



An Coimisiún um
Rialáil Cumarsáide
Commission for
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Parcel data for Ireland 2018 - 2021

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Commission for Communications Regulation

1 Lárcheantar na nDugaí, Sráid na nGildeanna, BÁC 1, Éire, D01 E4X0.
One Dockland Central, Guild Street, Dublin 1, Ireland, D01 E4X0.
Teil | Tel +353 1 804 9600 Suíomh | Web www.comreg.ie

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1: Executive Summary

1. This report shares data on Irish parcels for the years 2018 – 2021, based on the data collected under the European Cross Border Parcel Regulation (“CBPR”). CBPR data collected is from 7 declared Parcel Delivery Service Providers (“PDSPs”).
2. The key findings from this aggregate data are as follows:
 - **TOTAL PARCEL REVENUE IS JUST UNDER €1 BILLION, SIGNIFICANT GROWTH IN PARCEL REVENUE CONTINUED**
 - Just under €1bn parcel revenue for the year 2021 at €961.9m,
 - 26% revenue growth from 2020 to 2021 (32% revenue growth from 2019 to 2020).
 - **TOTAL PARCEL VOLUME IS 162 MILLION, VOLUME GROWTH SLOWED FROM 2020 HIGH**
 - 162 million parcel volumes in 2021, with 4% growth in parcel volumes from 2020 to 2021 (46% growth from 2019 to 2020).
 - **SEGMENTS (DOMESTIC¹ / INBOUND² / OUTBOUND³)**
 - Domestic parcel delivery revenue doubled (101% increase) from 2018, with €420m in revenue in 2021 compared to €208.9m in 2018. Volumes grew by 92% since 2018, with 89 million domestic parcels delivered in 2021.
 - Inbound parcel deliveries from abroad also grew significantly (72% increase) with €349.7m in revenue in 2021 compared to €203.6m in 2018. Volumes grew by 74% since 2018, with 62 million parcels from abroad delivered in Ireland in 2021.
 - Outbound parcel delivery, this is the smallest segment with only 11 million parcels for delivery abroad in 2021.

¹ Domestic segment – receivers and senders in Ireland

² Inbound segment – receivers in Ireland and the senders are abroad

³ Outbound segment – receivers are abroad and the senders in Ireland

2: Introduction

3. This report shares data on Irish parcels for the years 2018 – 2021, based on the data collected under the European CBPR⁴. This is in line with goal 7 of ComReg’s Postal Strategy Statement 2022 – 2024⁵ to “*promote the development of the postal sector by providing research, data, and information*”.
4. CBPR data collected is from 7 declared PDSPs:

Table 1 – PDSPs

PDSPs	
1. An Post (designated universal service provider for postal services until 1 August 2023)	5. UPS (integrated with Nightline)
2. DPD	6. Fastway
3. DHL	7. GLS
4. Fedex (integrated with TNT)	

5. The data presented in this report is in aggregate form given that the individual information by PDSPs is considered confidential and commercially sensitive.
6. The data presented is for the years 2018, 2019, 2020 and 2021. 2021 is the latest available data.
7. The data is also split by segment as follows:
 - a. Domestic segment – receivers and senders in Ireland,

⁴ The CBPR which was implemented in 2018 required the collection of data from Parcel Delivery Service Providers (“PDSPs”) that: 1) employed 50 or more employees over the previous calendar year, and 2) provided a parcel delivery service in the Member State in which the provider is established, unless they were established in more than one Member State. This information includes valuable information on volumes and revenues from each PDSP. Under the CBPR, a “parcel means a postal item containing goods with or without commercial value, other than an item of correspondence, with a weight not exceeding 31,5 kg”

⁵ [21122.pdf \(comreg.ie\)](#)

- b. Inbound segment – receivers are in Ireland and the senders are from abroad,
- c. Outbound segment – senders are in Ireland and receivers are abroad.

3: CBPR Aggregate Data

8. The aggregate revenue and volumes information of the 7 PDSPs that submitted data from the period 2018 – 2021 is presented below. This is then split to segment level: Domestic, Inbound, Outbound.

2.1 Total Revenue

9. Total revenue in 2021 for the PDSPs was €961.9m. This is a 26% increase compared to the previous year 2020, see Figure 1a & 1b. Since 2018, there has been a 62% growth in revenue for these PDSPs.

Figure 1a

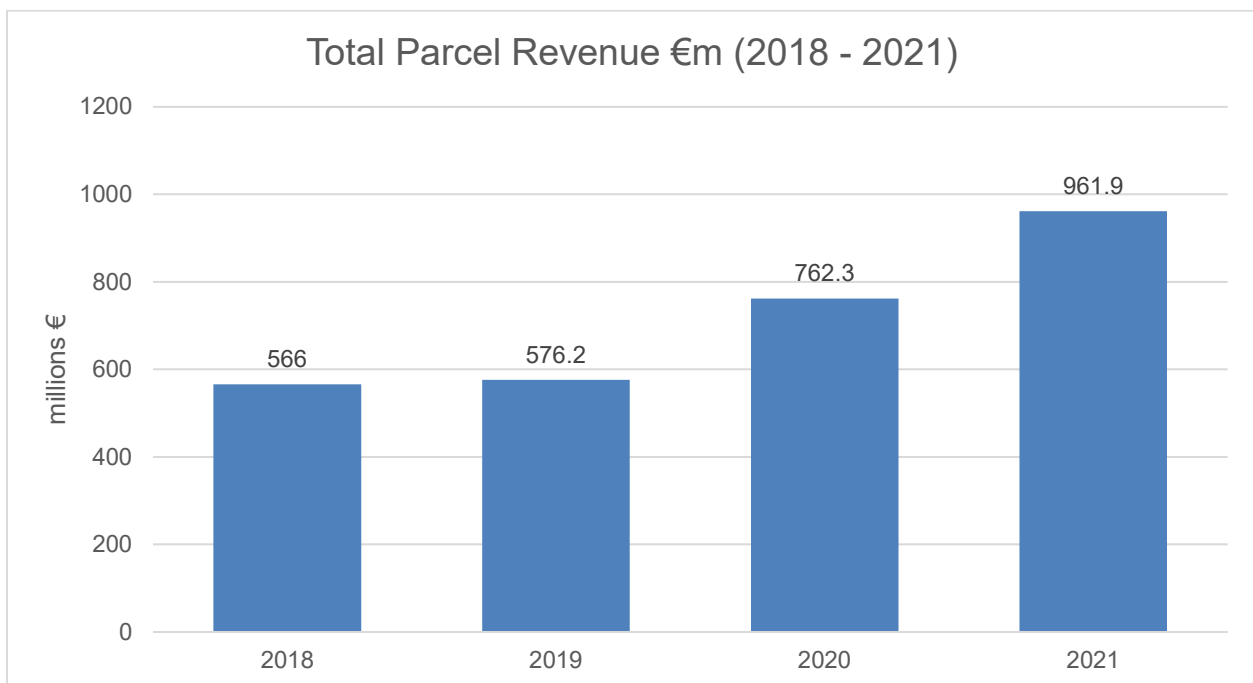
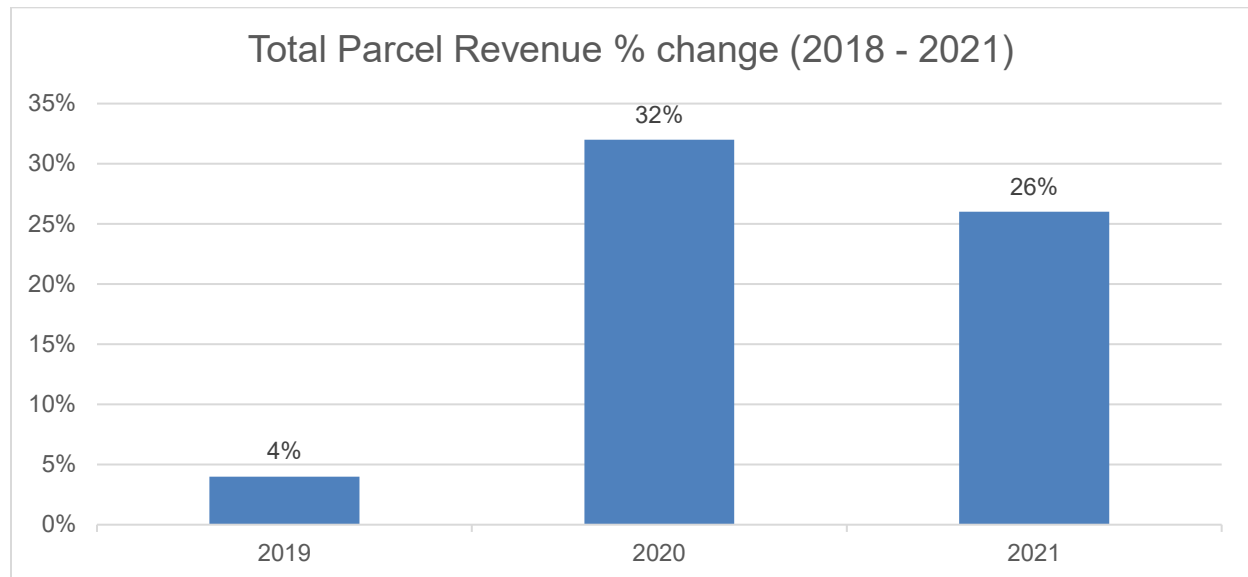


Figure 1b

Revenue by year	€m	% Increase
2021	961.90	26%
2020	762.30	32%
2019	576.20	4%
2018	566.00	

2.2 Total Volume

10. Total volume in 2021 for the PDSPs was 161.9m parcels. This was a 4% increase compared to the previous year 2020, see Figure 2a & 2b. Since 2018, there has been a 78% increase in parcel volume for PDSPs which was mainly driven by exceptional growth in 2020.

Figure 2a

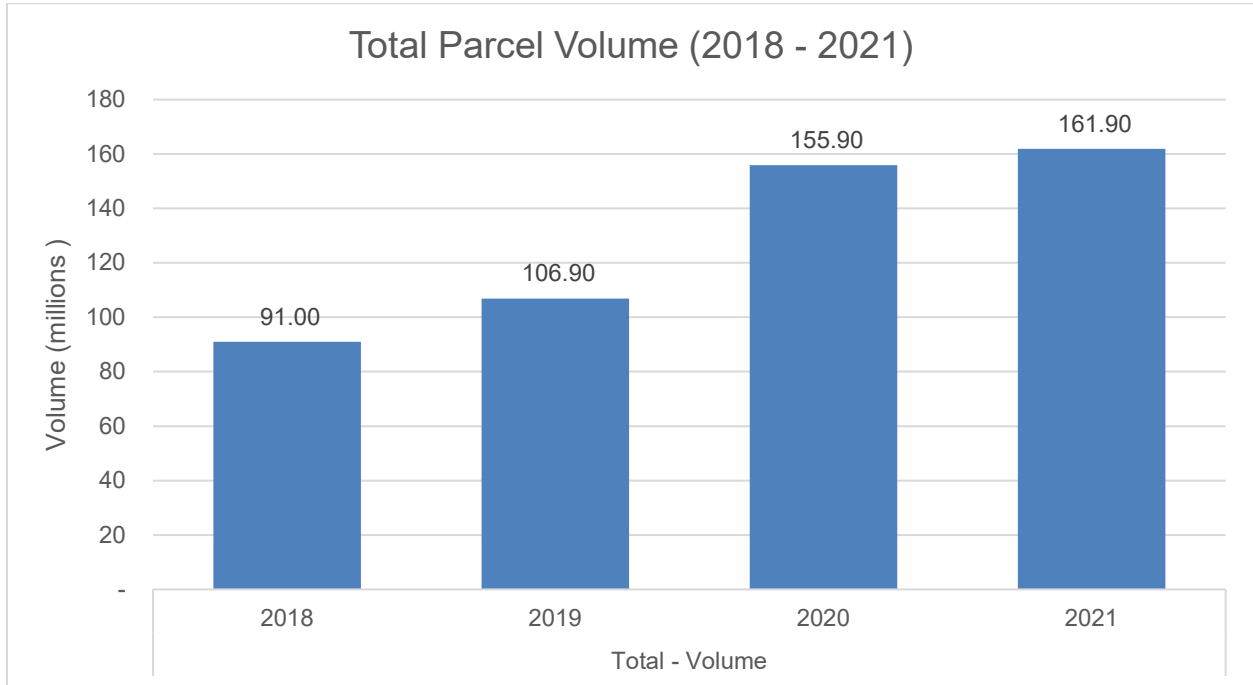
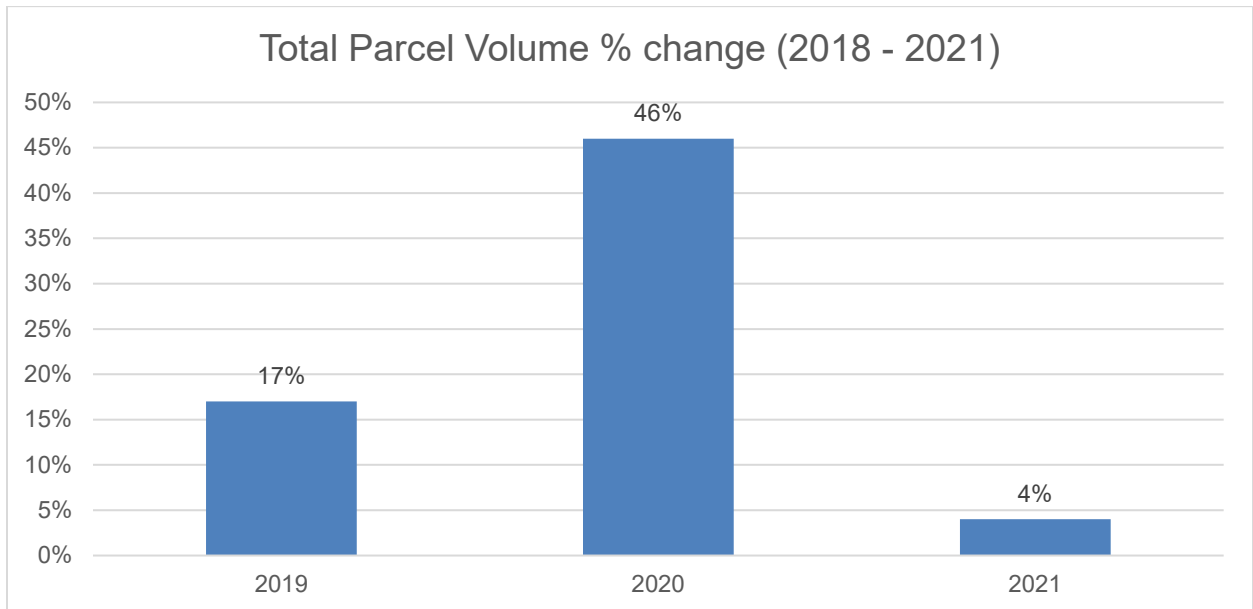


Figure 2b



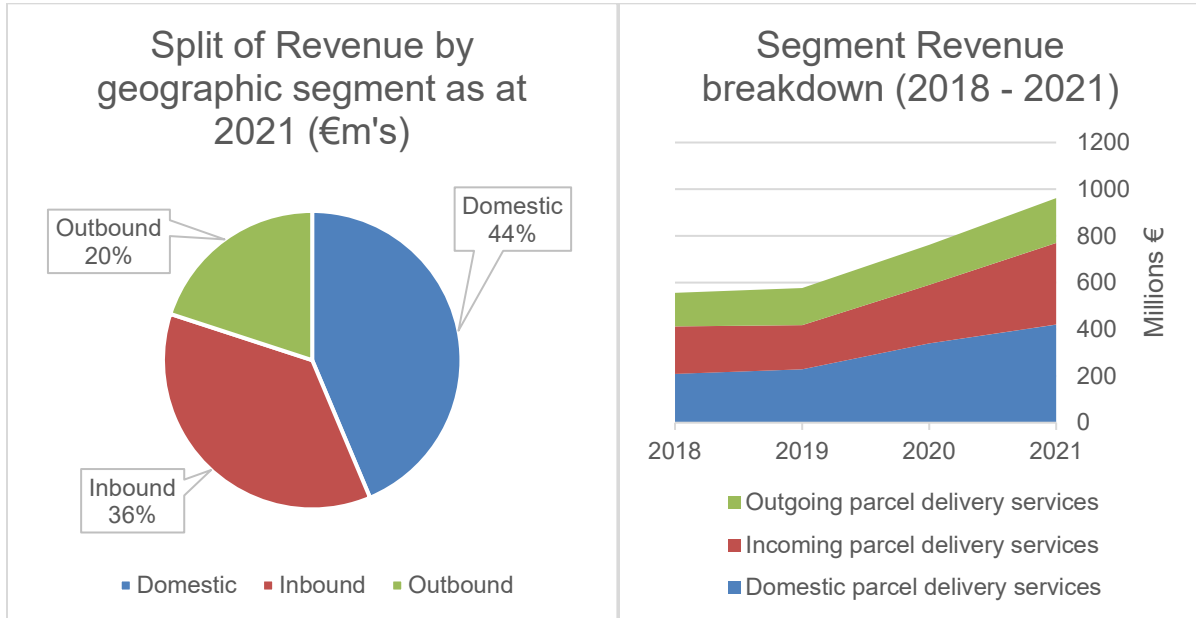
Volume by year	Vol m	% Increase
2021	161.90	4%
2020	155.90	46%
2019	106.90	17%
2018	91.00	

2.3 Segment Breakdown: Domestic, Inbound, Outbound

11. Revenue and volumes information collected from the PDSPs is split into the following segments as required under the CBPR:
 - a. Domestic
 - b. Inbound
 - c. Outbound

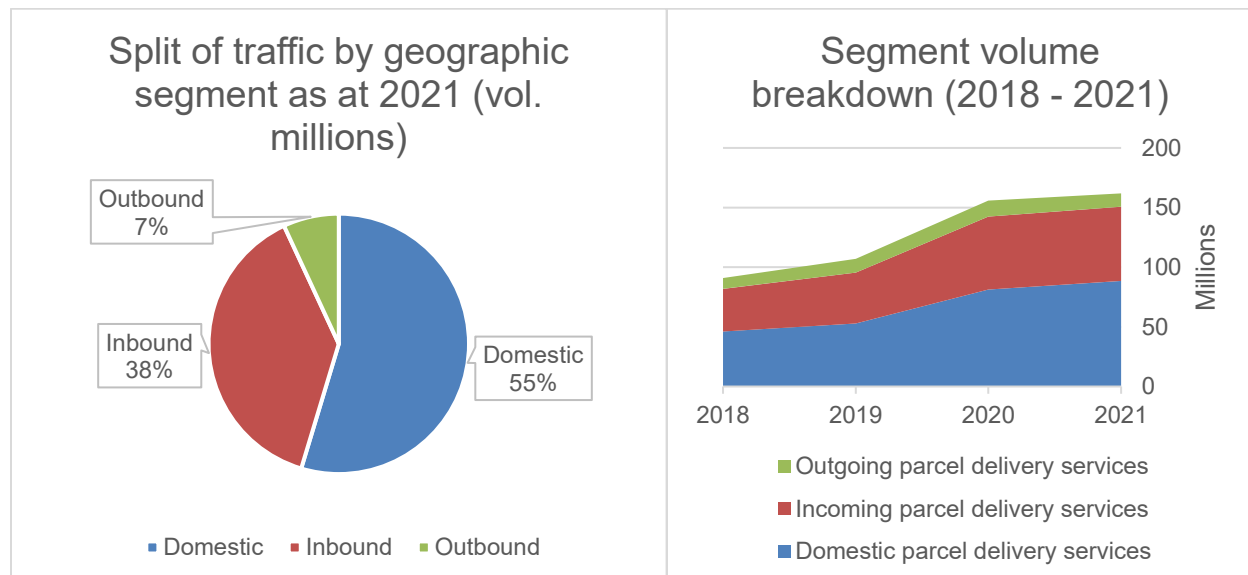
12. Of total revenue, the segment share for 2021 is illustrated in the pie chart in Figure 3 below. Domestic revenue makes up a 44% share of total revenue, followed by international inbound with 36% of the share and Outbound making up the remaining 20%. All segments have grown since 2018 with the greatest revenue share being realised in domestic parcel delivery as illustrated in the area graph of Figure 4. However, in 2021 Inbound had the biggest increase share of revenue versus the other segments with a €99.7m increase in revenue. In comparison, the Domestic increase was €79.8m, while the Outbound increase was €20.1m.

Figure 3 & 4



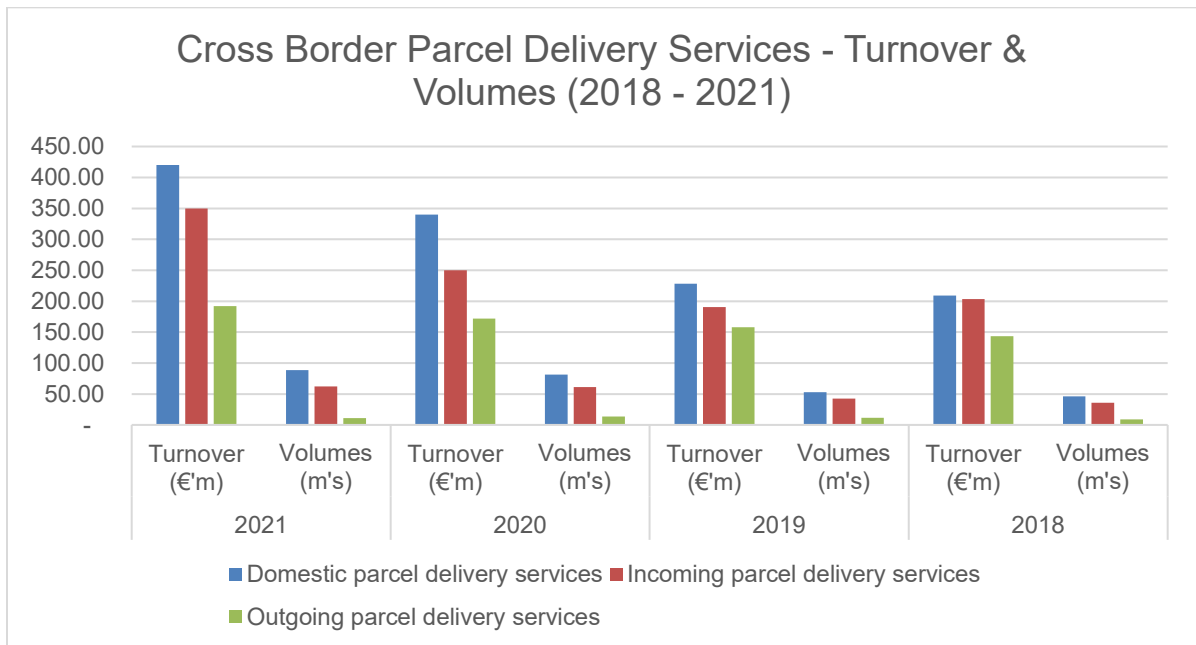
13. Of total volume, the segment share for 2021 is illustrated in the pie chart in Figure 5 below. Domestic traffic makes up over half of the share (55%) of total volumes, followed by International Inbound with 38% of the share and Outbound making up the remaining 7%. Domestic and Inbound parcel volumes have almost doubled since 2018, while outbound parcels have remained relatively static, see Figure 6 below.

Figure 5 & 6



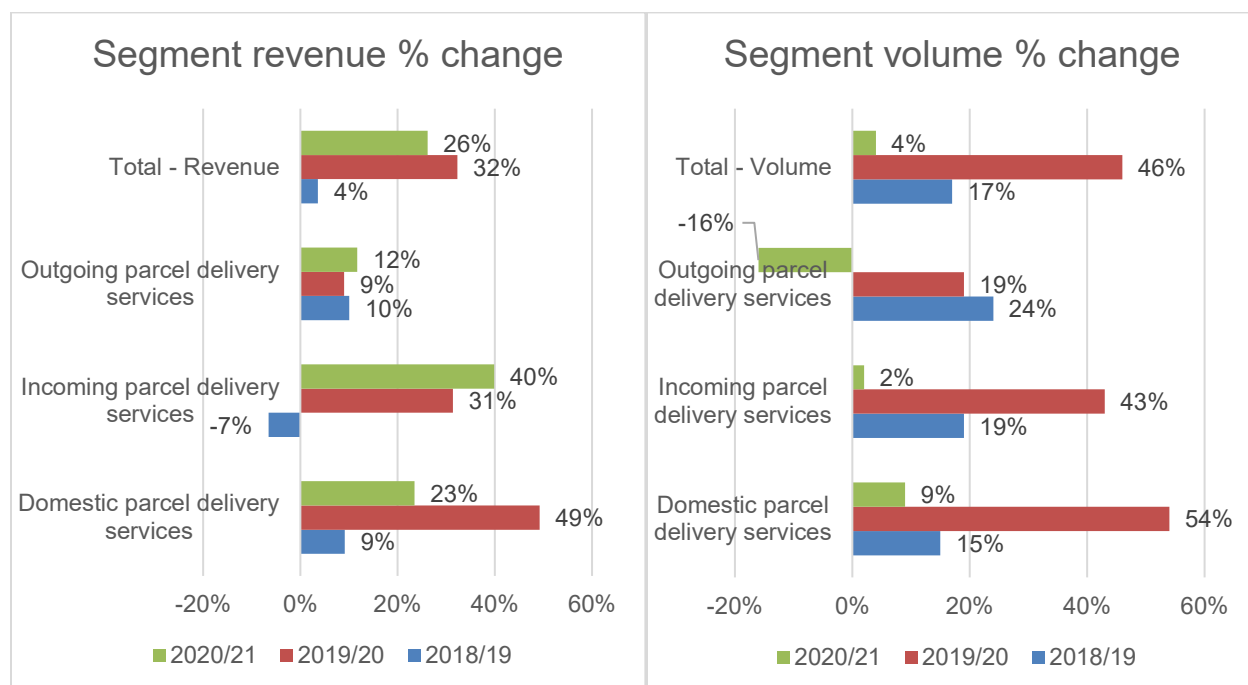
14. A summary of each segment from 2018 to 2021 is shown below, see Figure 7.

Figure 7



15. In particular, the year 2020 saw significant growth with a 32% increase in revenue and 46% in volume for all segments compared to the previous year. This growth has slowed down though in 2021 with growth in revenue of 26% and only 4% in volumes for all PDSPs when compared to 2020.

Figure 8



16. The below headings represent the segmentation of the parcel data for Ireland split between Domestic, Inbound and Outbound segments for PDSPs.

Domestic segment

17. Domestic revenue has doubled for PDSPs since 2018. This equates to an additional €211m in revenue for 2021 compared to 2018, see Figure 9a & 9b.

Figure 9a

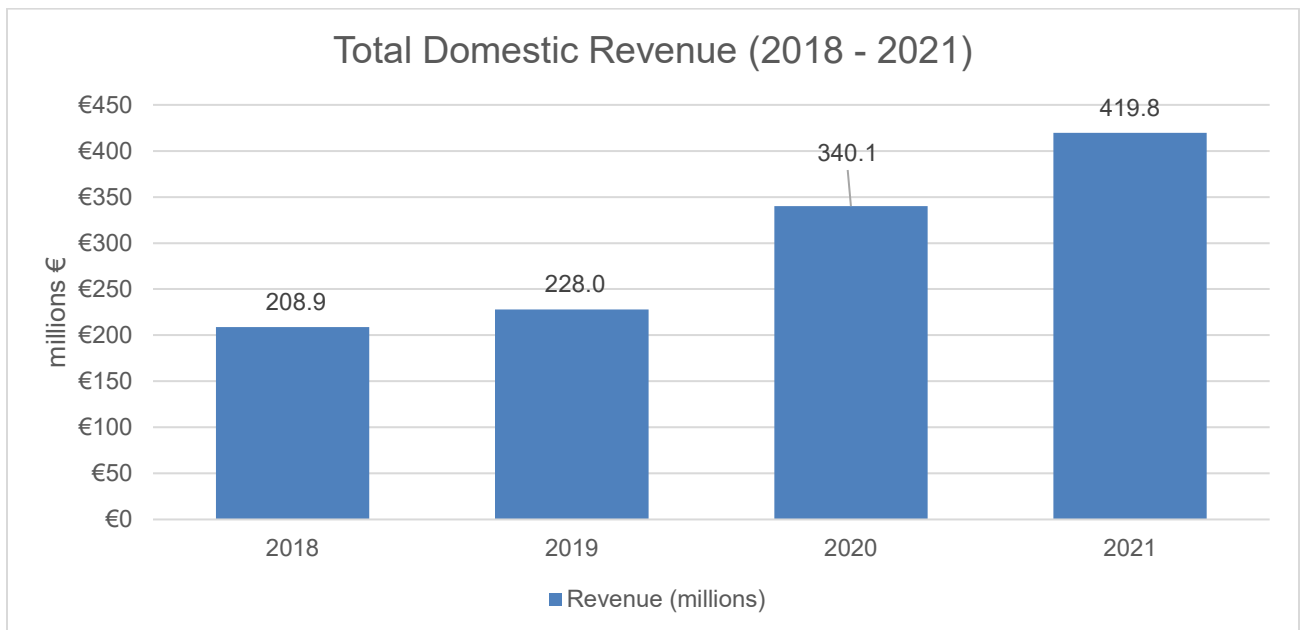
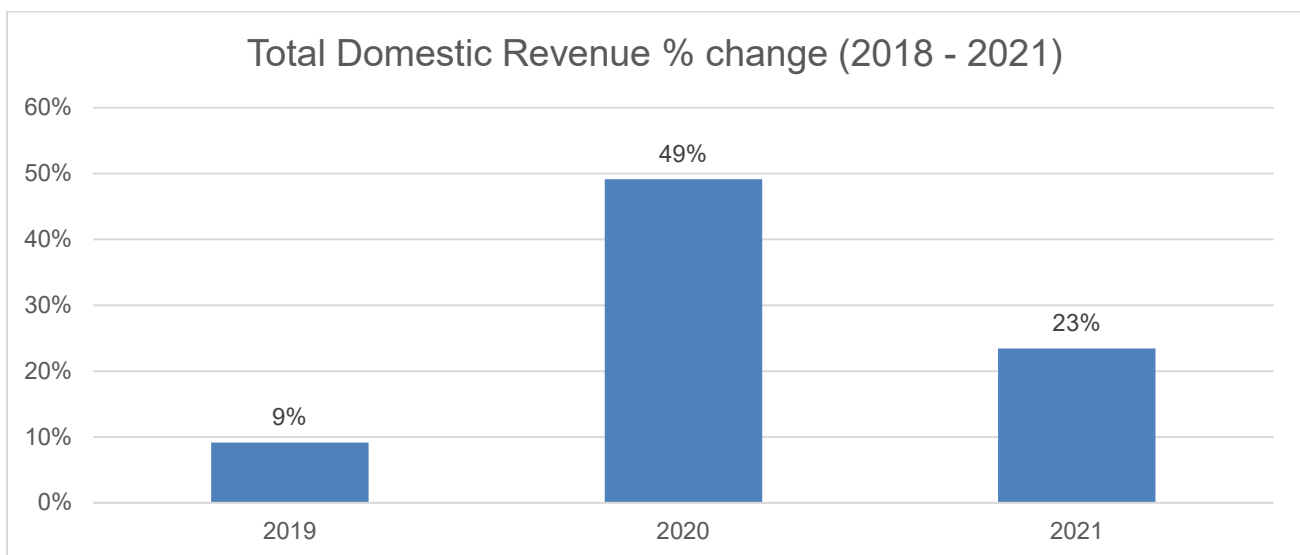


Figure 9b



18. These gains in revenue have been driven by the near doubling of parcel volume traffic (92%) since 2018. This growth has slowed down though in 2021; a 9% increase in parcel volume traffic from 2020 to 2021 being realised by all PDSPs compared to a 54% increase from 2019 to 2020, see Figure 10a & 10b below.

Figure 10a

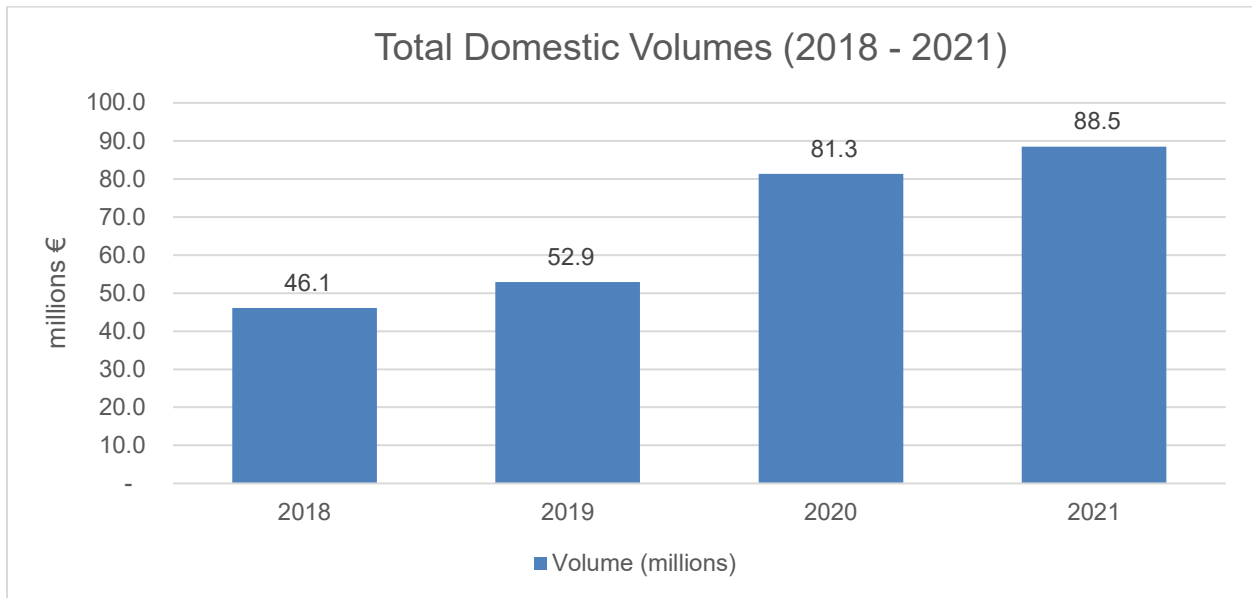
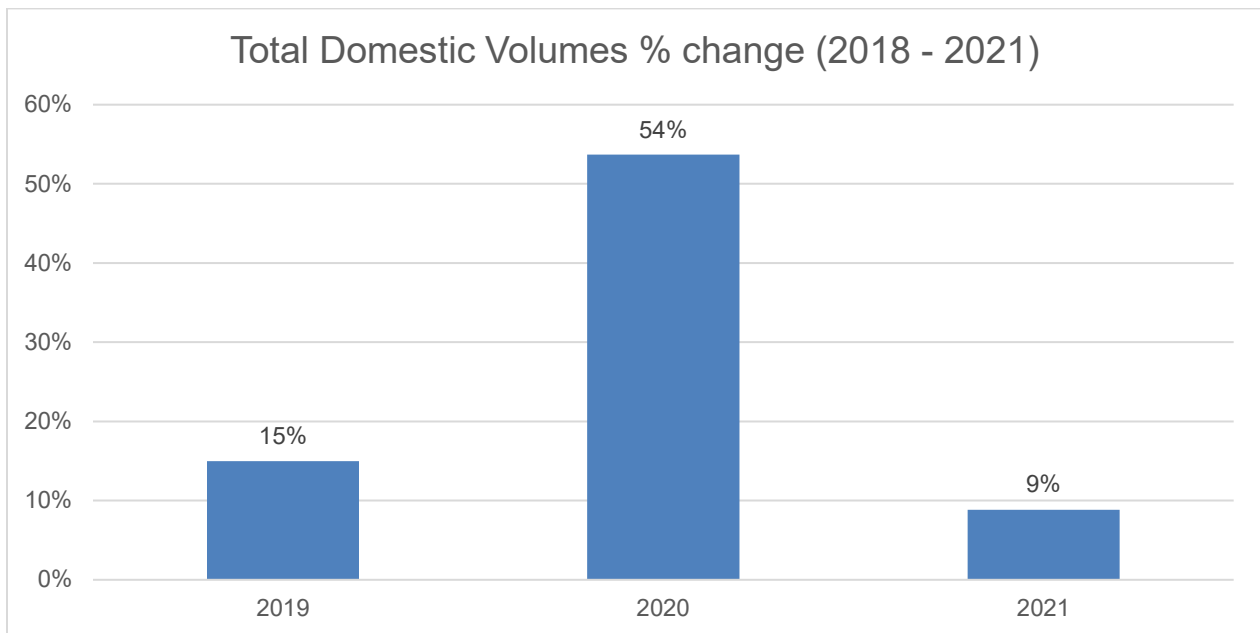


Figure 10b



Inbound segment

19. Inbound revenue dipped from 2018 to 2019 based on the aggregate data from PDSPs (not reflective of the position of all individual PDSPs for this period), see Figure 11a & 11b. However, from 2019 to 2021 there has been a 84% increase in revenue; a c.€159m net increase in revenue for the 7 PDSPs over this period.

Figure 11a

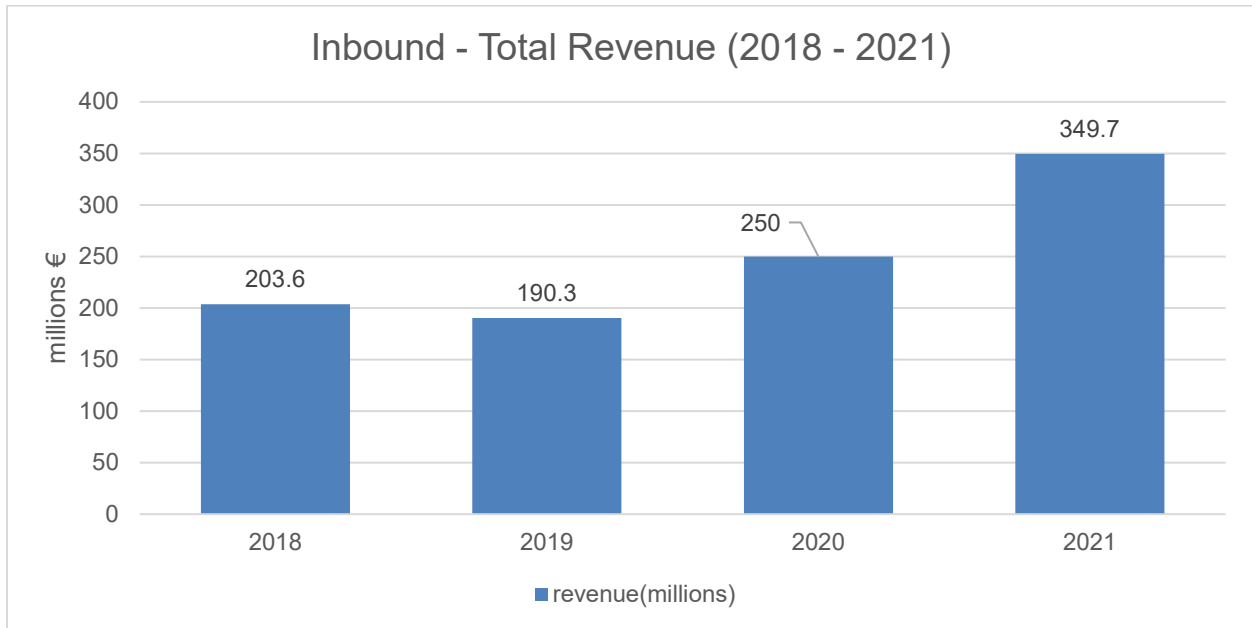
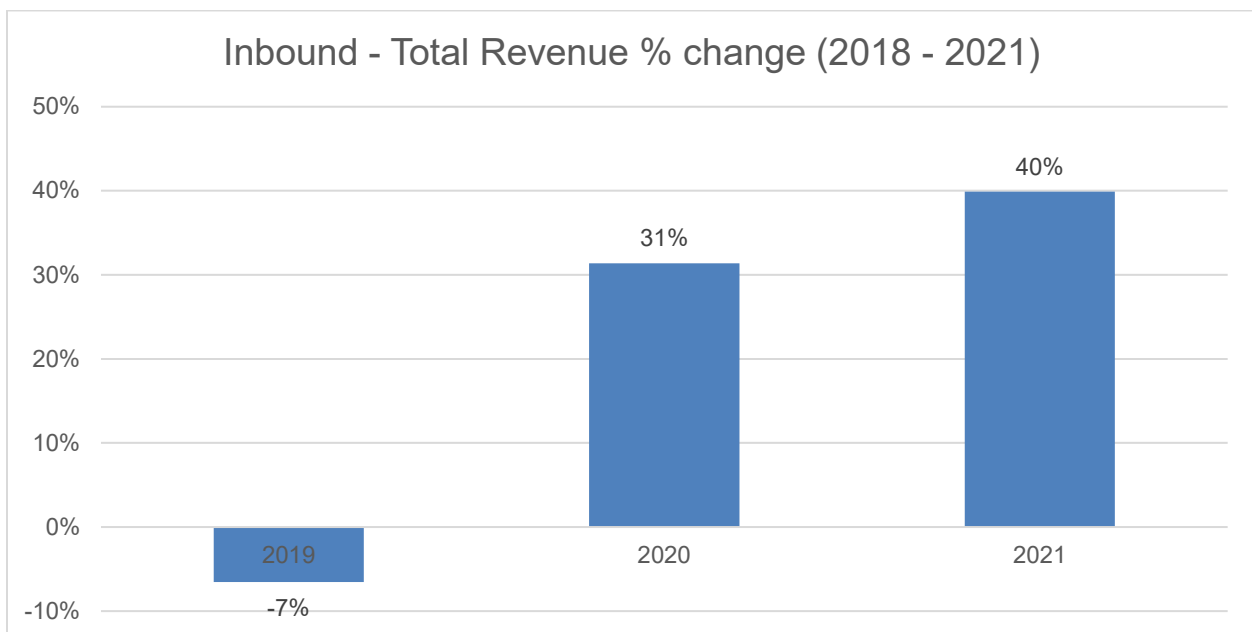


Figure 11b



20. However, volumes growth of inbound parcels delivered has declined significantly in 2021, see Figure 12a & 12b. There has been only a 2% increase in inbound volumes in 2021 versus a 43% growth rate in the period 2019 to 2020.

Figure 12a

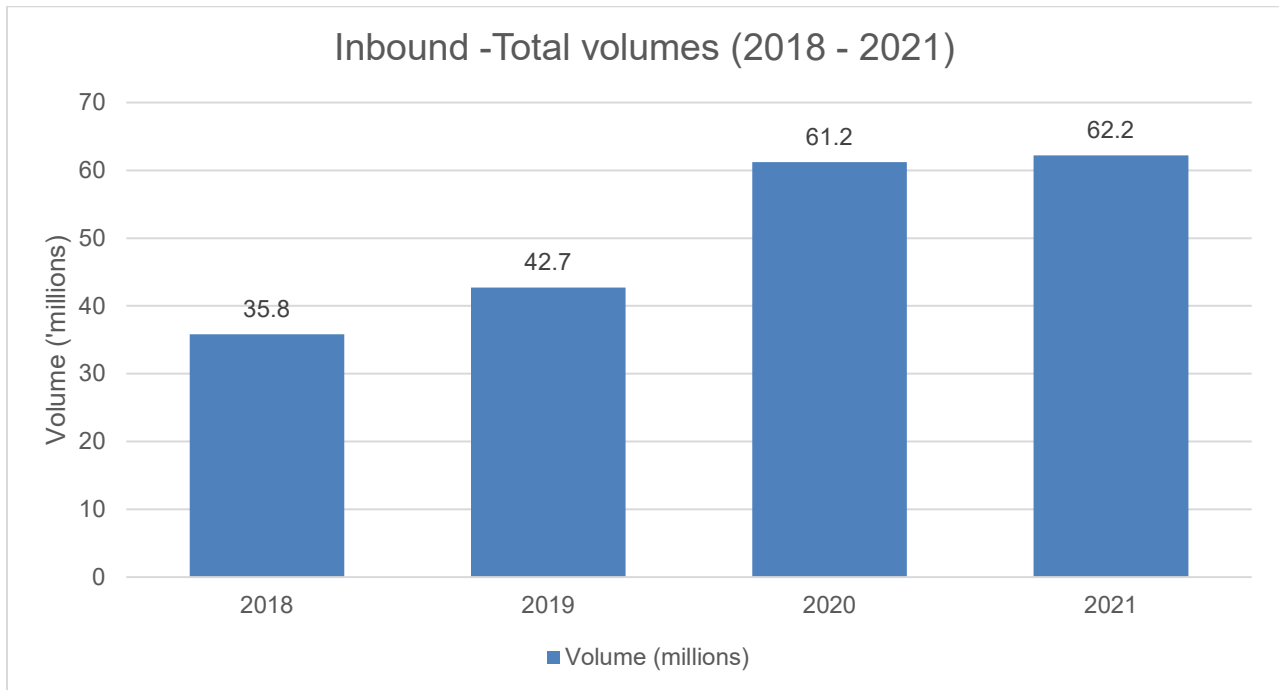
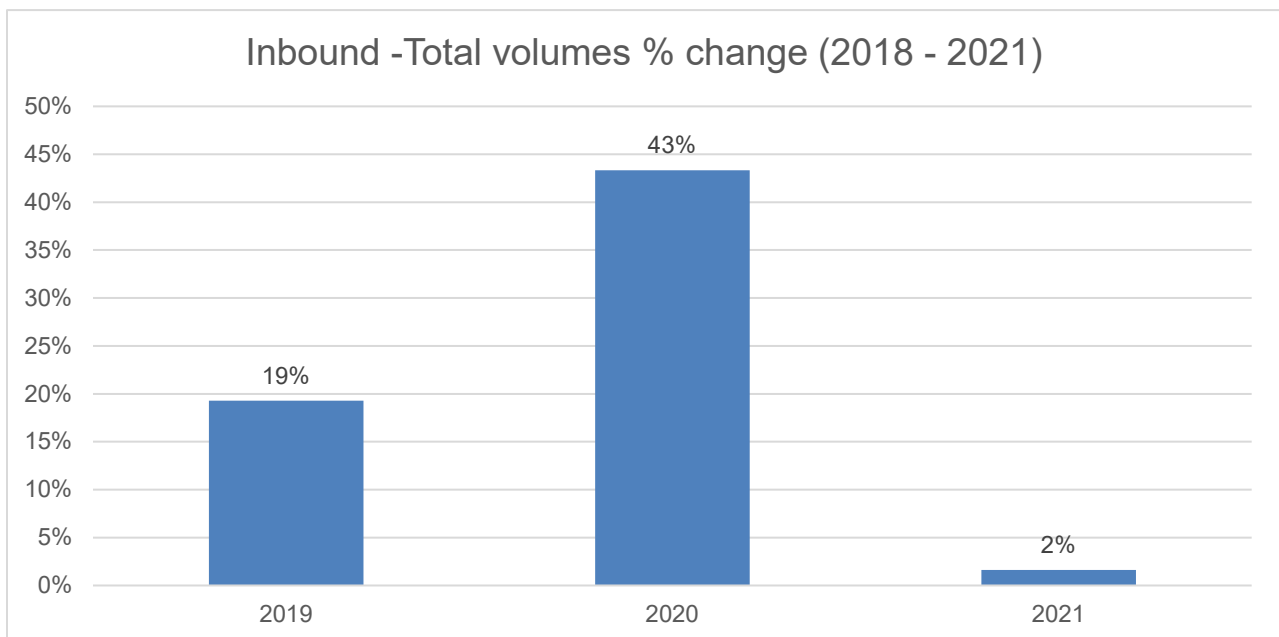


Figure 12b



Outbound segment

21. Outbound revenue has increased by €20m in 2021, see Figure 13a. A steady revenue growth rate of between 9 – 12% per annum since 2019 has been achieved for outbound parcel revenue.

Figure 13a

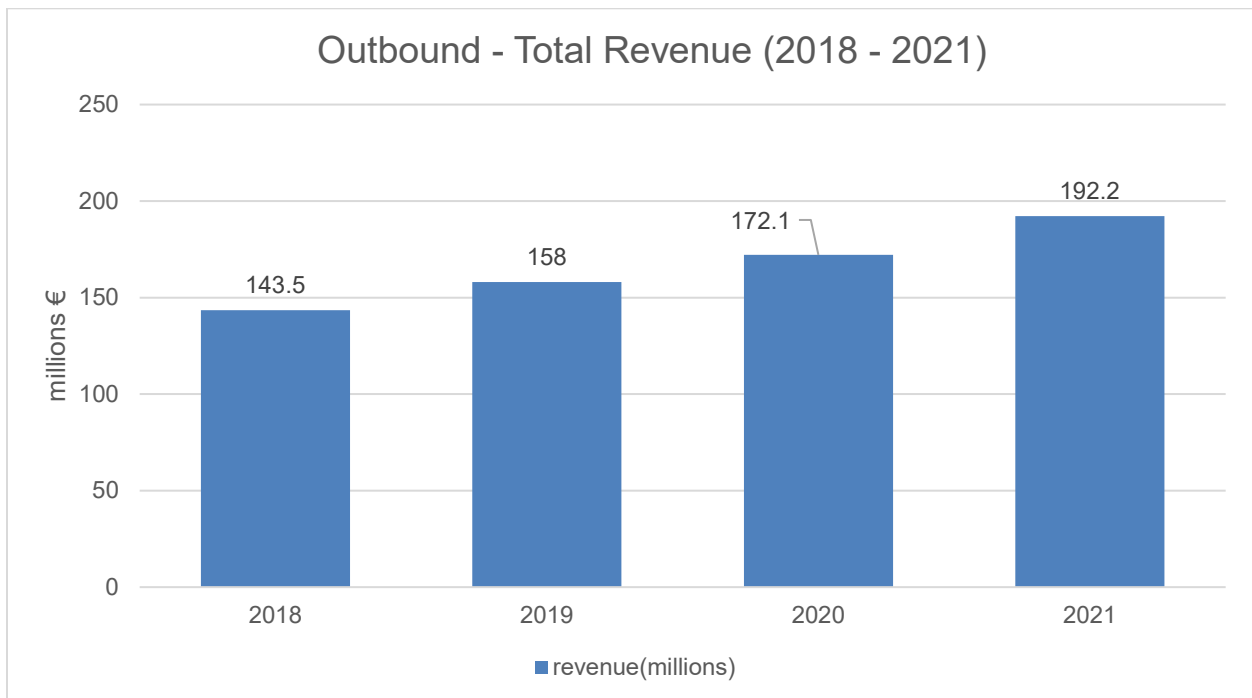
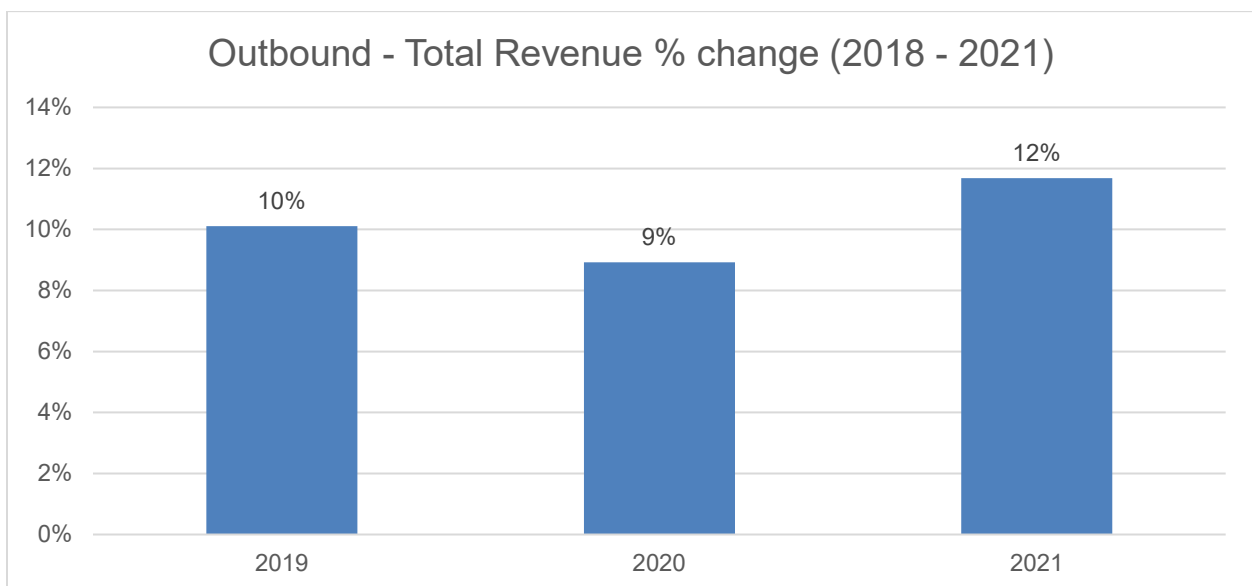


Figure 13b



22. Outbound parcel volumes though have declined in 2021 by c.-16%; c.-2m less parcels compared to the previous year (2021 11.2m, 2020 – 13.4m parcels), see Figure 14a & 14b.

Figure 14a

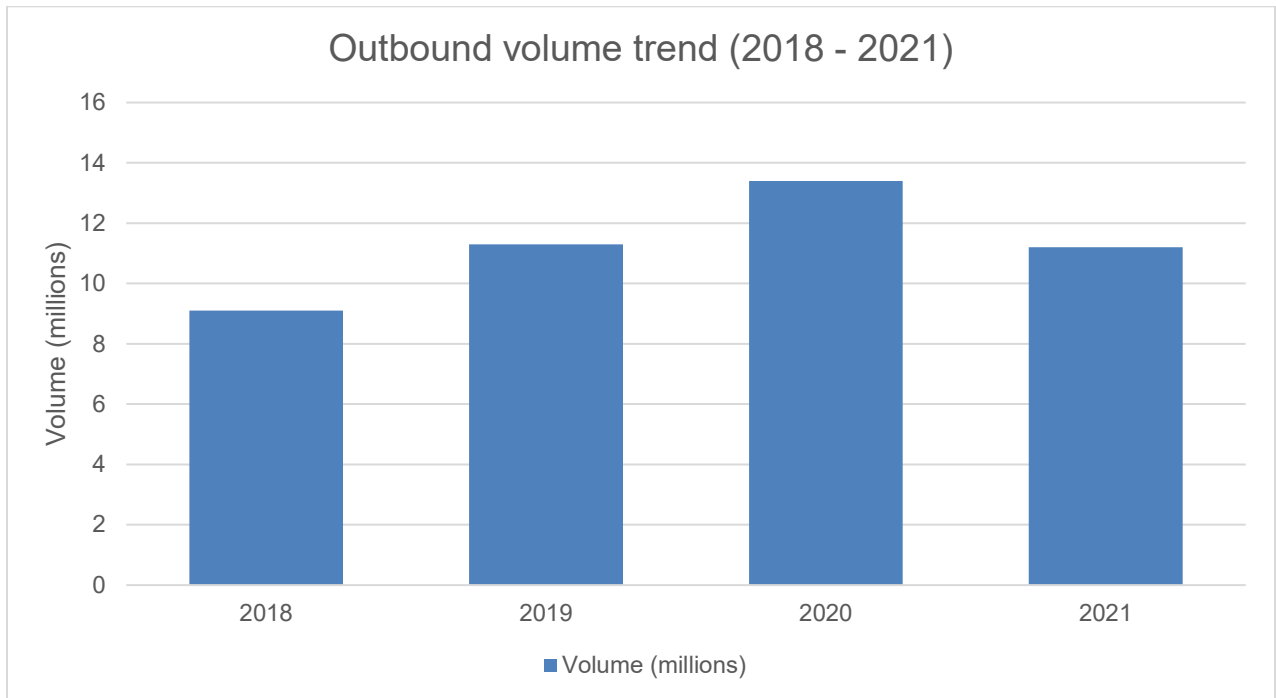
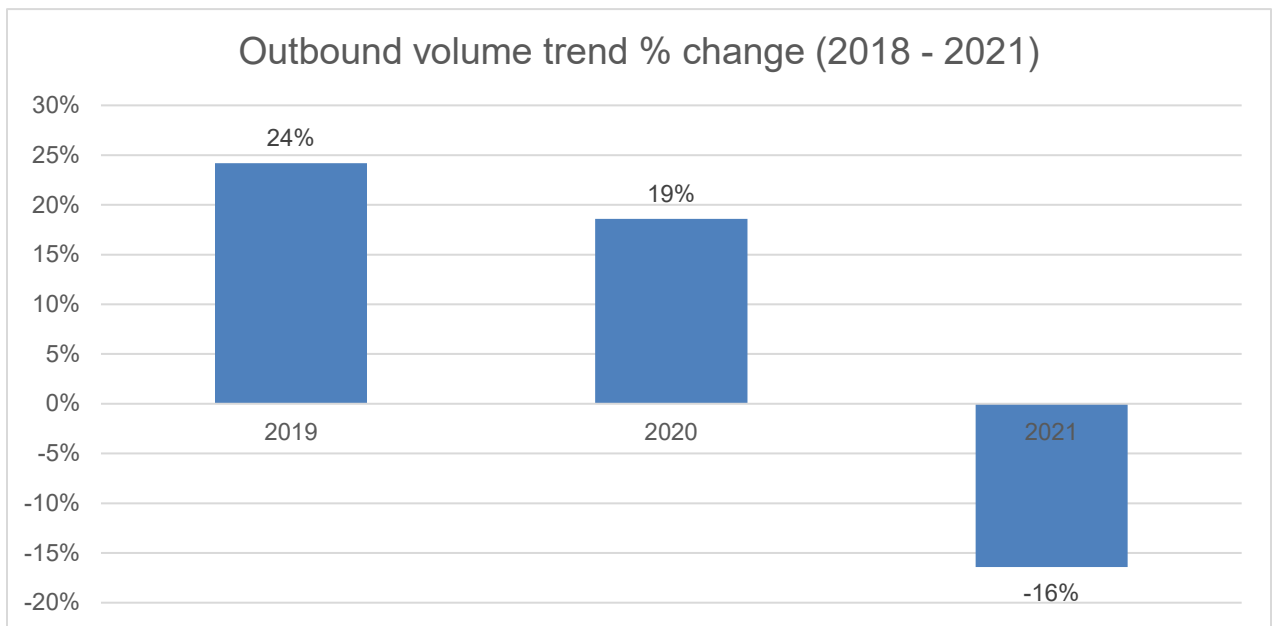


Figure 14b



3 Key findings

23. ComReg has produced this report to provide aggregate data and to inform on key trends for Irish parcels based on the data obtained under the CBPR for the years 2018 to 2021.
24. The key findings from this aggregate data are as follows:
 - a. Parcel revenue for the seven PDSPs was just under €1 billion in 2021,
 - b. 44% of the revenue share was for domestic parcel delivery (inbound 36% & outbound 20%),
 - c. 162 million parcels were delivered by these PDSPs in 2021 across all segments,
 - d. Segments (domestic / inbound / outbound) performed differently in terms of growth:
 - i. Domestic parcel delivery revenue doubled (101% increase) from 2018, with €420m in revenue in 2021 compared to €208.9m in 2018. Volumes grew by 92% since 2018, with 89 million domestic parcels delivered in 2021.
 - ii. Inbound parcel deliveries from abroad also grew significantly (72% increase) with €349.7m in revenue in 2021 compared to €203.6m in 2018. Volumes grew by 74% since 2018, with 62 million parcels from abroad delivered in Ireland in 2021.
 - iii. Outbound parcel delivery, this is the smallest segment with only 11 million parcels for delivery abroad in 2021.