2026-09-18 Report

Report Number
PTS-ER-2026:17

The Swedish Parcel Market 2025

Compilation of data based on PTS' collection of parcel statistics in May 2026

PTS

Report Number
PTS-ER-2026:17

Our reference
25–3853

ISSN
1650–9862

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Foreword

The Swedish Post and Telecom Authority (PTS) is tasked with continuously monitoring developments in the postal market, ensuring that postal services meet society's needs, and promoting effective competition. Since 2018, PTS has served as 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 (the "EU Parcel Regulation"), which has provided PTS with expanded powers to collect data from companies operating in the Swedish parcel market.

The purpose of this report is to describe developments in the Swedish parcel market with regard to growth and market concentration. Starting in 2026, the report also includes a thematic chapter providing an in-depth analysis of a selected area of the parcel market.

Lena Nyberg
Director-General

Executive Summary

PTS notes that growth in the domestic market remained weak in 2025, while both import and export markets continued to grow strongly. Imports from countries outside Europe have declined, while imports from European countries have increased. This shift can partly be explained by proactive market adjustments ahead of the EU's upcoming tightening of customs rules, as well as by companies such as Temu and Shein increasingly establishing warehousing and distribution solutions within the EU. All service segments recorded positive volume growth, with consumer-to-consumer parcels standing out through continued strong development. These developments reflect both the weaker performance of the Swedish economy and continued strong demand for low-cost products and second-hand goods.

PTS statistics generally indicate a growing parcel market, characterized by an increasing number of operators and declining market concentration. The development is not uniform, however. Within the C2X segment, concentration has increased, driven by strong growth.

PTS's analysis shows that competition in the parcel market exists throughout the country, although regional differences remain. PostNord holds a stronger position in sparsely populated and remote areas, while competition is more diversified in larger urban areas. In some remote and sparsely populated locations, service levels and customer choices may be more limited. At the same time, the establishment of competing service networks and parcel lockers has generally improved accessibility to parcel services.

New in this year's report is a thematic chapter on delivery channels. The analysis shows that parcel volumes are distributed differently across delivery channels and operators. Parcel lockers are the most concentrated delivery channel, while collection-point deliveries and home deliveries exhibit a more even distribution of volumes. These differences are consistent with the varying infrastructure and market entry requirements associated with different delivery channels. The results also show that operators' market positions vary across delivery channels, reflecting differences in distribution models, customer offerings, and infrastructure investments.

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1. Introduction

1.1 About the statistics

The Swedish Post and Telecom Authority (PTS) annually collects statistics from parcel delivery service providers operating in the Swedish parcel market. The statistics are collected in accordance with the EU Parcel Regulation[1] and include, among other things, data on volumes and revenue.

The statistics presented in this report were collected in May 2026 and relate to calendar year 2025. This year's report covers 22 individually registered companies[2]. Compared with the previous year (24 companies), DSV Road AB and DB Schenker AB have merged into DSV Road AB. In addition, ICA Paket AB has ceased operations. Best Transport AB discontinued its B2C operations in May 2025 and therefore reports data up to that point.

For the market analysis, statistics for companies belonging to the same corporate group have been aggregated to the parent company level. The seven distributors[3] operating within the Early Bird collaboration have been aggregated into a single entity referred to as "Early Bird". Furthermore, DHL Freight and DHL Express have been aggregated into "DHL". Following this aggregation, 16 companies remain in the analysis.

Data from Bonway AB is missing in this year’s data collection. Its aggregate volume and revenue figures have therefore been estimated based on data submitted during the January data collection.

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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

[2] See list of parcel delivery operators on the PTS website, https://www.pts.se/sv/bransch/post/paketleverantorer/

[3] The following seven companies are collaborating under the umbrella of Early Bird AB: Bonway AB (former Hall Media Logistik, Nim Distribution, Prolog KB, Tidningstjänst AB), Erna logistik AB (former NWT distribution), Point Logistik, Pressens Morgontjänst, Svensk Hemleverans HB, Svensk Hemleverans Norr, Västsvensk tidningsdistribution

1.2 Definitions and description of submarkets and segments

The statistics presented in this report follow the definitions established in the EU Parcel Regulation and the Commission Implementing Regulation[4]:

- **Parcel**: A parcel is defined as any postal item other than an item of correspondence that contains goods, with or without commercial value, and weighing no more than 31.5 kg. This definition includes all consignments meeting the criteria, regardless of whether they are distributed through a parcel logistics network or delivered as a **"packet"** together with mail, newspapers, or advertising material.
- **Domestic Parcel Delivery Services ("Domestic")**: Parcels delivered from a sender in Sweden to a recipient in Sweden.
- **Incoming Cross-Border Parcel Delivery Services (”Import”)**: Parcels delivered from abroad to Sweden.
- **Outgoing Cross-Border Parcel Delivery Services ("Export")**: Parcels delivered from Sweden to destinations abroad.

Based on these definitions, five submarkets are analysed:

- **Total market**: sum of domestic, import and export
- **Parcels distributed in Sweden**: sum of domestic and import
- **Domestic** – domestic as defined above
- **Import** – import as defined above
- **Export** – export as defined above

The submarket *Parcels distributed in Sweden* is further divided into the following segments:

- **B2C market**: Parcels sent from businesses to consumers, for example goods purchased through e-commerce.
- **B2B market**: Parcels sent from businesses to other businesses. This data collection covers single piece consignments.
- **C2X market**: Parcels sent from consumers to any type of recipient, e.g. from one private sender to another; from a seller to a buyer following a purchase on an online platform (e.g. Tradera); and e-commerce returns from consumers to businesses.

[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

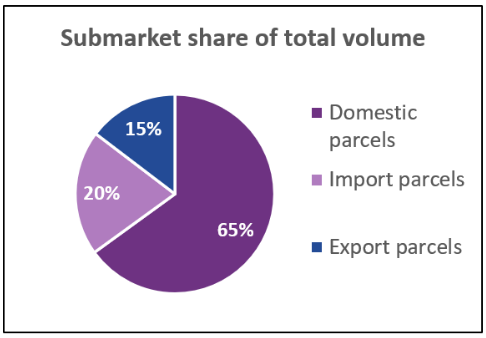
It should be noted that operators' internal systems cannot always distinguish parcel flows according to the categories described above. For example, returns may in some cases be recorded as B2C shipments. Similarly, some B2C flows may contain a proportion of C2C shipments where distributors deliver parcels on behalf of another carrier and are unable to identify the underlying sender-recipient relationship.

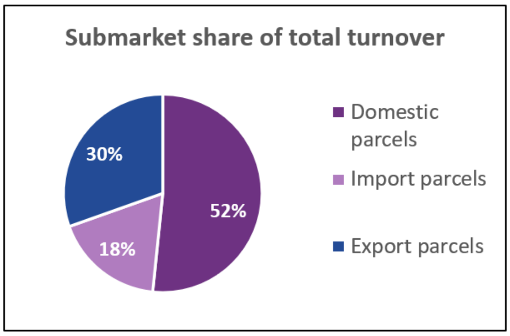
2. Parcel Market Submarkets and Market Developments in 2025

2.1 Parcel market submarkets

The largest segment of the Swedish parcel market, measured by the number of parcels distributed, is the domestic market, accounting for 65 per cent of total parcel volumes. This is followed by import parcels (20 per cent) and export parcels (15 per cent). When measured by revenue instead of volume, imports and exports account for a larger share of the market, reflecting higher average prices in these segments, particularly for export shipments.

Figure 1: Domestic, import and export as a share of total volumes and turnover

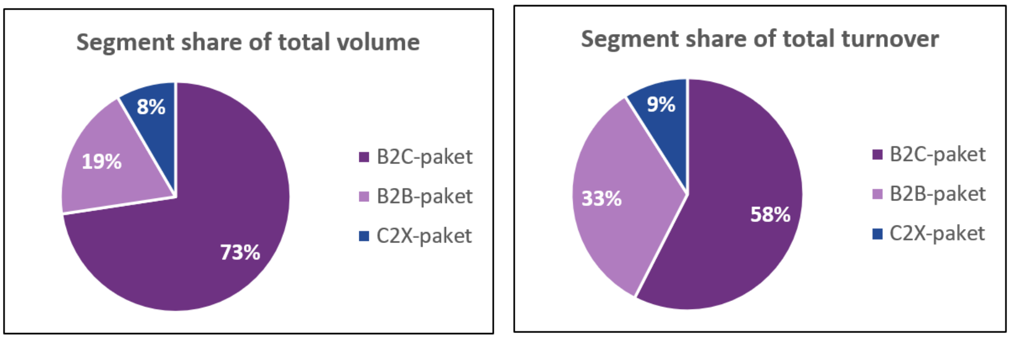




2.2 Service segments (parcels distributed in Sweden)

The parcel market is commonly divided into three main service segments. B2C parcels constitute the largest segment, accounting for 72 per cent of all parcels delivered in Sweden. B2B parcels account for 19 per cent, while C2X parcels represent 9 per cent. When measured by revenue, the B2B segment accounts for a substantially larger share of the market, reflecting the generally higher prices charged for business parcel services.

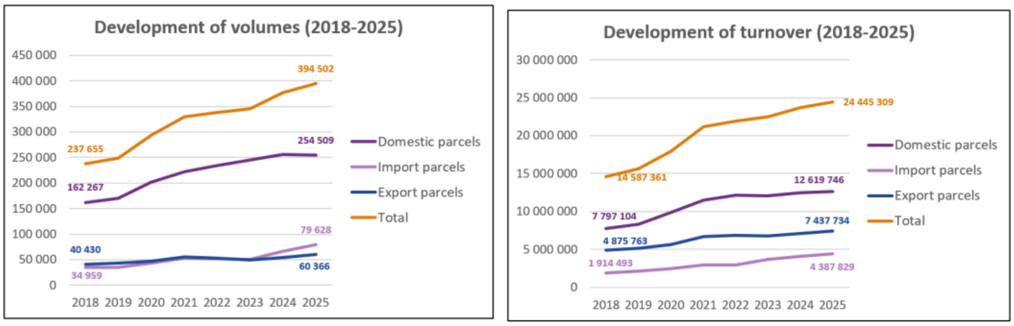
Figure 2: B2C, B2B and C2X as a share of total volume and turnover (Parcels distributed in Sweden)



2.3 Development of volumes and revenue over time (2018–2025)

Between 2018 and 2025, the Swedish parcel market expanded in both volume and revenue terms. Measured by parcel volumes, the domestic market grew by 57 %, the import market by 127 % and the export market by 49 %. Measured instead by revenue, the domestic market grew by 62 % the import market by 119 % and the export market by 49 %.

Figure 3: Development of volumes and revenue over time, in thousands of parcels and SEK (2018–2025)



2.4 Parcel market development in 2025

During 2025, a total of 395 million parcels were distributed in the Swedish parcel market. Of these, 334 million parcels were delivered in Sweden, corresponding to the combined total of domestic and import parcels. Domestic parcel volumes amounted to 255 million parcels, imports to 80 million parcels, and exports to 60 million parcels.

Total market revenue amounted to approximately SEK 24 billion in 2025, of which approximately SEK 17 billion related to parcels delivered in Sweden. Revenue from domestic parcel delivery services amounted to approximately SEK 13 billion, imports generated approximately SEK 4 billion, and exports approximately SEK 7 billion.

Table 1: Parcel market growth in 2025

	Outcome 2025		Growth 2024-2025	
Submarket:	**Turnover (bn)**	**Volumes (m)**	**Turnover**	**Volumes**
Domestic parcels	13	255	1%	-1%
Import parcels	4	80	6%	21%
Export parcels	7	60	4%	10%
Total	**24**	**395**	**3%**	**5%**
Distributed in Sweden*	**17**	**334**	**2%**	**4%**

** Distributed in Sweden = Sum of domestic and import*

In 2025, the total market grew by approximately 5 per cent in volume terms and 3 per cent in revenue terms. For parcels delivered in Sweden, growth amounted to 4 per cent in volume terms and 2 per cent in revenue terms.

Volume growth in the domestic market was negative during the year. This may be linked to the weak performance of the Swedish economy and subdued household purchasing power resulting from inflation and the economic downturn. Another possible explanation is that domestic parcel volumes have, to some extent, been displaced by increased imports from international low-cost e-commerce platforms such as Temu and Shein.

At the same time, both the import and export markets continued to grow strongly. Imports from countries outside the EU declined, while imports from EU countries increased. This development may partly be explained by proactive market adaptations to tighter EU customs regulations, including the abolition of the duty-free exemption for goods valued below EUR 150 in July 2026. The trend also reflects how companies such as Temu and Shein have adapted their business models and logistics chains by establishing warehousing and distribution capacity within the EU.

The submarket for parcels delivered in Sweden recorded solid growth during the year, driven primarily by strong increases in import parcels and C2X parcels.

In summary, all submarkets except the domestic market recorded strong volume growth in 2025. The development reflects the continued strength of both the low-price retail trend and the second-hand market.

3. Measures of Market Concentration

3.1 Introduction

This chapter defines the measures of market concentration used in the market analyses presented in Chapter 4 (The National Market) and Chapter 6 (The Regional and Local Market).

3.2 Market shares

Market shares are typically calculated on the basis of value (e.g. revenue), as this is generally considered a good indicator of a company's ability to overcome market barriers and offer products that are attractive to consumers. An exception is markets characterized by highly homogeneous products, where volume-based market shares may provide a more accurate representation. In such markets, a company offering a lower-priced product may have a significant impact on competition and capture substantial volumes without necessarily generating equally large revenues. [5]

The parcel market consists of several submarkets and service segments[6] in which both basic standard services and premium[7] services are offered using different pricing models and delivery solutions. This complexity makes it difficult to analyse the market solely on the basis of either revenue or volume. To provide as comprehensive a picture as possible, this report presents market shares based on both revenue and volume.

3.3 Concentration ratio (CR4)

The concentration ratio is calculated as the sum of the market shares of the *n* largest firms in a market. A commonly used measure is the concentration ratio of the four largest firms (CR4). If CR4 exceeds 60 per cent, the market is generally considered

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[5] Busu (2012), "An economic analysis of the degree of market concentration: Competition indicators"; Department of Justice & FTC (2010), Horizontal Merger Guidelines

[6] In addition to submarkets like B2B, B2C, and C2X, this can involve different types of customer segments within each respective submarket, etc. Cross-border shipments are also affected by international agreements and tariffs, which further complicates the picture.

[7] For example, delivery times and mode of delivery

an oligopoly, with or without a dominant firm. If CR1 (the market share of the largest firm) exceeds 90 per cent, the market is generally considered a monopoly. [8]

Table 2: Interpretation of CR4

Index value:	Interpretation:	Description:
CR4 = 0	Perfect Competition	Full competition among many operators
0 < CR4 < 40	Monopolistic Competition	Many operators, none dominant
40 ≤ CR4 < 60	Loose Oligopoly	A small number of larger operators
CR4 ≥ 60	Tight Oligopoly	A few operators dominate
CR1 ≥ 90	Effective Monopoly	One operator effectively dominates the entire market

3.4 Herfindahl-Hirschman Index (HHI)

Herfindahl-Hirschman Index (HHI) is a measure of market concentration calculated as the sum of the squared market shares of all firms in a market. An increase in HHI is generally interpreted as an increase in market concentration and, consequently, a reduction in competition. However, the measure should always be interpreted within its broader market context, since a higher HHI may also reflect a redistribution of market shares towards more efficient firms.[9]

As a rule of thumb, an HHI below 1,500 (15%) indicates low market concentration, an HHI between 1,500 and 2,500 (15-25%) indicates moderate market concentration and an HHI above 2,500 (25%) indicates high market concentration. The maximum possible value is 10,000, corresponding to a market with a single firm holding 100 per cent market share, i.e. a monopoly.[10]

Table 3: Interpretation of the Herfindahl-Hirschman Index

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

[8] Gwin (2001), A guide for industry study and the analysis of firms and competitive strategy
[9] HMG (2020), State of competition: Existing competition indicators
[10] Department of Justice & FTC (2010), Horizontal Merger Guidelines, § 5.3. However, it should be noted that the European Commission appears to have a somewhat stricter interpretation of the HHI. Unlike the DoJ and the FTC, the Commission has not, as far as we know, established a clear and distinct definition of markets in terms of the HHI, which is why we use the definition from the DoJ & FTC (2010). Furthermore, our primary purpose for using the metric is to find an indicator that allows us to track developments over time, and for that purpose, the American definition currently appears to be the best available.

3.5 Instability index

The Instability Index measures changes in the relative positions of firms and is commonly used as an indicator of competitive intensity. The index is calculated as the sum of the absolute changes in market shares over a given period. An index value close to zero indicates that market shares are relatively stable and that little redistribution has occurred among market participants. In contrast, a value approaching one indicates a relatively unstable allocation of market shares, with substantial redistribution between companies. Thus, a higher instability index suggests a greater degree of market share reallocation, which may be indicative of more intense competition.[11]

[11] Sys (2009), Is the container liner shipping industry an oligopoly?

4. The National Market

4.1 Introduction

This chapter presents market shares and a number of concentration indicators for selected submarkets and service segments. For confidentiality reasons, market shares for individual operators are reported in five-percentage-point intervals rather than as exact percentages.

4.2 Market concentration: Total market

The total market (see definitions in Section 1.2) comprises 15 active operators. Of these, nine operators each hold a market share exceeding one per cent when measured by revenue.

PostNord is the largest operator, accounting for 35-40 per cent of market revenue. It is followed by three operators with market shares of 10-15 per cent (UPS, DHL and Bring Parcels), three operators with shares of 5-10 per cent (DSV/Schenker, Instabee and FedEx Express), and two operators with shares of 1-5 per cent (Airmee and Early Bird[12]).

[12] Market shares for "Early Bird" also includes volumes for the respective distributors

Table 4: Market shares and concentration – total market

Company:	Market share (turnover) Total market 2025	
Postnord	35-40%	1
UPS	10-15%	0
DHL	10-15%	0
Bring Parcels	10-15%	0
DSV/Schenker	5-10%	-1
Instabee	5-10%	0
FedEx Express	5-10%	0
Airmee	1-5%	0
Early Bird	1-5%	-1
6 actors <1%	ca 2 % combined	

HHI	**21%**	↑	**(20%)**
CR4 (four largest)	**74%**	↑	**(73%)**
Instability index	**6**	↓	**(7)**

Company:	Market share (volume) Total market 2025	
Postnord	45-50%	2
Instabee	10-15%	1
DHL	5-10%	0
Bring Parcels	5-10%	0
DSV/Schenker	5-10%	-2
Early Bird	1-5%	-3
UPS	1-5%	0
Airmee	1-5%	1
CityMail	1-5%	1
FedEx Express	1-5%	0
5 actors <1%	ca 1 % combined	

HHI	**27%**	↑	**(25%)**
CR4 (four largest)	**78%**	↑	**(74%)**
Instability index	**11**	↑	**(9)**

Note: Change in market shares reported in percentage points. Green=strengthened position, Red=lost market share. Companies <1%: Citymail, Jetpak, Bussgods, Asendia, Best, Velove. (Ranked by turnover)

Compared with the previous year, PostNord strengthened its position by approximately one percentage point in revenue terms. At the same time, DSV/Schenker and Early Bird each lost around one percentage point. The remaining operators maintained largely unchanged positions, recording only marginal increases or decreases of less than one percentage point.

The revenue-based Herfindahl-Hirschman Index (HHI) amounts to 21 per cent, indicating a moderately concentrated market. Compared with the previous year, concentration increased by one percentage point. The concentration ratio (CR4) stands at 74 per cent, indicating an oligopolistic market structure in which a limited number of firms dominate and one operator holds a particularly strong position. CR4 also increased by one percentage point during the year. Overall, this reflects a modest shift in market shares towards the largest market participants.

The Instability Index stands at 6, indicating that market shares equivalent to six percentage points were redistributed during the year. This represents slightly less market share reallocation than in the previous year.

When market shares and concentration measures are instead calculated on the basis of volume, a broadly similar picture emerges. However, both PostNord and

Instabee hold larger market shares in volume terms, whereas DHL, UPS and FedEx hold larger shares when measured by revenue. These differences may be explained by variations in pricing and product mix, including differences between standard and premium services and between parcels and letterbox parcels.

Volume-based measures indicate a higher degree of market concentration than revenue-based measures. At the same time, concentration measured in volume terms has declined more rapidly over time, a trend that is reflected in PostNord's market share as well as in HHI and CR4. During 2025, however, concentration increased slightly, mainly as a result of rising concentration within the C2X segment.

The Instability Index, which measures the degree of market share reallocation among operators, has varied over time. Redistribution was generally greater during the pandemic years, when the parcel market also expanded rapidly, particularly within the premium home-delivery segment. Since then, reallocation has moderated somewhat and has more recently been driven primarily by developments in import flows.

The number of companies active in the market has generally increased over time, although recent years have also seen greater consolidation. During 2025, three major changes occurred: DSV and Schenker merged, ICA Paket ceased operations, and Best Transport discontinued its parcel business.

Table 5: Competition indicators – development over time (2018–25)

	Total market (turnover)								
Indicator:	**2018**	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**	**2025**	**2018-25**
HHI	25%	24%	23%	22%	21%	22%	20%	21%	**-4**
CR4	81%	81%	78%	75%	74%	75%	73%	74%	**-7**
Postnord	40-45%	-1	-1	-1	-1	1	-3	1	**-5**
Instability index	-	4	5	7	7	5	7	6	**-**
No. businesses	13	13	16	16	15	16	17	15	**2**

	Total market (volume)								
Indicator:	**2018**	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**	**2025**	**2018-25**
HHI	39%	37%	33%	30%	29%	28%	25%	27%	**-12**
CR4	90%	89%	83%	77%	78%	77%	74%	78%	**-12**
Postnord	55-60%	-2	-4	-2	-2	0	-4	2	**-12**
Instability index	-	5	8	13	11	4	9	11	**-**
No. businesses	13	13	16	16	15	16	17	15	**2**

Note: HHI=Herfindahl-Hirschman index; CR4=combined market share of the four largest companies

4.3 Market concentration: Distributed in Sweden

The market for parcels delivered in Sweden (see definitions in Section 1.2) comprises 14 active operators. Of these, nine operators hold a market share exceeding one per cent.

PostNord is the largest operator, accounting for 45-50 per cent of market revenue. It is followed by DHL with 10-15 per cent, three operators with market shares of 5-10 per cent (DSV/Schenker, Instabee and Bring Parcels), and four operators with market shares of 1-5 per cent (FedEx, UPS, Airmee and Early Bird).

Table 6: Market shares and concentration – Distributed in Sweden

Company:	Market share (turnover) Distr. in Sweden 2025	
Postnord	45-50%	1
DHL	10-15%	0
DSV/Schenker	5-10%	-1
Instabee	5-10%	0
Bring Parcels	5-10%	1
FedEx Express	1-5%	0
UPS	1-5%	0
Airmee	1-5%	1
Early Bird	1-5%	-2
5 actors <1%	ca 2 % combined	

HHI	**25%**	↑	**(24%)**
CR4 (four largest)	**75%**	↑	**(74%)**
Instability index	**8**	↔	**(8)**

Company:	Market share (volume) Distr. in Sweden 2025	
Postnord	50-55%	3
Instabee	10-15%	1
DHL	5-10%	1
DSV/Schenker	5-10%	-2
Bring Parcels	5-10%	0
Early Bird	5-10%	-4
Airmee	1-5%	1
UPS	1-5%	0
CityMail	1-5%	1
5 actors <1%	ca 2 % combined	

HHI	**29%**	↑	**(27%)**
CR4 (four largest)	**78%**	↑	**(76%)**
Instability index	**12**	↑	**(10)**

Note: Change in market shares reported in percentage points. Green=strengthened position, Red=lost market share. Companies <1%: Best, Citymail, Jetpak, Bussgods, Velove. (Ranked by turnover)

Compared with the previous year, PostNord, Bring Parcels and Airmee each strengthened their positions by approximately one percentage point. Early Bird recorded the largest decline, losing around two percentage points of revenue market share, while DSV/Schenker lost approximately one percentage point. The positions of the remaining operators were largely unchanged.

The Herfindahl-Hirschman Index (HHI) amounts to 25 per cent based on revenue, indicating a moderately concentrated market. This represents an increase of one percentage point from the previous year. The concentration ratio (CR4) also increased by one percentage point, reaching 75 per cent. This suggests that smaller companies have lost some ground relative to the largest operators in the market.

The Instability Index remains unchanged at eight, meaning that market shares equivalent to eight percentage points were redistributed during the year.

Volume-based measures paint a similar picture. Both PostNord's market share and overall market concentration are somewhat higher when measured by volume rather than revenue, although concentration has tended to decline more rapidly over time when measured in volume terms.

The market for parcels delivered in Sweden experienced strong growth during 2025, driven primarily by continued rapid growth in import parcels and C2X parcels.

4.4 Market concentration: Domestic parcels

The domestic parcel market comprises 14 active operators. Of these, seven hold market shares exceeding one per cent when measured by revenue.

PostNord is the largest operator, with a market share of 45-50 per cent. It is followed by DHL and Instabee, each holding 10-15 per cent of the market. DSV/Schenker and Bring Parcels each account for 5-10 per cent, while Early Bird and Airmee each hold 1-5 per cent.

Table 7: Market shares and concentration – Domestic market

Company:	Market share (turnover) Domestic 2025	
Postnord	45-50%	1
DHL	10-15%	0
Instabee	10-15%	1
DSV/Schenker	5-10%	-1
Bring Parcels	5-10%	1
Early Bird	1-5%	-2
Airmee	1-5%	1
7 actors <1%	ca 4 % combined	

Company:	Market share (volume) Domestic 2025	
Postnord	50-55%	0
Instabee	10-15%	1
DHL	10-15%	1
DSV/Schenker	5-10%	-1
Bring Parcels	5-10%	1
Early Bird	5-10%	-3
Airmee	1-5%	1
CityMail	1-5%	0
6 actors <1%	ca 1 % combined	

HHI	**29%**	↑	**(28%)**
CR4 (four largest)	**84%**	↑	**(82%)**
Instability index	**8**	↑	**(7)**

HHI	**30%**	↓	**(29%)**
CR4 (four largest)	**83%**	↔	**(82%)**
Instability index	**9**	↑	**(6)**

Note: Change in market shares reported in percentage points. Green=strengthened position, Red=lost market share. Companies <1%: Best Transport, Jetpak, UPS, Citymail, Bussgods, FedEx, Velove. (Ranked by turnover)

Compared with the previous year, four operators strengthened their positions: PostNord, Instabee, Bring Parcels and Airmee each increased their revenue share by approximately one percentage point. Early Bird lost around two percentage points, while DSV/Schenker lost approximately one percentage point. The remaining operators recorded only marginal changes.

The HHI stands at 29 per cent, indicating high market concentration. Concentration increased by one percentage point during the year. CR4 amounts to 84 per cent, an increase of two percentage points compared with the previous year. Taken together, these developments indicate that the largest firms strengthened their market positions during 2025.

The Instability Index indicates that market shares equivalent to eight percentage points were redistributed during the year, representing slightly greater market-share reallocation than in the previous year.

Volume-based market shares and concentration measures tell a similar story. However, some operators, particularly PostNord and Early Bird, hold larger market shares when measured by volume, reflecting differences in pricing and product mix, including relatively large volumes of parcels distributed as letterbox parcels.

Domestic parcel volumes declined during the year. This is likely explained by weaker economic conditions in Sweden and restrained consumer purchasing power due to inflation and the economic downturn. Another possible explanation is that inexpensive imports from international low-cost e-commerce platforms are increasingly displacing domestic parcel volumes.

4.5 Market concentration: Import

The import market comprises 11 active operators, ten of which hold market shares greater than one per cent.

PostNord is the largest operator, accounting for 30-35 per cent of market revenue. It is followed by FedEx and UPS, each holding 15-20 per cent. Bring Parcels, DSV/Schenker and DHL each account for 5-10 per cent, while Airmee, Instabee, Early Bird and CityMail each hold between 1 and 5 per cent.

Table 8: Market shares and concentration – import

Company:	Market share (turnover) Import 2025	
Postnord	30-35%	1
FedEx Express	15-20%	0
UPS	15-20%	1
Bring Parcels	5-10%	0
DSV/Schenker	5-10%	-1
DHL	5-10%	0
Airmee	1-5%	0
Instabee	1-5%	0
Early Bird	1-5%	-3
CityMail	1-5%	1
1 actors <1%	<1 % combined	

Company:	Market share (volume) Import 2025	
Postnord	50-55%	12
UPS	10-15%	-1
DSV/Schenker	5-10%	-5
Bring Parcels	5-10%	-1
Airmee	5-10%	1
Early Bird	5-10%	-7
CityMail	5-10%	2
Instabee	1-5%	0
FedEx Express	1-5%	0
DHL	1-5%	0
1 actors <1%	<1 % combined	

HHI	**18%**	↑	**(17%)**
CR4 (four largest)	**75%**	↑	**(72%)**
Instability index	**8**	↓	**(16)**

HHI	**29%**	↑	**(20%)**
CR4 (four largest)	**74%**	↔	**(74%)**
Instability index	**30**	↑	**(28)**

Note: Change in market shares reported in percentage points. Green=strengthened position, Red=lost market share. Companies <1%: Jetpak.

Compared with the previous year, and measured by revenue, Early Bird lost approximately three percentage points of market share and DSV/Schenker lost around one percentage point. At the same time, PostNord, UPS and CityMail each increased their market shares by approximately one percentage point.

A different pattern emerges when market shares are measured by volume. PostNord increased its share by twelve percentage points, CityMail by two percentage points and Airmee by one percentage point. Conversely, Early Bird lost seven percentage points and DSV/Schenker lost five percentage points. UPS and Bring Parcels each lost around one percentage point.

The HHI amounts to 18 per cent, indicating moderate market concentration. This represents an increase of one percentage point compared with the previous year. CR4 increased from 72 per cent to 75 per cent, reflecting a modest strengthening of the largest operators.

The import market is the most dynamic submarket of the parcel sector, exhibiting significantly larger fluctuations in market shares than either the domestic or export markets. In recent years, substantial year-to-year market-share shifts have occurred, often when a major e-commerce retailer changes logistics provider or modifies contractual arrangements, such as preferred delivery channels. During 2025, market shares equivalent to 30 percentage points were redistributed when measured by volume and eight percentage points when measured by revenue.

Import volumes continued to increase strongly during the year, particularly from EU countries. This likely reflects the market's adaptation to stricter EU customs regulations, including the abolition of the former duty-free exemption for goods valued below EUR 150. It also reflects adjustments made by companies such as Temu and Shein, including the establishment of warehouses and distribution centres within the European Union.

4.6 Market concentration: Export

The export market comprises 11 active operators. Of these, seven hold market shares exceeding one per cent when measured by revenue.

UPS is the largest operator, accounting for 30-35 per cent of market revenue, followed by PostNord with 20-25 per cent. DHL and Bring Parcels each hold 10-15 per cent, FedEx Express accounts for 5-10 per cent, and DSV/Schenker and Instabee each hold between 1 and 5 per cent.

Table 9: Market shares and concentration – Export

Company:	Market share (turnover) Export 2025	
UPS	30-35%	-1
Postnord	20-25%	1
DHL	10-15%	-1
Bring Parcels	10-15%	-1
FedEx Express	5-10%	1
DSV/Schenker	1-5%	0
Instabee	1-5%	0
4 actors <1%	ca 1 % combined	

HHI	**21%**	↓	**(22%)**
CR4 (four largest)	**85%**	↓	**(86%)**
Instability index	**5**	↓	**(7)**

Company:	Market share (volume) Export 2025	
Postnord	35-40%	0
Bring Parcels	25-30%	0
UPS	10-15%	-1
DHL	5-10%	-1
Instabee	5-10%	1
FedEx Express	1-5%	0
Schenker	1-5%	0
Asendia	1-5%	0
3 actors <1%	<1 % combined	

HHI	**24%**	⇔	**(24%)**
CR4 (four largest)	**85%**	↓	**(86%)**
Instability index	**4**	↓	**(9)**

Note: Change in market shares reported in percentage points. Green=strengthened position, Red=lost market share. Companies <1%: Asendia, Jetpak, Early Bird, Bussgods. (Ranked by turnover)

Compared with the previous year, PostNord and FedEx each increased their revenue-based market shares by approximately one percentage point. UPS, DHL and Bring Parcels each lost approximately one percentage point. The positions of the remaining operators changed only marginally.

The Herfindahl-Hirschman Index declined by one percentage point to 21 per cent, indicating moderate market concentration. CR4 also declined by one percentage point to 85 per cent, reflecting a modest strengthening of the smaller operators. The Instability Index indicates that market shares equivalent to five percentage points were redistributed during the year, representing less reallocation than in the previous year.

A similar picture emerges when concentration is measured by volume, although Postnord's market share and overall concentration are somewhat higher. The differences between revenue-based and volume-based measures are less pronounced in the export market than in other submarkets.

The export market is the most stable of the parcel market's submarkets. Concentration measures and the market shares of the largest operators have changed relatively little over time.

4.7 Market concentration: B2C parcels

The B2C market (see definitions in Section 1.2) comprises 14 active operators. Of these, nine operators hold market shares exceeding one per cent when measured by revenue.

PostNord is the largest operator, accounting for 45-50 per cent of market revenue. It is followed by Instabee with 10-15 per cent. DHL, Bring Parcels and DSV/Schenker each hold market shares of 5-10 per cent, while Early Bird, Airmee, CityMail and UPS each account for between 1 and 5 per cent.

Table 10: Market shares and concentration – B2C parcels

Company:	Market share (turnover) B2C 2025	
Postnord	45-50%	0
Instabee	10-15%	1
DHL	5-10%	0
Bring Parcels	5-10%	0
DSV/Schenker	5-10%	-1
Early Bird	1-5%	-1
Airmee	1-5%	1
CityMail	1-5%	1
UPS	1-5%	0
5 actors <1%	ca 1 % combined	

Company:	Market share (volume) B2C 2025	
Postnord	45-50%	2
Instabee	15-20%	0
Early Bird	5-10%	-2
DHL	5-10%	0
Bring Parcels	5-10%	0
DSV/Schenker	5-10%	-2
Airmee	1-5%	1
CityMail	1-5%	1
6 actors <1%	ca 2 % combined	

HHI	**28%**	⇔	**(28%)**
CR4 (four largest)	**80%**	↑	**(79%)**
Instability index	**8**	↓	**(9)**

HHI	**28%**	↑	**(27%)**
CR4 (four largest)	**80%**	↑	**(79%)**
Instability index	**10**	↑	**(9)**

Note: Change in market shares reported in percentage points. Green=strengthened position, Red=lost market share. Companies <1%: Best Transport, Velove, FedEx, Bussgods, Jetpak. (Ranked by turnover)

Compared with the previous year, Instabee, Airmee and CityMail strengthened their positions by approximately one percentage point each. DSV/Schenker and Early Bird each lost around one percentage point. The remaining operators recorded only marginal changes.

The HHI stands at 28 per cent (revenue basis), indicating a highly concentrated market. This is unchanged from the previous year. The concentration ratio (CR4) increased by one percentage point to 80 per cent, suggesting that the largest operators strengthened their positions during the year.

The Instability Index amounts to 8, indicating that market shares equivalent to eight percentage points were redistributed during the year. This represents less market-share reallocation than in the previous year.

Volume-based measures produce a similar picture, although Instabee holds a larger market share when measured by volume than by revenue.

The B2C market remains relatively concentrated, but concentration has declined significantly over time. The market share of the largest operator has fallen from approximately two-thirds of the market to just under one-half, while the number of operators has increased and market shares have become more evenly distributed.

4.8 Market concentration: B2B parcels

The B2B parcel market comprises nine active operators, eight of which hold market shares exceeding one per cent.

PostNord is the largest operator, with a revenue-based market share of 30-35 per cent, followed by DHL with 15-20 per cent. DSV/Schenker, FedEx and UPS each hold market shares of 10-15 per cent. Bring Parcels accounts for 5-10 per cent, while Jetpak and Bussgods each hold between 1 and 5 per cent.

Table 11: Market shares and concentration – B2B parcels

Company:	Market share (turnover) B2B 2025	
Postnord	30-35%	-2
DHL	15-20%	1
DSV/Schenker	10-15%	1
FedEx Express	10-15%	-1
UPS	10-15%	1
Bring Parcels	5-10%	1
Jetpak	1-5%	0
Bussgods	1-5%	0
1 actors <1%	<1 % combined	

Company:	Market share (volume) B2B 2025	
Postnord	45-50%	-2
DHL	10-15%	0
DSV/Schenker	10-15%	0
UPS	10-15%	0
Bring Parcels	5-10%	1
FedEx Express	1-5%	0
3 actors <1%	ca 1 % combined	

HHI	**19%**	↓	**(20%)**
CR4 (four largest)	**77%**	↔	**(77%)**
Instability index	**8**	↑	**(7)**

HHI	**28%**	↓	**(30%)**
CR4 (four largest)	**86%**	↔	**(86%)**
Instability index	**4**	↑	**(2)**

Note: Change in market shares reported in percentage points. Green=strengthened position, Red=lost market share. Companies <1%: Early Bird.

Compared with the previous year, DHL, DSV/Schenker, UPS and Bring Parcels each strengthened their positions by approximately one percentage point. PostNord lost around two percentage points, while FedEx lost approximately one percentage point. Other operators experienced only marginal changes.

The HHI amounts to 19 per cent, indicating moderate market concentration. Concentration declined by one percentage point during the year. The concentration ratio (CR4) remained unchanged at 77 per cent.

The Instability Index increased to 8, meaning that market shares equivalent to approximately eight percentage points were redistributed during 2025.

The B2B market exhibits the lowest concentration of the three service segments. Concentration has gradually declined over time, and the largest operator's market share has steadily fallen. At the same time, market shares among the largest operators remain relatively stable and overall market instability is low. B2B is therefore the most stable segment and exhibits the most even distribution of market shares among competitors.

4.9 Market concentration: C2X parcels

The C2X market comprises eight active operators, six of which hold market shares exceeding one per cent.

PostNord is by far the largest operator, accounting for 75-80 per cent of market revenue. It is followed by DHL with 10-15 per cent, DSV/Schenker with 5-10 per cent, and Instabee, Bring Parcels and Airmee, each holding market shares of 1-5 per cent.

Table 12: Market shares and concentration – C2X parcels

Company:	Market share (turnover) C2X 2025	
Postnord	75-80%	5
DHL	10-15%	0
DSV/Schenker	5-10%	-5
Instabee	1-5%	1
Bring Parcels	1-5%	2
Airmee	1-5%	-1
2 actors <1%	<1% combined	

HHI	**58%**	↑	**(53%)**
CR4 (four largest)	**96%**	↓	**(97%)**
Instability index	**15**	↔	**(15)**

Company:	Market share (volume) C2X 2025	
Postnord	65-70%	1
DHL	10-15%	1
DSV/Schenker	5-10%	-3
Bring Parcels	1-5%	3
Instabee	1-5%	1
Airmee	1-5%	-1
2 actors <1%	<1 % combined	

HHI	**50%**	↑	**(49%)**
CR4 (four largest)	**95%**	↑	**(96%)**
Instability index	**12**	↓	**(21)**

Note: Change in market shares reported in percentage points. Green=strengthened position, Red=lost market share. Companies <1%: Early Bird, Bussgods. (Ranked by turnover)

Compared with the previous year, PostNord increased its market share by approximately five percentage points, Bring Parcels by two percentage points and Instabee by one percentage point. At the same time, DSV/Schenker lost approximately five percentage points and Airmee lost around one percentage point.

The HHI stands at 58 per cent, indicating a highly concentrated market. Concentration increased by five percentage points during the year. At the same time, CR4 declined by one percentage point to 96 per cent. This reflects a situation in which the largest operator strengthened its position while the four largest operators collectively lost some ground relative to smaller competitors.

The Instability Index remains at 15, indicating a level of market-share redistribution similar to that observed in the previous year.

A volume-based analysis shows that the market is less concentrated in volume terms than in revenue terms. This applies to the market share of the leading operator as well as to HHI and CR4. The results suggest that the market leader is not only handling more parcels but is also capturing an increasingly large share of industry revenues.

C2X is the most concentrated of the three service segments, and concentration has increased over time. At the same time, CR4 has declined over the period, indicating a somewhat more even distribution of market shares between larger and smaller operators.

4.10 Summary conclusions: market concentration at the national level

The Swedish parcel market has become less concentrated over time. Across the total market, both HHI and CR4 have declined since 2018, indicating that market shares have become distributed across a larger number of operators. The decline is more pronounced when concentration is measured by volume than by revenue. This suggests that larger operators have retained a relatively stronger share of market revenue, while smaller operators have gained market shares primarily in terms of parcel volumes. During the same period, the number of active firms increased, although recent years have also seen greater consolidation.

Levels of concentration vary considerably across submarkets. The domestic market is the most concentrated of the three main submarkets, although it has also experienced the most significant decline in concentration since 2018. While the market continues to be dominated by a limited number of major operators, their combined market share has gradually fallen.

The import market exhibits lower concentration than the domestic market. Concentration measured by revenue has remained relatively stable at a moderate level, while volume-based concentration has declined more noticeably. The import market is also the most dynamic submarket, with substantial shifts in market shares occurring in recent years, often as a result of changes in international logistics contracts.

The export market also displays lower concentration than the domestic market. Concentration has remained comparatively stable over time, particularly when measured by revenue. In the export market, UPS is the largest operator by revenue, whereas Postnord is the largest operator in all other submarkets.

Differences in concentration are also evident across customer segments. Both the B2C and B2B segments show patterns similar to those observed in the broader submarkets, with declining concentration and an increasing number of active operators over time.

The C2X segment has developed in the opposite direction. Market concentration increased from 33 per cent in 2018 to 58 per cent in 2025, measured by revenue. This development reflects exceptionally strong growth in the C2X segment, which has expanded by more than 400 per cent since 2018 in both volume and revenue terms. PostNord has captured a substantial share of this growth. Overall, the evidence suggests that while concentration varies across segments, the parcel market as a whole has become less concentrated over time.

PTS statistics indicate a growing parcel market in which the number of operators has increased while market concentration has declined. However, developments differ across submarkets and service segments. The fact that concentration declines more rapidly when measured by volume than by revenue suggests that established operators continue to maintain strong positions in terms of revenue generation, whereas smaller challengers primarily compete through lower prices.

5. Theme 2026: Delivery Channels

5.1 Introduction

As part of this year's data collection, PTS gathered information on B2C parcel volumes (i.e. e-commerce parcels) by delivery channel within the submarket *Parcels Delivered in Sweden*, which comprises both domestic and imported parcels. The purpose is to analyse how parcel volumes are distributed across delivery channels and operators.

Delivery channels represent different methods of parcel delivery within the parcel market and should not be regarded as separate markets. The concentration measures presented in this chapter are used solely to describe the structure of the delivery channels and the distribution of volumes. They should not be used to draw conclusions regarding competition in the parcel market as a whole.

Of the 22 companies covered by the survey, 18 submitted data. Following aggregation to parent-company level (see Section 1.1), 13 companies remain in the analysis.

5.2 Distribution of volumes by delivery channel

Delivery to collection points is the most common delivery method, accounting for 46 per cent of total B2C parcel volumes. Home delivery represents 32 per cent, while parcel locker delivery accounts for 21 per cent.

5.3 Parcel locker distribution

Of the 13 companies included in the analysis, nine offer delivery through parcel lockers. Three of these operators hold volume shares exceeding one per cent of total parcel locker volumes.

Instabee is the largest operator within this delivery channel, handling approximately 65-70 per cent of all parcel locker volumes. Postnord is the second-largest operator with a share of around 25-30 per cent, followed by DHL with 1-5 per cent.

Table 13: Volume share – parcel locker distribution[13]

Company:	Volume share, parcel locker:
Instabee	65–70%
Postnord	25–30%
DHL (total)	1–5%
6 actors <1%	<1% combined

Parcel locker distribution:	
Number of companies:	9
No. companies >1%:	3
No. companies <1%:	6
HHI:	55%
CR4:	100%

An HHI of 55 per cent indicates that parcel locker volumes are concentrated among a small number of operators. CR4 equals 100 per cent, meaning that virtually all parcel locker volumes are handled by the four largest firms. One reason for this concentration may be that participation in this delivery channel requires access to an extensive network of parcel lockers and supporting infrastructure.

5.4 Collection point distribution

Nine operators offer delivery through collection points. Of these, five hold volume shares exceeding one per cent.

PostNord is the largest operator, accounting for 55-60 per cent of total collection-point volumes. DHL follows with approximately 15-20 per cent. Bring Parcels and DSV/Schenker each account for 10-15 per cent, while the distributors participating in the Early Bird collaboration collectively account for 1-5 per cent.

Table 14: Volume share – Collection point distribution[14]

Company:	Volume share, collection point
Postnord	55–60 %
DHL (totalt)	15–20 %
Bring Parcels	10–15 %
DSV/Schenker	10–15 %
Early Bird	1–5 %
4 actors <1%	ca 1–2 % combined

Collection point distribution:	
Number of companies:	9
No. companies >1%:	5
No. companies <1%:	4
HHI:	39%
CR4:	97%

The CR4 value of 97 per cent indicates that most collection-point deliveries are handled by the four largest operators. However, the HHI value of 39 per cent shows that volumes are distributed relatively evenly among those leading firms. Compared with parcel locker delivery, volume distribution is substantially more balanced.

[13] Parcel locker distribution: Companies <1 %: Bussgods, Citymail, Bring, Airmee, Early Bird, DSV/Schenker
[14] Collection point distribution: Companies <1 %: UPS, Citymail, Bussgods, Jetpak

Collection-point delivery also requires a network of service points, typically based on agreements with retail stores and other businesses. However, establishing such a network is likely less capital-intensive than purchasing, deploying and maintaining a nationwide parcel-locker network, which may help explain the more even distribution of volumes.

5.5 Home delivery

All 13 operators included in the analysis offer home delivery services. Seven of these hold volume shares exceeding one per cent.

PostNord is the largest operator with approximately 55-60 per cent of total home-delivery volumes. Early Bird, Airmee and CityMail each hold market shares of 10-15 per cent. Velove, UPS and Bring Parcels each account for between 1 and 5 per cent.

Tabell 15: Volume share – Home delivery[15]

Company:	Volume share, home delivery
Postnord	55–60%
Early Bird	10–15%
Airmee	10–15%
Citymail	10–15%
Velove	1–5%
UPS	1–5%
Bring Parcels	1–5%
6 actors <1%	ca 1–2% combined

Home delivery:	
Number of companies:	13
No. companies >1%:	7
No. companies <1%:	6
HHI:	36%
CR4:	94%

The CR4 value of 94 per cent indicates that the majority of home-delivery volumes are handled by the four largest operators. However, the HHI of 36 per cent is lower than both parcel locker delivery and collection-point delivery. Home delivery therefore exhibits the most even distribution of volumes among the three delivery channels.

Unlike parcel locker and collection-point delivery, home delivery does not require access to a physical network of service points. This may be one reason why a larger number of operators have achieved meaningful volume shares within this channel.

5.6 Summary observations: Delivery channels

The analysis shows that parcel volumes are distributed differently across delivery channels. Parcel locker delivery exhibits the highest degree of concentration, with a limited number of operators handling almost all volumes. Collection-point delivery is also relatively concentrated, although volumes are distributed more evenly among

[15] Home delivery: Companies <1 %: Best, DSV/Schenker, Instabee, DHL, Bussgods, Jetpak

the leading operators. Home delivery displays the most balanced distribution of volumes. These differences are consistent with the fact that the various delivery channels require different types of infrastructure and investment.

The results also demonstrate that operators occupy different competitive positions depending on the delivery channel. Instabee holds a particularly strong position in parcel locker delivery, while PostNord accounts for a larger share of volumes in collection-point and home-delivery services. These differences reflect the fact that operators partly compete through different distribution models, customer offerings and infrastructure investments.

6. The Market at the Regional and Local Level

6.1 Introduction

This chapter examines the parcel market at the regional and local levels, where the conditions for efficient parcel distribution vary considerably. This is particularly true outside major urban areas, where distances may be long, populations and businesses dispersed, and the availability of service providers such as retail stores and petrol stations limited. Additional geographical challenges include road quality, mountainous terrain, lakes, and similar factors.

To support this analysis, PTS collects information from parcel operators regarding delivered volumes by service segment (letterbox parcels, B2C, B2B and C2X parcels) at postcode level. PTS also gathers address information for all fixed service points operated by parcel distributors, including collection points and parcel lockers. Together, these data enable a detailed assessment of service availability and competitive conditions in different parts of Sweden.

As in previous years, PTS finds significant geographical variation at both regional and local levels. These differences arise both between different parts of the country and within individual municipalities. However, it can be noted that there are no local geographical areas entirely lacking competition. PTS's analysis of postcode-level data shows that competition remains present throughout the country, with multiple operators delivering parcels in all regions.

To provide a deeper understanding of competition and service provision in different parts of Sweden, this year's analysis focuses on municipal-level market shares based on:

- The geographical characteristics of municipalities (municipality type).
- The types of parcel distributors active in different parts of the country and across different market segments (B2B, B2C and C2X).

Section 6.2 presents the market-share analysis based on parcel volumes reported for 2025.

Section 6.3 summarizes the key findings regarding competition at regional and local levels.

6.1.1 Different categories of parcel delivery operators

To analyse competition and market shares by municipality and municipality type, operators have been grouped into categories according to their primary delivery model. Although the boundaries between categories are not absolute, several distinct groups can be identified.

1. *Postnord*: Given its position as by far the largest operator in the parcel market, with an overall volume-based market share of approximately 50 per cent, PostNord is treated as a separate category. PostNord also offers an exceptionally broad range of services and operates across all of the categories described below.
2. *Last mile actors*: This category includes operators focusing primarily on home deliveries to consumers, mainly in major urban areas. [16]
3. Distributors of “packets”: Operators that distribute parcels through the letter mail distribution network alongside mail or newspaper deliveries. [17]
4. *Service network operators*: Operators whose parcel distribution relies primarily on nationwide networks of fixed service points, including collection points and parcel lockers. [18]
5. *Other operators*: A category covering operators with mixed service offerings, including courier and express services, primarily targeting business customers. [19]

6.1.2 Service segments in the geographical analysis

For the purposes of the geographical analysis, the service segments used in the national market analysis have been consolidated into two broader categories:

1. *Business market*: B2B parcels.
2. *Consumer market*: Packets[20], B2C and C2X parcels.

[16] Airmee, Best and Velove

[17] Companies that collaborate under the umbrella of Early Bird, and CityMail

[18] Bring, Bussgods, DHL, Instabee, DSV/Schenker

[19] Jetpak, UPS (In 2024, DSV was also included in this category, but following the acquisition of Schenker, it is more accurate—in relation to volumes per service segment—to report the merged company under the 'Service Network' category)

[20] PTS notes that small volumes of B2B consignments may be included within letterbox-parcel volumes because these flows cannot currently be separated. However, the volumes are considered too small to affect the analysis or conclusions.

6.2 Market shares at the municipal level

The following analysis presents volume-based market shares by municipality type[21] and distributor category. The purpose is to illustrate the intensity of competition across different geographical areas. Volumes include both domestic parcels and imported parcels delivered to recipients in Sweden during 2025.

Total market

The table below shows market shares by distributor category and municipality type, regardless of whether the packages were delivered to businesses or to private individuals.

Table 16: Market share by distributor category and municipality type – Total market

Distributor category	1. Metropolitan municipalities	2. Dense municipalities near major cities	3. Dense municipalities remotely located	4. Rural municipalities close to larger cities	5. Remote rural municipalities	6. Very remotely located rural municipalities
Postnord	46%	52%	54%	52%	55%	57%
Last mile	6%	3%	1%	2%	0,5%	0%
Distributors of packets	10%	8%	6%	8%	6%	4%
Service network operators	34%	34%	35%	35%	35%	37%
Other	4%	3%	3%	3%	3%	2%

Last mile: *Airmee, Best, Velove.* ***Packets***: *Early Bird, Citymail.* ***Service network***: *Bring, Bussgods, DHL, Instabee, DSV/Schenker.* ***Other:*** *Jetpak, UPS.*

The overall market picture shows that PostNord tends to hold larger market shares in more remote and sparsely populated parts of the country. Service-network operators maintain relatively stable market shares regardless of geography, while the remaining categories generally experience declining market shares as population density decreases and remoteness increases.

Business market

This table shows the geographical market shares by distributor category for parcels delivered to businesses during 2025.

[21] See Appendix 1 with regards to division into municipality types

Table 17: Market share per distributor category and municipality type – Business Market

Distributor category	1. Metropolitan municipalities	2. Dense municipalities near major cities	3. Dense municipalities remotely located	4. Rural municipalities close to larger cities	5. Remote rural municipalities	6. Very remotely located rural municipalities
Postnord	46%	50%	50%	45%	47%	47%
Last mile	0%	0%	0%	0%	0,0%	0%
Distributors of packets	0%	0%	0%	0%	0%	0%
Service network operators	32%	36%	37%	40%	39%	45%
Other	21%	14%	12%	14%	14%	8%

Last mile: *Airmee, Best, Velove.* ***Packets***: *Early Bird, Citymail.* ***Service Network***: *Bring, Bussgods, DHL, Instabee, DSV/Schenker.* ***Other:*** *Jetpak, UPS.*

Competition in the business market appears much more geographically balanced. Postnord's market share remains relatively similar across municipality types. In contrast, service-network operators tend to hold stronger positions outside metropolitan areas, whereas operators in the "Other" category tend to be strongest in metropolitan regions and weaker elsewhere, particularly in the most remote areas.

Letterbox parcel operators report virtually no volumes within the business market, while last-mile operators are not active in this segment.

Overall, the business market displays a relatively stable competitive structure across the country. Nevertheless, the availability of certain specialised services is likely to decline as geographical challenges such as distance and population density increase.

Consumer market

Finally, the geographical market shares per distributor category for packages delivered to private individuals during 2025 are presented here.

Table 18: Market share by distributor category – Consumer market

Distributor category	1. Metropolitan municipalities	2. Dense municipalities near major cities	3. Dense municipalities remotely located	4. Rural municipalities close to larger cities	5. Remote rural municipalities	6. Very remotely located rural municipalities
Postnord	46%	52%	55%	54%	56%	60%
Last mile	8%	3%	2%	2%	0,7%	0%
Distributors of packets	12%	10%	8%	9%	8%	5%
Service network	34%	34%	35%	34%	34%	35%
Other	0,6%	0,6%	0,7%	0,8%	0,8%	0,5%

Last mile: *Airmee, Best, Velove.* ***Packets***: *Early Bird, Citymail.* ***Service network***: *Bring, Bussgods, DHL, Instabee, DSV/Schenker.* ***Other:*** *Jetpak, UPS.*

The consumer market presents a somewhat different picture. PostNord holds a particularly strong position outside metropolitan areas, whereas service-network operators maintain a stable market share of roughly 34-35 per cent across all municipality types.

Last-mile operators are concentrated primarily in metropolitan and larger urban areas, although some volumes are also delivered in more remote municipalities. However, they are absent from the most remote municipality category. Other operators account for only small volumes in the consumer market, with relatively stable shares across geographies.

Overall, competition remains broad across most of the country. However, parcel distribution to the most remote areas is primarily carried out by PostNord and service-network operators. As in the business market, there is therefore a degree of geographical vulnerability on the consumer side because fewer operators and delivery options are available in some parts of the country.

Market developments at the geographical level

PTS has access to reliable postcode-level volume data only from 2023 onwards, making it difficult to draw longer-term conclusions about regional or local developments in competition. Nevertheless, some recent trends are visible.

The following table shows how Postnord's market shares within the total, corporate, and consumer markets have developed over the past three years.

Table 19: Postnords' market share by municipality type (including development 2023–25)

Postnrod 2025 (2024,2023)	**1. Metropolitan municipalities**	**2. Dense municipalitie s near major cities**	**3. Dense municipalities remotely located**	**4. Rural municipalities close to larger cities**	**5. Remote rural municipalities**	**6. Very remotely located rural municipalities**
Total	**46%** (47%, 48%)	**52%** (48%, 52%)	**54%** (49%, 53%)	**52%** (48%, 51%)	**55%** (51%, 54%)	**57%** (54%, 58%)
Business market	**46%** (46%, 46%)	**50%** (50%, 51%)	**50%** (52%, 54%)	**47%** (48%, 49%)	**47%** (51%, 54%)	**47%** (48%, 57%)
Consumer market	**46%** (47%, 48%)	**52%** (48%, 52%)	**55%** (48%, 53%)	**54%** (49%, 52%)	**56%** (50%, 54%)	**60%** (55%, 62%)

On the business market, competition appears to be increasing in all municipality types outside metropolitan areas, as reflected in declining PostNord market shares over time.

The picture on the consumer market is more fragmented and volatile. The primary explanation is the large shifts in import flows and the fact that major e-commerce retailers periodically switch logistics providers. Such changes have a clear effect on local market shares, particularly in municipality types 2-6. At the same time, declining newspaper-delivery volumes among operators participating in the Early Bird collaboration contribute to somewhat higher concentration, especially in municipality types 3-6.

6.3 Summary conclusions: The market at the regional and local level

Within the business market there is evidence of increasing competition across all municipality types. In contrast, developments in the consumer market appear considerably more fragmented and volatile.

PTS finds that competition exists throughout Sweden. In no postcode area were fewer than four parcel distributors reported to have delivered parcels during 2025. Access to different delivery models, including home delivery, collection-point delivery, parcel lockers and letterbox delivery, also extends across most of the country. However, the number of operators becomes more limited in the most remote and sparsely populated areas.

The fact that market-based competition provides a basic parcel service nationwide does not necessarily imply that all user needs are met equally across the country. Outside larger urban centres, where distances are greater and populations and businesses more dispersed, the number of operators declines and consumer choice becomes more limited. The range of services offered by individual operators and the geographical location of service points can therefore have a substantial impact on the actual service level available locally.

The geographic dispersion of service points across multiple operators may also result in parcels destined for a single recipient being distributed across a wider area. Furthermore, changes in logistics providers among major or highly specialised e-commerce retailers can have significant consequences for residents and businesses in areas where distances between service points are already substantial. Combined with volatile import flows that shift between operators, this creates an increasingly complex competitive landscape.

Finally, it should be noted that, as identified in previous reports, competition and the continued rollout of parcel lockers have generally had a positive impact on access to parcel services and average distances to service points across all municipality types.

APPENDICES

Appendix 1: Municipality types

Municipality Type	Description
1. Metropolitan Municipalities	More than 80 per cent of the population live in urban areas and, together with neighbouring municipalities, form a population centre of at least 500,000 inhabitants.
2. Dense Municipalities Close to Major Cities	More than 50 per cent of the population live in urban areas. The majority of the municipality's population have less than a 45-minute drive to an urban area with at least 50,000 inhabitants.
3. Dense Remote Municipalities	More than 50 per cent of the population live in urban areas. The majority of the municipality's population have more than a 45-minute drive to an urban area with at least 50,000 inhabitants.
4. Rural Municipalities Close to Major Cities	More than 50 per cent of the population live in rural areas. The majority of the municipality's population have less than a 45-minute drive to an urban area with at least 50,000 inhabitants.
5. Remote Rural Municipalities	More than 50 per cent of the population live in rural areas. The majority of the municipality's population have more than a 45-minute drive to an urban area with at least 50,000 inhabitants.
6. Very Remote Rural Municipalities	The entire population lives in rural areas. The entire population has more than a 90-minute drive to an urban area with at least 50,000 inhabitants.

Figure 4: Map over different municipality types