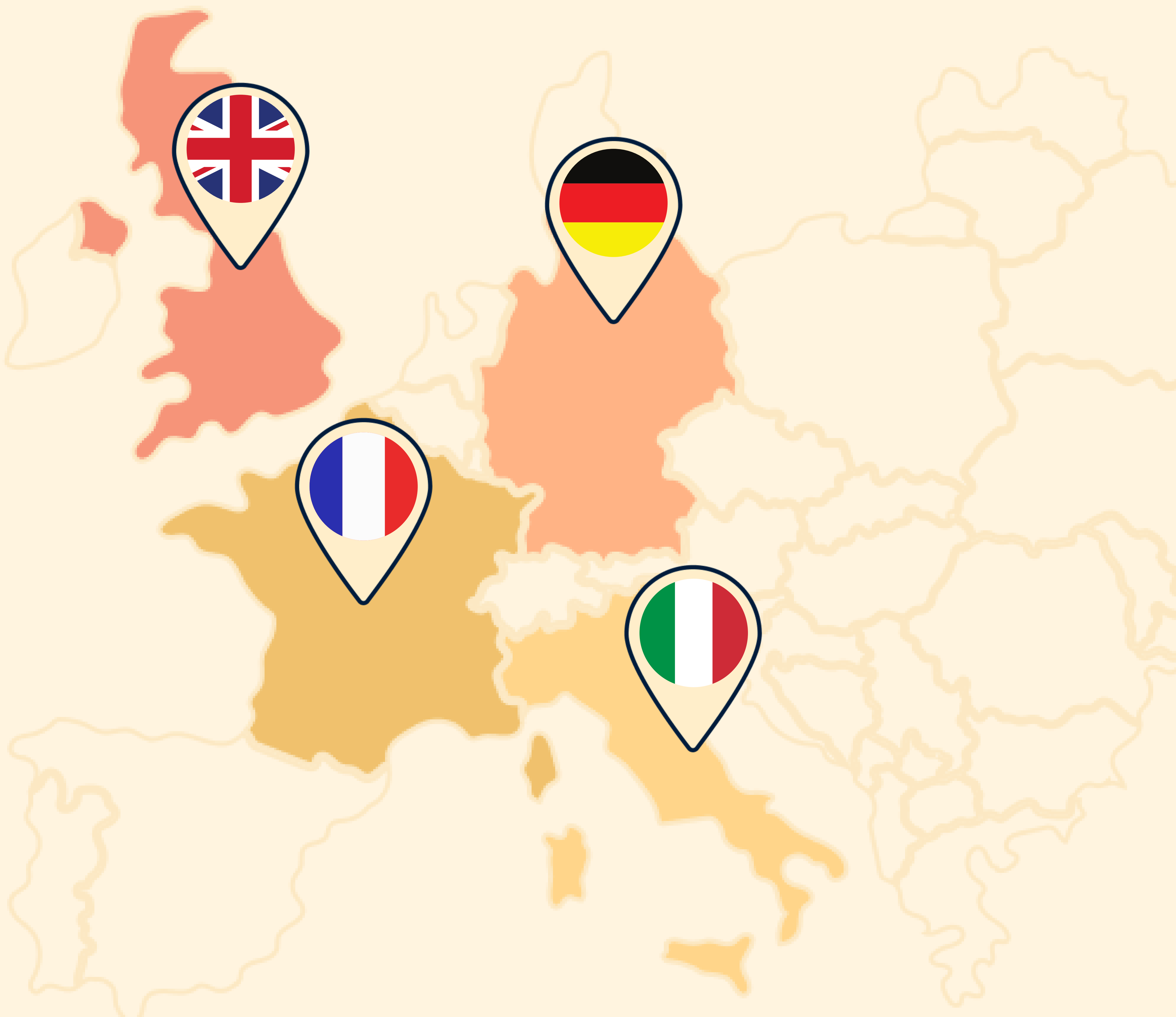


# Europe E-Commerce Logistics Market Report 2024

How has e-commerce evolved in the United Kingdom, Germany, France and Italy?



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# 01 About the Report

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## What to Expect

The European e-commerce landscape continues to flourish, with projections indicating a promising ascent to [nearly 900 billion U.S. dollars](#) in revenue by 2028. As the market expands, understanding the intricacies of the e-commerce logistics sector becomes increasingly vital for stakeholders and decision-makers. With this in mind, let us delve deeper into the state of e-commerce and delivery performance of 4 European countries – **France, Germany, Italy, and the United Kingdom** – in this report.

## Data Methodology

Our benchmarking and carrier performance measurement involves the collection of billions of **anonymized data points from more than 170 countries** annually. We harness data from millions of parcels spanning **1,045+ carriers** globally – tracked by real consumers across all industries.

Based on these granular real-time data insights, we are able to drill down into specific trade lane performance, comparing domestic but also international shipment profiles across all carriers. All benchmarking data sets have been compiled with strict minimum requirements for data point quantity, quantity and comparability.

**Want to learn more about our data?**

**GET IN TOUCH TODAY**



## 02 E-Commerce Landscape in Europe

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Europe's e-commerce market has undergone remarkable expansion in the last decade, particularly during the COVID-19 pandemic. According to [CBRE's E-Commerce in the Post-Pandemic Era report \(2023\)](#), the **United Kingdom (UK), Germany, France, and Italy account for about 62% of total European e-commerce spend**. Among these, the UK and Germany lead with the largest market shares, together accounting for close to half of total spend.

### E-Commerce Penetration Growth Plateaus Following Pandemic Surge

Following the end of lockdown restrictions and the re-opening of physical retail stores, **e-commerce penetration rates** have held steady or even declined in [most European markets](#). This trend suggests that consumers value the in-person shopping experience and were eager to return to physical stores once restrictions were lifted.

The flatlining of e-commerce penetration growth might also indicate that these key markets are **nearing their saturation point for e-commerce penetration rates**, though further data and analysis are required to confirm this hypothesis. Nevertheless, it is evident that the pandemic-induced surge in e-commerce has not sustained its momentum, thus underlining the importance of physical retail in the consumer experience.

### B2C E-Commerce Users On an Upward Trajectory in Europe

Europe has witnessed a consistent increase in the number of business-to-consumer (B2C) e-commerce users, with figures growing from **390 million in 2017 to 540 million by the end of last year**. Projections indicate that this [upward trend will continue](#), with expectations of **552 million users in 2024 and 586 million by 2027**.

As the B2C user base expands, businesses must tailor their strategies to cater to a larger and more diverse set of consumers. Understanding the needs and preferences of these new users will be crucial in staying competitive in the evolving digital marketplace. Companies that can effectively adapt to the changing landscape will be well-positioned to capture a larger share of the growing European e-commerce market.

**Looking for more insights into changing sentiment and behavior trends in Europe?**

[Check out our recent article here.](#)

## 03 Cross Border E-Commerce in Europe

Despite experiencing a decline in the number of shoppers following Brexit, the cross-border e-commerce market in Western Europe is witnessing a [significant surge in activity](#). This trend highlights a shift in consumer behavior, with individuals becoming more comfortable purchasing from foreign retailers despite potential logistical or regulatory challenges. Factors such as globalization, improved shipping infrastructure, and the proliferation of online marketplaces have facilitated this surge in [cross-border e-commerce](#), enabling consumers to access a broader range of products and brands from around the world.

Against this backdrop, here are the **busiest cross-border shipping routes in Europe**, based on our representative data across millions of real e-commerce shipments in 2023:

### Denmark to Germany

In the realm of cross-border e-commerce, [Denmark to Germany \(DK-DE\)](#) has risen to prominence as the third-busiest and most vital shipping route in Europe. The [OEC statistics](#) underscore its significance, with [Germany](#) exporting €1.62 billion worth of goods to [Denmark](#) and importing €1.22 billion in return, resulting in a robust **positive trade balance of €399 million in July 2023 alone**.

What sets this route apart is not only its bustling activity but also its commitment to timely deliveries. The top carriers on the DK-DE route such as [PostNord Denmark](#), DHL Paket and UPS have collectively achieved an **average parcel transit time of 2.07 days in Q4 2023**, allowing businesses and end-consumers on both ends of the route to rely on a reasonably quick and dependable flow of goods. Moreover, the **average first-attempt delivery success rate among these carriers stands at an impressive 88.6%**, further attesting to the proficiency and dedication of the carriers between these European markets.



## 03 Cross Border E-Commerce in Europe

### Germany to Austria

In both [Germany](#) and [Austria](#), the e-commerce sector has seen steady expansion over the past few years, with more consumers turning to online platforms for their shopping needs. While the [Germany to Austria \(DE-AT\)](#) route might not boast the quickest transit times or the highest delivery success rates compared to some other cross-border routes, it remains an essential artery for trade and e-commerce in the heart of Europe.

Key logistics carriers on the DE-AT route – [DHL Paket](#), [Österreichische Post \(Express\)](#), [GLS Germany](#), and [UPS](#) – collectively contribute to the reliability and efficiency of cross-border trade. On average, **parcels take about 2.26 days to transit the route**, and the **average first-attempt delivery success rate stands at 84.8%** in Q4 2023, which still signifies a commitment to the reliable movement of goods, despite being on the lower end of the spectrum.

**Not sure how to fully utilize these carrier performance metrics?**

[Here's how you can leverage them to optimize logistics operations.](#)

### Czech Republic to Germany

[Czech Republic to Germany \(CZ-DE\)](#) is one of the busiest cross-border shipping routes in Europe, serving as a vital conduit for the efficient exchange of goods and services across the border. Considering the close economic relationship and the robust trade history that the two countries have, it's no surprise that this route is among the busiest in the region. As a matter of fact, Germany accounted for more than [29% of Czech's foreign trade turnover](#), with the exports accounting for a whopping [US\\$79.2 billion in 2022](#) alone.

Based on our real parcel insights, the CZ-DE route appears to be primarily dominated by a handful of logistics carriers, including [DPD Germany](#), and [DHL Paket](#), and [Hermes](#), and in terms of delivery performance, these carriers boast an **average parcel transit time of 1.57 days** and an **average first-attempt delivery success rate of 91.9%** in Q4 2023.

[Request for a personalised analysis on specific carriers and trades lanes.](#)

## 03 Cross Border E-Commerce in Europe

### Netherlands to Germany

Germany and the [Netherlands](#) are not only neighbors but also [close bilateral, EU, and multilateral partners](#). This partnership extends to economic collaboration, where exports and innovation play a pivotal role in both nations' economies. The Netherlands, in particular, boasts strong sectors in services, including the financial sector, trade, agriculture, and industry.

The [Netherlands-Germany \(NL-DE\)](#) shipping route embodies the robust and intricate bond between the Netherlands and Germany, facilitating seamless cross-border trade. Among the prominent carriers servicing this route is [Post NL](#), boasting an **average parcel transit time of 2.26 days**. While Post NL holds a significant presence in the Netherlands, other key carriers such as DHL Paket, GLS, and DPD also play pivotal roles, collectively achieving an average transit time of 1.58 days.

### Germany to Belgium

Consumers in [Belgium](#) exhibit a remarkable tendency to make a substantial quantity of their online purchases cross-border, surpassing the buying patterns observed in many other EU countries. In fact, **55% of e-commerce in Belgium is cross-border**, with **22% of its online purchases originating from Germany**. This phenomenon can be attributed to the relatively underdeveloped state of Belgian e-commerce platforms compared to their counterparts in neighboring countries like the Netherlands and France.

According to our in-house data, [DPD Worldwide](#) has distinguished itself as a prominent carrier on this route, along with [Belgium Post \(bPost\)](#), DHL Paket, and GLS Germany. Collectively, these five carriers handle a huge bulk of the cross-border shipments in the [DE-BE route](#), ensuring that goods move swiftly and reliably between the two countries. The route boasts an **average transit time of 2.25 days** and an **average first-attempt delivery success rate of 89.7% in Q4 2023**, which is indicative of the overall dedication of these carriers to meet the needs of businesses and consumers in both countries.

# Achieve operational excellence with our carrier and market data

## 1 Gain In-Depth Analysis of Carrier Performance

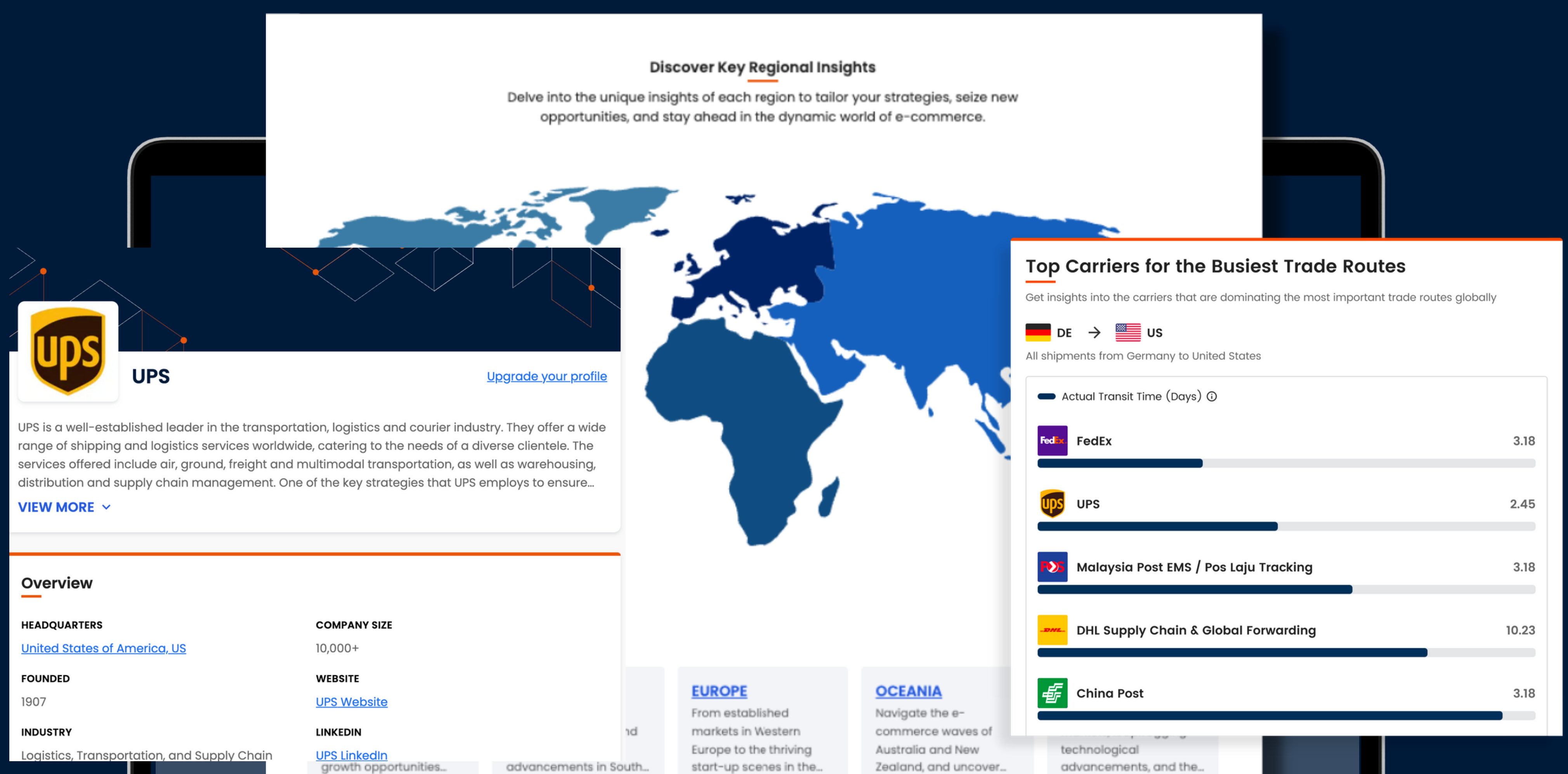
Companies can utilize our carrier performance data (e.g. parcel transit times) to select the most suitable logistics partners capable of handling the increased e-commerce order volume in the coming months.

## 2 Unlock Exclusive Access to Market Data

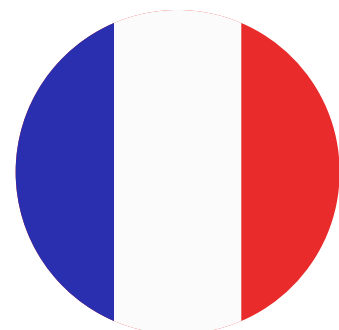
By being our esteemed partner, retailers and logistics carriers can gain access to exclusive insights on global trade lanes and a range of market-specific data.

## 3 Position Yourself as a Leading Player in Your Market

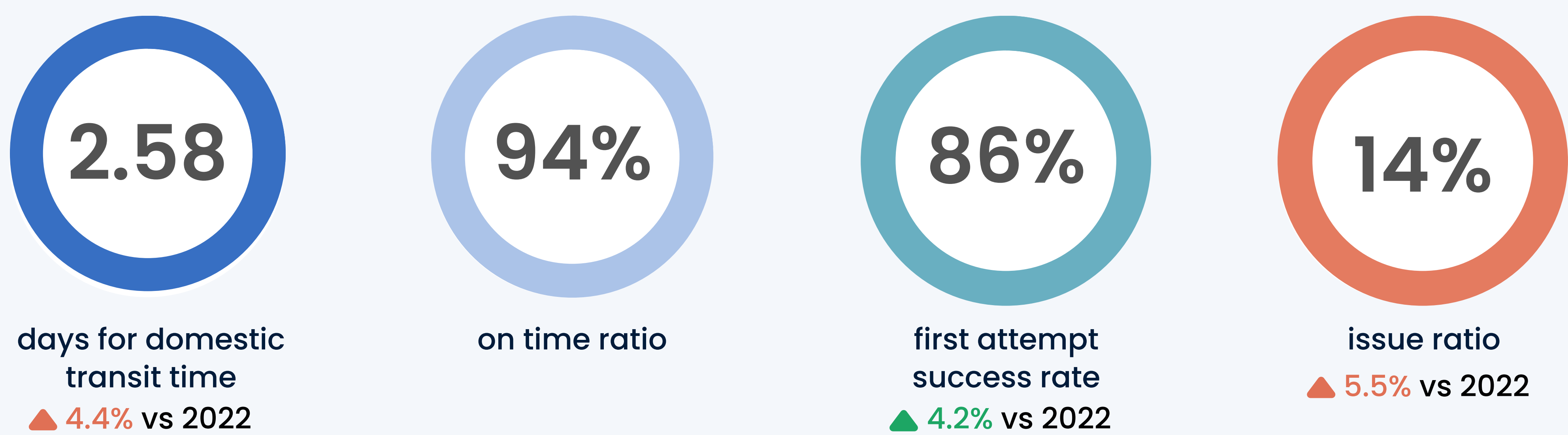
Businesses can leverage our company listings to boost their brand presence, showcase their services, and forge strategic collaborations across the industry.



# 04 Delivery Performance in France



## France's Logistics Performance in Numbers

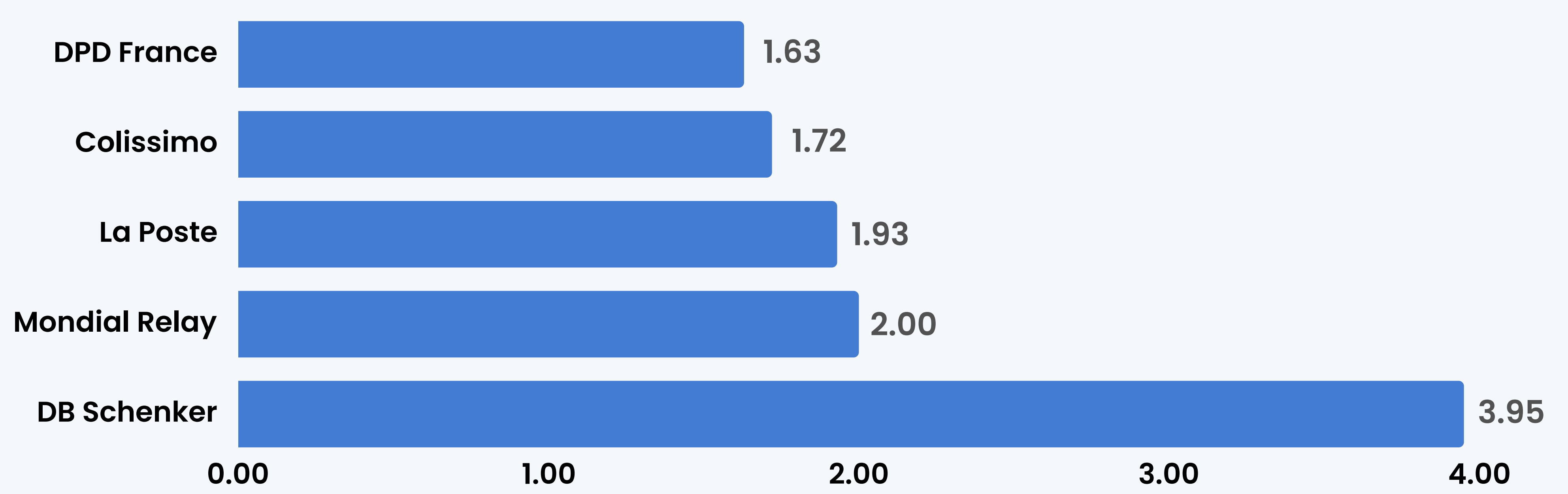


In [France](#), the e-commerce sector encountered a blend of advancements and hurdles in its logistics performance over the past year. Despite a **minor setback of 4.4% in domestic parcel transit time**, there was a **4.2% increase in the first-attempt delivery success rate**, soaring to an impressive 86%. However, the **overall issue ratio** for domestic parcels witnessed a **slight uptick of 5.5%**.

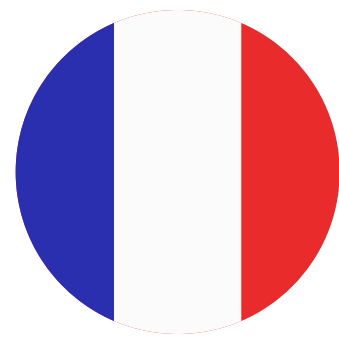
Key players in France's domestic shipping landscape encompass [Colissimo](#), [La Poste](#), [DPD France](#), and [Mondial Relay](#), each exhibiting varying performance standards in delivery speed, reliability, and customer service. As with any market, the performance of these carriers plays a pivotal role in the e-commerce sector's success, as prompt and dependable delivery services are fundamental to meeting the escalating demands of online consumers in Malaysia.

Curious to find out more about the French market? [Unlock more data here.](#)

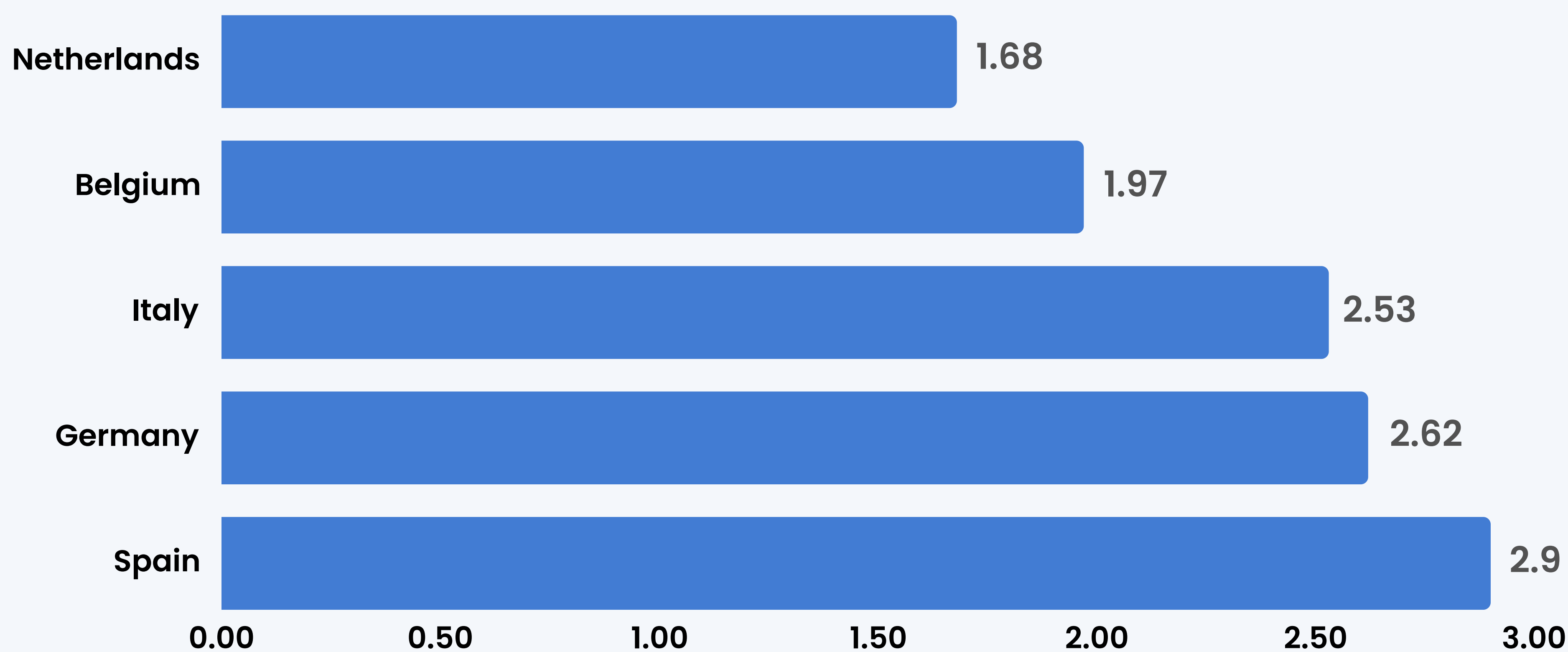
## Domestic Transit Times for the Top Carriers within France



# 04 Delivery Performance in France



Transit Times for Key International Trade Routes Originating from France



France has emerged as a significant player in Europe's cross-border e-commerce landscape, with well-established trade lanes connecting it to key markets across the continent. One of the most prominent routes is the [France-Netherlands \(FR-NL\) corridor](#), which boasts an impressive **average parcel transit time of just 1.68 days**. This efficient connection facilitates swift and seamless trade between the two countries, contributing to the overall growth of e-commerce in the region.

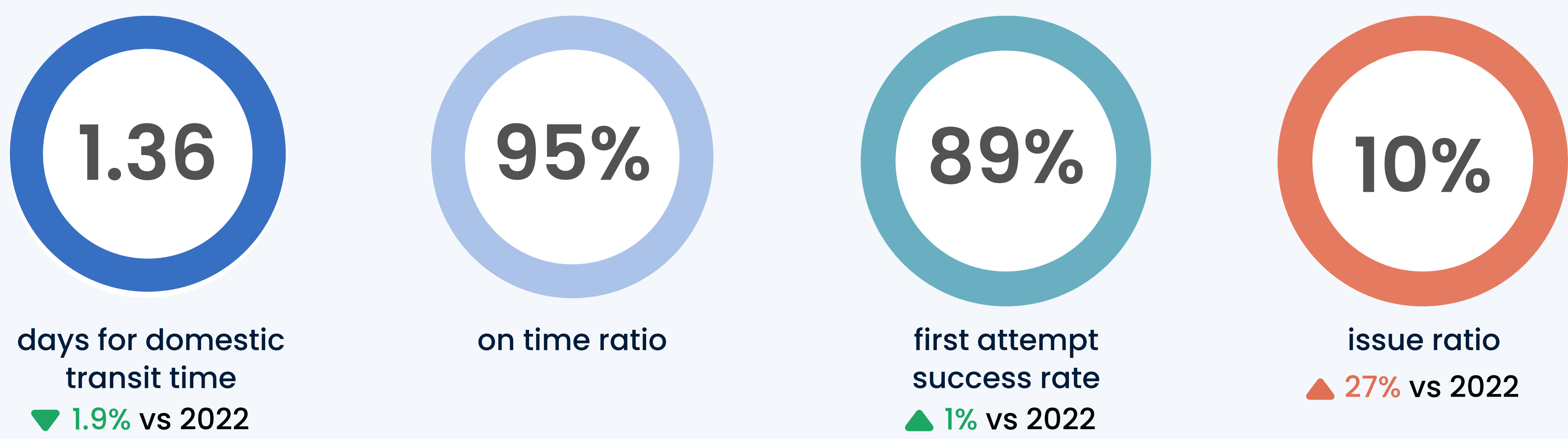
In addition to the Netherlands, France maintains strong trade lanes with other major European markets, including:

- [France to Belgium \(FR-BE\)](#): With an **average transit time of 1.97 days**, this route showcases the close geographical proximity between France and Belgium, bolstering cross-border e-commerce activities.
- [France to Italy \(FR-IT\)](#): Featuring an **average transit time of 2.53 days**, this route connects France to Italy's burgeoning e-commerce market, offering ample opportunities for businesses to expand their reach.
- [France to Germany \(FR-DE\)](#): The average **transit time for this route is 2.62 days**, enabling French e-commerce companies to tap into Germany's robust consumer market, which is poised to **reach USD 319.6 Billion by 2032**, says [Spherical Insights](#).
- [France to Spain \(FR-ES\)](#): With an **average transit time of 2.9 days**, this route solidifies France's position as a vital e-commerce hub, linking it to the rapidly-growing Spanish market, with electronics and fashion being the two largest sectors in terms of turnover.

# 04 Delivery Performance in Germany



## Germany's Logistics Performance in Numbers

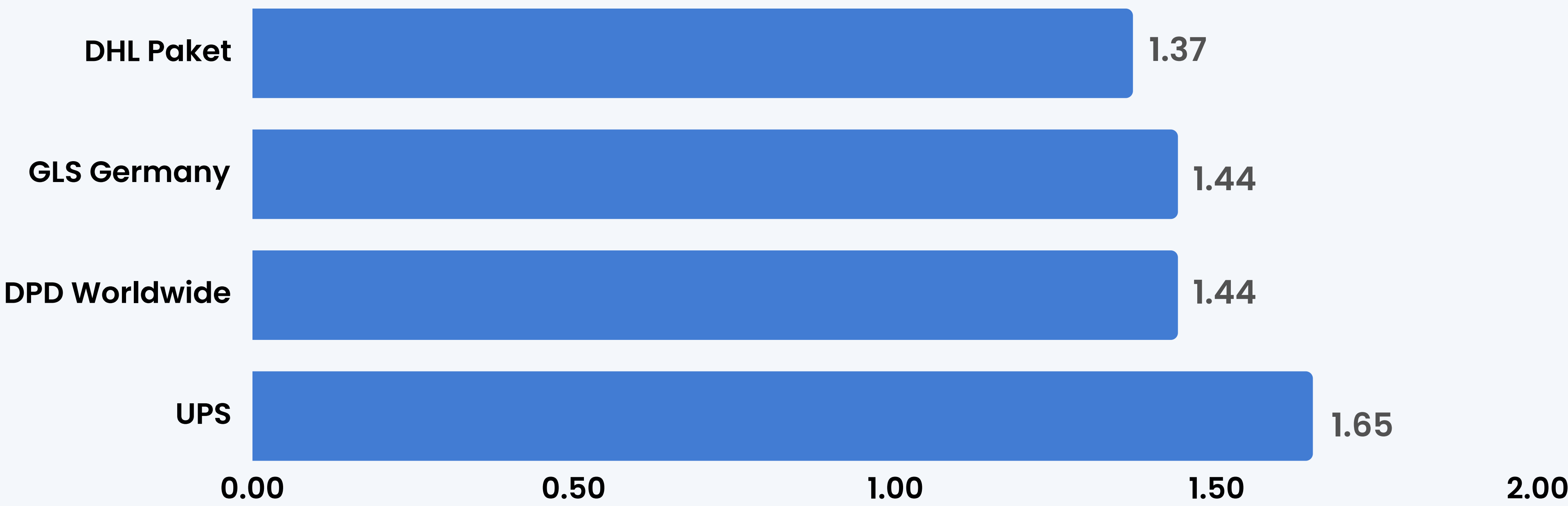


[Germany's e-commerce landscape](#) is characterized by a high level of efficiency, with an average **parcel transit time of 1.36 days**, reflecting a 1.9% improvement from 2022. The country also boasts a **95% delivery on-time ratio** and an **89% first-attempt delivery success rate**, which has seen a 1% year-over-year increase. However, the **percentage of parcels with delivery issues** (issue ratio) has increased by 27% YoY, now standing at 10%.

The [recent decline in e-commerce purchasing](#) can be primarily attributed to **consumer insecurity about their personal economic outlook**. Rising energy costs and inflation, particularly in the fast-moving consumer goods (FMCG) sector, have led to increased frugality among German consumers. On a positive note, there has been **continuous growth in the adoption of online buy now, pay later (BNPL) services** like PayPal and Klarna.

[Notable carriers](#) dominating Germany domestic shipping landscape include **CJ GLS and DHL Paket**, each offering varying levels of service in speed, reliability, and customer support.

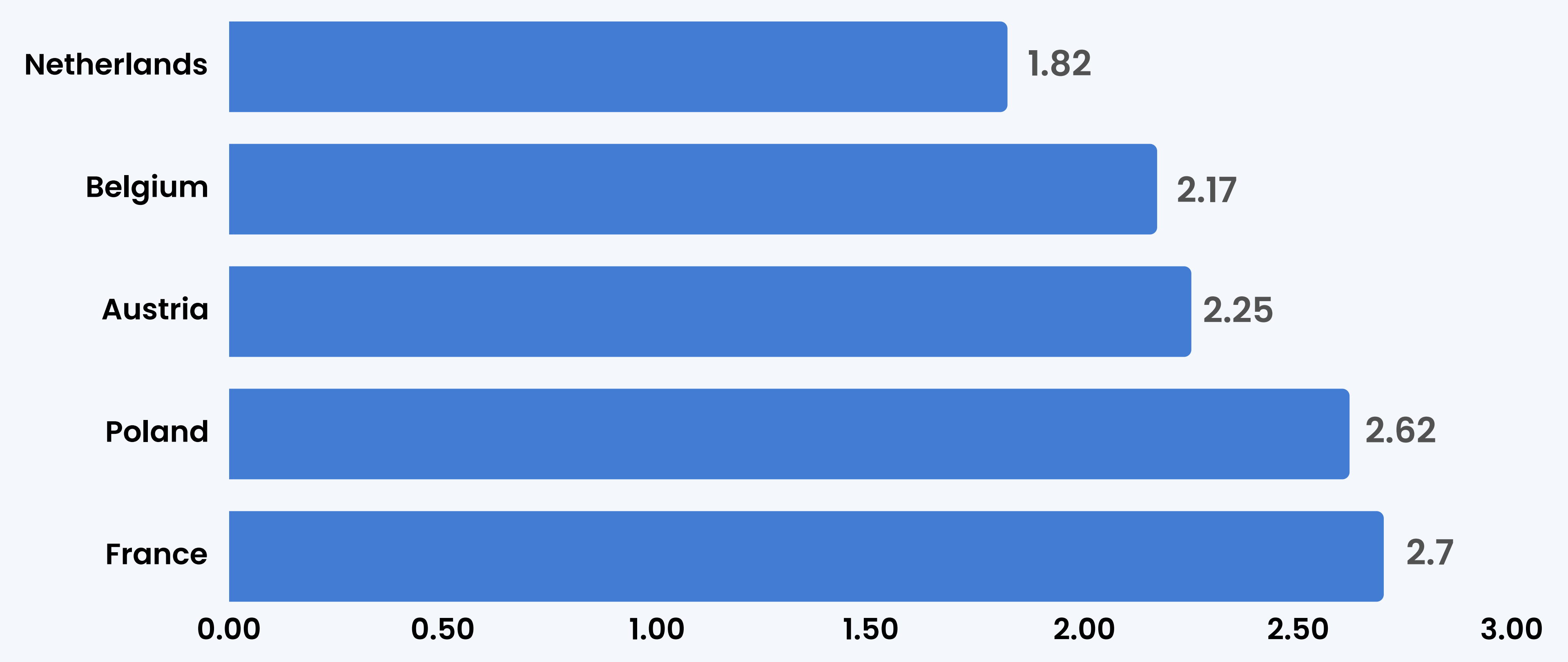
## Domestic Transit Times for the Top Carriers within Germany



# 04 Delivery Performance in Germany



Transit Times for Key International Trade Routes Originating from Germany



When it comes to international shipping routes originating from Germany, the **shortest transit time was observed in Germany-Netherlands (DE-NL) route**, with an **average of 1.82 days**. On the other hand, the **longest transit time** was surprisingly from **Germany to France (DE-FR), averaging 2.7 days**. The transit times for other routes, such as **Germany to Belgium** and Austria, fall within the **range of 2.17 to 2.62 days**, reflecting the relatively smooth logistics performance for these routes.

By understanding the transit times for key international trade routes originating from Germany, businesses in Germany can optimize their logistics strategies, improve their operational efficiency, and ultimately provide a seamless **cross-border shopping experience** for their customers around the world. Additionally, this data can inform policymaking and infrastructure development to support the growth of international trade and strengthen Germany’s position as a regional logistics hub.

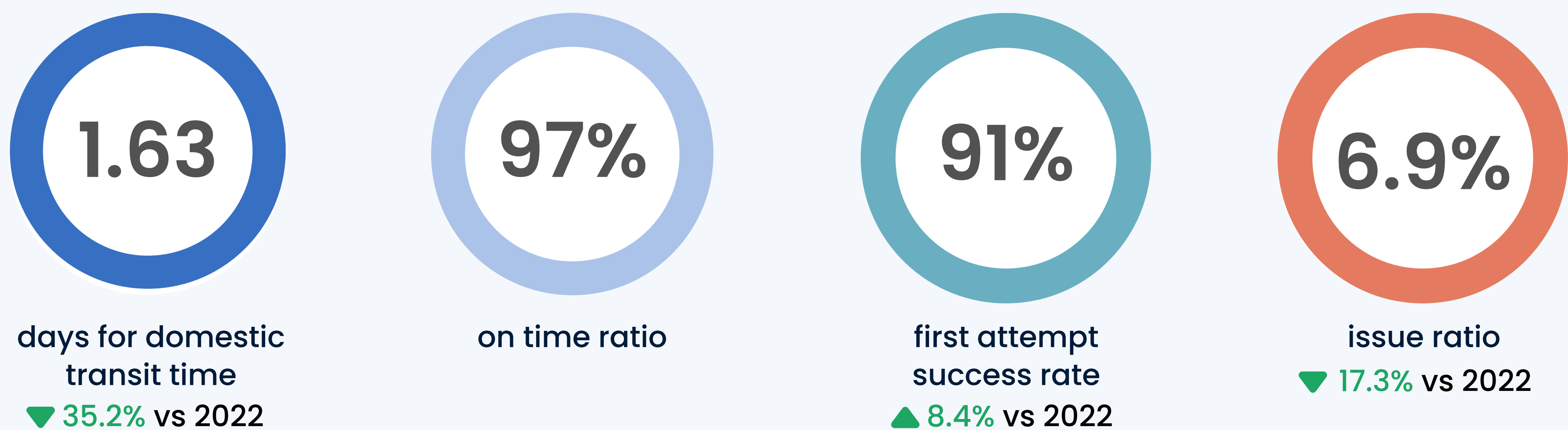
Find out which carriers are the **best options for these shipping routes**.



# 04 Delivery Performance in Italy



## Italy's Logistics Performance in Numbers

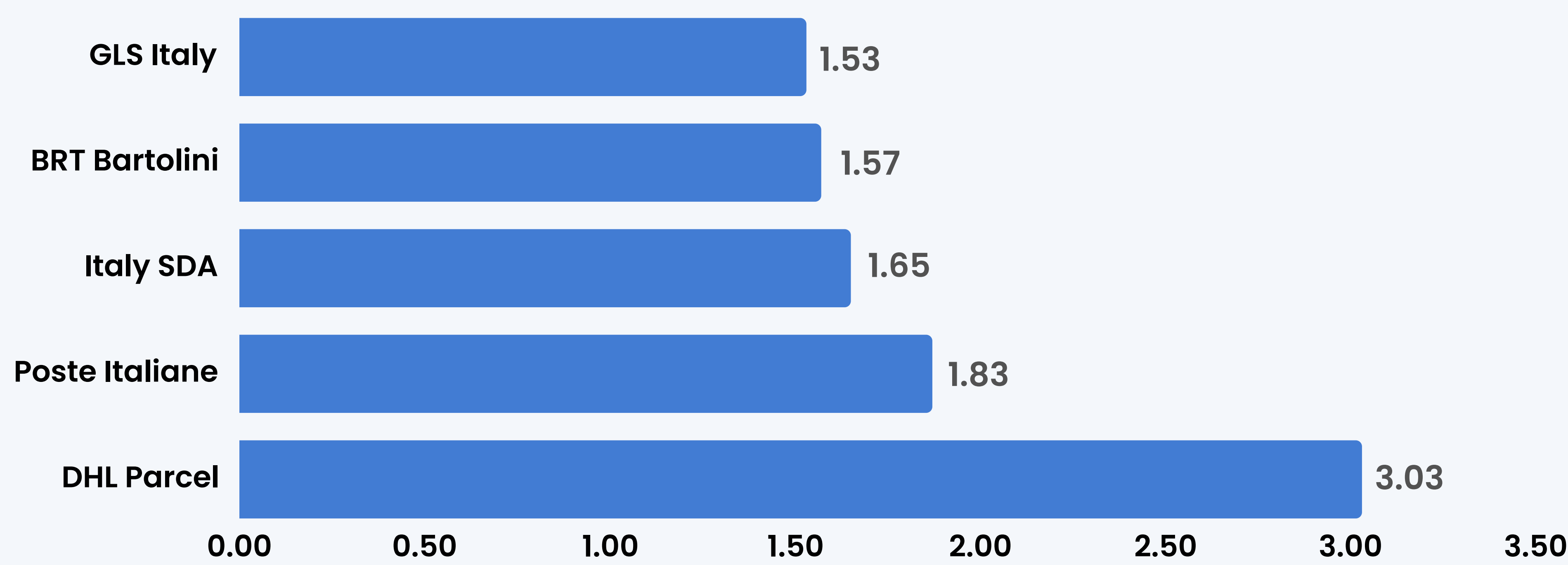


[Italy's e-commerce landscape](#) is distinguished by unique trends, namely a **strong preference for local brands** and a **heightened focus on sustainability**. Companies like Amazon and GLS Italy are spearheading sustainable initiatives, such as employing **electric vehicles for last-mile delivery** and utilizing **bike couriers for urban deliveries**.

In terms of delivery performance, Italy's **domestic parcel transit times** averaged an impressive **1.63 days in 2023**, marking a 35.2% improvement from the previous year. The **first-attempt delivery success rate** also rose by 8.4% from 2022, **reaching a remarkable 91%**. Similarly, the **issue ratio** improved by 17.3%, decreasing to **6.9% in 2023**. Top carriers for domestic shipping in Italy, such as [GLS Italy](#), [BRT Bartolini](#), [Italy SDA](#), and [DHL Parcel](#), play a critical role in the country's e-commerce logistics performance, varying based on factors such as delivery speed, reliability, and customer service.

Curious to find out more about the Italian e-commerce market? [Unlock more data here.](#)

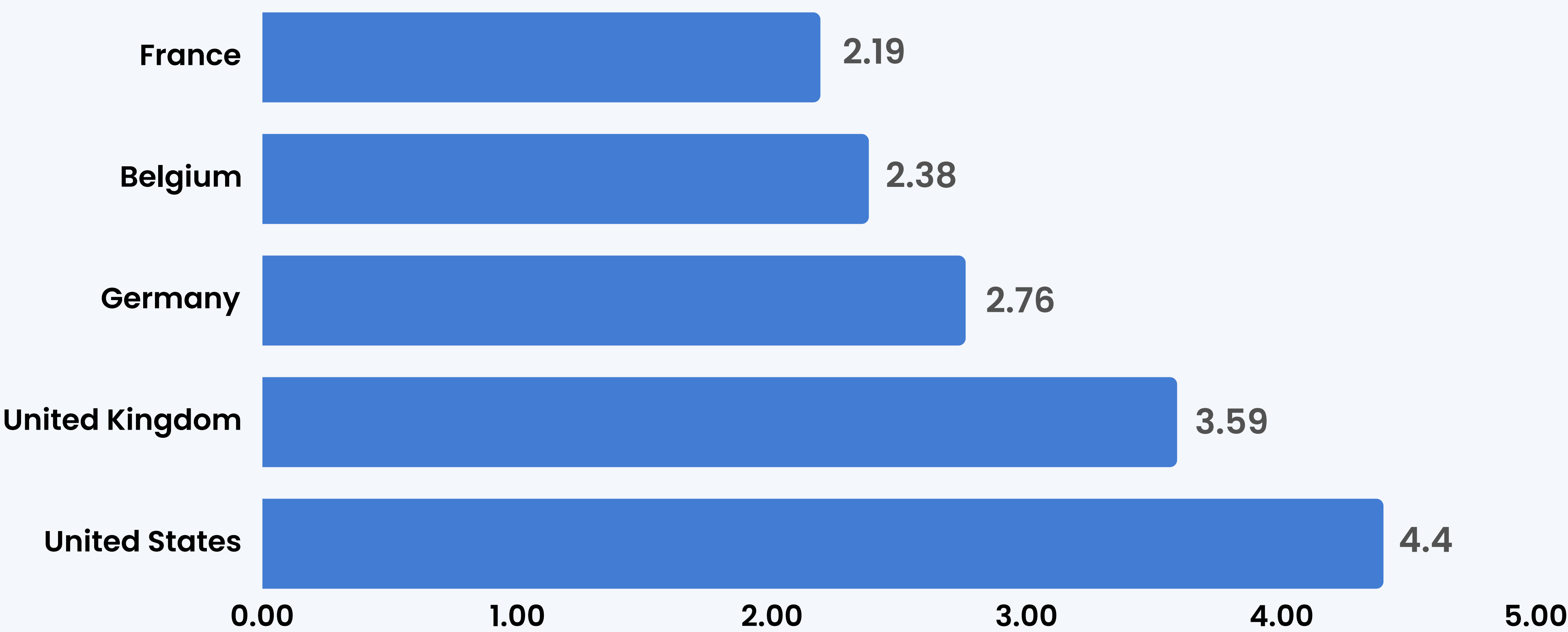
## Domestic Transit Times for the Top Carriers within Italy



# 04 Delivery Performance in Italy



Transit Times for Key International Trade Routes Originating from Italy



Cross-border business-to-consumer (B2C) e-commerce has gained significant traction in Italy's online retail sector. In 2019, e-commerce websites from foreign countries accounted for just [28.7% of the entire e-commerce revenue](#). By **2022**, the **market share of cross-border e-commerce had increased to 39.2%**, indicating a growing preference for international online shopping among Italian consumers.

Among the key international trade routes, the [Italy-United States \(IT-US\) route](#) had the **longest average parcel transit time of 4.4 days in 2023**. This relatively longer transit time can be attributed to the vast geographical distance between Italy and [the United States](#), as well as potential challenges in customs clearance, shipping routes, and delivery processes.

In contrast, other international trade routes exhibited shorter transit times, namely:

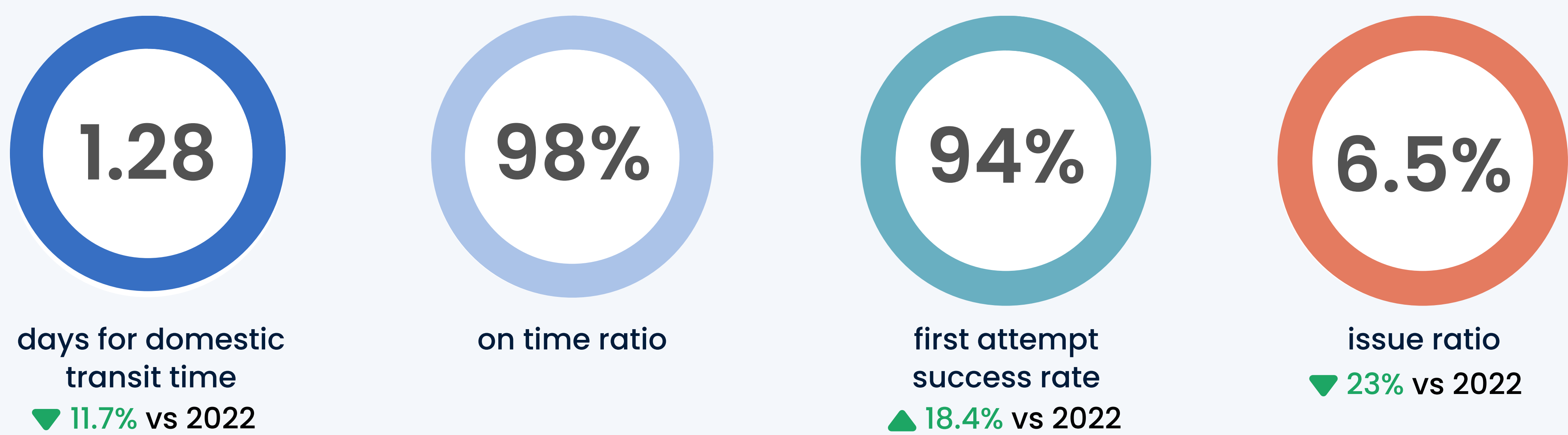
- [Italy to France](#) (IT-FR) route: 2.19 days
- [Italy to Belgium](#) (IT-BE) route: 2.38 days
- [Italy to Germany](#) (IT-DE) route: 2.76 days
- [Italy to United Kingdom](#) (IT-GB) route: 3.59 days

These shorter transit times can be attributed to the **well-established trade relationships**, **more efficient customs procedures**, and **shorter geographical distances** between Italy and the respective European countries. As cross-border e-commerce continues to grow in Italy, optimizing transit times will be crucial to meeting consumer expectations and maintaining competitiveness in the global e-commerce landscape.

# 04 Delivery Performance in United Kingdom



## United Kingdom's Logistics Performance in Numbers

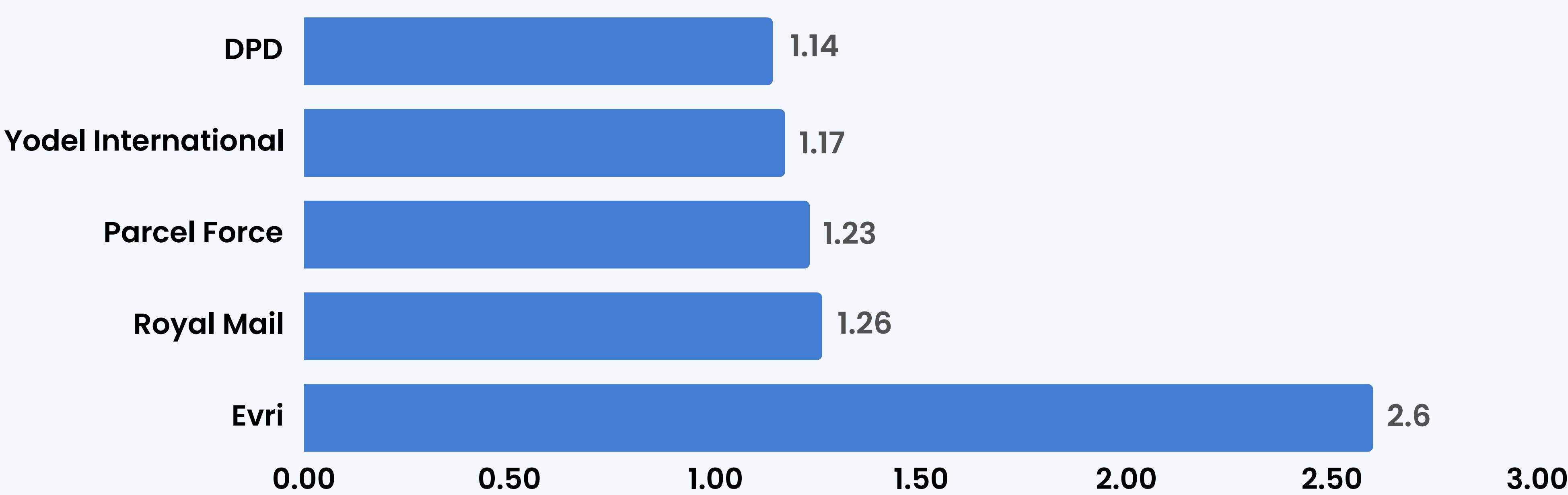


In 2023, the [United Kingdom's e-commerce market](#) witnessed substantial year-over-year improvements in several key delivery performance metrics. The **transit time for domestic parcels improved by 11.7%** compared to 2022, **averaging just 1.28 days**. The **first-attempt delivery success rate** also saw a commendable **increase of 18.4% to 94%**, while the **on-time delivery ratio reached an impressive 98%**, surpassing the performance of the other countries mentioned in this report. Last but not least, the **overall issue ratio** for domestic parcels **decreased by 23% to 6.5% in 2023**, indicating a significant enhancement in the efficiency and reliability of e-commerce logistics in the UK.

Prominent carriers, such as [DPD](#), [Yodel International](#), [Parcel Force](#), [Royal Mail](#), and [Evri](#), are instrumental in upholding these high standards. However, it is critical to recognize that there is always room for improvement, as **carrier-related challenges contributed to about 21.9% of the total issues** encountered within the e-commerce logistics sector in the UK.

Curious to find out more about the UK market? [Unlock more data here.](#)

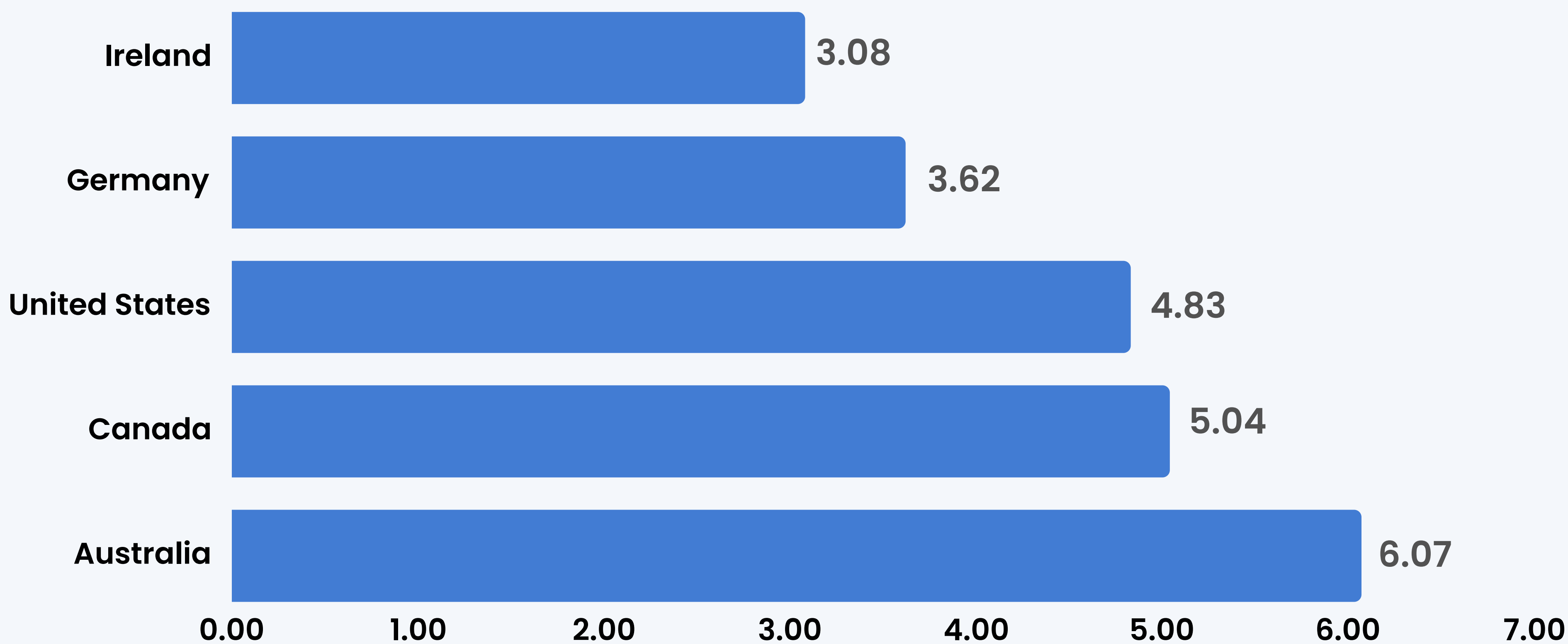
## Domestic Transit Times for the Top Carriers within UK



# 04 Delivery Performance in United Kingdom



Transit Times for Key International Trade Routes Originating from UK

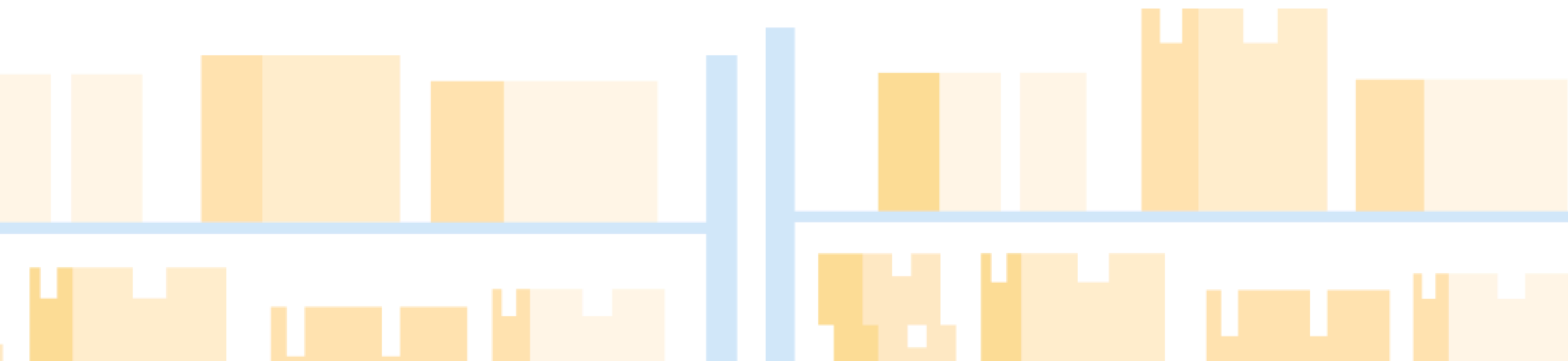


Boasting a strategic location and a thriving economy, the UK is ideally positioned to serve as a hub for cross-border trade, linking businesses and consumers with global markets.

Several key cross-border trade routes originate from the UK, and the efficiency of these routes is critical to the growth of e-commerce. Among these routes, the GB-IE ([UK to Ireland](#)) route stands out with the **shortest average transit time of just 3.08 days**. However, it's important to note that transit times have been severely impacted since COVID-19. Despite its advantageous location, the numbers have seen a decline over the years, reflecting the challenges posed by the pandemic on global logistics.

Other significant trade routes originating from the UK include:

- [UK to Germany](#) (GB-DE) route: 3.62 days
- [UK to United States](#) (GB-US) route: 4.83 days
- [UK to Canada](#) (GB-CA): 5.04 days
- [UK to Australia](#) (GB-AU): 6.07 days

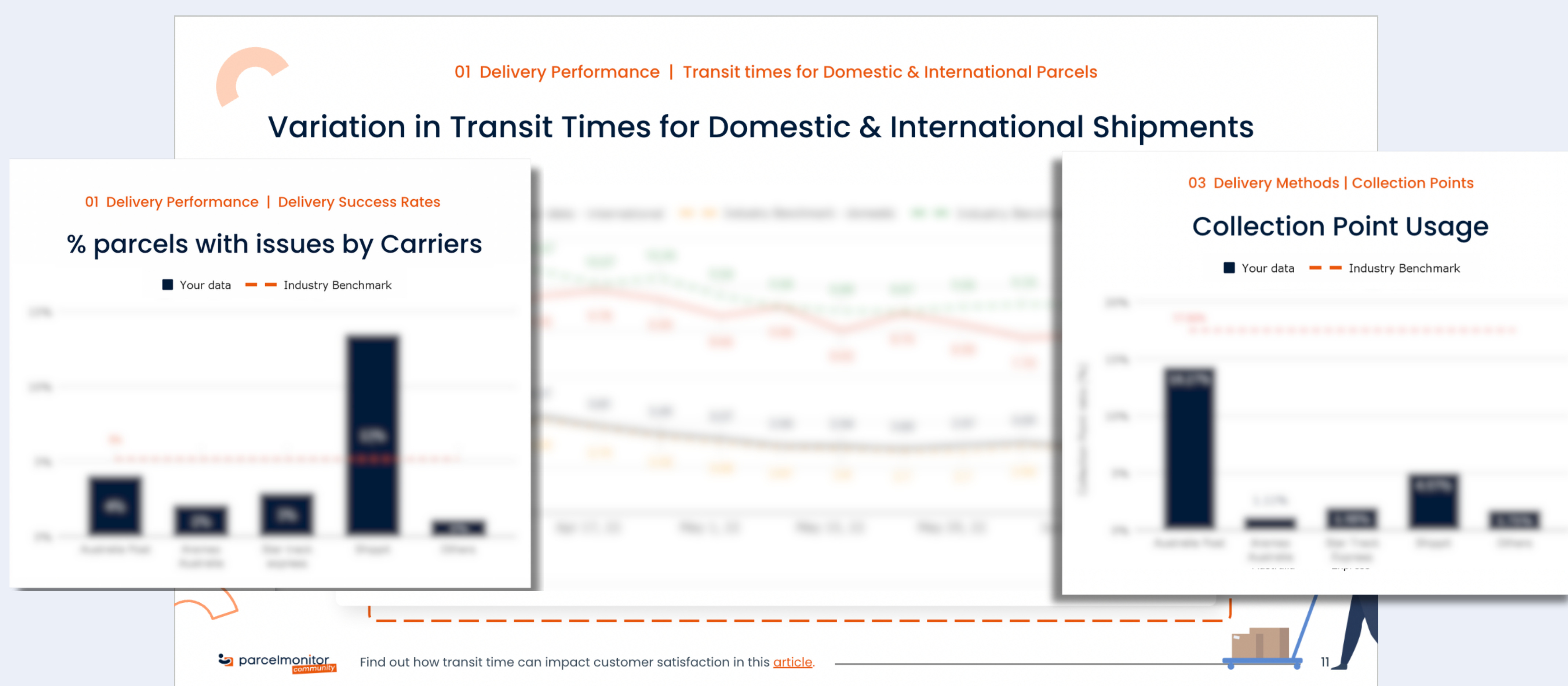


## 05 Closing Remarks

In conclusion, our report has provided a comprehensive overview of e-commerce landscape in Europe, including a recap of delivery issues in 2023, and the breakdown of delivery performance metrics in 4 key European markets. As we navigate the ever-evolving digital age, where consumer expectations continue to shift and innovations continually emerge, we trust that the insights shared in this report will empower retailers, e-commerce businesses, logistics companies, and industry professionals with the knowledge needed to make informed decisions and steer the course of e-commerce logistics in Europe.

**The Parcel Monitor Team**

## Looking for more data insights?



**Discover growth opportunities & make data driven decisions with:**

- ✓ Peak season performance benchmarks
- ✓ On-time delivery performance
- ✓ Delivery success rates...and more!

**FIND OUT MORE ABOUT OUR DATA**

## Trusted Source of E-Commerce Logistics Data

Initiated by e-commerce logistics enthusiasts at Parcel Perform, and powered by end-consumers, Parcel Monitor is **your gateway to real e-commerce logistics data worldwide.**



## For Businesses of All Sizes

Companies leverage our market data and benchmarking reports to derive actionable insights into **170+ countries** while forming meaningful collaborations across the industry.



## For Consumers Around the World

Millions of consumers rely on our free parcel tracking to monitor the status of their parcels **across 1045+ logistics carriers** globally on a single platform.



## About Parcel Monitor

Parcel Monitor is the trusted source of e-commerce logistics insights – powered by real consumer data. Leveraging proprietary data and latest technologies, we empower businesses with actionable insights, while facilitating collaborations across the entire e-commerce logistics ecosystem.

With a global network spanning **1045+ carriers, 170+ countries and 60,000+ shipping routes**, we track **millions of parcels on a daily basis**, providing an accurate reflection of the global markets.