

Courier/Express Delivery - UK - May 2018

Report Price: £1495.00 | \$2018.70 | €1682.47

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



“Courier and express delivery services continue to surge, driven primarily by the burgeoning B2C sector and boom in online retail. However, the industry has been marked by intense pricing competition and slim margins. Mounting expectations among the consumer base grow evermore demanding, with convenience and price apex to this.”

– **Marco Amasanti, B2B Analyst**

This report looks at the following areas:

- How are companies looking to maintain profitability in light of margin pressure and strong competition in the market?
- What drove market value over the past year?
- How has the rise of online shaped the market in recent years?
- Where are there growth opportunities in the market?
- What does the future of the courier and express delivery look like?

**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/Express Delivery - UK - May 2018

Report Price: £1495.00 | \$2018.70 | €1682.47

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

Figure 1: UK courier and express delivery services market value and volume, 2013-17

Market segmentation

Figure 2: Courier and express delivery services market segmentation, internal and international, 2013-17

Figure 3: Courier and express delivery services market segmentation, internal and international, 2013-17

Market factors

Online retail continues to surge

Figure 4: All online retail sales and online sales as a % of all retail sales, 2012-17

Boom of online-only stores

Figure 5: Online-only and store based retailers, share of all online sales, 2009-18

Pricing increases freeze

Figure 6: Price index in the courier services sector, 2012-17

Growing internet access, usage and shopping

The consumer

Figure 7: Delivery method, % of respondents, February 2018

Laptops still dominate, but mobile phone orders continue to grow

Convenience continues to drive the use of delivery over in-store purchases

Figure 8: Factors behind delivery use, % of respondents, February 2018

The rise of returns has pressured operator margins in recent years

Future innovation interest is driven largely by demand for greater convenience and flexibility

Figure 9: Interest in future developments, % of respondents, February 2018

Market forecasts

Figure 10: Courier and express delivery services market forecast, 2018-22

Technological advancements in the delivery process

Major new entrants to the marketplace

What we think

Introduction

Issues in the market

Definitions

Methodology

Abbreviations

Market positioning

The supplier

The customer

Key Insights

**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/Express Delivery - UK - May 2018

Report Price: £1495.00 | \$2018.70 | €1682.47

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

Legal action around employment rights

Action from DPD

Growing strain of returns

Market Size

Key points

Figure 11: UK market value for courier and express delivery services, 2013-17

Figure 12: UK market volume for courier and express delivery services, 2013-17

Market Segmentation

Key points

Internal delivery continues to consolidate total market

Figure 13: Courier and express delivery services market segmentation, internal and international, 2013-17

Figure 14: Courier and express delivery services market segmentation, internal and international, 2013-17

Market Factors

Key points

Online retail continues to surge

Figure 15: All online retail sales and online sales as a % of all retail sales, 2012-17

Boom of online-only stores and the countered call for high street retailer delivery subscriptions

Figure 16: Online-only and store based retailers, share of all online sales, 2009-18

Rise of subscription schemes

Price growth slowed in 2017 amid growing competition

Figure 17: Price index in the courier services sector, 2012-17

Growing internet access and mobile usage

Online shopping on the rise

Industry Structure

Key points

Industry development

2016 saw a series of acquisitions

Changes to the industry

Figure 18: Analysis of changes in courier activities, by number of businesses and outlets, % change, 2013-17

Industry by turnover

Figure 19: Analysis of the financial structure of courier activities, % of total, 2016 and 2017

Industry by employment

Figure 20: Analysis of the employment structure of courier activities, % of total, 2016 and 2017

Company Profiles

City Sprint UK

Recent company activity

Financials

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/Express Delivery - UK - May 2018

Report Price: £1495.00 | \$2018.70 | €1682.47

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

Figure 21: Financial analysis of City Sprint UK, 2012-16

Company strategy

DPD Group UK

Recent company activity

Financials

Figure 22: Financial analysis of DPD Group UK, £ million, 2012-13 & 2015-17

Company strategy

DX Group

Recent company activity

Financials

Figure 23: Financial analysis of DX Group, £ million, 2013-17

Company strategy

FedEx UK

Recent company activity

Financials

Figure 24: Financial analysis of FedEx UK, £ million, 2013-17

Company strategy

Hermes

Recent company activity

Financials

Figure 25: Financial analysis of Hermes, £ million, 2013-17

Company strategy

Parcelforce Worldwide

Recent company activity

Financials

Figure 26: Analysis of Parcelforce Worldwide, value and volume, 2015 and 2016

Company strategy

TNT UK

Recent company activity

Financials

Figure 27: Financial analysis of TNT UK, £ million, 2012-15 and 2017

Company strategy

UK Mail

Recent company activity

Financials

Figure 28: Financial analysis of UK Mail Group, £ million, 2012-16

Company strategy

**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/Express Delivery - UK - May 2018

Report Price: £1495.00 | \$2018.70 | €1682.47

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

UPS

Recent company activity

Financials

Figure 29: Financial analysis of UPS UK, £ million, 2012-16

Company strategy

Yodel

Recent company activity

Financials

Figure 30: Financial analysis of Yodel, £ million, 2012-16

Company strategy

The Consumer

Key points

Experience of industry

Figure 31: Delivery experience, February 2018

Method of Delivery

Figure 32: Delivery method, % of respondents, February 2018

Method of Order

Figure 33: Order method, February 2018

Devices used

Figure 34: Use of device, % of respondents, February 2018

Younger consumers driving smartphone usage

Reason for Delivery

Figure 35: Factors behind delivery use, February 2018

Increasing Strain of Returns

Figure 36: Use of returns, February 2018

Figure 37: Method of return, February 2018

Future Enhancements

Figure 38: Interest in future developments, February 2018

Same-day and evening deliveries

GPS and geo-location

Consumers want control

Market Forecast

Key points

The market

Figure 39: Courier and express delivery services market forecast, 2018-22

Market factors

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/Express Delivery - UK - May 2018

Report Price: £1495.00 | \$2018.70 | €1682.47

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

Continued growth in online retail

Figure 40: Forecast online retail market, 2018-22

New means of delivery via technological progress

New entrants to the market

Further Sources and Contacts

Trade associations

Association of International Courier & Express Services

Institute of Couriers

The National Courier and Despatch Association

Trade magazines

Courier News

Post and Parcel

Trade exhibitions

eDelivery Expo

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