

2015



MARKET INTELLIGENCE

International **Post**  
Corporation



# MARKET FLASH

A fortnightly newsletter covering the  
latest news from the global postal sector



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## > TOP STORY

### NEW STUDY FROM ROYAL MAIL MARKETREACH REVEALS MAIL'S LONG-TERM VALUE TO ADVERTISERS

A new research from Royal Mail MarketReach – called This Time It's Personal – finds that 'valued mail' drives value for advertisers through both direct action and positive brand effect.

'Valued mail' is mail that consumers find useful and/or interesting, and has personal relevance to the recipient, it creates feelings which lead to actions: 92% of respondents had an emotional response to mail they valued, of which 92% took one or more actions. These ranged from direct response, to advocacy or finding out more information, both of which provide brand benefits to advertisers.

**92%**

**RESPONDENTS HAD EMOTIONAL RESPONSE TO MAIL THEY VALUED**

The research shows how mail can create a 'value exchange' in which the mail that consumers value drives value for advertisers. Consumers are most likely to perceive mail as having value when it comes from an advertiser with which they have an existing relationship (85%). Even transactional or account information mail, such as statements or bills, can have value. This suggests that advertisers who treat transactional mail with marketing-led sensitivity can benefit.

Source: [Royal Mail Group](#)

# > AMERICAS

## DIRECT MAIL BEATS DIGITAL ADVERTISING IN DRIVING CONSUMERS TO ACT, ACCORDING TO STUDY

A ground-breaking neuromarketing study shows that direct mail continues to play an important role in the marketing mix, stimulating 70% higher brand recall and driving consumers to act.



Commissioned by Canada Post, the study used research-grade technology to measure the emotional responses of people interacting with digital and physical ad campaigns. The study is the largest of its kind ever conducted and focused on the essential elements of media effectiveness, including ease of understanding and persuasiveness.

The researchers developed two integrated campaigns featuring mock brands, applying the same creative and messaging consistently across each campaign's physical and digital media formats. The 270 participants underwent brain imaging and eye-tracking to test for the campaigns' ease of understanding, motivation and visual attention. Participants were later given memory tests to assess their recall of branded material.

Source: [Canada Post](#)

## 7-ELEVEN LAUNCHES ON-DEMAND DELIVERY SERVICE IN US

Convenience store chain 7-Eleven Inc has launched a new on-demand delivery service in the US in cooperation with start-up firm DoorDash.

The strategic relationship between the two companies will include in-store marketing, local promotions and the availability of "Convenience Packs" or groups of products that make purchasing common items from 7-Eleven stores more convenient.

More than 200 7-Eleven stores in five major metropolitan markets are participating in the service. Customers in New York, Los Angeles and Chicago have been able to order products from their local 7 Eleven stores since 1 September and the service will follow in Boston and Washington, DC in the coming months.

Source: [CEP-Research](#)

## > ASIA PACIFIC

### ALIBABA LAUNCHES WINE E-RETAIL PLATFORM FOR CHINESE MARKET

Alibaba Group announced the opening of the Robert Mondavi Wines exclusive flagship store on Tmall.com, to officially kick off its newly launched Tmall Vineyard Direct programme on its Tmall.com marketplace, China's largest third-party platform for brands and retailers.

The opening of the Robert Mondavi Wines flagship store on Tmall.com marks the official launch of the Tmall Vineyard Direct programme, where Tmall will work directly with wineries globally, to bring the finest and best selection of wines from around the world to the Chinese consumer market.

Robert Mondavi, one of the most historic and esteemed wine brands in California, has chosen Tmall.com as the first and only online destination to reach hundreds of millions of consumers in China. It reflects Tmall's status as the premiere platform for brands and retailers who wish to establish their online presence and direct engagement with customers.

Source: [Alibaba Group](#)

### RAKUTEN LAUNCHES RANGE OF NEW DELIVERY SERVICES

Japanese e-retailer Rakuten is launching several new services designed to speed up and expand deliveries, including an ultra-fast 20-minute delivery service.

In Tokyo, the company launched Rakubin, an express delivery service that can deliver ordered goods in as little as 20 minutes in the districts of Shibuya, Meguro, Setagaya and Minato. Through Rakubin, users can purchase approximately 450 product items, including convenience store goods and drugstore goods, as well as top-ranking products on its leading Rakuten Ichiba portal.

In parallel, the e-retail group has launched Rakuten Delivery Takeout, a new service which allows customers to pre-order take-out meals and products from its Rakuten Delivery website and pick them up at one of about 600 participating stores across Tokyo.



In a third new service, Rakuten has teamed up with convenience store chain Lawson to enable online customers to pick up goods purchased from the Rakuten Ichiba online shopping platform at Lawson convenience stores. Lawson has built an open platform that allows other businesses to use its stores as a base for ordering, pickup and delivery.

Source: [CEP-Research](#)

### NEW ZEALAND POST GROUP REPORTS 'SOLID RESULT' FOR 2015

New Zealand Post Group released the results of its full 2015 financial year. The company reported that – two years into its five-year reset strategy – it has delivered a solid result and laid important foundations for the future.

Reported net profit after tax (NPAT) for the year was NZ\$143m, 34% (NZ\$36m) higher than the last financial year. Underlying profit after tax was NZ\$128m, just over 3% (NZ\$4m) higher than last financial year. Revenue was NZ\$1.6bn, down 0.5%. An unchanged dividend of NZ\$5m was returned to the Government.

# > ASIA PACIFIC

International parcel volume grew strongly in FY 2015, while domestic parcel volume also increased but not as much as we need it to. However, the ongoing decline in the core letters business, a softening global and domestic economy and strong competition in all its markets mean New Zealand Post will have to move faster again this year to maintain positive momentum.

**34%**  
NET PROFIT INCREASE  
FROM PREVIOUS  
FINANCIAL YEAR

Organisational change in FY15 included: realigning courier and postal parts of the business to become more sharply focused on the customer, reducing costs and duplication and investing to significantly improve processes and capabilities. Significant progress was also made on the development of digital solutions in areas including e-Commerce.

Source: [New Zealand Post](#)

## SATS AND SINGPOST TO COLLABORATE IN AREA OF E-COMMERCE

Airport ground handling and airline services group SATS is to provide airmail consignment handling services to Singapore Post (SingPost) within the framework of a commercial agreement. To be located at SATS Airfreight Terminal 1 within Singapore-Changi Airfreight Centre, the 6,000 m<sup>2</sup> facility is expected to be operational by December 2016 with SingPost at its anchor customer. SATS will become the first ground handler in the world to own such an airside facility.

This collaboration will result in the integration of both SATS' and SingPost's airmail consignment operations under one roof. The integration will enable single scanning and sorting, and remove the need to tow consignments such as mail and parcel bags as well as pallets between facilities. This will enhance operational efficiency, including shorter cycle and connection times, and increase productivity. When fully operational, SATS eCommerce AirHub is expected to achieve a productivity gain of more than 30%.

Source: [CEP-Research](#)

## SUPPLY CHAIN AND E-COMMERCE TOP FOR ASIA PACIFIC

Improved efficiency of the end-to-end postal supply chain and e-Commerce development have emerged as top priorities for Asia Pacific for future postal services at the Universal Postal Union's (UPU) regional strategy conference in Bangkok, Thailand. The event was the fourth of seven regional conferences being held in all world regions, a series of high-level meetings meant to shape the World Postal Strategy for the 2017-2020 work cycle.

The outcomes of the Bangkok conference echo those of other world regions. Strategy conferences in Africa, Latin America, and Europe and the CIS have all highlighted operational efficiency and e-Commerce as priority areas for development. Other priorities were identified as financial services, postal sector development, and the diversification of products and services.

The roadmap for global postal services will be signed off at the UPU Congress next year in Istanbul, Turkey.

Source: [UPU](#)



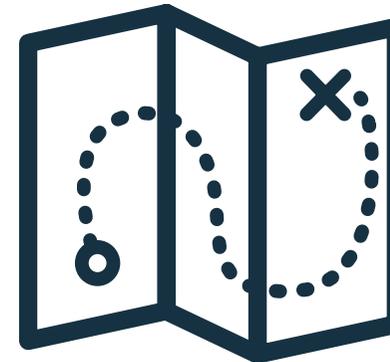
# > ASIA PACIFIC

## UPS ANNOUNCES SERVICE ENHANCEMENTS

US package delivery giant announced a range of service enhancements in the country. The service enhancements are designed to bring “greater flexibility and efficiencies to Taiwanese businesses” as UPS “improves shipping time between Taiwan, Asia and Europe.”

Leveraging a direct flight connection between Taipei and UPS intra-Asia hub in Shenzhen, customers can now benefit from improved time-in-transit and later cut-off times to tender shipments to UPS in key cities. There is also a one-day improvement of time-in-transit for shipments from Europe and Asia to three cities in the non-metropolitan areas of Taiwan. Finally, an extension of the UPS Express® service between European and Asian cities to three cities in Taiwan. This guaranteed, time-definite service allows shipments to reach metropolitan areas by noon.

Source: [CEP-Research](#)



# > EUROPE

## POST OFFICE HAS BECOME A PLACE FOR MAINLY RECEIVING PARCELS

According to a study conducted by TNS Emor and commissioned by Eesti Post, 37% of the adult population of Estonia visit a post office once or twice a year and 26% do not visit one at all during a period of two years.

TNS Emor research specialist Lele Aak explained that the main reason for visiting a post office is to receive parcels (51%). People also go to post offices to buy stamps (40%) and other goods (29%). Four in ten would like to use a parcel machine for sending parcels, while only 28% would prefer a post office. The study also revealed that although 40% of the population of Estonia visits post offices to buy stamps, 36% would in fact prefer to do so in stores or shopping centres or kiosks.

During the last year only one in four people have sent paper mail (excluding Christmas cards) and only 8% of the population have done so during the last month. As expected, 76% of the respondents prefer to send mail electronically and 70% had not once received paper mail during the last year. The service of making payments at a post office has been used even more rarely.

Source: [Omniva](#)

## DPD FRANCE PARTNERS WITH E-COMMERCE SOFTWARE PROVIDER PRESTASHOP

DPD France has signed an agreement with PrestaShop, the European leader of 'open source' e-Commerce software solutions, as part of which DPD is now listed among PrestaShop's recommended transport providers.



Helping retailers to create and manage their online presence, PrestaShop cooperates with 250,000 e-retailers, with DPD France now being available in their back-offices as a new transport module. PrestaShop's 'open source community' comprises 850,000 members.

Source: [CEP-Research](#)

## POSTI EXPERIMENTS WITH ROBOTIC HELICOPTERS IN E-COMMERCE DELIVERIES

Starting from 2 September, Posti will carry out a four-day experiment to test the technology of the future in e-Commerce logistics and mail delivery.

In the experiment, Posti will be testing a robotic helicopter – also called a drone or unmanned aerial vehicle – in delivery and transport tasks for the first time in Finland, and for the first time in Europe in an inhabited urban environment. The robotic helicopter will fly and carry parcels from Helsinki to the nearby island of Suomenlinna, for a flight distance of approximately 4 km. This experiment only includes parcels of suitable dimensions (with a weight less than 3 kg). All other mail, such as letters and publications, will be delivered by boat as usual.

The experiment has been authorised by the Finnish Transport Safety Agency (Trafi) operating under the Ministry of Transport and Communications.

Source: [Posti](#)



## > EUROPE

### PARCEL OPERATORS CHALLENGE DHL WITH HOME DELIVERY PARCEL BOX IN GERMANY

DPD, GLS and Hermes have set up a joint firm under the name 'ParcelLock' to launch a network of carrier-neutral 'parcel boxes' for residential delivery in Germany in competition to DHL's exclusive network.

The three parcel operators decided to team up to create a joint alternative system after market leader DHL Parcel, which launched its exclusive 'Paketkasten' system last spring, refused to open up its network to access by competitors. The 'ParcelLock' solution, which will be open to all parcel operators, is currently being tested and will be publicly presented in October before being rolled out. The final-mile solution will help all three companies to raise their residential delivery success rates significantly, thus reducing costs for repeat delivery attempts or alternative delivery solutions, according to experts.

The joint scheme, which the three companies have been working on over the last year, has been approved by the German competition authority as not impacting negatively on competition.

Source: [CEP-Research](#)

### TNT GERMANY SIGNS UP 3D TRINCKLE FOR 3D PRINTING IN LOGISTICS PROCESSES

TNT Germany is partnering with established German provider of 3D printing solutions, 3D trinckle, to support customers in the implementation of 3D printing for additive manufacturing in logistics processes. Through the partnership with 3D trinckle, TNT can provide the technological and production know-how on a professional level.

It follows an announcement by the company in May this year that it was seeking customers for possible 3D printing activities such as spare parts logistics. TNT has established 3D printing stations at several of its value-added logistics sites in Germany enabling customers to play through and discuss possible scenarios with experts for the use of 3D printing. TNT Germany is targeting both large companies with complex supply chain requirements and also smaller and middle-sized customers who have not really come in touch with the additive 3D manufacturing process until now.

Source: [CEP-Research](#)

### DHL TO INVEST EXTENSIVELY IN SUB-SAHARAN AFRICA

Frank Appel, Chief Executive Officer of Deutsche Post DHL Group, visited South Africa and Nigeria at the end of August. The visit demonstrated the overall importance of emerging markets in the Group's Strategy 2020.

DHL Express, which operates across 51 countries and territories in the region, has a planned investment in excess of €17m in 2015. Major projects underway include upgrades to facilities and shipment handling systems throughout the region. In October 2014, DHL already announced investments totalling €30.5m in South Africa, by both its Supply Chain and Global Forwarding divisions.



The Group's long-term growth plans for the region is to bring state-of-the-art infrastructure, IT systems and world-class services to support businesses operating in Africa.

Source: [Deutsche Post DHL](#)

# > EUROPE

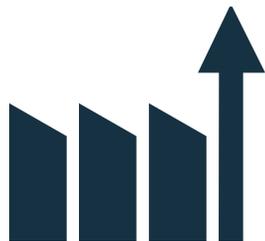
## DEMAND FOR SELF-SERVICE PARCEL TERMINALS IS GROWING IN LITHUANIA

From January to July 2015, usage of Lithuania Post's self-service parcel terminals LP EXPRESS 24 has increased by more than 100% in comparison with the same period last year.

From January to July, business customers have used self-service terminals almost twice as much as last year, whereas, residential customers' participation has increased by 128% compared with the same period in 2014.

Currently, there are 71 self-service parcel terminals LP EXPRESS 24 equipped in Lithuania, mostly used by residents of the three largest towns in Lithuania – Vilnius, Kaunas and Klaipeda. Using these self-service terminals it is possible to dispatch parcels not only within Lithuania but also to 22 European countries.

Source: [Lithuania Post](#)



## LITHUANIA POST REPORTS STRONG REVENUE INCREASE

During the first six months of this year, Lithuania Post has earned more than €0.5m net profits according to unaudited data. Company's sales revenue reached €32.7m and increased almost by 15.9% compared with the same period last year.

From January to June 2015, postal services delivered the main sales revenue and totalled €18.9m. Received postal services income increased by 23.4% in comparison with the same period in 2014. This increase occurred because of a rise in international postal items. Income from dispatched international postal items increased 67.7%, while income from inbound international postal items was up by 22.1%.

Source: [Lithuania Post](#)

## GOOD FIRST SIX MONTHS FOR POSTEN NORGE

Posten Norge has delivered a good half-year performance. Turnover grew by 3%, despite a continued decline in letter volumes. The growth is in parcels as a result of increased online shopping.

Operating revenues in the first half of 2015 were NOK 12.4bn, which is an increase of NOK 364m (3%) on the corresponding period of 2014. Operating profit

before non-recurring items (EBIT) in the first half of the year amounted to NOK 314m, which is NOK 2m higher than at the same time last year. Developments in the mail segment were affected by the continued fall in letter volumes. Mail sent by the public sector accounted for the greatest decline in addressed mail (-9%) as a result of the transition to digital solutions. The Logistics segment is influenced by the reduced activity in the oil industry, but managed to achieve a growth in operating revenues of 5.5%, where underlying organic growth was 4.4%. The Group's total e-Commerce volume has increased by 8% during the past year.

In Q2, Posten Norge achieved an overnight delivery rate of 85.8%, which was 0.8 percentage points above the licence requirement. The other five licence requirements were also met by a wide margin in Q2 2015.

Source: [Posten Norge](#)



# > EUROPE

## UPS OPENS NEW PARCEL HUB IN POLAND

UPS yesterday officially opened a new parcel sorting hub in Poland in its largest investment to date in the country. The company has invested a total of US\$25m in the hub at Strykow, near Lodz in central Poland, and in a Global Business Services centre in Lodz, which already opened in July.

The facility in Strykow functions as a parcel sorting centre and distribution hub for parcels of all sizes. Located near Lodz, the third-largest city in Poland, Strykow was selected by UPS thanks to its central location with close proximity to many national business centres. In addition, the site provides good transport infrastructure improving the connectivity of the UPS network. Strykow is one of the top locations in Poland for courier businesses due to its central location and proximity to Lodz and to major transport routes, according to the property group.

The facility also takes account of freight forwarding needs, including a cross-docking platform and an above-standard number of docks, as well as smaller gates for loading and unloading. As a result, the facility combines the functionalities of a reloading centre and a distribution depot for parcels of various sizes.

Source: [CEP-Research](#)

## POLAND'S INTEGER UPS HALF-YEAR REVENUES 23% AS INTERNATIONAL EXPANSION CONTINUES

Polish-based parcels and mail group Integer.pl generated double-digit growth in the first half of 2015 thanks to higher volumes, a new courier service and more international parcel locker installations.

The group increased revenues by 23% to PLN 336m (€79.3m) in the first six months, with parcel volumes nearly doubling to more than six million parcels and mail volumes totalling 181m. Half-year operating profits (EBITDA) came to PLN 26.5m (€6.25m) and net profits were PLN 11m (€2.6m).

Integer.pl, best-known internationally through the InPost brand, continued its international expansion by installing new parcel lockers in its core markets such as Poland, UK, France, Italy and Canada. The parcel lockers' network in the first half of 2015 increased by 460 lockers and the company plans to deploy a further 1,000 lockers by the end of 2015. The company aims to reach 10% of the courier market segment in Poland by the end of 2017.

Source: [CEP-Research](#)

## RUSSIAN POST H1 REVENUES UP 6%, NET LOSS 18 TIMES LOWER

Russian Post has reported revenues from operational activities in the first half of 2015 totalling RUB 70.3bn (€904.2m), an increase of 6% on the same period last year.

Its net loss was 18 times lower, amounting to RUB 88.2m, compared to RUB 1.6bn a year ago. The postal operator said the loss was due to seasonal factors present in the first half of each year, business activity usually picking up in the second half, allowing positive growth to be achieved for the whole year. Russian Post explained that the improved financial performance of the company was due to increased efficiency and an increase of 7% in the average monthly output per worker to RUB 37,200. An additional boost came from a rise in incoming shipment volumes.

In the first half year of 2015, Russian Post handled 49m international parcels and small packages, 50% more than in the same period last year and almost triple the amount in H1 2013.

Source: [CEP-Research](#)

## > EUROPE

### CORREOS INVESTS OVER €6M IN FLEET UPGRADE WITH 1,367 NEW VEHICLES

Spanish postal operator Correos has increased and renewed its vehicle fleet for another year with a purchase of 1,000 motorcycles and various other vans from different manufacturers counting 1,367 vehicles in total with an investment of over €6m.

These acquisitions are part of the company's measures to renew and its fleet in a homogenous way and expand it, where necessary, to reinforce its shipment distribution services made via vehicles.

Correos will be deploying the 1,367 vehicles from October until the end of this year. Over the coming months, Correos plans to acquire 25 more ecological vans and 100 motorcycles, as part of a bidding process.

Source: [CEP-Research](#)



### FAST CLICK & COLLECT SERVICE FOR SWISS TRAIN PASSENGERS

Swiss train passengers heading for Zurich can now order goods online via their smartphone and pick them up as little as 30 minutes later from parcel lockers at the city's central train station.

Swiss Railways (SBB), Swiss Post and leading food retailer Migros launched tests of an innovative click & collect scheme offering quick, convenient and simple deliveries for public transport users through a 'unique' 30-minute delivery service. Passengers can choose from 1,000 common Migros products offered through the 'SBB SpeedyShop' website and pay by credit card. The products are then delivered 30 minutes later to the MyPost24 parcel terminals at Zurich train station ready for collection. Passengers receive an e-mail with a QR code that they can use to open the locker.

The three companies said that the SBB SpeedyShop will be tested in a nine-month pilot phase at Zurich train station. If the project proves successful, the service will then be expanded with additional partners and more train stations.

Source: [CEP-Research](#)

### SWISS POST PROMOTES E-VOTING

Neuchâtel becomes the first partner canton for Swiss Post's e-voting platform. The canton of Neuchâtel will begin collaboration to implement Swiss Post's second-generation e-voting platform already in 2016. The new platform is designed to meet the stringent federal requirements to be permitted to be used by all voters. It is an improved version of the previous system, which only 30% of the voting population in the canton of Neuchâtel was permitted to use.

Source: [Swiss Post](#)

### SWISS POST ACHIEVES ENCOURAGING RESULT IN DIFFICULT ENVIRONMENT

Swiss Post released the figures for the first half of the 2015 financial year, reporting encouraging results. In the first half of 2015, Swiss Post generated normalised Group profit of CHF 391m. At CHF 504m, normalised operating profit (EBIT) was up slightly year on year. This increase is principally due to solid income on the financial and investment markets despite the ongoing low interest rate situation, as well as to good cost management. The improved result is principally due to solid income on the financial and investment markets, which offset lower interest income, as well as to good cost management.

## > EUROPE

Operating income remained relatively stable at CHF 4.1bn.

The financial services market's normalised contribution to the result proved higher than in the first half of the previous year, whereas the contributions from the other markets declined.

In the communication market, Swiss Post recorded a normalised operating profit (EBIT) of CHF 137m. The decline in income at PostMail and Post Offices & Sales caused by lower volumes could not be offset, despite a reduction in expenses in all the units within this market. In the logistics market, Swiss Post recorded a normalised operating profit (EBIT) of CHF 65m, virtually on a par with the previous year's level. PostFinance, which operates in the financial services market, achieved a normalised operating profit (EBIT) of CHF 280m, which represents an increase of CHF 50m year on year.

Source: [Swiss Post](#)

### EX-TNT POST WHISTL OPENS SCOTTISH 'SUPER DEPOT'

Whistl, the second-largest postal operator in the UK, has officially opened its new Scottish depot.

The company moved its existing Coatbridge operations to a 'Super Depot' in Tannochside, Uddingston, triple the size of its former home. The Tannochside depot is highly automated and the site employs 150 people in a wide range of jobs including operations and transport. It has developed roles for young people starting out in work through the Whistl apprenticeship scheme, the statement added.

Formerly known as TNT Post, Whistl has operated in Scotland over the past nine years and collects and sorts an average of 2m items of mail a week before handing over to Royal Mail for delivery. Across the UK, the company handles 3.75bn items of mail per year.

Source: [CEP-Research](#)

### UK ONLINE RETAIL POSTS DOUBLE-DIGIT GROWTH IN JULY

UK online retail sales continued to post 12% year-on-year growth in July, confirming the recovery from a slow start to the year, according to the latest IMRG Capgemini e-Retail Sales Index.

Strong mobile phone sales boosted the overall performance. The m-commerce sector, which comprises sales via smartphones or tablet devices, continued to grow strongly, increasing 42% last month on July 2014.

However, sales growth in the electrical sector was disappointing, up just 5% year-on-year in July, in keeping with the low single-digit increases recorded so far this year. Between January and July, the sales of electrical goods increased by 3% on average, compared to 15% during the same period last year. In contrast, the index was boosted by a strong performance in the clothing sector which recorded 14% growth last month.

Source: [CEP-Research](#)



# ABOUT THIS PUBLICATION

IPC MARKET FLASH is a fortnightly newsletter providing a comprehensive look at new developments emerging in the international postal marketplace. It is published by the Marketing department of International Post Corporation.

If you would like to contribute to this publication or require further information, please contact: [publications@ipc.be](mailto:publications@ipc.be).

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International Post Corporation (IPC) is the leading service provider of the global postal industry that provides leadership by driving service quality, interoperability and business-critical intelligence to support posts in defending existing business and expanding into new growth areas. It is a cooperative association of 24 member postal operators in Asia Pacific, Europe and North America. IPC's solutions and services are used by over 180 posts worldwide. Since 1989 IPC has set standards for upgrading quality and service performance and developed technological solutions that help members enhance service for international letters, packets and parcels. IPC engages in industry research, creates business-critical intelligence, provides a range of platforms and programmes for member post CEOs and senior management to exchange best practices and discuss strategy. IPC also manages the system for incentive-based payments between postal operators.

For more information please visit our website [www.ipc.be](http://www.ipc.be) or contact us at [info@ipc.be](mailto:info@ipc.be).

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