

# Market Flash

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## De Post/La Post to Change its Name



De Post/La Poste of Belgium is signalling its transformation and readiness for a fully liberalised market by changing its name to "bpost" under a new corporate identity.

A modernised logo will be rolled out gradually from September at more than 1,000 locations, on more than 6,000 vehicles and on post boxes and uniforms.

Bpost will provide a single name designed to differentiate the company internationally while retaining its postal identity and relevance to its home market.

"This is the culmination of a raft of change projects rolled out over the past decade," said Inge Vervotte, Belgium's minister for the civil service and public companies. "All postal employees have worked hard to prepare their company for the future. With the new name and modernised logo they are fully focused on going forward."

Subsidiaries Speos and Certipost will keep their names but their logos will be adapted. The Taxipost brand is also being maintained.

Belgian Post International will become bpost international, while bpost business will provide business services. A decision is yet to be made on whether to alter the name of the banking joint venture, Bank van De Post/Banque de La Poste.

Immediately prior to De Post/La Poste's announcement of its planned name change, its chief executive, Johnny Thijs, was announced winner of the Industry Leadership Award at the 11<sup>th</sup> World Mail Awards in Copenhagen for his outstanding contribution to the express and mail sector.

Accepting the award, Mr. Thijs said: "Together as a team, we have transformed our company, improving the quality of our services, bringing in a culture of customer orientation and increasing the efficiency of our processes. De Post/La Poste is now ready for the full market liberalisation in 2011."

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## Europe

### Itella Cuts Rates while Awaiting Court Ruling

Itella is reducing its letter postage rates against its better judgement as its dispute with the Finnish regulator, FICORA, continues to be processed in the administrative court.

From August 1 "until further notice," first class letter stamps will cost EUR 0.75 instead of the current EUR 0.80, and Christmas card stamps will be reduced to EUR 0.55 from EUR 0.60.

Itella said it was making the rate change "to eliminate consumer confusion and settle the situation for the time being".

FICORA required the reductions, but Itella objected to the way the regulator interpreted the Postal Services Act in its allocation of common network costs to different products. Itella is seeking a ruling from the administrative court on how network costs should be allocated.

"We still don't consider the price change as sensible with regard to the Finnish postal operations as a whole," said Kari Kivikoski, director of mail communication. "Economic prerequisites for the price reductions simply do not exist."

Between January and May this year, the volume of addressed mail delivered by Itella dropped by three percent compared with the same period last year. The volume of letters, magazines, addressed direct mail and parcels has been declining for more than 18 months, decreasing by about 200 million items a year.

"Unit costs are rising because the universal service obligation creates costs that cannot be easily adjusted according to delivery volumes," said Ms. Kivikoski.

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## Correios Cuts Letter Rates for Business

CTT-Correios of Portugal has reduced the price of domestic, first class letters up to 20 grams for business customers.

On June 1, the rate for Term Contracts, franked mail and pre-franked envelopes dropped by one euro cent to EUR 0.46. At the same time, the price of ordinary mail in term contracts reduced from EUR 0.315 to EUR 0.305.

The company also reduced prices for bulk dispatches or ordinary mail up to 50 grams in term contracts, sent by dispatch centres.

## Norway Post Brands Align to its Structure

Norway Post has aligned its brands to a new group organisational structure that brings mail production and distribution together into a single division operating across six regions.

"The combined mail division paves the way for greater cost efficiency and profitability in the mail segment. The merger is also intended to lead to greater customer focus and allow us to adapt quickly to changes in customer needs," said Dag Mejdell, chief executive of Norway Post.

Two logistics divisions, Logistics, covering parcels and goods, and Logistics Solutions, will raise the profile of logistics within the organisation, bringing it closer to group management. The aim is to achieve further integration among goods, parcels and transport operations.

Norway Post has adapted its brand architecture to the new organisation.

Bring is the brand targeted at business customers. There will be no name changes to specialist Bring units, such as Bring Dialog, within the mail division, but Bring Logistics will in future comprise three specialist units: Bring Cargo, Bring Parcels and Bring Warehousing.

Bring SCM will become Bring Supply Services and Bring Frigoscandia will be Bring Frigo.

Posten, the consumer brand, will continue to cover group operations, the post office network and daily mail delivery.





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## CVC Rumoured to Be in Talks with TNT

The Dutch press has reported that British private equity group CVC is in talks with TNT over the purchase of a major stake in TNT Post.

In April, TNT announced it would split off TNT Post internally and review possible partnerships or an initial public offering.

There is speculation in the Netherlands that CVC could be interested in a EUR 1.5 billion stake in the company, estimated to be worth EUR 3 billion to EUR 4 billion. CVC already has a 50 percent stake in De Post/La Poste of Belgium.

A TNT spokesman said that the company does not respond to "market rumours" and is currently busy preparing the internal separation of the mail business. CVC declined to comment.

## UK Minister Hints at Full Privatisation

The United Kingdom's new postal affairs minister, Ed Davey, has told the Daily Telegraph newspaper "all options are open" for Royal Mail, including a flotation.

The Daily Telegraph estimated that the government could raise EUR 9 billion (according to a December 2008 valuation) if 100 percent of Royal Mail shares were sold.

In the Queen's Speech at the opening of parliament last month, the new British Conservative-Liberal government referred to "an injection of private capital," which was taken to mean selling off up to 49 percent.

## Speculation on Deutsche Post Savings Plan

The German press is speculating on the level of savings that Deutsche Post DHL will target in its next cost reduction programme for the mail and parcels business. Estimates have ranged from "several hundred million Euros" to EUR 1 billion.

Jürgen Gerdes, head of mail and parcels, is reported to have launched "Project One" to the mail unit. The company expects to gain from selling its 350 company-run postal outlets and is said to be considering joint deliveries of mail and parcels in more areas.



## NetPosti Penetrates Further in Finland

Itella's secure electronic mail service, NetPosti, has signed cooperation agreements with online payment operator Suomen Verkkomaksut Oy and with I-Mediat, a media company in the Ostrobothnian region of Finland.

The NetPosti "invoice button" will be available on most Finnish e-commerce sites through the deal with Suomen Verkkomaksut. This will give customers the option to receive the invoice for their purchases directly into the NetPosti service.

Consumers can pay an e-invoice received in NetPosti by logging on to their online bank. "Paying for online purchases with an e-invoice delivered to a NetPosti mailbox is a safe way to shop online. Moreover, online purchases will be documented in the user's personal NetPosti archive," said Pasi Ketonen, business development director of NetPosti.

Separately, media company I-Mediat has made NetPosti an integral part of online services provided by two newspapers, Ilkka and Pohjalainen in a project to develop an online community for the Ostrobothnian region of Finland.

"NetPosti will give our customers the opportunity to manage almost all of their household tasks from payslips to bills," said Marko Orpana, director of I-Mediat online and mobile business.

## Swiss Post Digitises Insurance Documents

Swiss Post Solutions is working on a digitisation project for accident insurance company Suva. The aim is to scan all correspondence received by Suva agencies, classify them quickly and allocate them to electronic dossiers in order to boost case management efficiency.

Suva, the largest provider in Switzerland of compulsory accident insurance, is subject to the requirements of the federal electronic business management programme, GEVER, which requires digitisation and electronic archiving of business-related documents by the end of 2011.

Swiss Post Solutions provides digital document management services while Swiss Post is the issuer of Switzerland's standard digital identity and signature, SwissID.

## Customer Support for E-Postbrief

Deutsche Post is due to launch its secure internet letter, E-Postbrief, in mid July and has opened a call centre to support customer queries about handling and registration for the new service.

"E-Postbrief will have a strong infrastructure with safe and user-friendly technology as well as direct and competent customer service across all channels," said Deutsche Post mail and parcels chief Jürgen Gerdes.

The paid-for E-Postbrief service signed up its first customers in March.



## Austrian Post Takes 100% of EBPP

Austrian Post has taken over the 60 percent stake in electronic billing provider EBPP, formerly held by its joint venture partner Raiffeisen Informatik, in order to own the subsidiary outright.

EBPP delivers documents with digital signatures electronically either by email or to customer mailboxes at their bank portal. Austrian Post said it would extend these services by adding its hybrid service, meinbrief.at to the range.

## Royal Mail Enhances Address Data Delivery

Royal Mail's Address Management Unit (AMU) is developing new ways to provide raw address data to customers and licensed solutions providers.

It has appointed AFD Software to help enhance and distribute the Postcode Address File (PAF) and its address management products.

There will be two options for receiving data: via an enhanced CD or a new FTP service providing instant access.

Customers will receive an email informing them their data is ready for download or that their CD has been dispatched. CD customers will also be able to track their product using a new online system.

## DHL to Run Supply Chain for Smart Meters

DHL Supply Chain has won a contract worth GBP 17 million over five years to operate a national supply chain for the roll-out of smart domestic gas meters in the United Kingdom.

The contract, with British Gas, involves delivering the new meters to every home in the UK to facilitate installation and maintenance.

DHL will use a regional network to manage the transfer of meters and associated materials from the British Gas warehouse to DHL's national network of collection points. It will integrate with British Gas systems to provide real time track and trace for meters at serial number level.



## Royal Mail Tools Enrich Unaddressed Mail

Royal Mail has launched Customer Finder, an online tool that helps marketers take a more intelligent approach to unaddressed mail campaigns.

Customer Finder can help users choose targets, build maps and reports and define granular search criteria. It is one of Royal Mail Door to Door's precision targeting solutions that enable marketers to identify potential customers more effectively.

Royal Mail said targeting could focus on potential customers within a specific distance of a company. It can also support national and regional television or radio advertising with leaflet drops delivered to residents in the areas covered by the broadcast.



## DPD Expands Delivery Alert Service

DPD is expanding its consumer advance notification service for home deliveries following successful trials in the United Kingdom over the past six months.

DPD Predict tells consumers in advance of the one-hour period in which their parcel will be delivered. Once DPD has completed early morning sorting and delivery round planning, it sends an SMS or email informing recipients of their 60-minute delivery period.

Customers have the option to fix a time for a new delivery via an online tool if they cannot be at home during the delivery hour.

John Acton, executive vice president of GeoPost and joint chief executive of DPD Germany, told the World Mail & Express Europe conference in Copenhagen: "We will roll this service out in other European countries, but the time windows could be two or three hours depending on local needs."

## Parcelforce Gains B2B Contract

Royal Mail parcels subsidiary Parcelforce Worldwide has won a two-year contract to operate as the domestic carrier in the UK for RS Components.

It gained the business from the previous holder, DHL Express, following a call for tenders. "This contract win underlines Parcelforce Worldwide's commitment to be the business-to-business carrier of choice in the UK," said Nick Landon, sales and marketing director.

RS Components distributes electronic and maintenance products worldwide for 1.5 million customers.

## Satellite Tracking for Russian Mail Trucks

Russian Post is installing satellite tracking equipment in its 10,000 mail delivery vehicles under an agreement with the national network operator, Nis-Glonass.

It will have real-time vehicle tracking and expects to reduce operating costs by 20 percent, keeping better delivery times, saving fuel and reducing amortisation expenses.

The system will provide information about the duration and location of downtime, fuel usage and adherence to routing schedules.



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### Transport within Temperature Margins

German express operator trans-o-flex has a new service for goods that must be transported at temperatures between 2 and 8 °C and 15 and 25 °C.

The service, operated under the trans-o-flex ThermoMed brand, was commissioned initially by pharmaceutical company MEDICE, which no longer needs to use expensive thermo boxes when shipping goods.

### GLS Creates Delivery Matrix with Pick&Ship

Parcels operator GLS Denmark has expanded its product range for business-to-business customers with Pick&Ship.

This allows customers to book a collection online at any business address. Therefore, an individual in one location can order a collection from another location for delivery to a third.



## >>In Brief - Europe

### GLS Opens New German Depot

Parcels operator GLS has opened its EUR 13 million depot in Bornheim, north-west Germany, in order to expand capacity and boost growth in the region.

### Postal Strikes Hit Europe

Postal operations in Denmark, Spain and Portugal were hit by strikes in early June in protest against restructuring and reform plans and lack of progress in pay talks.

### DHL Transports German Language Materials

DHL Express is supporting the "German – Language of Ideas" initiative by transporting two chests of campaign material to German embassies and consulates which are raising awareness of the German language and culture. The international initiative is run by Germany's Federal Foreign Office.

### The Road to Damascus Opens

TNT Express has expanded its Middle East Road Network to Damascus, Syria, to operate departures to Damascus twice a week on a six-day, door-to-door delivery service using secure and tracked vehicles.

### Romania's TCE Logistica Fails

Romanian courier company TCE Logistica has started insolvency proceedings after accumulating debts of EUR 8.5 million. This is the second company in the RTC group to become insolvent after Diverta's failure two weeks ago, according to media reports.

### DPD Ukraine Adds 16 More Terminals

DPD Ukraine plans to increase the number of its terminals in the country from the current 34 to 50 by the end of this year to expand further its operational network. The new terminals are due to be accompanied by additional warehouses and product distribution points in cities with DPD branches.

### Hermes Extends German HQ

Hermes has completed a EUR 18 million extension to its head office in Hamburg. The new 8,750 sq metre facility offers work space for 350 employees.

### UPS Romania Opens a Multi-Function Centre

UPS Romania has officially opened a logistics facility at Bucharest's Otopeni Airport that functions as a combined air gateway, regional centre and freight office. The facility also operates package sorting and provides storage space.



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## Americas

### Canada Post Expands Retail Range

Canada Post has announced two initiatives to boost revenue and footfall at its 6,500 post offices across the country.

From November, Canadians will be able to reset or change their personal identification numbers (PINs) at most post offices. Financial institutions with no physical outlet will be able to provide a means for customers to manage their PIN information.

"Adding PIN services to our retail network provides chip card-holders with a secure, convenient location to personalise their PIN number ensuring uninterrupted card use," said Mary Traversy, senior vice president of transaction mail.

The second initiative is to provide consumers with greater access to wireless products by offering wireless phones and services at post offices.

Canada Post plans to complement its range of pre-paid services by offering cellular handsets and contracts. In the future it envisages operating phone deactivation, recycling and bill payment.

The corporation would like to form a partnership with one or more wireless service providers. It is using a Request for Partnership process to identify potential mobility partners and determine the best strategy.

### Pharmacies Get Added Value Shipping

DHL Global Mail has launched a shipping service for mail order pharmacies in the United States offering a wide range of routing options and "service levels that surpass current industry norms".

The service, DHL Smart Mail Pharma Select, is supported by a web portal that allows customers to track shipments, set up email notifications for their customers and create internal reports to manage information. DHL Global Mail also provides reship management assistance and monthly dashboard performance overviews.

"We developed DHL Smart Mail Pharma Select to help mail order pharmacies control costs while maintaining excellent customer service and providing increased accountability," said David Loonam, vice president of domestic product management and marketing.



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## FedEx Looks Forward to Better Times Ahead

FedEx Corp has reported fourth quarter and full year consolidated results, ending the fiscal year a stronger company well positioned for future revenue and earnings growth, according to Frederick W. Smith, chairman, president and chief executive.

In the full year, revenue was two percent down at USD 34.7 billion while operating income rose to USD 2 billion from last year's USD 747 million. Net income was USD 1.18 billion compared with USD 98 million last year.

The company delivered strong results in its fourth quarter thanks to growth in package volume and leverage of its global networks to take advantage of a recovering economy.

Revenue in the quarter was up 20 percent on the same period last year at USD 9.43 billion while operating income was USD 696 million compared with an operating loss of USD 849 million. Net income was USD 419 million against a fourth quarter loss last year of USD 876 million.

In the fourth quarter, all three main operating divisions, express, ground and freight, increased their year-on-year revenue considerably.

Express moved from an operating loss to a profit of USD 413 million, while ground increased its operating income by 57 percent to USD 319 million. Freight reduced its loss to USD 36 million compared with a loss of USD 106 million.

"We expect continued improvement in both revenue and earnings in fiscal 2011," said Alan B. Graf Jr., FedEx Corp executive vice president and chief financial officer. "Resumed growth in industrial production and global trade is increasing demand for our transportation services, and yield management remains a top priority across all of our operating companies. However, we expect the growth in earnings in fiscal 2011 to be constrained by significant increases in fixed pension and volume-related aircraft maintenance expenses, along with higher anticipated healthcare costs. In addition, our earnings guidance includes increased costs related to the planned reinstatement of various employee compensation programmes."

The capital spending forecast for fiscal 2011 is USD 3.2 billion, including the expected delivery of six Boeing 777F and 16 Boeing 757 aircraft.





## FedEx Voted Best for Customers and Staff

FedEx has been voted top for customer satisfaction and “the best place to work in IT” in two separate surveys.

The company was ranked first in the express delivery industry for customer satisfaction in the University of Michigan’s American Customer Satisfaction Index (ACSI) in June 2010, the 13<sup>th</sup> consecutive year that FedEx has captured the number one position.

Computerworld Magazine named FedEx “Best Place to Work in IT,” citing its training programmes as encouraging innovation and personal development.

## Healthcare Execs Focus on Supply Chain

Senior healthcare executives in the United States cite an escalation in complex regulations around the world as their greatest concern according to the UPS “Pain in the (Supply) Chain” survey.

For the third year in a row, cost management is top of the list of supply chain concerns with 64 percent of respondents expressing concern compared with 55 percent in 2009; 44 percent of companies reported success in addressing cost management.

## IATA Chairman to Push Forward on Cargo

The new chairman of the International Air Transport Association (IATA) board, FedEx Express president and chief executive Dave Bronczek, has started his one-year term with a pledge to push forward on cargo issues.

“IATA must play a role in laying the foundation for sustainable profitability. We must further reduce costs and improve efficiencies,” Mr. Bronczek said. “And we need to continue to lead the industry on climate change.”

IATA is predicting 18.5 percent growth in air cargo globally this year with yields improved by 4.5 percent.

North American air carriers are expected to return to a profit of USD 1.9 billion, a major reversal from the previously forecast USD 1.8 billion loss and the USD 2.7 billion loss sustained in 2009.



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## Asia-Pacific

### DHL Targets China's Apparel Trade



DHL plans to expand its offer to China's USD 7.5 billion fashion and apparel logistics industry.

It has developed its "Door-to-More" service, which consolidates multiple vendor shipments to a single shipment for international transport and local customs clearance. The consolidated shipment is then broken down into individual deliveries to multiple customers.

DHL says China is a key growth driver for the fashion and apparel industry in north Asia Pacific, with the region producing and exporting more than half of the world's fashion and apparel goods.

North Asia Pacific made up 66 percent of global airfreight export last year, while ocean freight constituted 54 percent of the global fashion and apparel export market.

China remains the world's largest textile and apparel exporter, but its domestic retail market is also growing rapidly, DHL said in a statement, with western-style retailers growing in bigger Chinese cities, supported by high-income customers.

"This increased retail footprint demands new supply chain models where distribution centres in China are needed," said Steve Huang, chief executive, China, DHL Global Forwarding. "Responding to the growing demand, we have expanded our warehousing and distribution network beyond first-tier cities, are penetrating deep into second and third-tier cities and will be investing to enhance our expertise and capabilities in the fast-moving industry."

### Hongkong Post Seeks E-Commerce Partners

Hongkong Post aims to become a key player in Asian e-commerce and is developing cooperation agreements with other postal operators for international business-to-consumer shipments, according to its new chief.

The postal operator is seeking additional parcel volume by setting up a Hong Kong-based e-shopping portal. It is working with Guangdong Post in mainland China on transportation of goods from the neighbouring Chinese province.

Other cooperation deals are in place with New Zealand Post and Thailand Post. "We are looking to work with other Asian Posts for a common e-commerce portal," said the new postmaster general, Clement Cheung.

He said Hongkong Post was working in the Kahala Post Group (KPG) with the United States Postal Service, Japan Post and other postal operators to provide an international delivery service better than EMS. There were "tremendous opportunities" for European postal operators to join up with Hongkong Post and help generate new business.

### Japanese Minister Resigns as Bill Delayed

The Japanese postal affairs minister Shizuka Kamei resigned on June 11 after prime minister Naoto Kan decided to delay the controversial bill to restructure Japan Post.

The ruling DPJ party decided not to extend the parliamentary session to gain time to pass the bill. The move effectively postponed the bill until after the upper house elections on July 11. Mr Kamei, who is head of the junior coalition party, resigned, taking responsibility for "the broken promise" to get the bill passed.

Mr. Kamei's departure prompted speculation that Mr. Kan might revise the postal services bill which has been a key project of Mr. Kamei.

The bill scales back earlier plans to privatise Japan Post and sell off the banking and insurance subsidiaries. It would also raise limits on deposits, which private banks fear would lead to a flow of capital to the state-owned organisation.

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### DHL a Five-Time Winner

DHL has won five awards at the Annual Asian Freight & Supply Chain Awards (AFSCA) 2010: Best Express Operator, Best Logistics Service Provider - Airfreight, Best Logistics Service Provider - Ocean Freight, Best Logistics Service Provider - Project Cargo and Best 3PL provider.

DHL Express secured the Best Express Operator award for the 23<sup>rd</sup> time since the launch of Asian Freight Industry Awards, the predecessor of the AFSCA, in 1987.

### FedEx a Three-Time Winner

FedEx Express picked up three awards at the Asian Freight & Supply Chain Awards (AFSCA) in Shanghai: Best All Cargo Airline, Best Air Cargo Carrier (North America) and Best Road Hauler (Asia).

### New Aerologic Links to Shanghai and Seoul

Aerologic, the joint venture cargo airline of DHL Express and Lufthansa Cargo, has expanded its intercontinental air network with new links to Shanghai and Seoul.

Initially, DHL Express will start operating two weekday flights on a Leipzig-Shanghai-Seoul routing while Lufthansa Cargo will operate a weekend flight from Frankfurt via Almaty, the largest city in Kazakhstan.

The parent companies plan to increase the frequency with the delivery of further aircraft throughout the year. In the upcoming months, Aerologic expects delivery of another three aircraft. By the end of 2010, the fleet will include eight leased B777Fs with the first four already delivered in 2009.

## >>In Brief - *Asia-Pacific*

#### TNT to Invest Further in Asian Road Network

TNT has announced a further EUR 4.5 million investment in its Asia Road Network to acquire a fleet of specially designed Scania vehicles to suit pan-Asian routes. The new fleet will include larger and more eco-friendly trailers than their predecessors.

#### Working Round the Clock for Tetra Pak

DHL Japan has signed a contract with Nihon Tetra Pak K.K., the Japanese business of the food processing and packaging company, to provide domestic delivery services in Japan, a security system and nonstop operation 24 hours a day, 365 days a year.

#### DHL Delivers Festival Films

DHL has been named the official courier for the Short Shorts Film Festival & Asia 2010 in Tokyo. It will be responsible for the international transportation of all 100 films screened during the festival.





## ABOUT THIS PUBLICATION

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