

Courier and Express Delivery - UK - May 2016

Report Price: £1495.00 | \$2421.08 | €1899.11

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"The increasing popularity of online shopping in both the B2B and B2C sectors is driving demand for parcel operators. Competition is increasing parcel volumes at a faster rate than revenue, and courier and express service operators will need to raise capacity to service demand, and innovate to increase turnover from faster premium services."

— Ambreen Ahmad, Research Analyst

This report looks at the following areas:

- How can operators meet growing and polarising demand from the B2C sector?
- How can operators encourage demand from the B2B sector?
- What innovations will drive the industry moving forward?

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Courier and Express Delivery - UK - May 2016

Report Price: £1495.00 | \$2421.08 | €1899.11

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Executive Summary

The market

B2C delivery volumes continue to provide engine for market growth

Figure 1: UK market for courier and express delivery services, 2011-15

Figure 2: Segmentation of the UK market for courier and express delivery services, by destination, 2011-15

Forecast volume and revenue growth

Figure 3: Forecast UK market for courier and express delivery services, 2016-20

Market factors

Operators battling to exploit market growth

Figure 4: Change in UK export volumes, 2014-15

Online retail sales continue to accelerate

Figure 5: Average weekly value for Internet retail sales 2015-2016

The consumer

Home delivery is still the preferred delivery choice

Figure 6: Delivery Location, March 2016

Figure 7: Preferred home delivery option, March 2016

Companies

What we think

Introduction

Definitions

Methodology

Abbreviations

Market positioning

The supplier

The customer

Key Insights

How can operators meet growing and polarising demand from the B2C sector

How can operators encourage demand from the B2B sector?

What innovations will drive the industry moving forward?

UK Economy

Overview

Figure 8: UK GDP quarterly development, 2003-16

Figure 9: UK GDP in economic downturns and recoveries since 1979

Inflation

Interest rates

House prices

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Courier and Express Delivery - UK - May 2016

Report Price: £1495.00 | \$2421.08 | €1899.11

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 10: UK House price changes, 2004-2016

Consumer spending

Manufacturing

Figure 11: UK manufacturing, 2013-16

Business investment

Figure 12: UK GFCF 2003-15

Imports

Exports

Market Factors

Key points

Total e-commerce sales

Figure 13: Growth in e-commerce sales 2008-2014

Figure 14: E-commerce sales, by sector 2014

Challenging export demand

Figure 15: Change in UK export volumes, 2014-15

Table highlights:

Impact of Brexit

The rise of online retail sales

Figure 16: Average weekly value for Internet retail sales 2015-16

Table highlights:

Difficulty keeping pace with online demand

Confidence among middle-to-high income households behind premium service demand

Figure 17: Thinking about how you spend your money, which of the following have you done over the last three months? And which do you plan to do over the next three months? November, 2015

Table highlights:

Temporary easing of fuel costs provides light relief

Figure 18: Typical retail cost of fuel and fuel duty level in the UK, 2011-15

Table highlights:

Market Size

Key points

B2C delivery volumes act as continued engine for growth

Figure 19: UK market for courier and express delivery services, 2011-15

Table highlights:

Market Segmentation

Key points

UK economic recovery boosts internal market

Figure 20: Segmentation of the UK market for courier and express delivery services, by destination, 2011-15

Table highlights:

Figure 21: Segmentation of the UK market for courier and express delivery services, by destination, 2011-15

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Courier and Express Delivery - UK - May 2016

Report Price: £1495.00 | \$2421.08 | €1899.11

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table highlights:

Figure 22: Segmentation of the internal courier and express delivery market, by time sensitivity, 2011-15

Table highlights:

Figure 23: Volume segmentation of the internal courier and express delivery market, by time sensitivity, 2011-15

Table highlights:

Market Trends

Key points

Prices rise in 2015

Figure 24: UK postal and courier services price index, 2013-15

Table highlights:

Technology developments forecast changing industry dynamics

Innovation Trends

Autonomous truck conveys

Driver-less inner-city delivery vans

Delivery drones

The Consumer

Experience of using courier and express service delivery

Over 85% of consumer have used courier and express service delivery

Figure 25: Delivery Experience, March 2016, (% of Respondents)

Table Highlights:

Older consumers most likely to have received an order via courier and express delivery service

Figure 26: Age of those utilising courier or express delivery, March 2016, (% of Respondents)

Table Highlights:

CED services used across the UK

Figure 27: UK region of those consumers with any experience of using courier and express delivery, UK, March 2016

Table highlights:

Delivery Location

Home delivery reigns supreme

Figure 28: Delivery Location, March 2016, (% of Respondents)

Table Highlights:

Arrival times

Most deliveries arrive next-day

Figure 29: Arrival time of delivery, March 2016, (% of Respondents)

Arrival times of deliveries by age

Figure 30: Arrival time by age 2016, (% of Respondents)

Table Highlights:

Purchase Retailer

Figure 31: Purchase location, March 2016, (% of Respondents)

Table Highlights:

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Courier and Express Delivery - UK - May 2016

Report Price: £1495.00 | \$2421.08 | €1899.11

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Available delivery timings

Figure 32: Delivery timings, March 2016, (% of Respondents)

Table Highlights:

Delivery timings by income

Figure 33: Delivery time chosen by income 2016, (% of Respondents)

Table Highlights:

The Consumer - Purchase decisions

Figure 34: Impact of delivery options on purchase decisions, March 2016, (% of Respondents)

Table Highlights:

Figure 35: Impact of delivery options on retailer choice, by age March 2016, (% of Respondents)

Table Highlights:

The Consumer - Subscription member

Figure 36: Subscription membership status, March 2016, (% of Respondents)

Figure 37: Subscription membership status, by age, March 2016, (% of Respondents)

Table Highlights:

The Consumer - preferred delivery time slots

Figure 38: Preferred home delivery option, March 2016, (% of Respondents)

Table Highlights:

Industry Structure

Key points

Industry development

Figure 39: Corporate liquidations and insolvency procedures in postal and courier activities sector, 2011-15

Table highlights:

Greater capacity is increasing competition

Figure 40: Analysis of the changes in the structure of the postal and courier activities sector, 2011-15

Table highlights:

Structure by turnover

Figure 41: Analysis of the financial structure of the postal and courier activities industry, 2014 and 2015

Table highlights:

Structure by employment

Figure 42: Analysis of the employment structure of the postal and courier activities industry, 2014 and 2015

Table highlights:

CitySprint

Recent company activity

Figure 43: Financial analysis of CitySprint, 2010-14

Table highlights:

Company strategy

DHL Express (UK)

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Courier and Express Delivery - UK - May 2016

Report Price: £1495.00 | \$2421.08 | €1899.11

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Recent company activity

Figure 44: Financial analysis of DHL Express (UK), 2010-14

Table highlights:

Company strategy

DX Group

Recent company activity

Figure 45: Financial analysis of DX Group, 2011-15

Table highlights:

Figure 46: Financial segment analysis of DX Group, 2010-15

Table highlights:

Company strategy

FedEx UK

Recent company activity

Figure 47: Financial analysis of FedEx UK 2011-15 (£ Million)

Table highlights:

Company strategy

DBD Group UK (formerly Geopost UK Ltd)

Recent company activity

Figure 48: Financial analysis of DBD Group UK 2010-15

Table highlights:

Company strategy

Hermes Parcelnet

Recent company activity

Figure 49: Financial analysis of Hermes Parcelnet, 2011-15

Table highlights:

Company strategy

TNT UK

Recent company activity

Figure 50: Financial analysis of TNT UK, 2010-14

Table highlights:

Strategy

Tuffnells

Recent company activity

Figure 51: Financial analysis of Tuffnells Parcels Express, 2011-15

Table highlights:

Company strategy

UK Mail

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Courier and Express Delivery - UK - May 2016

Report Price: £1495.00 | \$2421.08 | €1899.11

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Recent company activity

Figure 52: Financial analysis of UK Mail, 2011-15

Table highlights:

Figure 53: Financial segment analysis of UK Mail, 2011-15

Table highlights:

Company strategy

UPS

Recent company activity

Figure 54: Financial analysis of UPS, 2010-14

Table highlights:

Company strategy

Yodel

Recent company activity

Figure 55: Financial analysis of Yodel, 2011-15

Table highlights:

Company strategy

Forecast

Key points

Maturing e-commerce market will slow parcel growth rate

Figure 56: Forecast UK market for courier and express delivery services, 2016-20

Table highlights:

Internal market to outperform international to 2020

Figure 57: Forecast segmentation of UK market for courier and express delivery services, 2016-20

Table highlights:

Further Sources & Contacts

Trade associations

Trade magazines

Transport News

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com