



THE ECONOMIC VALUE OF THE EUROPEAN EXPRESS INDUSTRY

2020 update, Rob Harbron, Oxford Economics

October 2020





IN THIS SESSION:

TRENDS IN EXPRESS DELIVERY

SURVEY OF EXPRESS DELIVERY USERS

**ECONOMIC IMPACT OF EUROPEAN EXPRESS
INDUSTRY**

A large white semi-truck with a red stripe is driving on a multi-lane highway. The truck is in the left lane, moving away from the viewer. The road has white lane markings. In the distance, other vehicles and a highway sign are visible. The sky is overcast with grey clouds.

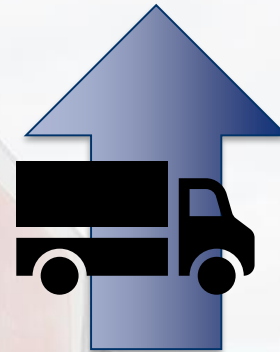
TRENDS IN EXPRESS DELIVERY

EXPRESS DELIVERY A STRONG SOURCE OF EUROPEAN GROWTH IN RECENT YEARS, FAR OUTPACING OVERALL ECONOMY



**Eurozone GDP up
13% in nominal
terms over
2014-2018**

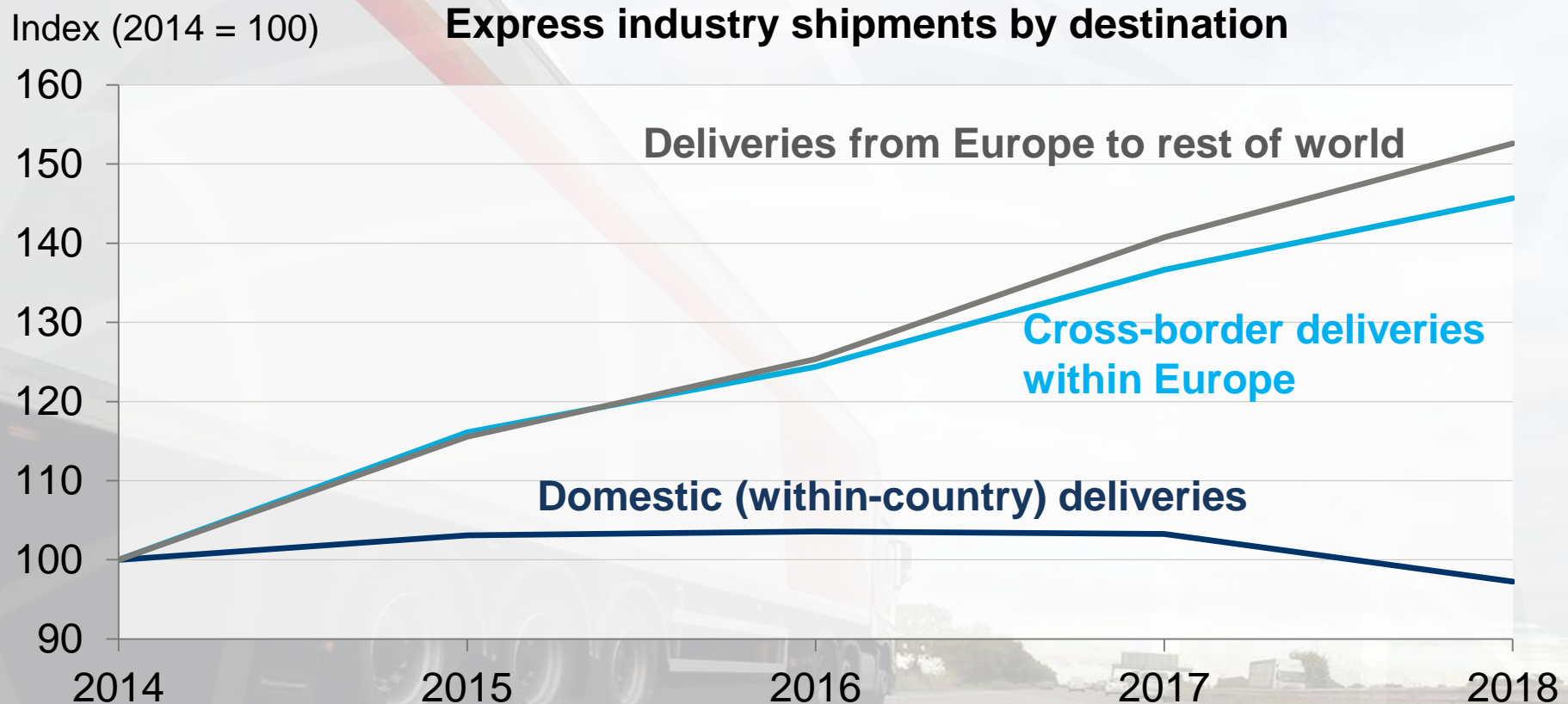
Source: EEA



**Express industry
revenues up 26%
over same period
(2014-2018)**

Source: Eurostat

CROSS-BORDER DELIVERIES A KEY SOURCE OF GROWTH FOR THE EXPRESS INDUSTRY



Source: EEA

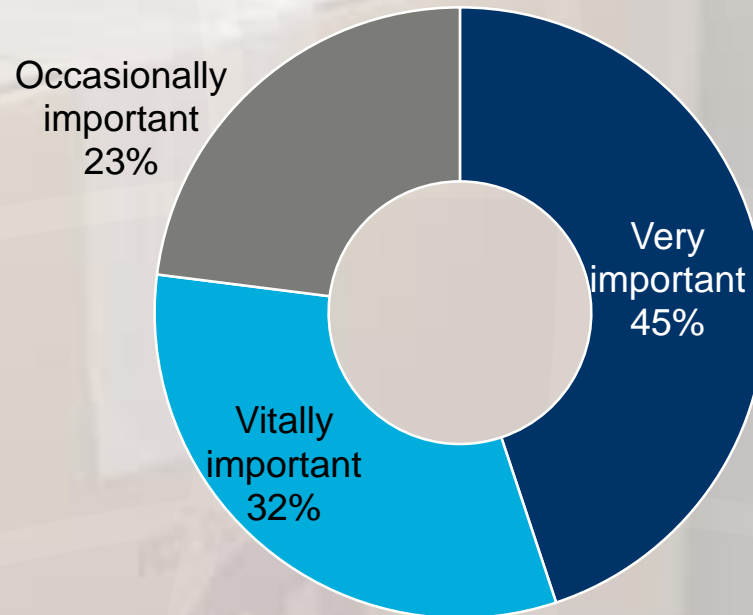
A large white semi-truck with a red stripe is driving on a multi-lane highway. The truck is in the left lane, moving away from the viewer. The road has white lane markings. In the distance, other vehicles and a highway sign are visible. The sky is overcast with grey clouds.

SURVEY OF EXPRESS DELIVERY USERS

EXPRESS DELIVERY IS A CRITICAL PART OF BUSINESS PRACTICES FOR CUSTOMERS OF THE INDUSTRY

How important are express services to your business?

Share of total



CUSTOMERS USE EXPRESS DELIVERY FOR A DIVERSE RANGE OF REASONS, FROM SPEED TO GLOBAL REACH

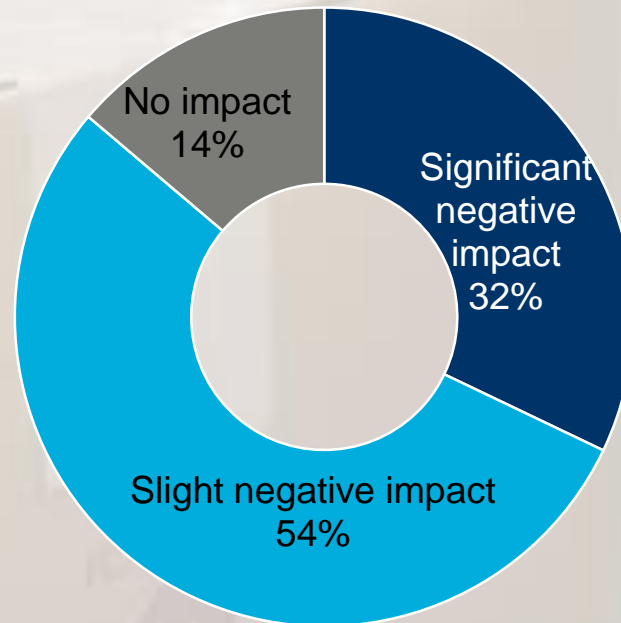
What are the main reasons your organisation uses express industry services? (respondents can select multiple answers)

Share of respondents



EXPRESS DELIVERY CUSTOMERS OFTEN RELY ON THE INDUSTRY TO THE EXTENT THEIR BUSINESS DEPENDS ON IT

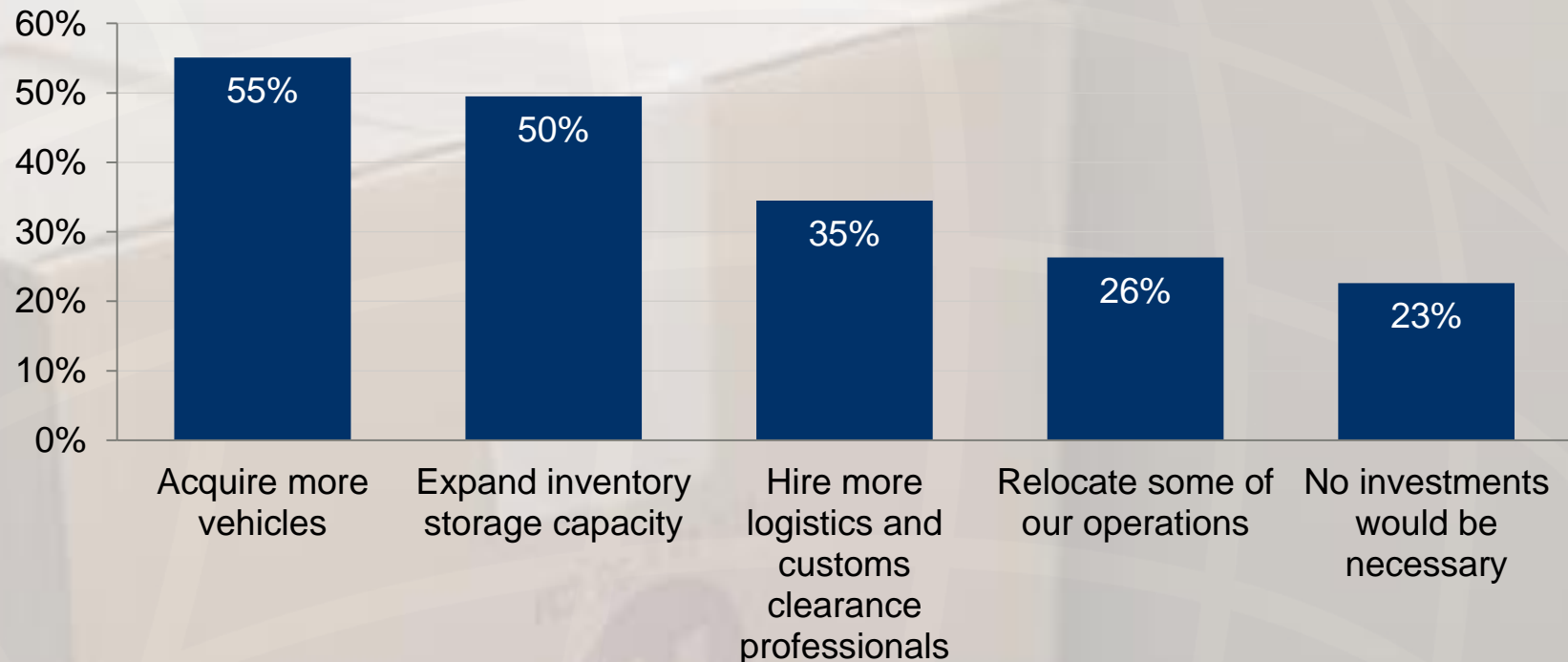
What would the impact be on your business if express delivery services were not available?



THE EXPRESS INDUSTRY PROVIDES A SERVICE THAT TO REPLACE WOULD NEED SIGNIFICANT INVESTMENT AT THE FIRM LEVEL

If you had no access to express deliveries, what type of investments would your business have to make, if any?

Share of respondents



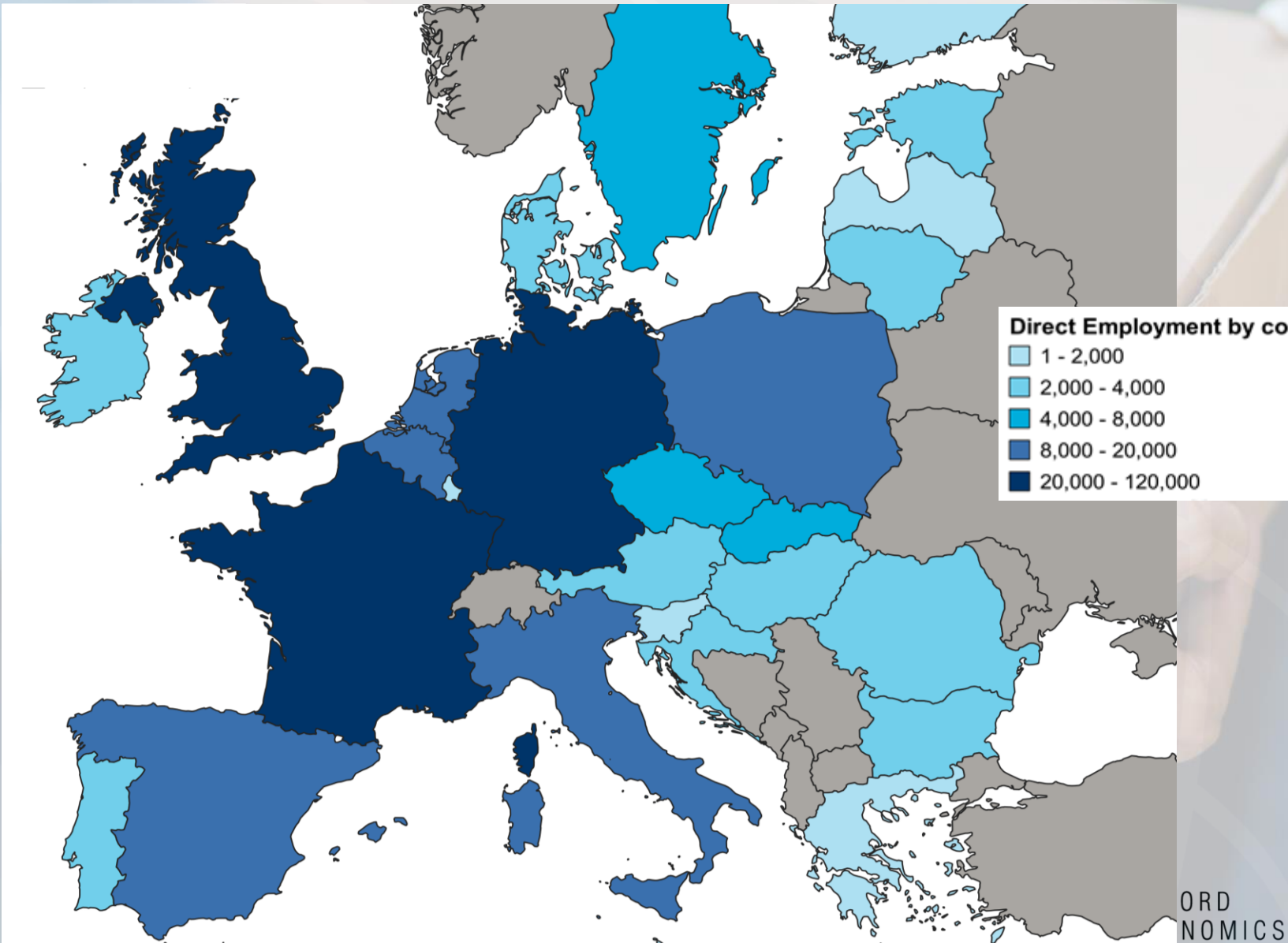
A large white semi-truck with a red stripe is driving on a multi-lane highway. The truck is in the left lane, moving away from the viewer. The road stretches into the distance with other vehicles visible. The sky is overcast with grey clouds. A white rectangular box is overlaid on the upper left portion of the image, containing the title text.

ECONOMIC IMPACT OF EUROPEAN EXPRESS INDUSTRY

Direct Employment by country

Lightest Blue	1 - 2,000
Light Blue	2,000 - 4,000
Medium Blue	4,000 - 8,000
Dark Blue	8,000 - 20,000
Darkest Blue	20,000 - 120,000

ORD
NOMICS

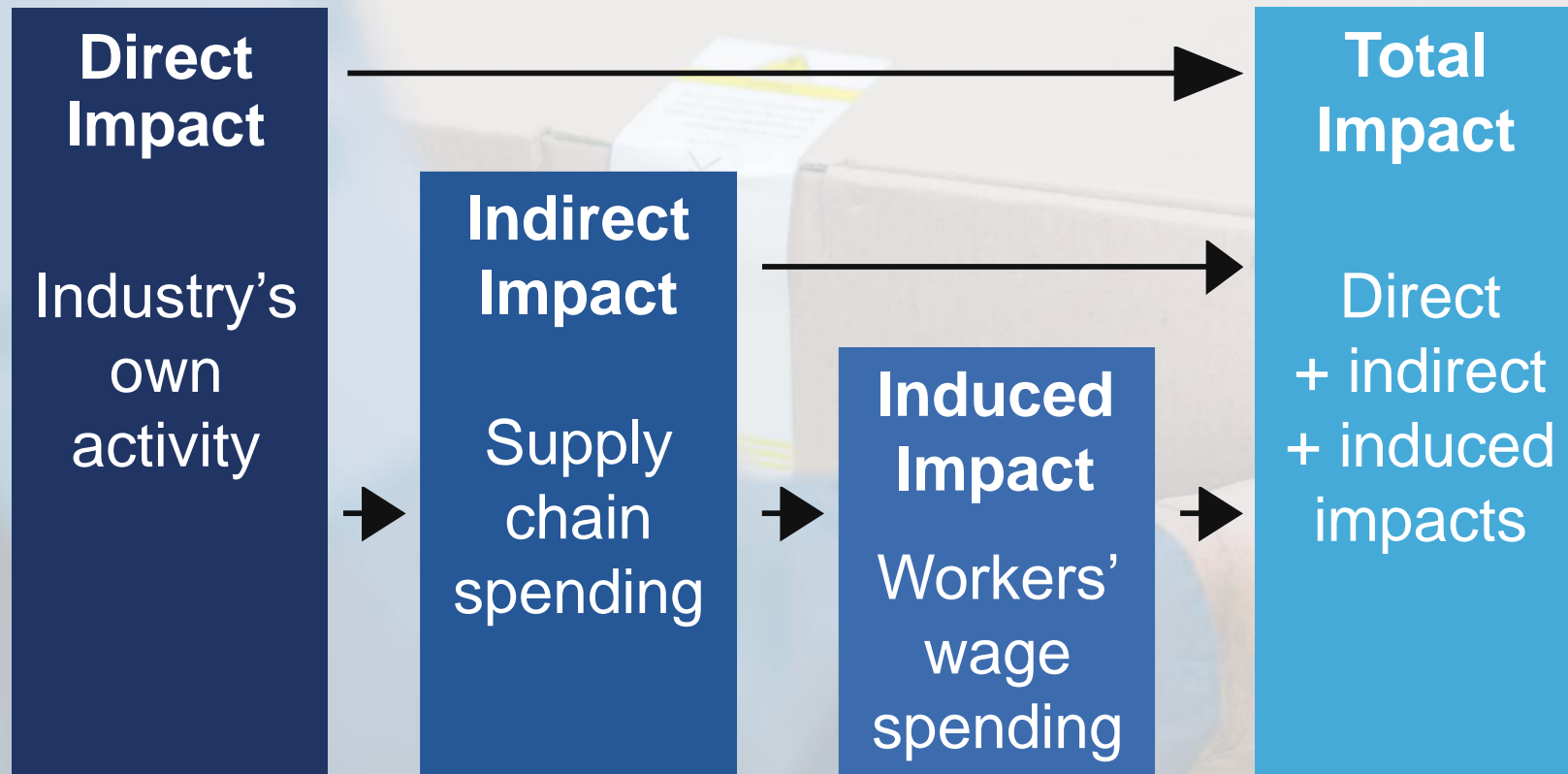


EACH WORKER IN THE EXPRESS INDUSTRY CONTRIBUTES A SIGNIFICANT AMOUNT OF ECONOMIC OUTPUT

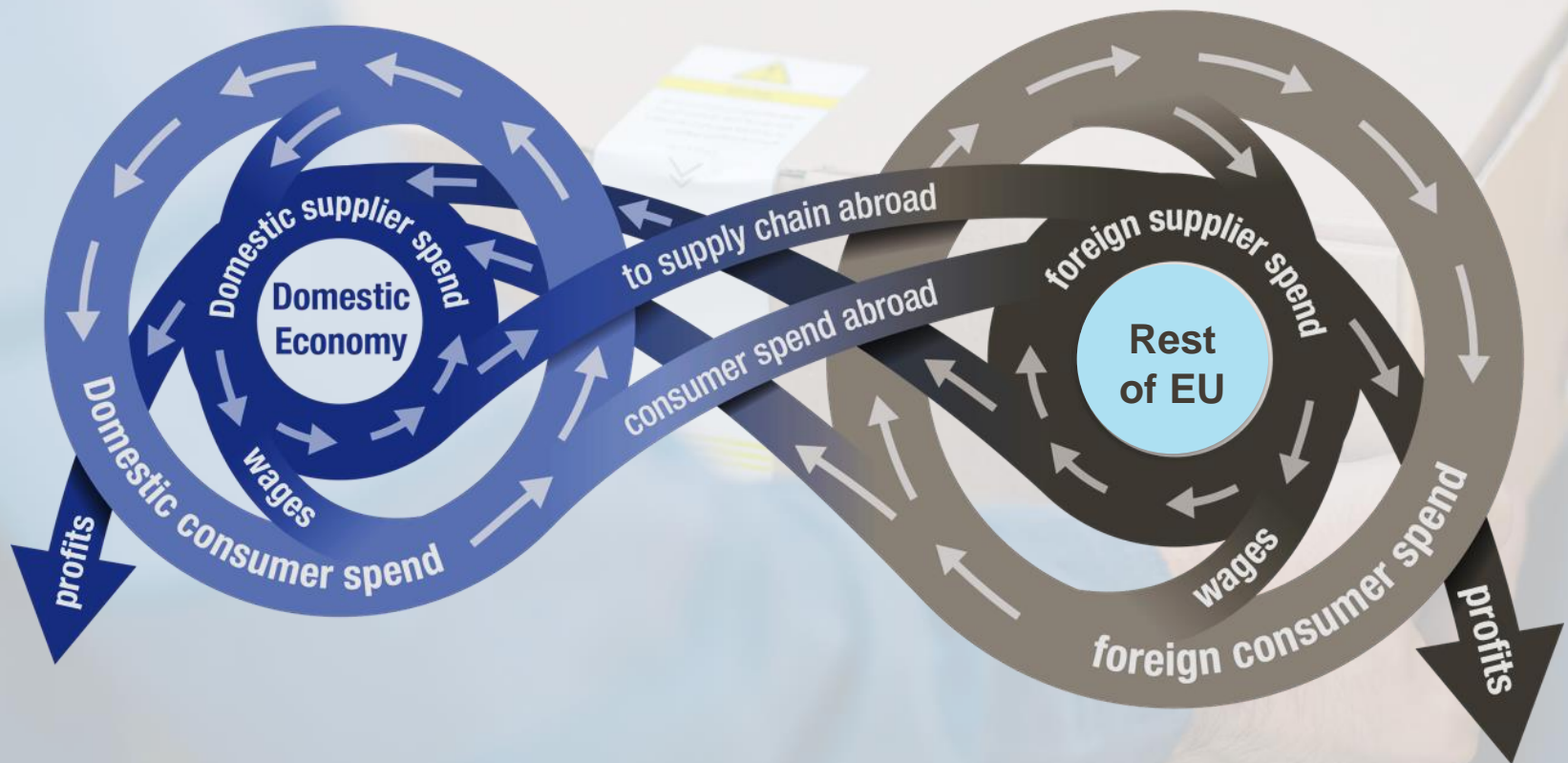
GVA per worker (labour productivity) in European express industry versus other sectors, 2018



WE ESTIMATE THE ECONOMIC IMPACT OF THE EUROPEAN EXPRESS INDUSTRY ACROSS THREE CHANNELS



WE TRACK THE ECONOMIC FLOWS BETWEEN EUROPEAN COUNTRIES



IN TOTAL, THE EUROPEAN EXPRESS INDUSTRY CONTRIBUTES €69 BILLION TO THE EU ECONOMY...

Total GDP contribution of the European express industry, 2018

Direct



€20bn

Indirect



€25bn

Induced



€24bn

**=
€69 billion**

...AND SUPPORTS OVER 1 MILLION JOBS AROUND THE EU.

Total GDP contribution of the European express industry, 2018

Direct



€20bn

Indirect



€25bn

Induced



€24bn

**=
€69 billion**

Total job supported by the European express industry, 2018



330k



410k



350k

**=
1.1m jobs**

TO FINISH, SOME COMMENTS FROM EXPRESS INDUSTRY CUSTOMERS

“The usage of express delivery is very influential in competing within our sector and maintaining better customer relationships.”

Medium-sized wholesaler, Belgium

“It is important for our company to deliver our products to far-flung areas.”

Large capital equipment manufacturer, Finland

“To save our time, finances and also to ease customer pressure, use of express delivery is a necessary part of our business.”

Very large retailer, France

“The adoption of the express delivery platform allows us to expand our opportunities.”

Large finance & insurance firm, Cyprus

“We need express delivery services for its range as its services cover all kinds of delivery locations.”

Small financial services firm, Germany