

# GREEN TRANSITION IN POSTAL AND DELIVERY

Room for new business models and  
the role of different stakeholders

Copenhagen Economics postal and delivery conference  
May 11<sup>th</sup>, 2021

# The postal value chain

A framework to tackle the challenges

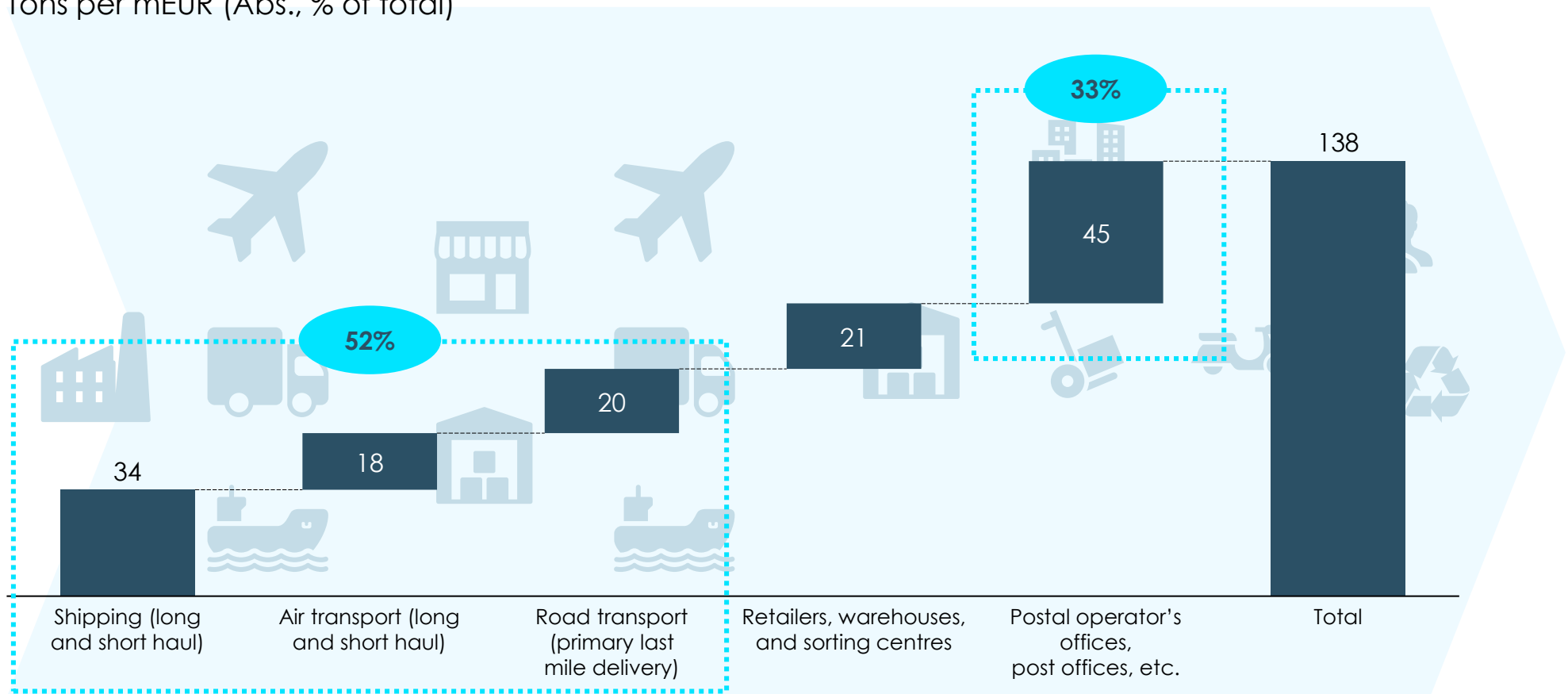


# The challenge

## 85% of emissions stem from transport & buildings

### Distribution of carbon emissions for leading Nordic postal operators




Tons per mEUR (Abs., % of total)



Source: Copenhagen Economics EEIO-model based on Danish Statistical Office Input- / Output-data data and CO2-multiplicatos

# Technical solutions and barriers

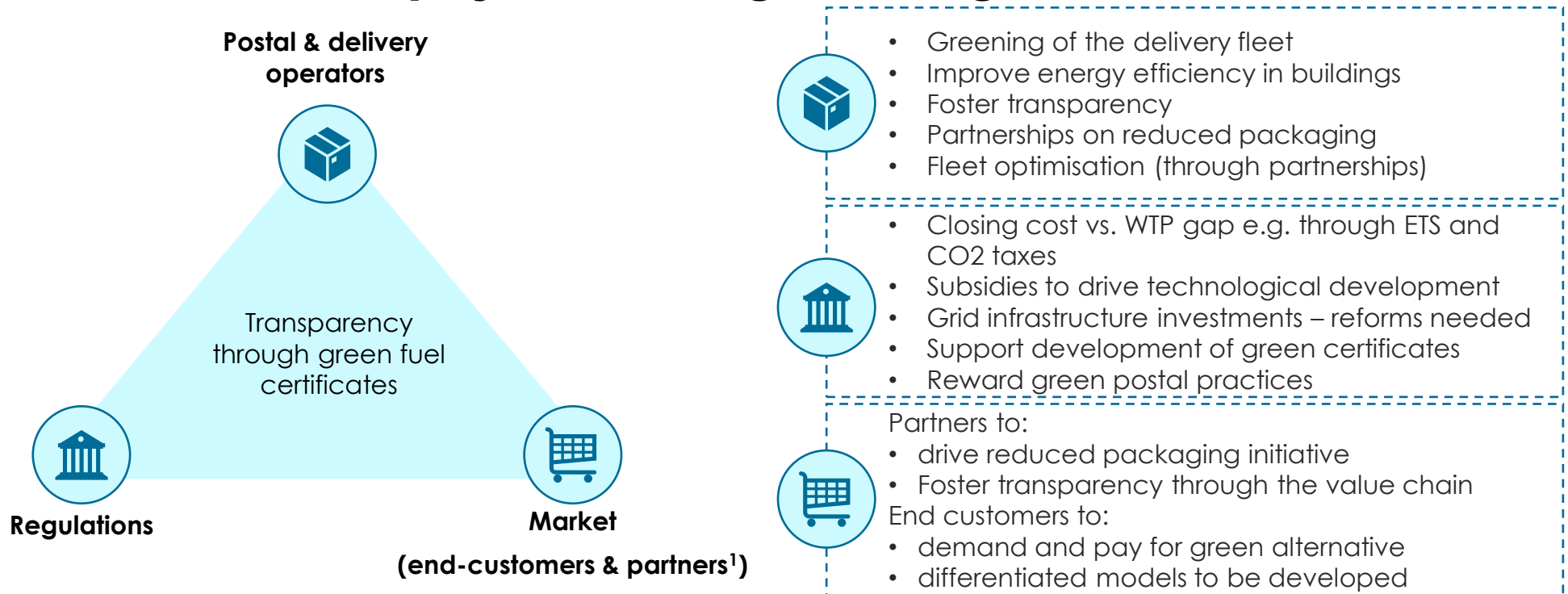
Solutions exist, barriers should be addressed

Solutions	Potential	Timeline	Barriers
 <b>Energy efficiency in buildings</b>	33% of total emissions in for leading Nordic postal operators	Now	<ul style="list-style-type: none"><li>• Few barriers for economically viable renovations</li></ul>
 <b>Optimisation &amp; operational efficiency</b>	E.g. around 30% air in parcels Reduction in number of vehicles causing lower emissions and cost savings	Short- to medium-term	<ul style="list-style-type: none"><li>• Partner engagement and readiness to accept alternative packaging</li><li>• Cross-industry partnerships around route optimisation, space utilisation</li></ul>
 <b>New fuels</b>	52% of total emissions for leading Nordic postal operators	Scaling up starting 2025-2030	<ul style="list-style-type: none"><li>• High costs of developed technologies linked to current limited scale</li><li>• Willingness-to-pay [WTP] in the market</li><li>• Technological advancements (especially for heavy vehicles, aviation)</li><li>• Insufficient charging infrastructure</li></ul>

# A green transition for the sector

## Broad involvement and transparency needed

### Three fundamental players in driving the change



### Core questions

- **A gradual transition needed: pressure to change how fast can you go?**
- **Where is the willingness-to-pay in the value chain?**
- **Which changes should be driven by regulators and by the market?**
- **How do these economic actors interact around driving the green transition?**

<sup>1</sup>) Business partners e.g., e-commerce businesses

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