

Central And Eastern Europe Courier, Express, And Parcel (CEP) Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> ****Industry:**** Express, CEP & Last-Mile Delivery (Logistics & Supply Chain)
> ****Source:**** https://www.mordorintelligence.com/industry-reports/central-and-eastern-europe-courier-express-and-parcel-cep-market
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Executive Market Summary

Market Metric	Details
Base Market Size	USD 15.71 billion
Projected Forecast (2031)	USD 15.71 billion
Growth Rate (CAGR)	3.24 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

!Major players in Central And Eastern Europe Courier, Express, And Parcel (CEP) industry](images/chart_2.png)

!Central and Eastern Europe Courier, Express, and Parcel (CEP) Market (2025 - 2030)](images/chart_3.png)

!Central and Eastern Europe Courier, Express, and Parcel (CEP) Market: Market Share by End User Industry, 2025](images/chart_4.png)

!Central and Eastern Europe Courier, Express, and Parcel (CEP) Market: Market Share by Shipment Weight, 2025](images/chart_5.png)

!Central And Eastern Europe Courier, Express, And Parcel (CEP) Market](images/chart_6.png)

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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period | 2018 - 2031 |
Forecast Data Period | 2026 - 2031 |

Base Year Market Size (2025) | USD 15.22 Billion |

Market Size (2026) | USD 15.71 Billion |

Market Size (2031) | USD 18.43 Billion |

Growth Rate (2026 - 2031) | 3.24 % |

Market Concentration | Medium |

Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Central And Eastern Europe Courier, Express, And Parcel (CEP) Market Analysis by Mordor Intelligence

The Central and Eastern Europe courier, express, and parcel (CEP) market size in 2026 is estimated at USD 15.71 billion, growing from 2025 value of USD 15.22 billion with 2031 projections showing USD 18.43 billion, growing at 3.24% CAGR over 2026-2031. A hub position linking Western Europe with high-growth eastern corridors, combined with EU-backed infrastructure upgrades, is amplifying demand for reliable parcel flows. Explosive online shopping, the roll-out of automated parcel lockers, and near-shoring of fulfillment centers are compressing delivery windows while stimulating technology adoption in sortation and route planning. Simultaneously, dual-use military mobility funding is accelerating rail and road enhancements, reinforcing the Central and Eastern Europe courier, express, and parcel (CEP) market as an indispensable bridge for intra-EU trade. Competitive intensity is moderate: global integrators invest in automation at regional hubs, yet local champions leverage proximity advantages to extend out-of-home networks. Structural headwinds driver shortages, capacity-constrained airports, and fragmented ADR compliance compel operators to innovate through electrified fleets and AI-driven planning tools.

Key Report Takeaways

- * By destination, domestic deliveries led with 65.12% of the Central and Eastern Europe courier, express, and parcel (CEP) market share in 2025; international services are projected to grow at a 3.46% CAGR between 2026-2031.
- * By speed of delivery, non-express deliveries accounted for 75.78% of the Central and Eastern Europe courier, express, and parcel (CEP) market size in 2025; express services are advancing at a 3.86% CAGR between 2026-2031.
- * By model, business-to-consumer (B2C) deliveries represented a 51.74% share in 2025; consumer-to-consumer (C2C) transactions are forecast to record a 2.94% CAGR between 2026 and 2031.
- * By shipment weight, light parcels captured a 65.05% share in 2025; heavy parcels are projected to expand at a 2.72% CAGR between 2026-2031.
- * By mode of transport, road held 50.92% share in 2025; air shipments are expected to rise at a 2.81% CAGR between 2026-2031.
- * By end user industry, e-commerce drove 41.68% revenue share in 2025; healthcare is set to grow at a 3.47% CAGR between 2026-2031.
- * By country, Poland dominated with a 29.41% share in 2025; Bulgaria is poised to register the highest 3.72% CAGR over 2026-2031.

Key Market Trends

Central And Eastern Europe Courier, Express, And Parcel (CEP) Market Trends and InsightsDrivers Impact Analysis*

Driver | (~) % Impact on CAGR Forecast | Geographic Relevance | Impact Timeline |

Explosive B2C e-commerce volumes post-COVID | +0.8% | Poland, Czech Republic, Hungary with spillover to Romania, Bulgaria | Short term (≤ 2 years) |

EU cohesion-funded road and rail upgrades slash transit times | +0.6% | Romania, Poland, Bulgaria, Slovakia with TEN-T corridor focus | Medium term (2-4 years) |
Rapid parcel-locker roll-outs boosting OOH delivery density | +0.5% | Poland, Czech Republic, Hungary expanding to Baltic states | Short term (≤ 2 years) |
Cross-border SME export surge within EU's single market | +0.4% | Poland, Czech Republic, Hungary as export hubs to Western Europe | Medium term (2-4 years) |
Near-shoring of EU fulfillment hubs to CEE | +0.3% | Poland, Czech Republic, Romania as primary beneficiaries | Long term (≥ 4 years) |
EV-focused last-mile subsidies lowering cost per stop | +0.2% | Urban centers in Poland, Czech Republic, Hungary | Medium term (2-4 years) |
Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The Central and Eastern Europe courier, express, and parcel (CEP) market is moderately consolidated and hosts a balanced rivalry between global integrators and agile regional champions. DHL, FedEx, and GLS deploy deep capital pools to automate hubs, embed AI route planning, and guarantee day-certain international lead times. InPost dominates locker ecosystems through a first-mover advantage and plans to invest PLN 1.8 billion (USD 0.45 billion) in 2025, with 60% ring-fenced for hardware roll-outs.

Regional leaders such as Fan Courier, Sameday, and Poczta Polska differentiate via cultural affinity, granular address databases, and flexible cash-on-delivery options still preferred by segments of the CEE consumer base. Sameday's acquisition of Cargus lifts its Romanian parcel share above 30%, sharpening local competition. Meanwhile, GLS shed its U.S. freight arm to focus on European parcel core, freeing capital for automation at Prague, Budapest, and Zagreb sortation nodes.

Technology shapes the next battleground. Smart-locker patents, blockchain-anchored chain-of-custody modules, and predictive ETA interfaces all raise customer expectations. Companies unable to match innovation cadence risk relegation to subcontractor status. Environmental KPIs also loom: the EU Fit-for-55 roadmap calls for zero-emission urban deliveries by 2030, compelling fleets to invest in e-trucks and depot chargers despite grid limitations. In aggregate, the Central and Eastern Europe courier, express, and parcel (CEP) market prizes scale, tech fluency, and regulatory mastery as the triad for sustained leadership.

Central And Eastern Europe Courier, Express, And Parcel (CEP) Industry Leaders*

- * InPost
- * La Poste Group
- * Poczta Polska SA
- * International Distribution Services (IDS)

* *Disclaimer: Major Players sorted in no particular order
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Component Component 3 Scope Of The Report Bottom

Central And Eastern Europe Courier, Express, And Parcel (CEP) Market Report Scope Domestic, International are covered as segments by Destination. Express, Non-Express are covered as segments by Speed Of Delivery. Business-to-Business (B2B), Business-to-Consumer (B2C), Consumer-to-Consumer (C2C) are covered as segments by

y Model. Heavy Weight Shipments, Light Weight Shipments, Medium Weight Shipments are covered as segments by Shipment Weight. Air, Road, Others are covered as segments by Mode Of Transport. E-Commerce, Financial Services (BFSI), Healthcare, Manufacturing, Primary Industry, Wholesale and Retail Trade (Offline), Others are covered as segments by End User Industry. Albania, Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovak Republic, Slovenia are covered as segments by Country. Destination Domestic | International |

Segmentation Accordion Item

CountryAlbania |
Bulgaria |
Croatia |
Czech Republic |
Estonia |
Hungary |
Latvia |
Lithuania |
Poland |
Romania |
Slovak Republic |
Slovenia |
Rest of CEE |

Frequently Asked Questions

What is the current value of the Central and Eastern Europe courier, express, and parcel (CEP) market?

It is valued at USD 15.71 billion in 2026 with a forecast to reach USD 18.43 billion by 2031.

How fast is the Central and Eastern Europe CEP sector growing?

The market is advancing at a 3.24% CAGR between 2026 and 2031.

Which destination segment is expanding the quickest in CEE parcel logistics?

International services post the highest growth, projected at 3.46% CAGR between 2026-2031.

Which country offers the strongest growth outlook within the region?

Bulgaria leads with an expected 3.72% CAGR over 2026-2031.

How are driver shortages affecting pricing strategies?

Wage inflation tied to a 230,000-driver deficit raises operating costs, accelerating automation and selective surcharges.

What role do parcel lockers play in last-mile efficiency?

Locker networks cut failed deliveries, boost drop density, and help operators manage volume growth without proportional fleet expansion.