



## Top story

**PostNord reports positive results for 2013**

PostNord published its year-end report for the 2013 financial year ended 31 December. Net sales totalled SEK39.5bn (€4.5bn, US\$6.2bn), up from SEK38.9bn (€4.4bn, US\$6.1bn) the previous year. Operating profit grew from SEK511m (€58m, US\$80m) in 2012 to SEK676m (€76.5m, US\$106m) in 2013 and net profit was up from SEK247m (€27.9m, US\$38.7m) to SEK322m (€36.4m, US\$50.4m) in 2013. Cash flows from operating activities totalled SEK1.6bn (€181m, US\$251m) in 2013, down from SEK1.8bn (€204m, US\$282m) the previous year.

The results for the final quarter for 2013 were overall positive. Net sales increased to SEK10.6bn (€1.2bn, US\$1.7bn) compared to SEK10.5bn (€1.2bn, US\$1.6bn) during the same period the previous year. Operating profit totalled SEK180m (€20.4m, US\$28.2m), up from SEK158m (€17.9m, US\$24.8m) the previous year. Profit was down year on year to SEK33m (€3.7m, US\$5.2m), from SEK69m (€7.8m, US\$10.8m) in the fourth quarter of 2012.

Håkan Ericsson, President and CEO, said that the group is going through a phase of significant change and that the major structural changes the company is implementing are aimed at securing profitability within Mail, developing its logistics business and capitalising on opportunities in markets undergoing dramatic changes.

Source: [PostNord](#)



## IN BRIEF

**New head for PostNord Logistics**

Peter Kjaer Jensen has been appointed Head of Business area Logistics. He has a solid background in logistics, having worked for the A.P. Møller Maersk Group and Damco International A/S. Peter Kjaer Jensen will take up his position on 1 April 2014.



## ■ CANADA POST AND PUROLATOR SIGN AIR CARGO AGREEMENT WITH CARGOJET

## Americas

**Canada Post and Purolator sign air cargo agreement with Cargojet**

Canada Post and its parcels subsidiary Purolator have signed a contract with freight airline Cargojet for domestic air cargo delivery services.

The seven-year agreement includes the option of extending it for another three years. Projected revenues from the deal are estimated at about CA\$1bn (€649m, US\$899m) for the initial seven-year period, based on projected volumes.

As part of the deal, Cargojet will offer comprehensive air cargo services within Canada for the whole of Canada Post Group, including Purolator's national air cargo network. To handle the additional volumes, Cargojet will expand its domestic overnight network and set up a virtual dedicated Air Cargo Network for Canada Post.

Source: [CEP Research](#)



■ NEW ZEALAND POST GROUP IMPROVES HALF-YEAR RESULT ■ REEBONZ TAKES OVER SINGPOST'S E-RETAILER BUSINESS ■ FREIGHTWAYS HAS RECORD HALF-YEAR PROFITS AS B2B AND B2C GROW

## Asia Pacific

### New Zealand Post Group improves half-year result

The New Zealand Post Group recorded an improved result for the half year ended 31 December 2013, boosted by a strong focus on expenditure reduction.

The Group reported an after-tax profit of NZ\$71m (€44m, US\$60m) compared with NZ\$60m (€37m, US\$51m) in the same period the year before. Meanwhile, revenue from operations was down to NZ\$860m (€527m, US\$730), compared to NZ\$872m (€534m, US\$740m) during the same period the previous year. The directors declared an interim dividend of NZ\$2.5m (€1.5m, US\$2.1m) for the period, the same as for the first half of the last financial year.

New Zealand Post Group Chief Executive Brian Roche said the overall improved result was largely attributed to a reduction in expenditure of NZ\$32m (€20m, US\$27m), which more than offset the NZ\$12m (€7m, US\$10m) decline in revenue. The steps taken were in line with the Group's refreshed strategy introduced in November, Roche said. The transformation plan, for the next three to five years, focuses the Group on finding lower-cost ways of working to manage the falling volume of mail coming into the network as well as growing its logistics, parcels and financial services businesses and delivering new products and services.

Source: [New Zealand Post](#)

### Reebonz takes over SingPost's e-retailer business

SingPost is handing over its e-Commerce retail business Clout Shoppe to the luxury e-retailer Reebonz so it can focus on e-fulfilment and logistics services while further expanding its e-Commerce activities.

SingPost launched Clout Shoppe in summer 2011 as an online shopping mall for luxury. Wolfgang Baier, SingPost CEO, explained: "We are intensifying our efforts to meet our customers' current and evolving needs and are investing more than SGD100m to upgrade postal infrastructure, introduce new delivery channels, modernise touch-points and improve operations. At the same time, we will contribute to the growth of the e-Commerce ecosystem in Singapore and the region by leveraging our strength in delivery and end-to-end logistics solutions via our role as an e-Commerce enabler."

Launched in 2009, Reebonz has introduced the concept of selling luxury goods through invitation-only flash sales which usually last two to three days.

Source: [CEP Research](#)

### Freightways has record half-year profits as B2B and B2C grow

New Zealand transport and delivery group Freightways achieved record profits in the half year ending 31 December 2013, due to B2B and B2C growth in its core express parcels business.

The company's consolidated operating revenue rose 6% to NZ\$218m (€134m, US\$185m). Underlying earnings (operating profit) before interest, tax, depreciation and amortisation (EBITDA) rose 6% to NZ\$42m (€26m, US\$36m) and EBITA increased 7% to NZ\$36m (€22m, US\$31m). Net profits came in 9% higher at NZ\$22m (€13m, US\$19m).

Operating revenue for the information management division rose 3% to NZ\$51m (€31m, US\$43m) and the division now generates around 25% of Freightways' revenue and earnings. EBITDA improved 5% to NZ\$12m (€7m, US\$10m) and EBITA rose 8% to NZ\$10m (€6m, US\$8m).

Source: [CEP Research](#)



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## Europe

### PostNL reports solid performance in 2013



PostNL published its financial results for 2013, which remained solid due to strategic steps taken over the past year. Herna Verhagen, CEO of PostNL, stated: "In 2013 we accomplished significant steps for the future of our company. Our underlying cash operating income of €141m (US\$195m) was in line with our outlook. A solid result in a year in which the environment was challenging."

Underlying revenue for the 2013 fourth quarter remained flat year on year at €1.2bn (US\$1.7bn), while fourth-quarter underlying cash operating income was up 21% to €81m (US\$112m).

Cost savings and price increases more than offset the mail volume decline, while the Parcels and International segments continued to grow – with Parcels volume up by 6.7%.

Source: [PostNL](#)

### Le Groupe La Poste publishes financial results

On 20 February, Le Groupe La Poste announced the financial results for its financial year ended 31 December 2013. According to CEO Philippe Wahl, 2013 was a year of change.

The group reported strong consolidated revenue, with a year-on-year 2% growth at €22bn (US\$30bn), driven largely by strong results for La Banque Postale and its Colis-Express parcel service. Mail volumes and retail revenue continued to decline and were not fully compensated by the growth of other segments, cost reductions and tariff changes. The group EBIT declined by 4.2% compared to last year. Group net profits were up €627m (US\$868m) after taxes and interest. Operating revenue was down 5.6% year on year to €770m (US\$1.1bn). The group reported an increase in net debt.

In January, Le Groupe La Poste launched a new strategic plan – called La Poste 2020: Conquering the future – to provide a sustainable perspective for the group. The new plan was the result of a wide consultation with customers, postal workers, officials unions and associations. Its aim is to accelerate the development of existing services and the expansion to new business areas.

Source: [Le Groupe La Poste](#)



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## IN BRIEF

### bpost appoints Koen Van Gerven as new CEO

bpost has appointed Koen Van Gerven as the new CEO after Johnny Thijs decided not to renew his mandate as CEO. Working at bpost since July 2006, Van Gerven has been in charge of the important transformation of bpost's retail network and has led the ICT department for three years. Van Gerven was responsible for all sales and marketing activities in Belgium related to mail products and solutions, banking activities and other financial products.

### SEUR obtains new certification

GeoPost subsidiary SEUR Logística has been certified to OHSAS 18001, which covers occupational health and safety management.

SEUR Logística had already obtained ISO 9001 certification in 2000 and ISO 14001 in 2009. The latest certification was granted by Spanish standardisation organisation AENOR.

According to Avelino Brito, Chief Executive of AENOR, "more and more companies are seeking to go over and above the legal requirements when it comes to occupational health and safety. They know that employee engagement is a fundamental asset for their development.

Source: [SEUR](#)

### Chronopost launches solution for electronic market

Chronopost France launched a new return service for electronic products. The service, called Zengo, enables consumers to easily return electronic devices for repair.

An estimated 4% to 20% of hi-tech products sold in France are returned for after-sales service (non-compliant products, a manufacturing defect etc). The consumer is entitled to request a repair or the replacement of the defective product with a new one. The solution offers: universal packaging; a network of over 3,000 parcelshops to deposit the returned goods, and express transport.

The service has already been tested in the Chronopost network over the past months and has now become available to market leaders before being marketed to all stakeholders.

### DPD Germany changes price structure and launches real-time parcel tracking

At the beginning of March, DPD Germany changed its price structure for parcel shops enabling private shippers to save money when paying online in advance. Meanwhile DPD also launched a new map display, which allows customers to track their parcels live at any time.

As part of the new price structure, DPD is launching a new XS parcel for €3.90 which will only be available at its online



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portal. In many other parcel categories, there will be further price reductions for all shipments that are paid online and then handed in at a DPD ParcelShop. Alternatively, a DPD courier can come to collect the parcel at customer's door step, subject to a surcharge. In contrast, parcels which are paid for at the ParcelShop will become a little more expensive, with prices rising by an average of 6%.



In addition to a new parcel pricing structure, DPD has also upgraded tracking capabilities for customers enabling them to track their parcel in real time on the day of delivery right up to the time when it arrives at their doorstep, with a new map display showing the current location of the parcel. This way, recipients can better estimate when the delivery driver will make the delivery.

Source: [CEP Research](#)

### DPD UK invests in new depot and upgrades delivery notification service

DPD UK has expanded operations and services with a £3.5m (€4.2m, US\$5.8m) parcel depot in Petersborough, East England, and a new 'early warning' delivery notification service for the online fashion retailer Asos.

The new, 3,437m<sup>2</sup> facility will start operations in April to keep up with the rising parcel volumes in the region generated through the company's highly successful Predict service.

The larger site includes more parking and office space as well as the latest automated sorting technology with the capacity to sort 3,500 parcels an hour to improve operational efficiency considerably.

Source: [CEP Research](#)

### Norway Post invests in e-Commerce and digital mail solutions

Norway Post reported good results for 2013. "2013 is the sixth year in a row of improvements in our underlying results. The reasons for this are cost reductions and the fact that we are very successful in the market," says Norway Post CEO Dag Mejdell.

The post stated it is continuously reorganising its operations to meet a more digital future and is investing in e-Commerce and digital mail solutions. In the logistics segment, the increase in e-Commerce contributed to the growth in revenue.

The company noted a distinct shift from physical to digital mail. The volume of addressed mail fell by 5.7% in 2013, while the volume of unaddressed mail declined by 7.3%. At the same time, almost 300,000 Norwegians are using Norway Post's digital mailbox, Digipost. In 2013, 3m letters were sent via Digipost.

Source: [Norway Post](#)



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## DHL improves integrated technical services to cut costs for customers

DHL Supply Chain has expanded its integrated aftermarket Technical Services through new global collaboration agreements with strategic partners for selected repair activities within the warehouse, with the aim to cut total costs for customers by 25%.

The electronics industry spends US\$19bn (€14bn) on managing customer returns every year as tasks including receiving, assessing, repairing, re-boxing and re-selling returned products make up on average 6% of total sales revenue, DHL explained.

The new multi-vendor partners selected due to their extensive repair capabilities and geographic reach will enable the company to test, screen and repair more products in the reverse technology supply chain.

Source: [CEP Research](#)

## Royal Mail launches TV campaign targeting businesses

Royal Mail is launching its first TV advertising campaign aimed at parcel business customers for almost five years. The campaign, which was first aired on Wednesday 5 March, promotes Royal Mail's trust amongst consumers as the parcel delivery partner for online retailers.

The 40-second ad, which follows a consumer-oriented TV campaign last autumn, highlights independent research that shows that online shoppers trust Royal Mail to deliver their orders more than any other national parcel company.

Royal Mail will also be undertaking a direct mail campaign highlighting to decision makers in large businesses as well as SMEs and eBay power sellers how the post has helped companies of similar sizes. This will be supported by national press, digital and outdoor advertising.

Source: [Royal Mail Group](#)

## Austrian Post launches new smartphone app for business customers

Austrian Post has developed a smartphone app for its 150,000 business customers to make advertising mail products and mail solutions more accessible for them. With the new Post Business App, the complete service portfolio of the postal operator is now available on smartphones and tablets.

Several tools integrated into the Post Business App provide additional support to customers when planning and designing their advertising media. The postal operator said the app was designed to ensure rapid availability of information and contacts.

Source: [CEP Research](#)

## TNT Express UK installs cameras in delivery vehicles

TNT Express UK is equipping 500 vehicles across its fleet with in-cab black box camera systems to encourage safer and more fuel-efficient driving and to improve the overall speed and performance while also enhancing driver security.



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TNT has been trialling the RoadHawk Black Box Vehicle Camera Systems installed in vehicles that have been operating from its Rotherham Depot in South Yorkshire over the past nine months. The pilot was a success, with 56% of the drivers stated that the presence of a camera helped them improve their driving behaviour and 75% felt the cameras improved their personal safety and security.

The RoadHawk technology comprises a CCTV camera with a wide-angle lens placed in front of the windscreen of the vehicle, which films the road ahead. In case of an incident, it captures events on a memory card, which provides a full video display with GPS overlay on Google Maps to identify the vehicle location, speed and G-Force.

Source: [CEP Research](#)

### German consumers refuse to pay for same-day deliveries, study says

The majority of German online shoppers are not willing to pay an additional charge for same-day delivery services, according to a new study, called 'Success factor shipping', which was supported by Hermes Germany among others.

Conducted by the research institute ibi research and presented at the Internet World fair in Munich last month, the survey examined various logistics services and their impact on the success of online shops, including same-day delivery and flat-rate shipping rates.

Same-day deliveries remain a niche topic in Germany, with the ibi research revealing that 53% of the respondents would only use same-day delivery if they don't have to pay for it while only 27% are willing to pay an extra charge. When it comes to food, this premium amounts

on average to €3.17, the study found. Same-day deliveries of high-quality electronic products cost on average an additional €15 at most. Around 20% of the consumers surveyed are not interested in same-day deliveries at all.

Source: [CEP Research](#)

### UK online shoppers make one third of their purchases via mobile devices

British online shoppers are increasingly turning to their smartphones and tablets to make a purchase, with more than a third of UK internet sales generated through mobile devices in the fourth quarter of 2013/14, according to the latest results from IMRG Capgemini Quarterly Benchmarking (Q4 2013/14).

The survey showed that between November 2013 and January 2014 mobile retail – or m-retail – accounted for 32% of the overall online sales in the UK, of which 6% were made via smartphones while tablet devices were used for 26% of e-retail sales during the quarter. During the previous quarter, m-retail penetration made up only 27% of internet sales, representing an 18% growth between the third and the fourth quarter of 2013.

IMRG said that, while m-commerce has been rising rapidly,

#### IN BRIEF

##### Poste Italiane investment award

Poste Italiane received the European Landmark Deal Award for the reliability and performance of its investment products. The award, sponsored by the magazine MTN-I, was granted to a private placement of €50m (US\$69m) performed in October 2013.



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the growth rate of 'click and collect' sales has slowed down slightly from the record high percentage of 19% in the third quarter to 16% in the fourth quarter. At the same time, the average bounce rate, which is defined as single page visitors, also fell between Q3 and Q4 to 25% in Q4.

Source: [CEP Research](#)

### UPS extends Proactive Response Secure service across Europe

UPS has extended its service for high-value, time- and temperature-sensitive shipments to key European markets after launching it throughout the USA in June last year.

With the recent geographical expansion, UPS Proactive Response Secure is now also available with UPS Express services to, from and within Austria, Belgium, France, Germany, Ireland, Italy, Luxemburg, Netherlands, Portugal, Spain, Switzerland and the United Kingdom.

The new service protects customers against lost profits ensuring that time- and temperature-sensitive shipments reach their destinations safely and on time. It guarantees up to the retail value, in addition to other costs, when unexpected events occur including weather delays and covers potential losses if products are damaged or spoiled.

Source: [CEP Research](#)

### UPS to expand European B2C service with My Choice delivery options

UPS is poised to further expand its B2C services in Europe with the introduction of its added-value My Choice programme which already has 7m signed-up customers in the USA.



**UPS MY CHOICE**  
ups.com/mychoice

The My Choice service offers registered users various delivery options and notifications. In the USA, the basic service includes free delivery alerts and approximate delivery times as well as rerouting and rescheduling options for US\$5 per change. Premium members, who pay US\$40 a year, have unlimited free rerouting and rescheduling and can be given a two-hour delivery time window for a US\$5 additional fee per notification.

Source: [CEP Research](#)



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### Britain's DX Group raises £200m in IPO

British mail, parcels and freight delivery operator DX Group has raised just over £200m (€240m, US\$332m) in a successful IPO and its shares started trading yesterday on the London Stock Exchange's Alternative Investment Market (AIM) for smaller firms.

The company said it had placed 200.5m shares for £1 each with institutional and other investors. DX was previously owned by private equity firm Arle Capital Partners which acquired it in 2006. Senior managers, including David Hoare, CEO Petar Cvetkovic and CFO Ian Pain, reinvested their existing equity interests and now own approximately 3.64% together.

The DX share closed at £1.30 yesterday and was trading at just over £1.32 early this afternoon.

Source: [CEP Research](#)

### GLS Austria opens new depot in Vienna

GLS Austria has started operating its new €3.6m (US\$5m) depot in Steinabrückl, located in the south of Vienna, with the capacity to sort up to 15,000 parcels daily, after seven months of construction work.

The new building has more than 53 loading gates in total. Of these, seven are destined for the long-distance trucks and 46 for delivery vehicles. With an outside surface of 4,400m<sup>2</sup>, the new depot provides more sorting and routing capacity. Along with the facility in Zirl, located in Tyrol, the Steinabrückl depot represents the second eco-depot of GLS Austria and the 14th of the GLS Group overall. It is part of GLS sustainability initiative "Think Green" to build its new depots according to ecological standards.

Source: [CEP Research](#)



# Market Flash



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