



## 10TH ANNUAL COPENHAGEN ECONOMICS **POSTAL & DELIVERY CONFERENCE 2024**

**Executive viewpoints on business and policy transformation**

### **Viewpoints on business and policy transformation**

1. What postal market?
2. What are the impacts beyond GDP?
3. Why there is a need a holistic and balanced approach?
4. What way forward?

**PostEurop<sup>•</sup>**



# 1. What postal market?





## 2. What are the impacts beyond GDP?

### ECONOMIC

Postal operators play an **essential role** in the single market by promoting economic growth, social cohesion and inclusion as well as enhancing rural areas development, keeping all territories connected.



Connecting

**800 million**

people and businesses daily.



**>60 billion**

items handled per years.



**258 million**

delivery points.



**55 postal operators**

**= 1%**

of their national **GDPs**.

represented by PostEurop.

### SOCIAL<sup>2</sup>

The postal sector is a **people-led and labour-intensive industry**, with around **2 million workers** across all **55 operators** members of PostEurop.

 **1,1 million**

workers in **25 European operators**.



Employment has remained relatively **stable** between 2018-2020.



**>60%** of workforce dedicated to **Delivery**.



**~50%** of employees are **women**.



The **average age** of employees is **45 years**.

And **40%** are **over 50 years old**.

### ENVIRONMENTAL

 **Fleet decarbonisation**

**58,000**  
vehicles powered  
with alternative fuels.

>

of which  
**30,000**  
electric vehicles.

**170,000**  
postal employees  
delivering on foot.

**100,000**  
delivering by bike or e-bike

 **Energy efficiency**

**77%**  
of energy used by postal  
operators comes from  
renewable sources.

**60%**  
of postal operators produce  
renewable energy for self-  
consumption  
(i.e. solar panels in buildings).

 **Circular economy**    **Zero-waste strategies**

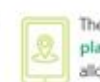


These principles apply to

- Packaging
- Paper
- Plastics
- Vehicles
- Batteries
- Electrical equipment

 **Sustainable products**

 **Increased number of parcel lockers:**  
**30%** between 2018-2020.



The use of technology to optimise route planning and pooling rate of vehicles allows to reduce the number of kilometers travelled.

## 2. What are the impacts beyond GDP?

In the hypothetical case of the **complete absence of postal infrastructure** from designated operators, for **EU countries** there would be a median reduction of

**9,3%**

HANDLE WITH CARE

in a **country's annual GDP**.

This figure dramatically eclipses the traditionally cited **direct contributions** of postal services to **GDP**, which range from **0.5% to 1.0%.\***

### 3. Why do we need a holistic and balanced approach?





## 4. What way forward?

Within an extremely **challenging, uncertain** and **diverse** context for the postal sector and an increasing **regulatory pressure...there is no need for a green field approach**

- Proposing **extend the scope of the Directive** to include e-commerce parcel delivery service providers **is premature**
- Encouraging **good working conditions, is essential** but...there are specific **regulations in place** and there is a need to **look at the whole logistic supply chain**
- Promoting measures to ensure the **environmental sustainability** of the postal sector, is **also key** but...there are already **many measures that guarantee postal operators green transition** (Fit for 55 package, Smart Mobility Strategy...).
- If assessing the **Universal Service Obligation**, it should be considered:
  - The need to ensure the provision of **services that are relevant for citizens and the economy.**
  - The **long-term economic viability** of universal service operators in each Member State must be guaranteed

**One size does not fit all...so subsidiarity will be crucial**