



Free
Preview

2025 European CEP Market Analysis

on 2021-2023 Actuals, 2024 Estimate and 2025-2030 Forecast

Effigy Consulting
March 2025

All Rights Reserved – Copyright 2025/2026
Latest news, reports and data library on effigy-consulting.com

Contact us to get more information about the full report (info@effigy-consulting.com)

SUMMARY

- 1. EFFIGY CONSULTING AT A GLANCE**
- 2. EUROPEAN CEP MARKET ANALYSIS**

- A. 2030 Forecast
- B. 2024 Top performers (carriers)
- C. 2024 Top markets (countries)
- D. 2023 Carrier Ranking based on Actuals in volume
- E. 2023 Carrier Ranking based on Actuals in revenue

Disclaimer

The information contained in this document is provided only as general information; accordingly, no guarantee is given, and no responsibility is taken for its accuracy or completeness. Effigy Consulting expressly disclaims all liability in respect to actions taken or not taken based on any or all of the contents of this document. While information is presented in good faith, Effigy Consulting cannot accept liability for any errors of fact or opinion.

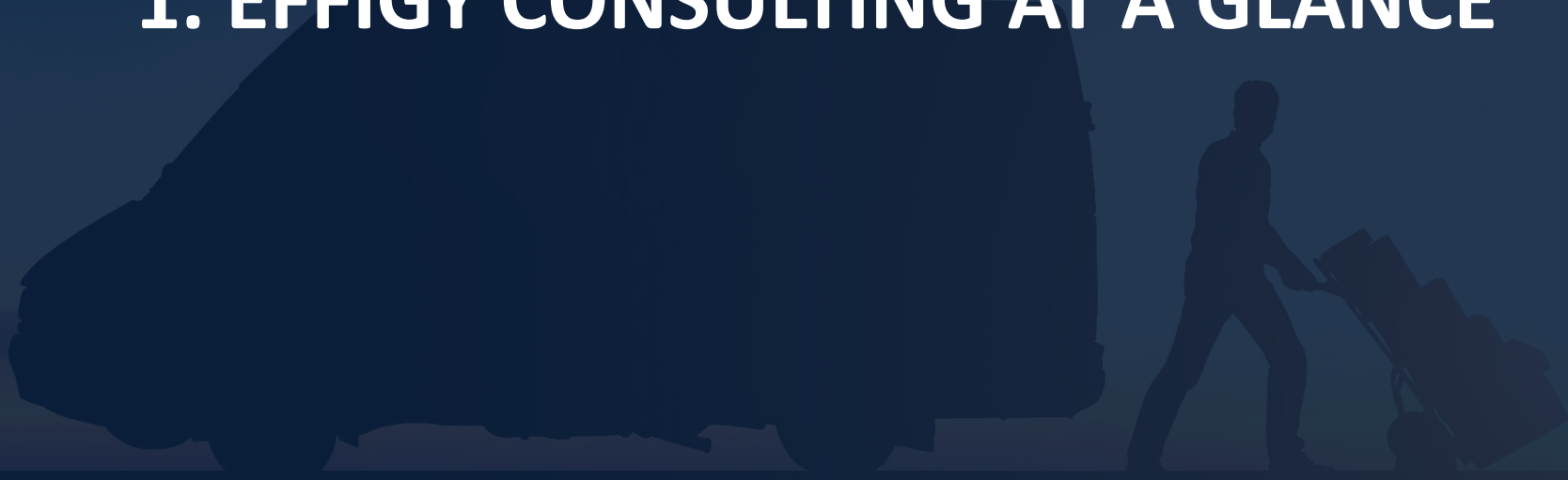
Intellectual rights and confidentiality

All rights reserved. This document remains the property of Effigy Consulting. It may not be distributed, duplicated, reproduced in any material form, including photocopying or storing by electronic means, or quoted (in full or in part) without prior written consent of Effigy Consulting.

Copyright 2025/2026 by Effigy Consulting

All rights reserved. The use of any part of this report reproduced, transmitted in any form or by any means, electronic, mechanical, photocopying, or otherwise, or stored in a retrieval system, without prior consent of Effigy Consulting's is an infringement of the copyright law.

1. EFFIGY CONSULTING AT A GLANCE



Effigy Consulting capabilities

Effigy Consulting, specialists of the Courier, Express and Parcel industry

FOCUSES ON

- Providing insights on **Postal and Courier, Express, Parcel (CEP)** Market since 2012

DEVELOPING

- CEP Market **Data Analytics** (Standardized and exhaustive dataset)
- CEP Market **Reports** (Standardized reports per geography)
- Dedicated **project** (Market research, Strategic/Transformation plan, ...)

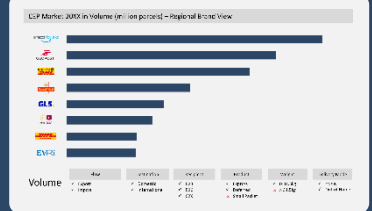
WITH A TEAM OF INDUSTRY ENTHUSIASTS

- A team of **20 Business Experts** that provides business, marketing and management consultancy

ACROSS 41 COUNTRIES

- Over **500,000 data points**
- **300 carriers**
- **42 countries**

Access to the finest datasets and insights on the Postal and Parcel Industry



500,000+ data points 300+ carriers 42 countries

Effigy Consulting capabilities

Through our daily monitoring of the CEP industry since 2012, we have gained extensive expertise

Content of our Core CEP MARKET Data base :

SCOPE

Europe (32)

AT, BELUX, BG, HR, CZ, DK, EE, FI,
FR, DE, GR, HU, IS, IE, IT, LT, LV, NL,
NO, PL, PT, RO, RU, RS, SK, SI, ES,
SE, CH, UA, UK, TR

North America (3)

US, CA, MX

Asia/Pacific (7)

CN/HK, JP, IN, TH, AU, NZ

Recently added countries

BR, ZA

Available years

(2012/2015 historical data)

2016-2023 Actuals

2024-2028 Forecasts

*Revenue, Volume and Market
share on all the scope and
granularity*



GRANULARITY

Product

- Express, Deferred, Small packets

Recipient

- B2B, B2C, C2B, C2C

Destination

- Domestic, International
- Intra EU, Intra Continent non-EU,
Extra Continent

Flow

- Import, Export

Weight break

- 0-31.5kg, 31.5-70kg

5-Year Forecast

Trade Lanes

Delivery Mode (2025)

- OOH, Home

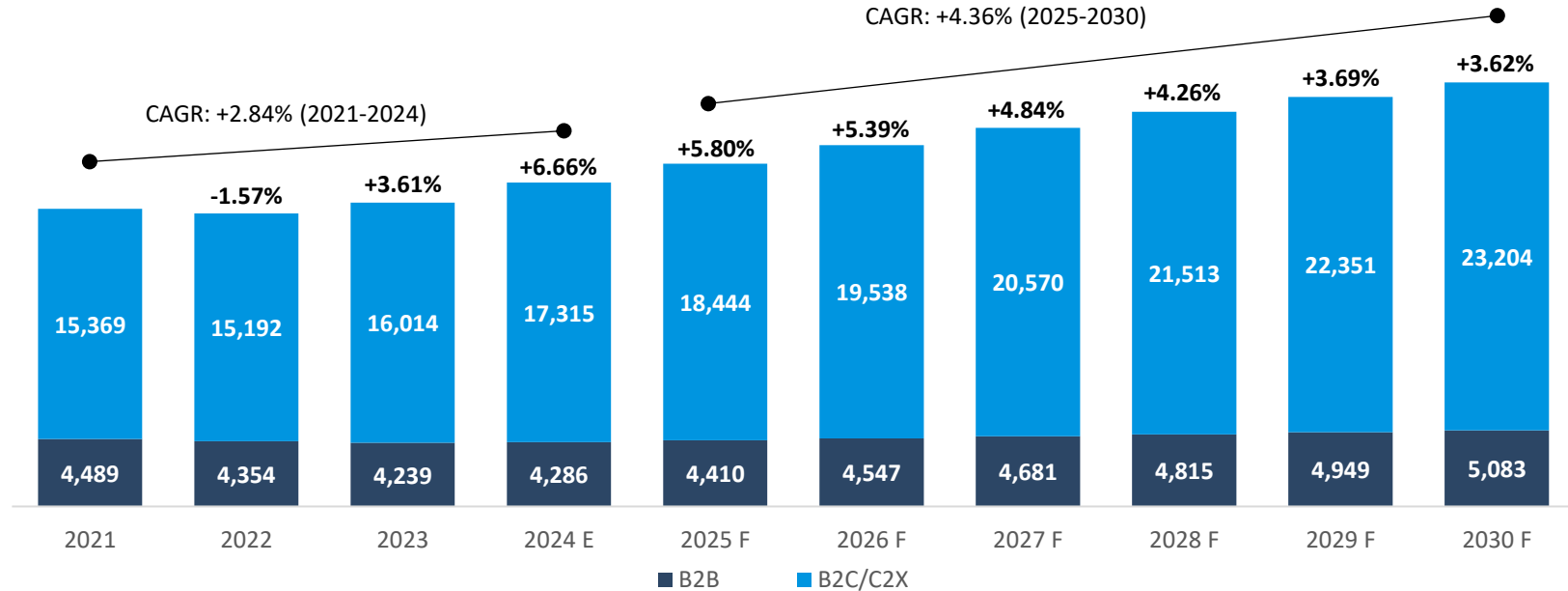
2. EUROPEAN CEP MARKET ANALYSIS



2025-2030 Forecast : 4.36% CAGR (in volume)

European CEP + Small Packet Market – 2030 Forecast in Volume – Split by Recipient

Volume in million of items



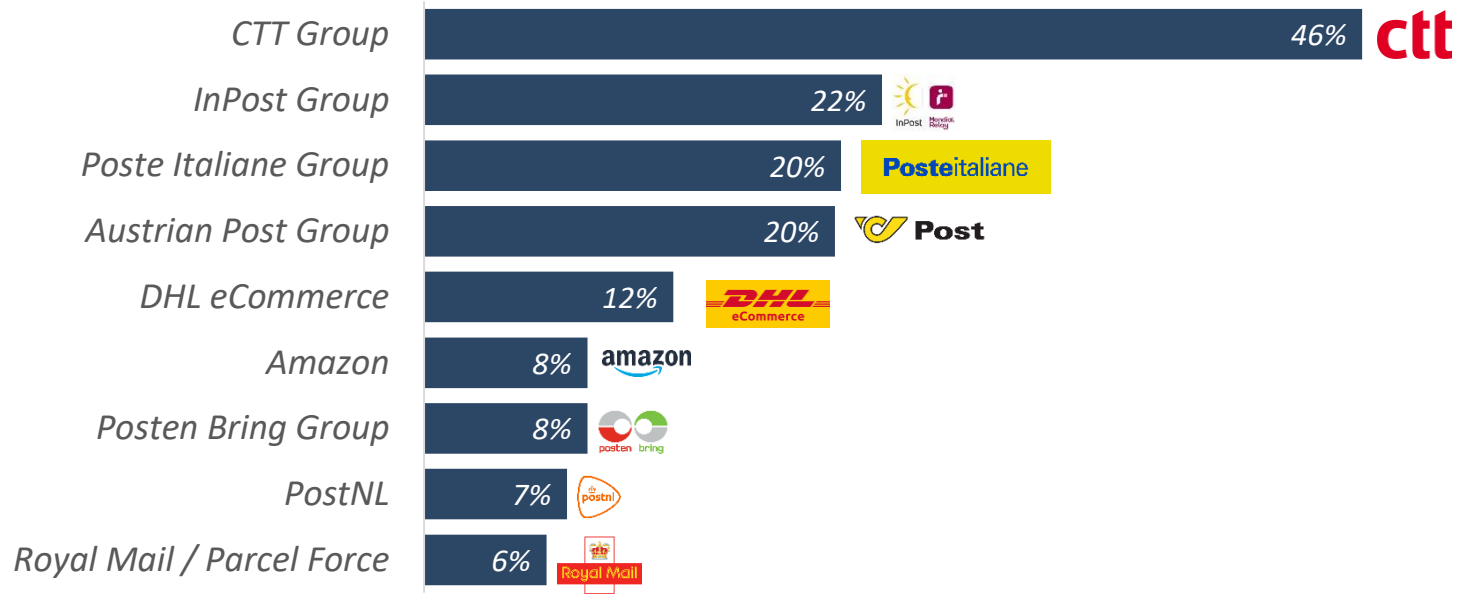
Flow	Destination	Recipient	Product	Weight	Delivery Mode
<ul style="list-style-type: none"> ✓ Export ✓ Import 	<ul style="list-style-type: none"> ✓ Domestic ✓ International 	<ul style="list-style-type: none"> ✓ B2B ✓ B2C ✓ C2X 	<ul style="list-style-type: none"> ✓ Express ✓ Deferred ✓ Small Packet 	<ul style="list-style-type: none"> ✓ 0-31.5kg ✗ > 31.5kg 	<ul style="list-style-type: none"> ✓ Home ✓ Out of Home

(1) 2024 Estimate. Express and Parcels. Express, Deferred and Small Packets included. Heavy Weight excluded.

Europe is defined as a selection of 32 countries (see [effigy-consulting.com](https://www.effigy-consulting.com/cep-market-report/) for more details : <https://www.effigy-consulting.com/cep-market-report/>)

2024 Top Performers (carriers)

European CEP Market 2024 – Top-line growth in Volume (2024 Estimate vs 2023 Actuals) – Brand View

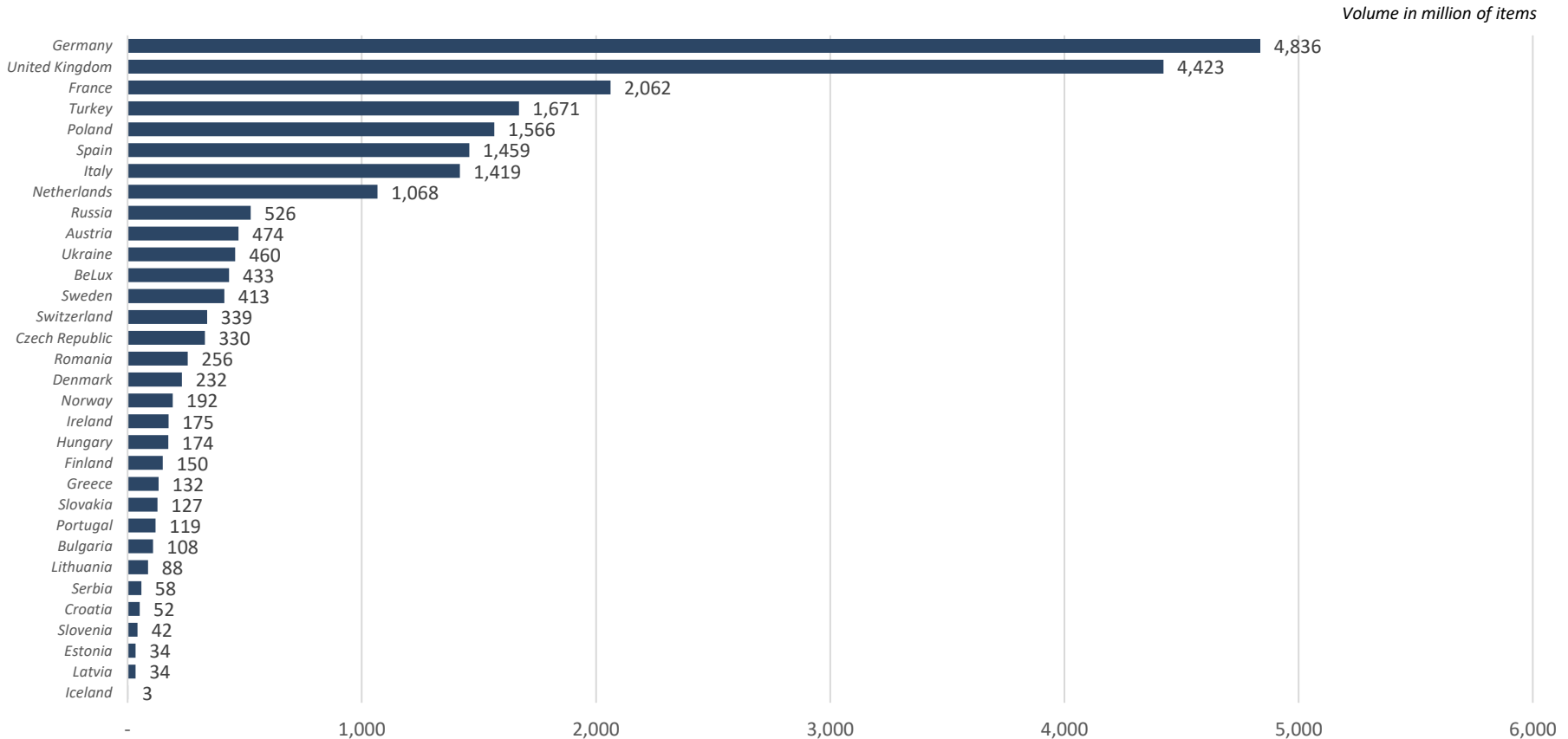


Flow	Destination	Recipient	Product	Weight	Delivery Mode
<ul style="list-style-type: none"> ✓ Export ✓ Import 	<ul style="list-style-type: none"> ✓ Domestic ✓ International 	<ul style="list-style-type: none"> ✓ B2B ✓ B2C ✓ C2X 	<ul style="list-style-type: none"> ✓ Express ✓ Deferred ✗ Small Packet 	<ul style="list-style-type: none"> ✓ 0-31.5kg ✗ > 31.5kg 	<ul style="list-style-type: none"> ✓ Home ✓ Out of Home

(2) Estimated results for 2024 (top-line in volume). Top performers among regional brands. All segments included, except Heavy Weight and Small Packets.

2024 Top Markets (countries)

European CEP Market 2024 – Top Markets (countries) in Volume (2024 Estimate)



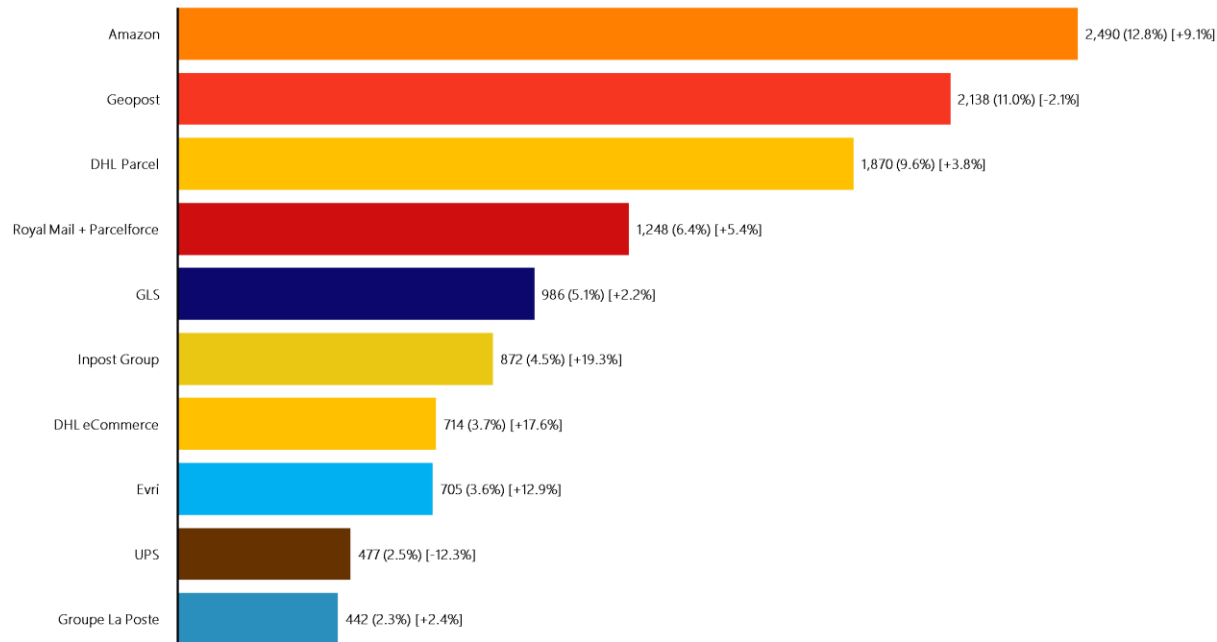
(1) 2024 Estimate. Express and Parcels. Express, Deferred and Small Packets included. Heavy Weight excluded.

2023 Carriers Ranking in volume

European CEP Market 2023 – Top10 Carriers in Volume (2023 Actuals)

Total market : 19,402 million parcels [+4.4%]

Europe CEP Market Regional Brand View volume in m parcels (Market Share) [growth vs. 2022]



Source : Effigy Consulting : CEP Market Research, www.effigy-consulting.com

Volume

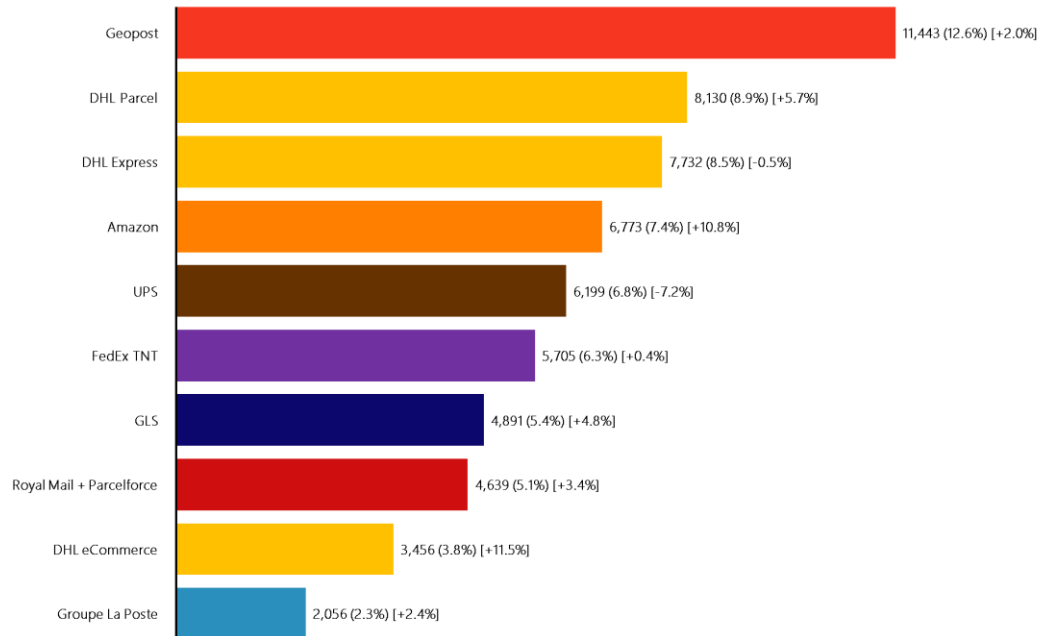
Product	Destination	Flow	Recipient	Weight	Delivery Mode
✓ Deferred	✓ Domestic	✓ Export	✓ B2B	✓ 0-31.5kg	✓ Home
✓ Express	✓ Intra-Cont	✓ Import	✓ B2C	✗ 31.5-70kg	✓ OoH
✗ Small Packet - Letter	✓ Extra-Cont		✓ C2X		✓ Outbound

2023 Carriers Ranking in revenue

European CEP Market 2023 – Top10 Carriers in Revenue (2023 Actuals)

Total market : €91,134 million [+5.2%]

Europe CEP Market Regional Brand View revenue in €m (Market Share) [growth vs. 2022]



Source : Effigy Consulting : CEP Market Research, www.effigy-consulting.com

Revenue

Product	Destination	Flow	Recipient	Weight	Delivery Mode
✓ Deferred	✓ Domestic	✓ Export	✓ B2B	✓ 0-31.5kg	✓ Home
✓ Express	✓ Intra-Cont	✓ Import	✓ B2C	✗ 31.5-70kg	✓ OoH
✗ Small Packet - Letter	✓ Extra-Cont		✓ C2X		✓ Outbound

Contact us to get more information about the full report



Baptiste BROSSARD KIMMEL

Managing Director

baptiste.brossard-kimmel@effigy-consulting.com



Philippe MASQUELIER

Managing Director

philippe.masquelier@effigy-consulting.com

Latest news, reports and data library on [effigy-consulting.com](https://www.effigy-consulting.com)