

Germany Express Delivery - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Germany Express Delivery Market size is estimated at USD 6.68 billion in 2025, and is expected to reach USD 8.24 billion by 2030, at a CAGR of 4.28% during the forecast period (2025-2030).

Key Highlights

- German express delivery market is primarily fueled by surging international trade activities and a growing demand for same-day delivery.
- One of the primary drivers driving the growth of the express delivery industry is the expansion of cross-border/international commercial routes, particularly in developing countries, which has increased the acceptance of international trade and B2C shipping. Furthermore, the growing consumer preference for shopping online via various e-commerce portals is boosting market growth. To distribute their products across domestic and international borders, e-commerce stores collaborate with courier service providers.
- In 2019, online stores achieved export net sales of USD 2.4 billion, far surpassing the marketplace export GMV, which was only USD 418 million. By 2023, the export marketplace GMV climbed to USD 1.1 billion. Although it still lags behind online store net sales, this 157% growth rate is impressive.
- Technological improvements, such as the use of digital technology with crowd-sourced distribution models, are also contributing to the market's favourable outlook. Other factors, such as rapid urbanization, rising consumer expenditure capacities, and significant growth in the manufacturing sector, are expected to propel the market even higher during the forecast period. There are automated package and freight shipping solutions available to improve the efficiency of retail merchants' overall shipping operation. Retailers will soon be able to delegate paperwork to shipping partners, such as electronically transmitting customs documentation, and enjoy a fast customs clearing procedure, reducing the time and expense associated with the associated paperwork.

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- Furthermore, as more regional and trade agreements are negotiated between governments and trading blocs, it has become more appealing for SMEs to enter new markets. The increase of a young, urban population is attributed to the rapid growth of cross-border e-commerce.
- The demand for same-day delivery is growing as it becomes a more popular shipping option for customers purchasing online. Technological innovations are gaining traction in the industry for same-day delivery services. The major competitors in the same-day delivery services sector are focusing on creating technology breakthroughs in their services to meet the growing demand.

Germany Express Delivery Market Trends

International segment experiencing substantial growth in the market

- In Germany's international landscape, online stores outpace marketplaces in exports. Conversely, for imports, the GMV from marketplaces surpasses the net sales from stores. Germany's primary eCommerce export partners are exclusively European. In contrast, its import partners span a broader spectrum, including Switzerland, the U.S., Turkey, and India. Fashion dominates as the leading imported category in German eCommerce, while exports are spearheaded by hobby & leisure, trailed by electronics.
- In 2019, online stores boasted export net sales of USD 2.4 billion, overshadowing the marketplace export GMV, which stood at a mere USD 418 million. Fast forward to 2023, and the export marketplace GMV surged to USD 1.1 billion. While still trailing behind online store net sales, this growth rate of 157% is noteworthy.
- Marketplaces now dominate imports, indicating that international marketplaces, rather than foreign online stores, are generating a higher GMV in Germany. This marks a significant shift from 2019 when foreign online stores outperformed marketplaces.
- In 2019, foreign online stores recorded import net sales of USD 414 million. While this was a mere fraction of that year's export sales, it still eclipsed the GMV from marketplace imports. By 2023, however, international marketplaces not only crossed the USD 1 billion mark in import GMV but also outpaced the import sales of online stores. German online stores excel in exports, bolstered by robust customer relationships and brand trust in neighboring nations.
- In the realm of imports, however, marketplaces are gaining ground. As German consumers increasingly shop beyond their borders, they are drawn to marketplaces for their competitive pricing and robust logistical support. This burgeoning marketplace trend in Germany mirrors the global shift towards marketplace dominance, underscoring their pivotal role in international eCommerce.
- In 2023, Otto led the pack with a cross-border export GMV of USD 573 million. Yet, despite its top position, Otto's export GMV is only about one-third of Amazon.de's leading export net sales, which stand at a hefty USD 1.6 billion. Otto's primary offerings are fashion, trailed by electronics, and its cross-border dealings are limited to Austria and the Netherlands, contributing 4% and 3.8% to its total GMV in 2023.
- On the import front, Galaxus emerged as the frontrunner, amassing an import GMV of USD 327 million in Germany. This figure more than doubles the import net sales of the leading online store, Amazon.com, which stands at USD 118 million. Galaxus, primarily a Swiss multinational marketplace, sees Germany as its second-largest market, accounting for nearly 20% of its total GMV in 2023. As international sales surge, the demand for express delivery in the market rises in tandem.

German e-commerce grappled with a downturn in 2023, as consumer spending curtailed

- In 2023, German e-commerce experienced a significant downturn, primarily driven by reduced consumer spending. Gross goods turnover plummeted by 11.8%, settling at EUR 79.7 billion (USD 83.48 billion), down from EUR 90.4 billion (USD 94.69 billion) in

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2022 The e-commerce share of total retail (excluding food but including pharmacy revenues) dipped to 10.2%, a drop from 11.8% in 2022.

- While digital services like vacation bookings and concert ticket sales saw a recovery, the momentum weakened. These services grew by 12.7% to EUR 12.7 billion (USD 13.30 billion), a stark contrast to the previous year's 39.9% surge to EUR 11.25 billion (USD 11.78 billion). Consequently, the combined turnover for the e-commerce sector (goods and services) fell below the EUR 100 billion (USD 104.74 billion) mark for the first time since 2020. Total revenues from online trade in 2023, including those generated via telephone, fax, or other means, reached EUR 93.6 billion (USD 98.04 billion).

- Retailers will remember 2023 as a year of significant shifts. Direct-to-consumer (D2C) retailers, despite an 11.1% revenue drop in 2022, have established a more stable long-term growth trajectory, boasting figures 62% above their pre-pandemic 2019 values. Marketplaces and online retailers saw declines of 8.5% and 14.7% respectively, yet both stand 19.0% and 7.0% above their pre-COVID values. Multichannel trading faced the steepest revenue drop at 18.1%, coinciding with a noted resurgence of customers at physical points of sale.

- Online shopping activity waned further in 2023. The proportion of regularly active online customers making purchases in the dipped to 34.3%, a notable decline from the 40% average in 2019 and below the four-year average. As the e-commerce landscape continues to wane, demand for express delivery services has seen a subtle dip.

Germany Express Delivery Industry Overview

The German express delivery market is fragmented with a lot of local, regional, and global players. Major players include DHL Group, Hermes Europe GmbH, Dynamic Parcel Distribution (DPD), General Logistics Systems B.V. (GLS), United Parcel Services (UPS), etc.

To better serve their customers, companies are integrating cutting-edge technological advancements into their supply chains. In June 2024, DHL Express, the world's foremost international express service provider, upgraded its AI-driven platform, "My Global Trade Services" (MyGTS), introducing a new "trade lane comparison" feature. This addition allows businesses, regardless of size, to access and reference current trade lane regulations and requirements between exporting and importing nations or territories. Consequently, firms eyeing market expansion can utilize this tool for informed decision-making, enhancing efficiency and securing a competitive edge.

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

1.1 Study Deliverables

1.2 Study Assumptions

1.3 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET INSIGHTS AND DYNAMICS

4.1 Market Overview

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- 4.2 Market Drivers
 - 4.2.1 Surge in demand for same day delivery driving the market
 - 4.2.2 Increased disposable income driving the market
- 4.3 Market Restraints
 - 4.3.1 High cost compared to traditional delivery methods hindering the market
 - 4.3.2 Regulatory constraints affecting the market
- 4.4 Market Opportunities
 - 4.4.1 Technological advancements driving the market
- 4.5 Value Chain / Supply Chain Analysis
- 4.6 Industry Attractiveness - Porter's Five Forces Analysis
 - 4.6.1 Threat of New Entrants
 - 4.6.2 Bargaining Power of Buyers/Consumers
 - 4.6.3 Bargaining Power of Suppliers
 - 4.6.4 Threat of Substitute Products
 - 4.6.5 Intensity of Competitive Rivalry
- 4.7 Government Regulations and Initiatives
- 4.8 Technological Trends in Industry
- 4.9 Insights on the E-commerce Industry (Domestic and Cross-border E-commerce)
- 4.10 Impact of Geopolitics and Pandemic on the Market

5 MARKET SEGMENTATION

- 5.1 By Business
 - 5.1.1 B2B (Business-to-Business)
 - 5.1.2 B2C (Business-to-Consumer)
- 5.2 By Destination
 - 5.2.1 Domestic
 - 5.2.2 International
- 5.3 By End User
 - 5.3.1 Services (BFSI (Banking, Financial Services and Insurance))
 - 5.3.2 Wholesale and Retail Trade (E-commerce)
 - 5.3.3 Manufacturing, Construction, and Utilities
 - 5.3.4 Primary Industries (Agriculture, and Other Natural Resources)

6 COMPETITIVE LANDSCAPE

- 6.1 Overview (Market Concentration and Major Players)
- 6.2 Company Profiles
 - 6.2.1 DHL Group
 - 6.2.2 Hermes Europe GmbH
 - 6.2.3 Dynamic Parcel Distribution (DPD)
 - 6.2.4 General Logistics Systems B.V. (GLS)
 - 6.2.5 United Parcel Services (UPS)
 - 6.2.6 FedEx Express
 - 6.2.7 DB Schenker
 - 6.2.8 Go Express
 - 6.2.9 Atlantic International Express
 - 6.2.10 Nippon Express *
- 6.3 Other Companies

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7 FUTURE OF THE MARKET

8 APPENDIX

8.1 Macroeconomic Indicators (GDP Distribution, by Activity, Contribution of Transport and Storage Sector to economy)

8.2 External Trade Statistics - Exports and Imports, by Product

8.3 Insights into Key Export Destinations and Import Origin Countries

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