

# THE POST AND PARCEL TRENDS REPORT 2025



# NOTES AND METHODOLOGY



As Stamp Free continues its mission in 2025 to deliver customer-centric, phone-based shipping solutions for postal and carrier organisations worldwide, it's crucial to stay in tune with the real-world challenges these businesses are facing.

To better understand the evolving landscape, Stamp Free partnered once again with the Postal Innovation Platform (PIP) and connect2posts (c2p) to carry out this year's Post and Parcel Trends Research. The primary aim was to uncover the key challenges and strategic priorities shaping the next 3–5 years for posts and carriers across the globe - while also accounting for regional variations in needs and expectations.

With insights gathered from many postal and carrier organisations through surveys, interviews, and workshops one trend stood out above all in 2025 - customer convenience is king.



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The Post and Parcel Trends Report 2025 | This report provides original analysis, information and opinions on industry trends and developments. The Postal Innovation Platform (PIP) is an open platform and forum which focuses on innovative postal and parcel services and studies the future of the postal and parcel industry. c2p is a platform for new technologies and innovation in the postal, parcel, and logistics ecosystem for startups, postal and parcel companies, and other industry partners.

# FOREWORD



**HUGH CRAIGIE  
HALKETT**

CEO & Founder, Stamp Free

The post and parcel industry stands at the forefront of a transformative shift - one that's reshaping how consumers, carriers, and businesses interact with delivery services. At Stamp Free, our mission remains clear: to simplify and digitise postal experiences for everyone, everywhere. Over the past year, we've witnessed a surge in innovation across out-of-home delivery, locker network expansion, and carrier collaboration—all driven by a shared demand for convenience, flexibility, and sustainability.

This year's Post and Parcel Trends Report - completed in conjunction with Bernhard Bukovc of The Postal Innovation Platform and connect2posts - captures the pulse of these developments, spotlighting key areas of focus, emerging technologies, and current issues shaping the future of our industry. One thing is clear - innovation, AI and exciting technological developments are moving our industry along at a breakneck speed with no signs of slowing down.





A close-up photograph of a person's hand holding a stack of shipping materials. The stack includes a yellow padded envelope on top, followed by a brown cardboard box, and another brown cardboard box underneath. The hand is dark-skinned and wears a silver-toned watch on the wrist. The background is blurred, showing an outdoor setting with greenery and a building.

# KEY TAKEAWAYS

## TOP OF THE AGENDA - TOUGHER ECONOMIC ENVIRONMENT & COMPETITION

2025's **top trend** is a tougher economic environment and rising competition, up from #4 in 2024. Posts and parcel operators must seek growth while minimising risks, as market share battles intensify and margins remain stagnant.

## AI - THE NUMBER ONE TECHNOLOGICAL TREND FOR 2025

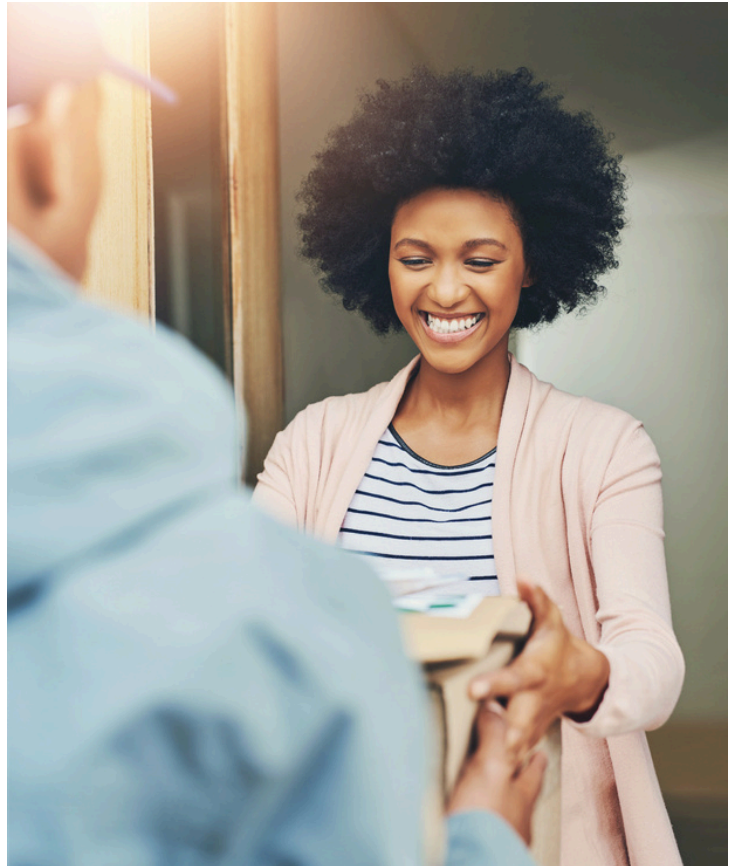
AI is the most important technological trend for 2025, reflecting its growing role in logistics. While 2024 focused on testing, experimenting, and adding generative AI to existing services, 2025 will shift toward more strategic applications. For the postal and parcel industry, this means moving beyond pilots to fully scaling AI across operations. Companies must integrate AI agents, automate processes, and invest in workforce reskilling to stay competitive in an evolving market.



# KEY TAKEAWAYS CONT..

## THE BIGGEST CHALLENGE IS IMPLEMENTING NEW TECH

**The number one challenge in 2025** is the adoption and implementation of new technologies, closely followed by competition and market share. Enormous changes are happening in the industry landscape with powerful new technologies replacing legacy systems. However, new developments in AI, such as agentic AI, increase the pressure to deploy and use those technologies. Postal and CEP companies are struggling to keep up with the developments, and the re-skilling of the workforce is just one element of the overall challenge.



## IN WHAT AREAS ARE COMPANIES LOOKING TO INVEST IN FOR 2025?

Fierce competition and market pressure have shifted the focus of postal and parcel companies towards customer satisfaction and first and last mile solutions, as these will play a crucial role in keeping or gaining new customers. The number one priority in which postal and parcel companies intend to invest most resources in the next 1-2 years are therefore customer satisfaction & convenience in first place followed by first & last mile infrastructure and solutions.

# 74%

of respondents say AI will have the biggest impact on the Post and Parcel industry in the next 3 to 5 years.

# 68%

of postal and parcel companies intend to invest most resources in the next 1-2 years in to customer satisfaction & convenience.



# KEY TAKEAWAYS CONT..

In 2025, **convenience and an exceptional post-purchase experience** are the most important factors to the modern consumer. Industry executives have made ensuring this a priority with customer satisfaction and convenience again their number one priority. It's clear the fight for market share in a super-competitive parcel market will be decided by who offers the best customer service.

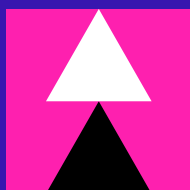
## FURTHER PRIORITIES

\* OOH and first & last mile solutions are still one of the key trends of the postal and parcel markets today, and there are no signs this is slowing down. In this year's report, first & last mile infrastructures and solutions rank in second place as a priority, right after customer experience and satisfaction. Last mile infrastructures are an integral part of customer experience with a close synergy there.

\* Last year sustainability was among the top three industry priorities - while still a key topic, it now has gone down to fifth in the rankings. The reasons for the lower priority for sustainability are to be found in the changing market environment as well as in projects that have been implemented since (e.g., fleet transformation). In some areas, such as circularity and re-usable packaging, it has not been possible so far to develop successful business cases with a broad market adoption.

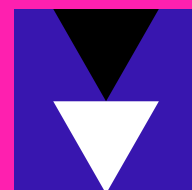
**69%**

of posts & carriers see  
first and last-mile as  
high priority



**51%**

of posts & carriers see  
sustainability as high  
priority



# KEY TAKEAWAYS CONT..



## ROBOTIC SOLUTIONS

AI, machine learning and IoT are being integrated into logistics operations and can boost the deployment of robotics solutions. One of the main arguments for deploying robotics solutions is the increasing challenge of finding human workers. Among the biggest challenges for posts and carriers, the workforce challenge rises to number three in our survey. Robotics trends in logistics are expected to have a significant impact on the industry - including Autonomous Vehicles for delivery or the middle mile. An example of these is self-driving trucks that will revolutionize logistics processes and last-mile delivery.

**9%**

view robotic solutions as a low priority for the next 3 to 5 years

**51%**

view robotic solutions as a high priority

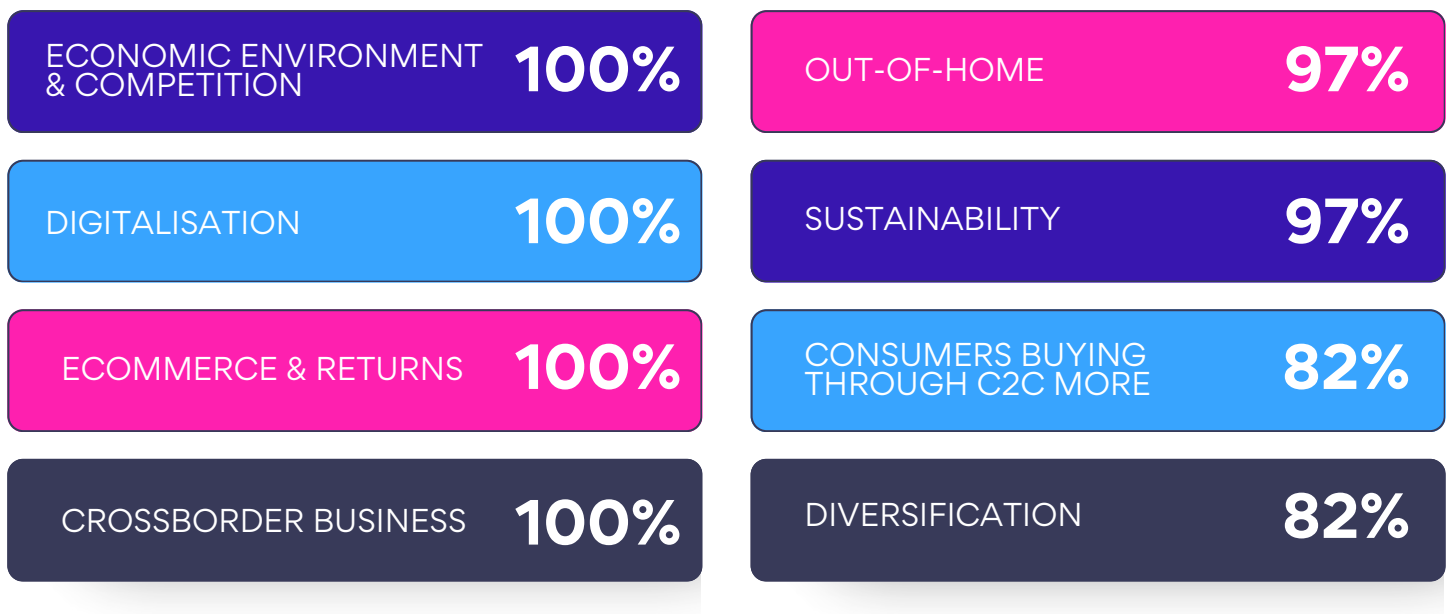
## INTO THE DATA..

With the key takeaways from the research now covered off, we can now take a look at each of the areas in more detail. Starting with the biggest trends amongst posts and carriers!



# TRENDS FOR 2025

## RESPONSES - % OF POSTS/CARRIERS THAT THINK THE FOLLOWING KEY TRENDS WILL IMPACT ON THE POST AND PARCEL MARKET IN THE NEXT 3-5 YEARS



\* In last year's trend report, digitalisation, e-commerce and returns and sustainability were identified as the main three industry trends. The outlook has shifted slightly this time around. Digitalisation remains a key trend, ranking at second place, followed by e-commerce and returns at third place.

\* The newcomer to the top spot in 2025's iteration of research is the recognition of the tougher economic environment and competition - this ranked in fourth place last year.

\* Sustainability, the number three trend in 2024, is only in place six in 2025, ranking also behind cross-border business (place 4) and Out-Of-Home (OOH – place 5).



# TECHNOLOGY TRENDS FOR 2025

In last year's iteration of the Post and Parcel Trends Report 'Big Data' was named the technology which will have the biggest impact on the postal and parcel industry in the coming 3 to 5 years. Alongside this key indicator the following places were taken by Automation (2), Artificial Intelligence (3), and Cybersecurity (4).



The enormous role which AI plays in today's solutions is reflected in the findings of our report in which AI rockets into first place - much like it's rocketed into public discourse in the last year.

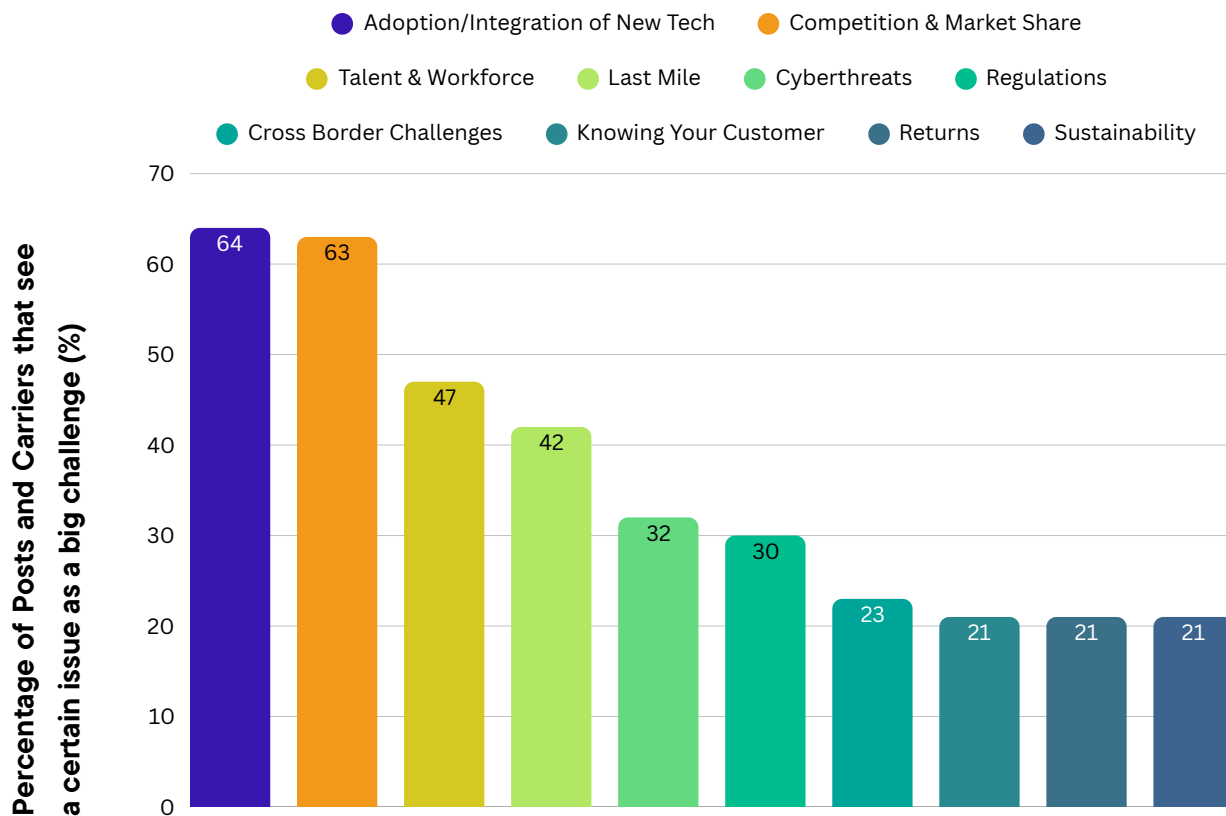
Cybersecurity takes a huge leap into second place with Automation relegated to the third position just ahead of robotics solutions (4). Big Data, the number one technology in 2024 plummets down to number 5 indicating a real shift in priority.



This doesn't mean that the importance of data has gone down. Quite the contrary, data is the most important building block of AI and the fact that cybersecurity is ranking on place 2 also underlines the importance of data and of securing it against risks and attacks.

# CHALLENGES FACED FOR 2025

## RESPONSES - HOW BIG A CHALLENGE ARE CERTAIN ISSUES IN THE POST AND PARCEL INDUSTRY IN 2025?



Regarding the main challenges which the industry feel that they're facing, not much has changed. In 2024, the main challenges were competition and market shares on place one, followed by adoption and integration of new technologies (2), cyberthreats and resilience measures (3), and talent and workforce related issues (4).

The number one challenge in 2025 is the adoption and implementation of new technologies, closely followed by competition and market shares. Talent and workforce related issues are now ranking on place 3 and on place 4 are last mile related challenges such as delivery processes, PUDOs etc. Cybersecurity is not considered as such a big challenge as it was in 2024, mainly due to the industry's adoption and implementation of relevant solutions.

# 94%

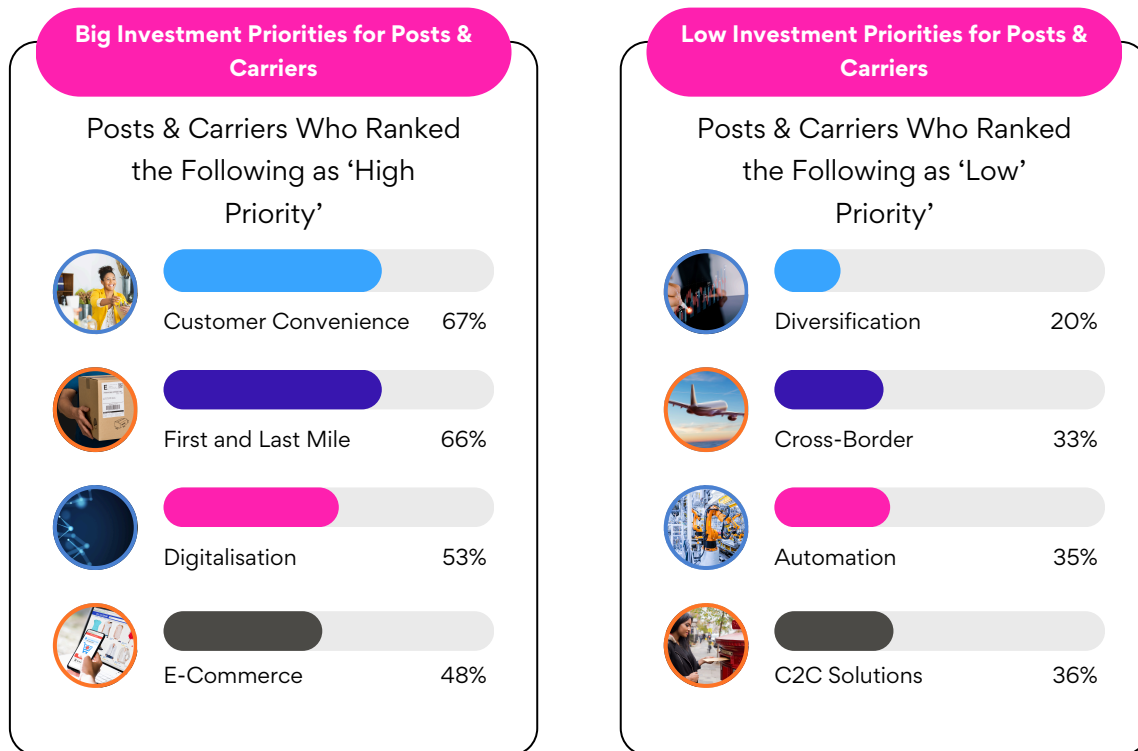
believe cybersecurity is an increasing challenge facing the post and parcel industry in 2025

# 21%

view sustainability as a key challenge facing the post and parcel industry in 2025

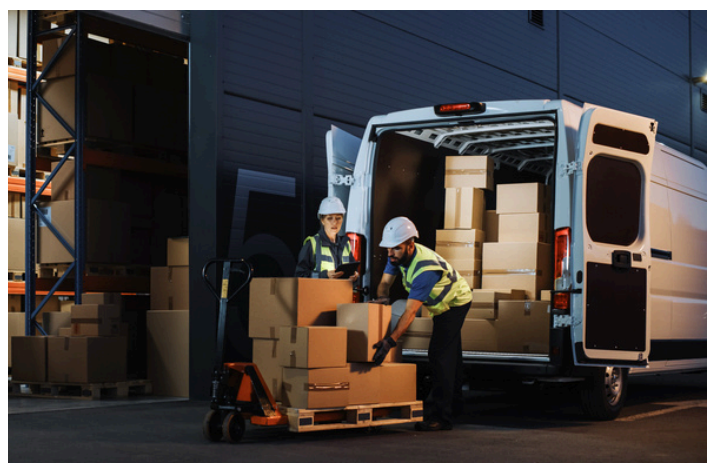


# WHAT'S AN INVESTMENT PRIORITY IN 2025?



## RESPONSES - % OF POSTS/CARRIERS' INVESTMENT PRIORITIES FOR 2025 RANKED BY PRIORITY

In 2024's Trend Report, e-commerce solutions (fulfilment, marketplaces, returns etc.) were ranked as the number one priority, followed by first and last mile infrastructure (PUDOs, lockers etc.) at (2), sustainability (fleet transformation, circular economy, decarbonisation, alternative fuels, packaging etc.) at (3), and digitalisation, including AI innovation and technologies at (4).



2025 brings a new priority to the head of the table - customer satisfaction and experience. Fierce competition and market pressure have shifted the focus of postal and parcel companies towards customer satisfaction and first and last mile solutions, as these will play a crucial role in keeping or gaining new customers. The second-placed area where post and parcel companies look set to invest is on first & last mile infrastructure and solutions. Digitalisation (3) and e-commerce solutions (4) follow closely behind. Sustainability has again fallen down the list and ranks at (5).



# ECONOMIC ENVIRONMENT AND COMPETITION

Competition in the parcel industry is strong. Large volume senders can easily move their volumes from one logistics partner to another. In addition, they can build their own infrastructure and enter the delivery business, which is what they often do, thus being able to control the parcel journey from shipping to delivery. With an increasing number of OOH solutions, developing delivery services has become relatively easy, as delivery drivers would not be obliged to deliver parcels to the recipients at home. Market entry is not a huge obstacle anymore.

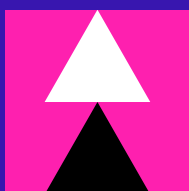
## FACTORS AFFECTING ECONOMIC ENVIRONMENT

\* In addition, there's a strong concentration of parcel volumes delivered by postal and parcel companies coming from only a handful of international marketplaces. As an example, La Poste announced towards the end of 2024 that **22% of its total volumes come from the Chinese marketplaces Temu and Shein, 21% from Amazon**. Therefore, 43% of the volumes come from marketplaces that could relatively easily change their delivery partners. Competition is fierce with all market providers feeling the pressure.

\* The global economy is under pressure, due to wars, conflicts and higher levels of inflation. The tougher economic environment is felt across the globe according to the 2025 Global Risks Report of the World Economic Forum (WEF) ([Global Risks Report 2025](#) | [World Economic Forum](#)). According to the WEF research, 52% of the respondents of their survey anticipate an unsettled global outlook over the next two years.

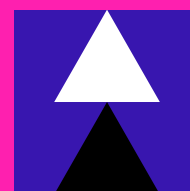
**55%**

of posts & carriers have increased their e-commerce market share in the last year



**60%**

of posts & carriers think they can increase their C2C market share in the coming 1-2 years

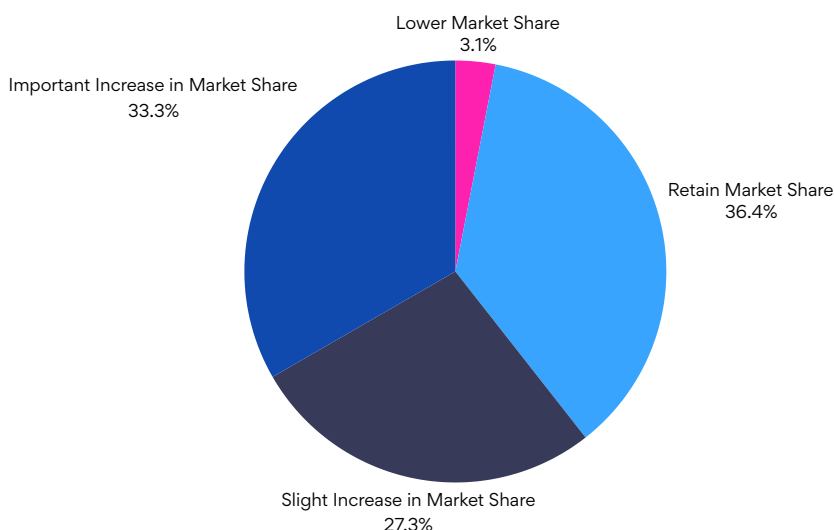


# ECONOMIC ENVIRONMENT AND COMPETITION CONT..

The survey findings are supported by interviews which we carried out with various industry experts. The tough economic and highly competitive industry environment requires the postal and parcel operators to look for growth opportunities while balancing the potential risks of doing so. The fight for market share is getting tougher and the margins are not increasing. Despite this difficult and competitive environment, most industry players have a very positive outlook for their e-commerce business in 2025. As you can see below, around 60% of respondents believe they'll increase their market share in 2025.



## RESPONSES - DO YOU THINK YOU WILL INCREASE YOUR E-COMMERCE MARKET SHARE IN THE NEXT 12 MONTHS?



These developments and the associated risks contribute to a challenging and extremely competitive market in 2025 - where such competition is involved however hopefully we will see exciting new developments and innovation rise to the forefront in post and parcel.



# ACCENTURE RESEARCH IN INDUSTRY



3.3% ▼

decline in the total revenue of  
postal agents

We gained access to Accenture's Postal Industry Research - with it being useful to compare and contrast against our own research we have provided a brief summary below.

## ACCENTURE'S POSTAL RESEARCH SUMMARY

Intense competition, economic headwinds and increased volume cyclicality, along with ever-evolving customer expectations, require posts to adapt and maximise efficiency. Accenture's new **Postal Industry research** shows that broader CEP revenues have flatlined, driven by a shrinking revenue pool as retailers increasingly insource their volumes. Total revenue of postal agents taken together declined by 3.3% and integrators by 1.7% driven by lower volumes and diminished pricing power - differentiation is becoming key to growth in the market.

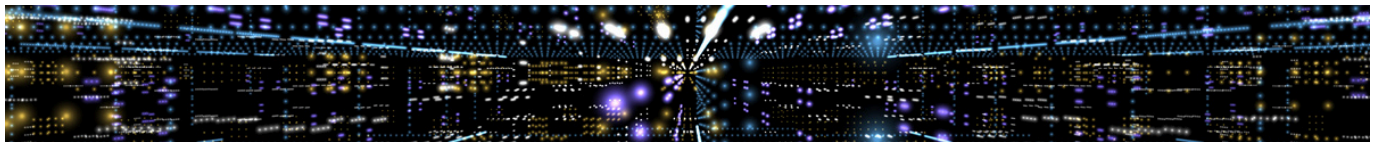


1.7% ▼

decline in the total revenue of  
integrators

Furthermore, Accenture's report suggests that the industry will need to transform at an accelerated pace marked by key themes – consolidation and a new focus on specialization and highly tailored offerings. Scale will matter and improve longer term profitability prospects. Cross border will feature prominently here. Specialization in services and offerings will help posts and CEP players break the 'race to the bottom' cycle and help postal players take back some pricing power.

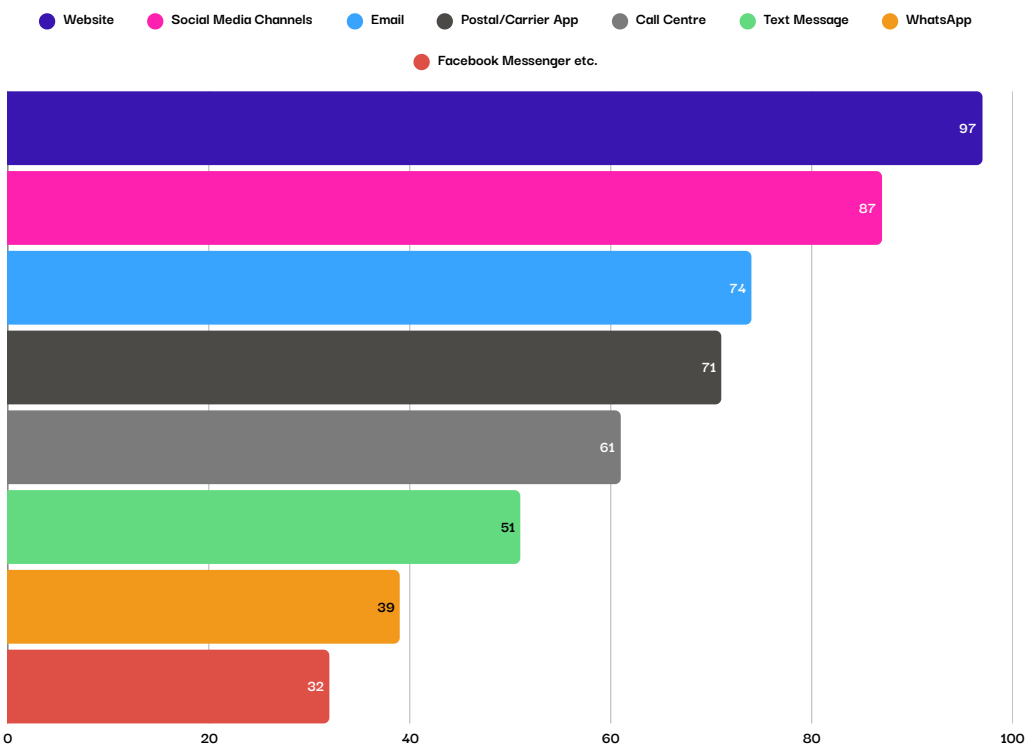
Postal players are increasingly focusing on volume growth and working with regulators to have service standards, level commitments, eased. This worked post-Covid after capacity investments but with dramatic acceleration again in mail volume declines it is incumbent on posts to focus more on profits and margin instead of just volume. We're seeing this focus on margin-accretive volumes from the global integrator players.



# DIGITALISATION IN THE POSTAL INDUSTRY

Digitalisation continues to be one of the top trends in 2025 as it was last year. With a constantly evolving landscape of innovation, points of differentiation and new ways to reach your customer it's clear this a process to be engaged with and involve yourself in - and not allow it to pass you by.

## RESPONSES - WHAT CHANNELS ARE POSTS AND CARRIERS USING TO COMMUNICATE WITH CUSTOMERS?

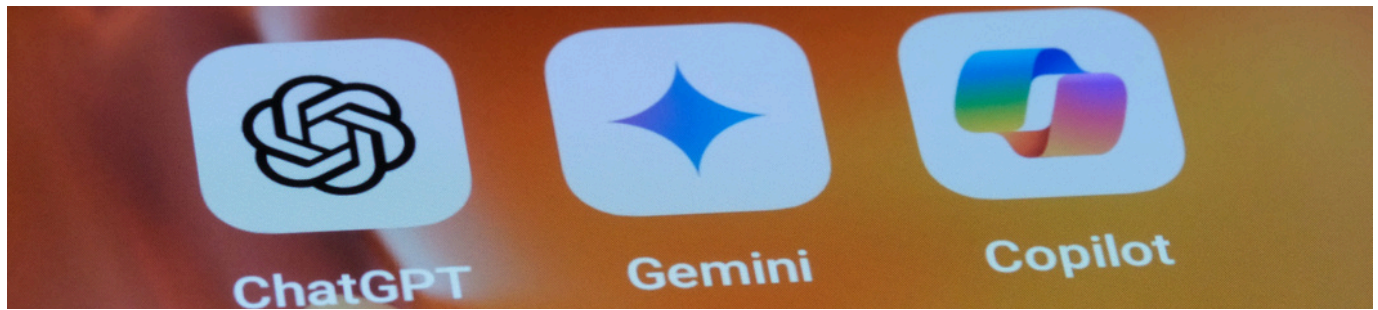


Only 39% of survey respondents use WhatsApp to communicate with their customers - with 51% using regular text messages and 33% using Facebook Messenger, Google Messenger, iMessage etc. With WhatsApp having 3bn+ users worldwide it's a largely untapped resource that Stamp Free are tapping into with our AppFree solution!

Almost 70% of respondents use a postal/carrier app to communicate with their customers - spare them the download, free up storage space on their phone and use AppFree.

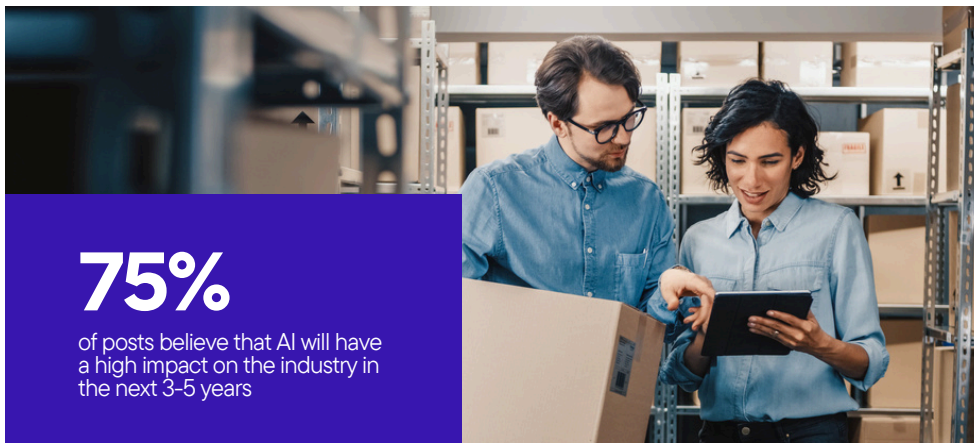
\* Digitalisation as a trend goes hand in hand with both data and AI. Postal and parcel companies have an abundance of data, but generating and extracting the right data, cleansing it, analysing it, and bringing it to the right use cases is a challenge. Key obstacles include reskilling of the workforce, legacy systems in combination with technical debt and the adoption and implementation of new technologies in general.





# AI USAGE IN THE POSTAL INDUSTRY |

The results of our research reveal that AI is the technology which will play the biggest role for the post and parcel industry in 2025 - supported and reinforced by interviews with innovation and thought leaders of the industry.

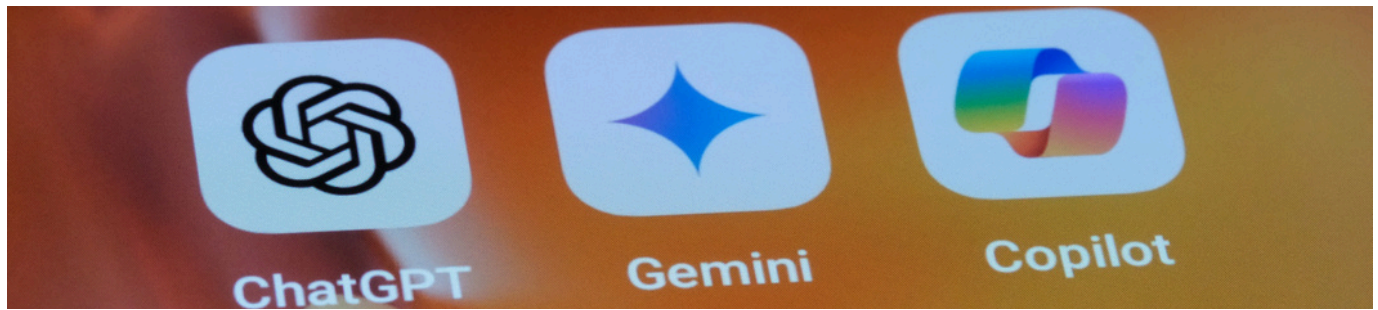


Artificial Intelligence (AI) and information processing technologies are expected to have the biggest impact on businesses over the coming 5 years, according to the World Economic Forum, with **86% of respondents to the WEF survey supporting this outlook**. AI and data driven transformation is expected to reshape the global labour market with both jobs and required skills being adapted and transformed in this process.

At the end of 2024, IBM Institute for Business Value (IBM IBV), in partnership with Oxford Economics, published a survey in which it asked global businesses challenges they must overcome to succeed in an AI-fuelled competitive landscape and how they're preparing their people to drive change. While in 2024 many businesses were still testing and experimenting with AI, we will now see a huge shift towards implementation and using AI solutions to optimize existing processes.

One main challenge is the workforce, which, according to the IBM report, needs profound re-skilling. Global CEOs estimated that, in average, **35% of the workforce needs to be reskilled due to the advances in AI technology**. Another challenge is the technical debt which continues to increase. This technical debt refers to the long-term costs and inefficiencies caused by quick, suboptimal technical decisions made to expedite development or delivery. As a result, 55% of executives interviewed by IBM now say **technical debt is either a major obstacle or a real roadblock to achieving business goals**. Therefore, organizations must build solutions within a modern architecture if they want to deliver.





# AI USAGE IN THE POSTAL INDUSTRY CONT..

For the post and parcel industry this is crucial. Legacy systems can be a considerable obstacle to implementing new technologies. Therefore, it doesn't come as a surprise that our survey shows that the biggest challenge for the post and parcel industry in 2025 is the adoption and implementation of new technologies. The IBM report states that 30% of executives say that today their organisations are primarily experimenting with AI, testing its use in low-risk, non-core functions to gain experience, build confidence, and identify potential pain points. Only 24% would say they're innovating with AI to advance new opportunities and create new business models. For 2025 most executives see advancements in scaling AI solutions.

“““

In the fast-moving world of post and parcel, AI isn't just an advantage – it's the key to survival. By harnessing AI's power to activities like route optimization, demand forecasting, automation, sorting, the customer journey, and so much more, operators can deliver unprecedented efficiency, accuracy and customer satisfaction in an era where speed, precision and the ability to transform and pivot will define winners.

**CHARLES BREWER, CEO OF POS MALAYSIA**

Agentic AI, which is developing quickly, puts additional pressure on companies and the logistics sector. Agentic AI is the new leap of AI in which AI will proactively and autonomously act to reach certain objectives without constant human guidance. Existing simple AI assistants are thus replaced by AI agents with much higher capabilities. This means for the workforce that they should be able to manage entire teams of AI agents that are working on various tasks autonomously. Across industries, IBM's report found that 47% of executives think that their staff currently lacks knowledge and skills in this AI driven environment. According to the Gartner 2025 Trend Report, Agentic AI is the number one technology trend this year.

While 2024 has still been a year of testing and experimenting as well as the use of AI by adding generative functionalities to existing services, 2025 will probably show the development of more strategic use cases in the logistics industry. For the post and parcel industry the time of testing and experimenting with AI technologies should now be replaced by scaling AI throughout the organizations, in hand with the deployment of AI agents and the reskilling of the workforce.

# ECOMMERCE AND RETURNS IN INDUSTRY



**94%** ▲

of posts see investing in returns as a reasonable priority for the next 1-2 years

## PRIORITIES - IS ECOMMERCE AND RETURNS STILL IMPORTANT?

E-commerce and returns ranked as a top priority when we asked about the areas in which postal and parcel companies intend to invest most resources in the next 1-2 years. There has been a shift in this years iteration in which e-commerce and returns now rank fourth - after customer satisfaction & convenience (1), first & last mile infrastructure and solutions (2), and digitalisation (3). E-Commerce and Returns are clearly still a priority however with it being a third-ranked trend in this year's survey behind tougher economic environment and digitalisation - with the note that all three of these areas link into and intersperse with each other.

**9.9%** ▼

the percentage of posts that have reported a decrease in their e-commerce market share this year



E-commerce remains the main driver of growth in the post and parcel industry. The e-commerce market is constantly changing with new market entrants, changing consumer demands, and technology playing a major role in the market development.

This is reflected in e-commerce growth statistics. Worldwide e-commerce sales for B2B businesses have been steadily rising year over year for the last decade, with the global B2B e-commerce market valued at USD\$36 trillion by 2026. Global B2C e-commerce revenue is expected to grow to USD \$5.5 trillion by 2027 at a steady 14.4% compound annual growth rate. Leading segments for B2C e-commerce in order are consumer electronics, fashion, furniture, toys/hobby, biohealth pharmaceuticals, media & entertainment, beverages, and food.



# ECOMMERCE AND RETURNS CONT..

A recently published FedEx report also analysed the key e-commerce trends for 2025 - according to the report, convenience and an exceptional post-purchase experience are what matter most to customers in 2025.

Convenience will thus dominate from payments to shipping to communication, and personalisation. All touch points with consumers must have options. In addition, consumers expect reliable delivery, proactive updates, proof of delivery, and frictionless returns and resolutions.

97% of consumers have abandoned a purchase due to inadequate convenience. This means that fast, easy, and convenient offerings will support a positive buying decision. Once the order is placed, 91% of consumers want proactive and accurate order communication. According to the report, 73% of respondents value easy and convenient return options as one of the most important aspects to consider when buying from a brand or retailer.



These findings are fully supported by our own research. Industry executives ranked customer satisfaction and convenience as their number one priority for 2025.

The fight for market shares in a highly competitive parcel market (note that the tougher economic environment and competition are considered as the number one trend this year) will be decided by who will offer the best consumer service.

New technologies, in particular AI based solutions, will play a crucial role. AI will help to propel the e-commerce offerings by enhancing content marketing, hyper-personalisation for consumers, real-time traceability and visibility, and operational efficiency.



# ECOMMERCE AND RETURNS CONT..

18% ▼

of posts use social media channels to facilitate returns for their customers



Other e-commerce trends reflect the different consumer preferences that are about to re-shape considerable parts of the e-commerce markets.

Fast delivery, in particular same-day-delivery options are on a rise. According to Business Research Insights the global same day delivery market size was USD 7.35 billion in 2023 and the market is projected to touch USD 21.48 billion by 2032 at CAGR 12.65% during the forecast period.

On the other hand, slower delivery options are becoming largely accepted as a trade-off for cheaper goods. Chinese retailers Temu and Shein are re-defining the e-commerce markets with unbeatable low-cost products (fast fashion). With these low price options consumers are willing to accept longer delivery times.

These trends have a considerable impact on the post and parcel business, as companies are coping with vast volumes of low value items. Traditional international postal channels are not able to provide competitive prices anymore. And on the delivery side, large volumes of low value items come with very low margins and the permanent risk of losing those volumes to competitors.

“““

To thrive in this dynamic ecommerce landscape, the postal industry has to embrace accelerated transformation. This necessitates strategic consolidation for improved profitability, a sharp focus on specialized and tailored services to achieve pricing power, and a fundamental recalibration from volume-centric strategies to those prioritizing margin.

**MARK BRIGANTI, POST AND PARCEL  
INDUSTRY PRINCIPAL DIRECTOR, ACCENTURE**





# HOW ARE POSTS FACILITATING RETURNS?

## WEBSITE

78.57%

## OWN APP

78.57%

## CALL CENTRE

32.14%

## TEXT MESSAGE

21.43%

## SOCIAL MEDIA CHANNELS

17.86%

## DON'T KNOW

10.71%

### RESPONSES TO QUESTION: HOW ARE YOU FACILITATING YOUR RETURNS FOR CUSTOMERS?

Predictably, website and own-app options are the most universally used - however, with consumers growing sick of app downloads and not using platforms that best suit them there's room for other options to grow and take precedence.

# CYBERSECURITY - A GROWING CONCERN?



**95%** ▲

of posts see cyberthreats and implementing resilience measures as at least a moderate challenge in the coming years

## ARE POSTS STILL CONCERNED ABOUT CYBER ATTACKS?

Last year's Trend Report noted the rise of cyber related threads, based on the findings of the World Economic Forum's (WEF) annual Global Risk Report, presenting and analysing developments of the various risks the world is confronted with. In the WEF 2024 report, cyber insecurity was listed in fourth place, even before interstate armed conflicts, economic downturn, or pollution. This year's research places it in fifth with cyber threats focusing on cyber espionage and warfare - clearly it's still an area of concern and priority for posts as cyber-attacks become better-masked and more sophisticated.



**58%** 

the percentage of posts that see cyber attacks and resilience measures as impacting the postal industry highly over the next 1-2 years

It's clear that posts believe that cybersecurity (and the impending issue of protecting against them) is going to be a key shaping aspect of challenges over the next 2 years. The technology behind implementing protections is ranked number 2 of the biggest challenges - just behind the aforementioned AI.

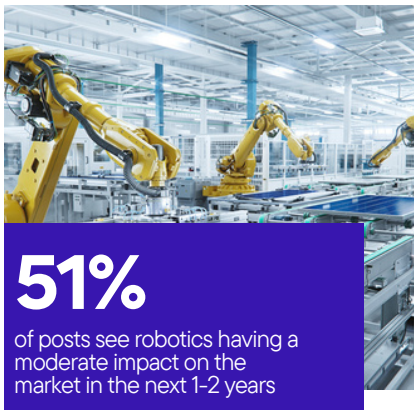
This underlines the industry's acknowledgement that cyberthreats are a considerable risk going hand in hand with digitalization, growing amounts of data, and solutions based on Artificial Intelligence. Today, every step in logistics processes relies heavily on data and digital tools. Shipping, tracking, cross-border related actions, collaboration with logistics partners along the supply chain and delivery. That's before elements such as post-purchase activities or returns in the e-commerce business are even brought into the equation.

For 2025 we can continue to expect considerable investments and the implementation of respective solutions in this field. The need for robust cybersecurity protection has never been more relevant.



# AUTOMATION AND ROBOTICS

In 2025, several robotics trends in logistics are expected to have a significant impact on the post and parcel industry. These include **autonomous vehicles** for delivery or the middle mile, such as self-driving trucks that will revolutionise logistics processes and last-mile delivery. Another area of prominence is advanced robotic warehouse systems. Robots can handle a multitude of tasks, such as picking, packing, and inventory management - with the addition of collaborative robots (cobots) that work alongside humans. Cobots are enhancing productivity and addressing labour shortages - with the latter point becoming increasingly important.



Investments in and deployment of robots, in particular mobile robots is advancing at unprecedented speed. According to Straits Research, the global mobile robots market size was valued at USD 24.41 billion in 2024 and is projected to reach from USD 29.86 billion in 2025 to USD 149.7 billion by 2033. Furthermore, International Federation of Robotics (IFR) recently published its report on the top trends for the robotics industry for 2025.

According to their findings, one of the key drivers is the shortage of labour. Robots can perform tedious tasks such as heavy lifting, highly repetitive tasks, and visual quality inspection. By automating dull, dangerous or delicate tasks, human workers can focus on higher-value tasks. Therefore, robots can help to fill gaps when and where needed. The other main trends are in technology, with AI enabling huge strides in robotics use cases. According to IFR, robot and chip manufacturers are investing in the development of dedicated hardware and software that simulate real-world environments. This so-called Physical AI allows robots to train themselves in virtual environments and operate by experience, rather than programming.





# AUTOMATION AND ROBOTICS CONT..

Robots in the shape of human bodies ('known as Humanoids') can become general-purpose tools that can take over many different tasks, from loading and unloading to work at sorting equipment. However, IFR stresses that it remains to be seen whether humanoid robots can represent an economically viable and scalable business case for industrial applications, especially when compared to existing solutions.

Speed is king, and if a human worker is still faster than a humanoid, then the argument for a robotics solution is still weak. However, during our interviews, some industry experts mentioned that they wouldn't have thought that humanoids would become a topic within the logistics industry any time soon, but due to the rapid developments it has become part of their agenda now.

“

In a foreseeable future the logistic industry will be challenged in securing workforce both in sorting operation and distribution. Currently few trajectories are pointing towards facing these issues, outsourcing the blue-collar HR-strategy, micro learning of workforce and especially automation and robotics. AI and data integrations are already transforming the efficiency and business viability of robotic deployments beyond purely mechanical capabilities in other industries, and major logistic players has already started several of these initiatives long ago.

**CHRISTIAN OESTERGAARD**  
**LEAD VISIONARY - SENIOR GROUP STRATEGIST OF IT**  
**PRODUCTION/IOT/AI - POSTNORD**

One of the main arguments for deploying robotics solutions is the increasing challenge of finding human workers. The workforce challenge ranks number three among the biggest challenges in 2025 - however, when it comes to investment priorities, automation and robotics currently only rank seventh. This seems to indicate that currently the focus is still on research and testing rather than deployment.

**86%**

of posts believe that hiring talent and maintaining an efficient workforce is going to be a challenge for them in 2025

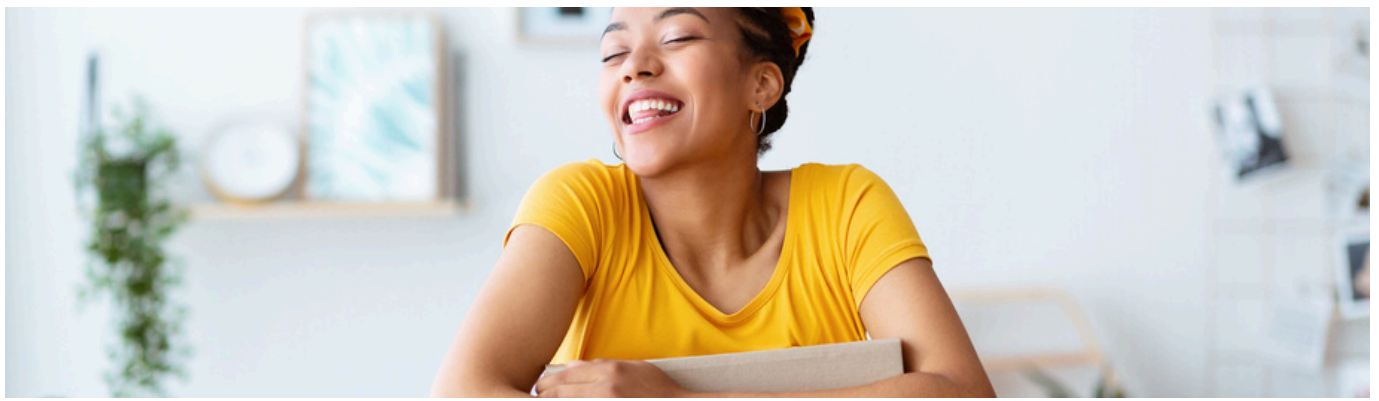


**35%**

of posts see investing in automation and robotics as a high priority in 2025

One issue with robotics solutions is still speed. As long as workforce is available and faster than robots, the business case for robotics solutions is more difficult. However, while from a physical perspective robots already operate at a high level and increases on a purely mechanical level are challenging, AI and data driven enhancements will increase the efficient use and provide more interesting business cases.





# CUSTOMER SATISFACTION AND CONVENIENCE

As discussed this has been established as the main priority – and a new one at that – for posts in 2025. With customer expectations higher than ever and a race to provide the best service in full swing it's clear that herein lies the key to establishing and consolidating market share in the postal industry.



Customer experience has become a key differentiator in a highly competitive environment. Postal and CEP companies that succeed in offering a great consumer experience with delivery options, hyper-personalisation, and the right communication tools will have a competitive edge. Postal and CEP companies have realized that they must meet their customers where they are or where they want the service to be delivered, with the service being tailored to their specific needs.

New technologies including data sourcing and AI play a pivotal role. They allow action taken on real-time data, provide deeper insights into customer preferences, and are the key to tailoring the service to the customers' needs. Based on advancements in technology, communication tools and strategies have evolved, providing today an omnichannel experience, thus making it seamless and easy for customers to exchange with carriers and other parties.

““““

The challenges for 2025 are numerous: economic uncertainty, inflation, cost pressure and sorting capacity imbalances are putting the sector to the test. It is therefore essential that logistics players focus on key differentiating factors and innovative offers that meet the new market and customer needs.

**THIERRY GOLLIARD**  
**DIRECTOR/VP OPEN INNOVATION AND VENTURING, SWISS POST**

# FIRST AND LAST MILE INFRASTRUCTURE



## STILL A PRIORITY FOR POSTS?

Last year's report placed investments in the first and last mile, such as PUDOs, lockers or new delivery models in second place as a priority for posts right after e-commerce solutions. This underlined the ongoing trend of creating a strong OOH network and the development of new solutions and services for the first and last mile, including optimisation models, locker and PUDO networks as well as fleet transformation.

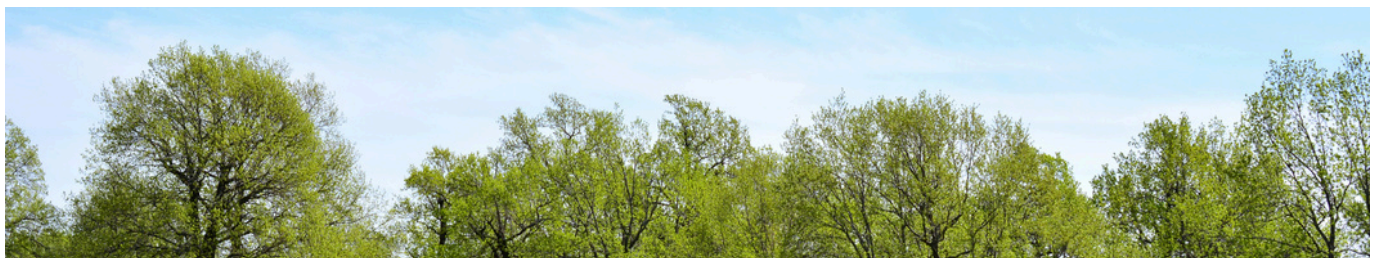
In this year's report, first and last mile infrastructures and solutions still rank in a strong second place, right after customer experience and satisfaction. In fact, last mile infrastructures are an integral part of customer experience, hence there is a close relationship between both priorities.



The out-of-home (OOH) locker market is experiencing significant growth across Europe. InPost plans to invest an additional £600 million by 2029 to expand its locker network in the UK. DHL is set to add 2,000 lockers in Germany by the end of 2025, aiming to double its total number to 34,000 by 2030. KEBA has secured contracts with bpost for a major locker rollout in Belgium and with GLS for deployments in Italy, Spain, and Portugal. Meanwhile, Bloq.it and DeinFach have announced the installation of 1,000 carrier-agnostic lockers across Germany by the end of 2025.

In addition to rapid network expansion and technological advancements, the out-of-home (OOH) delivery market is increasingly embracing collaborative models. Vinted Go is pursuing a strategy to build Europe's leading open network, with companies like UPS already utilising its infrastructure in France and more partners expected to join. OOH and first- and last-mile delivery solutions continue to be major trends shaping the postal and parcel sectors, with no signs of slowing down. A recent McKinsey report supports this view, highlighting that the evolution of OOH delivery is ongoing and poised for further innovation in the coming years.





# SUSTAINABILITY IN THE POSTAL INDUSTRY I

Sustainability efforts have been moving into the centre of post and parcel companies' strategies over the recent years. Striving for Net-Zero, transforming the fleet to EVs, using alternative fuels, or deploying re-usable packaging are only some of the many areas in which postal and parcel companies are implementing their sustainability agenda.

Last year's research indicated that sustainability was among the top three priorities of the industry. Moving to position five on this year's list it's clear that other issues have taken precedence. But why?

One is that projects such as fleet transformation have already been implemented - or implementation is already ongoing. While questions remain over the right solutions for linehaul operations strategies have been defined, investments made and projects executed.

In other areas, the situation is different, for example when it comes to re-usable packaging. We have seen a lot of testing and experimenting with various products as well as business models. However, there hasn't been any big breakthrough so far, even though several postal and parcel companies have deployed solutions. Without a real market uptake, the impact and value remain very limited. The circularity approaches that could trigger a wide market acceptance are not solved or clear today.

**54%** ▲

of posts see sustainability commitments as an important part of their strategy but balanced with cost-cutting and growth objectives

**37%** ▲

see sustainability commitments as a major part of their strategy and is a top priority

**9%** ▼

of posts considered sustainability a top priority

# IN CONCLUSION - 2025'S KEY ISSUES AND PRIORITIES



This year's research highlights an industry at a pivotal point, shaped by a tougher economic climate and mounting competitive pressure. With margins under strain and the fight for market share intensifying, post and parcel operators must strike a delicate balance between seeking growth and managing risk. In this environment, customer satisfaction and first and last mile solutions have become top strategic priorities—key battlegrounds in the race to attract and retain business.

Artificial Intelligence has clearly moved from the margins to the mainstream. What was once a period of testing and small-scale trials is now giving way to full-scale deployment. AI is no longer just a tool—it's becoming a core part of operational strategy, driving efficiency, improving service, and reshaping customer experiences. At the same time, the pace of change in technology is creating real challenges, particularly around implementation and the need to reskill the workforce.



While sustainability has dropped down the priority list compared to last year, it remains a relevant theme. The shift reflects the current economic realities and the fact that many organisations have already acted on their key sustainability initiatives—such as fleet upgrades. Nonetheless, gaps remain, especially in areas like circularity and reusable packaging where scalable solutions have yet to take hold.

In summary, the outlook for 2025 is defined by rapid transformation, where success hinges on how effectively organisations can adapt. Those that invest in technology, put customers at the centre, and build resilient, agile operations will be best placed to compete—and grow—in a challenging but opportunity-rich market.



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