



INTERNATIONAL POSTAL FLOWS PREPARING FOR (R)EVOLUTION

Postal & Delivery Conference 3 May 2019 Copenhagen

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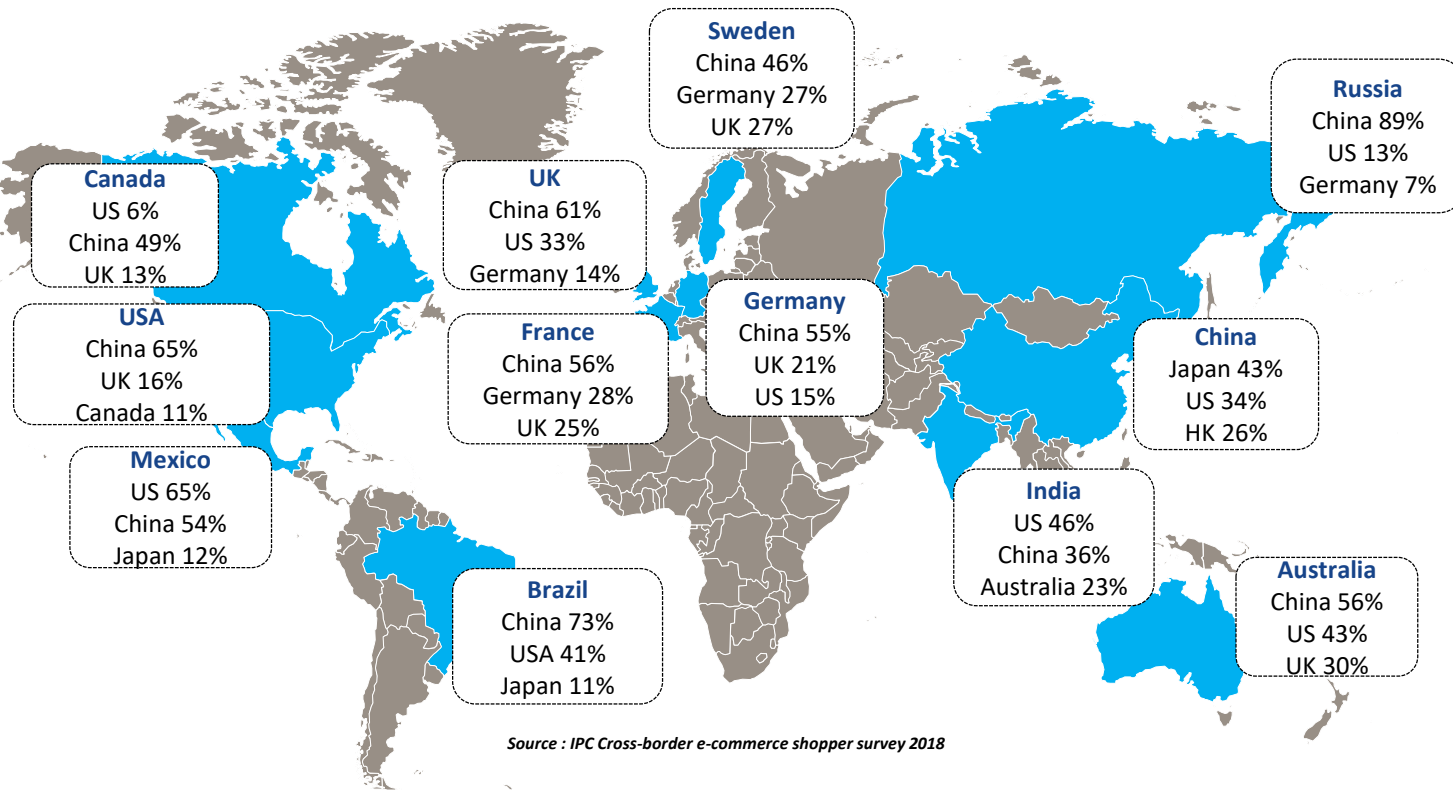

LE GROUPE LA POSTE

A changing postal business landscape

From letters to parcels



Changing postal routes

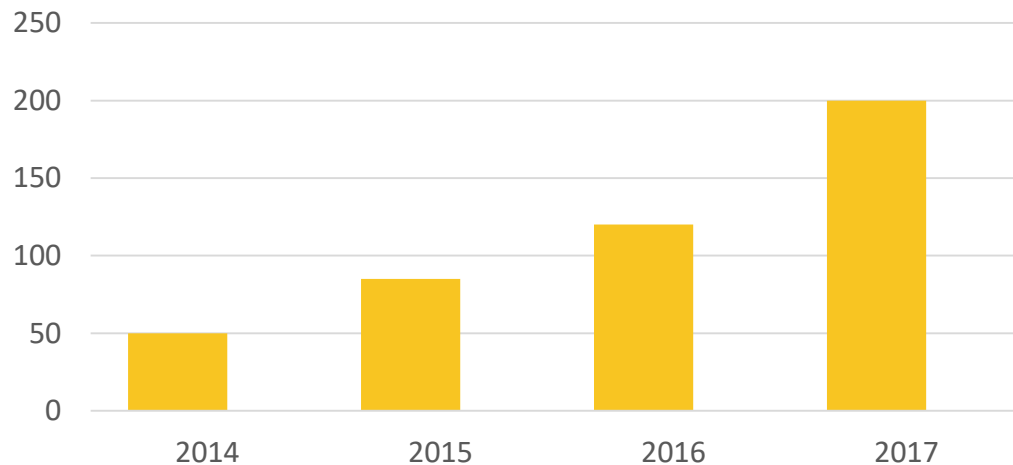


Source : IPC Cross-border e-commerce shopper survey 2018

The boom of international small packets

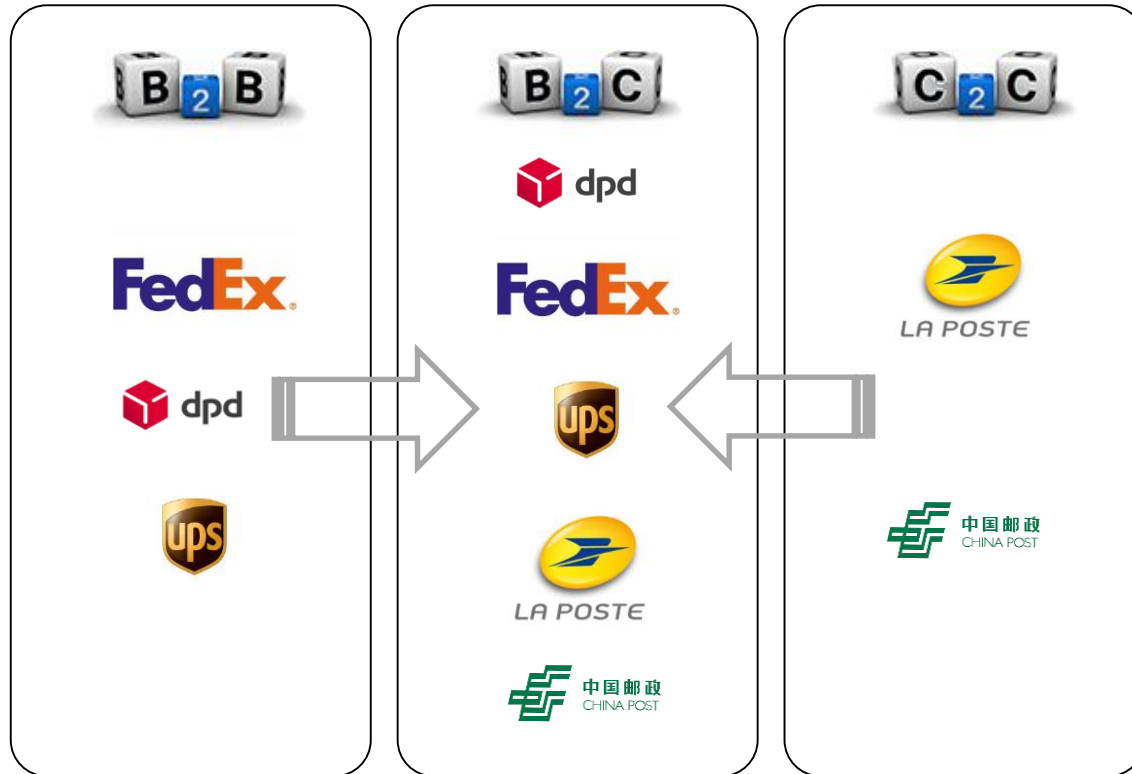


Volume of international import small packets in France (M)



Evolution of long-standing balances

The repositioning of parcel operators



New logistics actors

« Amazon va lancer son propre service de livraison, pour concurrencer FedEx et UPS »

« Liège Airport devient la plaque tournante d'Alibaba en Europe »

« Alibaba investira au départ 75 millions d'euros dans son hub logistique liégeois »

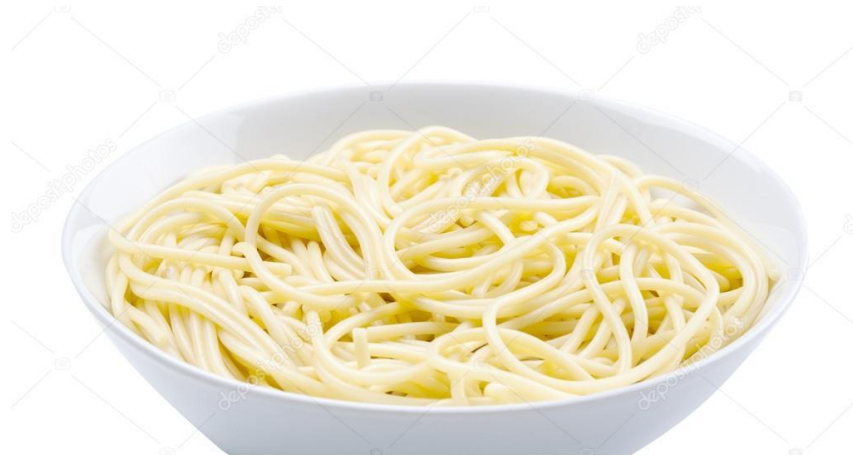
"Belgium wins battle for Chinese e-commerce giants Alibaba"

« Amazon becomes a postal operator in Italy »

Amazon, UPS and FedEx all rely on the U.S. Postal Service for the especially difficult and expensive job of taking packages from fulfillment centers to individual doorsteps.

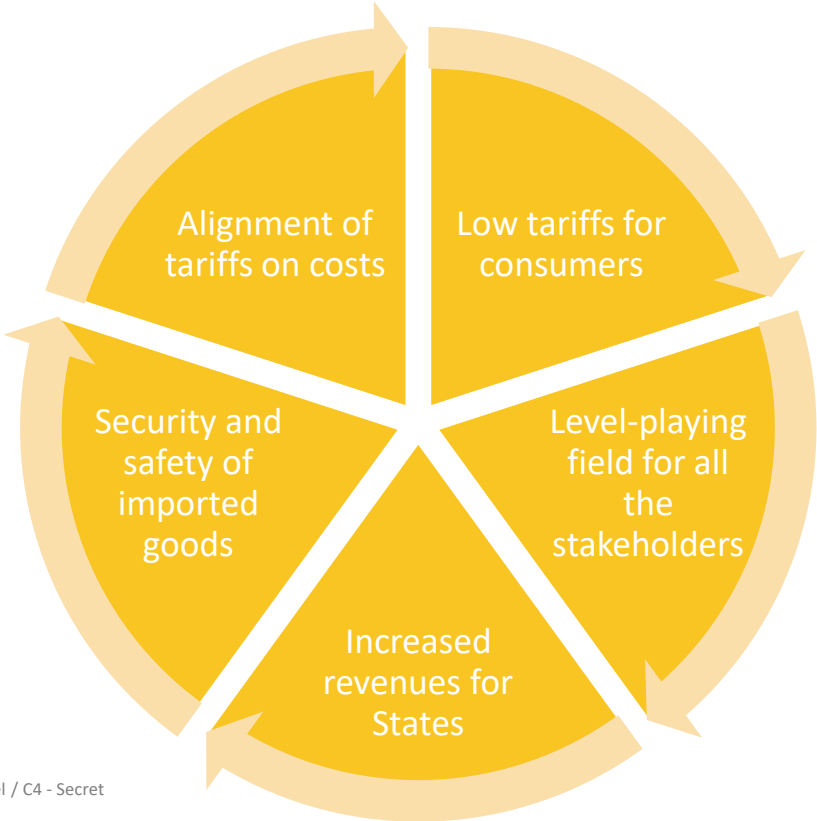
The UPU terminal dues system

Is the “spaghetti bowl” the future?

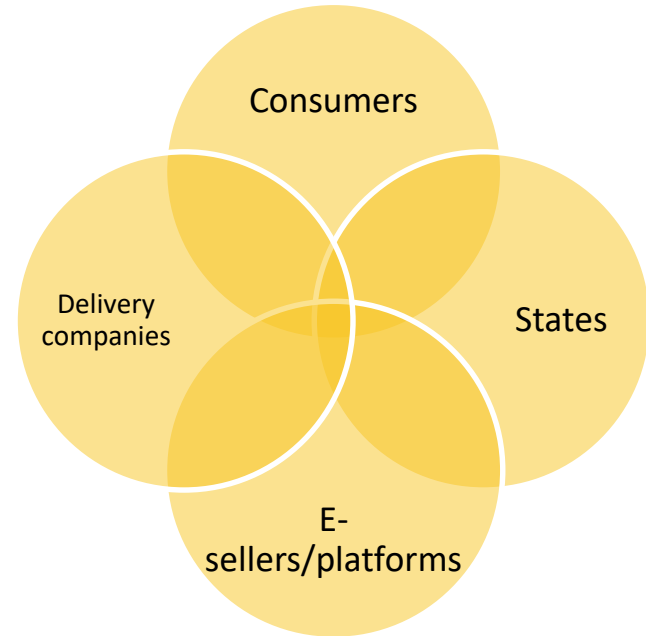
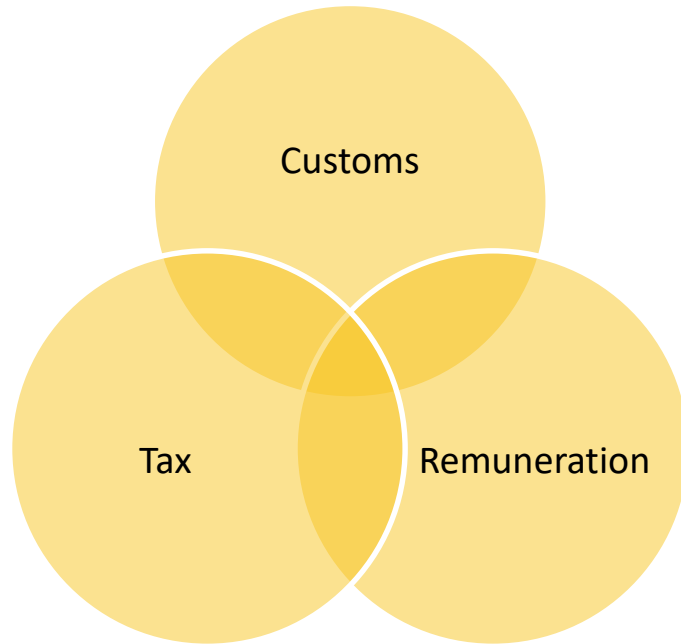


E-commerce: the impossible regulatory equation?

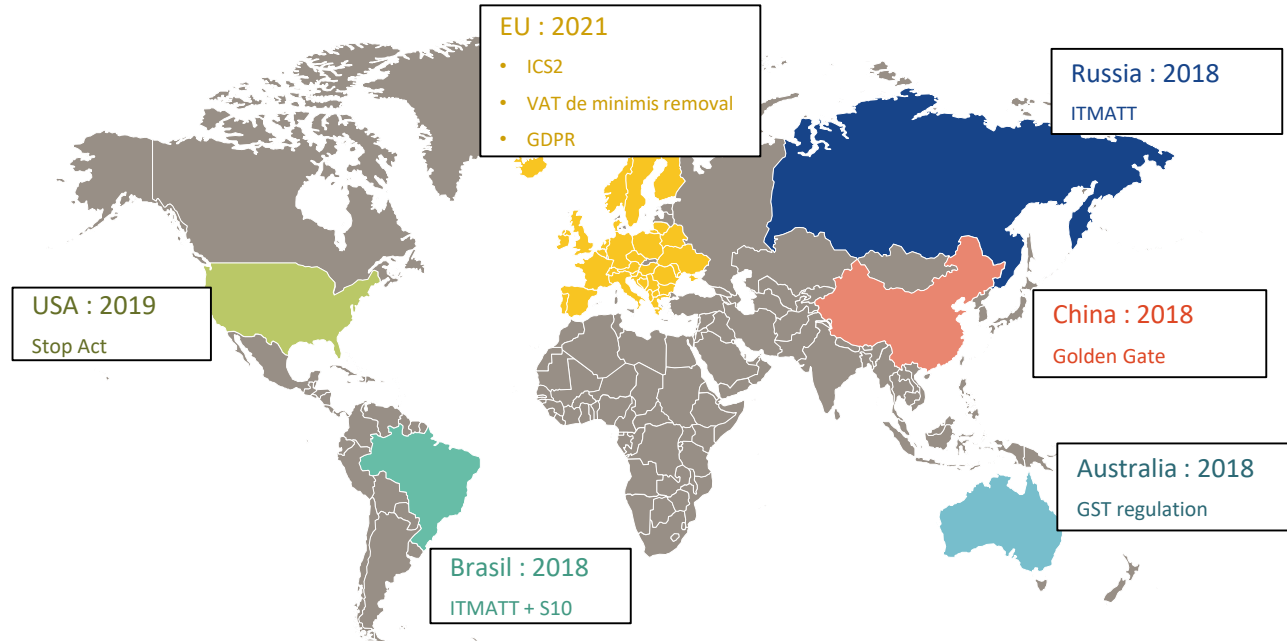
How to restore the equilibrium?...



... maximising the benefits of all the stakeholders?



Multiplication of new regulations



Still open questions from a postal point of view

- Full coherence of the regulations?
- Operational feasibility of the new requirements?
- A feasible implementing timetable?
- Does a uniform regulatory framework for all delivery operators really create a level-playing field?

Posts are transforming themselves...

- Definition of a global postal model for EAD
- UPU capacity-building programmes for embarking the whole postal community (Securex, ORE...)
- UPU Global data-sharing agreement
- UPU cooperation with international organisations (WCO, ICAO, IATA, EU) to define global standards and appropriate regulations
- Massive investments in IT systems and operational capabilities
- Increasing data exchanges

... To deal with new challenges

- **Creating new balances for the remuneration system**
 - Price increase vs preservation of volumes – « not to die healed »...
- **Uncertainty on the impact of the new regulations on users' behaviors**
 - Will this put an end to massive Chinese imports?
- **Reinventing the small packet business model**
 - Was based on low tariffs, untracked, simplified customs procedures

Merci

Questions?

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