



Press release

Bonn, 31 January 2023

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Current market figures published in 2022 Letters Market Report and in 2022 Parcels Market Report

The Bundesnetzagentur has today published its postal market data for 2021 and 2022. The annual market survey in the postal sector provides the basis for the numbers, with the figures for 2022 based on postal operators' estimates.

Letters market

The downward trend in volumes on the letters market resulting from the ongoing digitisation of correspondence continued in 2021. With a volume of 12.20bn mailpieces, there was a 1.38% decrease in the number of letters conveyed compared to last year (2020: 12.37bn items), which was a smaller decrease than in past years.

Letters market revenue (€7.86bn) also continued to decline in 2021, with a decrease of around 2.71% compared to 2020 (around €8.08bn).

The Deutsche Post AG remains market dominant, with a market share of just over 85%. In recent years competitors have increased their share of the market slightly to around 15%. All analyses show a very high level of market concentration in the letters market and point to monopolistic structures. The Bundesnetzagentur will continue to follow developments in this sector closely.

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Parcels market

The parcels market saw continued growth in revenue and volume, still partially due to the Covid-19 pandemic. However, parcel service providers' estimates for 2022 show a slight decrease in parcel volumes (down 1% compared with the previous year) with revenue stable. The decline could be a result of an overall worse economic situation caused by inflation and the interruption of supply chains as well as by the uncertainties brought about by the war in Ukraine.

In 2021 the total number of parcels delivered (domestic and cross-border) increased by nearly 22% to 4.51bn (2020: 3.70bn). Revenue in the parcels market also increased by around 20% from €15.61bn in 2020 to €18.73bn in 2021.

Parcel service providers forecast total revenue of €19.09bn for 2022, which would be an increase of nearly 2%.

In spite of its high market concentrations, the parcels market currently has more competition than the letters market. Deutsche Post DHL remains far ahead of its competitors in terms of market shares. However, since Amazon itself became active as a postal operator, competition has been stimulated significantly, which also goes hand in hand with shifts in shares of the market. Here as well the Bundesnetzagentur will continue to regularly examine the developments of competition structures.

The reports have been published on the Bundesnetzagentur website at www.bundesnetzagentur.de/post-marktberichte.



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The Bundesnetzagentur für Elektrizität, Gas, Telekommunikation, Post und Eisenbahnen is an independent higher federal authority with its main office in Bonn and is under the responsibility of the Federal Ministry for Economic Affairs and Climate Action (BMWK). Some of its areas of activity fall under the substantive supervision of the Federal Ministry for Digital and Transport (BMDV).