

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

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### **Report description:**

The Netherlands Courier, Express, and Parcel (CEP) Market size is estimated at 9.55 billion USD in 2025, and is expected to reach 12.12 billion USD by 2030, growing at a CAGR of 4.88% during the forecast period (2025-2030).

Rising demand for domestic and international CEP services leading to expansion and improvements of delivery services

- The postal & courier activities industry in the Netherlands ranked fourth in Europe in 2022 (out of 25 total EU countries). The industry's rank (fourth) has remained the same since 2017. As of 2022, there were 10,070 businesses engaged in postal & courier activities in the Netherlands, which was an increase of 5% from 2021. In 2020, UPS had the highest market share in cross-border parcel transport in the Netherlands, with 45%, whereas DPD's market share amounted to 15%. PostNL, which dominates the domestic postal and parcel services, had a market share of roughly 20%.
- E-commerce is a significant factor in the growth in the demand for domestic CEP services in the country. The Dutch e-commerce market grew significantly in 2021 compared to 2020. That year, Dutch consumers spent roughly USD 34.65 billion on online purchases and orders. This made the country the seventh-largest e-commerce market in Europe in absolute terms, and online shopping accounted for more than 3% of its GDP. Consequently, around 373 million online purchases were made by 14 million buyers. With the country's e-commerce market expected to grow and reach USD 36.75 billion by 2027, the demand for domestic CEP deliveries is expected to rise significantly over the period.

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## Netherlands Courier, Express, and Parcel (CEP) Market Trends

The Dutch government's USD 8 billion transportation investment plan focus on public transit and road infrastructure

- In March 2024, the Dutch government announced a EUR 2.5 billion (USD 2.7 billion) investment to improve transport and infrastructure in the Eindhoven region to keep ASML from moving abroad. ASML, Europe's largest tech firm and a major supplier to chip makers, appreciated the plan but is still deciding on its future growth. The funds will be used over several years to enhance housing, education, transportation, and the electric grid in Eindhoven, Netherlands, where ASML is based.
- The Dutch government has outlined an ambitious plan to enhance transportation systems with a substantial investment of EUR 7.5 billion (USD 8.00 billion) over the next decade until 2030. The national government is slated to allocate EUR 4 billion (USD 4.26 billion) toward advancing public transportation endeavors. This encompasses extending Amsterdam's North-South Metro Line to Schiphol alongside a significant commitment of EUR 2.7 billion (USD 2.88 billion) for road enhancements. Additionally, an investment of EUR 780 million (USD 832.64 million) is earmarked for infrastructure upgrades to augment the network of bike lanes across the country.

Discount on fuel duty was introduced in 2022 after fuel prices surged in response to a spike in oil and gas prices globally

- In April 2024, oil prices in the Netherlands hit a six-month high due to unrest in the Middle East, causing fuel prices to rise. Oil prices increased nearly 3% in April and 19% since the start of 2024. As a result, petrol prices have also risen. The recommended price for a litre of Euro95 is EUR 2.27 (USD 2.42), over 20 cents more than at the beginning of 2024. The Netherlands is on track to become the second most expensive country in the world for a liter of petrol. Currently ranked fifth, it has been among the top ten most expensive countries for Euro95 petrol for the past two years.
- Beginning January 1, 2025, fuel prices are set to climb. Gasoline prices are projected to surge by approximately 25% per liter, while diesel is anticipated to rise by nearly 15 cents per liter. These hikes come as temporary political measures, in place until the close of 2024, come to an end. Furthermore, a fresh price adjustment in 2025 is poised to escalate costs even more, with initial estimates indicating a rise of 23.05 cents per liter for petrol and 14.93 cents per liter for diesel.

## Netherlands Courier, Express, and Parcel (CEP) Industry Overview

The Netherlands Courier, Express, and Parcel (CEP) Market is moderately consolidated, with the major five players in this market being DHL Group, FedEx, La Poste Group, Post NL and United Parcel Service of America, Inc. (UPS) (sorted alphabetically).

Additional Benefits:

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

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