

The Swedish Parcel Market 2022

Report based on the Swedish Post and Telecom
Authority's collection of parcel statistics in June 2023

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Preface

The Swedish Post and Telecom Authority (PTS) is responsible for monitoring the developments in the postal market, ensuring that postal services meet society's needs, and promoting effective competition in the market. Since 2018, PTS is the designated national regulatory authority for Regulation (EU) 2018/644 of the European Parliament and of the Council of 18 April 2018 on cross-border parcel delivery services ("EU Parcel Regulation"). Since the coming into force of this regulation, the PTS has gained increased powers to collect data from companies operating in the Swedish parcel market. The purpose of this report is to describe the developments in the Swedish parcel market in 2022 in terms of growth and market concentration.

In summary, PTS concludes that domestic parcel distribution has seen moderate growth in 2022, while cross-border volumes have declined. These developments reflect the economic downturn, global events such as the war in Ukraine, as well as the fact that 2022 is the first year post the COVID-19 pandemic, during which parcel distribution increased significantly. PTS also notes that the market appears to have entered a more mature phase in 2022, with a higher degree of consolidation of existing companies in the market.

Dan Sjöblom
Director General

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1. Introduction

1.1 About the statistics

The Swedish Post and Telecom Authority (PTS) collects, annually in June, statistics from parcel delivery service providers operating in the Swedish parcel market, in accordance with the EU Parcel Regulation¹. The data include statistics on volumes and turnover.

The statistics in this report were collected in June 2023 and refer to the calendar year of 2022. This year's collection covers 25 individually registered companies². The difference from the previous year (27 companies) is that a couple of companies have merged during the year (FedEx and TNT have merged into FedEx Express; Instabox and Budbee have merged into Instabee).

Data for businesses within the same corporate group have been aggregated up to the main company. This includes the ten distributors within Early Bird³ as well as DHL Freight and DHL Express. FedEx and TNT have been aggregated in each of the available years to Fed Ex Express. Instabox and Budbee have been aggregated for the year of 2022 to Instabee. After this aggregation, 15 companies remain and which are included in the market analysis.

During 2022/23, PTS has undertaken a review and streamlined the Authority's collection of parcel statistics. Previously, statistics on business segments (B2C, B2B, C2X) as well as volumes by postcode were collected through a separate data collection in January, which only covered the ten largest companies and only parcels up to 20 kg. From 2023 onwards, PTS instead collects all parcel statistics in June, which means that the June data collection now includes all parcel delivery service providers and parcels up to 31.5 kg. This means that data by business segment in this year's collection is not comparable with previous years. A key reason for implementing these changes is to reduce the overall administrative burden for businesses in the parcel market and to ensure a higher level of quality assurance of the data.

PTS has as usual engaged in in-depth dialogue with the companies in the market as part of the the quality assurance process. As both PTS and the parcel delivery service providers gain a better understanding of the market and the requested statistics, some revision of historical data has by necessity been carried out. The latest published report always contains the most accurate and most up-to-date data.

1.2 Definitions and description of submarkets

The statistics in this report follow the definitions laid down in the EU Parcel Regulation and the Commission Implementing Regulation⁴:

- **Parcel:** A postal item containing goods with or without commercial value, other than an item of correspondence, with a weight not exceeding 31.5 kg
- **Domestic parcel delivery services:** Both the sender and the recipient are located in Sweden
- **Incoming cross-border parcel delivery services:** The sender is located outside of Sweden, the recipient is located in Sweden
- **Outgoing cross-border parcel delivery service:** The sender is located in Sweden, the recipient is located outside of Sweden

In addition, PTS uses the term “**parcel letter**”, which refers to services up to 2 kg, intended for the distribution of goods or objects, and which are distributed through the traditional postal services network via letter carrier or distributors of newspapers and advertising materials. The definition of “parcel” in the first bullet point above also includes parcel letters.

Based on these definitions, PTS analyses the following five submarkets:

- **Total market:** the sum of domestic, incoming and outgoing parcel delivery services
- **Parcels distributed in Sweden:** the sum of domestic and incoming parcel delivery services
- **Domestic parcels** – domestic as per the definition above
- **Incoming parcels** – incoming as per the definition above
- **Outgoing parcels** – outgoing as per the definition above

With respect to the market segment “parcels distributed in Sweden”, PTS undertake further analysis of the following three business segments:

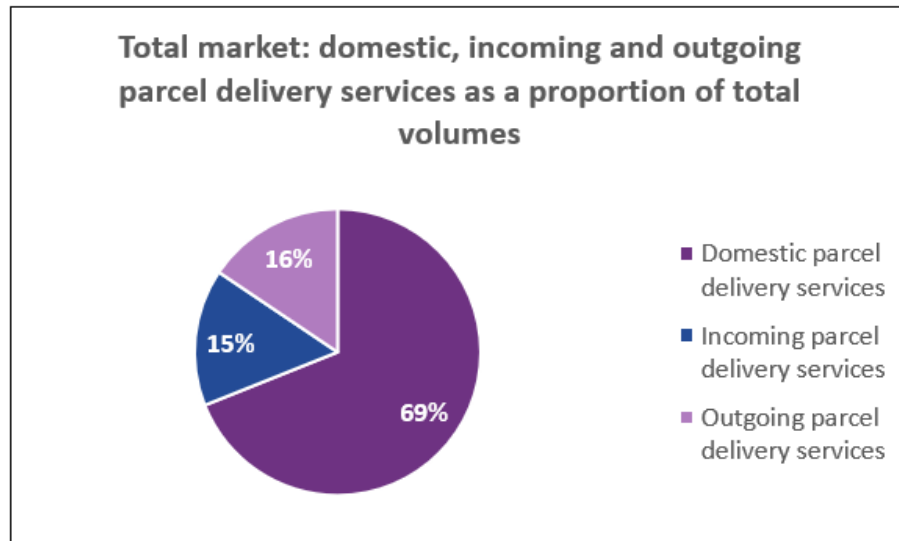
- **B2C market:** business-to-consumer parcels, e.g. distribution to consumer of goods that have been purchased online.
- **B2B market:** business-to-business parcels. This data collection covers single piece consignments of business parcels below 31.5 kg.
- **C2X market:** parcels sent from consumers to “any recipient”, e.g. from an individual to family and friends, from consumer to consumer following sales via an online marketplace, and consumer to business returns of items purchased online (it should however be noted that the latter is rarely registered as a C2X flow by parcel delivery service providers).

2. Submarkets, business segments and market growth

2.1 Parcel market submarkets

The largest submarket in the Swedish parcel market is domestic parcel delivery services (69% of total number of parcels distributed), followed by outgoing cross-border parcel delivery services (16%) and incoming cross-border parcel delivery services (15%). The proportion of each submarket has remained relatively unchanged since 2018.

Figure 1: Total market: Domestic, incoming and outgoing parcel delivery services as a proportion of total volumes

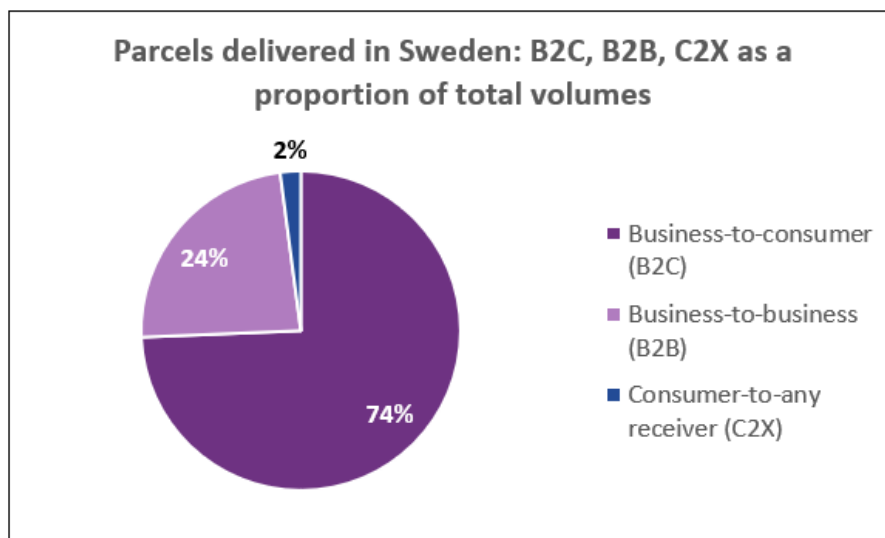


2.3 Business segments

The submarkets “domestic parcel delivery services” and “incoming parcel delivery services” can be aggregated into the market for “parcels delivered in Sweden” (see definitions in Section 1.2).

In the market “parcels delivered in Sweden”, B2C parcels (including parcel letters) constitute the largest business segment (74% of total volumes), followed by B2B parcels (24%) and C2X parcels (2%). Since 2018, the proportion of C2X has remained relatively unchanged, B2B has decreased slightly, whereas B2C’s proportion of total volumes has increased in line with the continued growth of e-commerce.

Figure 2: Parcels delivered in Sweden: B2C, B2B and C2X as a proportion of total volumes



2.2 Parcel market volumes, turnover and growth (2022)

In 2022, approximately 337 million parcels were distributed in the total parcel market, of which 285 million were parcels distributed in Sweden. Domestic parcel delivery services amounted to 232 million parcels, incoming to 52 million parcels, and outgoing parcel delivery services to 53 million parcels (see definitions in section 1.2).

In terms of turnover, the total value of the market amounted to SEK 21.8 billion in 2022, of which SEK 15 billion related to parcels delivered in Sweden. Domestic parcel delivery services amounted to SEK 12 billion, incoming to SEK 3 billion, and outgoing parcel delivery services to SEK 6.8 billion.

Table 1: Parcel market turnover, volumes and growth in 2022

Delmarknad:	Outcome 2022		Growth 2021-2022	
	Turnover (bn SEK)	Volumes (million)	Turnover	Volumes
Domestic parcels	12.0	232	5%	4%
Incoming parcels	3.0	52	0%	-3%
Outgoing parcels	6.8	53	2%	-5%
Distributed in Sweden	15.0	285	4%	3%
Total market	21.8	337	3%	2%

Note: "Total market" = domestic + incoming + outgoing parcels. "Distributed in Sweden" = domestic + incoming

In 2022, the total parcel market grew by around 3% in terms of turnover and 2% in terms of volumes. The totals conceal two opposing trends: during the year, domestic parcel distribution has increased moderately, in terms of both volumes and turnover, while cross-border volumes have seen a decline:

- All parcels delivered in Sweden: turnover +4%, volume +3%
- Domestic parcels: turnover +5%, volume +4%
- Incoming parcels: turnover: 0%, volume -3%
- Outgoing parcels: turnover +2%; volume -5%

Compared to the strong growth of the parcel market during the COVID-19 pandemic (2020–21), there is a more moderate development in 2022, which has been affected by a range of factors such as the economic downturn, high inflation, rising interest rates, the weaker exchange rate, as well as global events such as the war in Ukraine.

3. Market concentration

3.1 Indicators of market concentration

3.1.1 Market shares

Market shares are usually calculated on the basis of value, which is considered to be a good estimate of a business' general ability to overcome obstacles in the market and offer products which consumers find attractive. The exception is where a market is characterized by very homogenous products, where market shares based on volumes may give a more accurate picture. In a homogenous market, products are similar; a cheap product can easily replace a more expensive product. In such a market, a business that offers a new, substantially cheaper product, can have a large competitive impact, even if it does not earn large revenues.² In order to present a complete picture of the market, this report presents market shares both in terms of turnover and volumes.

3.1.2 The concentration ratio

The concentration ratio is the sum of the market shares of the n largest businesses in the market. A common measure is the concentration ratio of the four largest businesses (often called CR4). If CR4 exceeds 60 %, then the market is often categorised as an oligopoly, with or without a dominant firm. If CR1 (i.e. the market share of the largest company) exceeds 90 %, then the market is usually classified as a monopoly.⁴

Table 2: Interpretation of the CR4-ratio

Index value	Interpretation CR4 ratio
CR4 = 0	Perfect competition
0 < CR4 < 40	Effective competition or monopolistic competition
40 <= CR4 < 60	Loose oligopoly or monopolistic competition
60 <= CR4	Tight oligopoly or dominant firm with competitive fringe
90 >= CR1	Effective monopoly (near monopoly) or dominant firm with competitive fringe

3.1.3 Herfindahl-Hirshman Index

Herfindahl-Hirschmann Index (HHI) is a measure of market concentration, which is calculated as the sum of the squared market shares in the market. An increase in the

index is usually interpreted as an increase in market concentration, i.e. a decrease in competition, but needs to be interpreted in its context, as such an increase may also reflect a reallocation of market shares towards more efficient businesses. ⁵

An HHI value below 1500 (15 %) is usually interpreted as low market concentration; a value between 1500 and 2500 (15 – 25 %) as moderate concentration; and a value that exceed 2500 (25 %) as high concentration. The maximum value that the index can take is 10000, which reflects 100 % concentration, i.e. monopoly. ⁶

Table 3: Interpretation of the Herfindahl-Hirschman Index

Index value	Interpretation of the HHI
<15%	Low concentration
15%-25%	Moderate concentration
>25%	High concentration
100%	Max = monopoly

3.1.4 Instability Index

Instability index is a measure of the change in the relative position of the companies in the market and is often used as a measure of the intensity of competition. The index is calculated as the sum of the absolute change in market shares over a time period. If the index value is close to zero it indicates that the allocation of the market shares is relatively stable, if close to one, that the allocation is relatively instable. The higher the value of the index, the higher the intensity of competition. ⁷

3.2 Market concentration: total market

There are 15 businesses operating at the level of the total market (see definitions in 1.2), of which 9 individually has a market share exceeding 1 %.

Postnord is the largest actor (35–40 % of the market, in terms of turnover), followed by two companies with 10–15 % (UPS, DHL), four companies with 5–10 % (Schenker, Bring Parcels, FedEx Express, Instabee), and two companies with 1–5 % (Early Bird, Airmee).

Table 4: Market shares and concentration – total market

Parcel delivery operator	Market share (turnover)		Parcel delivery operator	Market share (volume)	
	Total market			Total market	
Postnord	35-40%	-1	Postnord	45-50%	-2
UPS	10-15%	0	Instabee	10-15%	3
DHL	10-15%	0	DHL	5-10%	0
Schenker	5-10%	-1	Bring Parcels	5-10%	0
Bring Parcels	5-10%	1	Schenker	5-10%	-1
FedEx Express	5-10%	-1	UPS	1-5%	0
Instabee	5-10%	1	Early Bird	1-5%	0
Early Bird	1-5%	0	Airmee	1-5%	1
Airmee	1-5%	0	FedEx Express	1-5%	0
6 operators individually < 1%	ca 3% combined	--	6 operators individually < 1%	ca 2,5% combined	--
HHI	21%	↓ (22%)	HHI	28%	↓ (30%)
CR4 (four largest)	74%	↓ (75%)	CR4 (four largest)	78%	↑ (76%)
Instability index	7	↓ (8)	Instability index	8	↓ (14)

Note: Changes in percentage points; green marking: "improvement"; red marking: "worsening"

Compared to the previous year, Bring Parcels and Instabee in particular have strengthened their position (about one percentage point each), while Postnord, Schenker and FedEx Express have dropped slightly (about one percentage point each). The position of the remaining operators is relatively unchanged, with either a marginal increase (green) or decrease (red) of less than one percentage point.

The HHI shows a value of 21%, which implies a moderate degree of market concentration, which has decreased by one percentage point over the year. The CR4 ratio is 74%, indicating an oligopoly market, in this case with one dominant company. The CR4 decreased by one percentage point over the year, indicating that the smaller companies in the market have strengthened their position somewhat against the larger ones. The instability index shows a value of 7, i.e. seven percentage points of market share have been reallocated during the year, which is slightly lower than the previous year.

A comparison of market shares calculated based on turnover compared to volume shows that some companies have a higher market share based on turnover (UPS,

DHL, FedEx), while the opposite is true for two companies (Postnord, Instabee). This may be interpreted as a reflection of differences in the composition of supply, where some companies (such as UPS, DHL and FedEx) to a larger extent have differentiated products for which they can charge a higher price, e.g. a stronger focus on the business sector and/or premium products.

Looking at the development of the competition indicators over time shows that the market is more concentrated when the indicators are calculated based on volume rather than turnover, but that concentration based on volume has decreased at a faster pace over time. Over the period 2018–2022:

- The HHI decreased by 3 percentage points in terms of turnover, 11 percentage points in terms of volume
- The CR4 decreased by 7 percentage points in terms of turnover, 12 percentage points in terms of volume
- Postnord's market share decreased by 4 percentage points in terms of turnover, 10 percentage points in terms of volume

Changes in the number of active companies and the market shares being reallocated each year can be seen as indicators of the intensity of competition in the market. The values of both of these indicators have increased over time, but stabilised in 2022, reflecting the merger of Budbee and Instabox.

Table 5: Development of the concentration and competition indicators over time

Measure:	Total market (turnover)						Total marknaden (volume)					
	2018	2019	2020	2021	2022	2018-22	2018	2019	2020	2021	2022	2018-22
HHI	25%	24%	23%	22%	21%	-3	39%	37%	32%	30%	28%	-11
CR4	81%	81%	78%	75%	74%	-7	90%	89%	82%	76%	78%	-12
Postnord	40-45%	-1	-1	-1	-1	-4	55-60%	-2	-4	-2	-2	-10
I-index	--	4	5	8	7	3	--	4	9	14	8	4
No. businesses	13	13	16	16	15	2	13	13	16	16	15	2

Note: HHI = Herfindahl Hirschmann Index; CR4 = combined market share of the four larges; I-index = Instability index

3.3 Market concentration: parcels delivered in Sweden

There are 14 operators in the market for parcels delivered in Sweden (see definitions in 1.2), of which 10 operators individually has a market share exceeding 1 %.

Postnord is the largest operator, with a market share of 45–50 % in terms of turnover. Next is DHL, with a market share of 10–15 %, followed by four companies with 5–10 % (Schenker, Instabee, FedEx Express, Bring Parcels), and then another four companies with 1–5 % (UPS, Early Bird, Airmee, Best Transport).

Table 6: Market shares and concentration – parcels delivered in Sweden

Parcel delivery operator	Market share (turnover) Distributed in Sweden		Parcel delivery operator	Market share (volume) Distributed in Sweden	
Postnord	45-50%	-2	Postnord	50-55%	-2
DHL	10-15%	1	Instabee	10-15%	3
Schenker	5-10%	-1	DHL	5-10%	0
Instabee	5-10%	2	Schenker	5-10%	-2
FedEx Express	5-10%	-1	Early Bird	5-10%	0
Bring Parcels	5-10%	1	Bring Parcels	1-5%	1
UPS	1-5%	0	UPS	1-5%	0
Early Bird	1-5%	0	Airmee	1-5%	1
Airmee	1-5%	0	FedEx Express	1-5%	0
Best Transport	1-5%	0	CityMail	1-5%	0
4 operators individually <1 %	ca 2% combined	--	4 operators individually <1 %	ca 1,5% combined	--
HHI	26%	↓ (27%)	HHI	30%	↓ (32%)
CR4 (four largest)	78%	— (78%)	CR4 (four largest)	81%	↑ (79%)
Instability index	8	↓ (11)	Instability index	9	↓ (16)

Note: Changes in percentage points; green marking: "improvement"; red marking: "worsening"

Compared to the previous year, three companies have strengthened their position: Instabee (+2 percentage points), and DHL and Bring Parcels (+1 percentage point each). Four companies have lost market share: Postnord (-2 percentage points), and Schenker, FedEx Express and Best Transport (-1 percentage point each). The position of other operators remains relatively unchanged, with either an increase (green) or decrease (red) of less than one percentage point.

A calculation of the HHI gives a value of 26%, i.e. high market concentration (albeit bordering on moderate), with an HHI decrease of 1 percentage point during the year. The CR4 remains unchanged at around 78% and the instability index is at 8 percentage points, i.e. a slightly lower degree of market share reallocation compared to the previous year.

The analysis shows that the degree of market concentration is higher when the indicators are calculated based on volume rather than turnover, but that concentration has decreased at a faster pace over time. Over the period 2018–2022:

- The HHI decreased by 5 percentage points in terms of turnover (12 percentage points in terms of volume)
- The CR4 decreased by 8 percentage points in terms of turnover (12 percentage points in terms of volume)
- The CR1 decreased by 4 percentage points in terms of turnover (10 percentage points in terms of volume)
- Compared to the total market, market concentration (HHI, CR4) has been higher, but is decreasing at a faster pace over time.

Over the period 2018–2022, there was an increase in both the number of companies operating and the proportion of market shares reallocated each year, which can be interpreted as an indication of more intense competition over time. The stabilisation/decrease in these indicators in 2022 reflects the merger of Budbee and Instabox.

Table 7: Development of the concentration and competition indicators over time

Measure:	Distributed in Sweden (turnover)						Distributed in Sweden (volume)					
	2018	2019	2020	2021	2022	2018-22	2018	2019	2020	2021	2022	2018-22
HHI	31%	30%	28%	27%	26%	-5	43%	41%	35%	32%	30%	-12
CR4	86%	86%	82%	78%	78%	-8	93%	91%	84%	79%	81%	-12
Postnord	50-55%	-2	0	-1	-2	-4	60-65%	-2	-4	-2	-2	-10
I-index	--	6	7	11	8	2	--	4	11	16	9	5
No. businesses	12	12	15	15	14	2	12	12	15	15	14	2

Note: HHI = Herfindahl Hirschmann Index; CR4 = combined market share of the four larges; I-index = Instability index

3.4 Market concentration: domestic parcels

There are 14 operators in the domestic market (see definitions in 1.2), of which 8 operators individually has a market share exceeding 1 %.

Postnord is the largest operator, with a market share of 50–55 % in terms of turnover. Next come three companies with a market share of 10–15 % (DHL, Schenker, Instabee), followed by four operators with 1–5 % (Bring Parcels, Early Bird, Airmee, Best Transport).

Table 8: Market shares and concentration – domestic parcels

Parcel delivery operator	Market share (turnover) Domestic parcels	
Postnord	50-55%	-2
DHL	10-15%	1
Schenker	10-15%	-1
Instabee	10-15%	2
Bring Parcels	1-5%	1
Early Bird	1-5%	0
Airmee	1-5%	0
Best Transport	1-5%	-1
6 operators individually < 1%	ca 3,5% combined	--
HHI	32% ↓	(33%)
CR4 (four largest)	87% ↑	(84%)
Instability index	8 ↓	(12)

Parcel delivery operator	Market share (volume) Domestic parcels	
Postnord	50-55%	-2
Instabee	10-15%	3
DHL	10-15%	0
Schenker	5-10%	-2
Early Bird	5-10%	0
Bring Parcels	1-5%	1
Airmee	1-5%	0
CityMail	1-5%	0
Best Transport	1-5%	0
5 operators individually <1 %	< 1% combined	--
HHI	30% ↓	(31%)
CR4 (four largest)	84% ↑	(81%)
Instability index	9 ↓	(18)

Note: Changes in percentage points; green marking: "improvement"; red marking: "worsening"

Compared with the previous year, in particular three companies have strengthened their position, Instabee (+2 percentage points) and DHL and Bring Parcels (+1 percentage point each), while Postnord (-2 percentage points), Schenker and Best Transport (-1 percentage point each) have weakened their position. The position of other operators remains relatively unchanged, each with either an increase (green) or decrease (red) of less than one percentage point.

The HHI shows a value of 32 %, which implies high market concentration, which albeit has decreased by one percentage point over the year. The CR4 shows a value of 87 %, an increase of 3 percentage points over the year, reflecting the merger of Instabox and Budbee. Instability index shows that 8 percentage points of market share have been reallocated during the year, which is slightly lower than in the previous year.

Looking at the development over time, it can be seen that the degree of market concentration has generally been higher when the indicators are calculated based on volume rather than turnover, but that the concentration has decreased at a faster pace over time. Over the period 2018–2022:

- The HHI decreased by 6 (13) percentage points in terms of turnover (volume)
- The CR4 decreased by 5 (11) percentage points in terms of turnover (volume)
- The CR1 decreased by 5 (12) percentage points in terms of turnover (volume)
- Compared to the total market, market concentration (HHI, CR4) has been higher, but is decreasing at a faster pace.

Changes in the number of companies and market shares reallocated each year can be seen as an indicator of the intensity of competition in the market. Since 2018, both the number of active companies and the proportion of market shares reallocated each year have increased in the domestic market.

Table 9: Development of the concentration and competition indicators over time

Measure:	Domestic parcels (turnover)						Domestic parcels (volume)					
	2018	2019	2020	2021	2022	2018-22	2018	2019	2020	2021	2022	2018-22
HHI	38%	37%	34%	33%	32%	-6	44%	42%	34%	31%	30%	-13
CR4	92%	92%	86%	84%	87%	-5	96%	94%	87%	81%	84%	-11
Postnord	55-60%	-1	-2	0	-2	-5	60-65%	-1	-6	-2	-2	-12
I-index	--	3	9	12	8	5	--	4	13	18	9	5
No. businesses	12	12	15	15	14	2	12	12	15	15	14	2

Note: HHI = Herfindahl Hirschmann Index; CR4 = combined market share of the four larges; I-index = Instability index

3.5 Market concentration: incoming parcels

There are 11 operators in the incoming parcels market (see definitions in 1.2), of which 8 operators individually has a market share exceeding 1%.

FedEx is the largest operator, with a market share of 25–30% (in terms of turnover), closely followed by Postnord (also 25–30%). These are followed by one operator with 15–20% (UPS), then two operators with 5–10% (Bring Parcels, DHL), and then three operators with 1–5% (Schenker, Airmee, Instabee).

Table 10: Market shares and concentration – incoming parcels

Parcel delivery operator	Market share (turnover) Incoming parcels		Parcel delivery operator	Market share (volume) Incoming parcels			
FedEx Express	25-30%	-3	Postnord	55-60%	-4		
Postnord	25-30%	-2	UPS	15-20%	0		
UPS	15-20%	0	Bring Parcels	5-10%	1		
Bring Parcels	5-10%	2	FedEx Express	5-10%	-1		
DHL	5-10%	0	Schenker	1-5%	0		
Schenker	1-5%	0	Airmee	1-5%	--		
Airmee	1-5%	--	DHL	1-5%	0		
Instabee	1-5%	1	Instabee	1-5%	1		
3 operators individually < 1%	ca 1 % combined	--	Early Bird	1-5%	0		
			2 operators individually < 1%	<1 % combined	--		
HHI	20%	↓	(22%)	HHI	36%	↓	(40%)
CR4 (four largest)	82%	↓	(86%)	CR4 (four largest)	87%	↓	(90%)
Instability index	8	↓	(9)	Instability index	7	↑	(6)

Note: Changes in percentage points; green marking: "improvement"; red marking: "worsening"

Since the previous year, in particular two companies, Bring Parcels (+2 percentage points) and Instabee (+1 percentage point) have strengthened their position. In contrast, FedEx Express (-3 percentage points) and Postnord (-2 percentage points) have lost market share. The position of other operators remains relatively unchanged, with either an increase (green) or decrease (red) of less than one percentage point.

The HHI shows a value of 20 %, which implies moderate market concentration, which has decreased by 2 percentage points over the year. The CR4 shows a value of 82 %, which has decreased by 4 percentage points over the year, i.e. the smaller companies have strengthened their position over the year at the expense of the larger ones. Instability index shows a value of 8 percentage points of market share reallocation during the year, which is slightly lower than the previous year.

As in the other submarkets, we can see that the degree of market concentration is higher in terms of market shares based on volume compared to turnover, but that the concentration has decreased at a faster pace over time. Over the period 2018–2022:

- The HHI decreased by 2 (7) percentage points in terms of turnover (volume)

- The CR4 decreased by 4 (6) percentage points in terms of turnover (volume)
- The CR1 decreased by 2 (5) percentage points in terms of turnover (volume)
- Compared to the total market, the degree of concentration has decreased over time at a slightly slower pace

Over the period 2018–2022, the number of active companies increased, while there has been a decline in market shares reallocated each year, suggesting a growing submarket in which competition has become slightly more stable over time.

Table 11: Development of the concentration and competition indicators over time

Measure:	Incoming parcels (turnover)						Incoming parcels (volume)					
	2018	2019	2020	2021	2022	2018-22	2018	2019	2020	2021	2022	2018-22
HHI	22%	23%	24%	22%	20%	-2	43%	39%	43%	40%	36%	-7
CR4	87%	87%	88%	86%	82%	-4	93%	92%	92%	90%	87%	-6
CR1	25-30%	-2	6	-4	-2	-2	60-65%	-3	4	-2	-4	-5
I-index	--	15	12	9	8	-7	--	6	9	6	7	1
No. businesses	9	9	10	12	11	2	9	9	10	12	11	2

Note: HHI = Herfindahl Hirschmann Index; CR4 = combined market share of the four larges; I-index = Instability index

3.6 Market concentration: outgoing parcels

There are 11 operators in the outgoing parcels market (see definitions in 1.2), of which 7 operators individually has a market share exceeding 1%.

UPS is the largest operator, with a market share of 30–35% (in terms of turnover), followed by Postnord (20–25%), then DHL (15–20%), followed by Bring Parcels (10–15%), then FedEx Express (5–10%), and finally two operators with a market share of 1–5% (Schenker, Instabee).

Table 12: Market shares and concentration – outgoing parcels

Parcel delivery operator	Market share (turnover) Outgoing parcels	
UPS	30-35%	2
Postnord	20-25%	-1
DHL	15-20%	-1
Bring Parcels	10-15%	0
FedEx Express	5-10%	-1
Schenker	1-5%	0
Instabee	1-5%	1
4 operators individually <1%	ca 2 % combined	--
HHI	22% ↑	(21%)
CR4 (four largest)	85% --	(85%)
Instability index	5 ↓	(6)

Parcel delivery operator	Market share (volume) Outgoing parcels	
Postnord	35-40%	-1
Bring Parcels	20-25%	0
UPS	15-20%	-1
DHL	10-15%	0
Instabee	5-10%	2
FedEx Express	1-5%	0
Asendia	1-5%	1
Schenker	1-5%	0
3 operators individually <1%	<1 % combined	--
HHI	24% ↓	(25%)
CR4 (four largest)	87% ↓	(89%)
Instability index	5 ↓	(5)

Note: Changes in percentage points; green marking: "improvement"; red marking: "worsening"

Since last year, in particular two companies, UPS (+2 percentage points) and Instabee (+1 percentage point) have strengthened their position, while Postnord, DHL and FedEx have lost market share (about 1 percentage point each).

The HHI shows a value of 22 %, which implies moderate market concentration, which has increased by one percentage point over the year. The CR4 remains unchanged at 85 %. The instability index shows that 5 percentage points of market share have been reallocated during the year, which is slightly lower than the previous year.

As in the other submarkets, we can see that the degree of market concentration is higher in terms of volume compared to turnover, but has decreased at a faster pace over time. Over the period 2018–2022:

- The HHI remained relatively unchanged in terms of turnover, but decreased by 6 percentage points in terms of volume.
- The CR4 remained relatively unchanged in terms of turnover, but decreased by 5 percentage points in terms of volume.
- The CR1 decreased by 5 (9) percentage points in terms of turnover (volume)

- Compared to the total market, the market concentration (HHI, CR4) remained relatively stable over time in terms of turnover, but decreased at a slower pace in terms of volume.

Over the period 2018–2022, the number of active companies increased slightly, while we see a lower degree of market share reallocation each year, suggesting a growing submarket in which competition has become slightly more stable over time.

Table 13: Development of the concentration and competition indicators over time

Measure:	Outgoing parcels (turnover)						Outgoing parcels (volume)					
	2018	2019	2020	2021	2022	2018-22	2018	2019	2020	2021	2022	2018-22
HHI	22%	23%	22%	21%	22%	0	30%	29%	26%	25%	24%	-6
CR4	85%	86%	86%	85%	85%	0	92%	94%	91%	89%	87%	-5
CR1	25-30%	0	-2	-1	-1	-5	45-50%	-2	-6	0	-1	-9
I-index	--	11	6	6	5	-6	--	9	10	5	5	-4
No. businesses	10	10	11	13	11	1	10	10	11	13	11	1

Note: HHI = Herfindahl Hirschmann Index; CR4 = combined market share of the four larges; I-index = Instability index

3.7 Market concentration: B2C parcels

As of 2023, PTS's data collection in June also includes business segments. Note that B2C parcels in this section include all e-commerce parcels, regardless of whether they are distributed in the letter carrier network (i.e. parcel letters) or the parcel distribution network. As mentioned earlier, two companies that have had a strong position in the B2C market and have grown significantly in recent years – Instabox and Budbee – merged to form the company Instabee in 2022.

There are 13 companies operating in the B2C parcels market, of which 9 operators each have a market share exceeding 1 %. Postnord is the largest operator, with a market share of 50–55 % (in terms of turnover), followed by Instabee (10–15 %), then three operators with 5–10 % (DHL, Schenker, Bring Parcels), and then four operators with 1–5 % (Early Bird, Airmee, Best Transport, UPS).

Table 14: Market shares and concentration – B2C parcels

Parcel delivery operator	Market share (turnover) B2C market	Parcel delivery operator	Market share (volume) B2C market
Postnord	50-55%	Postnord	50-55%
Instabee	10-15%	Instabee	15-20%
DHL	5-10%	Early Bird	5-10%
Schenker	5-10%	DHL	5-10%
Bring Parcels	5-10%	Schenker	5-10%
Early Bird	1-5%	Bring Parcels	1-5%
Airmee	1-5%	Airmee	1-5%
Best Transport	1-5%	CityMail	1-5%
UPS	1-5%	Best Transport	1-5%
5 operators individually <1%	ca 2% combined	5 operators individually <1%	ca 1,5% combined
HHI	33%	HHI	32%
CR4 (four largest)	84%	CR4 (four largest)	84%

As mentioned in section 1.1, this year's data collection marks the first time that data on business segments are collected from all operators and up to 31.5 kg. For this reason, it is not possible to make comparisons over time.

The HHI shows a value of 33 %, indicating high market concentration. The CR4 shows a value of 84 %, which implies an oligopoly market with one dominant company.

In the B2C segment, there are fewer differences between market shares based on turnover compared to volume. This may indicate that the services in the segment are somewhat more homogeneous, but it is also clear that the B2C segment is characterised by strong price competition.

3.8 Market concentration: B2B parcels

There are 10 companies operating in the B2B parcels market, of which 8 operators individually has a market share exceeding 1 %. Postnord is the largest operator, with a market share of 30–35 % (in terms of turnover), followed by two companies with 15–20 % (DHL, FedEx Express), then followed by Schenker (10–15 %), UPS (5–10 %), and then three companies with 1–5 % (Bring Parcels, DSV Road, Jetpak).

Table 15: Market shares and concentration – B2B parcels

Parcel delivery operator	Market share (turnover) B2B market	Parcel delivery operator	Market share (volume) B2B market
Postnord	30-35%	Postnord	50-55%
DHL	15-20%	Schenker	10-15%
FedEx Express	15-20%	DHL	10-15%
Schenker	10-15%	UPS	10-15%
UPS	5-10%	Bring Parcels	5-10%
Bring Parcels	1-5%	FedEx Express	1-5%
DSV Road	1-5%	DSV Road	1-5%
Jetpak	1-5%	3 operators individually <1%	ca 1% combined
2 operators individually < 1%	< 1% combined		
		HHI	31%
HHI	20%	CR4 (four largest)	87%
CR4 (four largest)	80%		

As mentioned in section 1.1, this year's data collection marks the first time that data on service segments are collected from all operators and up to 31.5 kg. For this reason, analysing developments since the previous year would give misleading results.

The HHI shows a value of 20 %, indicating moderate market concentration. The combined market share of the four largest companies (CR4) shows a value of 80 %, i.e. oligopoly market with one dominant company.

Compared to the other business segments, the B2B parcel segment has the lowest market concentration in terms of both HHI and CR4. This may be due to the fact that the B2B segment is a relatively mature market compared to the other service segments.

3.9 Market concentration: C2X parcels

C2X parcels make up the smallest business segment in the parcel market. Over the year, there has been quite a few innovative initiatives in this submarket. For example, a number of operators, including Postnord, iBoxen and Instabox have taken steps to enable C2C trade via their parcel lockers, and Tradera has introduced digital postage codes to facilitate C2C trade on their website.

There are 8 companies operating in the C2X parcel market, of which 5 operators individually has a market share exceeding 1 %. Postnord is the largest operator, with a market share of 40–45 % (in terms of turnover), followed by Schenker (30–35 %), then DHL (20–25 %), and then two companies with 1–5 % (Airmee and Bussgods).

When market shares are calculated based on volume instead of turnover, both Schenker and DHL have a higher market share than Postnord, which may reflect the companies' relatively strong position on marketplaces such as Blocket and Tradera.

Table 16: Market shares and concentration – C2X parcels

Parcel delivery operator	Market share (turnover) C2X market	Parcel delivery operator	Market share (volume) C2X market
Postnord	40-45%	Schenker	40-45%
Schenker	30-35%	DHL	30-35%
DHL	20-25%	Postnord	15-20%
Airmee	1-5%	Airmee	1-5%
Bussgods	1-5%	5 operators individually < 1%	ca 1,5% combined
3 operators individually < 1%	<1% combined		
		HHI	32%
HHI	32%	CR4 (four largest)	99%
CR4 (four largest)	98%		

As mentioned in section 1.1, this year's data collection marks the first time that data on business segments are collected from all operators and up to 31.5 kg. For this reason, analysing development since last year is not possible.

In terms of market concentration, the HHI shows a value of 32 %, indicating high market concentration. The CR4 shows a value of 98 %, which implies a highly concentrated oligopoly market.

The C2X segment is the submarket with the highest CR4 ratio – the market is in essence concentrated in four operators.

3.10. Market concentration: concluding remarks

PTS has in this chapter examined the degree of market concentration and competition in the Swedish parcel market. We have examined three concentration indicators: the concentration index HHI; the combined market share of the four largest companies (CR4); and the market share of the incumbent (Postnord). We have also examined two stability indicators, the development of which over time can give an indication of the “intensity of competition” – the number of active companies, and the proportion of market shares reallocated each year (instability index).

Table 17: Development of the concentration and stability indicators over time (2018–2022)

(Turnover)	HHI					CR4					Postnord				
	2018	2019	2020	2021	2022	2018	2019	2020	2021	2022	2018	2019	2020	2021	2022
Total market	25%	24%	23%	22%	21%	81%	81%	78%	75%	74%	40-45%	-1	-1	-1	-1
Distributed in Sweden	31%	30%	28%	27%	26%	86%	86%	82%	78%	78%	50-55%	-2	0	-1	-2
Domestic parcels	38%	37%	34%	33%	32%	92%	92%	86%	84%	87%	55-60%	-1	-2	0	-2
Incoming parcels	22%	23%	24%	22%	20%	87%	87%	88%	86%	82%	25-30%	-2	6	-4	-2
Outgoing parcels	22%	23%	22%	21%	22%	85%	86%	86%	85%	85%	25-30%	0	-2	-1	-1

(Turnover)	I-index					Number of companies				
	2018	2019	2020	2021	2022	2018	2019	2020	2021	2022
Total market	--	4	5	8	7	13	13	16	16	15
Distributed in Sweden	--	6	7	11	8	12	12	15	15	14
Domestic parcels	--	3	9	12	8	12	12	15	15	14
Incoming parcels	--	15	12	9	8	9	9	10	12	11
Outgoing parcels	--	11	6	6	5	10	10	11	13	11

The analysis shows that in 2022 there was moderate market concentration (HHI) in all submarkets, except for the market “parcels delivered in Sweden” and the domestic market, where market concentration was high. Between 2018 and 2022, the concentration has decreased in all submarkets, except for the market for outgoing parcels, where market concentration has remained more or less unchanged since 2018, albeit at a relatively low level.

The concentration ratio (CR4) shows that the combined market share of the largest companies in the market has decreased in most submarkets over the period 2018–2022, indicating that the market power of the largest companies has decreased over time, in favour of the smaller companies. The exception is outgoing parcel distribution, where the CR4 has remained relatively unchanged during the period.

Postnord remains the largest operator in all submarkets in terms of volumes, except in the C2X market, where Schenker is the largest. In terms of turnover, FedEx is the largest in the market for incoming parcels, while UPS is the largest in the market for outgoing parcels. During the period 2018–2022, Postnord has continuously lost market share in all submarkets, in favour of other players in the market.

Since 2018, the number of active companies has steadily grown in all submarkets, reflecting the fact that the parcel market is a market on the rise. At the same time, it appears that the market has transitioned into a more mature phase with a higher degree of consolidation of existing players, as illustrated by the decrease in this indicator in 2022.

Similarly, market share reallocation has increased over time in all submarkets, except for cross-border flows, where competition appears to have stabilised to a greater extent. In the domestic market, we continue to see a high degree of innovation – over the year we have seen the development of new solutions such as increased opportunities for returns management and C2C trade via parcel lockers and the introduction of digital postage codes. One interpretation is that Swedish parcel delivery service providers prioritise growth in the domestic market segment.

In summary, PTS concludes that the collected statistics show a relatively positive picture of the Swedish parcel market, with a steadily growing number of operators and moderate and/ or decreasing degree of market concentration in the various submarkets.

4. The market at the regional level

4.1 About the statistics at the regional level

This year's data collection includes parcel volumes per postcode, which enables analysis of the market at the regional level. This allows PTS to assess how far out in the country competition reaches, both at the aggregate level and per business segment. The report primarily presents the results at the municipal level.

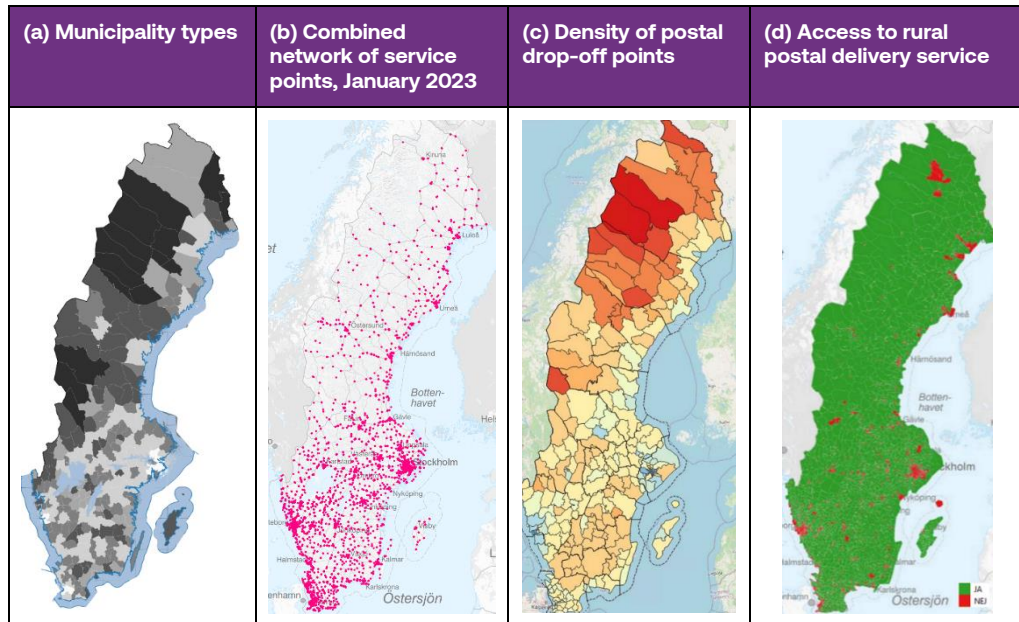
There have been some challenges in interpreting the statistics, as the volume data tends to be somewhat misleading in areas where there are large facilities handling parcel return volumes. However, as far as PTS can assess, this has not affected the general conclusions. In the future we hope to be able to separate out return volumes and report them separately.

4.2 Distribution at the regional level

Sweden has varying geographical conditions with long distances and large sparsely populated areas, as well as areas that in various ways can pose logistical challenges to parcel distribution. Examples of such areas are extensive forest and mountain areas, as well as archipelagos and islands which sometimes lack fixed land connections or ferry traffic.

Despite this, there is a relatively good geographical distribution of postal service points. Looking at actual volumes delivered over the year, many operators distribute relatively large volumes even to customers in more remote areas of the country (see more on regional competition by business segment in Section 4.3 below).

Table 18: Municipality types, service points, density of drop-off points, and access to rural postal delivery service (“Boka lantbrevbäring”)



The map in panel (a) is based on the Swedish Agency for Economic and Regional Growth's (Tillväxtverket) categorisation into 6 different municipality types,¹ from “Metropolitan municipalities” (light) to “Very sparsely populated rural municipalities” (dark), with the categorisation based on population density and distance to major urban centres.

Comparing this map with the aggregated network of fixed service points² for postal and parcel delivery services (panel b), it is clear that there are a large number of service points across the country and that service points are available even in very sparsely populated rural municipalities. It is also clear that there can be significant distances to fixed service points for residents and workers in the most sparsely populated areas.

The map in panel (a) is also reflected in panel (c), which illustrates the density of parcel delivery recipients in different parts of the country. Even though this map is based on the distance between recipients for letter distribution, it is a good illustration of where the challenges often are the greatest both in terms of delivery

¹ <https://tillvaxtverket.se/tillvaxtverket/statistikochanalys/statistikomregionalutveckling/regionalaindelningar/staderochlandsbygder.1844.html>

² All operators with fixed service networks.

times and costs per distributed parcel. Finally, panel (d) illustrates where Postnord offers the complementary rural postal and parcel delivery service (“Boka lantbrevbäring”), which largely includes rural areas and some smaller urban areas.

In the report Swedish Postal Market 2023³, PTS reports the number of fixed service points as of January 2023 for the distributors that use this type of delivery solution.

Table 19: Number of service points per distributor and geographical coverage in January 2023

Distributör	Antal servicepunkter 2023 (2022) ²⁵	Geografisk täckning 2023 (2022)	
		Antal län	Antal kommuner
Bring, totalt	1 670 (1 838)	21 (21)	290 (290)
Box Paketskåp	0 (73)		
Paketombud	1 670 (1 676)		
Budbee, totalt	1 628 (1403)	20 (16)	235 (216)
Box Paketskåp	1 628 (1403)		
Bussgods, totalt	263 (257)	21 (21)	117 (115)
Paketombud	263 (257)		
DHL Freight, totalt	1 859 (1 855)	21 (21)	290 (290)
Paketombud	1 857 (1 855)		
Box Paketskåp	2 (0)		
DHL Express, totalt²⁶	1 376 (1 360)	21 (21)	256 (255)
Paketombud	1 376 (1 360)		
Iboxen, totalt²⁷	988 (449)	15 (10)	67 (34)
Box Paketskåp	988 (449)		
Instabox, totalt	2 581 (2 252)	21 (19)	285 (278)
Box Paketskåp	2 581 (2 252)		
Postnord, totalt	4 012 (2 800)	21 (21)	290 (290)
Box Paketskåp	1 818 (602)		
Företagscenter ²⁸	195 (201)		
Postombud ²⁹	1 609 (1 601)		
Utlämningsställe ³⁰	390 (396)		
Schenker, totalt	1 687 (1 680)	21 (21)	290 (290)
Paketombud	1 687 (1 680)		
UPS, totalt	580 (599)	20 (20)	187 (192)
Paketombud	580 (599)		

This shows that 6 out of 9⁴ operators have established service points in all counties, and that 4 of these also have service points in all 290 municipalities in the country.

³ PTS-ER-2023:11, Table 14, p. 44

⁴ DHL Freight and DHL Express are counted here as 1 distributor, as the network is co-utilised by the two companies.

Looking instead at the volumes distributed in 2022, it is clear that a larger number of operators are active in the counties and municipalities than simply those offering fixed service points.

Table 19: Number of municipalities and counties in which each company has delivered parcels (2022)

Business:	Distribution in no. municipalities (of 290)	Distribution in no. counties (of 21):	Parcel operator	Postal operator
Airmee	122	18	X	
Best	210	21	X	
Bring	290	21	X	
Budbee	289	21	X	
Bussgods	290	21	X	
Citymail	107	9	X	X
DHL	290	21	X	
Early Bird	290	21	X	X
FedEx	290	21	X	
Instabox	289	21	X	
Jetpak	277	21	X	
Postnord	290	21	X	X
Schenker	290	21	X	
UPS	290	21	X	
Full coverage:	8 actors	12 actors		

Note: Green marking: full coverage. Note that data is missing for DSV Road AB

In 2022, 12 companies were active in all counties. Eight companies (Bring Parcels, Bussgods, DHL, Early Bird, FedEx, Postnord, Schenker and UPS) were in addition also active in all municipalities.

4.3 Market shares at the regional level

As previously mentioned, the market statistics have been reported to PTS by postcode and business segment. The data has then been collated in accordance with the first three digits in the postcode⁵ (which corresponds to the country divided into 551 areas) and then aggregated up to municipal level (290) and county level (21).

Given the practical challenges of presenting market shares at the regional level, PTS has opted to present the incumbent's proportion of total volumes at the municipal level for each of the business segments that are being analysed. The municipal level is selected because it appears to be the lowest geographical level at which market shares can be illustrated with maps in a reasonably accessible way.

PTS's parcel statistics data collection covers both companies that conduct traditional postal service operations subject to licensing (i.e. delivery of letters) and those that solely provide parcel delivery services. In practice, this means that parcels can be delivered through two different types of distribution networks: the "letter distribution network" and the "parcel distribution network".

The term "letter distribution network" refers to the network for regular distribution of letters (including small parcels, referred to as parcel letters)⁶. This form of distribution is characterised, inter alia, by the fact that it is based on regular and fixed delivery routes, since delivery requires a fine-meshed distribution network covering all addresses/postal recipients. Distribution through this network has a very wide scope as potentially all addresses within a given area may need to be visited.⁷

The parcel distribution network is instead characterised by dynamic delivery/distribution, where the distribution routes are optimised based on actual volumes and the requested delivery method (e.g. delivery to service point, parcel locker, or home delivery).

From a market perspective, the letter network and the parcel network are characterised by different conditions for effective competition, which is why in this

⁵ A compilation at the lowest level (5 positions) would have been desirable, but analysis at this level was not possible due to deficiencies in quality and reporting.

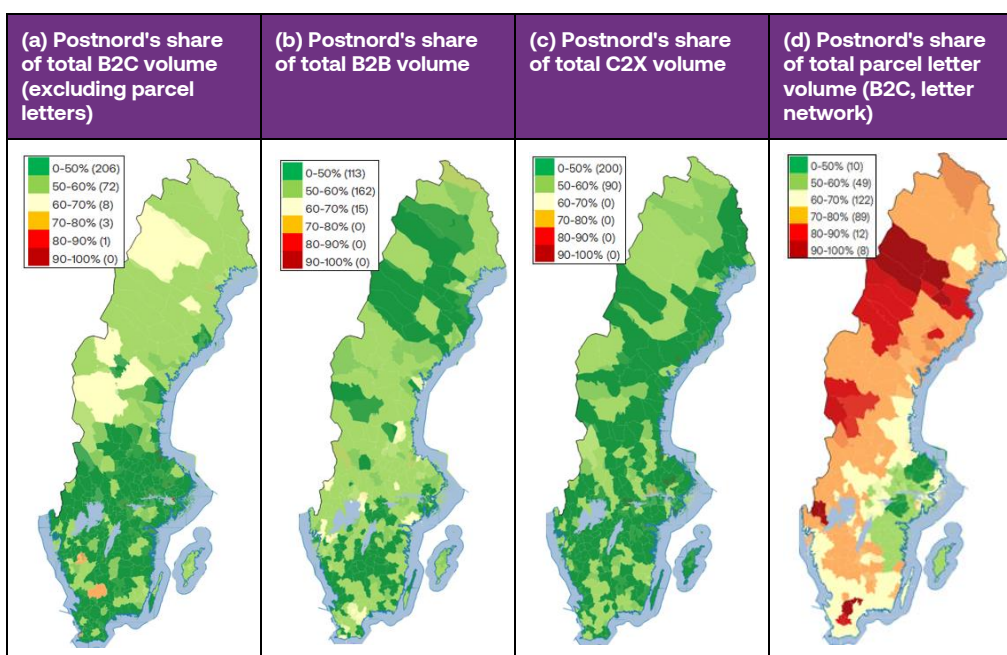
⁶ Chapter 1, Section 2 of the Swedish Postal Services Act (2010:2045): "an addressed mail item that is enclosed in an envelope or other wrapping weighing at most 2 kg together with viewcards, postcards and similar mail items"

⁷ In Postnord's case, full nationwide coverage, through the regulations of the Swedish Postal Services Act, the Swedish Postal Services Ordinance and licence requirements. For morning newspaper distributors, they must reach all subscribers on all delivery days.

section we distinguish between parcels distributed in the parcel distribution network and those distributed in the letter distribution network.⁸

Table 20 below shows Postnord's market share at the municipal level, i.e. Postnord's share of volumes as a proportion of total volumes in each business segment: B2C, B2B, C2X and parcel letters.

Table 20: Postnord's proportion of total volumes (B2C, B2B, C2X, parcel letters) (municipality, postcode 3 digits)⁹

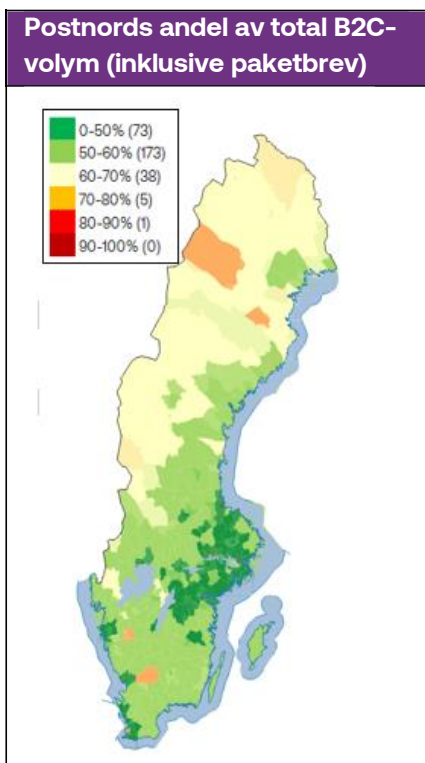


Looking at the parcel flows in the various parcel distribution networks (panels a–c), we can see that Postnord's market share falls short of 60 % in a majority of municipalities, regardless of business segment. This pattern is particularly clear in the C2X segment (panel c), where a predominant proportion of total volumes in fact are being distributed by Postnord's competitors (more than 50 % of volumes in 200 municipalities and more than 40% in the remaining 90). A similar picture emerges for B2B (panel b) and B2C (panel a), although within these segments there is a greater number of municipalities in which Postnord has a slightly stronger position. For the

⁸ The number of operators is more limited when it comes to the distribution of parcel letters. Here, there are in principle only three operators (if you count morning newspaper distributors with Early Bird as one operator; the others are Citymail and Postnord). Only Postnord has national coverage in this segment.
⁹ The base of the maps consists of Sweden's 290 municipalities. Where there are differences at postcode level (3 positions), these differences have been enhanced in the colour scheme.

B2C segment, it should be noted that estimated market shares are most likely affected by return flows. In each of the four municipalities in which Postnord has a B2C market share that exceeds 70 % (Järfälla, Ljungby, Malmö, Borås), the company either has a parcel terminal or a logistics centre – the higher volume shares in these municipalities may hence reflect the receipt and handling of e-commerce returns.

Looking instead at parcel distribution through the letter network (panel d), a contrasting pattern emerges, where Postnord has a market share that exceeds 60 % in a majority of municipalities (231 out of 290). Competition in terms of volume is strongest in 59 municipalities in eastern Svealand and north-eastern Götaland, including Gotland, primarily reflecting competition from Early Bird and Citymail. Postnord has over 90 % of volumes in 8 municipalities, the majority of which are sparsely populated rural municipalities.



Parcel letters are an important complement in the parcel market, predominantly in the B2C segment (although many smaller companies are also likely recipients of parcel letters). In this segment, Postnord has a special position in the market through its letter distribution network, particularly in various types of rural environments. Calculating market shares based on the aggregate volume of B2C parcels and parcel letters, allows us to get a complete picture of e-commerce deliveries up to 31.5 kg in Sweden. It is clear that, even with parcel letters included, competition reaches far out in the country. Postnord has a market share that falls short of 60 % in 246 of the municipalities (below 50 % in 73), but competition is somewhat weaker in the mountain municipalities and inner Norrland. However, those areas are by no means extremes; Postnord's market share generally falls within the range 60–70% in these areas.

4.4 Regional volumes: concluding remarks

This is the first year that PTS has been able to report the overall market picture at the regional and local level by market segment. What becomes clear is that competition extends far into the country in all market segments, and that Postnord rarely has a market share exceeding 50%, even in the more sparsely populated municipalities.

One exception, however, is the market for parcel letters, where Postnord's fine-meshed letter distribution network gives it a much stronger market position than it has in the traditional B2C, B2B and C2X parcel segments.

It should however be noted that, although PTS has been able to capture volume data at a relatively granular level in this year's data collection, there may be local markets in which service conditions differ and where Postnord may be the only player offering adequate service. The PTS ambition is that the authority eventually will be able to obtain volume data of sufficiently good quality to enable analysis at the lowest postcode level (five-digit level). This would enable more detailed analysis, moving from analysis of competition on the basis of the country divided into 551 postcode areas (at the three-digit level) to around 10 000 postcode areas (at the five-digit level).

References

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- ¹ Regulation (EU) 2018/644 of the European Parliament and of the Council of 18 April 2018 on cross-border parcel delivery services, <https://eur-lex.europa.eu/legal-content/SV/TXT/PDF/?uri=CELEX:32018R0644>
- ² See the list of parcel delivery service providers on the PTS website, <https://www.pts.se/sv/bransch/post/paketleverantorer/>
- ³ The following ten companies distribute for Early Bird: Hall Media Logistik, Nim Distribution, NWT, Point Logistik, Pressens Morgontjänst, Prolog, Svensk Hemleverans HB, Svensk Hemleverans Norr, Tidningstjänst AB, Västsvensk tidningsdistribution
- ⁴ Commission Implementing Regulation (EU) 2018/1263 of 20 September 2018 establishing the forms for the submission of information by parcel delivery service providers pursuant to Regulation (EU) 2018/644 of the European Parliament and of the Council