An Coimisiún um
Rialáil Cumarsáide
Commission for
Communications Regulation

Parcel data for Ireland
2018 - 2022

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Content

1: Executive Summary

1. This report shares data on Irish parcels for the 5 years, 2018 – 2022[1]. This report therefore provides insights and data on the change in Irish parcel deliveries pre and post Covid 19 pandemic.

2. Data collected is from 7 declared Parcel Delivery Service Providers ("PDSPs") and the data[2] in this report is the total of these individual collections.

3. Key insights are:

   - The Covid-19 pandemic and resultant lockdowns increased parcel deliveries in 2020 and 2021.
   - With the return to normality in 2022, there was a decrease in both parcel revenue and parcel volumes in 2022 compared to 2021.
   - However, despite the decrease in the past year, parcel delivery in Ireland is still up from the pre-Covid-19 pandemic years, 2018 and 2019. Comparing 2022 to 2019 (pre-pandemic):
     - parcel delivery revenue has increased by almost €300m (by just over a half, 52%).
     - Parcel volumes has increased by 32 million parcels (30% increase), mainly in the domestic segment.
   - Total parcel revenue was €875m for 2022:
     - A decrease in total revenue of 9% (c.€87m) compared to 2021.
     - Total parcel revenue has decreased for the first time. Previously there was 26% revenue growth from 2020 to 2021, and 32% revenue growth from 2019 to 2020.

[1] Based on the data collected under the European Cross Border Parcel Regulation ("CBPR")
[2] Data is collected by (1) Domestic segment – receivers and senders in Ireland (2) Inbound segment – receivers in Ireland and the senders are abroad and (3) Outbound segment – receivers are abroad and the senders in Ireland.

Year	Revenue €m	% Increase / decrease
2022	875.13	-9%
2021	961.90	26%
2020	762.30	32%
2019	576.20	4%
2018	566.00	

- Total parcel volumes were 138.9m for 2022:
  - A decrease in total parcel volume of 14% (c.23m) compared to 2021.
  - Total volume has decreased for the first time. Previously there was a 46% growth from 2019 to 2020, slowing to 4% growth from 2020 to 2021.

Year	Vol m	% Increase / decrease
2022	138.91	-14%
2021	161.90	4%
2020	155.90	46%
2019	106.90	17%
2018	91.00	

- **Domestic** parcel delivery revenue decreased for the first time. Revenue reduced by €55.9m (13%) from €420m in 2021 to €364.10m in 2022. This was driven by a decrease in domestic volumes of 5.5m (6%) from 88.5m in 2021 to 82.97m in 2022.

  However, when comparing to pre-pandemic years, there has been a €136m (60%) increase in the domestic parcel revenue in 2022 versus 2019. There was a 30m increase in domestic parcels delivery in 2022 versus 2019.

- **Inbound** parcel deliveries from abroad declined significantly in 2022 by c.16.9m parcels (a 27% volume decline) with revenue decreasing because of this by c.€28m, from €349.69m in revenue in 2021 to €321.8m in 2022. This is a reverse in trend to previous years when volumes grew by 74% from 2018 to 2021. Inbound volumes in 2022 were 45.3 million, down significantly from 62.2 million inbound parcels in 2021.

  When comparing to pre-pandemic years, the inbound parcels contracted to near 2019 levels with 45.3 million parcels, only 6% higher than in 2019 (42.7 million parcels). However, revenue is 69% higher than in 2019.

- **Outbound** parcel delivery is the smallest segment with only 10.64 million parcels for delivery abroad in 2022. This has remained relatively static over the last five years. When comparing to pre-pandemic levels, there is minimal change in 2022 compared to 2019; however, in terms of revenue, this has increased by 20% (an additional €31m revenue).

4. The key insights must be caveated though for the following reasons:

   a. The insights and trends are based on total aggregate figures of the declared PDSPs; the trends do not necessarily reflect the individual performances of all the seven PDSPs.

   b. The insights and trends are based on the figures provided by the seven declared PDSPs only.

2: Introduction

5. This report shares data on Irish parcels for the 5 years 2018 – 2022, based on the data collected under the European CBPR[3]. CBPR data collected is from 7 declared PDSPs (there has been no change in PDSPs compared to the previous year):

Table 1 – PDSPs

PDSPs	
An Post	UPS
DPD	Fastway
DHL	GLS
Fedex	

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

7. The data presented is for the 5 years, 2018 to 2022; 2022 is the latest available data.

8. 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.

[3] 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".

3: CBPR Aggregate Data

9. The aggregate revenue and volumes information of the 7 PDSPs that submitted data from the period 2018 – 2022 is presented below. This is then split to segment: Domestic, Inbound, Outbound.

2.1 Total Revenue

10. Total revenue in 2022 for the PDSPs was €875m, a 9% decrease compared to the previous year 2021, see Figure 1a & 1b. This is a reverse on the trend seen over the period 2018 to 2021 where there was a 73% growth in revenue for these PDSPs.

11. When comparing to pre-pandemic, there has been a €299m (52%) increase in parcel delivery revenue in 2022 compared to pre-pandemic 2019.

Figure 1a

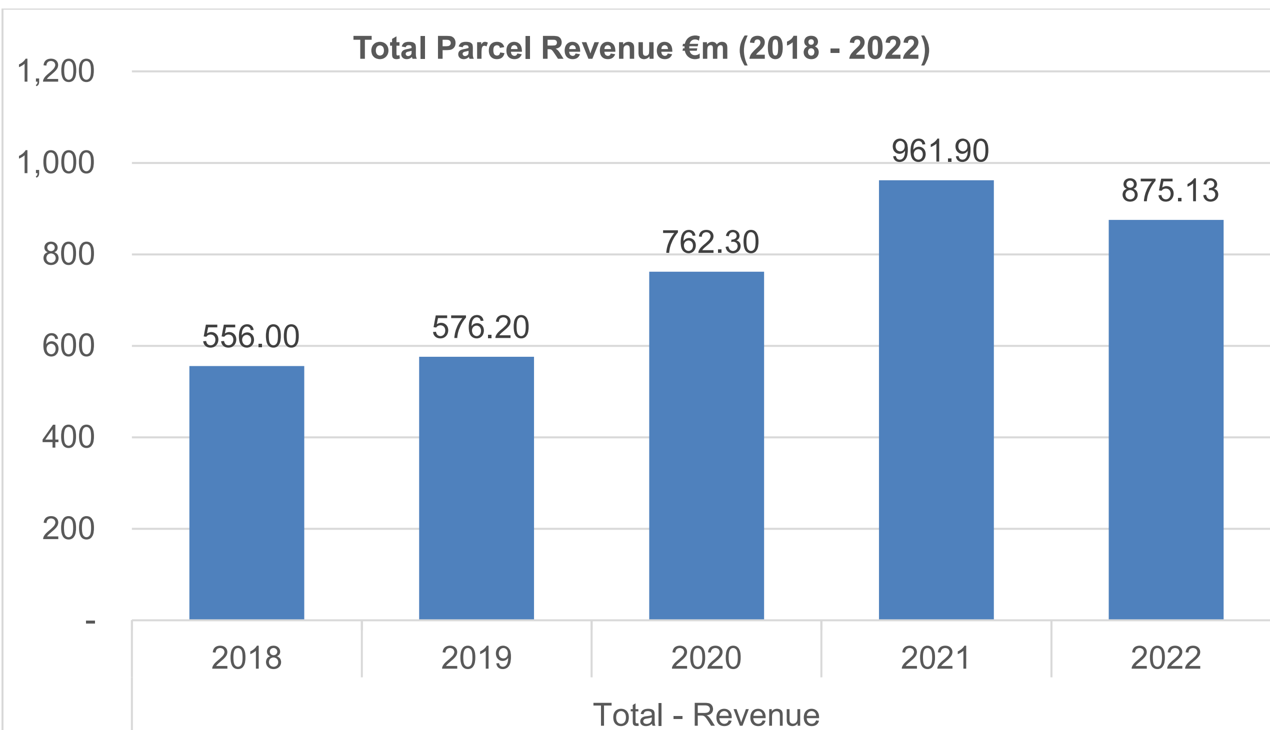
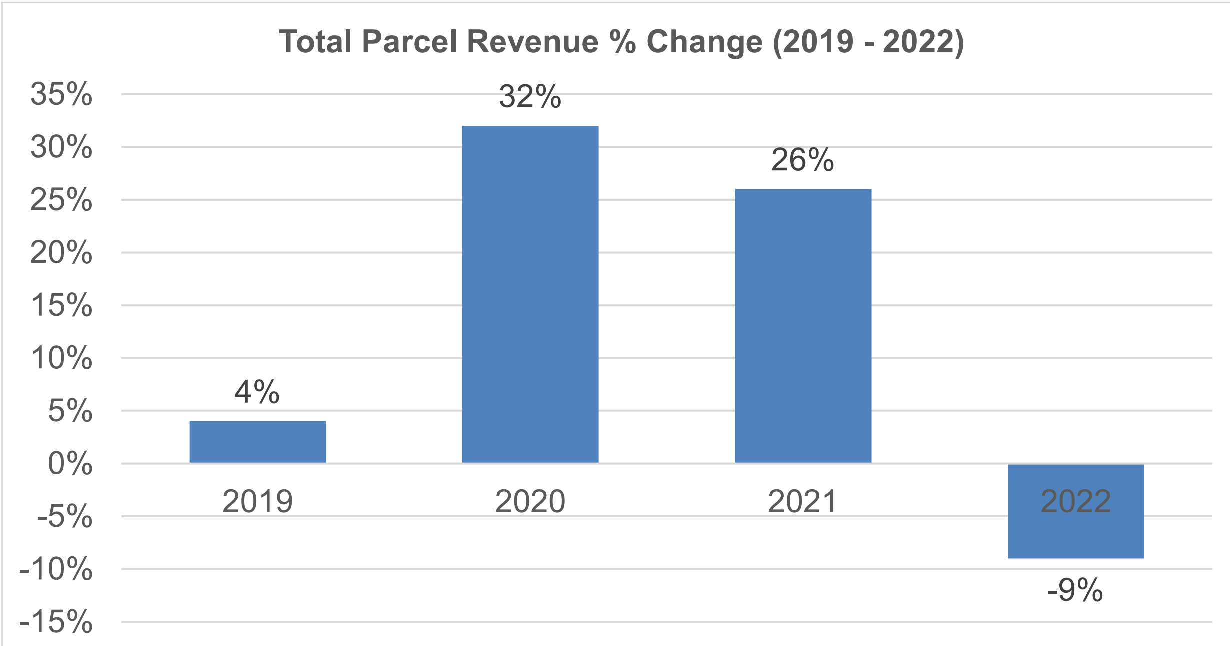


Figure 1b



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

2.2 Total Volume

12. Total volume in 2022 for the PDSPs was 138.91 million parcels. This was a 14% decrease compared to the previous year 2021, see Figure 2a & 2b. From 2018 to 2021, there was a 78% (70.9 million) increase in parcel volume. This slowed though last year with volumes increasing by only 4% (2020/2021) compared to the previous year of 46% (2019/2020).

13. When comparing to pre-pandemic volumes have increased by c.32 million (30%) in 2022 when compared to pre-pandemic 2019.

Figure 2a

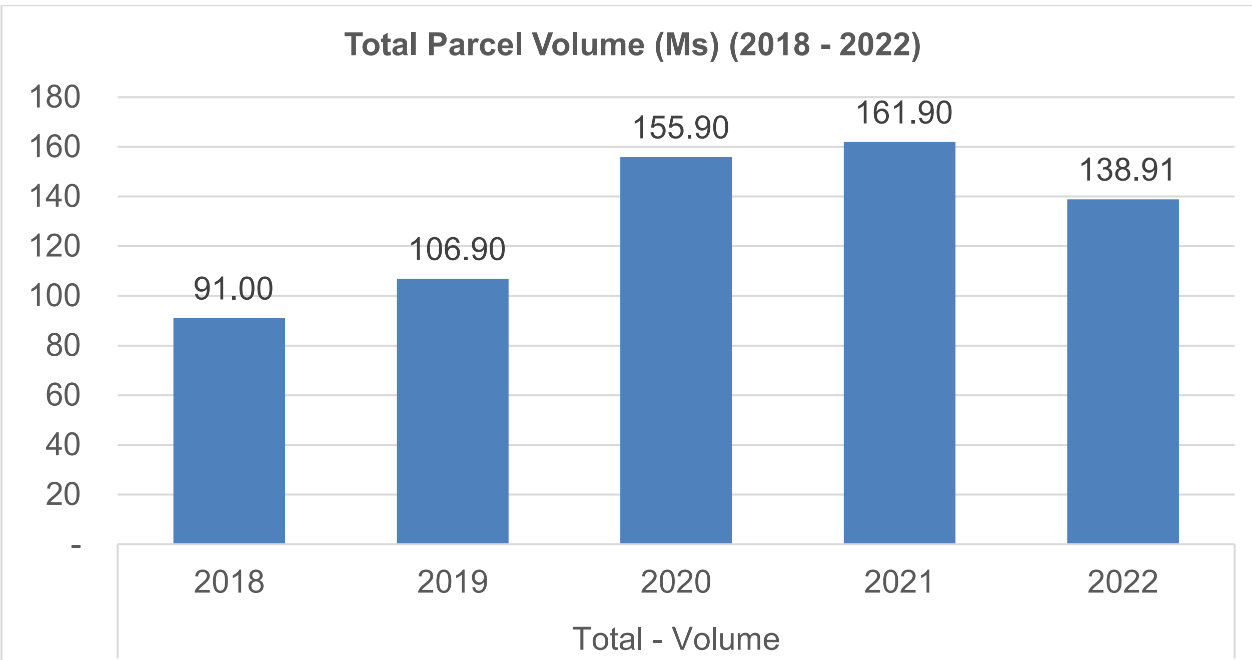
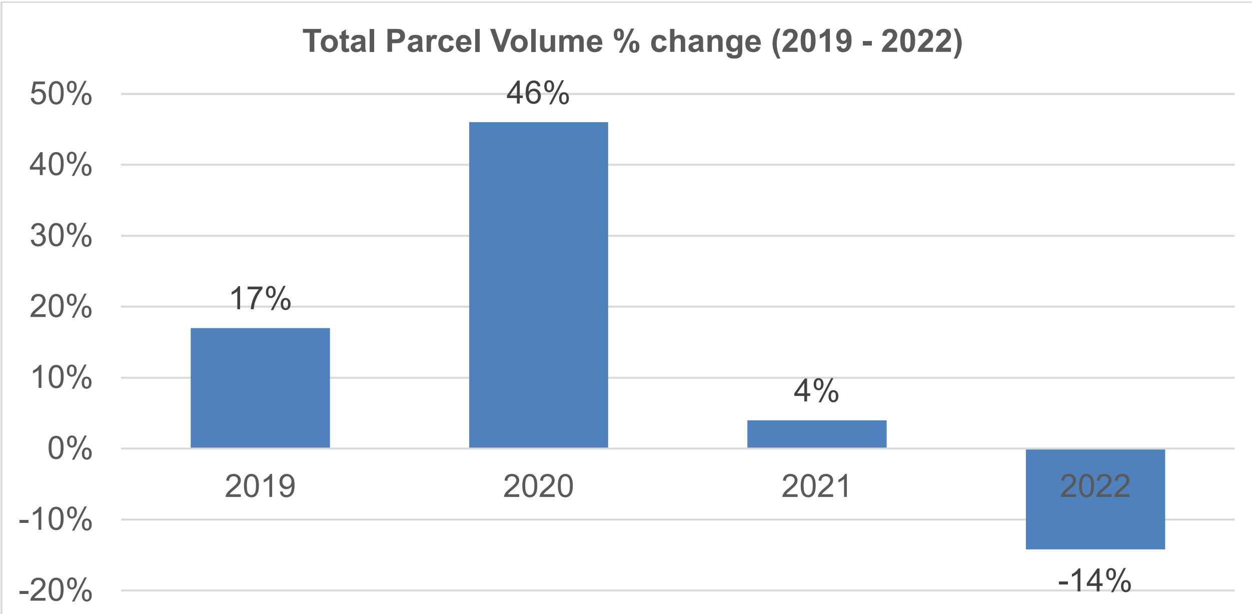


Figure 2b



Volume by year	Vol m	% Increase / decrease
2022	138.91	-14%
2021	161.90	4%
2020	155.90	46%
2019	106.90	17%
2018	91.00	

2.3 Segment Breakdown: Domestic, Inbound, Outbound

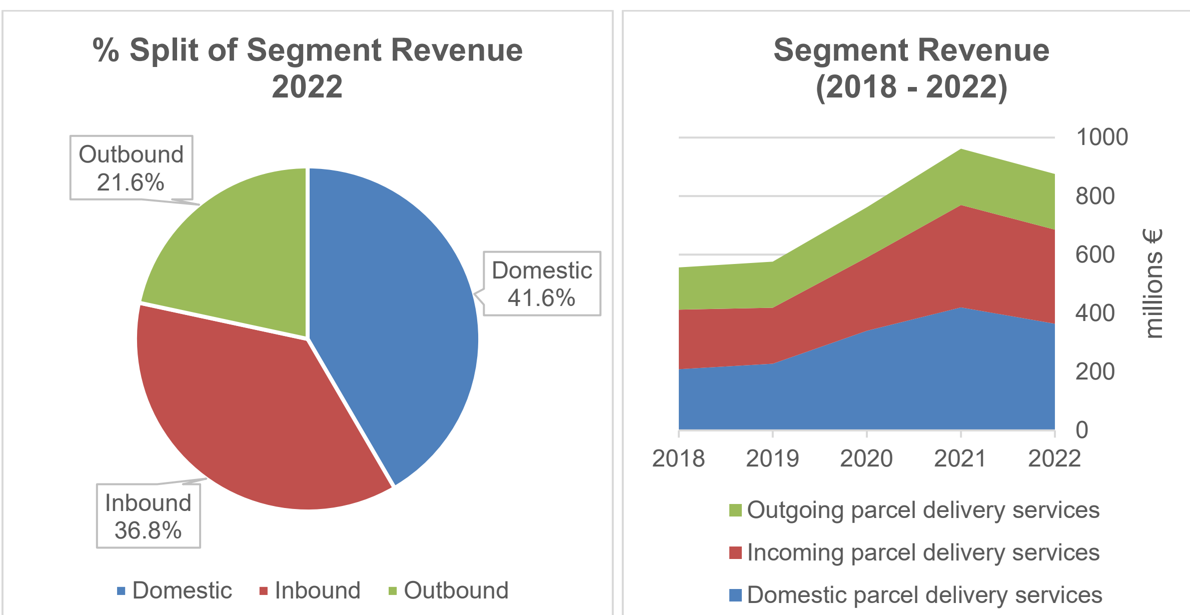
14. Revenue and volumes information collected from the PDSPs is split into the following segments as required under the CBPR:

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

15. Of total revenue, the segment share for 2022 is illustrated in the pie chart in Figure 3 below. Domestic revenue makes up a 41.6% share of total revenue, followed by international inbound with 36.8% of the share and Outbound making up the remaining 21.6%.

16. All segments had reduced revenue in 2022 compared to 2021, see Figure 4. Domestic had the greatest reduction of -€55.9m compared to the previous year, followed by Inbound of -€27.9m and then Outbound of -€2.9m.

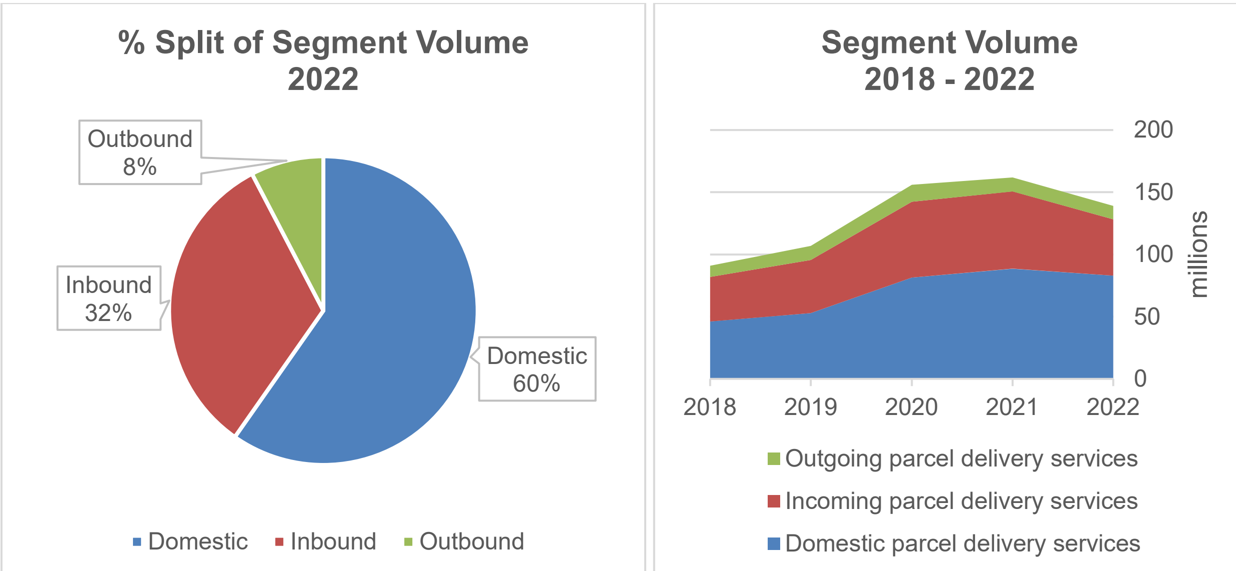
Figure 3 & 4



17. Of total volume, the segment share for 2022 is illustrated in the pie chart in Figure 5 below. Domestic makes up 60% of total volumes, followed by Inbound with 32% of the

share and Outbound making up the remaining 8%. Domestic share of parcels has grown slightly compared to the previous year, this was due to the significant reduction in the Inbound parcel segment compared to Domestic and Outbound segments, see Figure 6.

Figure 5 & 6



18. A summary of each segment from 2018 to 2022 is shown below, see Figure 7a & 7b.

Figure 7a

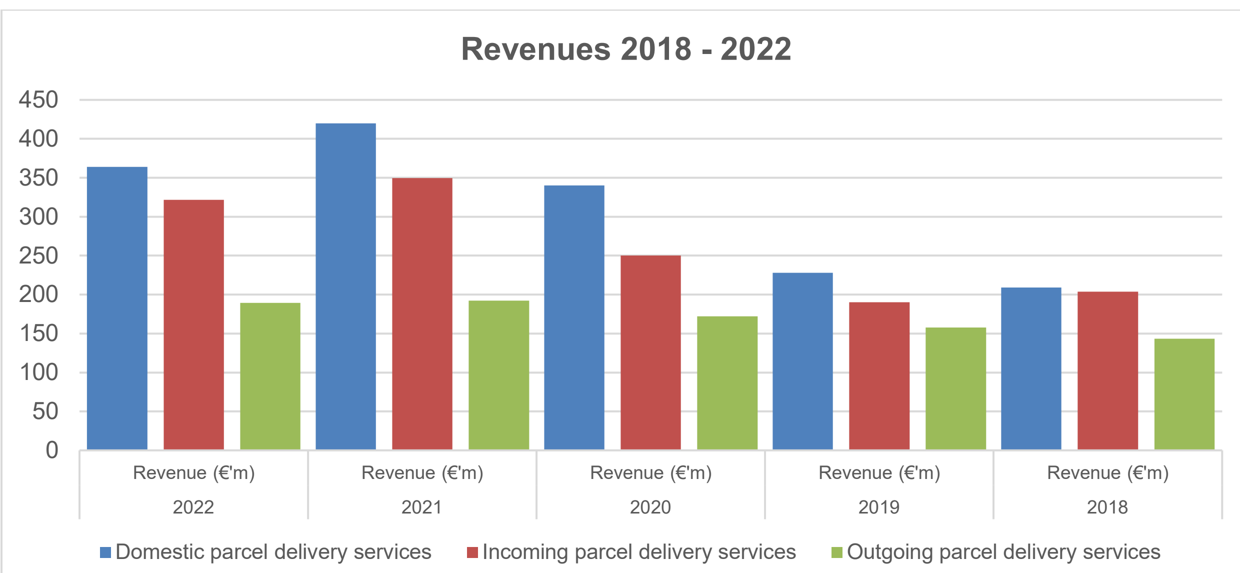
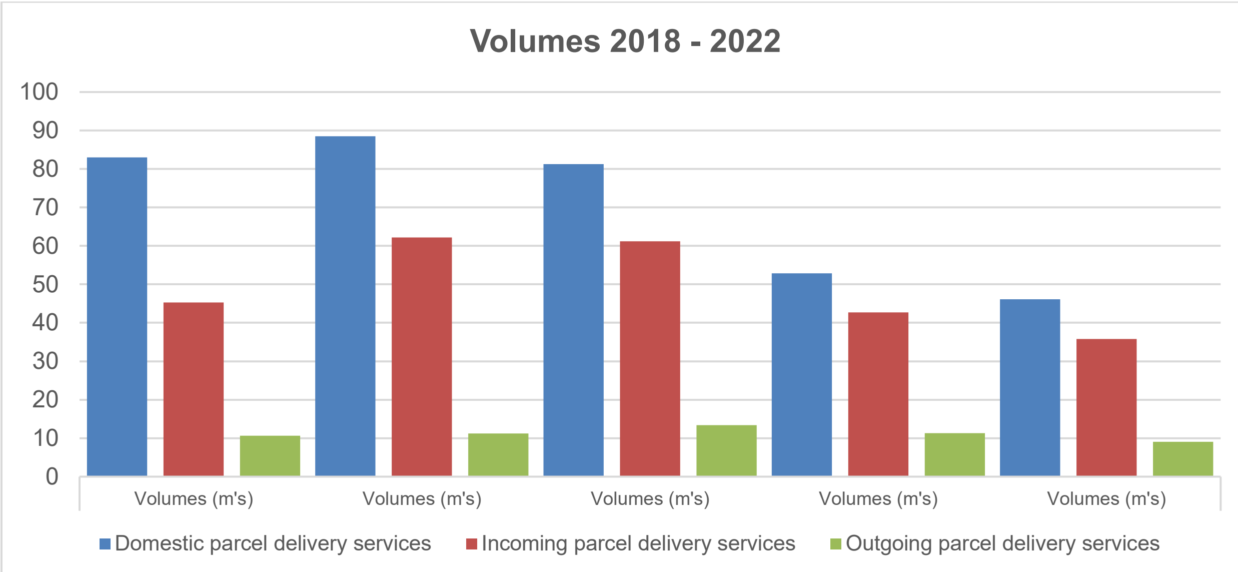
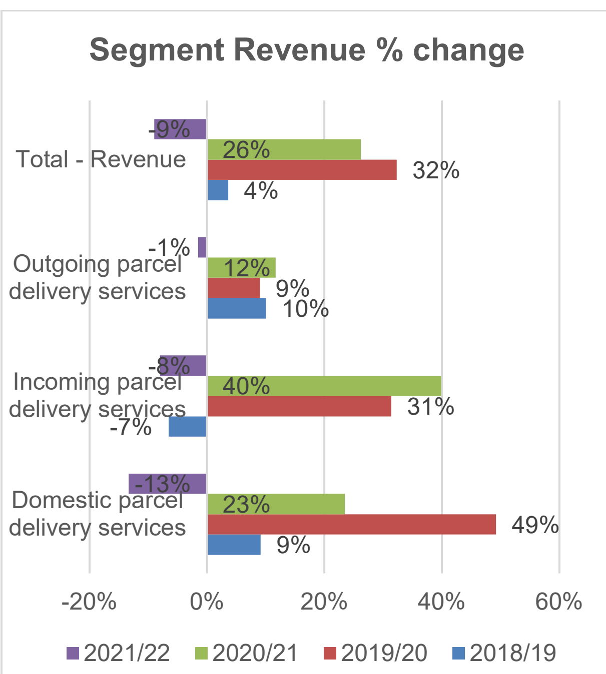


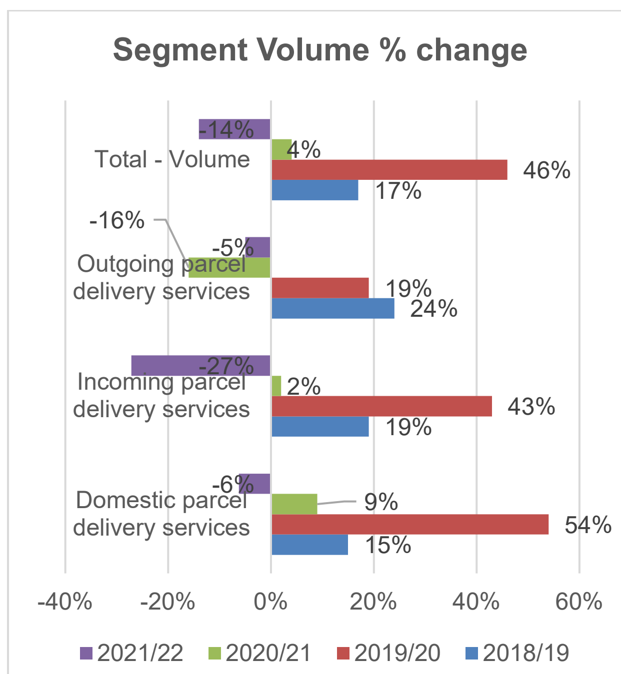
Figure 7b



19. The reduction in parcel volumes growth has continued into 2022 with volumes declining for all segments; Domestic and Inbound volumes have declined for the first time since 2018. This has driven a loss in aggregate revenue of c.€86.7m for the seven declared PDSPs in 2022.

Figure 8a & 8b





20. When considering the change in the parcel deliveries pre-pandemic versus post-pandemic, the segments have performed differently, see Figures 9a and 9b. All segments have grown significantly in terms of revenue generation, between 20% to 69%. However, only the domestic segment has had significant volume and revenue growth.

Figure 9a

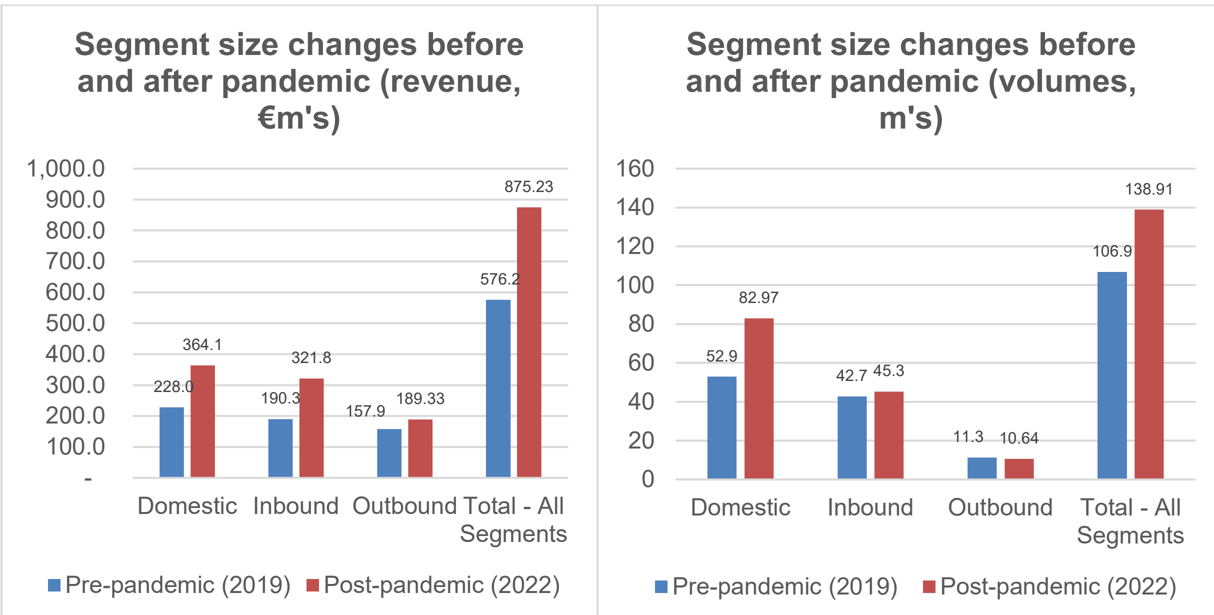
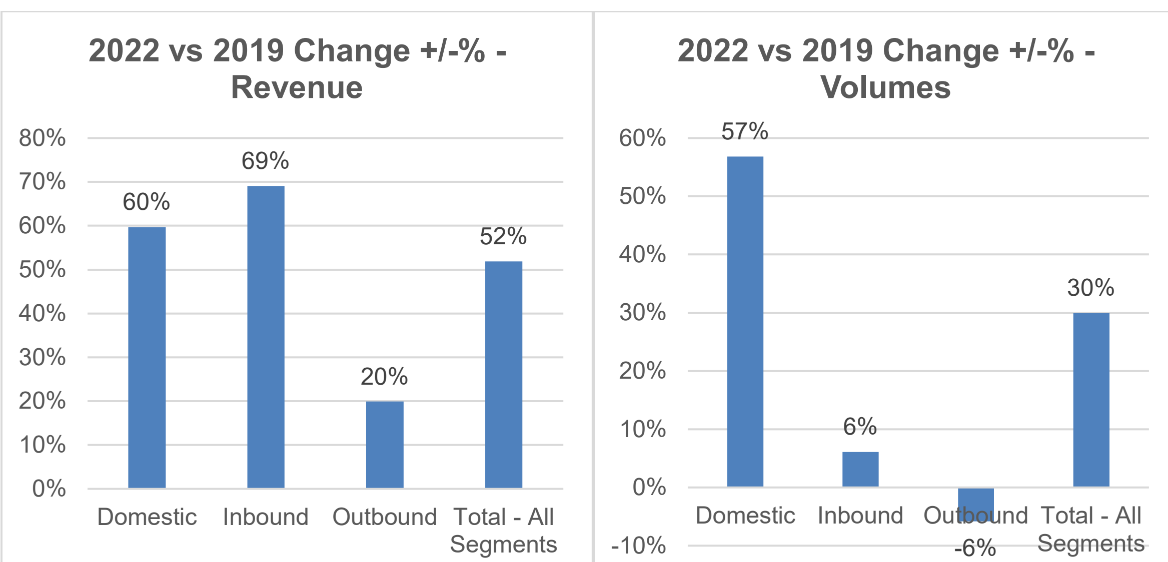


Figure 9b



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

Domestic segment

22. Domestic revenue has decreased for the first time since 2018. This equates to a reduction in revenue of c.€55.7m in revenue for 2022 compared to 2021, see Figure 10a & 10b.

Figure 10a

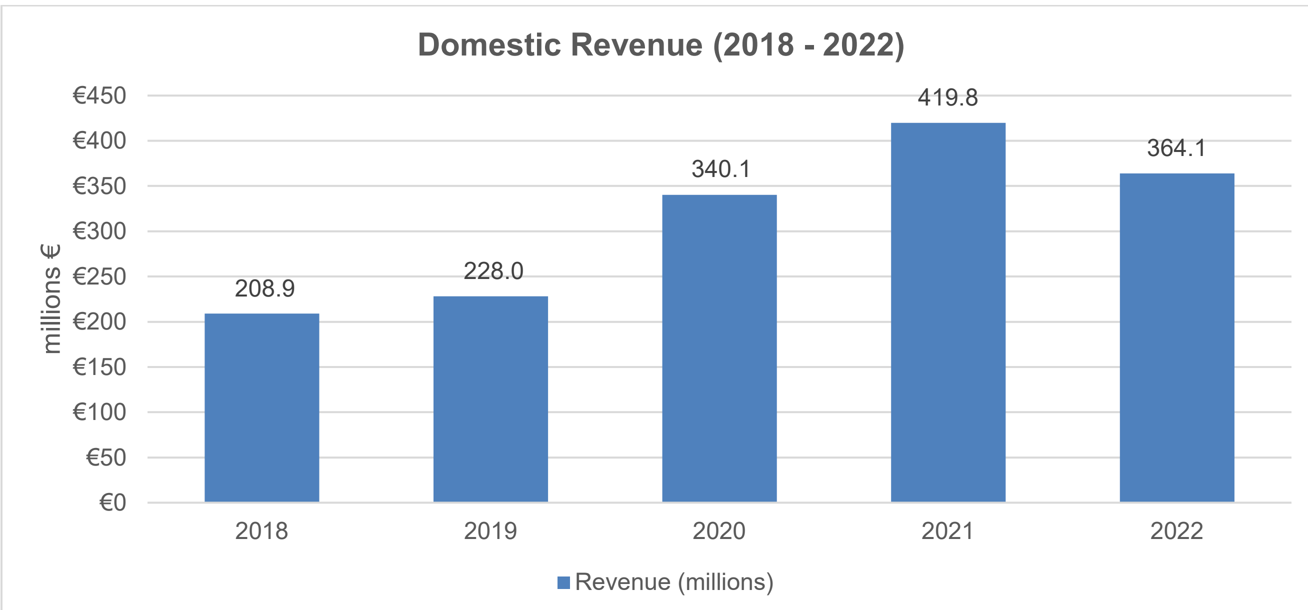
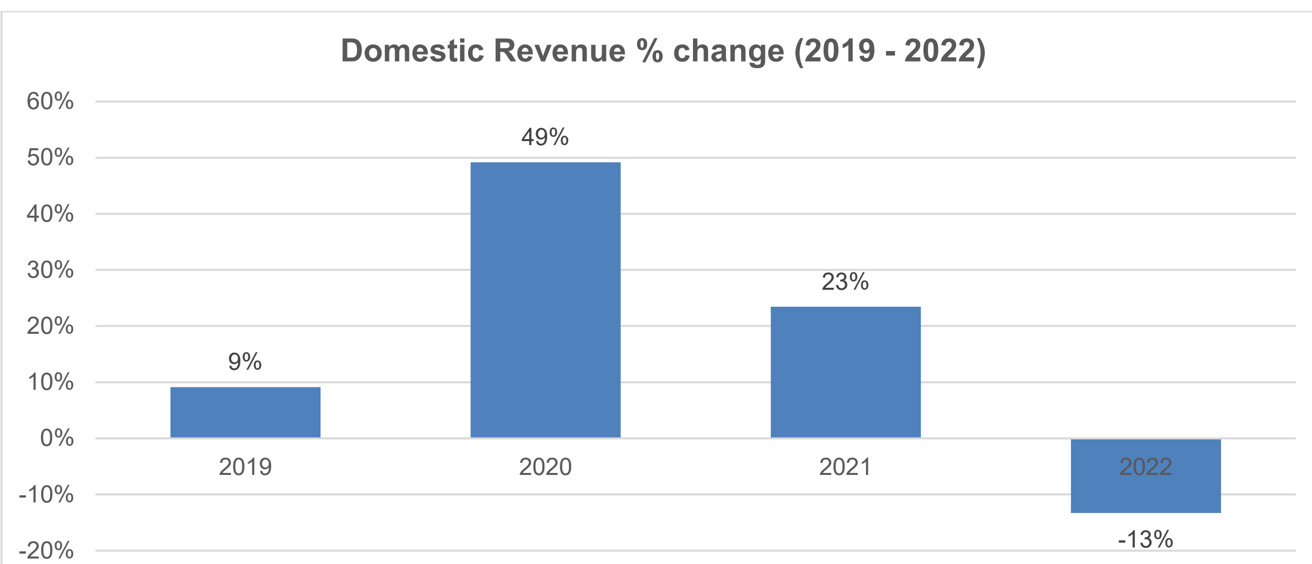


Figure 10b



23. The loss in revenue has been driven by a 6% decline in Domestic parcel volume in 2022. This continues a further decline in Domestic volume growth which was at its height in 2019/2020 at a 54% growth rate and then reducing to 9% last year.

Figure 11a

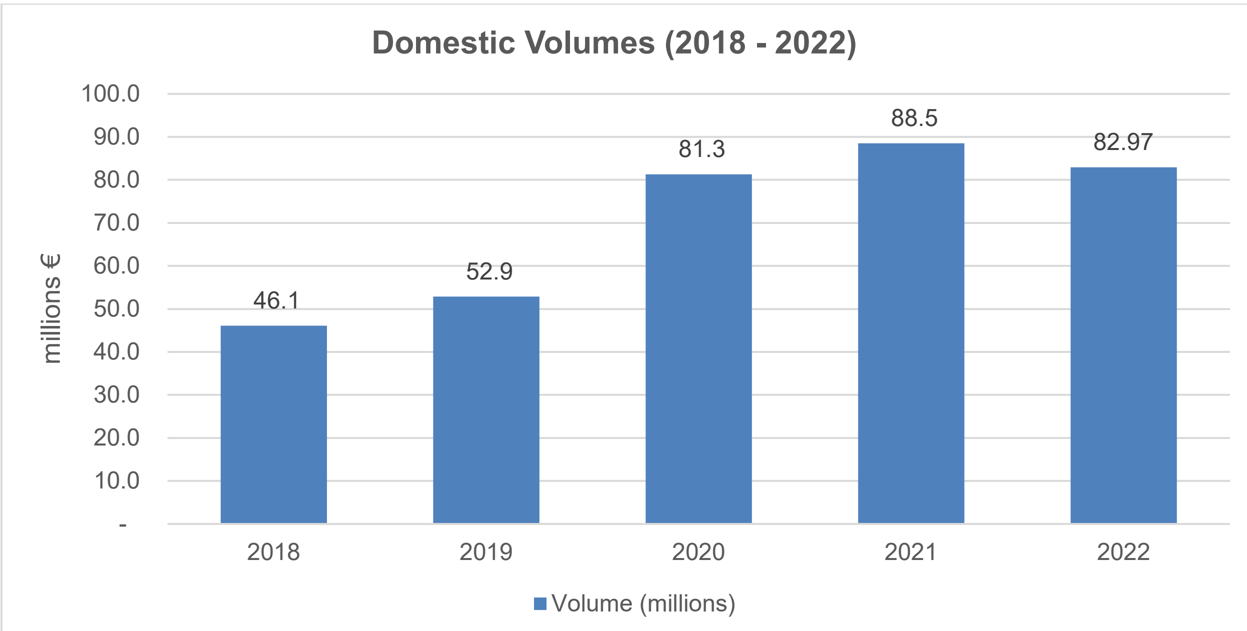
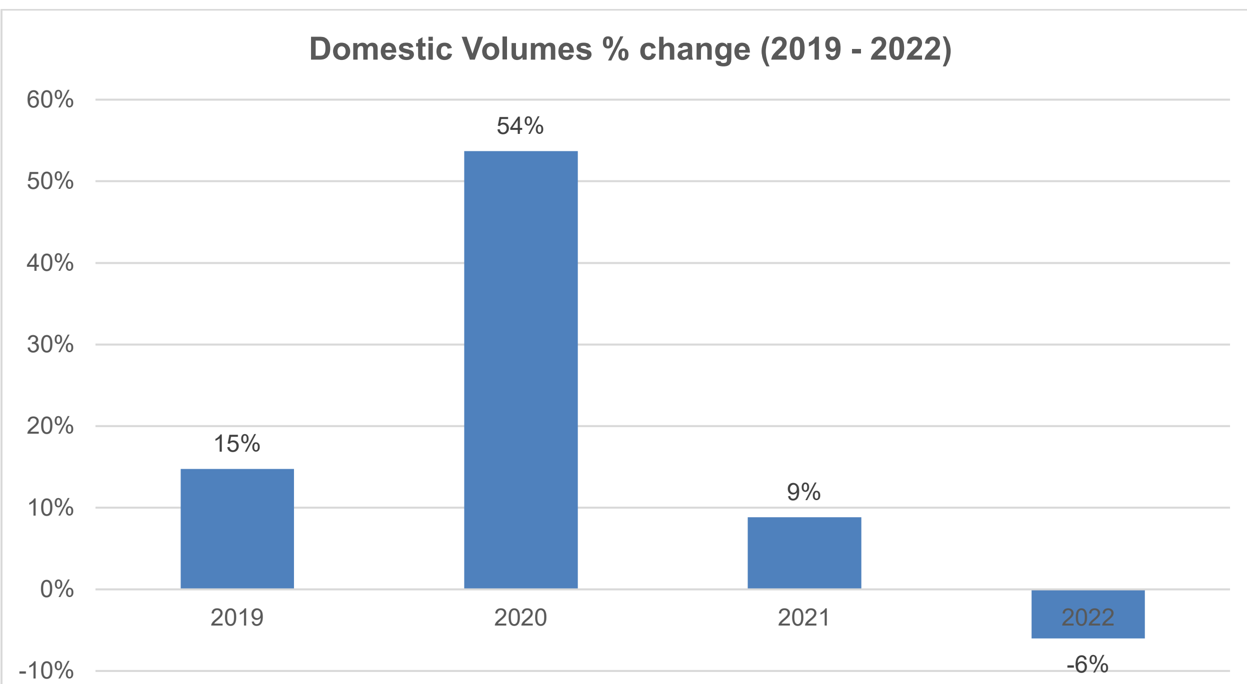


Figure 11b



Inbound segment

24. Inbound revenue dropped from €349.7m in 2021 to €321.8m in 2022, see Figure 12a & 12b. This was a significant decline in revenue performance compared to the previous two years which saw a 31% increase in revenue from 2019 to 2020 and a 40% increase from 2020 to 2021.

Figure 12a

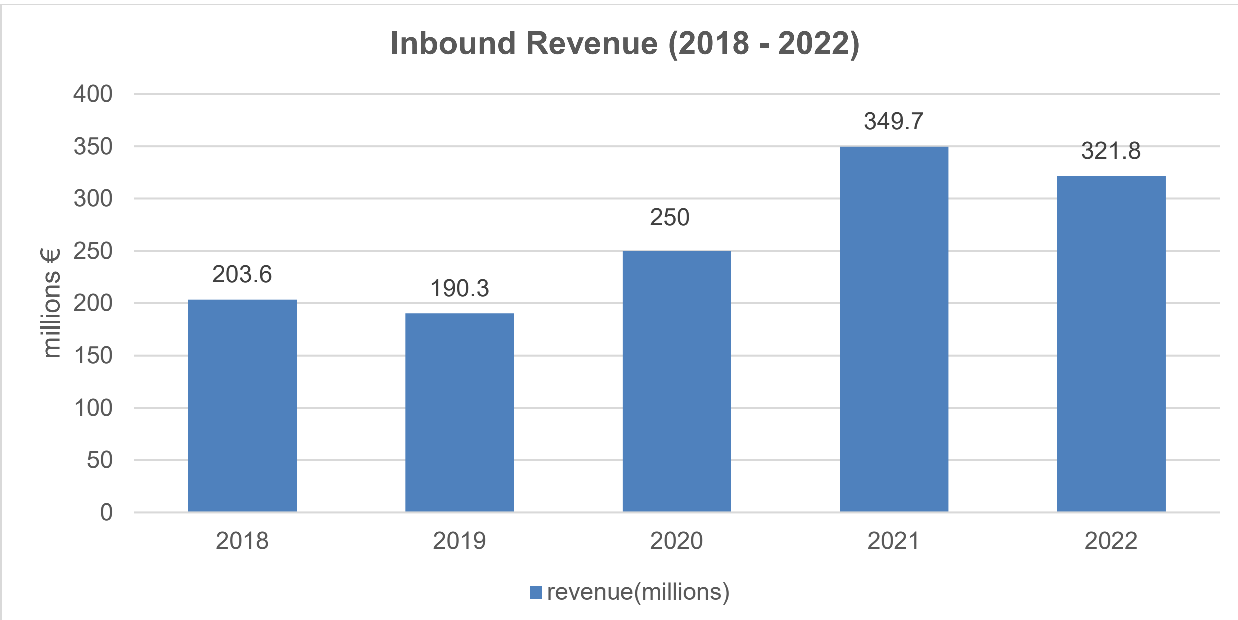
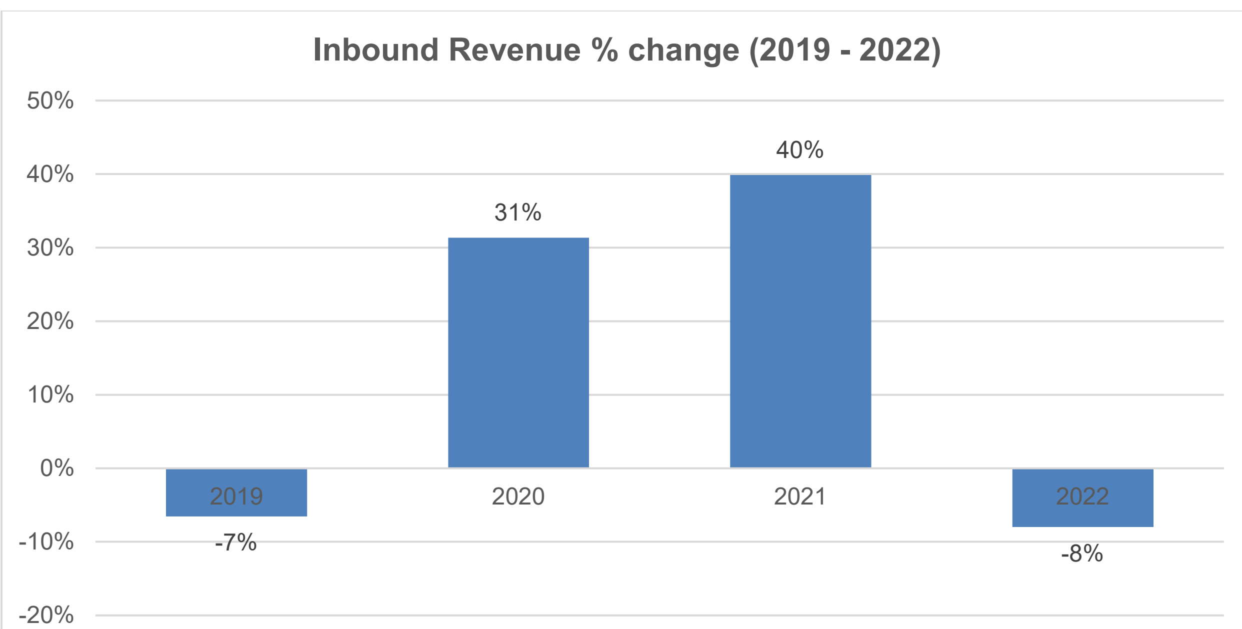


Figure 12b



25. The revenue declines have been driven by a significant decline in volumes of c.16.9m parcels in 2022, see Figure 13a & 13b. In the previous two years, volumes had been static at c.62million parcels for 2020 and 2021.

Figure 13a

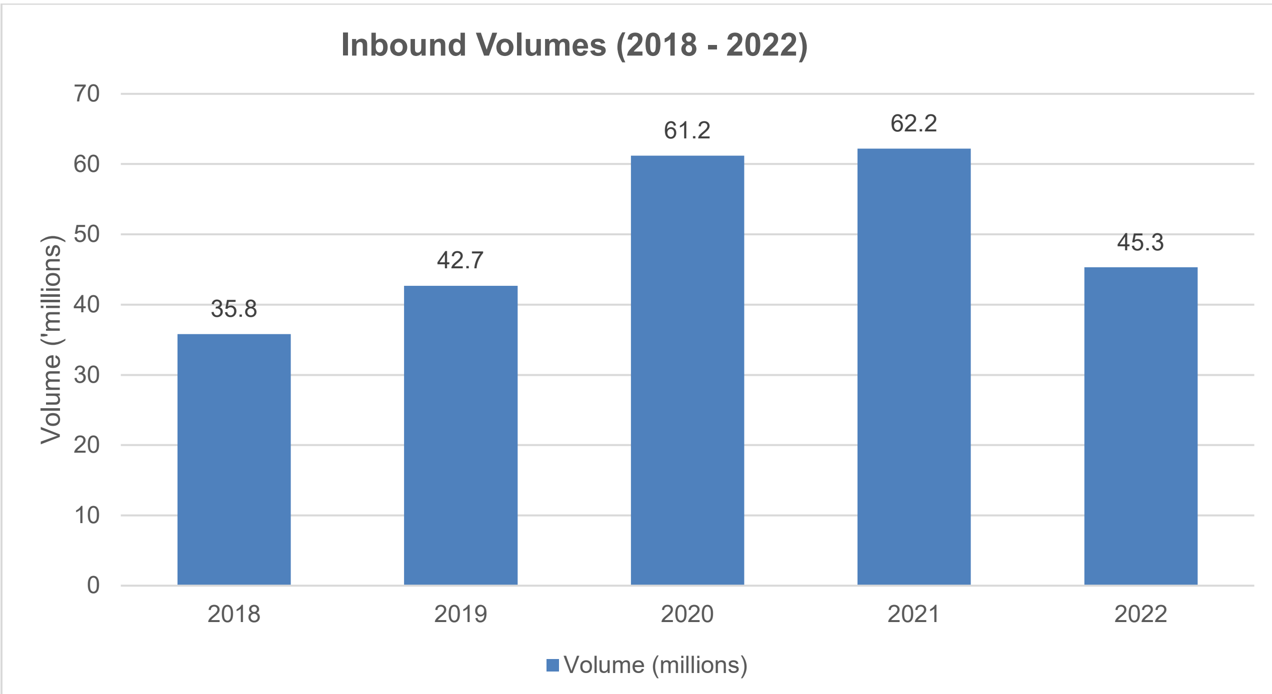
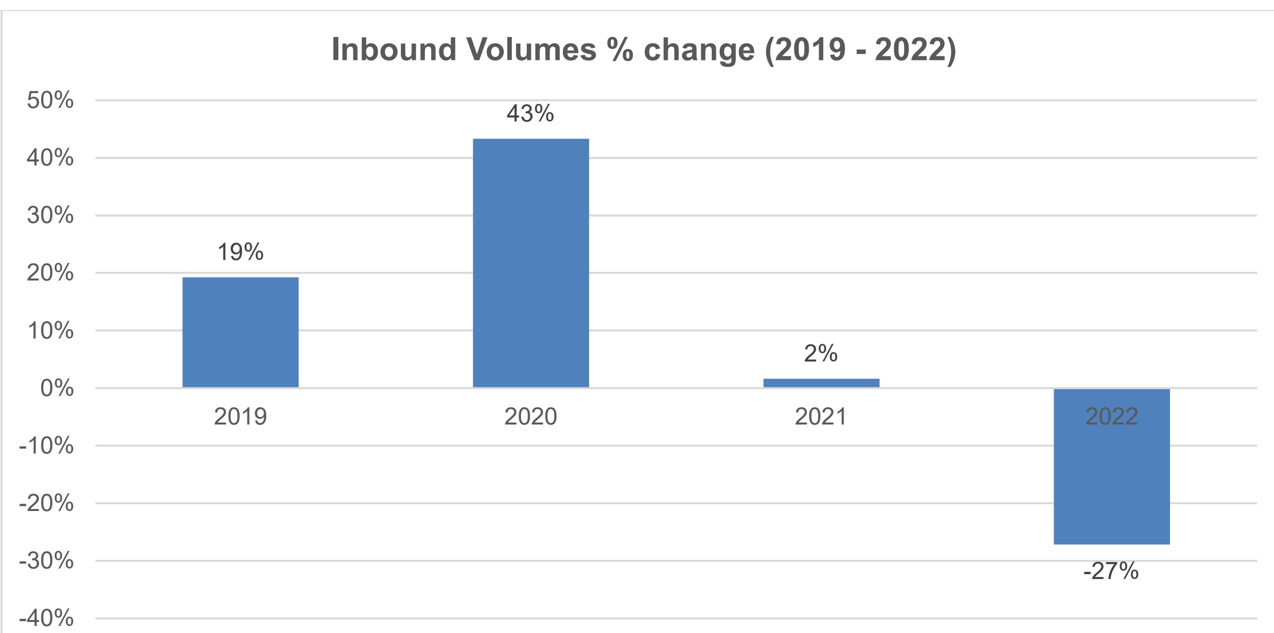


Figure 13b



Outbound segment

26. Outbound revenue stayed relatively static for 2022 with only a 1% decrease in revenue compared to 2021, c.€2.8m, see Figure 14a and 14b.

Figure 14a

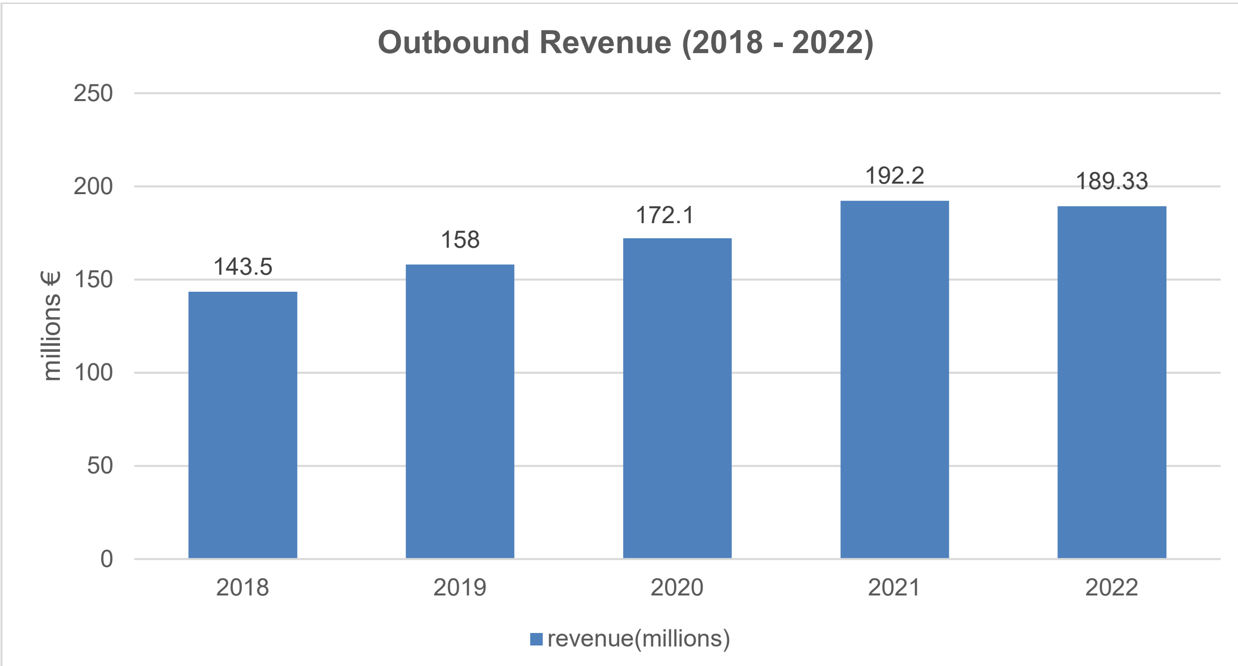
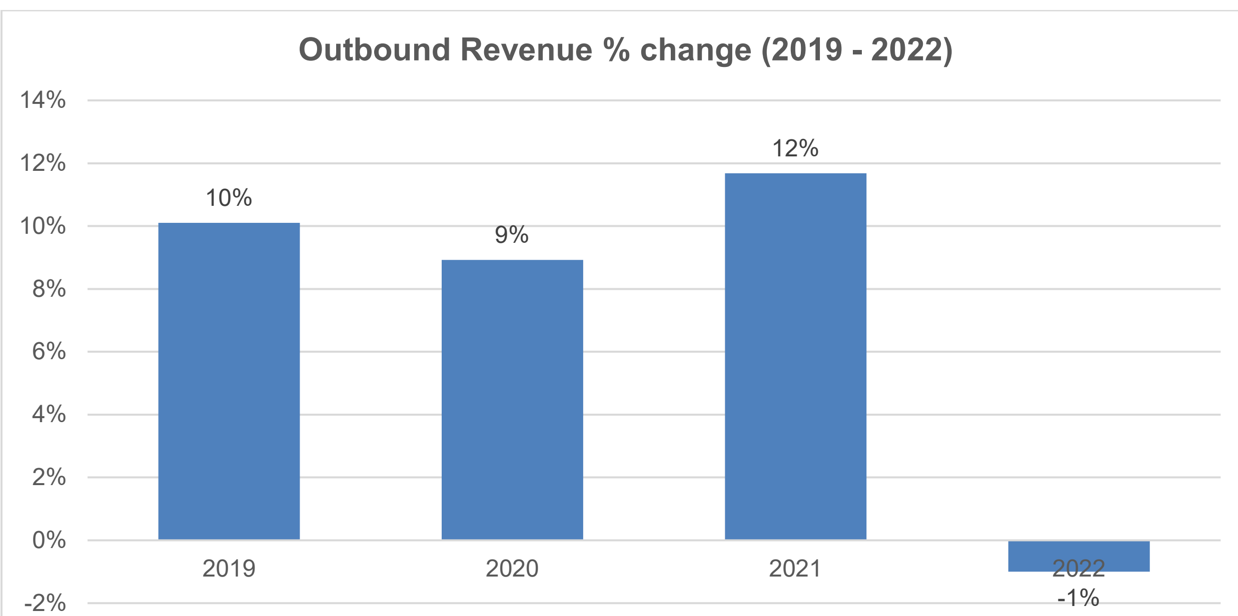


Figure 14b



27. Like revenue, volumes have been relatively consistent to the previous year, see Figure 15a & 15b. Volumes on average have been at c.11 million parcels since 2018.

Figure 15a

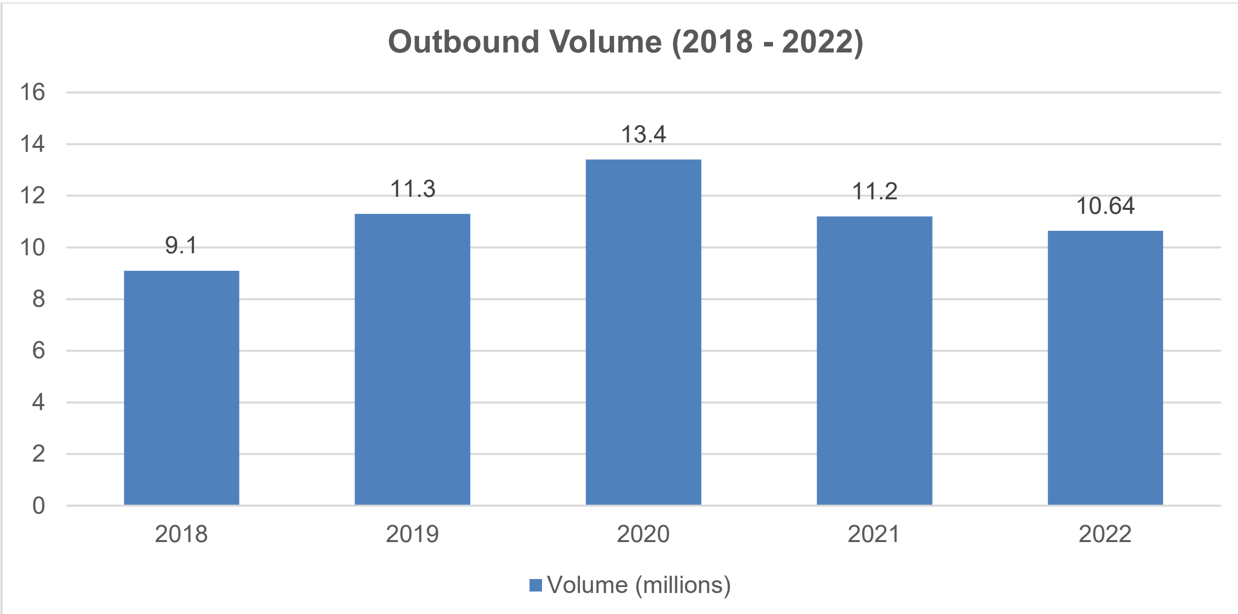
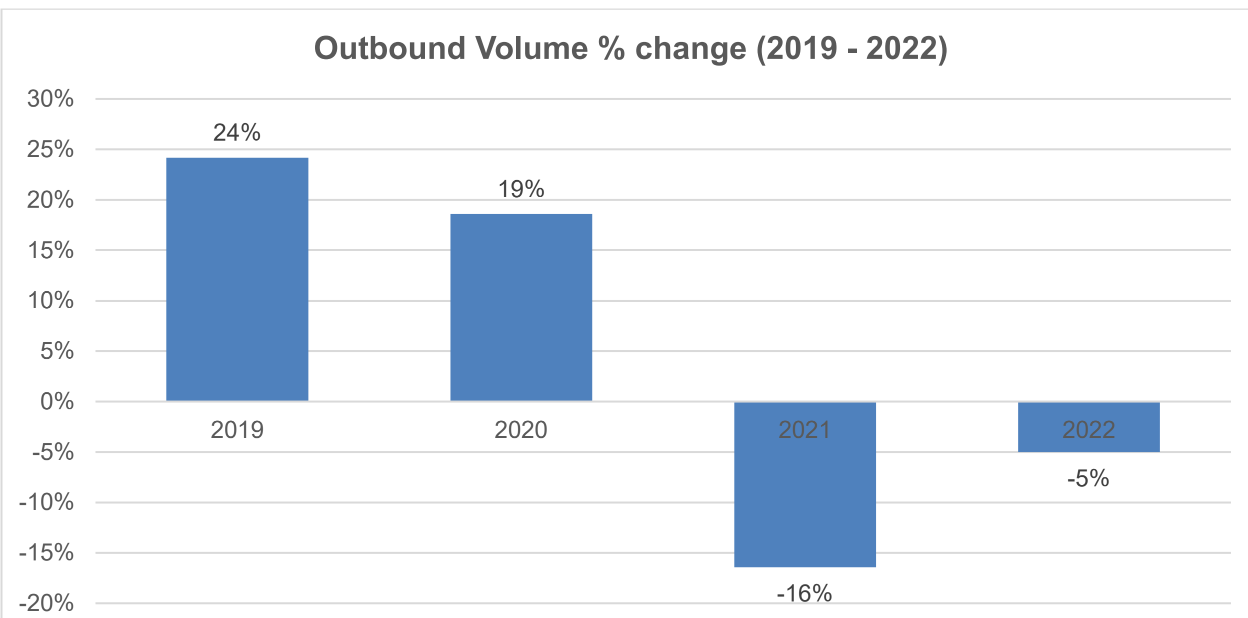


Figure 15b



3 Key findings

28. ComReg has produced this report to provide aggregate data on parcel delivery in Ireland and to inform on key trends for Irish parcels based on the data obtained under the CBPR for the 5 years, 2018 to 2022.

29. The key findings from this aggregate data are as follows:

- Parcel revenue for the seven PDSPs declined by 9% to €875m in 2022 when compared to 2021.

- 41.6% of the revenue share was for domestic parcel delivery (inbound 36.8% & outbound 21.6%) in 2022.

- 138.91 million parcels were delivered by these PDSPs in 2022 across all segments (a decline of 14% compared to the previous year).

- Segments (domestic / inbound / outbound) performed differently in 2022 versus 2021:

  - Domestic parcel delivery revenue reduced by 13% in 2022, a decline of €55.7m. This was driven by a 6% decline in volumes, with 5.5 million fewer domestic parcels being delivered in 2022.

  - Inbound parcel delivery revenue reduced by c.€27.9m, a reduction of 8%. This was driven by a reduction of 27% in inbound mail volumes, with 16.9 million fewer parcels being delivered from abroad to a destination in Ireland.

  - Outbound parcel delivery continues to be the smallest segment with only 10.64 million parcels being delivered abroad which is consistent with the average outbound volumes sent over the last five years.

- Comparing 2022 to pre-Covid pandemic 2019, the main findings are:

  - An additional €299m revenue in 2022 compared to 2019.

  - 32 million more parcels in 2022 compared to 2019 (mainly in the domestic segment).

  - The domestic segment had revenue growth of 60% and parcel volume increased by 57%.

- The inbound segment had revenue growth of 69%. However, volumes in 2022 are back to being at near 2019 levels.

- The outbound segment had revenue growth of 20%. However, volumes have remained relatively static since 2019.

30. The key findings must be caveated though for the following reasons:

- The insights and trends are based on total aggregate figures of the declared PDSPs; the trends do not necessarily reflect the individual performances of all the seven PDSPs.

- The insights and trends are based on the figures provided by the seven declared PDSPs only.