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Postal industry looks to the future with sharpened focus on innovation



The need for fresh thinking in the postal sector has never been greater, especially in driving innovation to meet the evolving demands of consumer and business customers. This was the main finding to emerge from the first annual 'Trends and Innovation in the Postal Market (TIP)' conference that took place 13-14 September in Lausanne, Switzerland. The high-level two-day conference saw leading players in the postal industry look to the future with a sharpened focus on driving innovation within the sector, and gathered some 100 delegates from the postal sector, industry and business, regulatory bodies and international organisations. Contributors included leading figures from Post operators, consultancies, academia, the European Commission and the UPU.

Working sessions of the conference covered topics from innovative pricing to the concept of 'open innovation', and how to manage such innovation across postal and logistics markets. The conference specifically addressed the major challenges facing the mail market, and examined how innovative solutions could be critical in addressing and overcoming these: key among these was the focus on the different types of e-services which Posts could look to developing for business and consumer customers alike. A further topic of discussion was the need for innovative thinking in the regulation of the postal sector, in view of declining mail volumes and the transformation of Posts' business models.

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IPC CEO and President Herbert-Michael Zapf reiterated the importance of innovation across the sector, including on the regulatory side. "Too often regulators have tended to a fixed-target approach to market liberalisation, which has meant reapportioning ever-smaller slices of an already-declining cake", he said, noting that while Posts would need to innovate to rework business models and develop new revenue streams to guarantee their long-term viability, "regulators that adopt innovative thinking to encourage smart rules that help increase the size of the cake for all market players will play a critical role in supporting the industry". Chair of Management of Network Industries (MIR) at EPFL Professor Dr. Matthias Finger commented that the conference marked "a new departure" in the postal sector, given the "need to ensure the industry remains focused on innovation in these tough times".

The TIP conference was jointly organised by the International Post Corporation (IPC) and the Ecole Polytechnique Fédérale de Lausanne (EPFL), and took place on the EPFL campus in Lausanne, Switzerland. To support the innovation drive within the postal industry, the annual IPC-EPFL TIP conference will allow delegates from within the postal industry and beyond can come to discuss progress and set priorities for the future.

A summary podcast of the conference is available to view at www.ipc.be.

**Europe****Parcel growth boosts La Poste result****GROUPE LA POSTE**

Growth in parcel and express volumes helped Groupe La Poste to achieve higher first half profits than in the same period in 2009. The company revised its full-year forecast upwards, saying it now expects profits at 2008 levels. Previously, La Poste predicted its full-year result would be close to lower 2009 levels.

Operating profit in the period January to June rose by 50 percent to €678m (an increase of 55 percent on a like-for-like basis). Operating margin improved from 4.4 percent in the first six months last year to 6.4 percent, a return to 2008 levels.

Net profit rose by 23 percent to €478m; that figure included a € 101m contribution from CNP Assurances.

Group revenue was up 3.1 percent to €10.59bn, an increase of 2.7 percent on an underlying basis. Mail division revenue was stable at €5.94bn, just 0.9 percent below the same period last year.

Lower mail revenue arising from a 3.7 percent drop in volume was offset in part by higher tariffs; extra working days in the first half; growth at Sofipost, the holding company for mail subsidiaries; and a 1.4 percent cost reduction. The division returned a stable operating profit of €240m and a slightly higher operating margin of four percent.

Demonstrating strong recovery, the express and parcel division increased its revenue by 6.2 percent to € 233bn; operating profit increased by five percent to €172m.

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French home delivery parcels operator ColiPoste increased volume by 2.4 percent. Revenue generated by e-commerce rose by twelve percent on the same period last year. ColiPoste increased its overall revenue by 3.4 percent to €697m.

GeoPost's French and European parcels subsidiaries benefited from increased trade and higher market shares. Overall volume increased by ten percent, but intense competition kept prices under pressure so that half-year revenue was up a lower 7.4 percent year-on-year at €1.63bn.

La Banque Postale saw its sales rise by 7.6 percent to €2.64bn generating an operating profit of €426m. Revenue from the post office network was stagnant at €1.28bn.

Separately, Groupe La Poste announced that it is entering exclusive negotiations with communications group SFR on the launch of mobile phone services under the La Poste brand. The aim is to develop both pre-pay and post-pay offers.

PostFinance biggest profit-maker half way

Swiss Post's six-month group profit was 35 percent up at CHF484m. PostFinance made the largest contribution of CHF274m thanks to an increase in customer deposits and higher net interest. The company warned that a too great dependence on the retail finance market was a risk, saying that the group result must remain broadly based.

Earnings before interest and tax (EBIT) increased by CHF 122m on the same period last year to CHF487m.

Overall operating income (sales) was CHF105m higher than the first six months of 2009 at CHF4.31bn. The result was boosted by efficiency gains from new letter sorting centres and cost reductions in the logistics division.

In the communications market, promotional mailings increased in volume compared with last year, but addressed letter volume continued to decline, ending the half year 2.6 percent below June 2009. A price reduction on 01 July 2009 and introduction of VAT both impacted negatively on mail revenue.

PostMail, the domestic service, achieved an EBIT of CHF 09m compared with CHF127m in the first half of 2009. Sales were CHF1.31bn.

Swiss Post International's EBIT was CHF217m on sales of CHF382m. Difficult operating conditions in some markets affected the result, which was CHF2m below the previous first half.

Swiss Post Solutions moved from a CHF10m loss to break-even owing mainly to cost reduction. The post office network made a loss of CHF57m, CHF10m less than the previous year.

The company said it expected to achieve the Federal Council's financial targets at full year but pointed out that the economic situation and volume trends remained uncertain.



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Posten Norden reports lower pre-tax profit

Posten Norden has reported half-year earnings before tax of SEK796m, SEK98m below the same period last year.

The group, formed out of the merger between Sweden's Posten AB and Post Danmark, did increase its operating earnings by 15 percent from SEK690m to SEK793m, owing mainly to capacity and cost adjustments and synergies achieved from the merger.

Net sales, excluding structural and currency changes, fell by two percent during the first six months to SEK21.15bn.

Group chief executive Lars G. Nordström said the Danish market continued to show sharp volume decline of more than ten percent and warned that cost reduction would not match that level.

In Sweden, economic recovery provided a boost to letter volume, but Mr. Nordström warned that the market would be characterised by sharp volume contractions in the future. Adjustments to capacity would continue.

Demand for logistics services rose in the first six months and, despite continuing intense competition, earnings increased (excluding structural and currency changes). Information logistics also showed a positive trend but had "some way to go" before achieving a profit.

Savings sought from Deutsche Post parcels

Employees in Deutsche Post's mail division are being urged to come up with cost saving ideas in view of falling profits.

The mail business includes domestic parcels which are delivered separately from letters in larger cities. The company has outsourced parcels delivery in about 800 of its 6,800 delivery areas after reaching agreement from unions for a transfer to service partners in about 1,000 districts by the end of 2011.

German newspaper *Frankfurter Allgemeine Zeitung* has claimed that Deutsche Post is considering doubling its

parcels outsourcing in 2012 once the current agreement with unions expires.

The newspaper stated that Deutsche Post could save up to €140m a year by extending its use of lower cost partners. A big impact on profitability arises from the difference in wages between postal workers earning more than €10 an hour and workers at competitors earning around €6.

A spokeswoman for Parcel Germany said there were no officially approved plans to increase outsourcing in the way described by *Frankfurter Allgemeine Zeitung*.

Delivery flexibility key for online retailers

The latest Delivery Matters research conducted by Royal Mail reveals that more than half the online shoppers surveyed are seeking greater delivery flexibility from online retailers.

Royal Mail said retailers were failing to meet five of the most important customer needs: flexible delivery; a range of delivery options; information on order status; fast delivery; information about delivery charges.

It suggests five ways in which online retailers can enhance their shopping experience: an option to choose delivery day; capturing customers' delivery instructions and requests; order tracking; fast delivery options; information about delivery costs and returns policy at the beginning of the order process.

Services to online retailers provided by Royal Mail include a delivery promise tool that audits websites for navigation, buying process, delivery options and information. E-commerce Engine helps online retailers manage their inventory, accounts and logistics and Royal Mail PacketPost Returns provides a returns service through local post offices.

"It's vital that online retailers regularly evaluate the scope of their delivery offerings and look for new ways to satisfy customer expectations," said David Smith, managing director of IMRG whose data was used by Royal Mail to cross-check its own survey results.

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More capacity at DHL Packstations

Deutsche Post DHL is expanding its Packstations to accommodate more users and bigger shipments.

In 45 existing Packstation locations in Germany, Deutsche Post is using a new modular system that expands the 76 secure lockers provided by standard Packstation units to a maximum of 390.

Other improvements include protection from ice, screens that are easier to read and provision for larger shipments through adjustable lockers. A 2D scanner integrated in new units will provide additional applications in future for new products.

DHL Germany says that more than 1.5m customers have registered for DHL Packstation. Currently, there are 2,500 installations and 150 more are planned by the end of the year.

GLS Germany offers parcel collection

GLS Germany has launched ShopDelivery-Service offering parcel recipients the option to collect at a specified parcel shop when making online purchases.

GLS has a network of 5,000 parcel shops in Germany. Last year it offered parcel recipients the option to collect from their nearest parcel shop if they were not at home when GLS made its first delivery attempt.

With ShopDelivery-Service, recipients can specify delivery to their most convenient parcel shop which might not be the one nearest to their home. They will be alerted by SMS or email when their parcel is ready for collection.

Parcels will be held for ten days and recipients will receive a reminder to collect after five days.

Norway Post increases earnings

Norway Post achieved first-half earnings before non-recurring items and write-down of NOK511m, an increase of NOK130m on the same period last year.

The company improved its result despite declining volumes for mail and logistics, a transport strike and lower levels of activity in technology markets served by its ErgoGroup subsidiary.

Chief executive Dag Mejdell said the Spinnaker efficiency programme was contributing to improved results. The company would continue with the programme in order to adapt operations to lower levels of activity and structural changes in the market. Spinnaker has so far produced efficiencies worth NOK1.6bn since it began in 2008.

Operating revenue in the first half was NOK13.4bn, NOK421m less than in the first half of 2009. The mail division's operating revenue was NOK6.2bn, down by NOK251m.

Logistics was affected by the transport strike. Operating revenue fell by NOK159m to NOK6.1bn despite a 4.7 percent increase in the total parcel volume.

ErgoGroup entered a merger agreement with EDB Business Partner ASA. Once competition authority approval is granted, Norway Post will own 47 percent with a commitment to reduce its shareholding to 40 percent in the next two years.



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Ad campaign promotes the bpost name

Belgian consumers and businesses are being familiarised with the postal service's new bpost name and logo in a media campaign involving radio, television, magazines and the internet.

The campaign, which started on 01 September, aims to demonstrate that the new identity reflects modernisation of the post's corporate structure, services and customer focus. It is supplemented by a letter from chief executive Johnny Thijs to 4.5m households explaining the reasons for the name change.

The new identity is being introduced gradually to vehicles, buildings and uniforms. The logo will be displayed on about 1,500 more vehicles each year until it covers the whole 6,500 vehicle fleet.

By the end of this year, one third of postal bicycles will be updated to the bpost livery and 80 post offices will display the bpost identity; by the end of 2011, 15,000 postal employees will have uniforms bearing the bpost logo.

Intelligent stamp offers online content

Royal Mail has launched an "intelligent" stamp, which uses image recognition technology activated by a smartphone to access online content.

The first intelligent stamp is part of the Great British Railways issue. It is linked to a short film of actor Bernard Cribbins reading WH Auden's poem, "The Night Mail".

The content is available on iPhone or Android platforms. Users can search for the free JUNAIO application in iTunes or Android Market. Once downloaded, users can navigate to the Royal Mail channel and select the Great British Railways logo.

"Through intelligent stamp technology, our stamps will open up to a whole new world of information, interest and fun to collectors and the millions of people who will receive them on letters in the coming months," said Philip Parker, Royal Mail Stamps spokesman.

GLS to raise its rates in France

GLS France will increase its rates for domestic and international parcels by 3.8 percent on 01 October in response to price erosion during the economic downturn.

"Customers should understand that quality costs money. A fair relationship between price and performance enables them to profit from a better service quality in the long run," said GLS chief executive Rico Back.

Restructuring in France is due to complete in the current financial year with the opening of a hub in Lille. Inbound parcel volume has increased by 15 percent, according to the company.

TNT gains more home delivery business

TNT Express has won new business from RS Components in Italy and has had its contract renewed in France under a two-year agreement.

The company will be providing a next-day service to RS Components' customers, delivering mainly to engineers at domestic addresses. The contract also includes several shipments to the United Kingdom.

TNT Express already works for RS Components in the UK, Singapore, Thailand and Germany. The company said the new contract was in line with its ambition to leverage its domestic parcel networks across Europe.

Volcano causes slight mail quality shortfall

Royal Mail narrowly missed its First Class quality-of-service target in the second quarter on account of the Icelandic volcano eruption, which grounded air transport in April.

On-time delivery performance in the three-month period was 92.6 percent compared with a target of 93 percent. Royal Mail said that First Class mail was transferred to road and ferry services when flights were disrupted but there were no alternative transport routes that would ensure next day delivery.

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First Class bulk mail was similarly affected and narrowly missed its target.

Second Class mail exceeded its 98.5 percent target during the quarter achieving a 98.6 percent on-time performance. Most business mail services, standard parcels and international mail to Europe met their targets.

GLS Ireland offers next-day service

GLS has launched a guaranteed next working day express service across Ireland for items weighing up to 30 kg. A before noon service is available in parts of the country.

The service includes online real-time tracking, insurance cover up to €350 and email or SMS alerts on request. The money-back guarantee applies to the surcharge for next day delivery above the standard delivery rate.

Putin considers status change for post

A Russian newspaper has reported that Prime Minister Vladimir Putin has commissioned a feasibility study into the transformation of Russian Post into a public limited company.

An attempt to change Russian Post's status could encounter difficulties from municipal authorities and individuals that could assert their rights to property in courts.

Yevgeniy Chechelnitkiy, advisor to Russian Post's chief executive, told the Kommersant newspaper: "There are a lot of issues to be sorted out related to tenure. A special law is indispensable stipulating the characteristics of management and property disposition of organisations that work in the field of postal communication."

A change of status could also lead to financial difficulties if creditors required early repayment of loans.

Deutsche Post freed of need to repay aid

The European Court of Justice has ruled that Deutsche Post does not have to pay back €1.15bn in state aid and interest that the European Commission claimed had over-compensated the company between 1990 and 1995. At appeal, the Court of Justice upheld a ruling by the General Court which found that the commission had failed to examine all the evidence and had used a "defective" method. The commission had claimed that the lower court overreached its powers by using its own method to calculate Deutsche Post's entitlement to compensation.

Following the ruling, the commission said it would continue an investigation that it launched in 2007 into whether compensation received by Deutsche Post from the German Government had led to any distortion of competition.

New Dutch postage rates from January

New postage rates will apply in the Netherlands from January for domestic mail and international mail to Europe. The basic domestic letter rate will rise by two euro cents to €0.46 and the rate for letters to Europe will increase by the same amount to €0.79.

TNT Post said the increases, the first since January 2007, were necessary in the light of "volume and cost developments".

PostFinance app allows money transfer

Swiss Post's PostFinance has launched an iPhone application that allows users to transfer small amounts of money from one postal account to another.

The app also features a search function that identifies the nearest post office and up-to-date stock market information.

PostFinance said the launch was intended to consolidate its image as an innovative financial institution.

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Acquisitions boost Geodis result

Geodis, the transport subsidiary of French railways SNCF, returned to profitability in the first half of 2010 with an operating profit of €13m, a €40.2m improvement on the first half of 2009.

The company increased its half-year revenue by 37.1 percent to € 3.11bn. Acquisitions in the freight and express markets contributed €523.5m in new revenue and a positive currency effect contributed €52.8m.

At group level, SNCF Geodis, which incorporates Geodis and SNCF's rail freight business, increased revenue by 25 percent to €4.31bn. Underlying growth was 7.6 percent excluding acquisitions and other effects. The division made an operating profit of €51m compared with a loss last year of € 61m.



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100 companies sign up for E-Postbrief

Deutsche Post has reported that its secure electronic letter, E-Postbrief, has attracted registrations from more than 100 German companies since its launch in July.

Trainees run their own post offices

Swiss Post is opening another four post offices run entirely by trainees in an initiative that has been running since 2008. Following a month-long induction period, eight to twelve trainees take over responsibility for their own post office with two advisors on hand to support them.

Postal services continue in fire-affected Russia

Russian Post responded to problems cause by fires in the southern part of the country to ensure that postal services were available.

It made early payments of pensions and benefits for September to residents affected by the fires, which destroyed or damaged several post offices.

Spain's ASM buys Envipaq

Spanish parcel services provider Agencia Servicios Mensajería (ASM) has acquired for an undisclosed sum the local express operator Envipaq, launched by a group of individuals in 2009.

DPD Russia aims for 60 depots

DPD has added five new locations to its network in Russia and plans to have almost 60 depots across the country. Seven depots are planned for opening by the end of this year.

Azkar acquires ACL

Spanish freight group Azkar has acquired cargo handling company ACL, which provides operational management in Spain for Russian cargo airline Air Bridge.

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Pay talks begin at the US Postal Service

The United States Postal Service has begun a new round of wage contract negotiations and is warning employees that unions will face some "unpleasant proposals", according to the American Postal Workers Union, AFL-CIO (APWU).

The APWU, whose contract expires on 20 November, was the first of four postal unions to begin talks. The biggest union, the APWU represents 211,000 clerks, mechanics, drivers, custodians and administrative staff.

The National Rural Letter Carriers' Association (NRLCA), whose contract also expires on 20 November, began talks on 13 September.

Postmaster General John E. Potter said unions and management had a joint interest in the future viability of the Postal Service. He promised to work for an agreement that benefitted both the Postal Service as an institution and its employees.

The National Association of Letter Carriers AFL-CIO (NALC) and the National Postal Mail Handlers Union AFL-CIO (NPMHU) will begin negotiations next year. Both of their contracts expire in November 2011.

Safe drivers clock up a million miles each

A total of 5,858 professional drivers for the United States Postal Service have completed more than a million accident-free miles each since 2005, when records began.

It takes 30 years' service to achieve a million driving miles, and the Postal Service said the achievement results from the right recruitment, training and attitude in its 221,000-vehicle fleet.

A select few drivers have achieved the Postal Service's two million mile safe driving award. For example, rural carrier Dwayne "Oley" Raskey has been delivering mail for 52 years and has never had an accident nor called in sick.

"If it's muddy or snowy you've got to slow down," said Mr. Raskey who navigates his daily 96-mile route almost exclusively on gravel roads.

100% screening brings no headaches

Leading express operators TNT and DHL have reported few difficulties following the introduction in August of 100 percent screening of all cargo loaded onto passenger aircraft in the United States.

TNT Express relies on third-party commercial capacity, especially bellyhold space on passenger aircraft, for inter-continental uplift. It said it has experienced no significant disruptions as a result of the new rules, although it did experience some delays on large consolidations of shipments at the beginning.

DHL's express and forwarding divisions have been screening 100 percent of cargo on outbound passenger flights since May, choosing to screen from the start rather than simply to meet the Transportation Security Administration's phased introduction.

DHL cuts China-to-US delivery time by 75%

DHL is now the exclusive international delivery provider for Stretchy Shapes, the children's bracelets that are the new craze across the United States.

It is helping the six-month-old Alabama-based company to meet exploding demand by expediting imports from Asia to the US, cutting the delivery cycle by 75 percent.

The original distribution process involved a forwarding agent and a delivery time from Chinese factory to US warehouse of eight to twelve days. DHL is now picking up in Xiamen and delivering in Birmingham, Alabama, in two to three days.

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Ken Allen joins DHL-Sinotrans board

DHL Express chief executive Ken Allen is joining the board of the company's Chinese joint venture, DHL-Sinotrans but has ruled out any intention to take over the company.

DHL has invested US\$1.5bn in Greater China's express network and operations in the past ten years and has launched a domestic express operation.

Mr. Allen will work with the local management on strategic development of the express business. Deutsche Post DHL chief executive Frank Appel said: "Ken Allen will be working closely with Jerry Hsu, president of DHL Express Greater China, to develop our positioning in the Greater China market and look for additional growth opportunities to leverage our pioneering position."

Zhao Huxiang, president of Sinotrans Group and chairman of the DHL-Sinotrans joint venture board, commented: "He will bring new perspectives and international best practices that will not only further strengthen our 24 years' of rewarding partnership and cooperation but also bring our business to new heights."

DHL said it would continue to invest in China, the world's fastest growing express delivery market.

TNT pledges €170m for Chinese network

TNT is to invest €170m in its Chinese domestic road operation over the next few years in order to enable TNT Hoau, its road distribution business in the country, to enhance its day-definite network with new services and staff.

The day-definite service offers a reliable, cost-effective and fast door-to-door alternative to domestic air freight, according to TNT. The company also provides less-than-truckload services across the country.

Overall, TNT Hoau manages a road distribution network of 1,500 depots and 57 domestic hubs serving more than 600 Chinese cities.

In a separate announcement, TNT said it will spend € 4.5m over the next two years on a new fleet of long-haul trucks for its Asian Road Network.

The company said volume had grown by 70 percent between 2009 and 2010 to date. The twelve new trucks and fourteen new trailers will offer 20 percent more capacity and built-in security for remote monitoring 24 hours a day. The vehicles are also 17 percent more fuel efficient than the industry benchmark.

Acquisition and new contracts boost Toll

Australian express and logistics group Toll achieved a seven percent increase in full year revenue to AUD6.9bn and a three percent increase in net profit after tax to AUD279m.

Revenue gains resulted from both acquisitions and contract wins, but net profit was slightly down on the previous year when non-recurring items were excluded.

The figures contrast with weak first half results and reflect cost control measures coupled with "operational excellence", according to the company.

Following restructuring earlier in the year, the group reported separate results for its Toll Global Express division.

Revenue was AUD1.79bn, 38 percent higher than the previous year owing mainly to acquisition of Footwork Express in October 2009. Without Footwork, the division's revenue declined by AUD21m against the previous year.

Earnings before interest and tax (EBIT) were AUD126m without Footwork compared with AUD137.7m the previous year. Footwork's EBIT was AUD7.8m.

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Qantas rebrands its domestic courier

A new brand, Qantas Courier, is offering courier and baggage delivery services to both Qantas and third-party customers in a relaunch that follows from the sale by Qantas of its DPEX network amid restructuring of its express joint ventures with Australia Post.

The new brand within Qantas Freight is designed to reposition Australian and New Zealand operations and complement existing domestic logistics ventures.

Postal service up and running after quake

New Zealand Post was forced to suspend mail delivery in the Christchurch area on 04 September in the immediate aftermath of the earthquake but resumed postal services from 06 September.

More DHL air capacity across the Tasman

DHL Express has placed a new B757 aircraft in service between Australia and New Zealand flying between Sydney and Auckland five times a week.

The aircraft has additional capacity of 15 tonnes and flies on one extra rotation to the B727 it has replaced. DHL says the 757 is also 25 percent more fuel efficient, emits less emissions and operates quieter.

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Later pick-up in China

FedEx Express has extended pick-up time to 20.00 hours for international, low-value shipments from Shanghai, Suzhou, Hangzhou, Ningbo and Shaoxing to Europe.



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IPC
Head of Communication
Avenue du Bourget, 44
1130, Brussels
Belgium

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