2020 State of Holiday Shipping in the U.S.

COVID-19 EDITION

An unbiased trend analysis and forecast report for UPS and FedEx from an on-time delivery performance standpoint in retail parcel shipping.

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About This Report

The "2020 State of Holiday Shipping in the U.S. — Covid-19 Edition" focuses on understanding the impact of the Covid-19 pandemic on the on-time delivery performance of UPS and FedEx in the United States.

DATA REPORTING AND ANALYSIS

In order to extract meaningful insights which can be used to better understand and forecast the on-time delivery performance of UPS and FedEx during the upcoming 2020 Holiday season, we analyzed shipment data during the following periods:

2019 Holiday Period
(Nov 22 – Dec 31, 2019)

Pre-Pandemic Period
(Jan 1 – Mar 31, 2020)

Pandemic Period
(Apr 1 – Oct 31, 2020)

This report emerges from a trend analysis done on statistically relevant and verifiable shipment data collected from millions of e-commerce packages tracked and monitored by LateShipment.com during the above mentioned period.

WHO CAN USE THIS REPORT

This report is an attempt to bring more transparency to the workings of the autonomous small parcel shipping industry.

Retail Analysts | Media Personnel | Retail Industry Leaders | E-commerce Logistics & Supply Chain Leaders |

This report enables retail publications and analysts focusing on Holiday sales and e-commerce logistics with carrier performance metrics for package delays across **key regions, carrier service types, and retail categories**. Retail merchants can leverage this report to make data-backed decisions to optimize their supply chain during the critical Holiday season.

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Holiday Sales 2020 by the Numbers

In what is expected to be a longer than usual Holiday season, retail sales is set to hit an all time high during 2020. As the COVID-19 pandemic reshapes the retail landscape, more consumers have begun shopping online in greater numbers and frequency.

According to **new data from IBM's U.S. Retail Index,** the pandemic has accelerated the shift away from physical stores to digital shopping by roughly **five years.**

In total, consumers plan to spend **$997.79** on gifts, holiday items such as decorations and food, and additional "non-gift" purchases for themselves and their families, according to the annual survey released by the **National Retail Federation and Prosper Insights & Analytics.**

2020 U.S. HOLIDAY SALES HIGHLIGHTS

- **Forrester** sees online retail growing 18.5% this year, with an overall penetration of 20.2% in North America

- Per **Deloitte's annual holiday retail forecast**, ecommerce sales are predicted to grow by 25% to 35% YoY this holiday season, compared to last year's 14.7% increase.

- **Adobe Analytics**, which measures sales at 80 of the top 100 U.S. online retailers, predicts a total of $189 billion in online holiday sales, a 33 percent increase compared to last year. That's equal to two years worth of holiday e-commerce sales growth shoved into one season.

Undoubtedly, one of the main spurs behind this rise in e-Commerce sales and home deliveries is the widespread adoption of online shopping by safety-conscious consumers.

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The Impact of Covid-19 on Holiday Shipping

As the coronavirus outbreak has spread, particular challenges have risen in retail supply chains. The pandemic's far-reaching effects have weighed heavily on the operational capabilities of shipping carriers and their employees alike. This is raising concerns among small parcel shippers over package-handling capacity of carriers and their ability to meet on-time delivery promises.

Retailers are taking extraordinary measures to support the demand for in-store and curbside pickups of online orders. Supply-chain leaders are building strategies to effectively manage procurement, mitigate inventory challenges and reduce the impact of package delays on consumers.

KEY UPDATES FROM UPS AND FEDEX FOR THE 2020 HOLIDAY SEASON

- For the holidays, FedEx is hiring **70,000** temporary workers to meet the increase in parcel volume

- UPS is hiring more than **100,000** temporary employees to keep up with the surge in holiday deliveries

- UPS & FedEx will levy peak surcharges for the holiday season to even out the surge in parcel volumes and high operational costs when fulfilling orders in the midst of a pandemic, making shipping more expensive for retailers.

And as e-commerce consumers continue to avoid stores, shipping carriers, who've been overwhelmed by demand since March, are responding with more fulfillment and distribution capacity besides hiring temporary workforce. Carriers are also levying additional surcharges to meet the demands of delivering residential packages amid volume surges.

UPS and FedEx : On-time Delivery Performance Analysis

The following section is the result of a trend analysis conducted on packages shipped between the 2019 Holiday season and Jan – Oct 2020. You will find a detailed breakdown of package delays by UPS and FedEx across key States, Cities, Ground Service-types, Express Services-types, and Retail Categories.

KEY HIGHLIGHTS FROM THE ANALYSIS

✓ Amid key states in the U.S., packages shipped to California during the 2019 Holiday season through **UPS** observed the highest package delay rate at **12.2%** while packages shipped with FedEx to California faced a delay rate of **13.7%**.

✓ During the peak of the pandemic, packages shipped through **UPS** to key states like California and New York recorded the highest delay rates at **12.8%** and **12.45%** respectively. And, during the same period, packages shipped with **FedEx** to California and New York faced delay rates of **10.16%** and **9.44%** respectively.

✓ Among key cities in the U.S which witnessed Holiday package delays during 2019, package deliveries to New York through **UPS** faced the most delays at 10.2%, followed by Los Angeles at **8.5%**. During the pandemic, **UPS** packages to New York faced the most delays at **14.9%**, followed by Los Angeles at **11.6%**.

✓ Among key cities in the U.S which witnessed Holiday package delays during 2019, New York faced the most delays at **15.7%** for packages shipped through **FedEx**. And, during the pandemic, **FedEx** packages shipped to Chicago and New York faced delay rates of **11.6%** and **9.36%** respectively.

✓ Straining **UPS Ground** networks resulted in a package delay rate of **10%** during the 2019 Holiday season. During the pandemic, packages shipped through **UPS Ground** services recorded a delay rate of **12.1%**.

✓ Packages shipped through **FedEx Ground** services recorded a delay rate of **19.8%** during the 2019 Holidays and during the pandemic **FedEx Ground** services faced a package delay rate of **12.8%**.
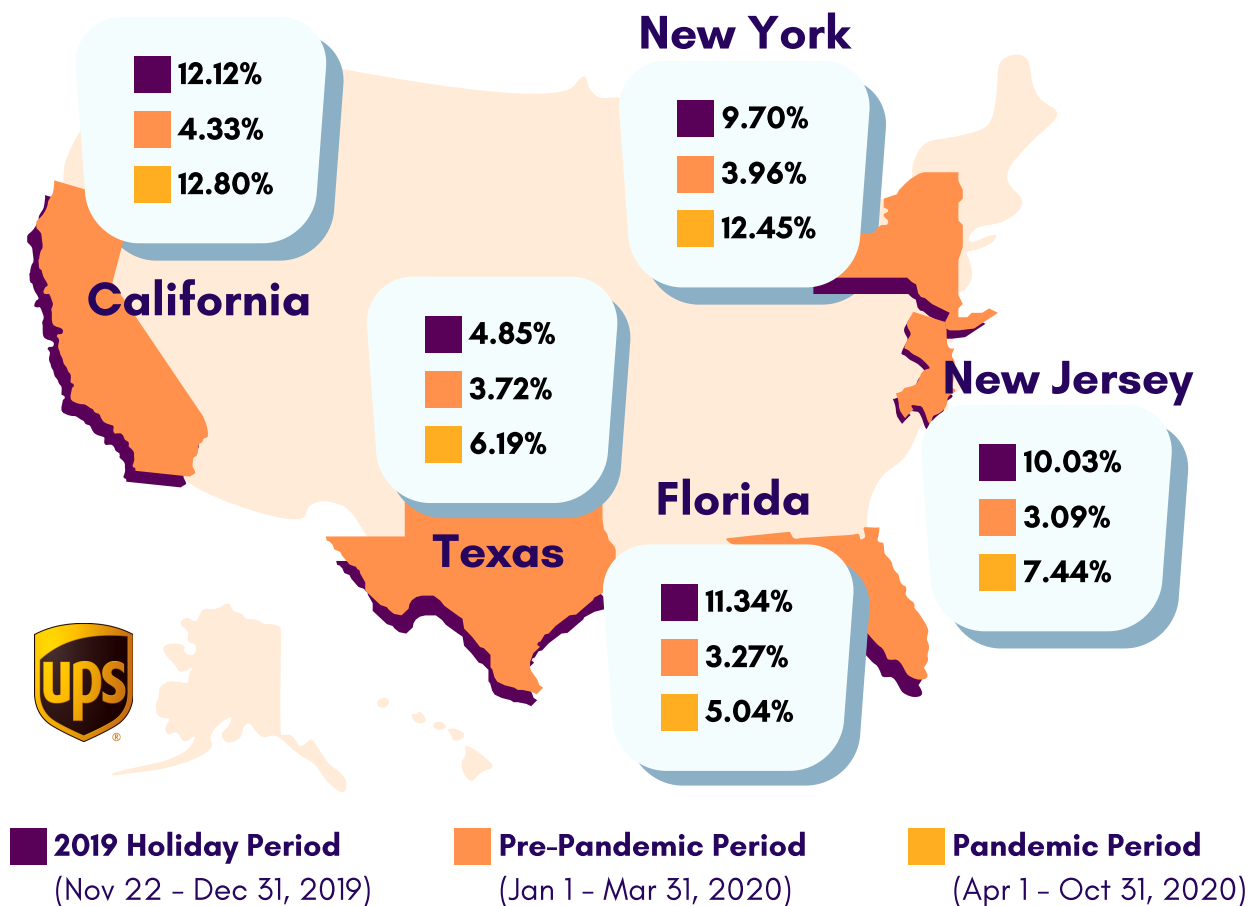
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✓ During the 2019 Holiday season, **UPS Next Day Air** observed the highest delay rate at **15.7%**. And during the pandemic, a record **11.1%** of packages shipped through UPS Next Day Air service were delayed.

✓ During the 2019 Holidays, **FedEx Overnight Express service** recorded a delay rate of **7.9%**, while the same service recorded a package delay rate of **14.7%** during the pandemic.

✓ **FedEx 2 Day Express** service recorded a package delay rate of **3.52%** during the 2019 Holiday season and during the peak of the pandemic, **7.4%** of packages delivered through the same service type were delayed.

✓ For **UPS**, during the 2019 Holiday season, retailers dealing with Food items observed the most package delays at **13.2%** while the Healthcare and Fitness category saw a delay rate of **11.3%**. And at the peak of the pandemic, the essential Food category saw a delay rate of **15.5%**, while Sports and Healthcare & Fitness categories witnessed package delay rates of **12.3%** and **11.3%** respectively.

✓ For **FedEx**, during the 2019 Holiday season, retailers dealing with Jewelry items observed the most package delays at **15.5%** while the Apparel category saw a delay rate of **14.9%**. And at the peak of the pandemic, the Jewelry category observed a delay rate of **14.4%** while the Sports and Apparel categories witnessed package delay rates of **13%** and **11.3%** respectively.

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Delivery Delays Across Key U.S. States

UPS PACKAGE DELAYS IN TOP STATES

Amid the Holiday season rush during 2019, the package delay rate in **California** was the highest with **12.12%.** During the peak of the pandemic, packages shipped to **California** faced most delays with **12.8%** packages delayed.

Texas witnessed the lowest package delay rate at **4.85%** during 2019 Holidays, while only **5.04%** of packages shipped to **Florida** during the pandemic were delayed.

California
- 12.12%
- 4.33%
- 12.80%

New York
- 9.70%
- 3.96%
- 12.45%

Texas
- 4.85%
- 3.72%
- 6.19%

New Jersey
- 10.03%
- 3.09%
- 7.44%

Florida
- 11.34%
- 3.27%
- 5.04%

UPS

- **2019 Holiday Period** (Nov 22 – Dec 31, 2019)
- **Pre-Pandemic Period** (Jan 1 – Mar 31, 2020)
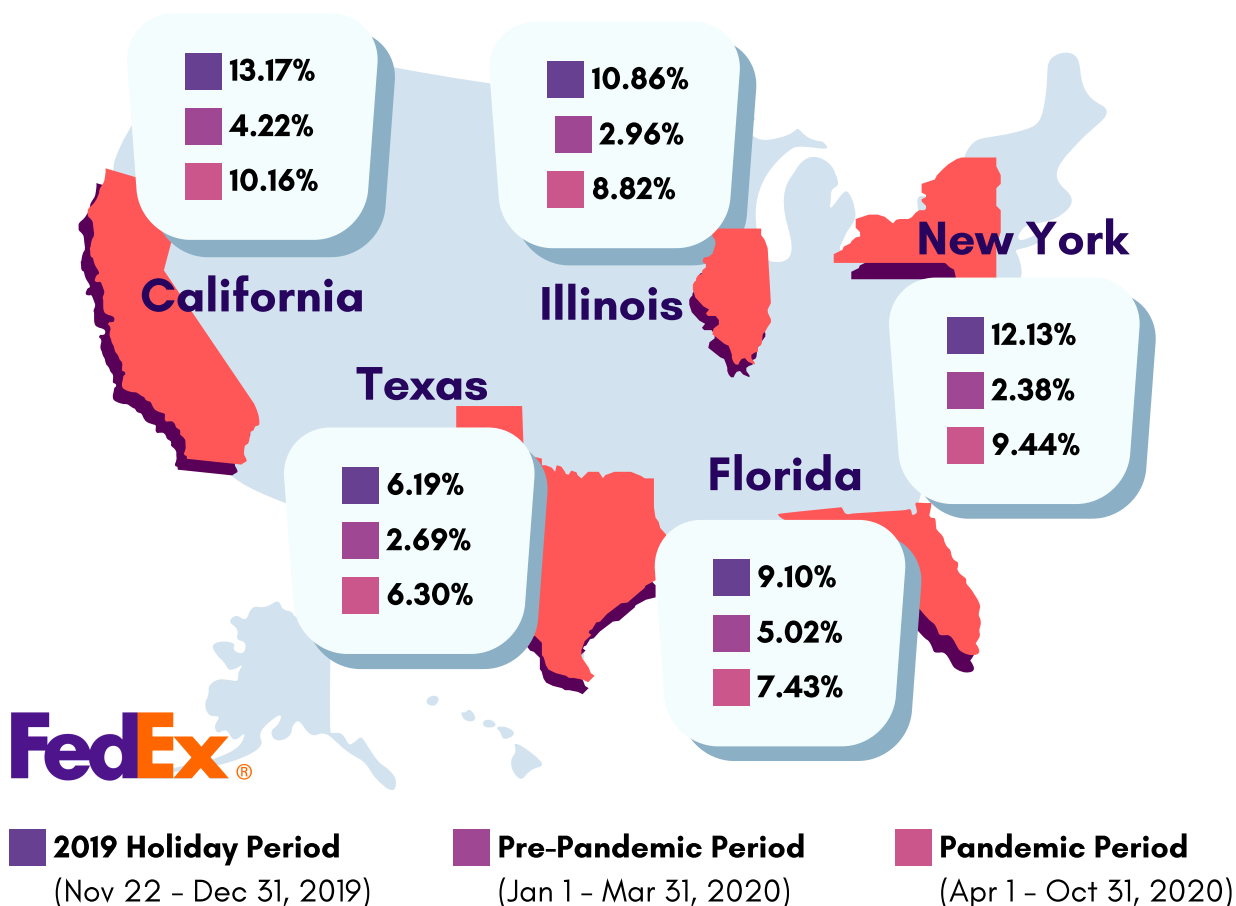- **Pandemic Period** (Apr 1 – Oct 31, 2020)

FEDEX PACKAGE DELAYS IN TOP STATES

During the 2019 Holiday season, **California** recorded the highest number of package delays with **13.7%** of Holiday packages delivered later than expected. During the peak of the pandemic, packages shipped to California faced most delays with **10.16%** packages delayed.

And during the 2019 Holidays, **12.13%** of packages shipped to **New York** were delayed, while **during the pandemic**, **9.44%** of packages shipped to **New York** faced delays.

California
- 13.17%
- 4.22%
- 10.16%

Illinois
- 10.86%
- 2.96%
- 8.82%

New York
- 12.13%
- 2.38%
- 9.44%

Texas
- 6.19%
- 2.69%
- 6.30%

Florida
- 9.10%
- 5.02%
- 7.43%

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2019 Holiday Period (Nov 22 – Dec 31, 2019)

Pre-Pandemic Period (Jan 1 – Mar 31, 2020)

Pandemic Period (Apr 1 – Oct 31, 2020)
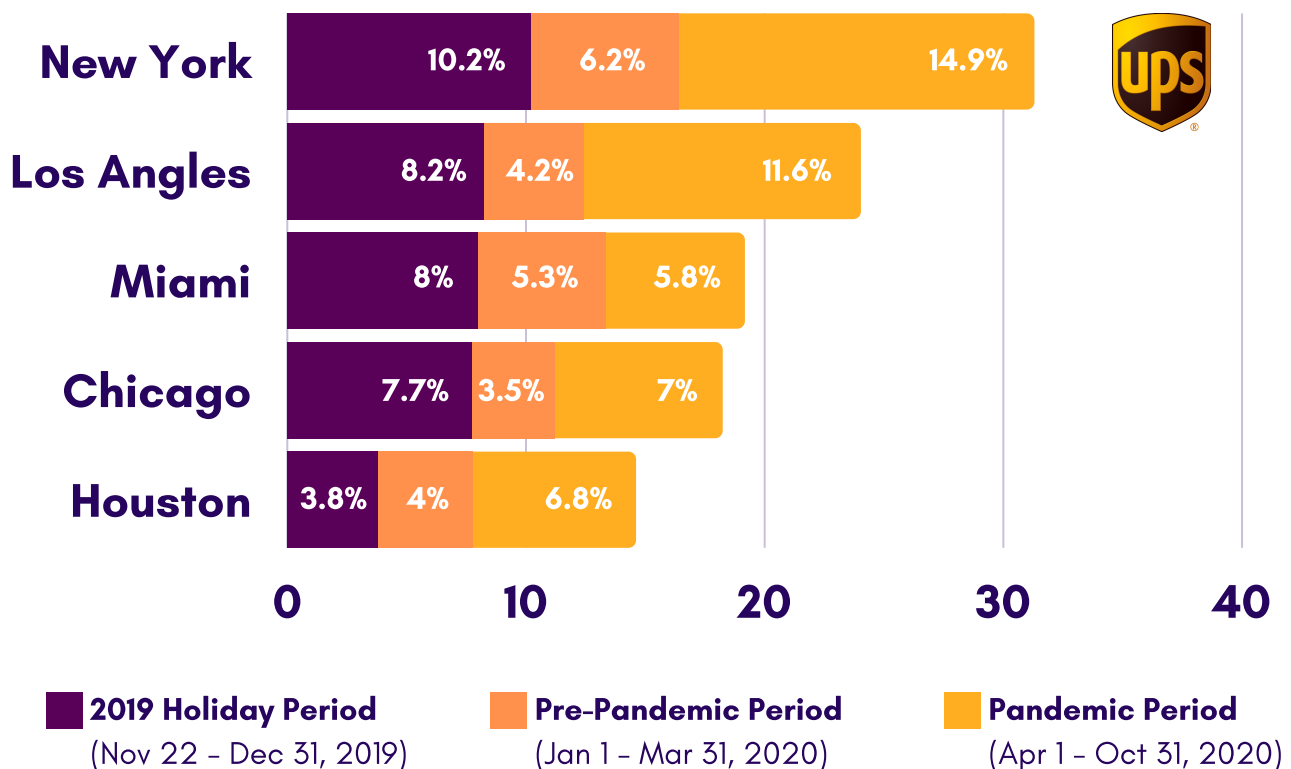
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Delivery Delays Across Key U.S. Cities

UPS PACKAGE DELAYS IN TOP CITIES

Amid key cities in the U.S which witnessed Holiday package delays during 2019, **New York** faced the most delays at **10.2%**, followed by **Los Angeles** at **8.2%**.

During the pandemic, packages shipped through **UPS** to **New York** faced the most delays at **14.9%,** followed by **Los Angeles** at **11.6%**.

City	2019 Holiday Period	Pre-Pandemic Period	Pandemic Period
New York	10.2%	6.2%	14.9%
Los Angles	8.2%	4.2%	11.6%
Miami	8%	5.3%	5.8%
Chicago	7.7%	3.5%	7%
Houston	3.8%	4%	6.8%

2019 Holiday Period (Nov 22 – Dec 31, 2019)

Pre-Pandemic Period (Jan 1 – Mar 31, 2020)

Pandemic Period (Apr 1 – Oct 31, 2020)

FEDEX PACKAGE DELAYS IN TOP CITIES

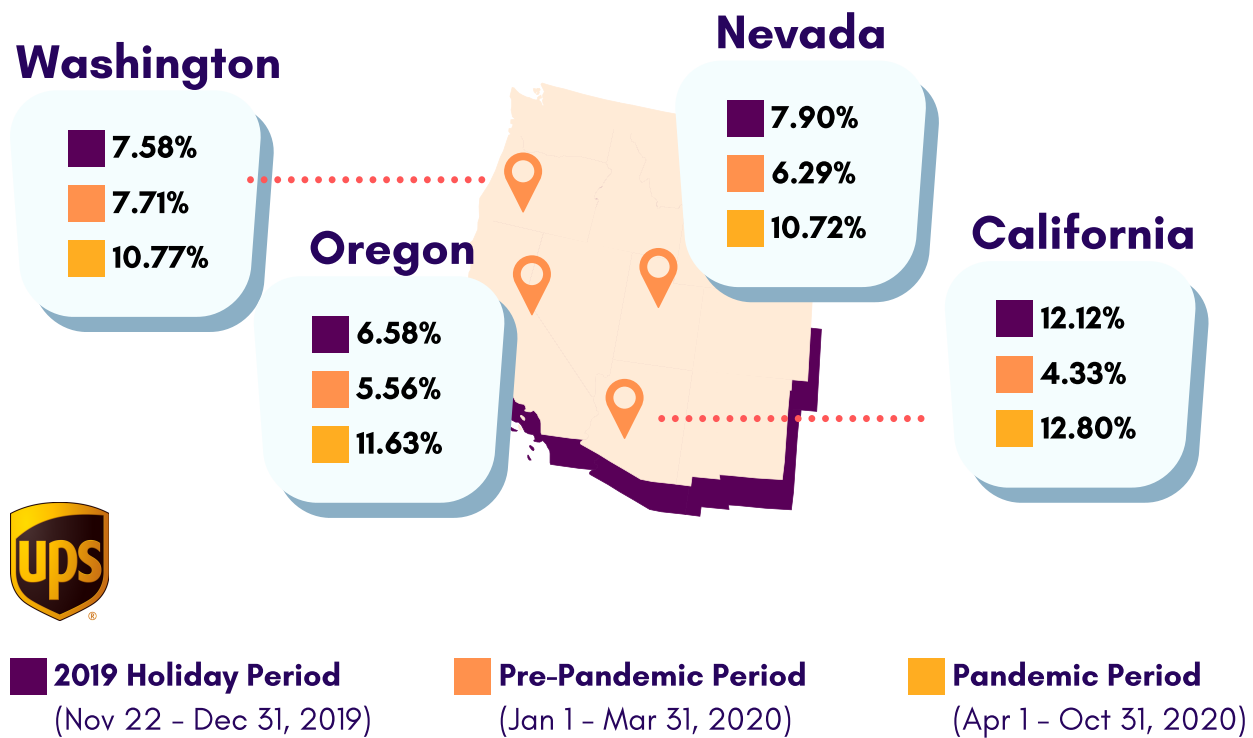Among key cities in the U.S which witnessed Holiday package delays during 2019, **New York** faced the most delays at **15.7%**. **During the pandemic**, packages shipped to **Chicago** and **New York** through **FedEx** faced delay rates of **11.6%** and **9.4%** respectively.

City	2019 Holiday Period	Pre-Pandemic Period	Pandemic Period
New York	15.7%	3.1%	9.4%
Miami	5.7%	12.4%	8.4%
Chicago	10.7%	4.1%	11.6%
Los Angles	8.5%	5.5%	6.8%
Houston	8.5%	3.2%	8.8%

2019 Holiday Period (Nov 22 – Dec 31, 2019)   **Pre-Pandemic Period** (Jan 1 – Mar 31, 2020)   **Pandemic Period** (Apr 1 – Oct 31, 2020)
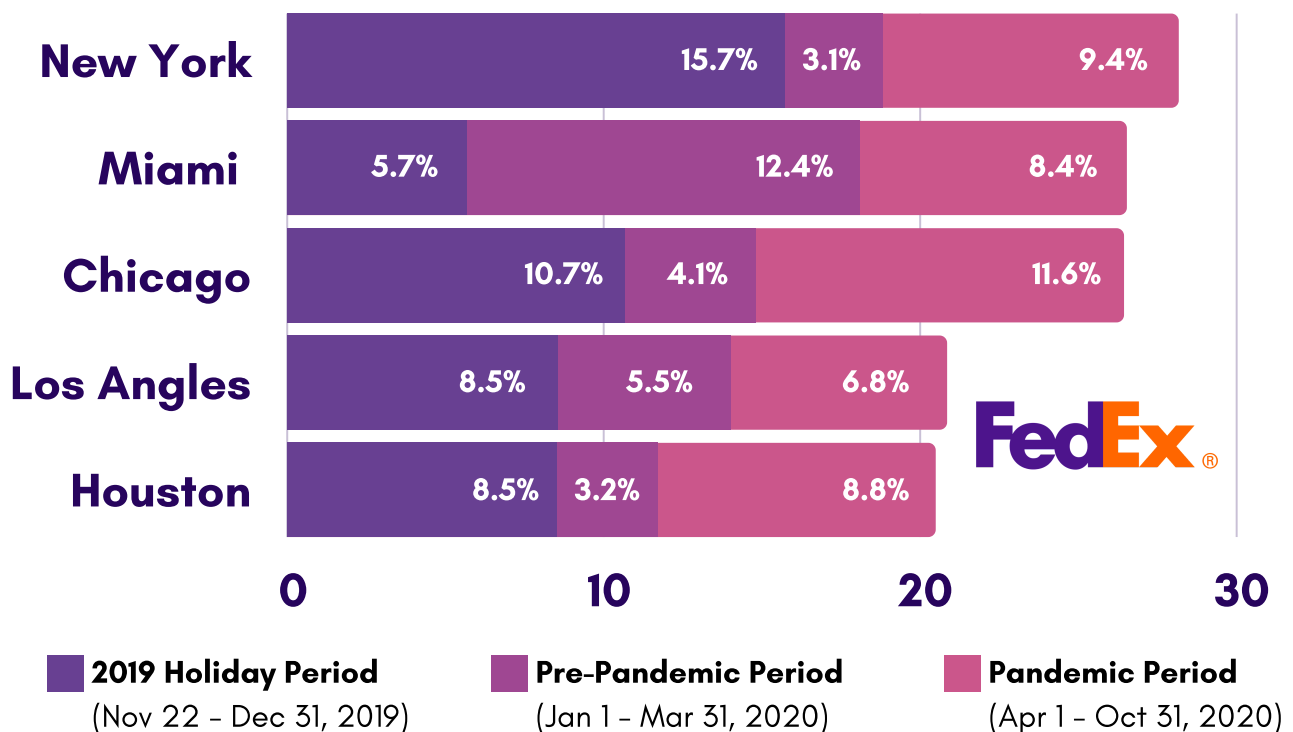
Delivery Delays Across West Coast, Central Region and East Coast
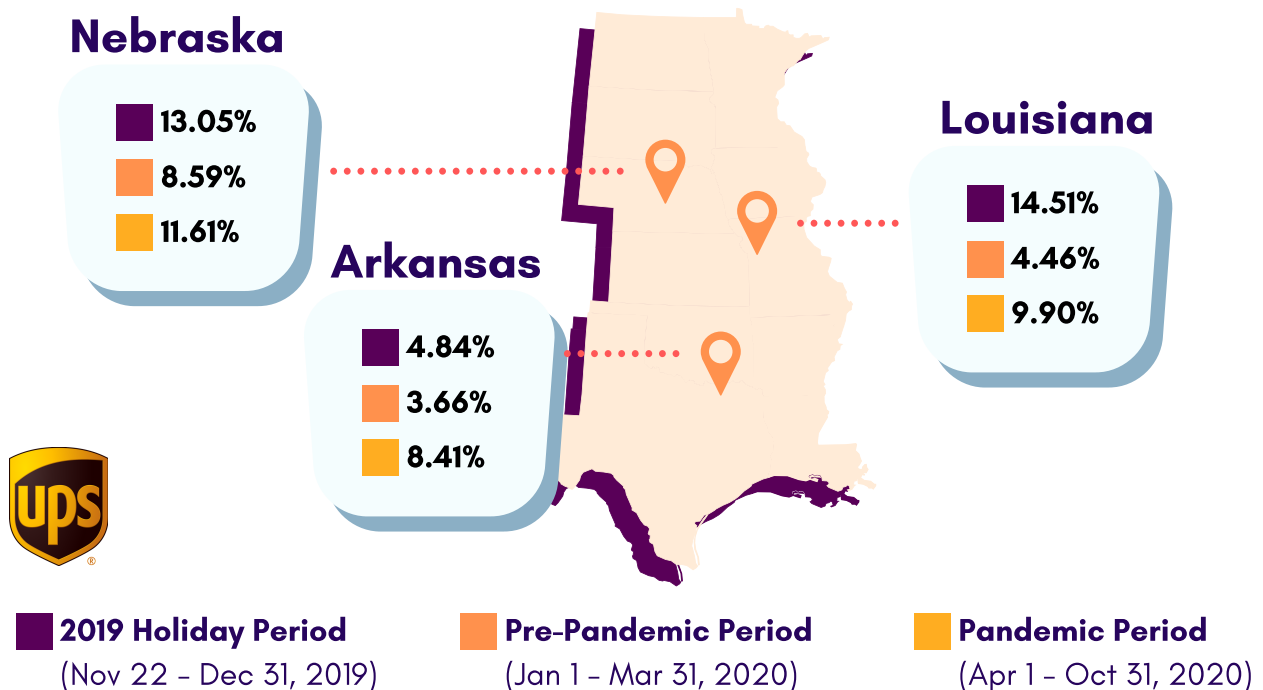
UPS PACKAGE DELAYS ON THE WEST COAST

Amid states on the West Coast which witnessed Holiday package delays during 2019, **California** faced the most delays at **12.12%**, followed closely by **Nevada** and **The State of Washington** at **7.9%** and **7.58%** respectively. During the pandemic, packages shipped through UPS to **California** faced the most delays at **12.8%**.

Washington
- 7.58%
- 7.71%
- 10.77%

Oregon
- 6.58%
- 5.56%
- 11.63%

Nevada
- 7.90%
- 6.29%
- 10.72%

California
- 12.12%
- 4.33%
- 12.80%

UPS

- **2019 Holiday Period** (Nov 22 – Dec 31, 2019)
- **Pre-Pandemic Period** (Jan 1 – Mar 31, 2020)
- **Pandemic Period** (Apr 1 – Oct 31, 2020)

UPS PACKAGE DELAYS IN THE CENTRAL REGION

In the Central Region, during the 2019 Holidays, packages shipped to **Louisiana** through UPS faced the most delays at **14.51%**. During the same period, packages shipped to **Nebraska** faced a delay rate of **13.05%**.During the pandemic, packages shipped to **Nebraska** through UPS recorded the highest package delay rate at **11.61%**.

Nebraska

- 13.05%
- 8.59%
- 11.61%

Arkansas

- 4.84%
- 3.66%
- 8.41%

Louisiana

- 14.51%
- 4.46%
- 9.90%

■ **2019 Holiday Period**
(Nov 22 – Dec 31, 2019)

■ **Pre-Pandemic Period**
(Jan 1 – Mar 31, 2020)

■ **Pandemic Period**
(Apr 1 – Oct 31, 2020)

UPS PACKAGE DELAYS IN THE EAST COAST

On the East Coast, states in the U.S which witnessed the most package delays during the 2019 Holidays, are **Delaware** at **13.96%** and **New York** at **9.7%**.

During the pandemic, packages shipped to **New York** through UPS faced the most package delays, recording a delay rate of **12.45%**.

New York

- 9.70%
- 3.96%
- 12.45%

Delaware

- 13.96%
- 3.33%
- 10.75%

North Carolina

- 7.53%
- 2.19%
- 9.84%

South Carolina

- 7.35%
- 2.23%
- 9.64%

UPS

- **2019 Holiday Period** (Nov 22 – Dec 31, 2019)
- **Pre-Pandemic Period** (Jan 1 – Mar 31, 2020)
- **Pandemic Period** (Apr 1 – Oct 31, 2020)

FEDEX PACKAGE DELAYS ON THE WEST COAST

Amid states on the West Coast which witnessed Holiday package delays during 2019, **Washington** faced the most delays at **15.33%**, followed closely by **Oregon** and **California** at **14.44%** and **13.17%** respectively.

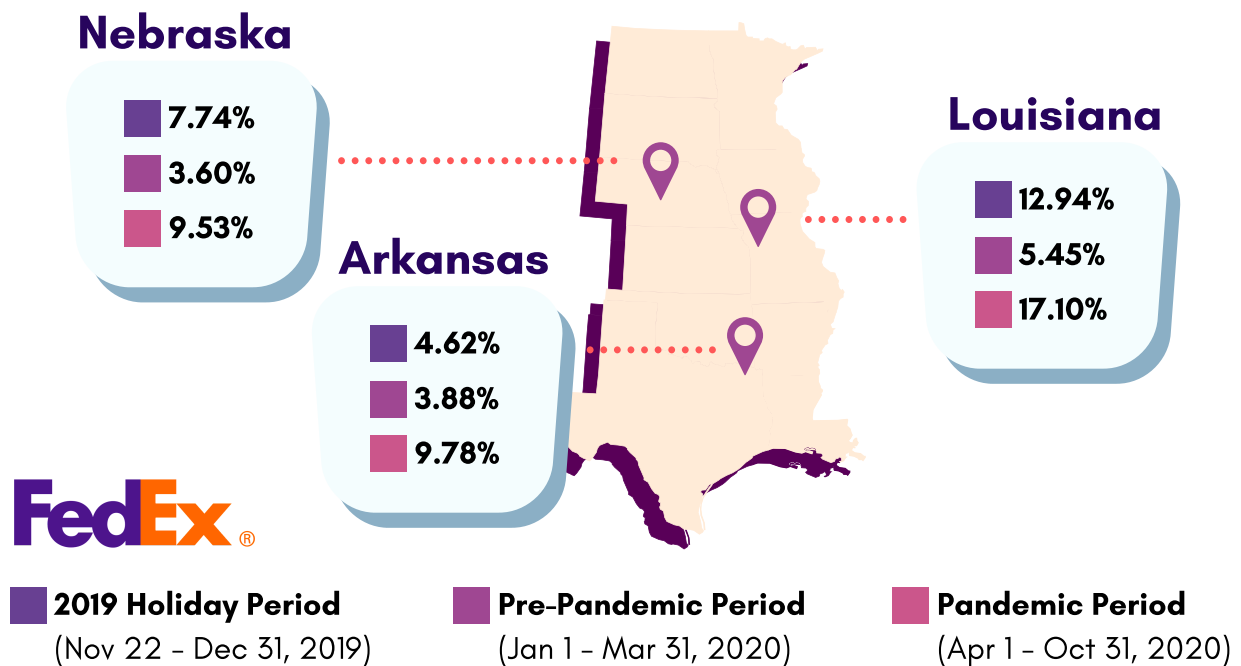During the pandemic, packages shipped through FedEx to **Oregon** faced the most delays at **15.82%**.

Washington
- 15.33%
- 5.64%
- 14.50%

Oregon
- 14.44%
- 5.35%
- 15.82%

Nevada
- 8.16%
- 6.19%
- 5.15%

California
- 13.17%
- 4.22%
- 10.16%

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■ **2019 Holiday Period** (Nov 22 – Dec 31, 2019)

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■ **Pandemic Period** (Apr 1 – Oct 31, 2020)
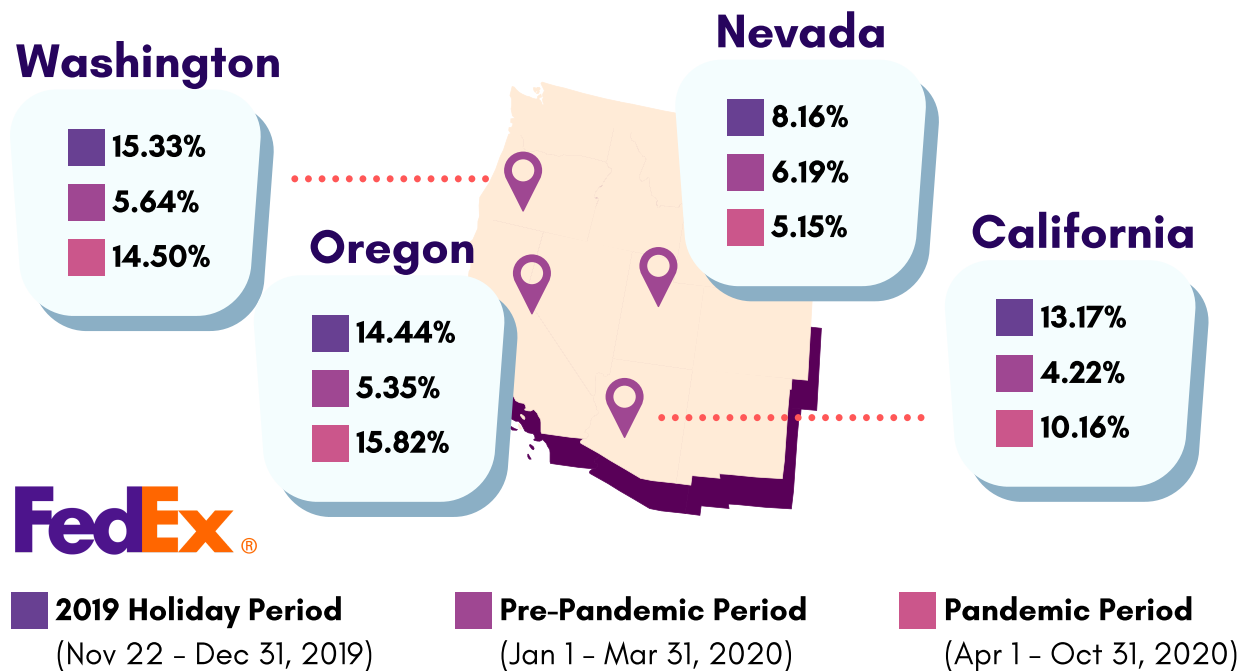
FEDEX PACKAGE DELAYS IN THE CENTRAL REGION

In the Central Region, Holiday packages shipped to **Louisiana** through FedEx faced the most delays during 2019 at **12.94%**.

During the pandemic, packages shipped to **Louisiana** through FedEx faced a high delay rate of **17.10%**. Also, **9.53%** of packages shipped to **Nebraska** and **9.78%** of packages shipped to **Arkansas** during the pandemic were delayed.
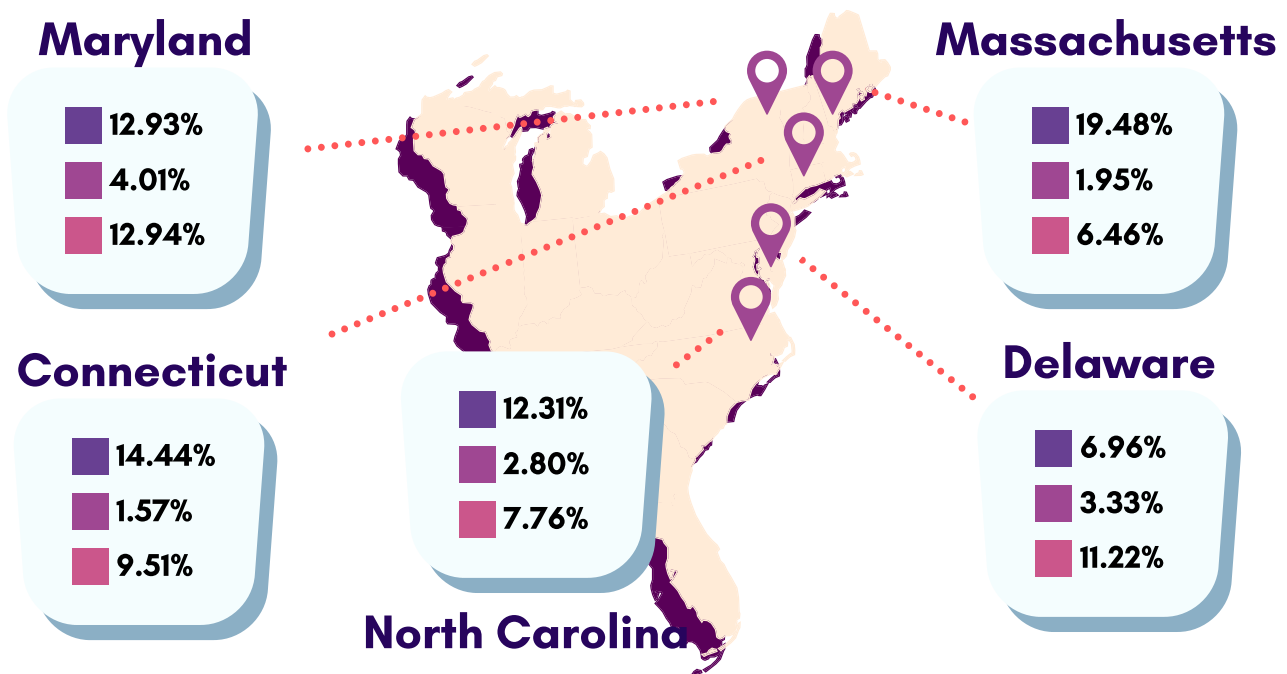
Nebraska

- 7.74%
- 3.60%
- 9.53%

Arkansas

- 4.62%
- 3.88%
- 9.78%

Louisiana

- 12.94%
- 5.45%
- 17.10%

FedEx®

- **2019 Holiday Period** (Nov 22 – Dec 31, 2019)
- **Pre-Pandemic Period** (Jan 1 – Mar 31, 2020)
- **Pandemic Period** (Apr 1 – Oct 31, 2020)

FEDEX PACKAGE DELAYS ON THE EAST COAST

On the East Coast, states in the U.S which witnessed the most package delays during the 2019 Holidays, are **Massachusetts** at **19.48%** and **Connecticut** at **14.44%**.

During the pandemic, packages shipped to **Maryland** through FedEx faced the most package delays, recording a delay rate of **12.94%**.

Maryland

- 12.93%
- 4.01%
- 12.94%

Connecticut

- 14.44%
- 1.57%
- 9.51%

North Carolina

- 12.31%
- 2.80%
- 7.76%

Massachusetts

- 19.48%
- 1.95%
- 6.46%

Delaware

- 6.96%
- 3.33%
- 11.22%

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- **2019 Holiday Period** (Nov 22 – Dec 31, 2019)
- **Pre-Pandemic Period** (Jan 1 – Mar 31, 2020)
- **Pandemic Period** (Apr 1 – Oct 31, 2020)

# Delivery Delays Across Key Carrier Service Types

UPS GROUND SERVICE PACKAGE DELAYS

Surge in Holiday shipments during 2019, and straining UPS Ground networks resulted in a package delay rate of **10%**. During the pandemic, with Ground networks disrupted and unprecedented shipping volumes, UPS packages shipped through their Ground services recorded a delay rate of **12.1%**.

2019 Holiday Period
(Nov 22 – Dec 31, 2019) — 10%

Pre-Pandemic Period
(Jan 1 – Mar 31, 2020) — 4.3%

Pandemic Period
(Apr 1 – Oct 31, 2020) — 12.1%

Scale: 0   5   10   15
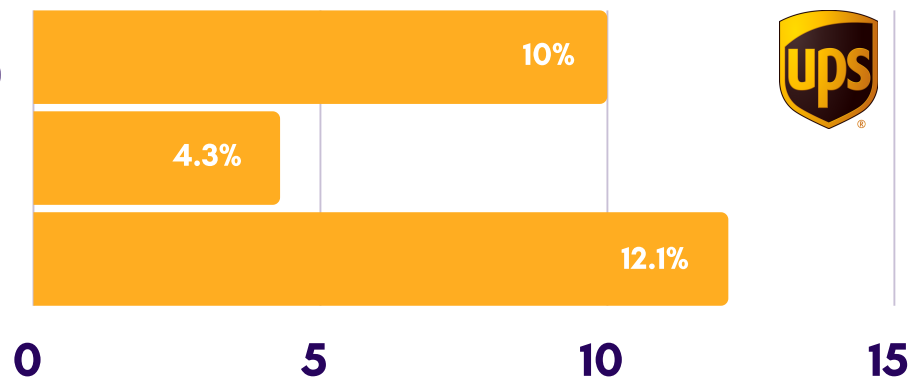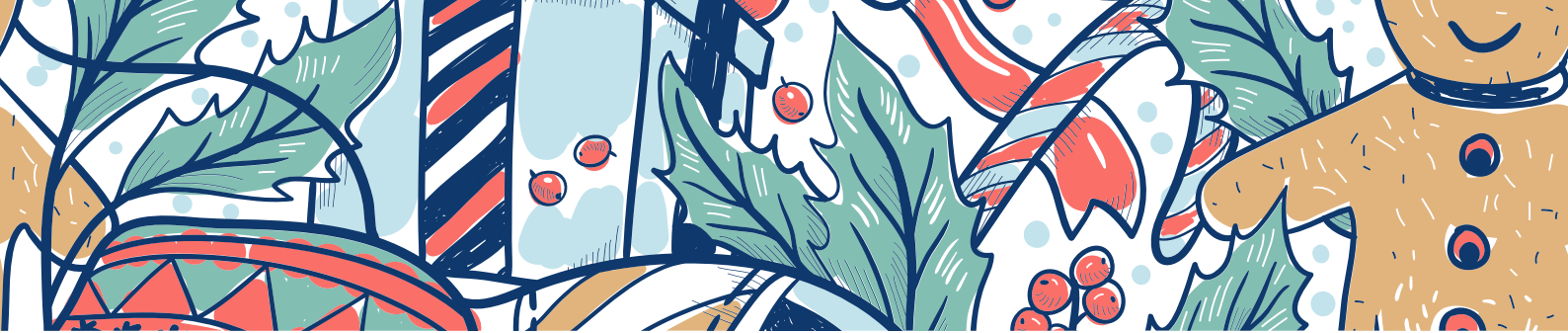
FEDEX GROUND SERVICE PACKAGE DELAYS

Packages shipped through FedEx Ground service, the most popular e-commerce shipping service, recorded a delay rate of **19.8%** during the 2019 Holidays. During the pandemic, with surge in shipment volumes and consumers opting for safe and mostly residential deliveries, FedEx Ground service faced a package delay rate of **12.8%**.

2019 Holiday Period
(Nov 22 – Dec 31, 2019) — 19.8%

Pre-Pandemic Period
(Jan 1 – Mar 31, 2020) — 5.3%

Pandemic Period
(Apr 1 – Oct 31, 2020) — 12.8%
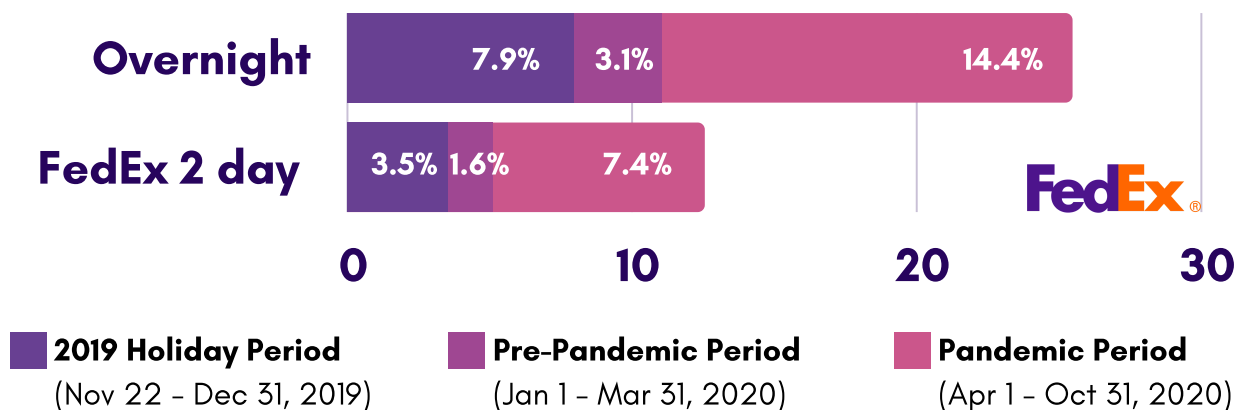
Scale: 0   5   10   15   20
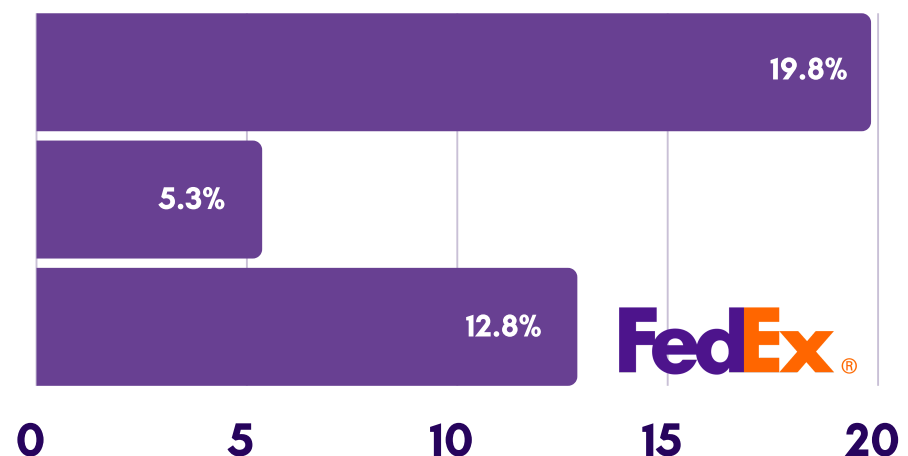
UPS EXPRESS SERVICE PACKAGE DELAYS

During the 2019 Holiday season, **UPS 2nd Day Air**, a popular express shipping service observed the highest delay rate at **13.7%**. And during the pandemic, with UPS straining to manage the unexpected demand for essential deliveries and broken air networks contributing to service disruptions, a record **11.1%** of packages shipped through UPS **Next Day Air service** were delayed.

UPS Next Day Air — 11.2% | 7.4% | 11.1%
UPS 2nd Day Air — 13.7% | 3.4% | 9.7%
UPS 3 Day Select — 10.6% | 3.5% | 7.7%

0   10   20   30

UPS

■ **2019 Holiday Period**
(Nov 22 – Dec 31, 2019)

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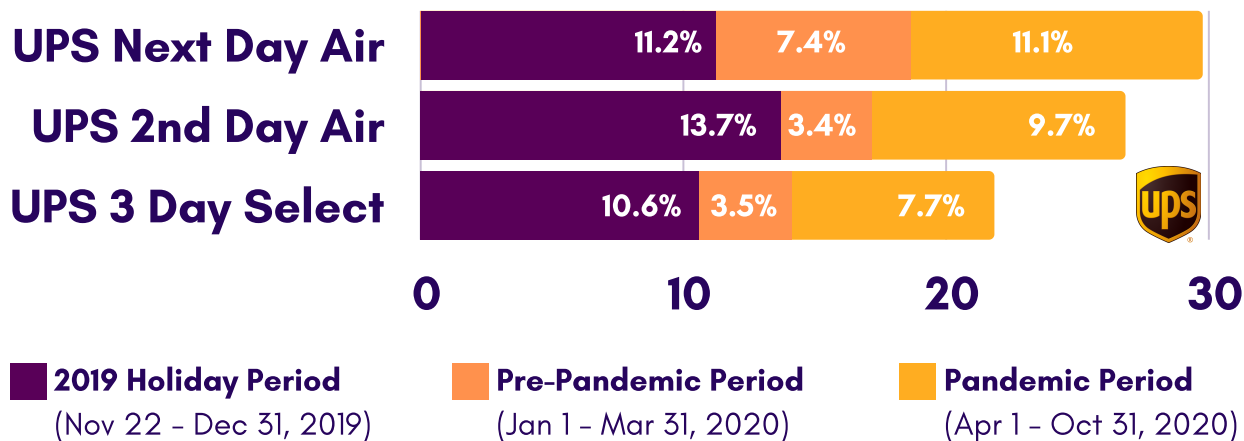
FEDEX EXPRESS SERVICE PACKAGE DELAYS

During the 2019 Holidays, **FedEx Overnight** service recorded a delay rate of **7.9%**. While the same service recorded a package delay rate of **14.4%** during the pandemic. **FedEx 2 Day** service recorded a package delay rate of **3.5%** during the 2019 Holiday season and during the peak of the pandemic, **7.4%** of packages delivered through the same service type were delayed.

Overnight — 7.9% | 3.1% | 14.4%
FedEx 2 day — 3.5% | 1.6% | 7.4%

0   10   20   30

FedEx®

■ **2019 Holiday Period**
(Nov 22 – Dec 31, 2019)

■ **Pre-Pandemic Period**
(Jan 1 – Mar 31, 2020)

■ **Pandemic Period**
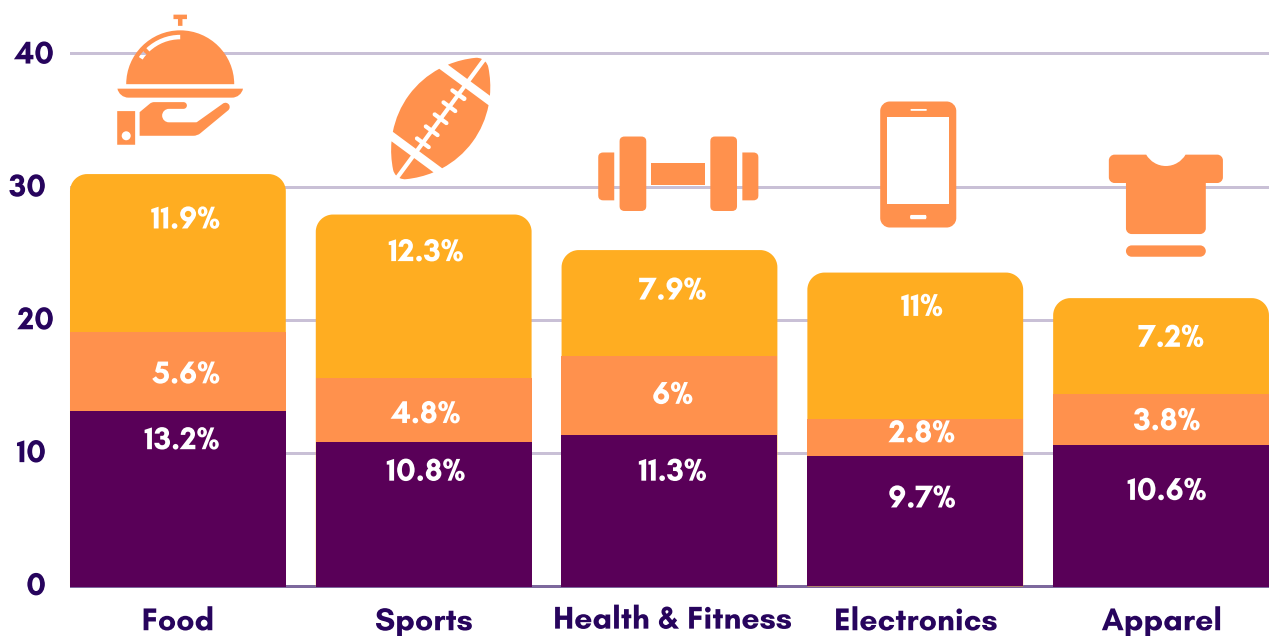(Apr 1 – Oct 31, 2020)

Delivery Delays Across Key Retail Categories

UPS PACKAGE DELAYS ACROSS RETAIL CATEGORIES

With a tremendous surge in consumer demand for essential goods and some non–essential goods, most retailers rapidly responded to accommodate supply chain strain and package delays due to the pandemic.

During the 2019 Holiday season, retailers dealing with **Food** items observed the most package delays at **13.2%** while the **Health and Fitness** category saw a delay rate of **11.3%**

And at the peak of the pandemic, the essential **Food** category saw a delay rate of **11.9%**, while **Sports, Electronics** categories witnessed package delay rates of **12.3%** and **11%** respectively.

	Food	Sports	Health & Fitness	Electronics	Apparel
Pandemic Period	11.9%	12.3%	7.9%	11%	7.2%
Pre-Pandemic Period	5.6%	4.8%	6%	2.8%	3.8%
2019 Holiday Period	13.2%	10.8%	11.3%	9.7%	10.6%

2019 Holiday Period
(Nov 22 – Dec 31, 2019)

Pre-Pandemic Period
(Jan 1 – Mar 31, 2020)
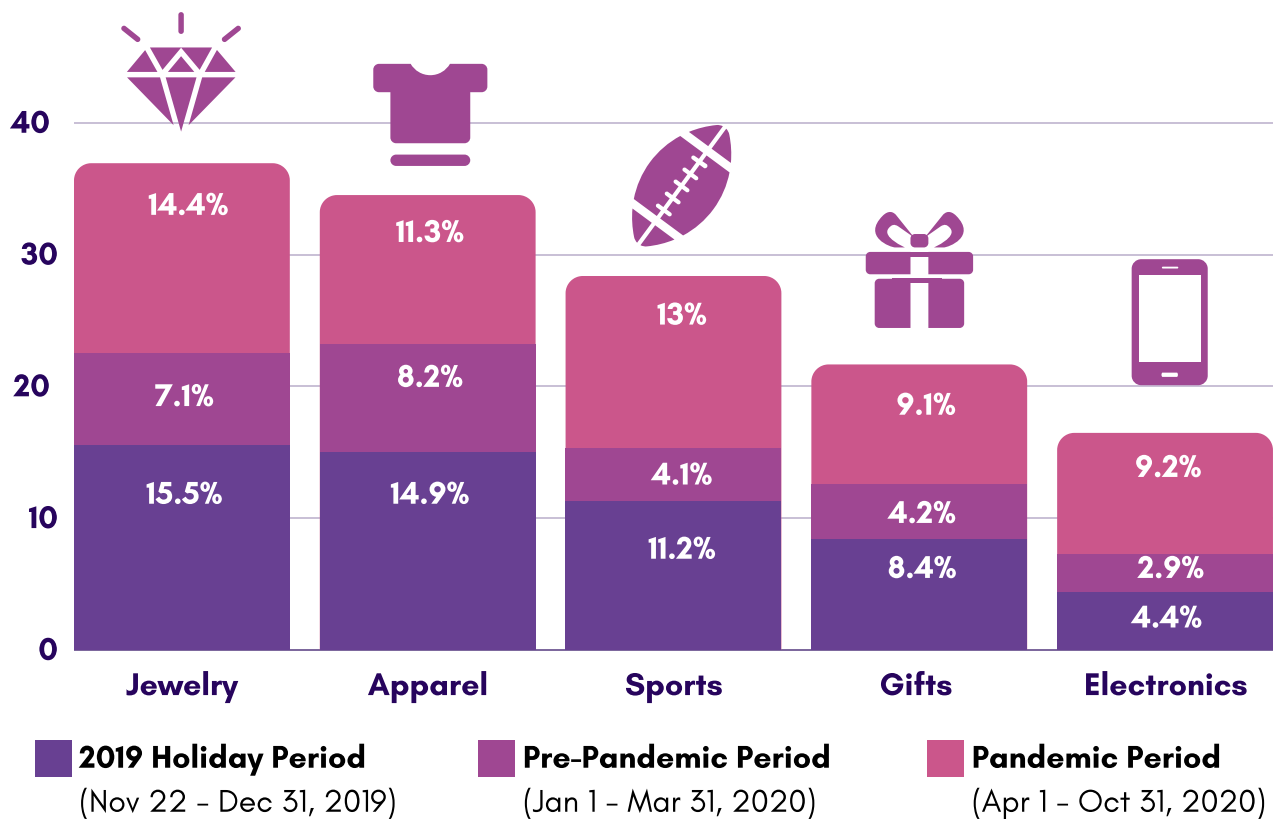
Pandemic Period
(Apr 1 – Oct 31, 2020)

UPS

FEDEX PACKAGE DELAYS ACROSS RETAIL CATEGORIES

FedEx is struggling to cope as the Covid-19 pandemic is escalating. With disrupted shipping networks nationwide, a broad range of products in various categories shipped through FedEx faced delays.

During the 2019 Holiday season, retailers dealing with **Jewelry** items observed the most package delays at **15.5%** while the **Apparel** category saw a delay rate of **14.9%**.

And at the peak of the pandemic, the **Jewelry** category observed a delay rate of **14.4%** while the **Sports and Apparel** categories witnessed package delay rates of **13%** and **11.3%** respectively.

	Jewelry	Apparel	Sports	Gifts	Electronics
Pandemic Period	14.4%	11.3%	13%	9.1%	9.2%
Pre-Pandemic Period	7.1%	8.2%	4.1%	4.2%	2.9%
2019 Holiday Period	15.5%	14.9%	11.2%	8.4%	4.4%

2019 Holiday Period (Nov 22 – Dec 31, 2019)

Pre-Pandemic Period (Jan 1 – Mar 31, 2020)

Pandemic Period (Apr 1 – Oct 31, 2020)

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Holiday Shipping 2020 : Forecasting On-time Delivery Performance

Holiday 2020 will be an extended shopping season and an extraordinary year for retail shipping. According to **Salesforce**, digital commerce is set to see a **34 percent** growth in the U.S. (up from 12 percent in 2019) with total online sales expected to reach a new record high of **$221 billion**.

The traditional Holiday peak compounded with the pandemic-induced surge in online shopping will result in unprecedented spikes in package volumes and delivery delays. The Supply chain will remain top of mind for retailers while sweating over the peak surcharges levied by carriers to fulfil Holiday orders. Undoubtedly, shipping carriers like **UPS and FedEx** will be stretched to the limits in order to meet on-time delivery promises this Holiday season.

Holiday Shipping 2020 : Predictions, Trends & Insights

During the second and third quarters of 2020, retailers have experienced Holiday-like trends in online orders and delivery-related issues. Unprecedented jump in online orders due to Covid-19, urban lockdowns, insufficient workers and strict workplace safety protocols has already put an immense strain on shipping carriers.

- ✓ Online retailers, as well as shoppers, should brace themselves for the 2020 Holiday shopping season that will be troubled with potential package delays due to **Covid-19**

- ✓ Package delay rates during the 2020 Holiday season is expected to be **1.5x - 2x** worse than any Holiday season in the past

- ✓ Average package delay rates during the 2020 Holiday season to be between the range of **14% to 18%**

- ✓ Densely populated urban cities like **New York, Los Angeles**, **Chicago etc.** to face record package delays, even as high as **25% to 30%** during the 2020 Holidays

- ✓ Due to the service impact on popular e-commerce service types, both **Ground** and **Express** services offered by **UPS** and **FedEx** will remain affected, resulting in delivery delays irrespective of the service type retailers and consumers choose for Holiday orders

- ✓ With less congestion in airline networks, Holiday packages shipped through **Express** service types are more likely to reach their destinations on time, when compared to parcels shipped through **Ground** services.

- ✓ **FedEx** will perform better when compared to **UPS** from an on-time delivery standpoint since **FedEx** handles lower parcel volumes and have greater separation between their Ground and Express networks.

The overall number of holiday packages that will be sent out will exceed the handling capacity of shipping carriers, thereby missing promised delivery windows. In the run up to the holidays, the supply chain will take center stage and the winners are going to be those retailers who will take measures to mitigate the impact of delivery delays on customer experience and loyalty.

About LateShipment.com

At LateShipment.com, we are driven by an overarching mission to bring more transparency to the world of shipping. Our retail logistics solutions include cloud tools for small parcel shippers with a focus on post-purchase delivery experience and shipping cost optimization.

Trusted by thousands of companies worldwide, at LateShipment.com we have tracked over **100 million packages** shipped with **40+ shipping carriers** globally. With our unique industry position, we're able to leverage our global shipping data and expertise in fulfilment logistics to produce unbiased carrier performance reports aimed at empowering readers with trends and insights about the workings of the parcel shipping industry.

OUR SOLUTIONS

At **LateShipment.com**, we believe in making "shipping and delivery" a success lever for retail businesses of all sizes. We recognize that online merchants, despite incurring high costs for shipping, have limited control over their shipping carriers' service quality and the post-purchase experiences are often not shopper-centric. We strive to fix that power imbalance.

Our groundbreaking **Delivery Experience Management** platform helps businesses create memorable post-purchase customer experiences with tools to improve visibility, customer engagement and revenue growth after checkout.

Our **Automated Shipping Refunds** solution brings better performance accountability to shipping carrier services and recovers millions of dollars in refund claims for retail parcel shippers.

Visit **www.lateshipment.com** to find out more.

Disclaimer

The data and information in this report has been solely drawn from shipments tracked by LateShipment.com, on behalf of its customers. While particular care has been taken to ensure that all data sets analyzed are accurate and statistically relevant across the small parcel shipping industry, LateShipment.com is not responsible for any errors or omissions whatsoever.

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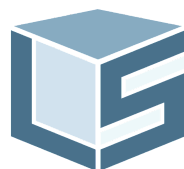
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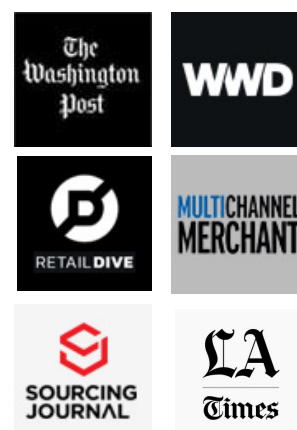
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