

# Copenhagen Postal Conference 2022

By Peter Kjær Jensen, CEO PostNord Denmark

- Transformation in the Postal Industry
- Strategic Assets
- The role of policy makers
- Competitive landscape changes
  - opportunity / Threat?

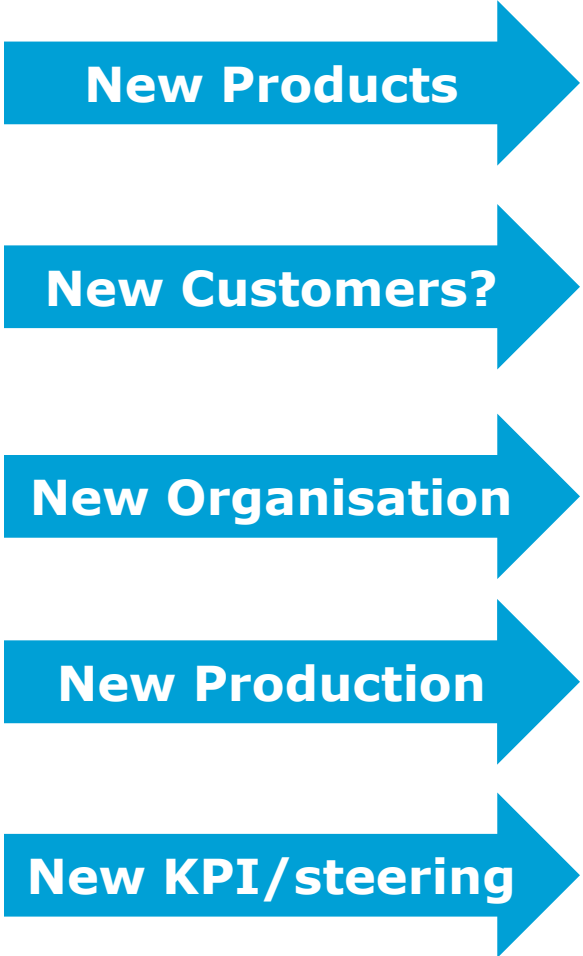


# Transforming a postal company

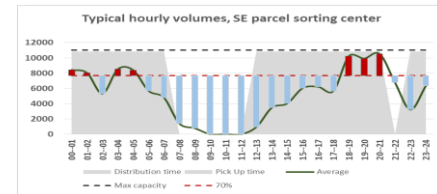
- “change” and “transformation” are very different

From.. 

*Traditional Postal Co. Holding USO and semi-monopoly – Profitable & with plenty of letters...*



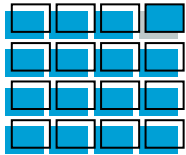
USO?



# Assets & Infrastructure

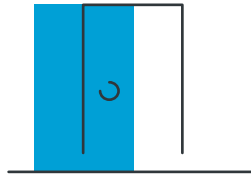
## - When to compete & when to cooperate?

### Key assets managed by Postal Operators (& Others)



#### Parcel locker

- Significant investment in hard assets
- Significant investment in technology
- Opportunity to open or close the networks



#### Home

- Box @ Home solution (open/closed)
- Geographic Coverage (downstream access?)



#### Service point

- Complete nationwide service point network
- Service points – potentially pulling control in-house

Technology incl. Master Data / Consumer preferences – “owned or shared”

# Policy Makers

- What is their role? How can they add value?

## Evening the Playing Ground

- Organized vs. Gig
- Tax-paying vs. Platforms
- Sustainable vs. Greenwashing

## Infrastructure Enablers

- Open/Closed networks
- Centrally managed master data



# The competitive landscape is changing fast

- and will be a part of transforming societies
- but this comes with a responsibility

## Parcel industry characteristics

## Increasing Competitive Pressure

## Changing regulatory landscape

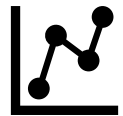


Cost leadership via flexibility, productivity & low overhead

Payment providers and TA system providers want to own the consumer



VAT legislation impacting import



Capacity variability need

Platform players expanding into logistics



Sustainability & Climate regulation



Relatively commoditized product by channel

Tech companies with logistics capabilities enter last mile



Licensing to operate Parcel locker networks in Oslo, other cities to follow?



Increasing digitalization & automation

Niche log tech players focus on attractive pockets in the market



### Automation and innovation

Self service automated end points is becoming more common



High degree of innovation and pace of change

Fulfilment operators build complete offering including last mile



Home delivery convenience increasing and expected to be in line with LogTech



Next big thing?

Next big thing?

**Thank you for your time!**