

The Swedish Parcel Market 2023

Report based on the Swedish Post and Telecom
Authority's collection of parcel statistics in May 2024

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Preface

The Swedish Post and Telecom Authority (PTS) is responsible for continuously monitoring developments in the postal market, ensuring that postal services meet the needs of society, and promoting effective competition. Since 2018, PTS has been the 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”), which has given PTS increased opportunities to collect data from companies operating in the Swedish parcel market. The purpose of this report is to describe the development of the Swedish parcels market in 2022 in terms of growth and market concentration.

In summary, PTS can conclude that in 2023, domestic parcel distribution has seen moderate growth, while cross-border volumes have declined. The development reflects a sustained period of slow economic growth, high inflation, high interest rates and a weak foreign exchange rate.

Dan Sjöblom
Director General

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1. Introduction

1.1 About the statistics

The Swedish Post and Telecom Authority (PTS) collects, on an annual basis, statistics from parcel delivery service providers operating in the Swedish parcel market. The statistics are collected in accordance with the EU Parcel Regulation¹ and include statistics on volumes and turnover.

The statistics in this report were collected by the Authority in May 2024 and relate to data for the calendar year 2023. This year's collection covers a total of 24 individually registered companies.² Compared to last year (25 companies), two companies have been added (Ica paket and Bonway AB), the latter which is a merge between Nim Distribution, Hall Media Logistik and Prolog AB.

Statistics for companies within the same group have been aggregated up to the main company. This is the case with the eight distributors³ which cooperate within Early Bird, as well as DHL Freight and DHL Express. After this aggregation, 16 companies remain and are analysed in the report.

1.2 Definitions and description of submarkets

The statistics in this report follow the definitions set out in the EU Parcel Regulation:

- **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. Note that the definition includes all parcels which meet the definition, regardless of whether the parcels are distributed in the traditional letter distribution network (e.g. packets) or in the parcel distribution network.
- **Domestic parcel delivery services:** Both the sender and the recipient are located in Sweden

¹ Regulation (EU) 2018/644 of the European Parliament and of the Council of 18 April 2018 on cross-border parcel delivery services

² See the list of parcel delivery service providers on the PTS website, <https://www.pts.se/sv/bransch/post/paketleverantorer/>

³ The following eight companies cooperate within Early Bird: Bonway AB (tidigare Hall Media Logistik, Nim Distribution, Prolog KB), NWT, Point Logistik, Pressens Morgontjänst, Svensk Hemleverans HB, Svensk Hemleverans Norr, Tidningstjänst AB, Västsvensk tidningsdistribution. Note that both Early Bird volumes and the distributors' own volumes are included.

- **Incoming cross-border parcel delivery services:** The sender is located outside of Sweden, the recipient in Sweden
- **Outgoing cross-border parcel delivery service:** The sender is located in Sweden, the recipient outside of Sweden.

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

- **Total market:** the sum of domestic, incoming and outgoing parcel delivery services
- **Parcels distributed in Sweden:** the total 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:

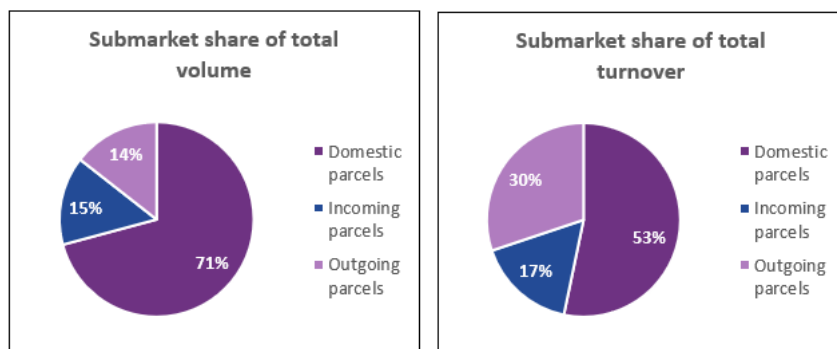
- **B2C market:** business-to-consumer parcels, e.g. distribution to consumer of goods that have been purchased online.
- **B2B market:** business-to-business parcels. This data collection covers single piece consignments of business parcels below 31.5 kg.
- **C2X market:** parcels sent from consumers 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 Swedish parcel market's largest submarket in terms of number of parcels is domestic parcels (71% of the total number of parcels delivered), followed by incoming cross-border parcels (15%) and outgoing cross-border parcels (14%). Looking instead at turnover, the imports and exports markets make up a slightly larger share of the market.

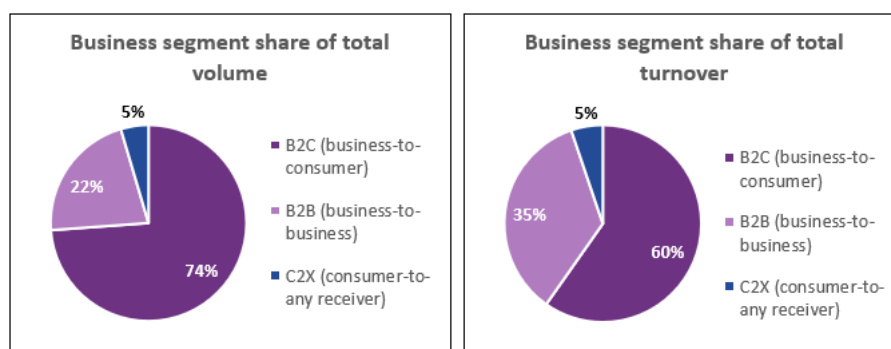
Figure 1: Domestic, incoming and outgoing parcel delivery services as a proportion of total volumes and turnover



2.2 Business segments (all parcels distributed in Sweden)

The parcel market is usually divided into three main business segments, with B2C parcels representing the largest segment (74% of total volumes of parcels distributed in Sweden), followed by B2B parcels (22%) and C2X parcels (5%). Looking instead at turnover, the B2B segment represents a slightly larger share of the market.

Figure 2: B2C, B2B and C2X as a proportion of the total volume and turnover (distributed in Sweden)



2.3 Parcel market volumes, turnover and growth in 2023

In 2023, approximately 345 million parcels were distributed in the total market, of which 295 million were parcels distributed in Sweden. Domestic parcel distribution amounted to 245 million parcels, incoming distribution to 51 million parcels, and outgoing distribution to 50 million parcels.

In terms of turnover, the total value of the market amounted to SEK 22.3 billion in 2023, of which SEK 15.6 billion related to parcels distributed in Sweden. Domestic parcel distribution amounted to SEK 11.9 billion, incoming distribution to SEK 3.7 billion, and outgoing distribution to SEK 6.7 billion.

Table 1: Parcel market volumes, turnover and growth in 2023

Submarket	Outcome 2023		Growth 2022-2023	
	Turnover (bn SEK)	Volume (million)	Turnover	Volume
Domestic parcels	11.9	245	-2%	4%
Incoming parcels	3.7	51	26%	-1%
Outgoing parcels	6.7	50	-1%	-5%
All parcels distributed in Sweden	15.6	295	4%	3%
Total market	22.4	345	2%	2%

In 2023, the total market grew by about 2%, in terms of both volume and turnover. Looking only at parcels distributed in Sweden, growth was 3% in terms of volume and 4% in terms of turnover.

The totals conceal two opposing trends. While domestic volumes have increased (+4%), cross-border incoming and outgoing volumes have decreased (by -1% and by -5%, respectively).

Import totals also conceal opposing trends, with the number of incoming parcels from countries outside of Europe (especially China) rising sharply during the year, while imports from countries within Europe declined. Factors which have had an

impact include the recession, a weaker Swedish krona, and a surge in e-commerce from low-cost giants like Temu and Shein. The sharp increase in turnover in the import market can be explained by a shift in the product mix, with more and more customers choosing home delivery instead of delivery to pick-up points, which has led to an increase in the average revenue of imported parcels.

In summary, PTS can conclude that 2023 saw a moderate growth in the domestic market, while cross-border volumes at the overall level have declined. This development reflects continued weak economic development during the period, with high inflation, high interest rates and a weak exchange rate.

3. Market concentration

3.1 Indicators of market concentration

3.1.1 Market shares

Market shares are usually calculated on the basis of value (e.g. turnover), 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 characterised by very homogenous products, where market shares based on volumes may give a more accurate picture. In a homogenous market, products are similar, and a cheap product can easily replace a more expensive product. In such a market, a business that offers a new, substantially cheaper product can successfully gain large volumes and have a large competitive impact, even if it does not earn large revenues.² The parcel market consists of several submarkets and segments⁴, in which both simpler standard products and premium products⁵ are offered and which are subject to varying price-setting models, all of which creates added complexity that makes it difficult to analyse the market only from the perspective of either value or volume. Thus, 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.⁶

⁴ Beyond submarkets such as B2B, B2C and C2X there are various customer segments within each submarket. Cross-border parcels are also affected by international agreements and tariffs which further complicates the picture.

⁵ E.g. delivery speed and delivery methods

⁶ Gwin (2001), A guide for industry study and the analysis of firms and competitive strategy

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-Hirschman Index

Herfindahl-Hirschman 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 reallocation, which may be an indication of a higher intensity of competition.⁷

3.2 Market concentration: total market

There are 16 operators operating at the level of the total market (see section 1.2 for definitions). Of these, 9 operators have a market share exceeding 1%.

Postnord is the largest operator, with 40–45% of the market in terms of turnover, followed by two companies with 10–15% (UPS, DHL), four companies with 5–10% (Bring Parcels, Schenker, Instabee and FedEx Express), and two companies with 1–5% (Early Bird⁷ and Airmee).

Table 4: Market shares and concentration – total market

Parcel operator	Market share (turnover) Total market 2023		Parcel operator	Market share (volume) Total market 2023	
Postnord	40-45%	1	Postnord	45-50%	0
UPS	10-15%	0	Instabee	5-10%	-1
DHL	10-15%	0	DHL	5-10%	0
Bring Parcels	5-10%	1	Bring Parcels	5-10%	1
Schenker	5-10%	0	Schenker	5-10%	0
Instabee	5-10%	-1	Early Bird	5-10%	0
FedEx Express	5-10%	-1	UPS	1-5%	0
Early Bird	1-5%	0	Airmee	1-5%	0
Airmee	1-5%	0	CityMail	1-5%	1
7 firms each <1%	ca 2.5% combined		FedEx Express	1-5%	0
			6 firms each <1 %	ca 1% combined	
HHI	22% ↑	(21%)	HHI	28% ↓	(29%)
CR4 (four largest)	75% ↑	(74%)	CR4 (four largest)	77% ↓	(78%)
Instability index	5 ↓	(6)	Instability index	4 ↓	(8)

Change in market share in percentage points. Green = position improved. Red = operator has lost market share. Companies <1%: DSV, Best, Jetpak, Citymail, Bussgods, Asendia, Ica paket

Compared to the previous year, mainly Postnord and Bring Parcels have strengthened their position (one percentage point each in terms of turnover), while mainly Instabee and FedEx Express have lost market share (one percentage point each). The position of other operators remains relatively unchanged, with either a marginal increase (green) or decrease (red) of less than one percentage point.

The HHI shows a value of 22% (turnover), which implies a moderate market concentration, which has increased by one percentage point over the year. The concentration ratio (CR4) is 75%, indicating an oligopoly market, in this case with one dominant company. The CR4 has increased by one percentage point, which reflects a slight overall strengthening of the position of the larger companies in the market.

⁷ Market shares for “Early Bird” also include the distributors’ own volumes

The instability index shows a value of 5, i.e. five percentage points (market shares) were redistributed during the year, which is slightly lower than the previous year.

Looking instead at market shares and concentration indicators based on volume, we find a similar picture. However, it is clear that some operators have a higher market share in terms of volume (e.g. Postnord and Early Bird), while other operators have a higher market share in terms of turnover (e.g. DHL, UPS and FedEx), which most likely reflects differences in prices and/or product mix (e.g. standard vs. premium, letters vs. parcels).

We also find a higher degree of market concentration in terms of volume, which however has decreased at a faster rate over time. This applies to Postnord's market share, as well as to the HHI and the CR4. In 2023, there has been a weakening in this trend, with the market concentration having increased slightly in terms of turnover, but continuing to decrease in terms of volume (see Table 5 below).

Instability index (the degree of market share reallocation) has fluctuated slightly over time. Reallocation was generally higher during the pandemic years, when the market also experienced strong growth, particularly in the premium segment of home delivery, but has since levelled off slightly. The number of companies in the market has generally increased over time. ICA Paket entered the market in 2023, and in addition, two more companies (Loomis and Velove) have registered as parcel delivery operators and will be included in the next year's data collection. In recent years, the market has also seen a higher degree of consolidation of existing companies, which may be expected in a somewhat more mature market.

Table 5: Development of the competition indicators over time

Indicator	Total market (turnover)							Total market (volume)						
	2018	2019	2020	2021	2022	2023	2018-23	2018	2019	2020	2021	2022	2023	2018-23
HHI	25%	24%	23%	22%	21%	22%	-3	39%	37%	32%	30%	29%	28%	-11
CR4	81%	81%	78%	75%	74%	75%	-6	90%	89%	82%	76%	78%	77%	-12
Postnord	40-45%	-1	-1	-1	-1	1	-3	55-60%	-2	-4	-2	-2	0	-10
I-index	--	4	5	8	6	5		--	4	9	14	8	4	
No. bus.	13	13	16	16	15	16	3	13	13	16	16	15	16	3

Note: HHI = Herfindahl Hirschmann Index; CR4 = combined market share of 4 largest companies; I-index = Instability index

3.3 Market concentration: parcels distributed in Sweden

There are 15 operators active in the market for parcels distributed in Sweden (see section 1.2 for definitions). Of these, 9 operators have a market share exceeding 1%.

Postnord is largest, with 45–50% of the market in terms of turnover, followed by DHL (10–15 %), followed by three companies with 5–10% (Schenker, Instabee, Bring Parcels), and four companies with 1–5% (FedEx, UPS, Early Bird, Airmee).

Table 6: Market shares and concentration – distributed in Sweden

Parcel operator	Market share (turnover) Distributed in Sweden 2023		Parcel operator	Market share (volume) Distributed in Sweden 2023			
Postnord	45-50%	1	Postnord	50-55%	0		
DHL	10-15%	0	Instabee	10-15%	-1		
Schenker	5-10%	0	DHL	5-10%	0		
Instabee	5-10%	-1	Schenker	5-10%	0		
Bring Parcels	5-10%	1	Bring Parcels	5-10%	1		
FedEx Express	1-5%	-1	Early Bird	5-10%	0		
UPS	1-5%	0	UPS	1-5%	0		
Early Bird	1-5%	0	Airmee	1-5%	0		
Airmee	1-5%	0	CityMail	1-5%	1		
6 firms each <1 %	ca 3% combined	--	6 firms each <1 %	ca 2% combined	--		
HHI	27%	↑	(26%)	HHI	30%	↓	(31%)
CR4 (four largest)	77%	↓	(78%)	CR4 (four largest)	79%	↓	(81%)
Instability index	5	↓	(8)	Instability index	5	↓	(9)

Change in market share in percentage points. Green = position improved. Red = operator has lost market share.
Companies <1%: Best, DSV, Citymail, Jetpak, Bussgods, Ica paket

Compared to the previous year, mainly Postnord and Bring Parcels have strengthened their position (one percentage point each), while mainly Instabee and FedEx have lost market share (one percentage point each). The position of other operators remains relatively unchanged, with either a marginal increase (green) or decrease (red) of less than one percentage point.

Calculating the HHI yields a value of 27% (turnover), which represents high market concentration. This is an increase of one percentage point over the year. The concentration ratio is 77%, which has decreased slightly over the year. This reflects the fact that, while the largest company strengthened its position, the combined market share of the four largest companies has decreased slightly over the year. Instability index shows a slightly lower degree of market share reallocation (six percentage points compared with eight in the previous year).

Looking instead at market shares and concentration indicators based on volume, we find a similar picture compared with the total market. Postnord's market share is higher and the market is more concentrated in terms of volumes, but concentration tends to decrease at a higher rate over time.

3.4 Market concentration: domestic parcels

There are 15 operators operating in the market for domestic parcels (see section 1.2 for definitions). Of these, 8 operators have a market share exceeding 1%.

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

Table 7: Market shares and concentration – domestic parcels

Parcel operator	Market share (turnover) Domestic parcels 2023		Parcel operator	Market share (volume) Domestic parcels 2023			
Postnord	50-55%	-2	Postnord	50-55%	1		
DHL	10-15%	0	Instabee	10-15%	-2		
Schenker	10-15%	0	DHL	10-15%	0		
Instabee	10-15%	0	Schenker	5-10%	-1		
Bring Parcels	5-10%	1	Early Bird	5-10%	0		
Early Bird	1-5%	1	Bring Parcels	5-10%	1		
Airmee	1-5%	0	Airmee	1-5%	0		
Best Transport	1-5%	0	CityMail	1-5%	0		
7 firms each <1%	ca 3.5% combined		7 firms each <1%	ca 1.5% combined			
HHI	30%	↓	(32%)	HHI	31%	↑	(30%)
CR4 (four largest)	85%	↓	(87%)	CR4 (four largest)	83%	↓	(84%)
Instability index	5	↓	(7)	Instability index	6	↓	(9)

*Change in market share in percentage points. Green = position improved. Red = operator has lost market share.
Companies <1%: DSV, Jetpak, UPS, Bussgods, Citymail, FedEx, Ica paket*

Compared to the previous year, mainly Bring Parcel and Early Bird have strengthened their position (about one percentage point each in terms of turnover), while mainly Postnord has lost market share (about two percentage points). The position of other operators remains relatively unchanged, with either a marginal increase (green) or decrease (red) of less than one percentage point.

The HHI has a value of 30% (turnover), which represents high market concentration. However, this has decreased by two percentage points over the year. The concentration ratio is 85%, which also decreased by two percentage points. Instability index shows that five percentage points of market shares were redistributed during the year, which is a slightly lower degree of reallocation than in the previous year.

Looking instead at market shares and concentration indicators based on volume, we find a somewhat similar picture in terms of market concentration. However, Postnord has instead strengthened its position slightly, while Schenker, Instabee and Early Bird have lost market share to a greater extent, compared to when indicators are calculated based on turnover.

3.5 Market concentration: incoming parcels

There are 11 operators operating in the market for cross-border incoming parcels (see section 1.2 for definitions). Of these, 9 operators each have a market share exceeding 1%.

Postnord is the largest operator, with 35–40% of the market in terms of turnover. Next comes FedEx with 20–25%, then UPS (15–20%), followed by two companies with 5–10% (Bring Parcels, DHL), after which there are four companies with 1–5% (Schenker, Airmee, Citymail, Instabee).

Table 8: Market shares and concentration – incoming parcels

Parcel operator	Market share (turnover) Incoming parcels 2023		Parcel operator	Market share (volume) Incoming parcels 2023	
Postnord	35-40%	13	Postnord	45-50%	-8
FedEx Express	20-25%	-9	UPS	15-20%	0
UPS	15-20%	-3	Bring Parcels	10-15%	1
Bring Parcels	5-10%	-1	Schenker	5-10%	2
DHL	5-10%	-2	FedEx Express	1-5%	-1
Schenker	1-5%	0	Citymail	1-5%	4
Airmee	1-5%	1	Airmee	1-5%	1
Citymail	1-5%	1	DHL	1-5%	0
Instabee	1-5%	-1	Instabee	1-5%	0
2 firms each <1%	<1 % combined		2 firms each < 1%	<1 % combined	
HHI	22% ↑	(20%)	HHI	29% ↓	(37%)
CR4 (four largest)	83% —	(83%)	CR4 (four largest)	82% ↓	(88%)
Instability index	29 ↑	(8)	Instability index	19 ↑	(8)

Change in market share in percentage points. Green = position improved. Red = operator has lost market share.
Companies <1%: DSV, Jetpak

The incoming parcel market has seen a number of developments in 2023, along with a number of conflicting trends. A number of operators have reported a sharp increase in imports from outside of Europe, particularly from China, while imports from countries within the EU have decreased. There has also been a relatively strong reallocation of volumes between operators during the year. While mainly Postnord (-8 percentage points) and FedEx Express (-1 percentage point) have lost market shares in terms of volume, most of the other operators have strengthened their position. Specifically, Citymail (+4), Schenker (+2), Bring Parcels (+1) and Airmee (+1 percentage point) have strengthened their position.

If we instead look at market shares in terms of turnover, we find a slightly different picture, with Postnord instead having increased significantly (+13 percentage points), while several of the company's global competitors have lost market share. Postnord's

market share in terms of turnover is however still relatively low compared to its market share in terms of volume.

According to Postnord, the strengthened position in terms of turnover is mainly due to a shift in the product mix, with an increasing number of the company's customer choosing home delivery, instead of delivery to a pick-up point. A large share of this effect can be attributed to the fact that one of the company's major European customer in 2023 selected to send the majority of its volumes as home delivery, instead of previously as delivery to pick-up point, which significantly increased the average revenue of its imported parcels. Another reason cited is exchange rate effects as the euro has strengthened against the Swedish krona during the year. The change in market shares in terms of turnover should therefore be seen in the light of these effects and interpreted with caution.

Calculation of the HHI yields a value of 22% (turnover), which implies a moderate market concentration, which has increased by one percentage point over the year. The concentration ratio remains unchanged in 2023 at 83%. This reflects the fact that the largest operator has strengthened its position, but that market shares mainly have been reallocated amongst the largest companies in the market. Instability index shows that 29 percentage points (market shares) were reallocated during the year, which is a significantly higher degree of redistribution than in the previous year.

Looking instead at the concentration indicators calculated based on volume, we can see a relatively sharp decrease in all of the indicators, reflecting the reallocation in volumes from the largest operator to the other operators in the market. Instability index shows that 19 percentage points in terms of volume were redistributed during the year, which is a sharp increase compared to the previous year.

3.6 Market concentration: outgoing parcels

There are 12 operators active in the market for cross-border outgoing parcels (see section 1.2 for definitions). Of these, 7 operators have a market share exceeding 1%.

UPS is the largest with 30–35% of the market in terms of turnover, followed by Postnord (20–25%), DHL (15–20%), Bring Parcels (10–15%), FedEx Express (5–10%), after which follows two companies with 1–5% (Schenker, Instabee).

Table 9: Market shares and concentration – outgoing parcels

Parcel operator	Market share (turnover) Outgoing parcels 2023		Parcel operator	Market share (volume) Outgoing parcels 2023	
UPS	30-35%	0	Postnord	35-40%	0
Postnord	20-25%	1	Bring Parcels	20-25%	0
DHL	15-20%	0	UPS	15-20%	0
Bring Parcels	10-15%	1	DHL	10-15%	0
FedEx Express	5-10%	-1	Instabee	5-10%	0
Schenker	1-5%	0	FedEx Express	1-5%	1
Instabee	1-5%	-1	Asendia	1-5%	0
5 firms each <1%	ca 1 % combined		Schenker	1-5%	0
			4 firms each < 1%	<1 % combined	

HHI	22%	—	(22%)	HHI	24%	—	(24%)
CR4 (four largest)	87%	↑	(85%)	CR4 (four largest)	87%	—	(87%)
Instability index	4	↓	(5)	Instability index	2	↓	(5)

*Change in market share in percentage points. Green = position improved. Red = operator has lost market share.
Companies <1%: DSV, Asendia, Jetpak, Airmee, Bussgods*

Compared to the previous year, mainly Postnord and Bring Parcels have strengthened their position (one percentage point each in terms of turnover), while mainly FedEx and Instabee have lost market shares (about one percentage point each). The position of other operators remains relatively unchanged, with either a marginal increase (green) or decrease (red) of less than one percentage point.

The outgoing parcel market is one of the submarkets with the lowest market concentration. The HHI is 22% (turnover), indicating moderate market concentration, which is unchanged from the previous year. The concentration ratio is 87%, which has increased by two percentage points, which reflects a strengthening in the position of the largest firms over the year. Instability index shows that 4 percentage points (market shares) have been reallocated during the year, which is a decrease since the previous year.

Looking instead at indicators based on volume, we find that Postnord is the largest operator, and we can also see that there has been a more stable development over the year, with unchanged market concentration and a significantly lower degree of market share reallocation.

3.7 Market concentration: B2C parcels

There are 15 operators active in the B2C market (see section 1.2 for definitions). Of these, 9 operators have a market share exceeding 1%.

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

Table 10: Market shares and concentration – B2C parcels

Parcel operator	Market share (turnover) B2C parcels 2023		Parcel operator	Market share (volume) B2C parcels 2023	
Postnord	50-55%	0	Postnord	50-55%	-2
Instabee	10-15%	-1	Instabee	10-15%	-2
DHL	5-10%	0	Early Bird	5-10%	1
Bring Parcels	5-10%	2	DHL	5-10%	0
Schenker	5-10%	0	Schenker	5-10%	1
Airmee	1-5%	0	Bring Parcels	5-10%	2
Early Bird	1-5%	0	Airmee	1-5%	0
Best Transport	1-5%	0	CityMail	1-5%	1
UPS	1-5%	0	7 firms each < 1%	ca 1.5% combined	
6 firms each <1%	ca 1.5% combined				
HHI	32%	—	(32%)		
CR4 (four largest)	83%	↓	(84%)		
Instability index	5				
			HHI	30%	↓
			CR4 (four largest)	81%	↓
			Instability index	8	

Change in market share in percentage points. Green = position improved. Red = operator has lost market share.
Combined <1%: Citymail, Bussgods, DSV, FedEx Express, Jetpak, Ica paket

Compared to the previous year, Bring Parcels in particular has strengthened its position (about two percentage points), while Instabee in particular has lost market share (about one percentage point). The position of other operators remains relatively unchanged, with either a marginal increase (green) or decrease (red) of less than one percentage point.

The HHI is 32% (turnover), indicating high market concentration, which is relatively unchanged from the previous year. The concentration ratio is 83%, which represents a slight decrease from the previous year. Instability index has a value 5, i.e. about five percentage points (market shares) were reallocated during the year.

Looking instead at market shares and concentration indicators based on volume, we find a similar picture, although Postnord and Instabee have lost market share to a higher extent in terms of volume, while Schenker and Early Bird have increased their market share. The degree of market concentration is similar in terms of volume, but has decreased to a greater extent.

3.8 Market concentration: B2B parcels

There are 10 operators in the B2B parcel market (see section 1.2 for definitions), of which 8 operators each have a market share exceeding 1%.

Postnord is largest with 35–40% of the market in terms of turnover, followed by DHL with 15–20%. Next come three companies with 10–15% (FedEx Express, Schenker, UPS), followed by Bring Parcels (5–10%), followed by two operators with 1–5% (DSV, Jetpak).

Table 11: Market shares and concentration – B2B parcels

Parcel operator	Market share (turnover) B2B parcels 2023		Parcel operator	Market share (volume) B2B parcels 2023	
Postnord	35-40%	1	Postnord	45-50%	-1
DHL	15-20%	0	DHL	10-15%	0
FedEx Express	10-15%	-2	Schenker	10-15%	0
Schenker	10-15%	1	UPS	10-15%	1
UPS	10-15%	1	Bring Parcels	5-10%	1
Bring Parcels	5-10%	1	FedEx Express	1-5%	0
DSV Road	1-5%	-2	4 firms each <1%	ca <1.5% combined	
Jetpak	1-5%	0			
2 firms each <1%	<1% combined				

HHI	21% ↑	(20%)	HHI	30% --	(30%)
CR4 (four largest)	80% --	(80%)	CR4 (four largest)	87% --	(87%)
Instability index	8		Instability index	5	

*Change in market share in percentage points. Green = position improved. Red = operator has lost market share.
Combined <1%: Bussgods, Early Bird*

Compared to the previous year, Postnord, Schenker, UPS and Bring Parcels in particular have strengthened their position (one percentage point each), while mainly FedEx Express and DSV Road have lost market share (about two percentage points each). The position of other operators remains relatively unchanged, with either a marginal increase (green) or decrease (red) of less than one percentage point.

The HHI has a value of 21% (turnover), i.e. a moderate market concentration, which has increased slightly over the year. The concentration ratio remains unchanged at 80%. About 8 percentage points (market shares) were redistributed during the year.

If we instead look at market shares and concentration indicators calculated on volume, both Postnord and Schenker have lost some ground, while FedEx Express has lost slightly less in terms of volume. Market concentration is also in this submarket higher in terms of volume, as measured by the market share of the largest company, the CR4 and the HHI.

3.9 Market concentration: C2X parcels

There are 8 operators in the C2X market (see section 1.2 for definitions), of which 5 operators each have a market share exceeding 1%.

Postnord is the largest operator, with 60–65% of the market in terms of turnover. Next comes Schenker with 15–20%, followed by DHL (10–15%) and Airmee (1–5%).

Table 12: Market shares and concentration – C2X parcels⁸

Parcel operator	Market share (turnover) C2X parcels 2023		Parcel operator	Market share (volume) C2X parcels 2023	
Postnord	60-65%	0	Postnord	55-60%	1
Schenker	15-20%	-1	Schenker	20-25%	-3
DHL	10-15%	-1	DHL	15-20%	0
Airmee	1-5%	2	Airmee	1-5%	1
4 firms each <1%	ca 1.5% combined		4 firms each <1%	ca 1% combined	
HHI	46% --	(46%)	HHI	40% --	(40%)
CR4 (four largest)	98% ↓	(99%)	CR4 (four largest)	99% --	(99%)
Instability index	4		Instability index	5	

*Change in market share in percentage points. Green = position improved. Red = operator has lost market share.
Companies <1%: Bussgods, Early Bird, Jetpak, Instabee*

The second-hand market has undergone an upswing in recent years, a fact which is also reflected in the parcel statistics. While the C2X segment is the smallest business segment, it is the segment which has seen the strongest growth over the year, with a growth of around 20% in terms of volumes.

Compared with the previous year, Airmee in particular has strengthened its position (+2 percentage points in terms of turnover), while mainly Schenker and DHL have lost market share (around 1 percentage point each). The position of other operators remains relatively unchanged, with either a marginal increase (green) or decrease (red) of less than one percentage point.

The HHI is 46% (turnover), indicating high market concentration, which is unchanged from the previous year. The concentration ratio is 98%, which is a decrease of one percentage point over the year. The C2X market is the segment with the highest market concentration – the market is in essence concentrated in four companies. This reflects the fact that the consumer segment is a relatively complex segment, with both a larger number, and more heterogeneous, senders. Despite this we have seen increased competitive pressure from new operators in recent years.

⁸ Market shares differ when compared to the previous year due to some C2C services being incorrectly reported as B2C services in previous years.

Looking instead at indicators based on volume, we see a similar picture, but Postnord has strengthened its position to a greater extent, while Schenker has lost to a greater extent and Airmee has increased to a slightly lesser extent.

3.10 Market concentration: concluding remarks

In this chapter, PTS has examined the degree of market concentration and competition in the Swedish parcel market. We have looked at three concentration indicators: the concentration index HHI; the combined market share of the four largest companies (CR4); and the market share of the largest company (Postnord). We have also examined two indicators of stability, the development of which over time may be an indication of the intensity of competition: the number of active companies and the proportion of market share reallocation (instability index).

Table 13: Development of the concentration and stability indicators over time (2018–2023)

HHI (turnover)						
	2018	2019	2020	2021	2022	2023
Domestic	38%	37%	34%	33%	32%	30%
Incoming	22%	23%	24%	23%	20%	22%
Outgoing	22%	23%	22%	21%	22%	22%
<i>Distributed in SE</i>	<i>31%</i>	<i>30%</i>	<i>28%</i>	<i>27%</i>	<i>26%</i>	<i>27%</i>
Total market	25%	24%	23%	22%	21%	22%

HHI (volume)						
	2018	2019	2020	2021	2022	2023
Domestic	44%	42%	34%	31%	30%	31%
Incoming	43%	39%	43%	42%	37%	29%
Outgoing	30%	29%	26%	25%	24%	24%
<i>Distributed in SE</i>	<i>43%</i>	<i>41%</i>	<i>35%</i>	<i>32%</i>	<i>31%</i>	<i>30%</i>
Total market	39%	37%	32%	30%	29%	28%

CR4 (four largest companies) (turnover)						
	2018	2019	2020	2021	2022	2023
Domestic	92%	92%	86%	84%	87%	85%
Incoming	87%	87%	88%	86%	83%	83%
Outgoing	85%	86%	86%	85%	85%	87%
<i>Distributed in SE</i>	<i>86%</i>	<i>86%</i>	<i>82%</i>	<i>78%</i>	<i>78%</i>	<i>77%</i>
Total market	81%	81%	78%	75%	74%	75%

CR4 (four largest companies) (volume)						
	2018	2019	2020	2021	2022	2023
Domestic	96%	94%	87%	81%	84%	83%
Incoming	93%	92%	92%	92%	88%	82%
Outgoing	92%	94%	91%	89%	87%	87%
<i>Distributed in SE</i>	<i>93%</i>	<i>91%</i>	<i>84%</i>	<i>79%</i>	<i>81%</i>	<i>79%</i>
Total market	90%	89%	82%	76%	78%	77%

CR1 (largest company) (turnover)						
	2018	2019	2020	2021	2022	2023
Domestic	55-60%	-1	-2	0	-1	-2
Incoming	25-30%	-2	6	-4	-2	13
Outgoing	25-30%	0	-2	-1	-1	1
<i>Distributed in SE</i>	<i>50-55%</i>	<i>-2</i>	<i>0</i>	<i>-1</i>	<i>-1</i>	<i>1</i>
Total market	40-45%	-1	-1	-1	-1	1

CR1 (largest company) (volume)						
	2018	2019	2020	2021	2022	2023
Domestic	60-65%	-1	-6	-3	-1	1
Incoming	60-65%	-3	4	-1	-5	-8
Outgoing	45-50%	-2	-6	0	-1	0
<i>Distributed in SE</i>	<i>60-65%</i>	<i>-2</i>	<i>-4</i>	<i>-2</i>	<i>-2</i>	<i>-1</i>
Total market	55-60%	-2	-4	-2	-2	0

Instability index (turnover)					
	2019	2020	2021	2022	2023
Domestic	3	9	12	7	5
Incoming	15	12	9	8	29
Outgoing	11	6	6	5	4
<i>Distributed in SE</i>	<i>6</i>	<i>7</i>	<i>11</i>	<i>8</i>	<i>5</i>
Total market	4	5	8	6	5

Instability index (volume)					
	2019	2020	2021	2022	2023
Domestic	4	13	18	9	6
Incoming	6	9	4	8	19
Outgoing	9	10	5	5	2
<i>Distributed in SE</i>	<i>4</i>	<i>10</i>	<i>16</i>	<i>9</i>	<i>5</i>
Total market	4	9	14	8	4

Number of companies (turnover)						
	2018	2019	2020	2021	2022	2023
Domestic	12	12	15	15	14	15
Incoming	9	9	10	11	11	11
Outgoing	10	10	11	13	11	12
<i>Distributed in SE</i>	<i>13</i>	<i>13</i>	<i>16</i>	<i>16</i>	<i>15</i>	<i>16</i>
Total market	12	12	15	15	14	15

Number of companies (volume)						
	2018	2019	2020	2021	2022	2023
Domestic	12	12	15	15	14	15
Incoming	9	9	10	11	11	11
Outgoing	10	10	11	13	11	12
<i>Distributed in SE</i>	<i>13</i>	<i>13</i>	<i>16</i>	<i>16</i>	<i>15</i>	<i>16</i>
Total market	12	12	15	15	14	15

The analysis shows that there is a high degree of market concentration (HHI) in the domestic market, which however continuously has declined over the period 2018–2023.

In the import and export markets, concentration is significantly lower (in terms of turnover), but has remained relatively stable at just over 20%. In terms of volume, concentration is instead higher but has also fallen to a greater extent over time.

The concentration ratio (CR4) shows that the combined market share of the four largest companies in the market has decreased over the period 2018–2023 in most submarkets, which implies a shift in market power from the larger companies in favour of the smaller companies in the market.

Postnord is still the largest operator in all submarkets, except in the export market, where UPS has a larger share of in terms of turnover. Since 2018, Postnord has lost market share relatively continuously in all submarkets in terms of volume. The exception is the upswing in turnover in the import market in 2023, which can be attributed to a shift in the company's product mix during the year.

The degree of market share reallocation (instability index) was generally higher during the pandemic years, especially in the domestic market, but has since stabilised. The exception is the import market, which saw a high degree of reallocation in 2023.

Since 2018, the number of active companies has grown at a steady pace in all submarkets, which reflects the fact that the parcel market is a growing market. At the same time, there has also been a tendency towards increased consolidation of already existing players, which often can be a sign of a market in a more mature phase.

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

4. The market at the regional and local level

4.1 Introduction

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 for parcel distribution. Examples of such areas are extensive forest and mountain areas, as well as archipelagos and islands where there are sometimes no fixed land connections or ferry services. To provide a more complete market picture, it is important to include this dimension in the market analysis by aggregating and analysing volumes at the regional and local level.

This year, parcel distributors have been asked to report volume data for parcels delivered within Sweden in 2023 by business segment and by five-digit postcode (i.e. the full postcode with all five-digit positions). This is a development of the data since last year's data collection, when data could only be compiled at the three-digit postcode level. This has enabled PTS to analyse the overall parcel market at all levels and segments, irrespective of whether the parcels were distributed within a letter delivery network or within the more typical parcel delivery channels: delivery to an agent/service point, parcel box/locker or home/business delivery to the door.

The reporting by full postcodes allows a high degree of precision in analysing how far out into the country competition extends in the sense that different distributors have actually delivered parcels to recipients in the respective postcode areas. However, the high level of detail implies a certain degree of uncertainty. The uncertainty is primarily due to an inability of the distributors' systems to always capture postcode data for all types of postal items, or to the fact that information is retrieved from customer systems that tolerate the input of incorrect postcodes. This means that volumes may be underestimated for some postcodes, which in turn can have a significant impact on market shares, particularly in more sparsely populated areas where volumes are generally lower per postcode. In addition, not all distributors have been able to distinguish business segments down to the level of full postcodes, which can make it difficult to compare market shares by business segment at a low level. In addition, there is an uncertainty in the postcodes themselves in that there is an annual update of the postcode classification in March, and in that minor adjustments are made to the postcode classification throughout the year. Old postcodes/postal addresses also remain valid during a transitional period.

In this year's processing and analysis, PTS has compiled data at the following levels.

Table 14: Analysis levels (geography)

Analysis level	Number
Counties	21
Municipalities	290
Postcode, 3 digits (123)	551
Postcode, 5 digits (123 45)	10 762

Based on the above reasoning, PTS finds that the three highest levels are suitable for calculating market shares in total and per business segment,⁹ while the lowest level is primarily suitable for assessing each distributor's commercial reach, i.e. in which parts of the country the company's delivery services can be carried out in practice and are sufficiently interesting to be in demand.

⁹ However, with the reservation that in individual cases there are return flows, etc. in a specific area that may distort the local market picture. This is not something that should affect the whole, but it is an area where PTS intends to improve the quality of the data collected and separate out deviating flows to improve reliability.

4.2 Service and local presence

Before discussing market shares at different regional and local levels, we will first briefly describe how parcel deliveries are provided and executed, as well as the reach of the different distributors.

Table 15: Statistics on deliveries performed at the regional and local level in 2023¹⁰

Distributors ¹¹	Number of counties 21 in total	Number of municipalities 290 in total	Number and coverage of postcodes (3 digits) 551 in total	Coverage of postcodes ¹² (5 digits) approx. 10,780 in total
Airmee	16	141	296 53,7%	55%
Best	20	168	353 64,1%	60%
Bring	21	290	551 100%	100%
Bussgods ¹³	21	290	550 99,8%	65%
Citymail	11	154	269 48,8%	50%
DHL ¹⁴	21	290	551 100%	100%
Early Bird ¹⁵	21	290	542 98,4%	95%
FedEx Express	21	290	551 100%	99%
Instabee	21	290	551 100%	99%
Postnord	21	290	551 100%	100%
Schenker	21	290	551 100%	100%
UPS	21	290	551 100%	99%

We can see here that in all of the approximately 10,780 postcodes in 2023, parcels were delivered by at least 4 different parcel distributors. In a majority of the country's postcode areas, at least 10 operators were active:

¹⁰ Based on total volumes irrespective of segment (B2C, B2B, C2X) and refers to deliveries made within each geographical category. Thus, the table does not take into account the number of parcels delivered, but rather only reports that the respective distributor delivered parcels within the area during the year.

¹¹ DSV and Jetpak have not been able to provide sufficiently detailed information to be included in this compilation.

¹² The proportion is reported rounded to 5 percentage points (5 distributors) in addition to complete coverage 100% (4 distributors) and "almost complete coverage" 99% (3 distributors).

¹³ Bussgods (including Sverigefrakt) operates mainly in the four northernmost counties (69 municipalities), but delivers to all counties and all municipalities (see also compilation/statistics regarding agents).

¹⁴ Includes DHL Express and DHL Freight

¹⁵ The underlying companies (Bonway, NWT, Point Logistik, Premo, Sv. Hemleverans, TAB, VTD) report individually, but are reported together here. To a limited extent, they may also distribute parcel letters under their own brand, but these are reported here as Early Bird.

Table 16: Number of operators per postcode

Number of operators per postcode (5 digits)	Number of postcodes (5 digits)	Proportion
4	32	0,3%
5-9	1 445	13,4%
10-14	9 284	86,3%
Total	10 761	100%

This means that competition reaches even the most remote parts of the country. However, this does not exclude the possibility that there are individual addresses for which the delivery options offered by the market do not fully meet the needs. If we also consider actual market shares, which we return to in the next section, it is clear that although the designated nationwide postal service provider Postnord is not alone in delivering parcels in any single postcode in the country, its market shares tend to be higher the more remote a municipality is in relation to larger urban areas and/or the sparser the population density.

Moreover, the statistics do not indicate the possibilities to send parcels from the respective areas. However, in terms of the possibilities to send parcels, especially for the general public and small businesses, the networks of fixed service points play an important role (in addition to the fact that agents and other fixed service points are the main channel for delivering parcels).¹⁶

The following compilation was previously published in full in the PTS report “Svensk postmarknad 2024” [The Swedish postal market 2024].¹⁷

¹⁶ See e.g. E-barometern 2023 Q2

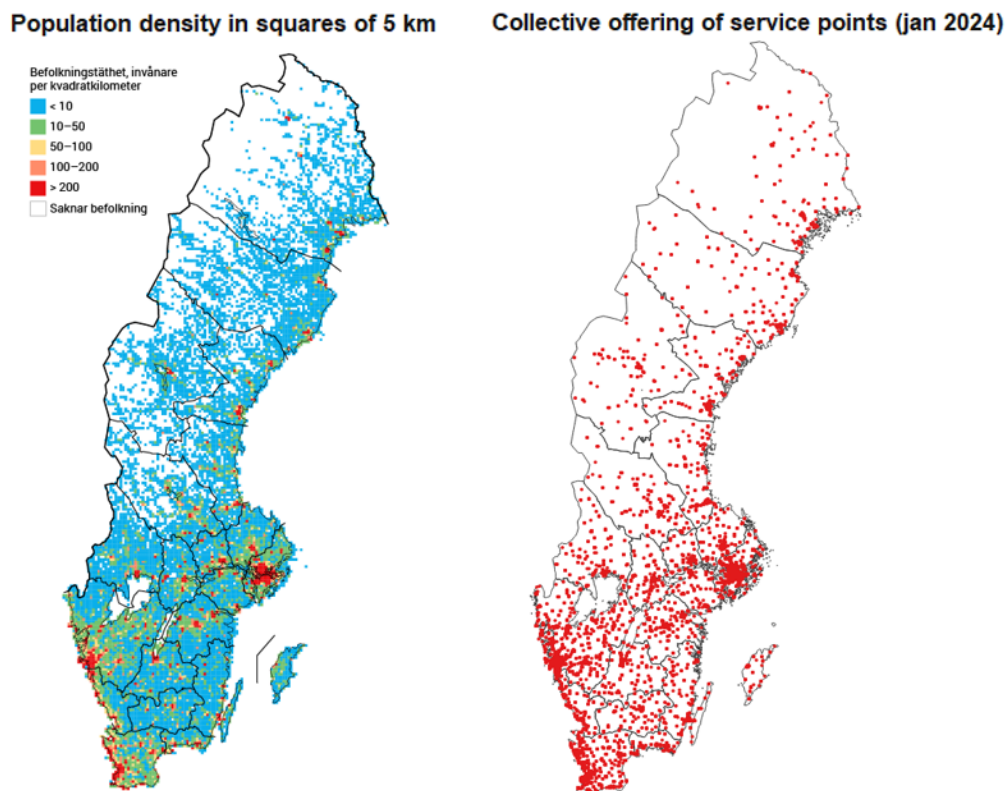
¹⁷ PTS-ER-2024:2

Table 17: Number of service points per distributor and geographical coverage in January 2024

Distributor	Number of service points 2024 (January)	Geographical coverage 2024	
		Number of counties	Number of municipalities
Bring, total	1 974	21	290
Parcel locker/box	286		
Parcel agent	1688		
Bussgods, total	255	21	112
Parcel agent	255		
DHL, total	1893	21	290
Parcel agent	1868		
Parcel locker/box	25		
Instabee, total	2915	21	290
Parcel locker/box	2915		
Postnord, total	4601	21	290
Parcel locker/box	2445		
Business centre	192		
Post agent	1594		
Delivery point	370		
Schenker, total	1630	21	290
Parcel agent	1630		
UPS, total	616	20	191
Parcel agent	616		

6 out of 7 of the distributors with fixed service networks are established in all 21 counties, and 5 of these are also in all 290 municipalities. The establishment of fixed service points is clearly linked to population density, which becomes clear when comparing the total establishment of service points and population density in different parts of the country:

Figure 3: Population density in relation to the location of service points



The Swedish Agency for Economic and Regional Growth (Tillväxtverket) has devised a classification of municipalities based on the extent to which the population lives in urban or rural areas and how far the municipality is located relative to an urban area of at least 50,000 inhabitants. This classification provides a good basis for analysing access to services from the various market operators.¹⁸

Table 18: Population and number of service points by municipality type

Population and number of service points by municipality type							
	1. Metropolitan municipalities	2. Densely populated municipalities near a major city	3. Densely populated municipalities located in a remote area	4. Rural municipalities near a major city	5. Rural municipalities located in a remote area	6. Rural municipalities located in a very remote area	Total
Population as of 31 December 2023	3 454 937	4 200 252	765 531	1 260 349	793 653	76 985	10 551 707
	33%	40%	7%	12%	8%	1%	100%
Total number of service points Jan 2024	4 057	5 365	1 042	1 761	1 359	297	13 881
	29%	39%	8%	13%	10%	2%	100%

The number of established service points per municipality type in relation to the distribution of the population shows that, for the market as a whole as well as for most individual operators, the number of established agents correlates very clearly with population size. However, the establishment of service points is not related to the physical size of the municipality, which means that the more remote and sparsely populated the municipality is (types 5 and 6 in particular), the longer the distances that recipients have to travel to reach the nearest agent tend to be.¹⁹

The establishment of service points is also clearly linked to the location of other essential services. The maps²⁰ below show service points for post²¹ and groceries in Norrbotten, which is the county with the lowest availability.²² As the maps show, service points for post are generally co-located with service points for groceries.

¹⁸ See Appendix 1 for more detailed descriptions.

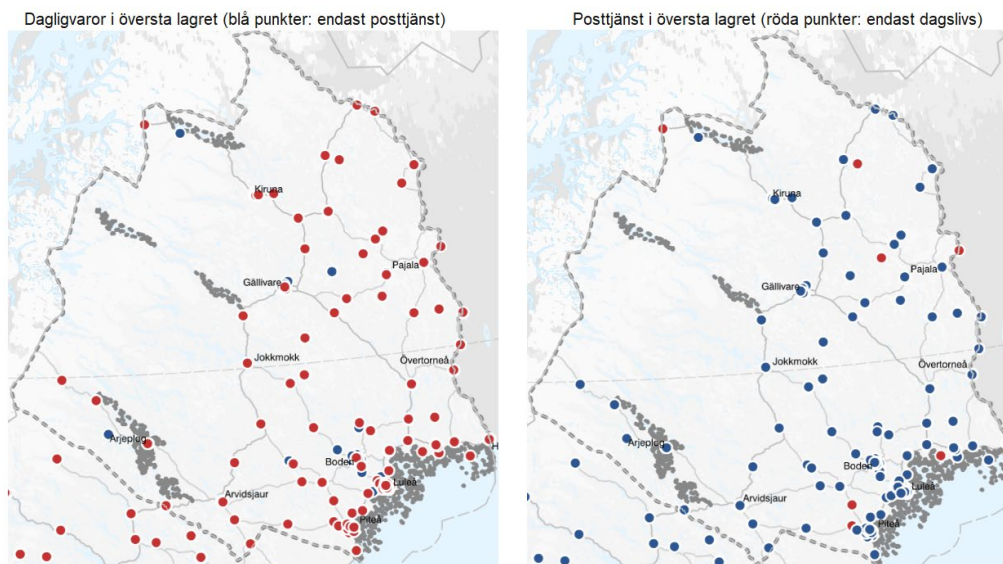
¹⁹ See Appendix 2 for complete tables.

²⁰ Maps created in the Swedish Agency for Economic and Regional Growth's Pupos service analysis on 22 August 2024. In the analysis, we chose "groceries (full offering)" as a proxy for places that users still need to pass with some regularity.

²¹ Service points for post include: delivery points, parcel agents, parcel boxes/lockers, business centres

²² According to the Swedish Agency for Economic and Regional Growth's Pupos service analysis, this county has the greatest number of people with a very long distance to a service point for post and groceries.

Figure 4: Comparison of postal service and grocery availability outside of urban areas



In the left image above, groceries (red dots) are on the top map layer, and in the right image, postal services (blue dots) are on top. Thus, blue dots in the left image illustrate points where there is only postal service (but no groceries), while red dots in the right image show where there are only groceries (but no postal service). As the analysis shows, there are very few points where there is only postal service or only groceries. So, although distances to postal services are generally longer outside urban areas, availability is normally not worse than that of other essential services such as groceries.

If we look at the establishment of service points in relation to delivered volumes, other market operators have a higher proportion of service points than Postnord, and to some extent also in purely numerical terms. In contrast, Postnord offers supplementary postal services in rural areas, small towns and some smaller urban areas through its rural postal and parcel delivery service, where recipients can have parcels delivered from the respective agent to the recipient's address or to the mailbox, depending on the geographical conditions.

One company that may be interesting to mention in this context is Bussgods, which operates mainly in the four northernmost counties and has a high proportion of its service points established in the more remote municipalities (see also Appendix 2). Although the company's volumes are negligible at the national level, it has significant market shares in a few postcode areas and probably fulfils an important function for residents and businesses operating in the areas in which it is active.

4.3 Local market shares

If we break down reported volumes at the regional and local level, from county 21 areas to five-digit postcodes, just over 10,700 areas, the picture is quite clear. Irrespective of the analysis level with choose, the market and competition extend throughout the whole country, but the more sparsely populated and the more remote the area, the greater the share of delivered volumes that Postnord has. However, as PTS previously noted, there is no postcode where the company is the only one to have delivered parcels in 2023, but there are at least four distributors that have been active in all postcode areas.

At county level, the differences between the various counties are not so great, although Postnord tends to have a slightly higher market share in Jämtland and Norrbotten, and to some extent in Västernorrland, Västerbotten and Gotland.

Table 19: Market shares (volume) at the county level

County	Proportion of total volumes, Postnord	Proportion of total volumes, Other operators
1. Stockholm	48%	52%
3. Uppsala	51%	49%
4. Södermanland	52%	48%
5. Östergötland	51%	49%
6. Jönköping	50%	50%
7. Kronoberg	53%	47%
8. Kalmar	53%	47%
9. Gotland	55%	45%
10. Blekinge	52%	48%
12. Skåne	49%	51%
13. Halland	52%	48%
14. Västra Götaland	50%	50%
17. Värmland	53%	47%
18. Örebro	49%	51%
19. Västmanland	50%	50%
20. Dalarna	52%	48%
21. Gävleborg	53%	47%
22. Västernorrland	55%	45%
23. Jämtland	59%	41%
24. Västerbotten	54%	46%
25. Norrbotten	57%	43%
Total	51%	49%

At the municipal level, Postnord's market shares are mainly between 40 and 60% and are lower in only one²³ municipality and higher in twelve²⁴ municipalities. Going down one level lower to three digits of the postcode (3 digits)²⁵, there are slightly more areas that stand out in one direction or the other. However, in the absolute majority of municipalities, market shares are close to the national market share.

Table 20: Market shares (volume), Postnord at the municipal level

Postnord's market share, municipal level	Number of municipalities	Postnord's market share per postcode (3 digits)	Number of postcodes (3 digits)
0%-20%	0	0%-20%	1
20%-40%	1	20%-40%	6
40%-60%	277	40%-60%	510
60%-80%	12	60%-80%	32
80%-100%	0	80%-100%	2

At the 3-digit (postcode) level, there is also no area in which the market shares deviate significantly from the national market share.²⁶

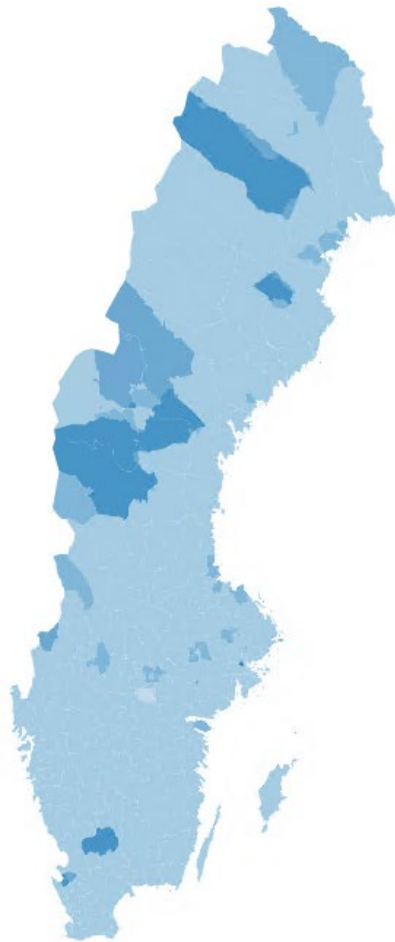
²³ Burlöv, probably an effect of DHL having a terminal here and that return flows and the like are included in the reporting.

²⁴ Järfälla, Ljungby, Ängelholm, Eda, Ragunda, Bräcke, Krokoms, Strömsund, Berg, Härjedalen, Norsjö, Jokkmokk

²⁵ Refers to categorisation based on the first three digits of the respective postcode, e.g. 123 (xx).

²⁶ For example, there is no area in which Postnord's market share is lower than 5% or higher than 95% (which in practice would mean that Postnord is basically absent or alone, respectively). The same appears to be true at the 5-digit level, but given the uncertainty at the detailed level of volume reporting in over 10,700 areas, it is difficult to draw overly far-reaching conclusions beyond that Postnord tends to have a stronger position the more remote and sparsely populated the postcode areas are, but that there are no areas to any extent in which Postnord is the only operator.

Figure 5: Map, Postnord's market shares per municipality and postcode (3 digits)



This map shows Postnord's market shares based on the above table, where the market share per municipality and 3-digit postcode area is shown in five different classes.

The map combines market shares per municipality with market shares per 3-position postcode area (551 areas) to give a clearer picture of Postnord's relative strength compared with other distributors in different parts of the country.

The darker the blue colour, the greater Postnord's proportion of total volumes.

In most of the areas, as noted above, Postnord's market shares are around the national level (40–60%).

Finally, we note that the same pattern emerges when analysing market shares by type of municipality, i.e. that Postnord tends to have a slightly higher market share the more remote (and sparsely populated) the municipality is. It is also interesting to note that, in relation to the various service segments, this tendency is stronger for consumer-related services (B2C and C2X) than for parcel services aimed at businesses (B2B).

Table 21: Market shares (volume), Postnord per municipality type

Municipality type	Volume B2C/C2X		Volumes B2B		Total volumes	
	Proportion, Postnord	Proportion, Others	Proportion, Postnord	Proportion, Others	Proportion, Postnord	Proportion, Others
Metropolitan municipalities	48%	52%	46%	54%	48%	52%
Densely populated municipalities a near major city	52%	48%	51%	49%	52%	48%
Densely populated municipalities located in a remote area	53%	47%	54%	46%	53%	47%
Rural municipalities near a major city	52%	48%	49%	51%	51%	49%
Rural municipalities located in a remote area	54%	46%	54%	46%	54%	46%
Rural municipalities located in a very remote area	62%	38%	57%	43%	58%	42%
TOTAL:	51%	49%	50%	50%	51%	49%

4.4 The market at the regional and local level: concluding remarks

In this chapter, we have examined competition in the Swedish parcel market at the regional and local level. PTS can conclude that the market and competition extend throughout the entire country. Postnord has a somewhat stronger position in sparsely populated and more remote areas, but there is no postcode in which the company is the only one to have delivered parcels; there are at least four distributors that have been active in all postcode areas, and in the vast majority of postcodes there are considerably more operators than this. The establishment of fixed service points is strongly linked to population density, and outside urban areas, service points are almost exclusively co-located with other essential services. In addition, Postnord offers supplementary postal services in rural areas, small towns and certain smaller urban areas through the company's rural postal and parcel delivery service. In conclusion, PTS can state that the statistics collected show that there is well-developed competition that extends far out into the country. ²⁷

²⁷ It should be emphasised, however, that this analysis only refers to the geographical scope of the market, i.e. where different operators delivered packages in 2023 and their respective market shares. However, beyond the division into the three overarching business segments B2B, B2C and C2X (see section 1.2 *Definitions and description of submarkets*), no deeper analysis was performed regarding differences in

the services offered by the market operators. For example, in terms of delivery speed and frequency, delivery and collection conditions, and other price and product conditions.

Appendix 1: Municipality types

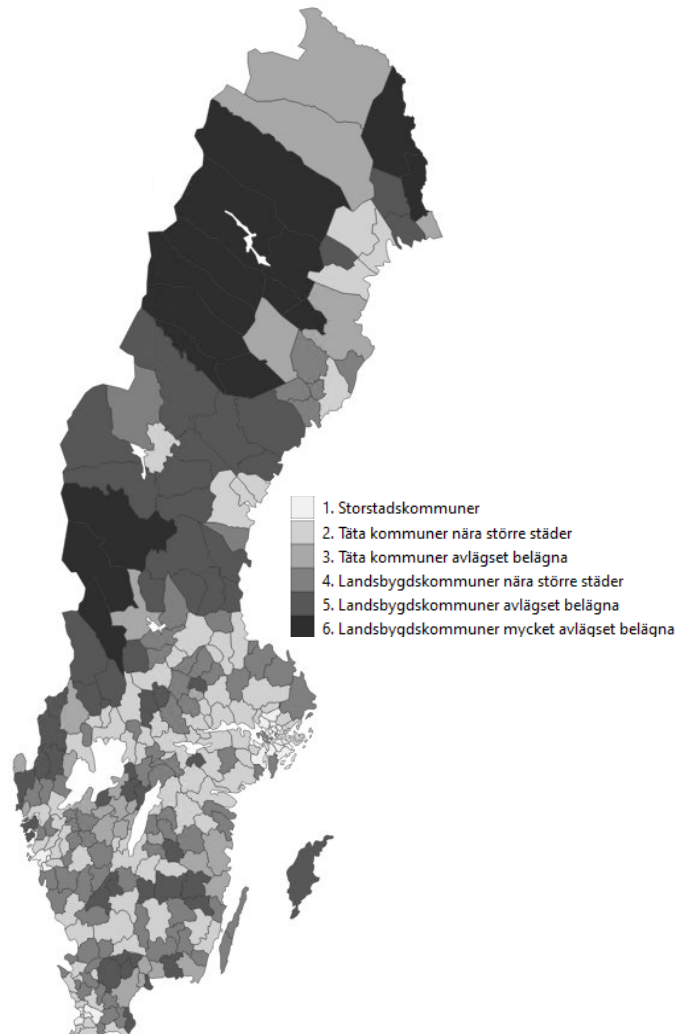
Table 22: Description of division into municipality types

SWEDISH AGENCY FOR ECONOMIC AND REGIONAL GROWTH'S DIVISION INTO MUNICIPALITY TYPES		
Designation	Alternative designation	Description
1. Metropolitan municipalities	Metropolitan municipalities	More than 80 per cent of the population lives in urban areas and, together with neighbouring municipalities, has a combined population of at least 500 000 inhabitants.
2. Densely populated mixed municipalities	Densely populated municipalities near a city	More than 50 per cent of the population lives in urban areas. The majority of the population of the municipality must travel less than 45 minutes by car to reach to an urban area with at least 50,000 inhabitants.
3. Sparsely populated mixed municipalities	Densely populated municipalities located in a remote area	More than 50 per cent of the population lives in urban areas. The majority of the population of the municipality must travel more than 45 minutes by car to reach an urban area with at least 50,000 inhabitants.
4. Rural municipalities close to an urban area	Rural municipalities close to an urban area	More than 50 per cent of the population lives in rural areas. The majority of the population of the municipality must travel less than 45 minutes by car to reach to an urban area with at least 50,000 inhabitants.
5. Sparsely populated rural municipalities	Rural municipalities located in a remote area	More than 50 per cent of the population lives in rural areas. The majority of the population of the municipality must travel more than 45 minutes by car to reach an urban area with at least 50,000 inhabitants.
6. Very sparsely populated rural municipalities	Very sparsely populated rural municipalities	The entire population lives in rural areas. The entire population of the municipality must travel more than 90 minutes by car to reach an urban area with at least 50,000 inhabitants.

Table 23: Population by municipality type

	Municipality type	Population	Share	Median population density
1	City municipality	3 454 937	33%	792.7
2	Dense municipalities, near cities	4 200 252	40%	58.6
3	Dense municipalities, remotely located	765 531	7%	31.6
4	Countryside municipalities, near cities	1 260 349	12%	19.3
5	Countryside municipalities, remotely located	793 653	8%	10.4
6	Countryside municipalities, very remotely located	76 985	1%	0.9
		10 551 707	100%	28.9
				(Medelvärde, riket: 25.9)

Figure 6: Map of different municipality types



Appendix 2: Number of service points, municipality type

Table 24: Number of service points by distributor and municipality type

Distributor	Municipality type 1	Municipality type 2	Municipality type 3	Municipality type 4	Municipality type 5	Municipality type 6	Total ²⁸
Population as of 31 December 2023	3 454 937	4 200 252	765 531	1 260 349	793 653	76 985	10 551 707
	33%	40%	7%	12%	8%	1%	100%
Bring	631	678	133	276	205	51	1 974
	32%	34%	7%	14%	10%	3%	100%
Bussgods	4	58	37	34	67	55	255
	2%	23%	15%	13%	26%	22%	100%
DHL	445	721	154	282	234	57	1 893
	24%	38%	8%	15%	12%	3%	100%
Instabee	872	1 166	239	367	247	21	2 912
	30%	40%	8%	13%	8%	1%	100%
Postnord	1 446	1 924	308	506	359	58	4 601
	31%	42%	7%	11%	8%	1%	100%
Schenker	370	627	139	244	213	37	1 630
	23%	38%	9%	15%	13%	2%	100%
UPS	289	191	32	52	34	18	616
	47%	31%	5%	8%	6%	3%	100%
Total, "Other distributors"	4 057	5 365	1 042	1 761	1 359	297	13 881
	29%	39%	8%	13%	10%	2%	100%
Postnord							
Parcel box/locker	921	1 118	113	194	87	12	2 445
	38%	46%	5%	8%	4%	0%	100%
Business centre	47	74	24	20	23	4	192
	24%	39%	13%	10%	12%	2%	100%
Post agent	338	585	153	260	217	41	1 594
	21%	37%	10%	16%	14%	3%	100%
Delivery point	140	147	18	32	32	1	370
	38%	40%	5%	9%	9%	0%	100%
Total, Postnord	1 446	1 924	308	506	359	58	4 601
	31%	42%	7%	11%	8%	1%	100%

²⁸ The percentages show the relative distribution of the population between the different municipality types, which can be compared with how the total number of service points per operator is distributed between the different municipality types. If we look at Postnord's distribution of service points, these are, in principle, fully proportional to the population per municipality type, while the collective offering of service points for other distributors has a slightly higher proportion in the more remote municipality types