Good working conditions in parcel delivery services in Germany? An empirical analysis of working conditions from the perspective of employees

A summary of the study by INPUT Consulting gGmbH (Stuttgart) in collaboration with ver.di (November 2025)

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Background: The German parcel, express and courier market has grown significantly during the pandemic. Driven by online retail, we can document a sustained growth in shipments while employment numbers only grew moderately. This mismatch suggests an increased workload for employees. The parcel industry is also highly concentrated, with a few large providers predominantly and increasingly using small subcontractors for last-mile delivery and temporary agency workers. The outsourcing of employees has repeatedly been associated with precarious employment conditions and, in some cases, illegal working practices. Both characteristics – growth and industry structure – have consequences for working conditions.

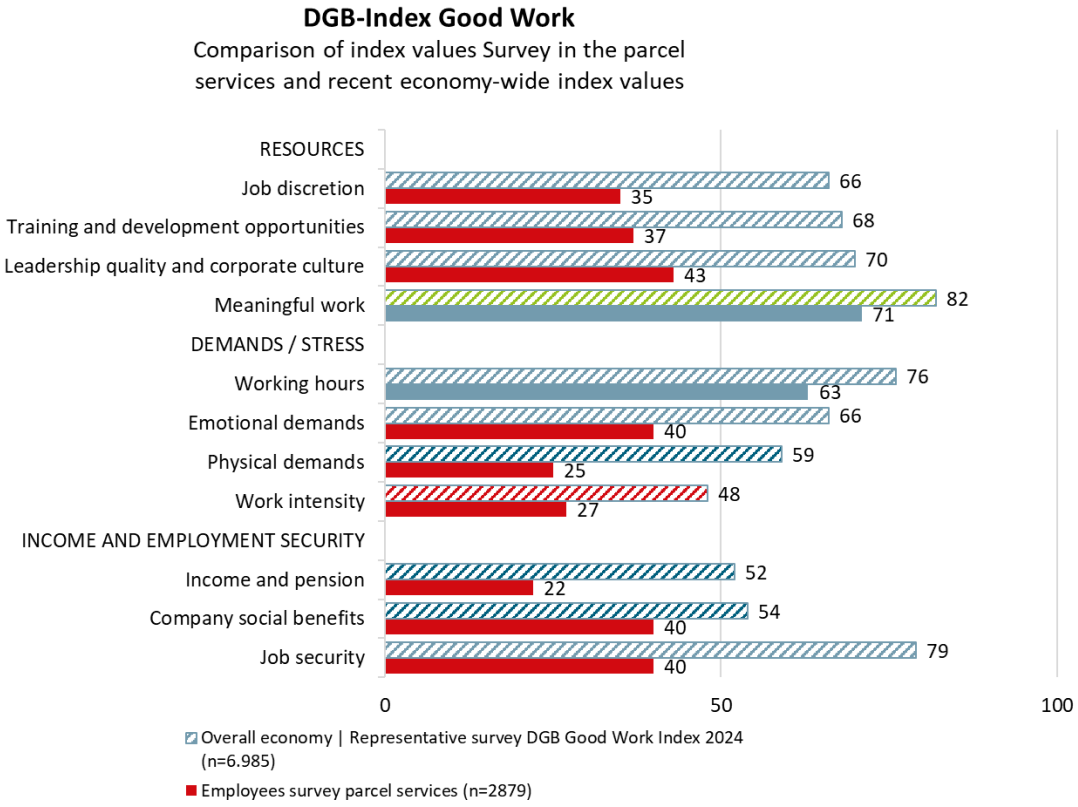
Objective: The objective of this study is to provide an empirical assessment of working conditions in parcel services based on a quantitative employee survey in the industry. In particular, the study aims to examine whether the assumptions made on the basis of qualitative studies and reports by practitioners (trade unions, advice services for employees, regulatory authorities) about increased workloads, precarious employment and violations of labour standards are reflected in the responses of employees. We also want to discuss whether this development affects distinct groups of employees in different ways and what consequences this has, for example, for the well-being of employees, their ability to work or workforce retention.

Methodological approach: Between February and May 2025, INPUT Consulting gGmbH conducted an online survey of nearly 3,000 employees in the parcel delivery industry about their key working conditions. In addition to the quality of work, which was assessed using the DGB Good Work Index[1], this research report discusses the dimensions of wages, working hours and labour law violations, differentiated according to the origin and collective bargaining coverage of the respondents. The questionnaire was available in 14 languages to include non-German speaking employees, who a widespread in the parcel industry. The following findings are a result of the descriptive analysis of the survey responses.

[1] The DGB Good Work Index was developed on the initiative of the German Trade Union Confederation (DGB) and is a standardized survey instrument to assess job quality in various dimensions. It is built on a job-demand-job-resource model.

Key findings

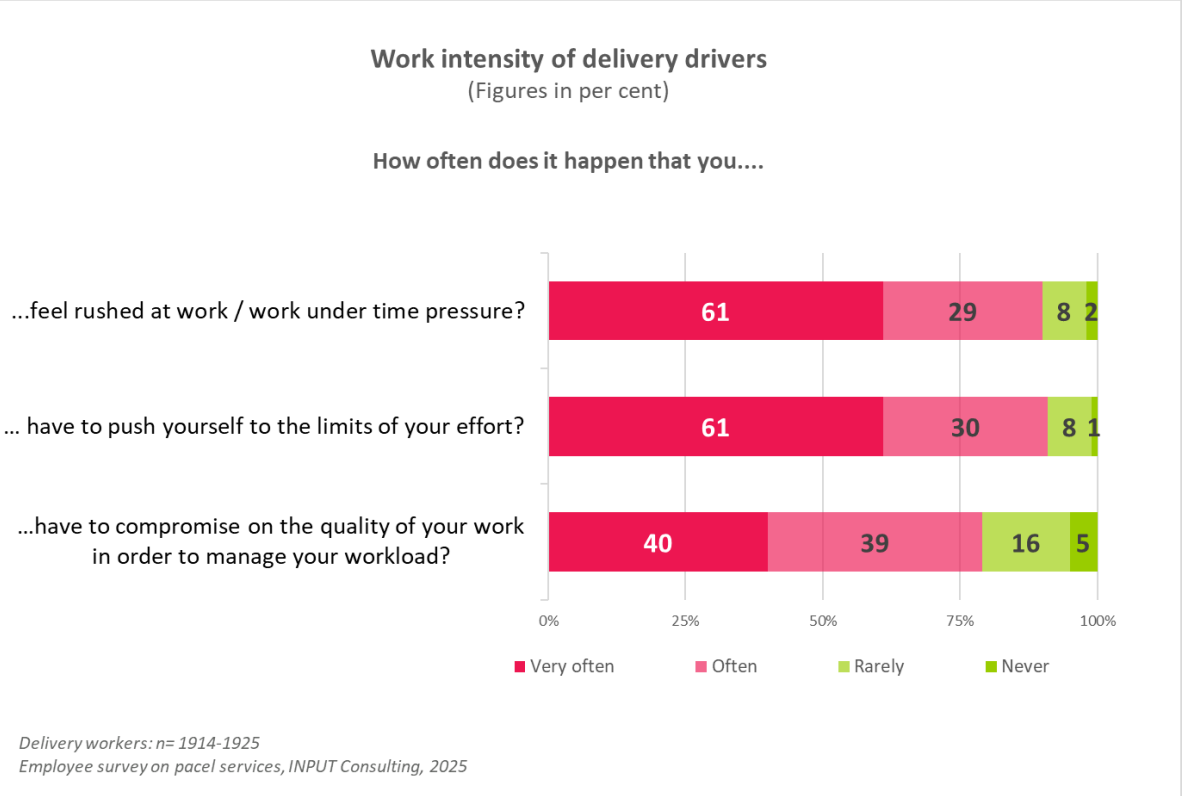
Overall assessment of job quality: The DGB Good Work Index for the parcel delivery industry stands at 40 out of 100 points, which puts it in the 'poor quality work' category (<50 index points) and well below the overall economic average in Germany of 65 points. The index values are particularly low for physical demands, work intensity, income and employment security.



Employee survey of parcel services, INPUT Consulting, 2025

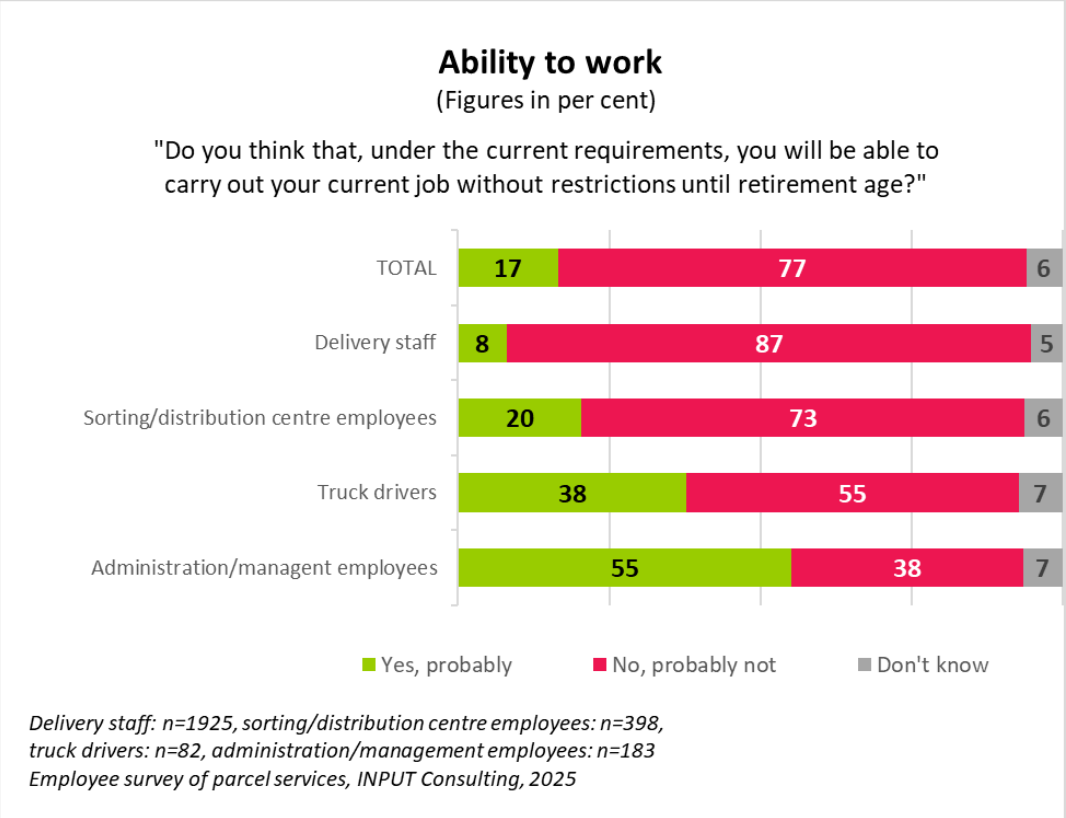
Occupation-specific differences: Administrative and management personnel at parcel companies have a better quality of work (index value 50 out of 100), while delivery workers rate their quality of work as poorer, with a score of 34 out of 100. Physical strain and work intensity are particularly high in manual labour-dominated occupations, while mental strain due to work interruptions tends to dominate in white collar occupations.

High physical strain, work intensification and lack of resources among delivery workers: 93 per cent of delivery workers say they often or very often do physically demanding work, which is perceived as very stressful. 90 per cent of delivery workers often or very often feel rushed or under time pressure, which leads to exhaustion and a decline in quality of their work. The amount of work has increased significantly in recent years, mainly due to the demands of online retail. Respondents have little influence on their workload or working hours and receive little social support or appreciation. Despite these demanding conditions, many employees identify strongly with their work and assess it as socially meaningful.



Delivery workers: n= 1914-1925
Employee survey on pacel services, INPUT Consulting, 2025

Health consequences and ability to work: Only 17 percent of respondents estimate that they will be able to continue working until retirement age. Among delivery drivers, the share is only 8 percent. This finding is highly consistent with health insurance statistics on increased sick days and absenteeism, particularly musculoskeletal disorders in occupations in the parcel delivery industry.

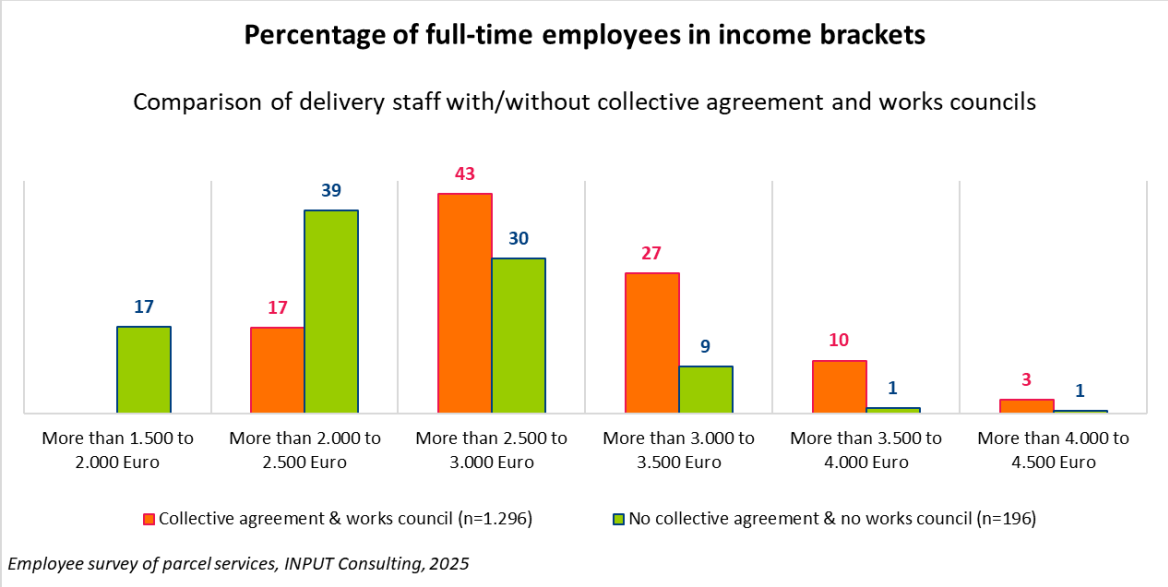


Delivery staff: n=1925, sorting/distribution centre employees: n=398, truck drivers: n=82, administration/management employees: n=183
Employee survey of parcel services, INPUT Consulting, 2025

Income and retirement provisions in the assessment of employees: A large proportion of employees consider their income to be inadequate and insufficient. The expected pension is often below the poverty risk threshold, which leads to great concern about financial security in old age. Over 90 per cent attach great importance to income and retirement provisions.

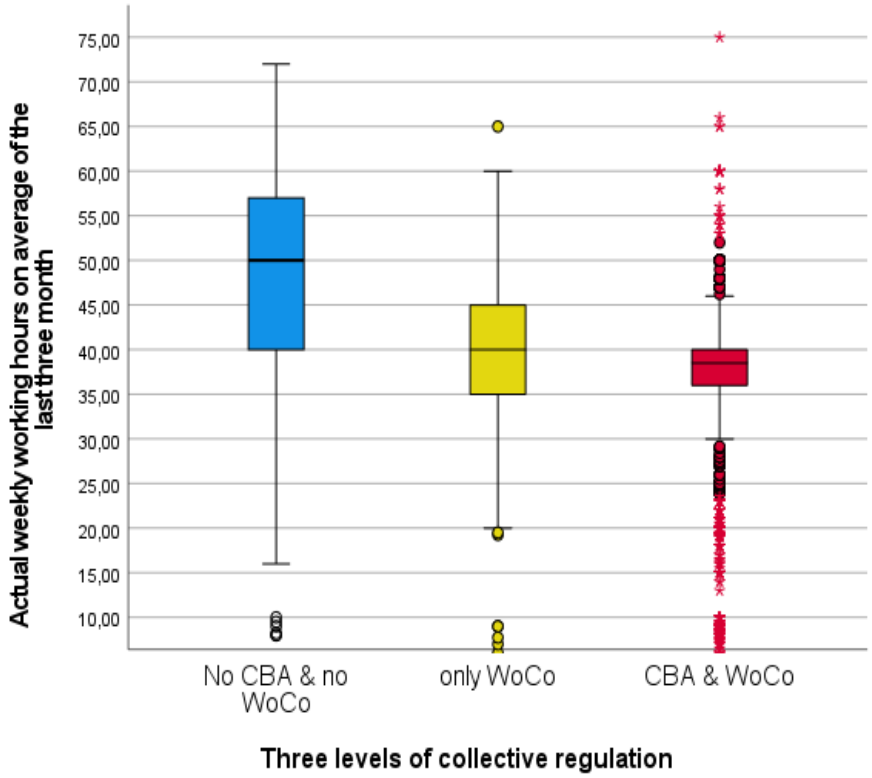
Income level: A relative majority of respondents earn a gross salary between €2,500 and €3,000 (38 per cent of delivery workers, 34 per cent of sorting workers). The remainder are roughly equally divided between those earning above and below this amount. Ten percent earn less than €2,000 per month, which is below the minimum wage for a full-time position (€2,222 for a 40-hour week). Around 30 percent of delivery workers and sorting staff receive a low wage, i.e. less than €2,408 gross per month.

Income differences due to collective bargaining agreements: There are systematic income differences between employees in companies with and without collective bargaining agreements (CBA). For example, delivery drivers covered by CBAs are consistently represented to a bigger share in the higher income brackets. While the relative majority of 43 per cent of this group is in the income bracket between €2,500 and €3,000, the relative majority of employees not covered by CBAs and without co-determination rights (39 per cent) is situated in the income bracket between €2,000 and €2,500. As a result, delivery drivers in companies bound by CBAs and with co-determination earn on average around €500 more than their colleagues in companies without such collective regulations.



Normal working time patterns for employees covered by collective agreements: CBAs provide effective protection against excessively long working days. The actual median weekly working time for CBA covered employees is 38.5 hours. Due to their high representation in the sample, this is also the median weekly working time across all employees.

Excessive daily and weekly working hours for employees without a collective bargaining agreement and works council (WoCo): There is a significant difference in weekly working hours between employees with and without a collective agreement and works council respectively. While both groups have a median contractual weekly working time of 38.5 to 40 hours, the group without a CBA and without WoCo effectively works a median of 50 hours per week. That is 11.5 hours more than their colleagues covered by a CBA. Some employees are burdened by excessive working hours that exceed the legal daily and weekly limit. As subcontracted workers are only to a very small fraction covered by CBAs, excessive and illegal working time patterns affect this employee group in particular.



More unpaid work for employees without collective regulation: 52 per cent of employees lacking a works council and CBA often or very often work unpaid overtime. Among employees covered by CBAs and co-determination, the share is only 25 per cent.

Typical origins of migrant employees in the parcel delivery industry: The survey shows that a majority of employees with of migrant origin come from third countries in the Global South or the eastern periphery of the EU. They work disproportionately often in subcontracting companies and less frequently in the traditional large parcel companies.

Foreign parcel workers have a lower job quality than their German colleagues, as measured by the DBG index: In particular, the sub-index on job security and income situation is significantly worse than that of employees with German citizenship. This finding is likely to be related to the high proportion of 76 per cent of foreign employees among subcontractor companies.

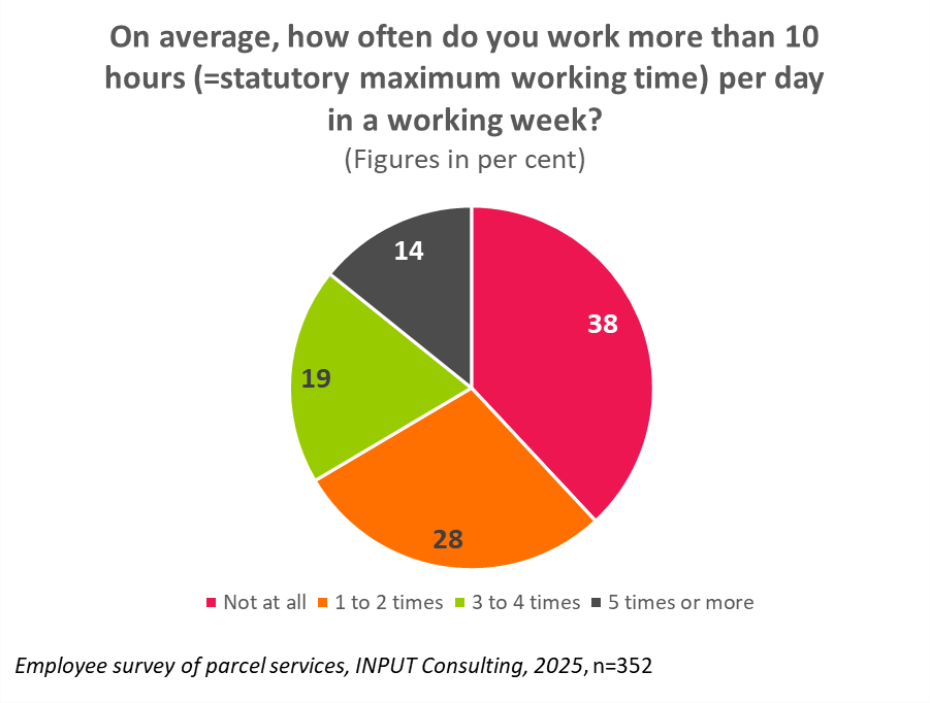
Labour law and violations: A subgroup of the sample was asked about labour law violations. Employees of subcontractors, temporary workers and those on service contracts were asked about nine dimensions relating to the application of individual labour rights. We formed this subgroup due to their increased economic and social vulnerability that results in a higher probability of being exposed to labour law violations.

Limited application of labour law: The evaluation of the survey supports the finding that labour law is only applied to a limited extent to the outsourced employee groups in the parcel delivery industry. The responses of the subgroup indicate that violations of their labour rights occur on a regular basis for the vast majority of 81 per cent. Furthermore, it can be documented that foreign employees are more affected by labour law violations than employees with German citizenship.

Frequent working time and wage-related violations of labour standards: The results of this survey show that the standards for maximum daily working hours are frequently exceeded. 61

per cent of the subgroup surveyed work more than 10 hours at least once a week. Furthermore, companies often appropriate unpaid labour time in the subgroup, via either completely or only partially compensating for overtime hours. This affects 65 per cent of employees (lacking overtime compensation). In addition, a majority of those surveyed (53 per cent) are concerned about arbitrary wage deductions in the event of misconduct, lacking performance and accidents.

Employee survey of parcel services, INPUT Consulting, 2025, n=351-352



Employee survey of parcel services, INPUT Consulting, 2025, n=352

Download of the study: https://www.input-consulting.de/publikationen/publikation/gute-arbeit-bei-paketdiensten-2025.html