



# THE ECONOMIC VALUE OF THE EUROPEAN EXPRESS INDUSTRY

2020 update, Rob Harbron, Oxford Economics

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## **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 sky is overcast with grey clouds. In the distance, other vehicles and highway signs are visible.

# TRENDS IN EXPRESS DELIVERY

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

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

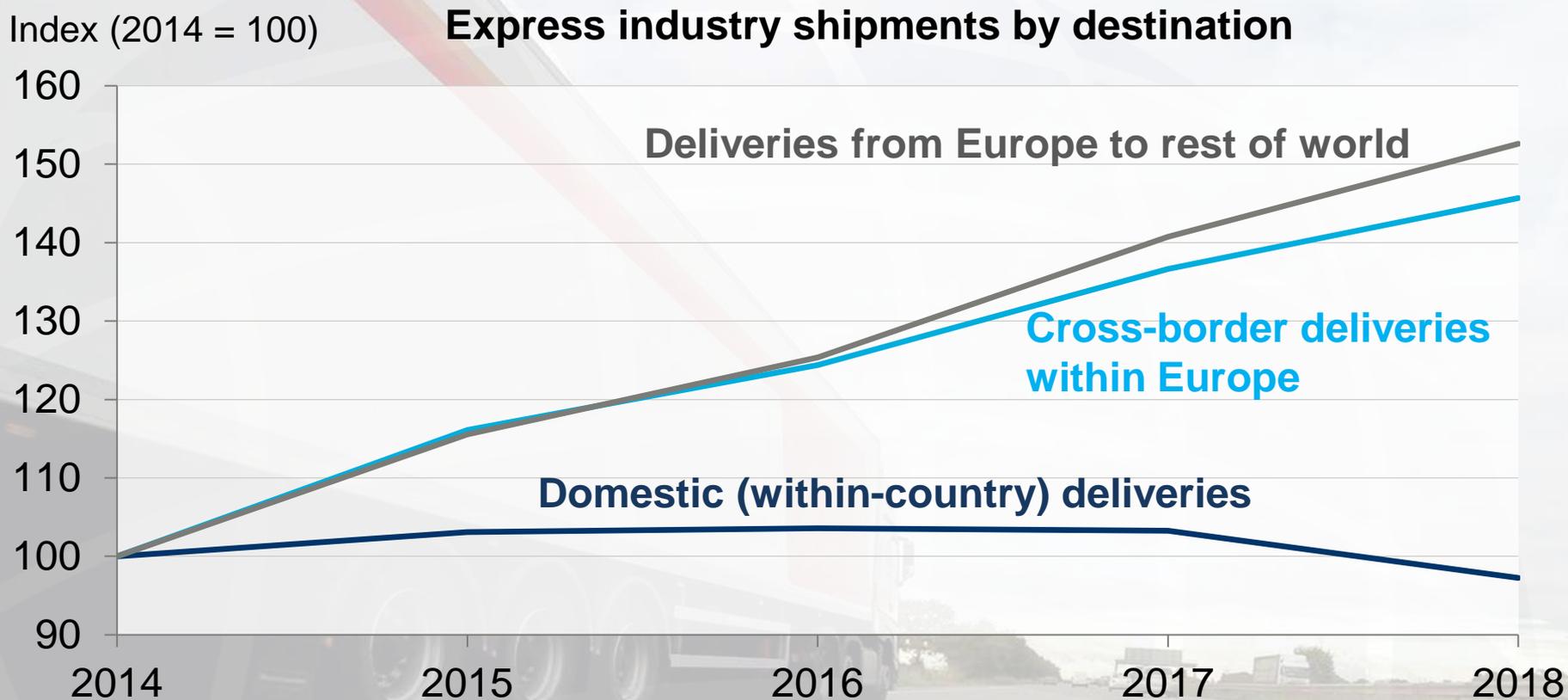
Source: EEA



**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



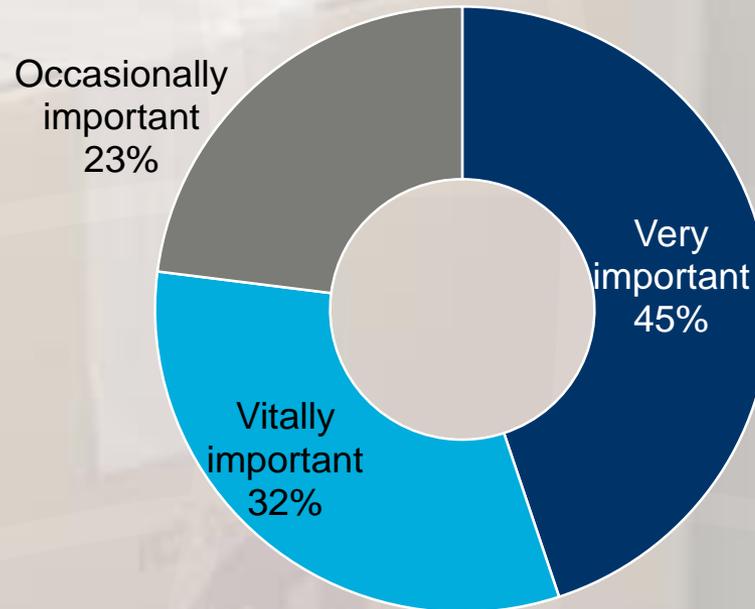
# **SURVEY OF EXPRESS DELIVERY USERS**

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

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## 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)

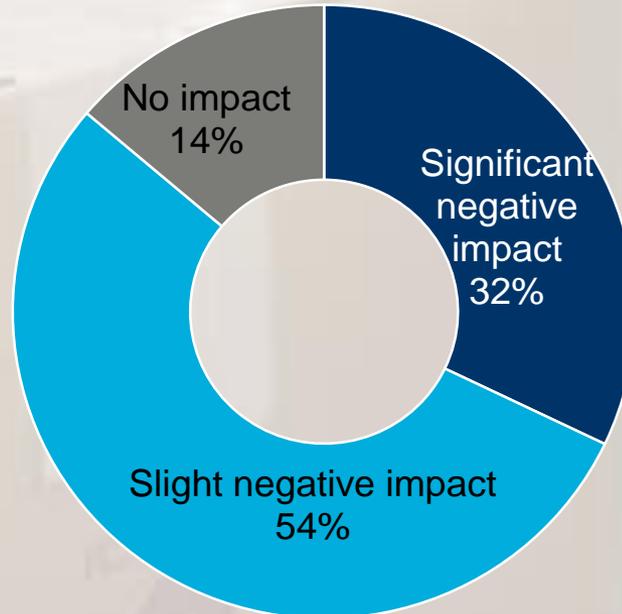
Share of respondents



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

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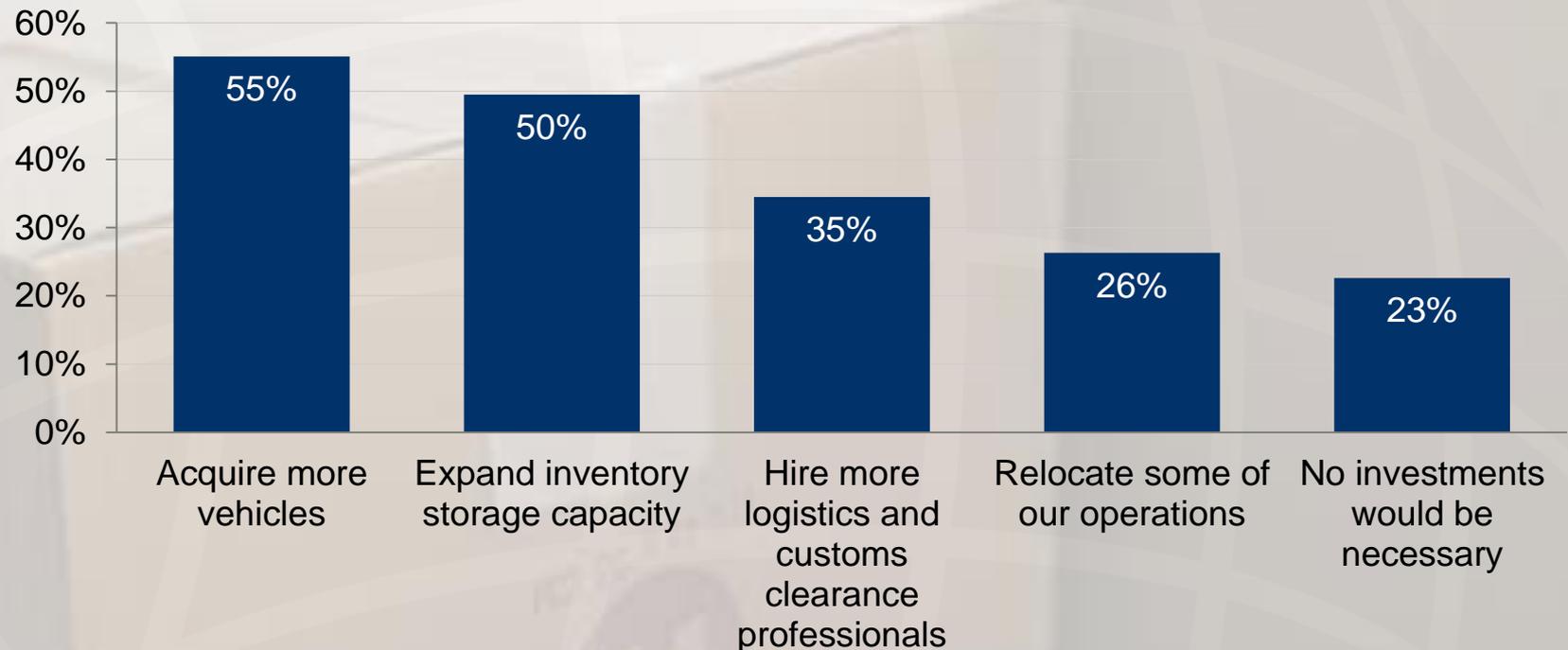
**What would the impact be on your business if express delivery services were not available?**



## 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?

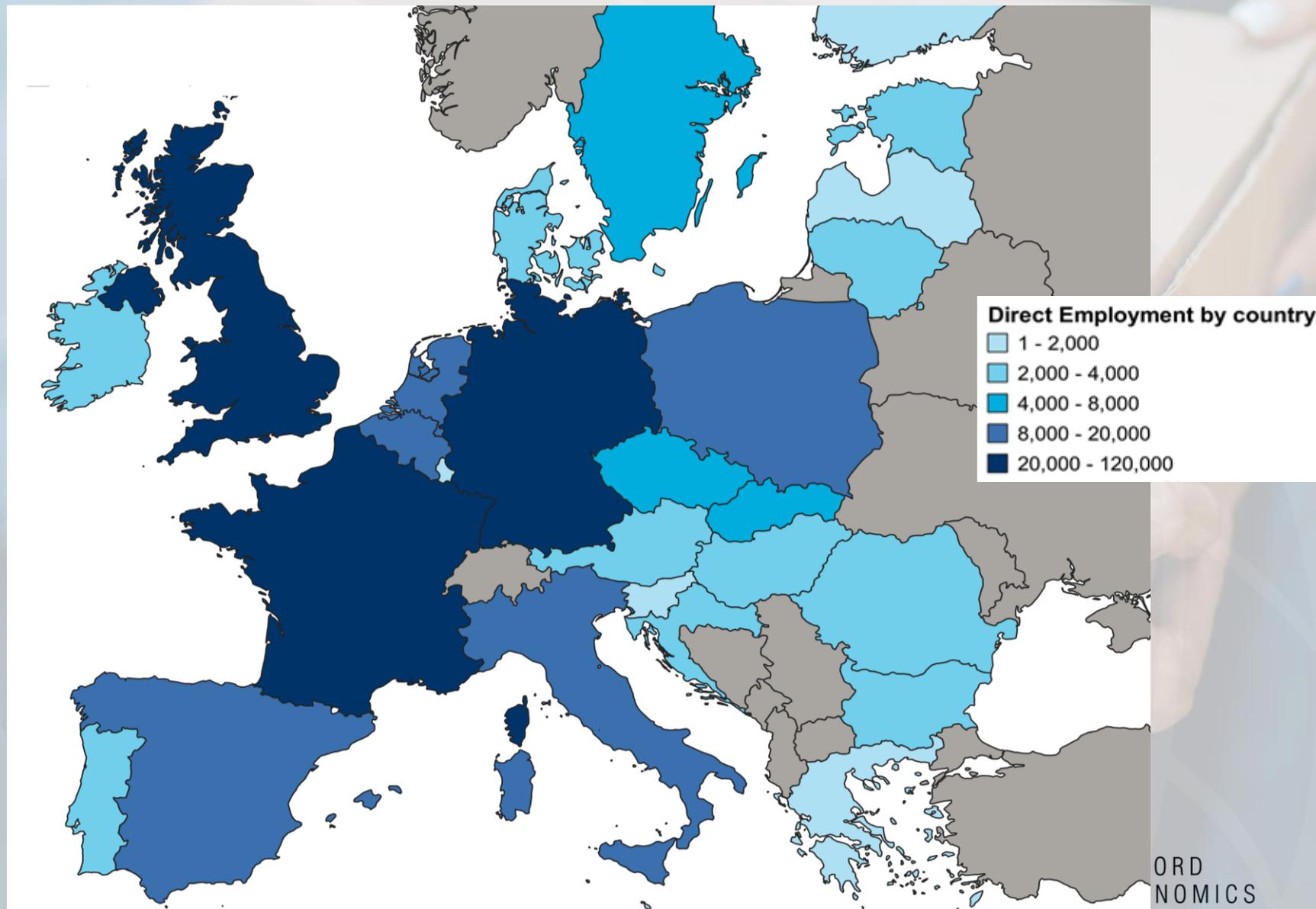
Share of respondents





# **ECONOMIC IMPACT OF EUROPEAN EXPRESS INDUSTRY**

# THE INDUSTRY DIRECTLY EMPLOYS 330,000 PEOPLE ACROSS THE CONTINENT

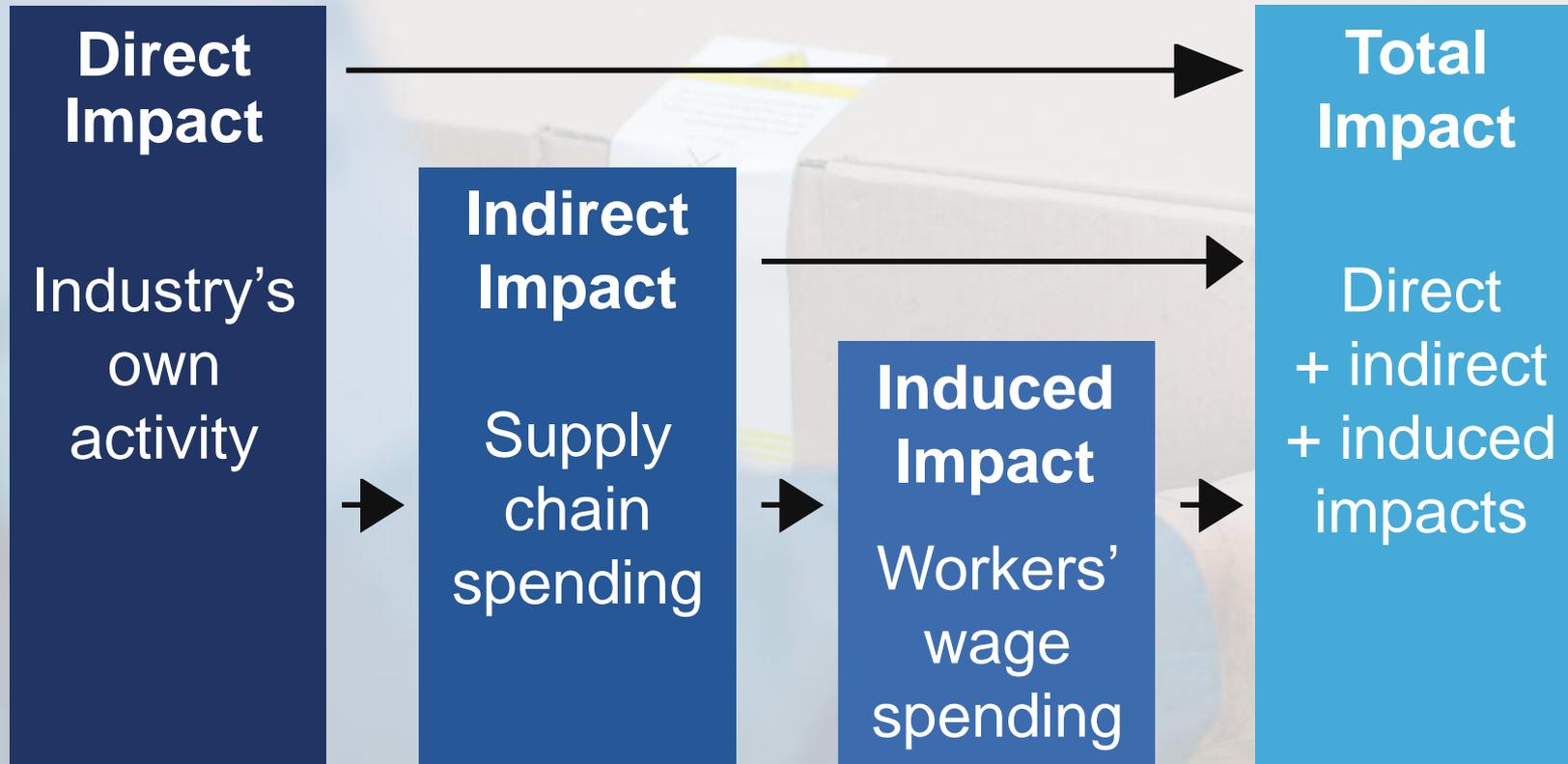


# EACH WORKER IN THE EXPRESS INDUSTRY CONTRIBUTES A SIGNIFICANT AMOUNT OF ECONOMIC OUTPUT

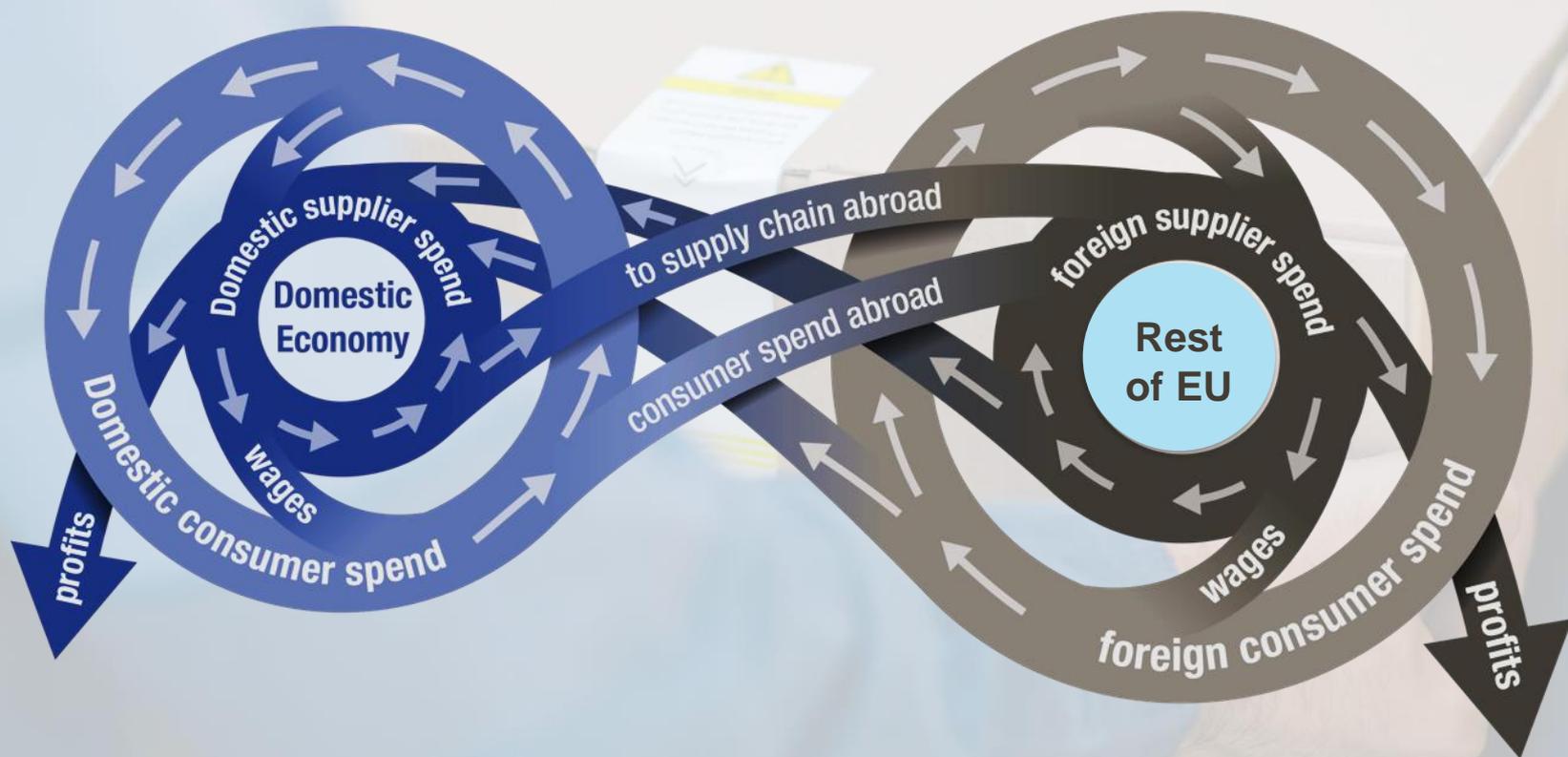
GVA per worker (labour productivity) in European express industry versus other sectors, 2018



# 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**

**Total job supported by the European express industry, 2018**

**Direct**



€20bn



330k

**Indirect**



€25bn



410k

**Induced**



€24bn



350k

**=  
€69 billion**

**=  
1.1m jobs**

## TO FINISH, SOME COMMENTS FROM EXPRESS INDUSTRY CUSTOMERS

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*“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**