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PRESS RELEASE

**The value of the CEP parcel market in Poland   
has exceeded PLN 17 billion,  
 and experts forecast its further double-digit growth**

**The courier, express and postal (CEP) parcel market in Poland has been enjoying continuous, double-digit growth for several years, and its value has already exceeded PLN 17 billion – according to the latest "Polish CEP Report 2022", prepa­red by Last Mile Experts, 7R and Cushman & Wakefield’s advisory agency. Among the factors that most significantly influence the development of the last mile supply segment, experts point to the dynamic growth of the e-commerce sector, which has become one of the key purchasing channels for consumers and deter­mines the increase in demand for this type of services.**

Nearly one in five Poles buys all non-food products in online stores. As a result, total retail sales via e-commerce channels in Poland in 2021 exceeded PLN 100 billion and increased on average by 28.1% per year (CAGR). However, the intensive development of the e-commerce sector carries with it many challenges, among which experts most often mention the efficiency of the supply chain and the need to continue investing in last mile logistics, including courier, express and postal services. According to the "Polish CEP Report 2022", this segment is already valued at over PLN 17 billion, and according to forecasts in 2021-2023 it will maintain double-digit growth dynamics both in terms of volume (14.1%) and value (19.9%).

*The value of online purchases made by Polish consumers is systematically growing. Online retail sales have grown by an average of 28% since 2019 year-on-year. The largest share was recorded in the case of consumer electronics, almost 24%, as well as fashion, which accounts for 15% of all orders. In turn, the fastest-growing segment in 2021 was e-grocery, with an increase of approx. 30% – however, in this case, the market share remains low at only 4%. An equally interesting area of ​​development is buying and selling used items on platforms such as Vinted or OLX,* **emphasizes Mirek Gral, Vice President of Last Mile Experts**, and adds, *Online retailers and carriers need sufficient capacity in their distribution networks to ensure timely and convenient deliveries to consumers. One solution is deliveries outside the home, which are beco­ming more and more popular both at home and abroad.*

**The biggest players on the market**

According to the "Polish CEP 2022" report, InPost is the market leader, both in terms of volume and revenues. In the last year alone the company has grown by nearly 40%, and its key competitive advantage remains the largest network of parcel machines in Europe. The second place in the ranking is taken by DPD, and both companies together account for approx. 64% in terms of volume, and slightly below 50% in terms of revenues on the CEP market.

*The dynamic increase in the popularity of online shopping meant that last year the volume of all parcels in the largest Polish courier network exceeded the magic number of one billion, and according to forecasts, next year it will increase by another 31%. It is true that we are still far from the developed German market, which achieves four times higher results - we are talking about over 4.1 billion parcels in 2021. However, the value of the Polish KEP market at the level of PLN 17 billion makes us take it seriously and carefully follow its development*, **stresses Damian Kołata, Head of Industrial & Logistics Poland, Head of E-commerce CEE at Cushman & Wakefield**.

**Modern logistics facilities remain crucial**

The "Polish CEP 2022" report shows that in the near future – despite the economic crisis and tensions in the international arena – the intensive development of the e-commerce and CEP industries will remain at a high level. The forecasted growth in terms of value and volume also means the need for operators and e-retailers to secure appropriate warehouse and logistics facilities. In this context, facilities that stand out both in terms of technology and understanding of the needs and expectations of future tenants will gain more and more importance.

*The current and expected increases in the CEP industry are constantly driving the development of city logistics. Warehouse spaces located in strategic locations within urban agglomerations (City Flex in the 7R product line) significantly increase the effi-ciency and flexibility of logistics operations at the stage of deliveries, the so-called last mile, constituting a natural complement to peripherally located logistics parks. Currently, facilities dedicated to the e-commerce industry account for nearly 7.5 million sqm of warehouse space in Poland, i.e. over 30% of total supply. Compared to 2019, this is an increase of as much as 84%, which indicates a clear upward trend*, **points out Joanna Ociepka-Wojciechowska, Regional Leasing Director at 7R**, and adds that aspects such as attractive location or easy access to strategic transport infrastructure are just some of the distinguishing features of 7R facilities. *In addition to these, we offer our tenants technologically advanced spaces that effectively support their business and help to constantly improve their operating results, while at the same time caring for the environment*.

**About 7R**

7R SA is a dynamically growing developer operating on the commercial real estate market, specializing in delivering modern warehouse and production space for lease. It develops both warehouse and industrial centres intended for many tenants, as well as BTS facilities. The portfolio of 7R includes large-scale logistics parks, as well as Small Business Unit municipal warehouses, forming the 7R City Flex Last Mile Logistics network. So far, the company has completed projects with a total area of over 1.5 million sqm, while over 4 million sqm is currently under construction in various locations throughout Poland. The developer is involved in ESG activities, caring for the environment, local communities and corporate governance.

**About Cushman & Wakefield**

Cushman & Wakefield (NYSE: CWK) is a leading global real estate advisory firms providing services to tenants and owners of commercial real estate. Cushman & Wakefield is one of the largest real estate advisory firms, employing approximately 50,000 people in 400 offices and 60 countries around the world. In 2021, its revenues amounted to $ 9.4 billion. The most important services provided by the company include property, facility and project management, brokerage in renting space, handling transactions on capital markets, appraisals and more. For more information, visit www.cushmanwakefield.com or follow us on Twitter @CushWake

**About Last Mile Experts**

Last Mile Experts is a highly specialized consulting company focusing all aspects of last mile logistics for courier services (CEP), post and e-commerce. Our goal is to help CEP companies, postal operators, e-commerce merchants, potential investors and other stakeholders improve their performance, operations, organization and technology, as well as develop strategies or mergers and acquisitions. To learn more about the company's activities and download free industry reports, please visit: [https://lastmileexperts.com](https://lastmileexperts.com/).

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