

## **Germany Domestic Courier, Express, And Parcel (CEP) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

The Germany Domestic Courier, Express, And Parcel Market size is estimated at USD 25.72 billion in 2025, and is expected to reach USD 36.74 billion by 2030, at a CAGR of 7.39% during the forecast period (2025-2030).

### **Key Highlights**

- The German courier market is mainly driven by increasing e-commerce and high internet penetration.
- Germany boasts a rich history in logistics and transportation, leading to a vibrant and well-established parcel market. Various economic and political influences have shaped the evolution of this market. Consequently, Germany stands as Europe's largest parcel market.
- Germany's parcel market is bolstered by a vibrant landscape of numerous small and medium-sized firms. Over 12,000 companies operate in Germany's CEP market, with North Rhine-Westphalia housing the densest concentration. Dominating the scene are Deutsche Post DHL, Hermes Group, and DPD Group. Even amidst fierce competition and relentless innovation in Germany's CEP industry, firms have managed to maintain consistent revenue per shipment over the past twenty years. A closer look at the revenue streams reveals that parcel services are the primary revenue drivers in Germany's CEP market.
- Continuous innovations drive increasing returns to scale. Historical trends show that economies benefit from investing in innovation. In Germany's CEP market, firms consistently allocate significant resources to research and development, aiming to innovate and secure substantial earnings. This commitment is evident, with the German CEP market investing an average of over EUR 250 million (USD 273.09 Million) annually in innovation, viewing it as a strategic investment for future gains.
- As digitalization reshapes social and economic landscapes globally, there's a heightened dependence on the internet and smart devices for both personal and business activities. Over the past decade, the business-to-consumer (B2C) segment has dominated parcel shipments in Germany, accounting for approximately two-thirds of the total. This surge in B2C sales underscores the growing significance of direct transactions between businesses and consumers.

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## Germany Domestic Courier, Express, And Parcel (CEP) Market Trends

B2C segment holding a significant share in the market

B2C e-commerce continues to witness explosive growth year after year. In Germany, leading online shops account for over 40 percent of the nation's total e-commerce revenue.

German consumers have a clear affinity for online shopping, driven by factors like a broader product selection and competitive pricing. Dominating this landscape, amazon.de stands out as the top choice for German online shoppers, boasting the highest revenue.

When it comes to online purchases, electronics emerge as the frontrunner in popularity. Additionally, online shopping frequency is notable, with over 20% of Germans making purchases several times a month. Segment-wise forecasts for revenue growth in German e-commerce indicate a lasting trend in online shopping, with categories like fashion and electronics poised for substantial revenue increases.

In summary, Germany's B2C e-commerce landscape showcases robust growth metrics and shifting consumer preferences. However, economic pressures are prompting businesses to make strategic adjustments. As one of Europe's largest e-commerce markets, Germany holds promise for continued growth, even in the face of present challenges.

Infrastructure investments driving the market

In 2024, the German government is channeling substantial funds into infrastructure enhancements, notably dedicating EUR 57 billion (USD 62.26 billion) to green initiatives. This move is pivotal for refining the transportation network, which in turn, boosts the efficiency of the Courier, Express, and Parcel (CEP) market.

Major projects like the U5 Hamburg Subway Line Development and the expansion of Highway A281 aim to bolster connectivity and accessibility in urban areas. Such upgrades are essential for logistics operations, ensuring parcels are delivered timely and reliably.

Improvements in highways and rail systems promise reduced delivery times and lower operational costs. As logistics operations smoothen, CEP companies can scale up to meet the surging demands of the booming e-commerce sector.

These infrastructure upgrades are set to generate jobs in the CEP sector. A broadened logistics network will necessitate a bigger workforce to handle rising delivery demands, playing a vital role in economic growth and bridging skill gaps in the industry.

Germany Domestic Courier, Express, And Parcel (CEP) Industry Overview

The domestic CEP market in Germany is fragmented considering that there are several companies operating in the market with major players not holding most of the market share. Domestic deliveries are dominated by companies like DHL, Hermes, DPD, GLS, and UPS. Companies like DHL and Hermes, which are German companies, have a strong market presence in the country and also a strong international presence.

The delivery and third-party parcel companies are investing in technology to gain an edge and scale up their services in the country. After the pandemic, the volume of online deliveries has increased significantly, and delivery companies are trying to

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capitalize on this opportunity.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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