



Statistics Sweden

Statistiska centralbyrån

Turnover Postal and Courier Activities in Sweden

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Outline of presentation

- Part 1: Definition of service being collected
- Part 2: Market conditions
- Part 3: Turnover data method



Part 1: Definition of service being collected



Part 1: Definition of service

- NACE 53: *Postal and Courier Activities*
- Swedish classification divided into:
 - Postal Activities under Universal Service Obligation (NACE 53.10)
 - Other Postal and Courier Activities, (NACE 53.20)
 - Other Postal Activities (53.201)
 - Courier Activities (53.202)
 - Newspaper Distribution (53.203)

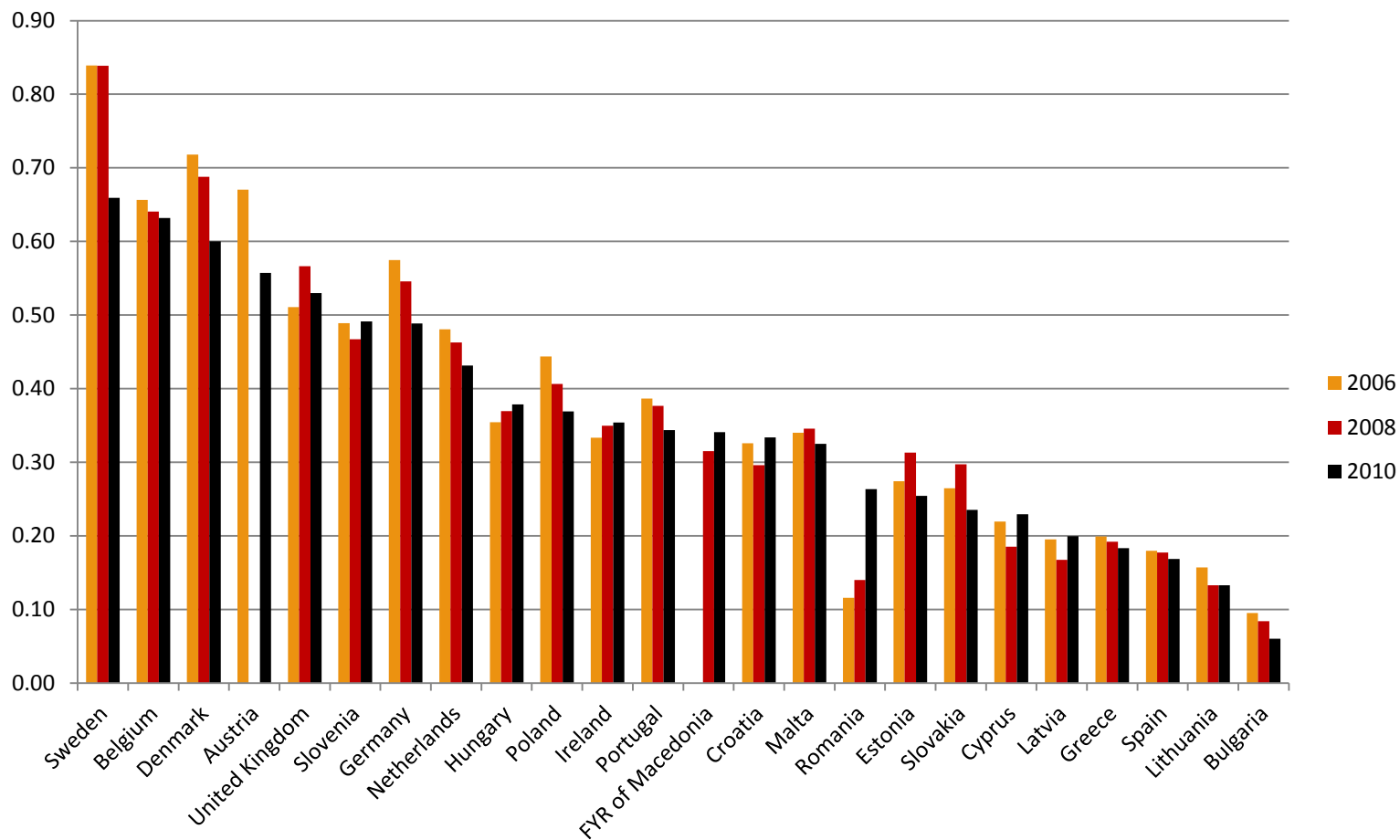


Part 2: Market conditions

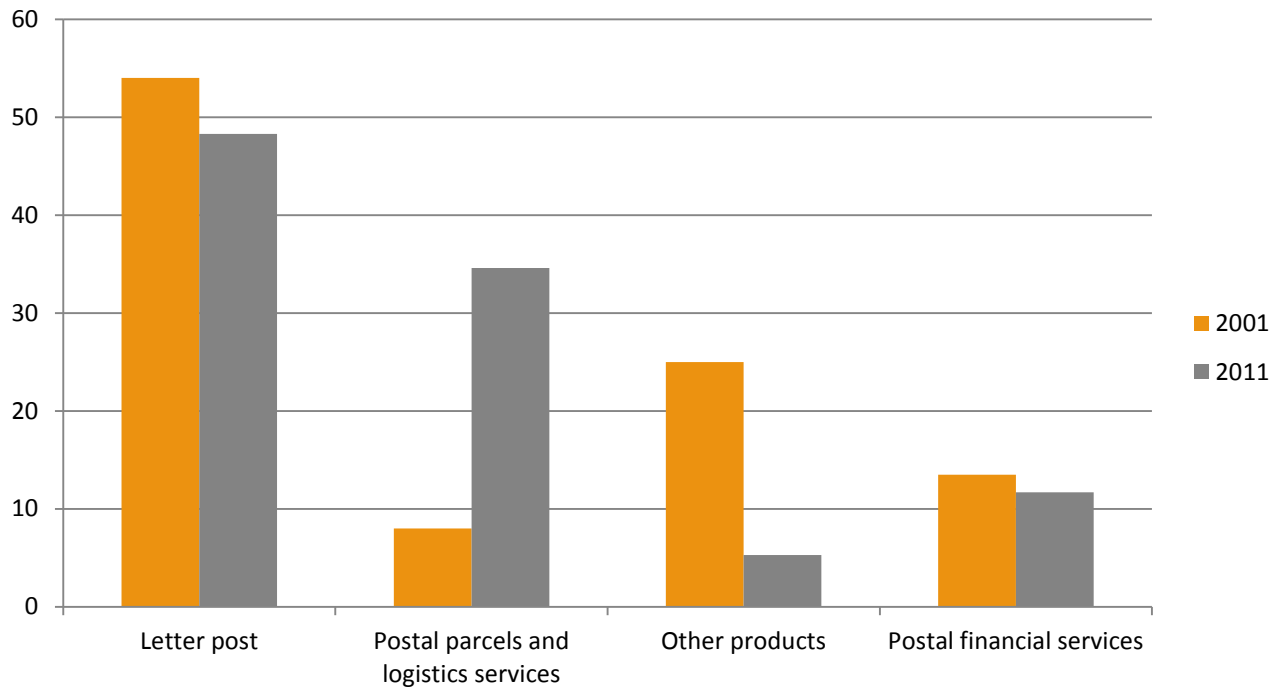


Domestic turnover (% of the GDP)

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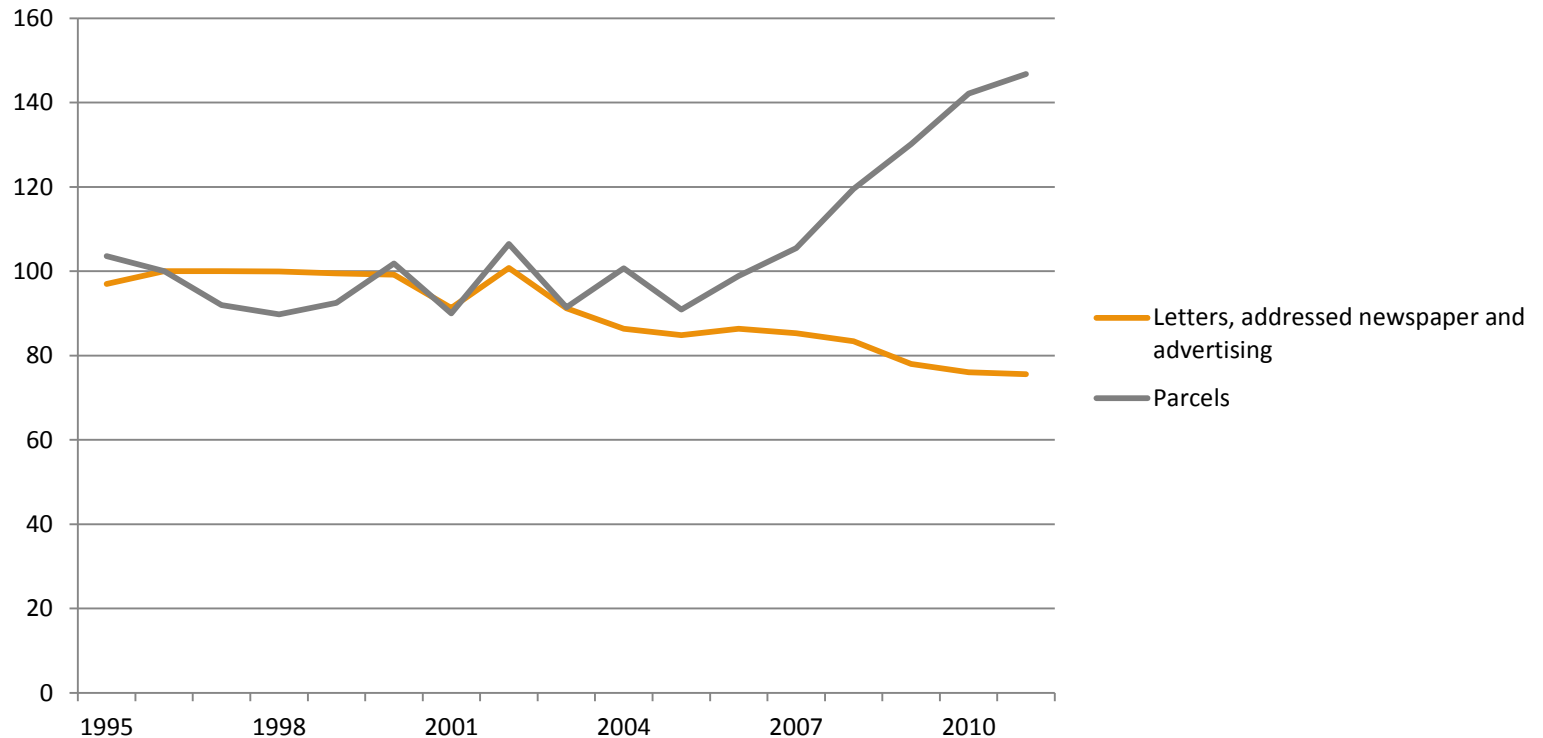


International postal market by type of service (%).



Traffic volume in Sweden

- Traffic volume letters, parcels 1995-2012, Index 1996=100



History for Postal services in Sweden



- **Post farmers and mail carriers.** (Well into the 20th century)
- **Horse** (1831 to 1888)
- **Bicycles** (late 1800s -)
- **Railways** (first railway in Sweden opened in 1856 and all Swedish second-class mail has been sent by rail since 2001)
- **By water** (Steamboats 1840s. Steamboat sub post offices 1869. Today, a great deal of Swedish mail is transported by boat.)
- **Automobiles** (1903 -)
- **By air** (By unmanned balloons, 1808-09. By Airplane, 1920 -)



Postal Activities in recent times

- The Swedish National Post Office's monopoly in Sweden terminated on 1st of January in 1993
- A new Postal Law was put into place in 1994 (permission is required)

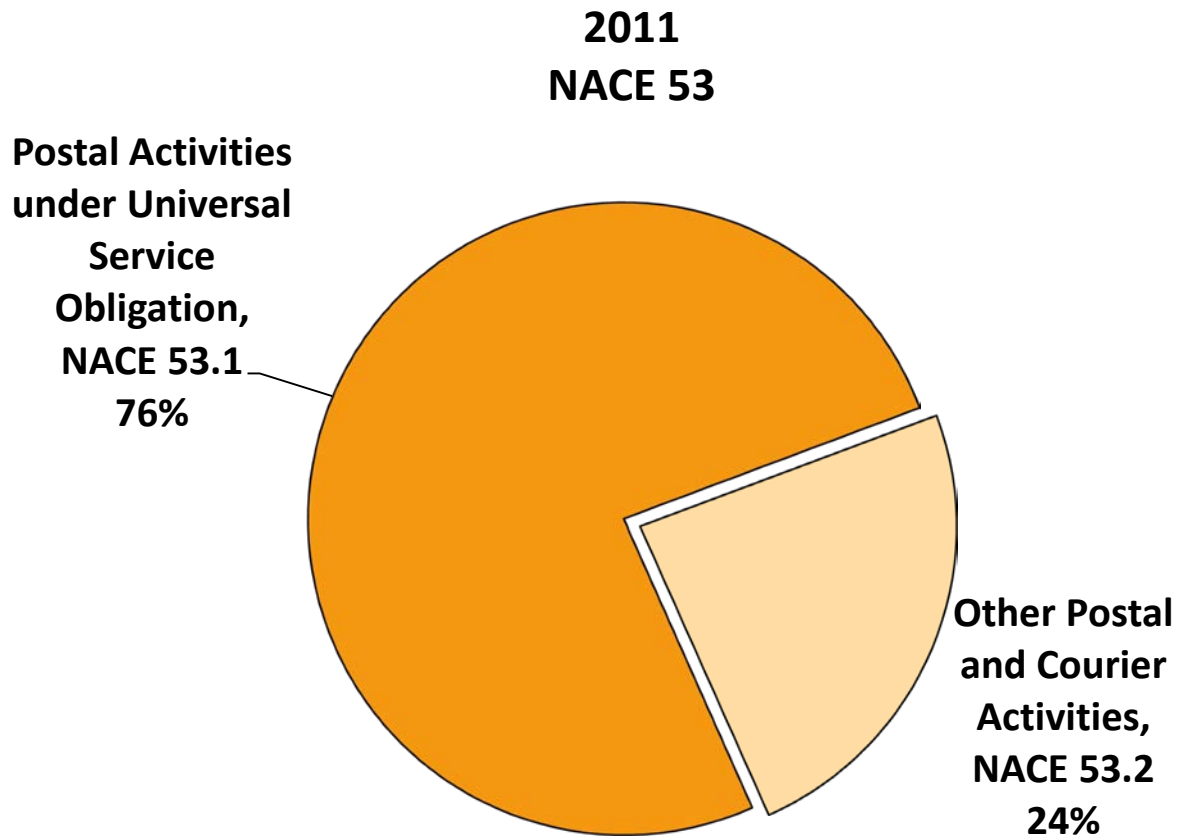


Postal Activities in recent times

- 1994, the Swedish National Post Office was at the same time converted into Posten AB, a limited liability company
- 2009, to meet the increasing competition, Posten AB and Post Danmark A/S decided to merge into PostNord AB

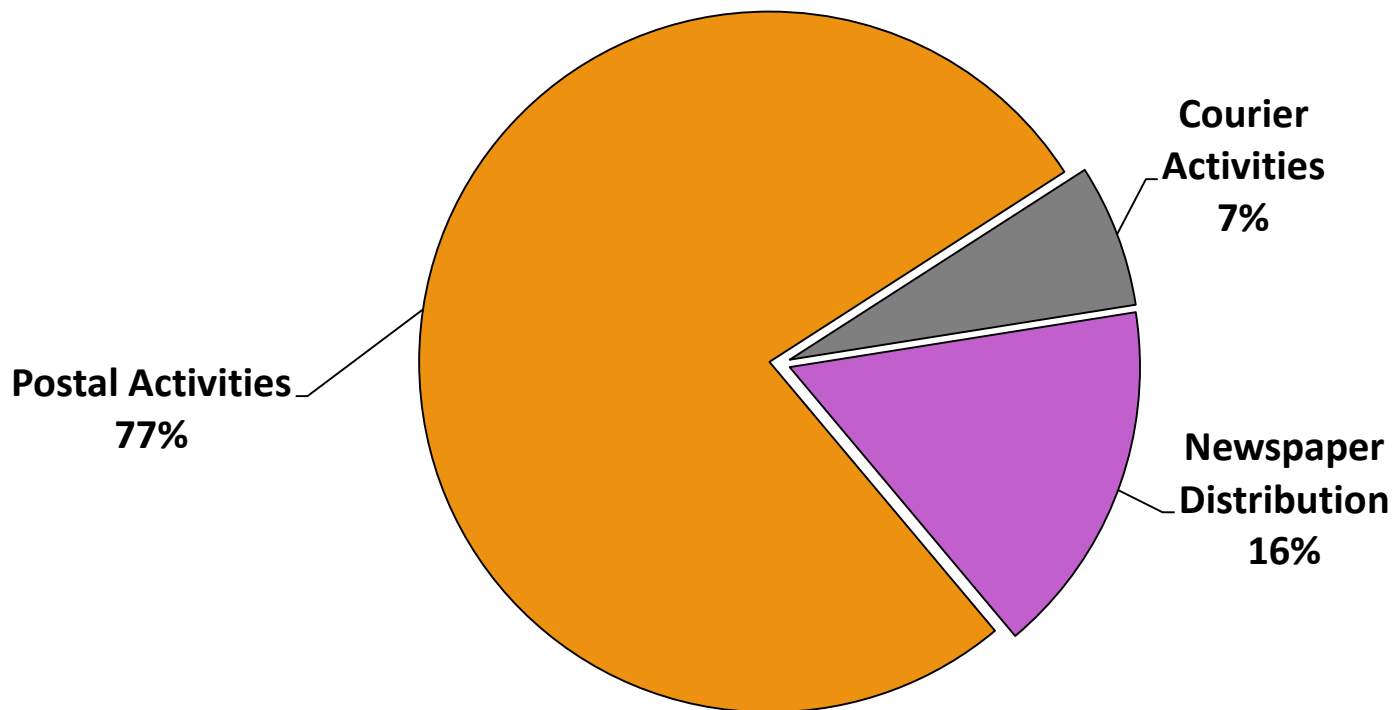


Turnover by NACE group



Turnover by type of activities

2011

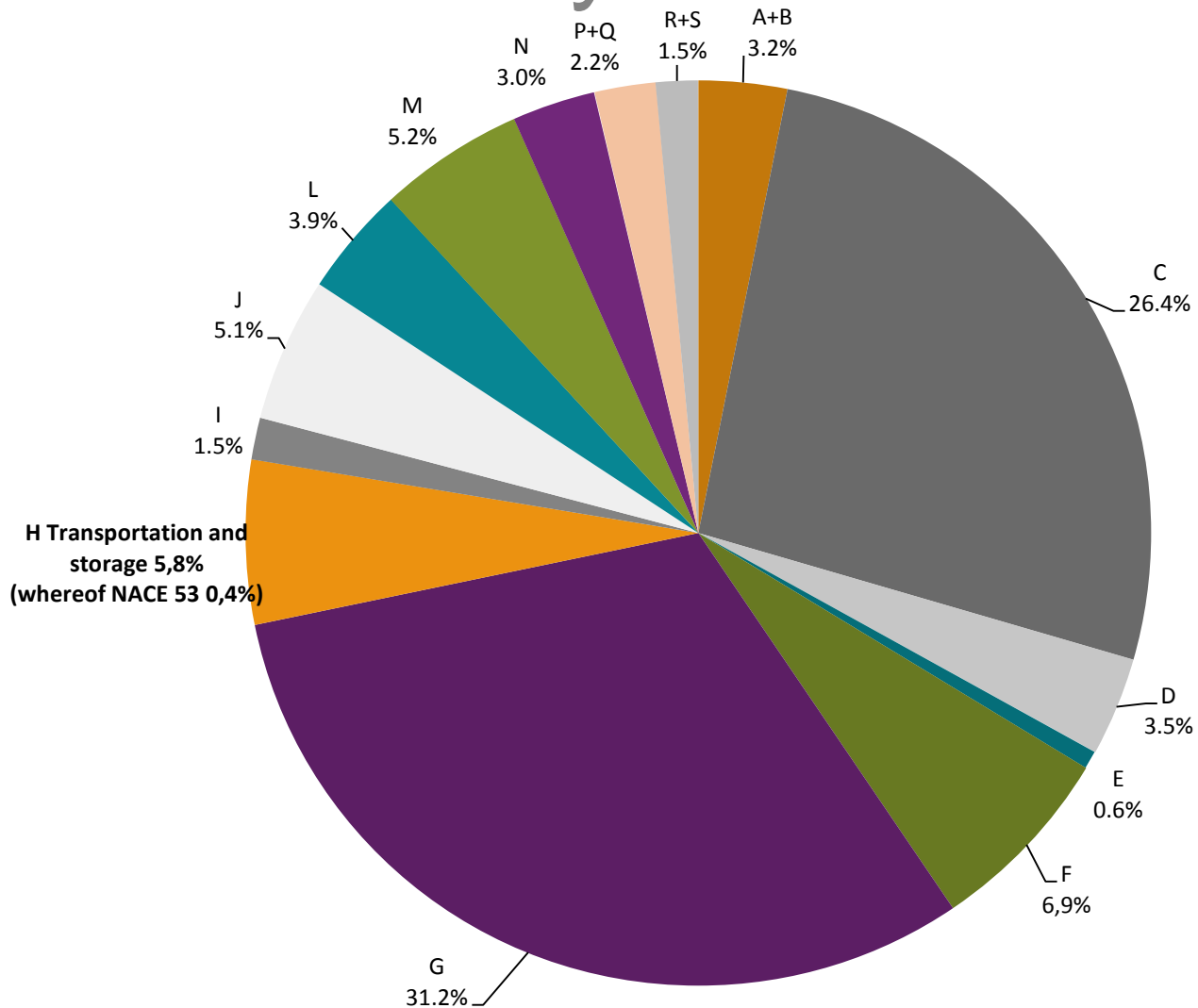




Turnover by NACE section

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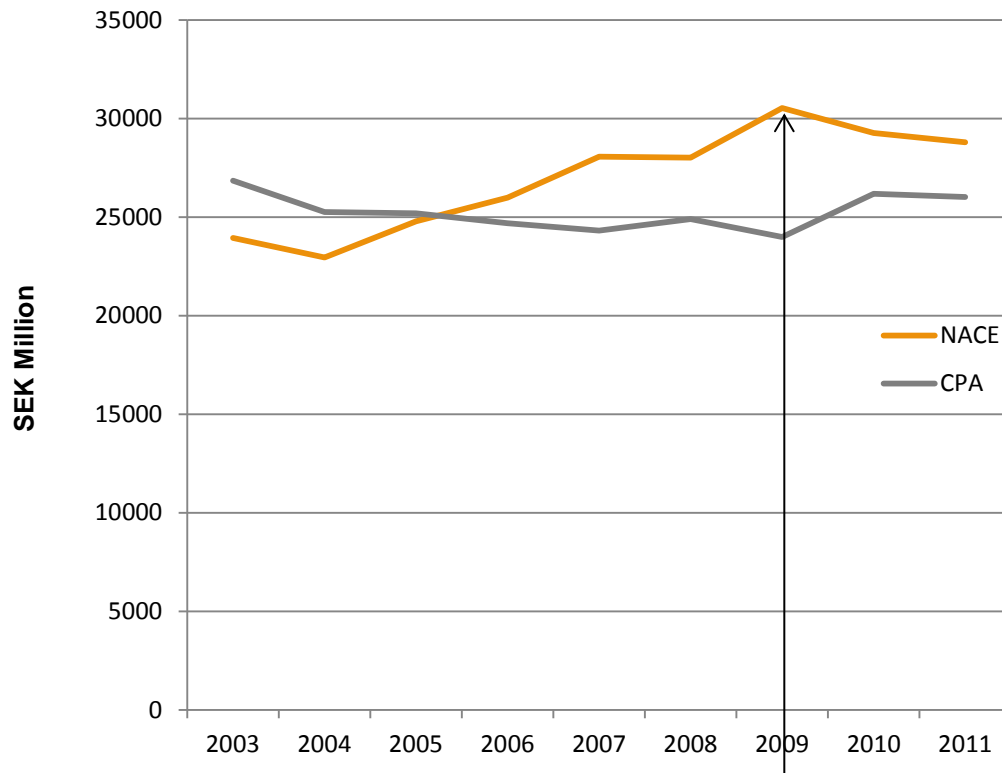


Comparision to Swedish GDP

- Swedish GDP grew considerably during the years after the financial crisis (2009-2011)
- The development in the postal market has not been that positive
- A key factor is the trend to substitute physical with electronical communication



Turnover by division and product



A large company was added to the Postal and Courier Activities due to reclassification but their turnover was still reported on a CPA belonging to their old classification.



Market conditions

- NACE 53
 - NACE 53.1 is, by far, the greatest division within this sector with over 75% of the turnover and the employees
 - Legislation: To carry out Postal Activities (53.1 and 53.201) a permission from the Swedish Post and Telecom Authority is required
 - Since PostNord, the old Swedish National Post Office's, has a long history and a wide network, it is difficult for other enterprises to enter the market

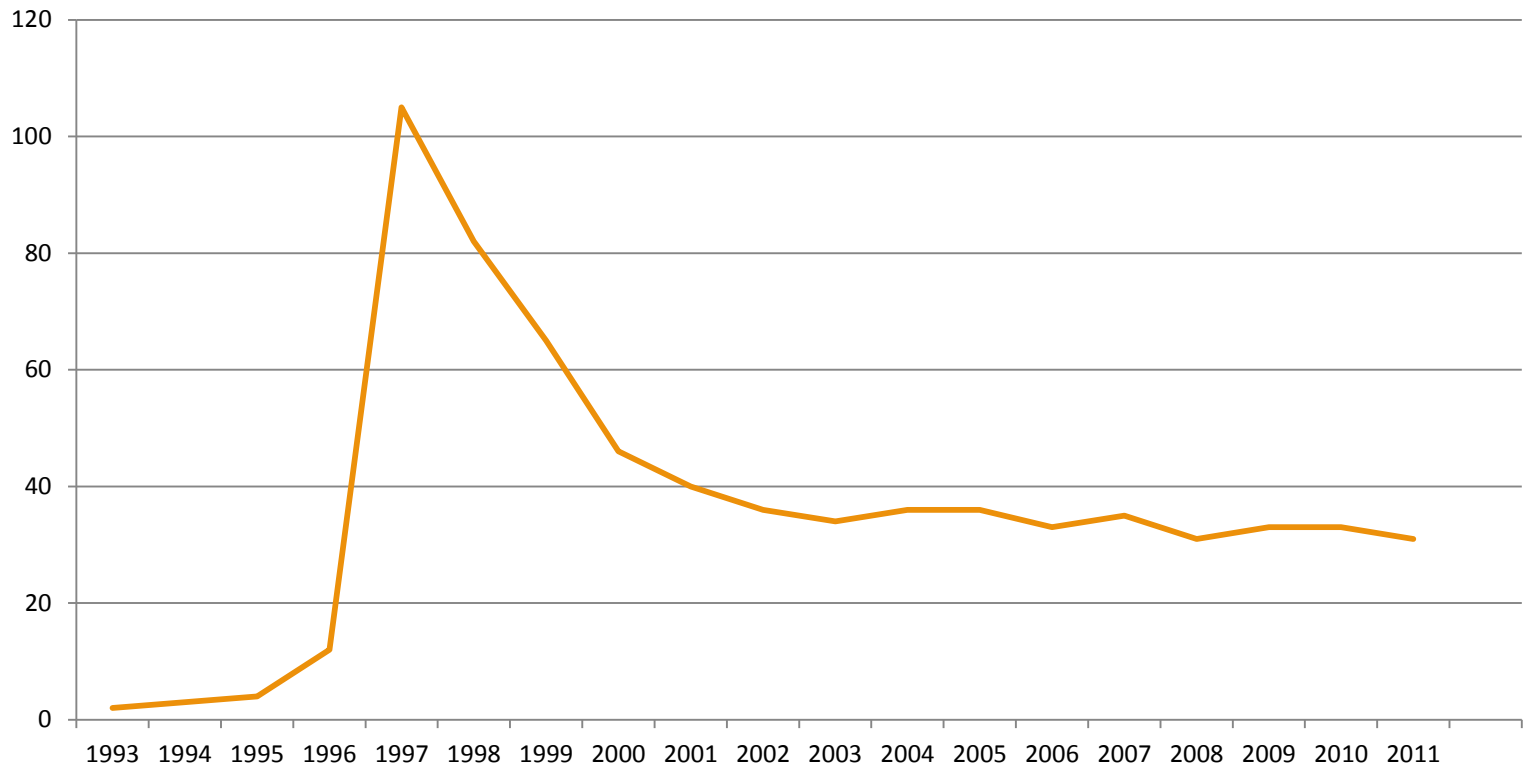




Market conditions

**Number of enterprises with permission to deliver post on
December 31, 1993-2011.**

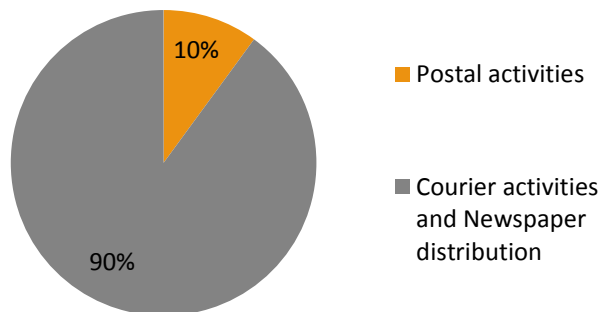
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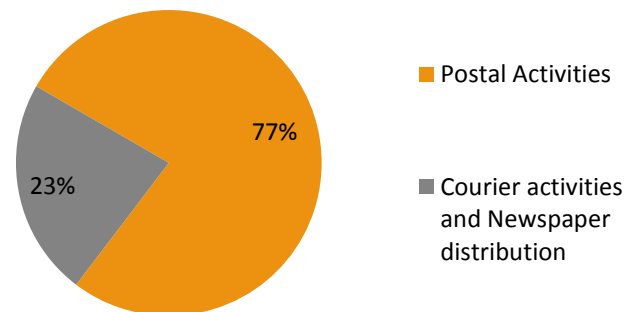
Market conditions

- Courier Activities and Newspaper Distribution industry is more competitive. They account for 90% of the enterprises in NACE 53 but slightly over 20% of the turnover in 2011

Number of enterprises



Turnover



Part 3: Turnover data method





Short-Term Statistics (STS)

- Service production index
- Quarterly and monthly statistics, only turnover
- EU-regulated survey
- Sample survey
- Results presented as development indices, released t+35 days
- Data in NACE Rev2 2000-
- No admin data used at present



Structural Business Statistics (SBS)

- EU-regulated survey
- Based on administrative (tax) data
 - 600 largest enterprises surveyed separately (one enterprise within NACE 53)
 - Sample 17 000 enterprises for turnover by product (23 enterprises within NACE 53)
- Transmission to NA t+15 months
- Preliminary results delivery to Eurostat t+10 months, definitive t+18 months



SBS

- Turnover by products within NACE 53:

Variable	CPA 2008	Name
v1887	53	Postal services, courier business and newspaper distribution

- 91% in NACE 53, is located on this product (5% in a CPA belonging to NACE 49, land transportation)
- No other NACE division has reported on this product





Survey, Postal services 2012

- Statistics Sweden cooperates with Transport Analysis (TRAFA) and the Swedish Post and Telecom Authority
- Since 1995
- Terms of infrastructure, operators, traffic volume and economic values
- Dissemination in June t+1



Survey, Postal services 2012

- Comprehensive survey of enterprises operating in *Postal and Courier Activities* during a year
- Population 333 enterprises
- Four different questionnaires
 - Postal Activities, SNI 53.100 and SNI 53.201
 - PostNord AB and City Mail Sweden AB both got comprehensive individual questionnaires
 - One for the other enterprises with a Swedish Post and Telecom Authority permit (less comprehensive)
 - Less comprehensive questionnaire for enterprises with Courier Activities (SNI 53.202) and Newspaper Distribution (SNI 53.203)



Survey, Postal services

- Data from 2012 is available.

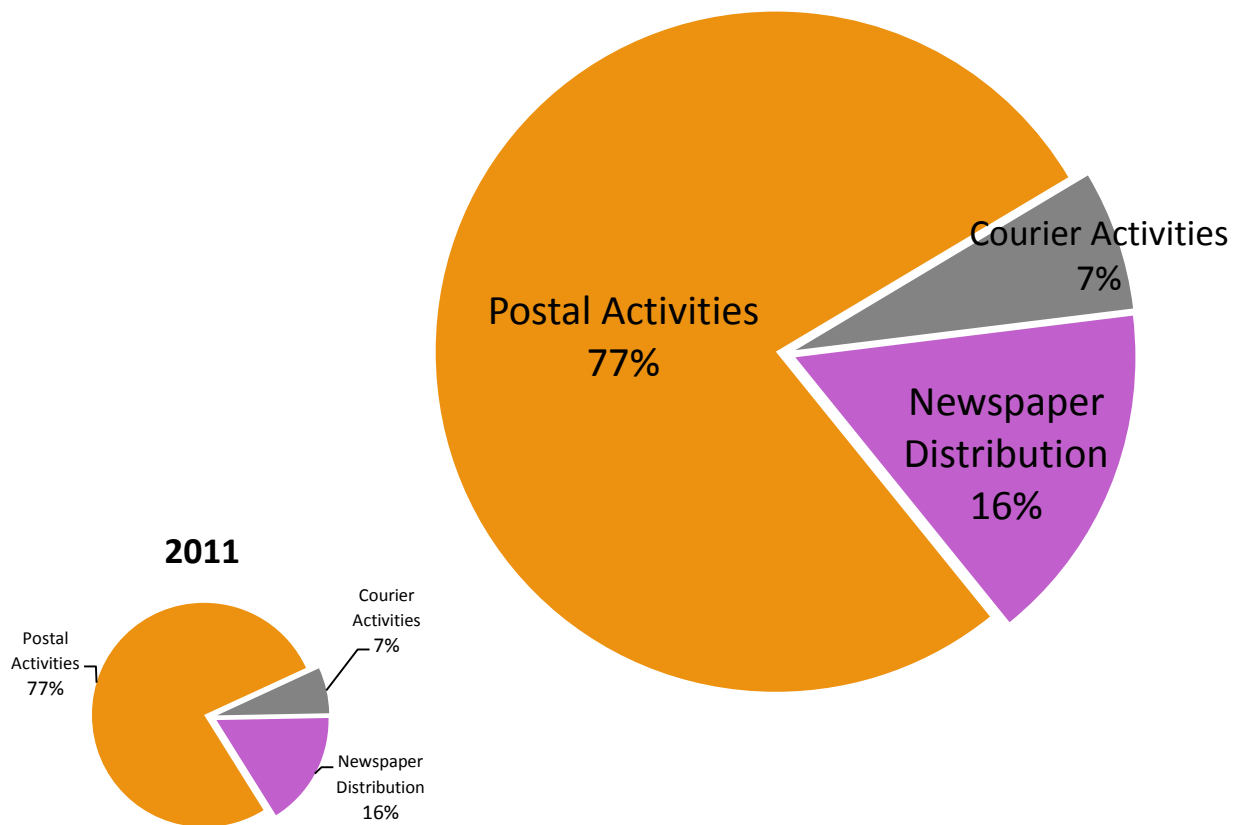
Variable	Postal activities	Courier Activities	Newspaper distribution	Total
	NACE 53.1+ SNI53.201	SNI 53.202	SNI 53.203	NACE 53
No. of enterprises	39	272	22	333
No. of employees	23 736	1 317	5 658	30 711
Turnover SEK Million	21 994	1 882	4 587	28 794





Turnover by type of activities 2012 (%).

Turnover 2012





Thank you for your attention!

