An Coimisiún um Rialáil Cumarsáide
Commission for Communications Regulation

Parcel data for Ireland

2018 - 2023

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1 Introduction

1. The Commission for Communications Regulation (ComReg) has prepared this report to share data on Irish parcels collected under the European Cross Border Parcel Regulation (CBPR)[1]. CBPR data collected is from 7 declared Parcel Delivery Service Providers (PDSPs), there has been no change in PDSPs compared to the previous year:

Table 1: PDSPs

PDSPs	
An Post	Fedex
DHL	GLS
DPD	UPS
Fastway	

2. The data presented in this report is in aggregate form given that the individual information by PDSPs is considered confidential and commercially sensitive.

3. The data presented is for the 6 years, 2018 to 2023. 2023 is the latest available data.

4. The data is also split by segment as follows:

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

[1] The CBPR which was implemented in 2018 requires the collection of data from 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. Data collected includes 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".

2 Key insights

5. The key insights from aggregate data collected on parcel delivery in Ireland include:

- Parcel revenue for the seven PDSPs was €867.4m in 2023 (a decrease of 1% when compared to 2022). 43.1% of the revenue share was for domestic parcel delivery (inbound 36.5% & outbound 20.4%) in 2023.

- 140.73 million parcels were delivered by the seven PDSPs in 2023 across all segments (an increase of 1% compared to 2022).

- Segments (domestic / inbound / outbound) performed differently:

  - Domestic parcel delivery revenue increased by 3% in 2023, an increase of €9.6m. This was driven by a 6% increase in volumes with 5.2 million more domestic parcels being delivered in 2023. 2023 domestic volumes are at the same peak levels seen in 2021 during the pandemic.

  - Inbound parcel delivery revenue reduced by c.€5m, a reduction of 2%. This was driven by a reduction of 6% in inbound mail volumes. Inbound volumes are now at the same levels as pre-pandemic 2019 with 42 million parcels being delivered in 2023.

  - Outbound parcel delivery revenue declined by 7% in 2023 with revenue of €176.9 million. This continues to be the smallest segment in terms of volumes with 9.92 million parcels.

6. The key insights above must be caveated for the following reasons:

- The insights and trends are based on total aggregate figures of the seven declared PDSPs only;

- The insights and trends do not necessarily reflect the individual performances of each of the seven PDSPs.

3 CBPR Aggregate Data

7. The aggregate revenue and volumes information of the 7 PDSPs that submitted data from the period 2018 – 2023 is presented below. This is then split to segment: Domestic, Inbound, Outbound.

3.1 Total Revenue

8. Total revenue in 2023 for the PDSPs was €867.4m, a 1% decrease (€7.7m) compared to the previous year 2022, see Figure 1a & 1b.

Figure 1a: Total Parcel Revenue 2018-2023

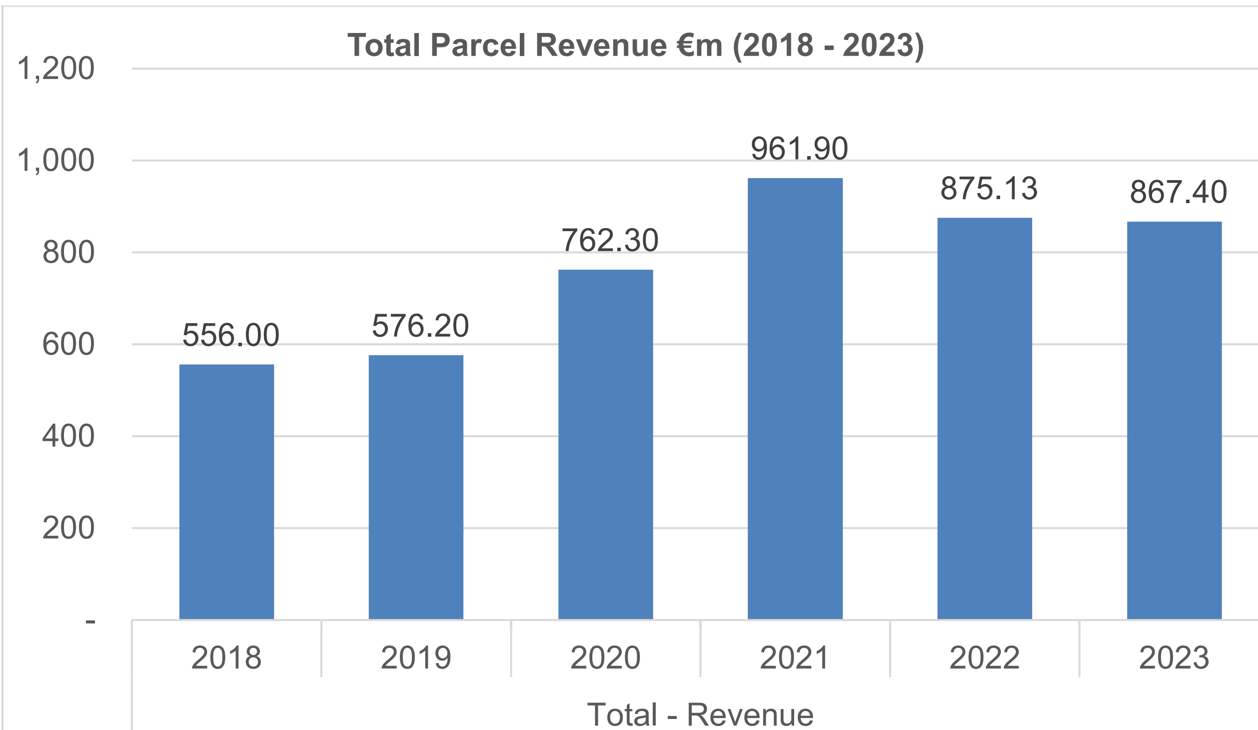


Figure 1b: Total Parcel Revenue % change 2019-2023

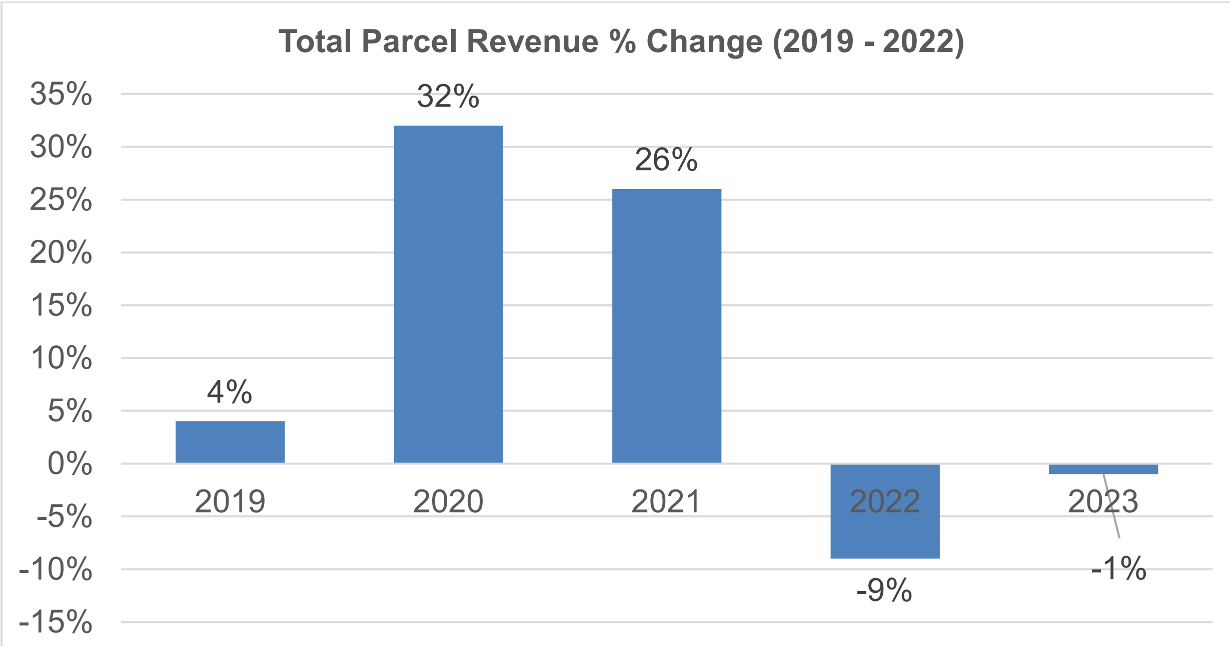


Table 2: Parcel Revenue by year

Revenue by year	Revenue €million	% Increase / decrease
2023	867.40	-1%
2022	875.13	-9%
2021	961.90	26%
2020	762.30	32%
2019	576.20	4%
2018	566.00	

3.2 Total Volume

9. Total volume in 2023 for the PDSPs was 140.73 million parcels. This was a 1% increase compared to the previous year 2022, see Figure 2a & 2b.

Figure 2a: Total Parcel Volume 2018-2023

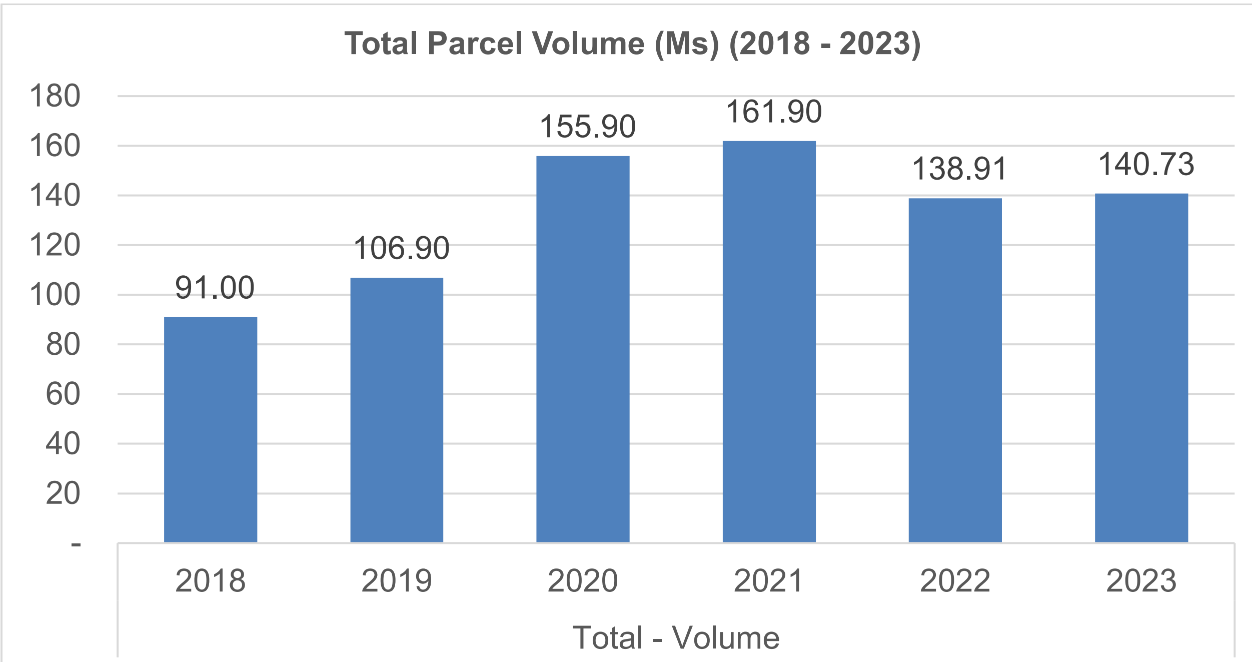


Figure 2b: Total Parcel Volume % change 2019-2023

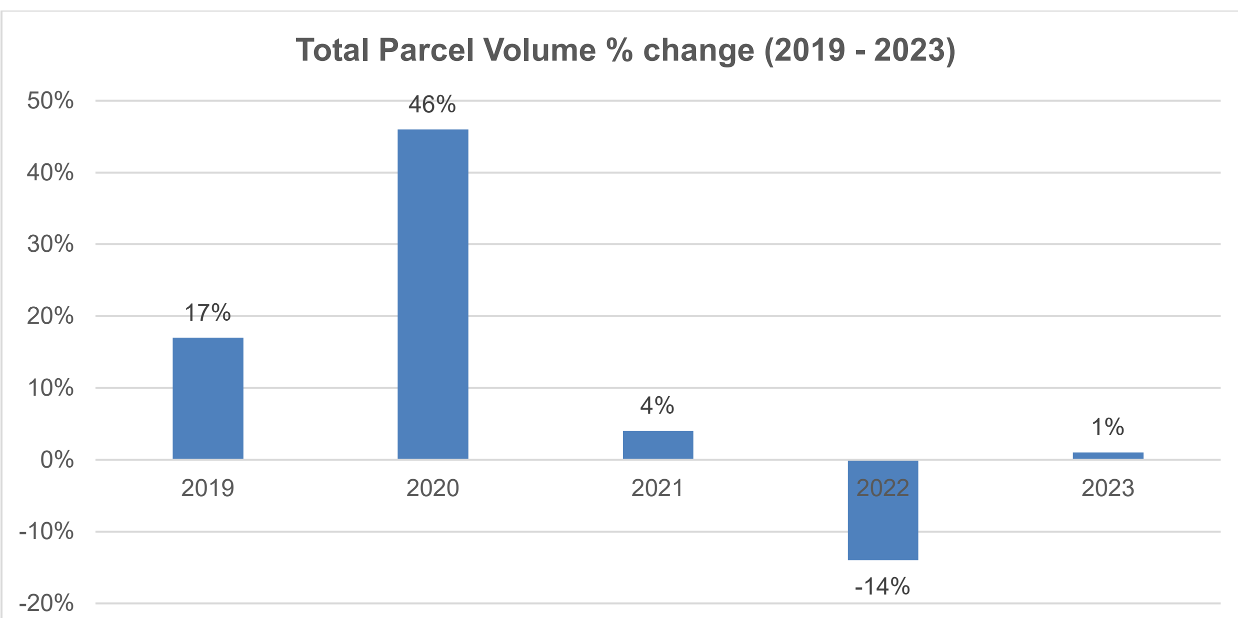


Table 3 – Parcel Volume by year

Volume by year	Volume million	% Increase / decrease
2023	140.73	1%
2022	138.91	-14%
2021	161.90	4%
2020	155.90	46%
2019	106.90	17%
2018	91.00	

3.3 Segment Breakdown: Domestic, Inbound, Outbound

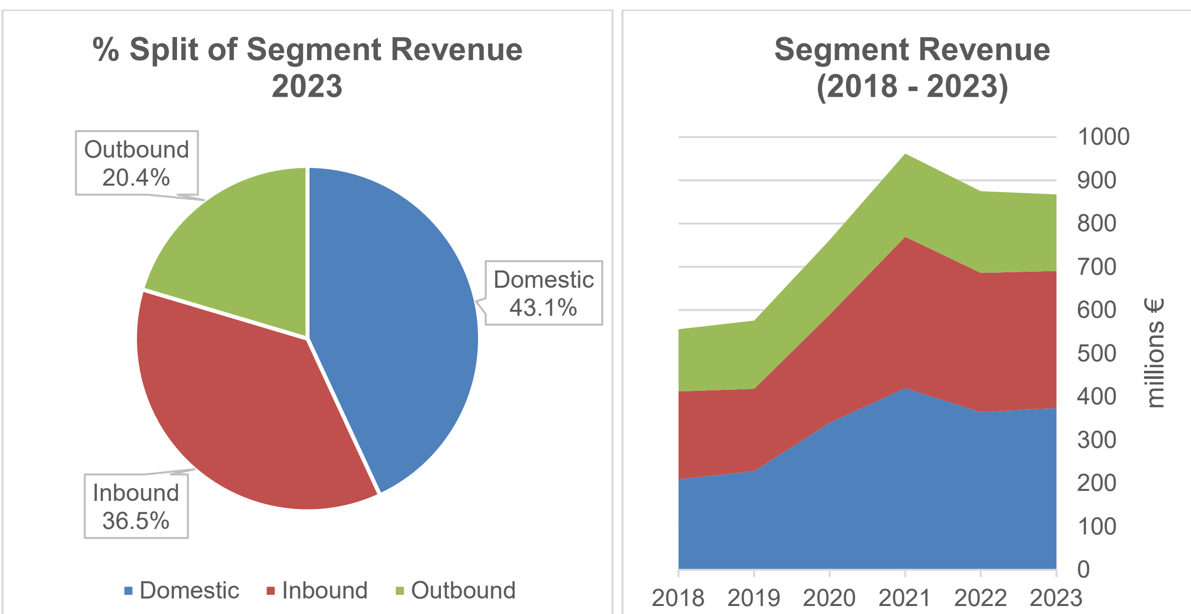
10. Revenue and volumes information collected from the PDSPs is split into the following segments as required under the CBPR:

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

11. Of total revenue, the segment share for 2023 is illustrated in the pie chart in Figure 3 below. Domestic revenue makes up a 43.1% share of total revenue, followed by Inbound with 36.5% of the share and Outbound making up the remaining 20.4%.

12. Inbound and Outbound segments saw a second consecutive year of revenue reducing; 2% and 7% reductions respectively, see Figure 4. This is a €5.1m reduction in revenue for inbound and €12.4m for outbound traffic. However, Domestic had a 3% increase in revenue of €9.8m in 2023.

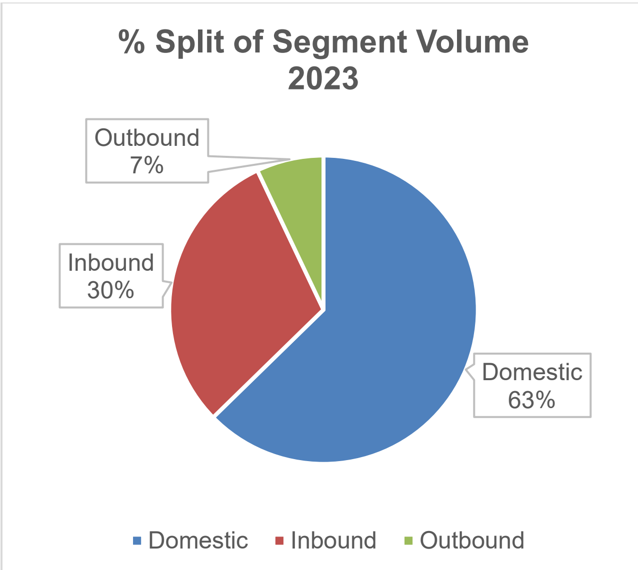
Figure 3 & 4: Segment Revenue

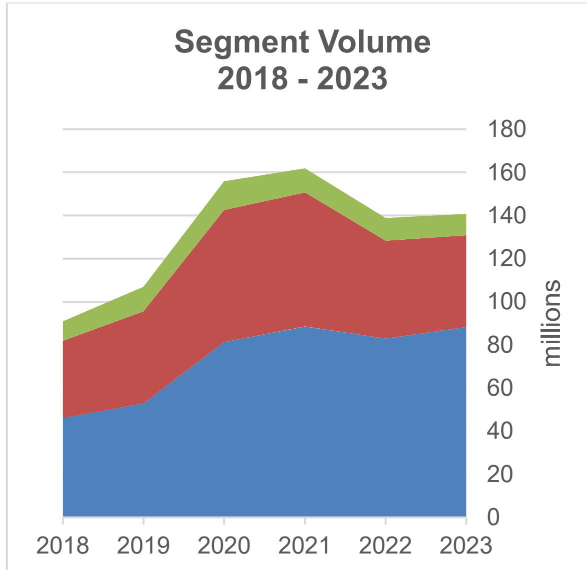


13. Of total volume, the segment share for 2023 is illustrated in the pie chart in Figure 5 below. Domestic makes up 63% of total volumes, followed by Inbound with 30% of the share and Outbound making up the remaining 7%. Domestic share of parcels continues to grow compared to previous years and have now returned to equivalent

volumes level as that of peak pandemic in 2021; also, there has been a continued decline in inbound and outbound parcel traffic, see Figure 6.

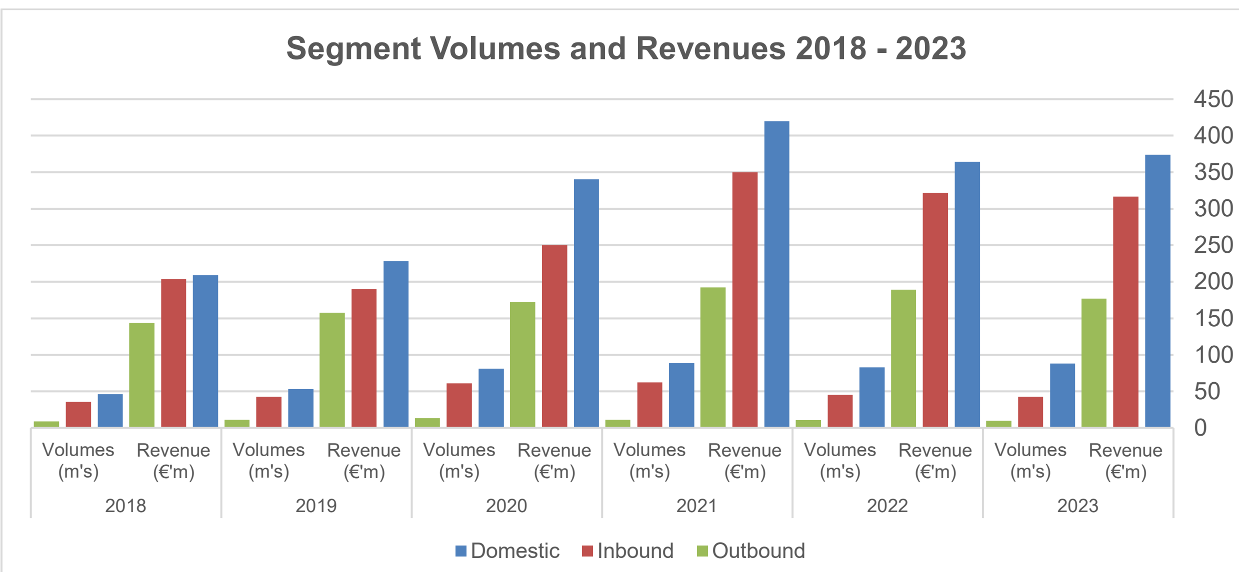
Figure 5 & 6: Segment Volume





14. A summary of each segment from 2018 to 2023 is shown below, see Figure 7.

Figure 7: Segment Volumes and Revenues 2018 - 2023



15. The reduction in parcel volumes growth has continued to decline for the Inbound and Outbound segment in 2023. Outbound traffic though is relatively low compared to other segments and volumes have remained relatively static over the previous years. The decline in Inbound volume has reduced significantly compared to 2022; a 6% decline seen in 2023 compared to a 27% decline in 2022. Domestic volumes in 2023 are equivalent to volumes seen in the height of the pandemic in 2021.

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 increase by €9.66m in 2023. This was an increase of 3% which is a reverse on the significant decline seen in 2022 of 13%, see Figure 8a & 8b.

Figure 8a: Domestic Revenue 2018-2023

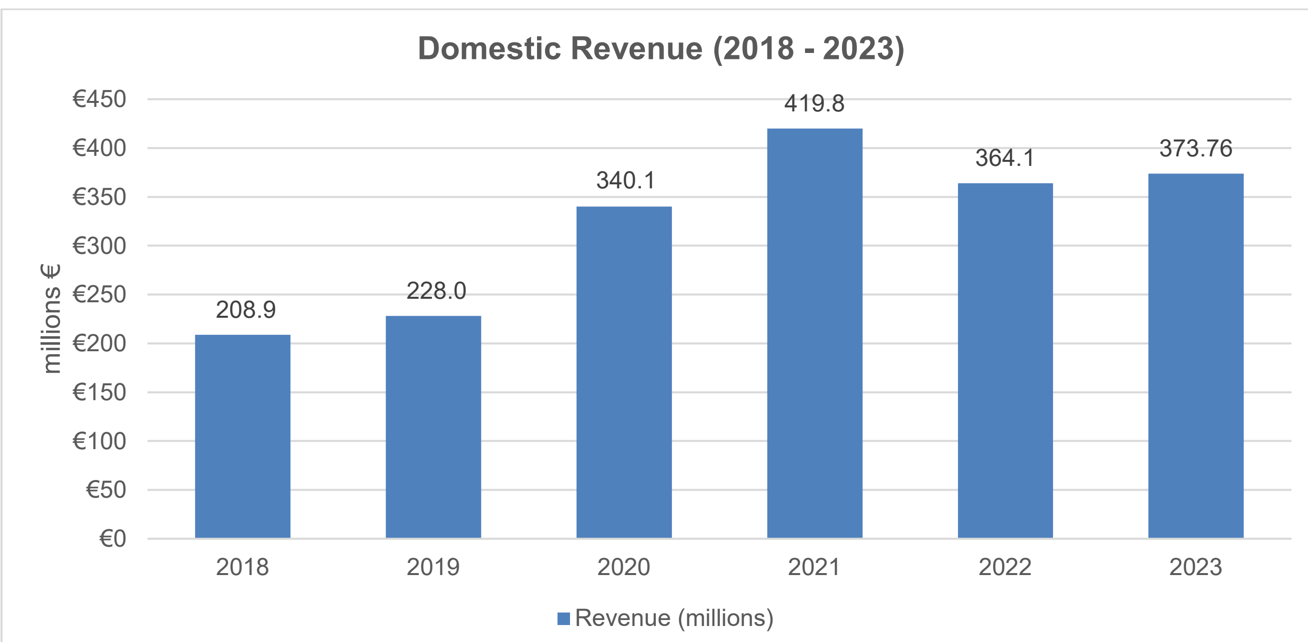
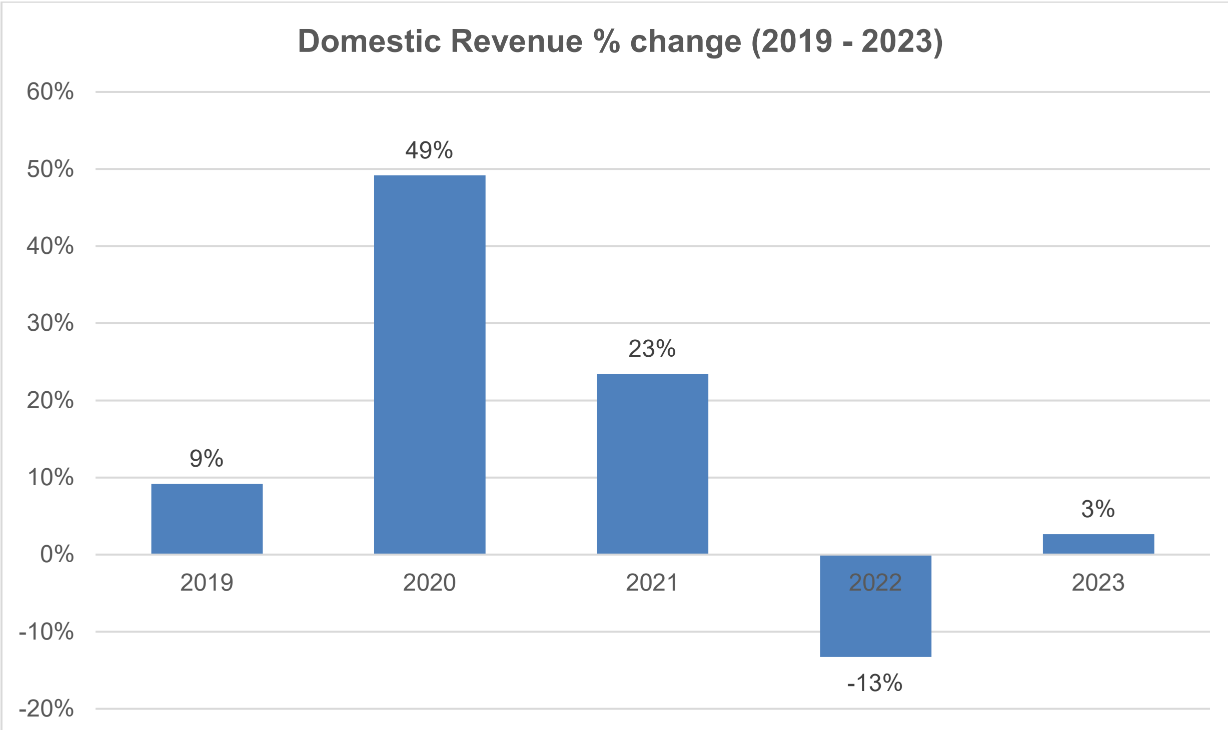


Figure 8b: Domestic Revenue % change 2019-2023



18. This increase in revenue in 2023 has been driven by a 6% increase in Domestic parcel volume, 5.2m parcels, see Figure 9a and 9b below. Domestic volumes are at an equivalent level to 2021 which was during the peak of the pandemic and restrictions.

Figure 9a: Domestic Volumes 2018-2023

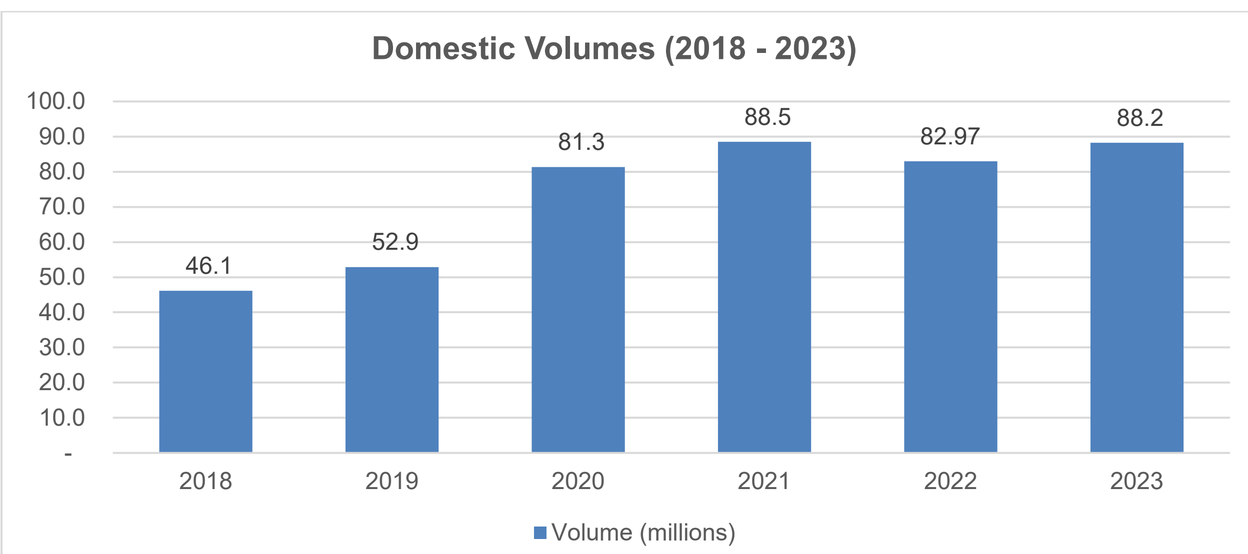
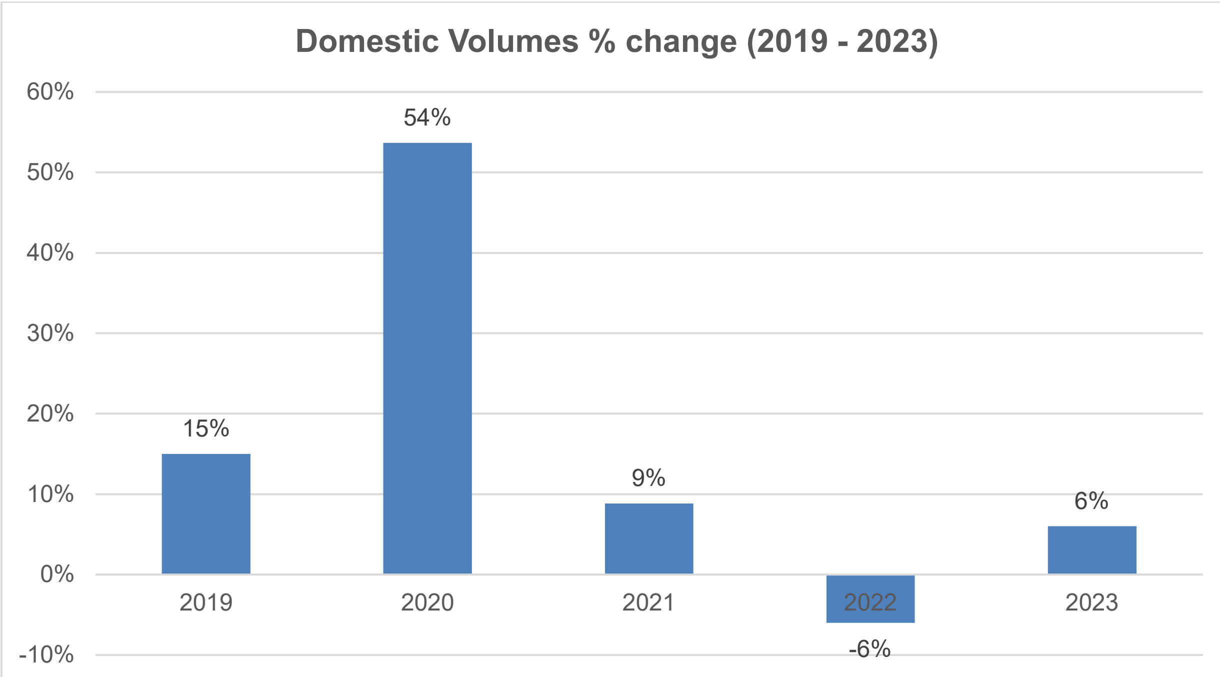


Figure 9b: Domestic Volumes % change 2019-2023



Inbound segment

19. Inbound revenue has continued to decline from €321.8m in 2022 to €316.71m in 2023; however, this is at a slower rate compared to the previous year; see Figure 10a & 10b.

Figure 10a: Inbound Revenue 2018-2023

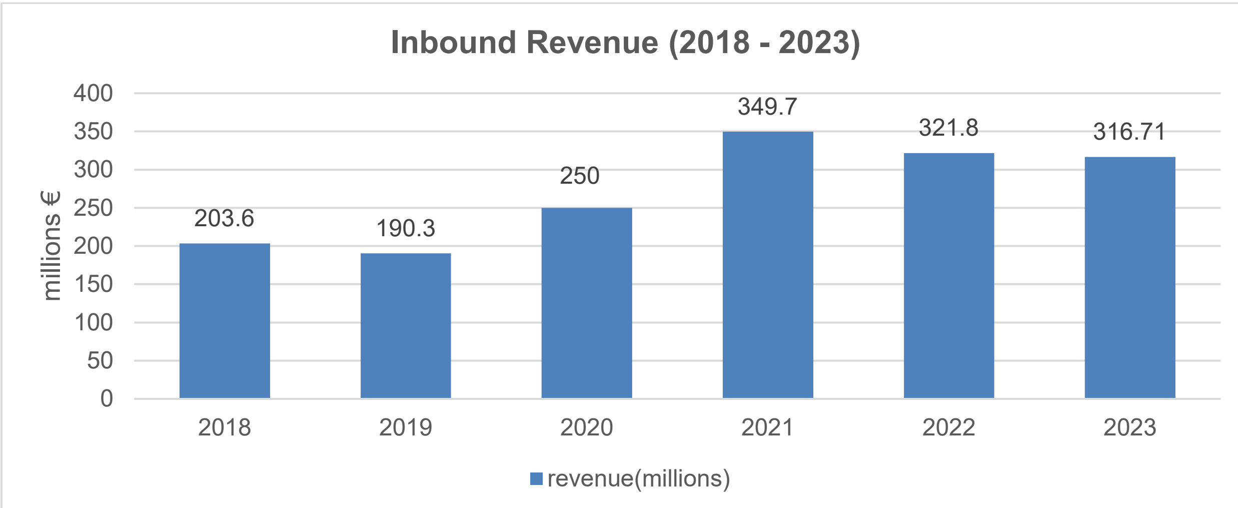
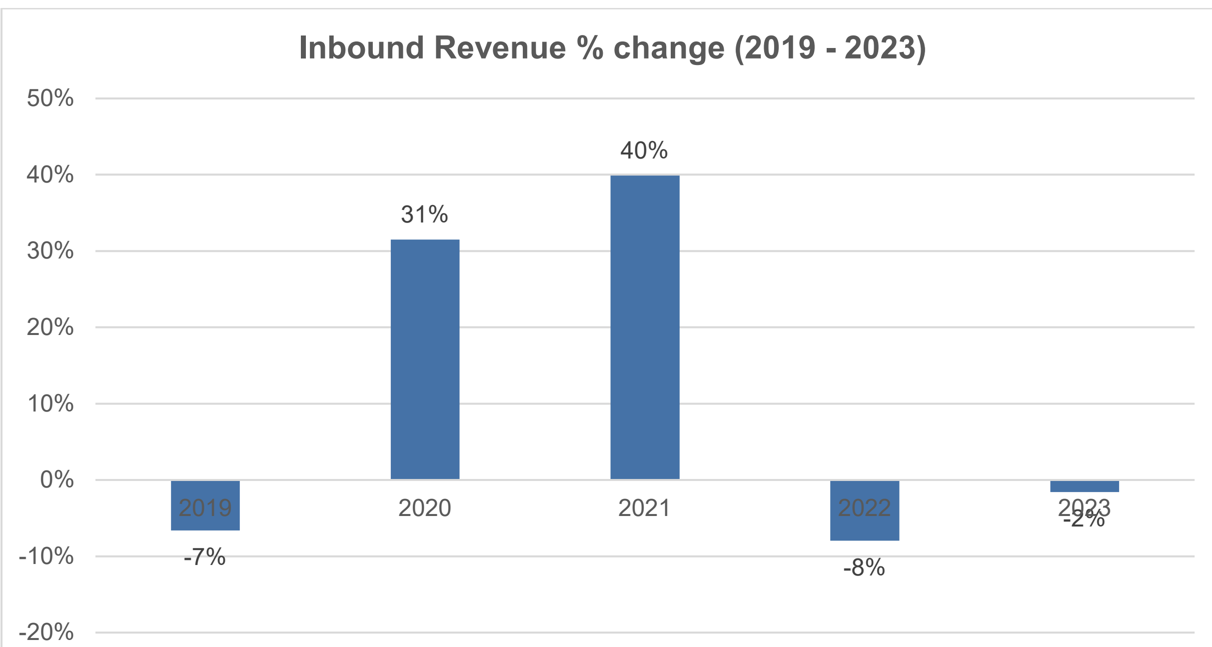


Figure 10b: Inbound Revenue % change 2019-2023



20. The revenue declines have been driven by a continued decline in volumes of 19.6m parcels being delivered in 2023 compared to peak 2021 which was during the pandemic, see Figure 11a & 11b. 2023 parcels levels are now at the same level as pre-pandemic 2019; 42m inbound parcels being delivered.

Figure 11a: Inbound Volumes 2018-2023

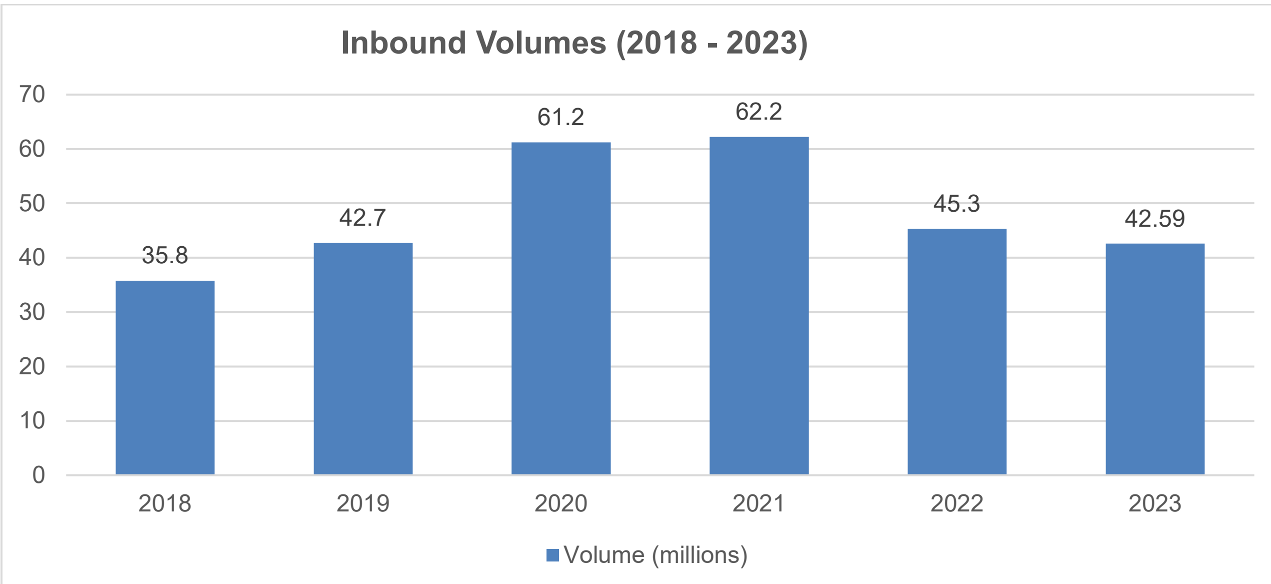
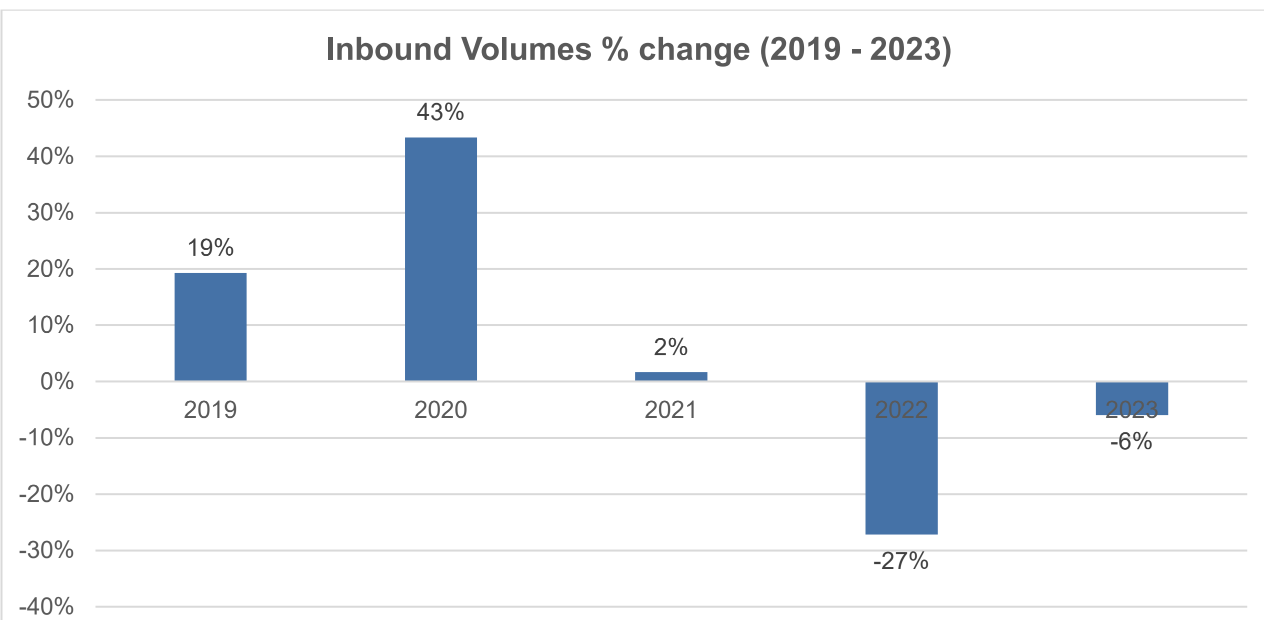


Figure 11b: Inbound Volumes % change 2019-2023



Outbound segment

21. Outbound revenue declined in 2023 by 7%, a decrease of €12.4m, see Figure 12a and 12b.

Figure 12a: Outbound Revenue 2018-2023

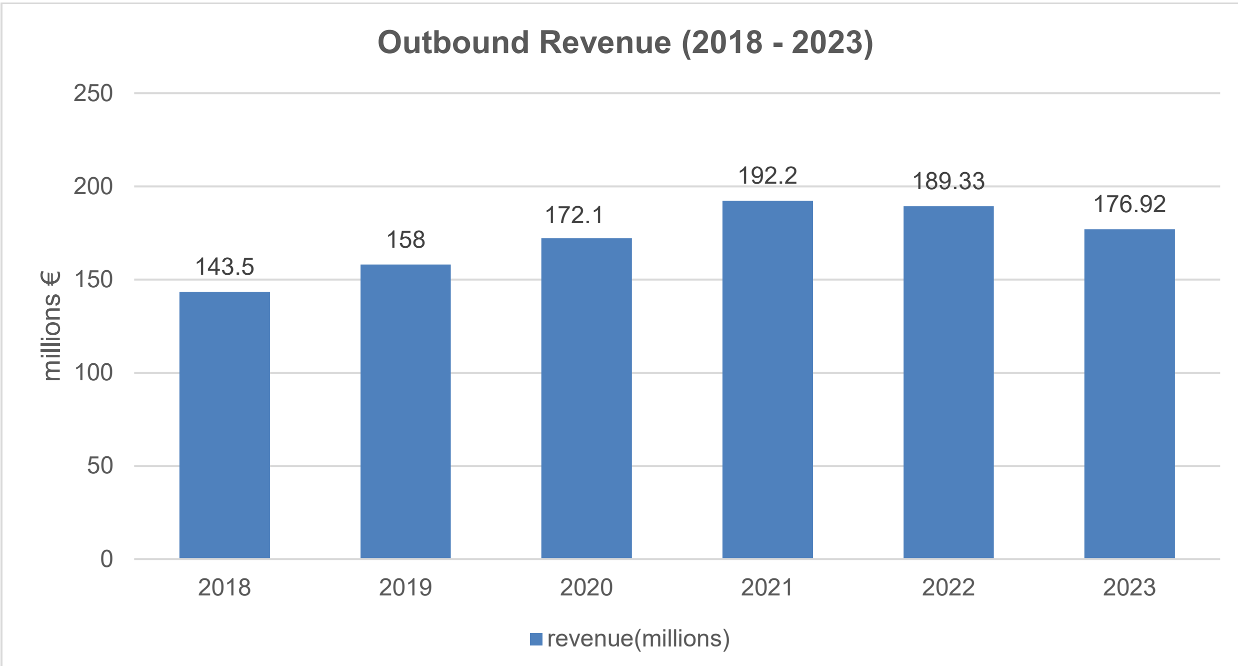
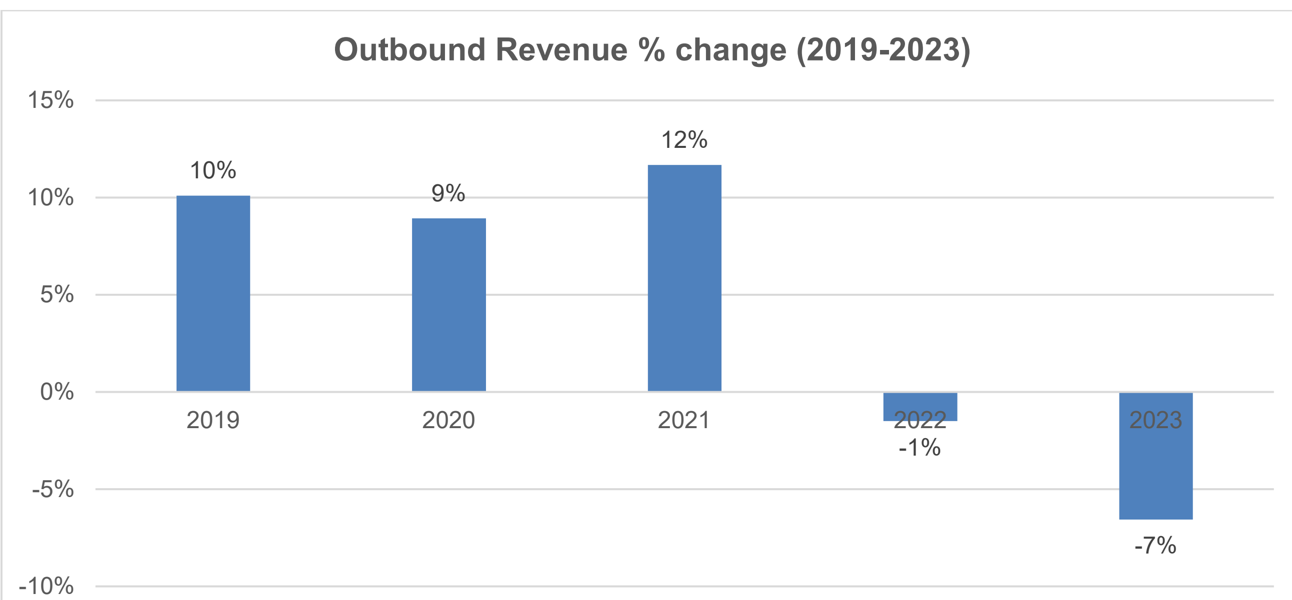


Figure 12b: Outbound Revenue % change 2019-2023



22. There was a 7% decline in Outbound volume, see Figure 13a & 13b.

Figure 13a: Outbound Volume 2018-2023

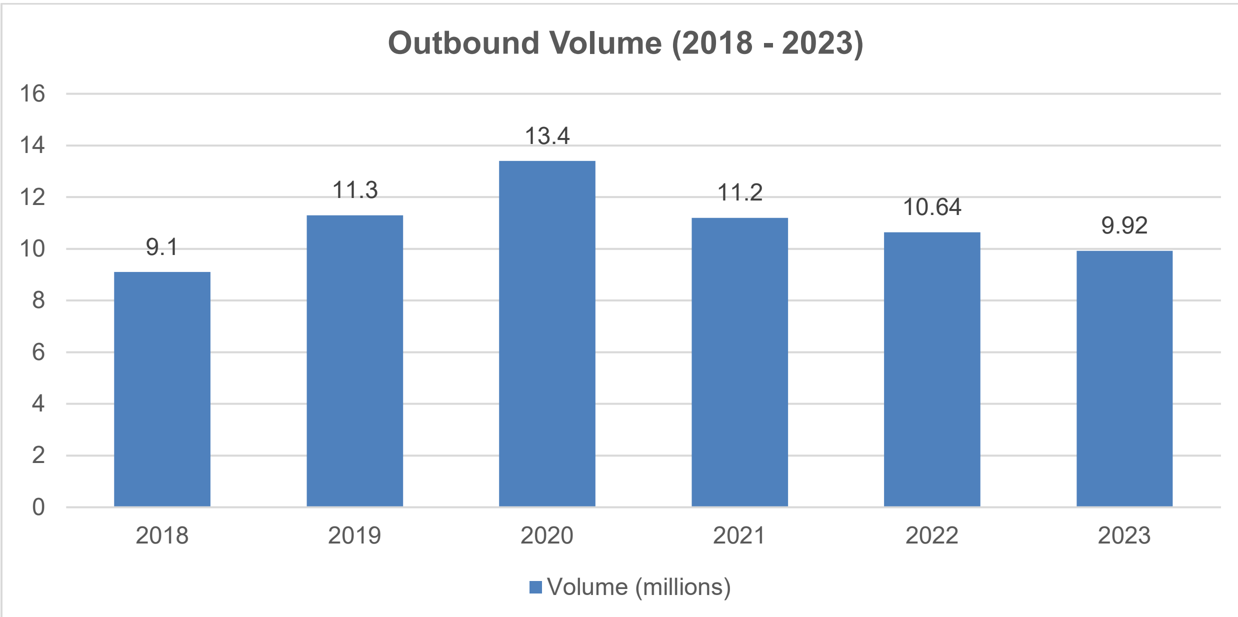


Figure 13b: Outbound Volume % change 2019-2023