

## **Postal Automation System - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-07-01 | 124 pages | Mordor Intelligence

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### **Report description:**

Postal Automation System Market Analysis

The postal automation system systems market size was valued at USD 9.65 billion in 2025 and is forecast to grow at a 17.71% CAGR, reaching USD 21.81 billion by 2030. Growth reflects rising cross-border e-commerce demand, postal modernization programs and sustained labor cost pressures that make automation economically attractive. North America and Europe account for the largest installed base because of sizeable public-sector investments and energy-efficiency regulations that favor next-generation equipment. Asia-Pacific is the fastest-growing region as China Post, Cainiao and Japan Post accelerate rural and urban automation projects, shortening delivery times and lowering manual labor costs. Hardware continues to dominate purchases, yet demand is shifting toward service contracts and robotics-as-a-service models that transfer performance risk to suppliers. Competitive intensity is moderate, with Vanderlande's purchase of Siemens Logistics and BlueCrest's acquisition of Fluence Automation redefining scale advantages in integrated hardware-software offerings.

Global Postal Automation System Market Trends and Insights

Surge in Cross-Border E-Commerce Parcel Volumes Driving High-Throughput Sorters

E-commerce parcels crossing borders continue to climb, with US parcel volumes reaching 21.7 billion in 2023 even as revenue per piece declined, underscoring the need for efficient high-throughput automation. Amazon Logistics overtook UPS on volume, proving that speed-optimized sorting networks confer a market edge. China Post and Cainiao lowered rural labor costs by

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deploying vision-guided systems that read waybills automatically, narrowing the urban-rural service gap. Operators now focus on processing density rather than cost per piece, since automation enables higher volumes without proportional staffing increases.

#### USPS "Delivering for America" Modernization Spurring Automation Upgrades

USPS committed USD 40 billion to revamp its network, expanding daily package capacity to 60 million items and aligning mail and parcel flows for improved reliability. Zebra Technologies printers, a new remote forwarding system, and the USPS Ship migration reinforce the digital layer underpinning physical automation. Suppliers leverage USPS specifications to scale similar solutions globally, creating a technology spill-over that accelerates adoption in other regions.

#### Legacy IT Integration Complexity Limiting Emerging Market Adoption

Developing posts often run on ageing platforms that cannot easily connect to modern sorters, extending project timelines and raising costs. The IMF highlights similar challenges in payment rails that mirror logistics bottlenecks, stressing a need for basic digital infrastructure before advanced automation can scale.

Other drivers and restraints analyzed in the detailed report include:

Labor Shortages Accelerating Robotic Singulation Adoption / EU Green Deal Demand for Energy-Efficient Systems / Capital-Intensive Investments Deterring Small CEP Operators /

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

The mail sorting systems market size attributed to hardware reached USD 6.2 billion in 2024, reflecting capital-intensive conveyor, sensor and OCR investments. Services produced a smaller revenue base but are projected to grow at a 20.8% CAGR to 2030 as operators favor managed outcomes over outright equipment ownership. Software licenses bridge the two, enabling live performance dashboards, route optimization and predictive maintenance that extend asset life.

Adoption of outcome-based contracts shifts risk to vendors, with Quadiant and BlueCrest guaranteeing throughput levels and uptime. These arrangements allow even mid-tier operators to access sophisticated capabilities without upfront capital, broadening the addressable base for the mail sorting systems market. Hardware spending will remain sizeable, yet revenue mix analysis shows services closing the gap by 2030 as subscription and pay-per-sort models scale.

Parcel sorters commanded 42% of the mail sorting systems market share in 2024 on the strength of long-established cross-belt and tilt-tray designs. Growth momentum, however, lies with automated guided vehicles and collaborative robots that post a 24.1% CAGR through 2030. Robotics removes fixed-track constraints, letting operators re-configure hubs quickly to manage seasonal peaks.

La Poste's data show mail contributing only 15.8% of revenue in 2024, down from 52% in 2010, signaling a structural shift away from letter-centric machinery toward parcel-centric robotics. Culler-facer-canceller units retain a niche in high-volume philatelic segments, but hybrid sites integrating AGVs, vision systems and coding modules deliver superior flexibility. Vendors now bundle fleet-management software with mobile robots, improving ROI for operators constrained by real estate limits in urban hubs.

The Postal Automation Systems Market Report is Segmented by Solution (Hardware, Software, Services), Technology (Parcel Sorters, Letter Sorters, AGV and Robotics, and More), Application (Parcel Sorting, Mail Sorting, Last-Mile Automation, and More),

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End User (Postal Operators, CEP Companies, E-Commerce Centers, and More), and Geography. The Market Forecasts are Provided in Terms of Value (USD).

## Geography Analysis

North America leads global revenue owing to the USPS "Delivering for America" program that injects USD 40 billion into facility upgrades and boosts daily capacity to 60 million packages. Canada follows a similar trajectory, adopting robotics to mitigate labor shortages in large urban hubs such as Toronto and Vancouver. Stable regulatory regimes and predictable parcel flows shorten payback periods, reinforcing vendor preference for early product rollouts in the region.

Europe contributes robust growth underpinned by the Net Zero Industry Act, which prioritizes energy-efficient equipment and accelerates replacement cycles. Germany's updated postal law gives Deutsche Post flexibility to optimize routes, while DHL holds 63% mail and 40% parcel market shares, creating economies of scale for nationwide automation. The United Kingdom's approval of the DHL eCommerce-Evri merger forms a combined network processing more than 1 billion parcels annually, anchoring further automation investments.

Asia-Pacific records the fastest CAGR, propelled by China Post and Cainiao's automation deployments and Japan's proposed 500-kilometer automated conveyor network to counter driver shortages. South Korea leverages advanced telecom infrastructure to roll out RFID-enabled sortation, while India wrestles with equipment tariffs that raise project costs. Australia's dispersed population boosts interest in robotics that can flexibly scale capacity across long distances.

Latin America delivers uneven performance. Mexico benefits from USMCA proximity, attracting cross-border parcel flows that justify automation in northern hubs. Brazil's compliance program supports e-commerce growth, yet tariffs on imported automation remain a drag on total cost of ownership. Argentina's economic volatility prolongs investment decision cycles, limiting market penetration for high-end solutions.

The Middle East and Africa remain nascent but promising. Gulf states invest in urban micro-fulfillment facilities that demand compact modular systems, while Africa faces legacy IT hurdles that slow deployments. International aid programs targeting postal infrastructure modernization could unlock future demand, especially as smartphone-led commerce expands across major urban corridors.

## List of Companies Covered in this Report:

Siemens Logistics GmbH / Toshiba Infrastructure Systems and Solutions Corp. / NEC Corporation / Pitney Bowes Inc. / Vanderlande Industries B.V. / Beumer Group GmbH and Co. KG / Solystic SAS / Fives Group / Bowe Systec GmbH / Interroll Holding AG / BlueCrest Inc. / Opex Corporation / EuroSort Systems / Honeywell Intelligrated / Dematic (Kion Group) / KUKA AG / Zhejiang Libiao Robotics / Fluence Automation LLC / Leonardo S.p.A. / Engineering Production and Installation (EPI) /

## Additional Benefits:

<ul> The market estimate (ME) sheet in Excel format /  
3 months of analyst support / </ul>

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