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The Swedish Parcel Market 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 the parcel market has seen growth in both the domestic market as well as the import and export markets. During the year, the import from countries outside of Europe has continued to grow strongly and we have also seen continued strong growth in parcels sent from consumer-to-consumer. This development reflects both the economic recovery and a continued interest in second-hand and low-cost imports among Swedish consumers.

PTS analyses show that competition reaches all parts of the country and that the presence of competing delivery networks in combination with the establishment of parcel lockers has improved the accessibility of parcel services.

Dan Sjöblom
Chief Executive

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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 Regulation[1] and include statistics on volumes and turnover.

The statistics in this report were collected by the Authority in May 2025 and refer to the calendar year of 2024. This year's data collection covers a total of 24 individually registered companies. [2] Compared to last year (25 companies), this year one company has been added, the last mile actor Velove, while Tidningstjänst AB has been merged with Bonway AB.

Statistics for companies within the same group have been aggregated up to the main company. This means that the seven distributors[3] that cooperate within the framework of Early Bird have been aggregated to “Early Bird”. Along the same lines, DHL Freight and DHL Express have been aggregated to “DHL”. Following this, 17 companies remain and are analysed in the report.

1.2 Definitions and description of submarkets and segments

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 (“domestic”)**: Parcels that are distributed within Sweden (Sweden-to-Sweden).

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

[3] The following seven companies cooperate within the framework of Early Bird: Bonway AB (formerly Hall Media Logistik, Nim Distribution, Prolog KB, Tidningstjänst AB), NWT, Point Logistik, Pressens Morgontjänst, Svensk Hemleverans HB, Svensk Hemleverans Norr, Västsvensk tidningsdistribution

- **Incoming cross-border parcel delivery services (”import”)**: Parcels that are imported into Sweden.
- **Outgoing cross-border parcel delivery service (”export”)**: Parcels that are exported from Sweden.

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

- **Total market**: the sum of domestic, incoming (import), and outgoing (export) parcel delivery services.
- **Parcels distributed in Sweden**: the sum of domestic and incoming parcel delivery services.
- **Domestic market** – domestic as per the definition above.
- **Import market** – incoming as per the definition above.
- **Export market** – 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 the consumer of goods that have been purchased online.
- **B2B market**: business-to-business parcels. This data collection covers single-piece consignments of business parcels weighing up to 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.

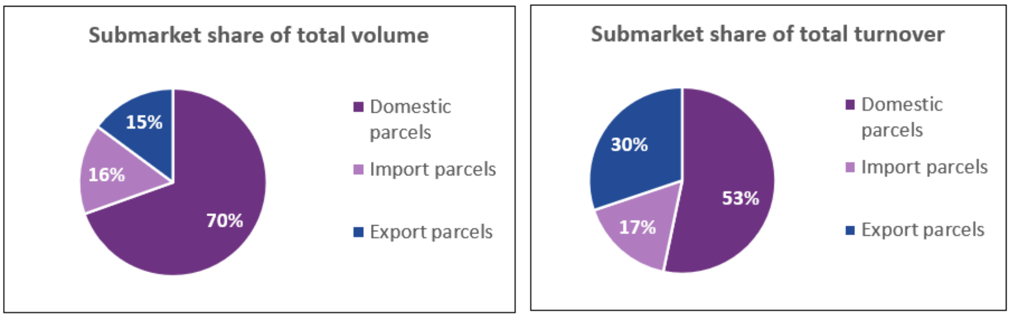
With respect to the business segments, it should be noted that the companies cannot always distinguish between parcels in the way outlined in the definitions above. For example, returns may in some cases be registered as B2C. Similarly, some B2C flows may in some cases include a small amount of C2C (e.g. some distributors cannot always distinguish C2C when they distribute parcels on behalf of another provider).

2. The parcel market submarkets and market growth in 2024

2.1 Parcel market submarkets

In terms of number of parcels, the largest submarket of the Swedish parcel market is domestic parcels (70% of the total number of parcels delivered), followed by import parcels (16%) and export parcels (15%). Looking instead at turnover, the import and export markets make up a slightly larger share of the market.

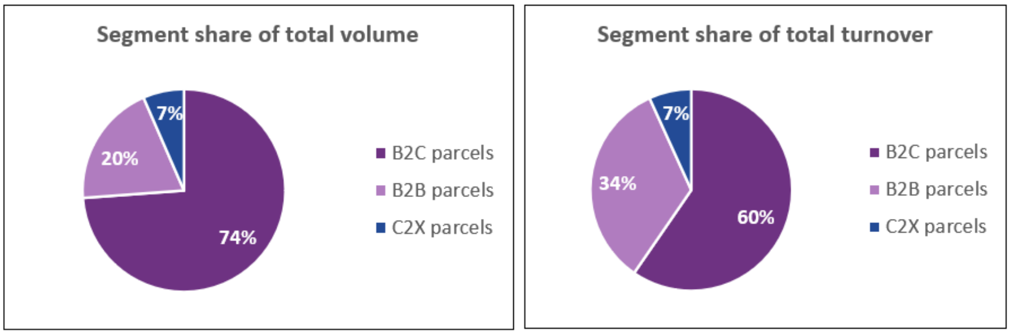
Figure 1: Domestic, import and export parcel deliveries as a share of total volume and turnover



2.2 Business segments (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 (20%) and C2X parcels (7%). Looking instead at turnover, the B2B segment represents a slightly larger share of the market, reflecting the generally higher prices of business parcels.

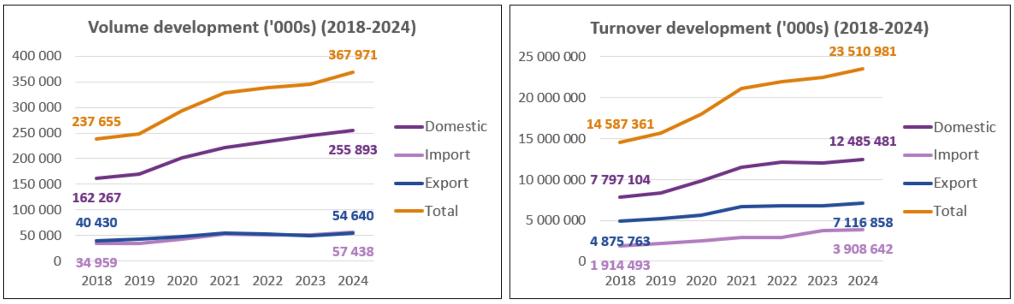
Figure 2: B2C, B2B and C2X as a share of the total volume and turnover (distributed in Sweden)



2.3 Evolution of volumes and turnover over time (2018–2024)

During the period 2018–2024, the parcel market grew in terms of both volume and turnover. In terms of volume, the domestic market grew by 58%, the import market by 64% and the export market by 35%. In terms of turnover, growth was 60% in the domestic market, 104% in the import market and 46% in the export market.

Figure 3: Evolution of volume and turnover over time (2018–2024)



2.4 Evolution of the parcel market in 2024

In 2024, 368 million parcels were distributed in the total market, of which 313 million were parcels distributed in Sweden (i.e. domestic and import parcels combined). There were 256 million domestic parcels distributed, 57 million import parcels, and 55 million export parcels.

Total turnover in the market amounted to approximately SEK 24 billion in 2024, of which approximately SEK 16 billion related to parcels distributed in Sweden. Turnover amounted to approximately SEK 12 billion for domestic parcel deliveries, approximately SEK 4 billion for imports, and approximately SEK 7 billion for exports.

Table 1: Outcome and growth of the parcel market in 2024

	Outcome 2024		Growth 2023-2024	
Submarket:	**Turnover (bn SEK)**	**Volume (million)**	**Turnover**	**Volume**
Domestic parcels	12	256	4%	4%
Import parcels	4	57	5%	13%
Export parcels	7	55	5%	10%
Total	**24**	**368**	**5%**	**7%**
Distributed in Sweden	**16**	**313**	**4%**	**6%**

(*) Distributed in Sweden = Sum total of domestic and import

In 2024, the total market grew by about 7% in terms of volume and 5% in terms of turnover. Looking only at parcels distributed in Sweden, growth was 6% and 4%, respectively.

Growth in the domestic parcel market reflects continued strong growth in e-commerce (B2C volumes increased by approximately 6% during the year) and continued strong growth in the smaller C2X segment (the number of parcels sent by consumers increased by 46% in 2024). Growth in C2X shows that the second-hand trend is continuing in the Swedish market.

During the year, we have also seen good growth in the import and export markets. The growth in import volumes is primarily driven by parcels from countries outside Europe (+65%), reflecting Swedish consumers' continued interest in e-commerce via international low-price giants such as Temu and Shein. In contrast, the growth in export volumes (+13%) is mainly attributable to parcels distributed to countries within Europe.

In summary, all submarkets experienced solid growth in 2024. This development reflects a modest recovery in the Swedish economy and a continued strong trend towards low prices and second-hand goods.

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 segments[4], in which both simpler standard products and premium products[5] 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]

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[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

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

3.1.3 Herfindahl-Hirschman Index

Herfindahl-Hirschmann Index (HHI) is a measure of market concentration, which is calculated as the sum of the squared market shares in the market. An increase in the index is usually interpreted as an increase in market concentration, i.e. a decrease in competition, but needs to be interpreted in its context, as such an increase may also reflect a reallocation of market shares towards more efficient businesses.[7]

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.[8]

Table 3: Interpretation of the Herfindahl-Hirschman Index

Index value	Interpretation of 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

[7] HMG (2020), State of competition: Existing competition indicators

[8] 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 HHI. Unlike the DoJ and FTC, however, the Commission has not, to our knowledge, established a clear and unambiguous definition of markets in terms of HHI, which is why we use the definition in DoJ & FTC (2010). Our main purpose with the measure is also primarily to find an indicator that allows us to monitor developments over time. For that purpose, the American definition currently appears to be the best available.

higher the value of the index, the higher the reallocation, which may be an indication of a higher intensity of competition.[9]

3.2 Market concentration: total market

There are 17 operators active at the total market level (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, 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 Bird[10] and Airmee).

Table 4: Market shares and concentration – total market

Company:	Market share (turnover) Total market 2024	
Postnord	35-40%	-2
UPS	10-15%	0
DHL	10-15%	0
Bring Parcels	5-10%	2
Schenker	5-10%	0
Instabee	5-10%	0
FedEx Express	5-10%	0
Early Bird	1-5%	1
Airmee	1-5%	0
8 companies <1%	ca 3 % combined	

HHI	**20%**	↓	**(22%)**
CR4 (four largest)	**74%**	↓	**(75%)**
Instability index	**6**	↑	**(5)**

Company:	Market share (volume) Totala marknaden 2024	
Postnord	45-50%	-3
Instabee	10-15%	1
DHL	5-10%	0
Bring Parcels	5-10%	0
Schenker	5-10%	1
Early Bird	5-10%	1
UPS	1-5%	0
Airmee	1-5%	0
CityMail	1-5%	0
FedEx Express	1-5%	0
7 companies <1%	ca 2 % combined	

HHI	**26%**	↓	**(28%)**
CR4 (four largest)	**76%**	↓	**(77%)**
Instability index	**6**	↑	**(4)**

Compared to the previous year, two companies strengthened their position in terms of turnover (Bring Parcel by two percentage points and Early Bird by one percentage point), while PostNord lost ground by 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 Herfindahl-Hirschman Index (HHI) shows a value of 20% (turnover), which indicates a moderate market concentration. The market concentration decreased by two percentage points during the year. The concentration ratio (CR4) is 74%, indicating an oligopoly market, in this case with one dominant company. The

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

[10] Market shares for "Early Bird" also include the distributors' own volumes

concentration ratio has also decreased during the year, by one percentage point, reflecting a slight shift in market power from the larger companies to the smaller companies in the market. The instability index shows a value of 6, i.e. six percentage points of market share were reallocated during the year, which is a slightly higher reallocation than in the previous year.

If we instead base the calculation of market shares and concentration indicators on volume, we get a similar picture. However, it can be noted that certain 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 reflects differences in prices and/or product mix (e.g. standard versus premium, proportion of parcels versus parcel letters).

Based on volume, we also see a higher degree of market concentration, which has, however, decreased at a faster rate over time – this applies to both PostNord's market share and HHI and CR4; see Table 5 below.

The 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, although we have also seen a higher degree of consolidation among companies in the market in recent years. A new operator entered the market in 2024, Velove.

Table 5: Development of the competition indicators over time (2018–2024)

	Total market (turnover)							
Measure:	**2018**	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**	**2018-24**
HHI	25%	24%	23%	22%	21%	22%	20%	**-4**
CR4	81%	81%	78%	75%	74%	75%	74%	**-7**
Postnord	40-45%	-1	-1	-1	-1	1	-2	**-5**
Instability index	-	4	5	7	7	5	6	**-**
Number of businesses	13	13	16	16	15	16	17	**4**

	Total market (volume)							
Measure:	**2018**	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**	**2018-24**
HHI	39%	37%	33%	30%	29%	28%	26%	**-13**
CR4	90%	89%	83%	77%	78%	77%	76%	**-14**
Postnord	55-60%	-2	-4	-2	-2	0	-3	**-13**
Instability index	-	5	8	13	11	4	6	**-**
Number of businesses	13	13	16	16	15	16	17	**4**

Note: HHI=Herfindahl-Hirschman index; CR4=combined market share of the 4 largest

3.3 Market concentration: parcels distributed in Sweden

There are 16 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 the largest, with 45–50% of the market in terms of turnover, followed by DHL (10–15%), then three companies with 5–10% (Schenker, Instabee, Bring Parcels), and then four companies with 1–5% (FedEx, UPS, Early Bird, Airmee).

Table 6: Market shares and concentration – distributed in Sweden

Company:	Market share (turnover) Distributed in Sweden 2024	
Postnord	45-50%	-2
DHL	10-15%	0
Schenker	5-10%	0
Instabee	5-10%	0
Bring Parcels	5-10%	1
FedEx Express	1-5%	0
UPS	1-5%	0
Early Bird	1-5%	1
Airmee	1-5%	0
7 companies <1%	ca 3 % combined	

HHI	**25%**	↓	**(26%)**
CR4 (four largest)	**75%**	↓	**(77%)**
Instability index	**6**		**(6)**

Company:	Market share (volume) Utdelat i Sverige 2024	
Postnord	45-50%	-3
Instabee	10-15%	1
DHL	5-10%	0
Schenker	5-10%	1
Early Bird	5-10%	1
Bring Parcels	5-10%	0
UPS	1-5%	0
Airmee	1-5%	0
CityMail	1-5%	0
7 companies <1%	ca 2 % combined	

HHI	**28%**	↓	**(30%)**
CR4 (four largest)	**78%**	↓	**(79%)**
Instability index	**6**	↑	**(5)**

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

Compared to the previous year, Bring Parcels and Early Bird in particular have strengthened their position by one percentage point each, while PostNord lost two percentage points in turnover. The position of other operators remains relatively unchanged, with either a small increase (green) or a small decrease (red) of less than one percentage point.

Calculating the HHI yields a value of 25% (turnover), which represents moderate market concentration and is a decrease of one percentage point over the year. The concentration ratio decreased by two percentage points to 75%, which is attributable to larger companies losing ground to smaller companies in the market. The instability index remains unchanged at six percentage points of market share reallocation during the year.

Looking instead at market shares and concentration indicators based on volume, we find a picture similar to that of the total market. However, PostNord's market share is slightly higher, and the market is somewhat more concentrated in terms of volume, but the concentration tends to decrease at a faster rate over time.

3.4 Market concentration: domestic parcels

There are 16 operators active 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 45–50% of the market in terms of turnover, followed by three companies with 10–15% (DHL, Schenker, Instabee), then Bring Parcels (5–10%), and then three companies with 1–5% (Early Bird, Airmee, Best Transport).

Table 7: Market shares and concentration – domestic parcels

Company:	Market share (turnover) Domestic 2024	
Postnord	45-50%	-2
DHL	10-15%	0
Schenker	10-15%	-1
Instabee	10-15%	0
Bring Parcels	5-10%	2
Early Bird	1-5%	1
Airmee	1-5%	0
Best Transport	1-5%	0
8 companies <1%	ca 4 % combined	

HHI	**28%**	↓	**(30%)**
CR4 (four largest)	**82%**	↓	**(85%)**
Instability index	**7**	↑	**(6)**

Company:	Market share (volume) Inrikes 2024	
Postnord	50-55%	-2
Instabee	10-15%	1
DHL	10-15%	0
Early Bird	5-10%	1
Schenker	5-10%	0
Bring Parcels	5-10%	0
Airmee	1-5%	0
CityMail	1-5%	0
8 companies <1%	ca 2 % combined	

HHI	**29%**	↓	**(31%)**
CR4 (four largest)	**82%**	↓	**(83%)**
Instability index	**6**		**(6)**

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

Compared to the previous year, two companies in particular strengthened their position in terms of turnover (Bring Parcel by two percentage points and Early Bird by 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 has a value of 28% (turnover), which indicates a high market concentration. The market concentration decreased by two percentage points during the year. The concentration ratio is 82%, which also represents a decrease of three percentage points. The instability index shows that seven percentage points (market shares) were reallocated during the year, which is a slightly higher degree of reallocation than in the previous year.

Looking instead at market shares and concentration indicators based on volume, we find a similar picture. Even in this submarket, PostNord and Early Bird have a larger share of the market in terms of volume, which reflects the companies' price and product mix (e.g. a relatively large proportion of parcels distributed as parcel letters).

3.5 Market concentration: imports

There are 11 operators active in the import market. Of these, 9 operators have a market share exceeding 1%.

PostNord is the largest operator, with 35–40% of the market in terms of turnover, followed by two operators with 15–20% (FedEx and UPS), then three operators with 5–10% (Bring Parcels, Schenker, DHL), and then three companies with 1–5% (Airmee, Instabee, Citymail).

Table 8: Market shares and concentration – imports

Company:	Market share (turnover) Import 2024	
Postnord	30-35%	-5
FedEx Express	15-20%	-1
UPS	15-20%	0
Bring Parcels	5-10%	0
Schenker	5-10%	3
DHL	5-10%	1
Airmee	1-5%	1
Instabee	1-5%	1
CityMail	1-5%	0
2 companies <1%	<1 % combined	

HHI	**19%** ↓	**(22%)**
CR4 (four largest)	**76%** ↓	**(83%)**
Instability index	**13** ↓	**(29)**

Company:	Market share (volume) Import 2024	
Postnord	40-45%	-5
Schenker	10-15%	7
UPS	10-15%	-2
Bring Parcels	5-10%	-2
Airmee	1-5%	1
Instabee	1-5%	3
FedEx Express	1-5%	0
CityMail	1-5%	-1
DHL	1-5%	0
2 companies <1%	<1 % combined	

HHI	**24%** ↓	**(29%)**
CR4 (four largest)	**79%** ↓	**(82%)**
Instability index	**21** ↑	**(19)**

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

Compared with the previous year, two companies in particular lost market shares in terms of turnover (PostNord by five percentage points and FedEx by one percentage point), while four companies in particular strengthened their position (Schenker by three percentage points, and DHL, Airmee and Instabee by one percentage point each). Looking at volume, we see a similar picture, although UPS, Bring Parcels and Citymail have lost volume to a greater extent, while Schenker has increased its market share, the latter due to increased imports from China. The position of other operators remains relatively unchanged, with either a small increase (green) or decrease (red) of less than one percentage point.

Calculating the HHI yields a value of 19% (turnover), which represents a moderate market concentration and is a decrease of three percentage points over the year. The concentration ratio (CR4) decreased by seven percentage points, from 83% to 76%, reflecting the fact that, overall, smaller companies in the market strengthened their position somewhat during the year. The reallocation of market shares (instability index) primarily reflects fluctuations in import volumes from countries outside of Europe (e.g. China). During the year, the reallocation was greater in terms of volume (21 percentage points) than in terms of turnover (13 percentage points).

3.6 Market concentration: exports

There are 11 operators active in the export market. 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%). Next come two companies with 15–20% (DHL, Bring Parcels), followed by FedEx Express (5–10%), and then two companies with 1–5% (Schenker, Instabee).

Table 9: Market shares and concentration – exports

Company:	Market share (turnover) Export 2024	
UPS	30-35%	-1
Postnord	20-25%	-2
DHL	15-20%	1
Bring Parcels	15-20%	2
FedEx Express	5-10%	0
Schenker	1-5%	0
Instabee	1-5%	0
4 companies <1%	ca 1 % combined	

HHI	**22%**	**(22%)**
CR4 (four largest)	**86%** ↓	**(87%)**
Instability index	**7** ↑	**(4)**

Company:	Market share (volume) Export 2024	
Postnord	35-40%	-2
Bring Parcels	20-25%	3
UPS	10-15%	-2
DHL	5-10%	-1
Instabee	5-10%	1
FedEx Express	1-5%	0
Schenker	1-5%	0
3 companies <1%	<1 % combined	

HHI	**24%**	**(24%)**
CR4 (four largest)	**86%** ↓	**(88%)**
Instability index	**9** ↑	**(3)**

Change in market share in percentage points. Green=position strengthened, Red=operator has lost market share. Företag <1%: Asendia, Jetpak, DSV, Bussgods.

Compared to the previous year, Bring Parcels in particular strengthened its position (by two percentage points) in terms of turnover, while two companies in particular lost ground (UPS by one percentage point and PostNord by two percentage points). DHL also strengthened its position in terms of turnover but lost some ground in terms of volume during the year. The position of other operators remains relatively unchanged, with either a small increase (green) or decrease (red) of less than one percentage point.

The Herfindahl-Hirschman Index (HHI) remained unchanged at 22% during the year, which represents moderate market concentration. The concentration ratio decreased by one percentage point to 86%, reflecting the fact that, overall, smaller companies strengthened their position slightly. The instability index shows that seven percentage points (market shares) were reallocated during the year, which is a higher degree of reallocation compared with the previous year.

In terms of volume, we see a similar picture in terms of the allocation of market shares, with the same four companies at the top of the list, although PostNord is now the largest.

3.7 Market concentration: B2C parcels

There are 16 operators active in the B2C market (see section 1.2 for definitions). Of these, 10 operators have a market share exceeding 1%.

PostNord is the largest operator, with 45–50% of the market in terms of turnover, followed by Instabee (10–15%), then four operators with 5–10% (DHL, Bring Parcels, Schenker, Early Bird), and then another four operators with 1–5% (Airmee, Best Transport, Citymail, UPS).

Table 10: Market shares and concentration – B2C parcels

Company:	Market share (turnover) B2C 2024	
Postnord	45-50%	-5
Instabee	10-15%	1
DHL	5-10%	0
Bring Parcels	5-10%	1
Schenker	5-10%	1
Early Bird	5-10%	1
Airmee	1-5%	0
Best Transport	1-5%	0
CityMail	1-5%	0
UPS	1-5%	0
6 companies <1%	<1 % combined	

HHI	**28%**	↓	**(32%)**
CR4 (four largest)	**79%**	↓	**(82%)**
Instability index	**9**	↑	**(5)**

Company:	Market share (volume) B2C 2024	
Postnord	45-50%	-5
Instabee	15-20%	1
Early Bird	5-10%	1
Schenker	5-10%	2
DHL	5-10%	0
Bring Parcels	5-10%	0
Airmee	1-5%	0
CityMail	1-5%	0
3 companies <1%	<1 % combined	

HHI	**27%**	↓	**(31%)**
CR4 (four largest)	**79%**	↓	**(81%)**
Instability index	**9**	↑	**(7)**

Change in market share in percentage points. Green=position strengthened, Red=operator has lost market share.
Företag <1%: Velove, FedEx, Bussgods, DSV, Ica paket, Jetpak.

Compared to the previous year, four companies in particular strengthened their position (Instabee, Bring Parcels, Schenker and Early Bird, with one percentage point each), while PostNord in particular lost ground (five 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 28% (turnover), which represents a high market concentration and is a decrease of four percentage points since the previous year. The concentration ratio decreased by three percentage points to 79%, indicating that smaller companies strengthened their position during the year. The instability index shows a value of 9, i.e. approximately nine percentage points (market shares) were reallocated. This is an increase compared to the previous year.

Looking at market shares and concentration indicators based on turnover produces a similar picture, but Instabee in particular has a higher share of the market in terms of volume.

3.8 Market concentration: B2B parcels

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

PostNord is the 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%), and then two operators with 1–5% (Jetpak, DSV).

Table 11: Market shares and concentration – B2B parcels

Company:	Market share (turnover) B2B 2024	
Postnord	30-35%	-1
DHL	15-20%	0
FedEx Express	10-15%	0
Schenker	10-15%	-1
UPS	10-15%	0
Bring Parcels	5-10%	3
Jetpak	1-5%	-1
DSV Road	1-5%	0
2 companies <1%	<1 % combined	

HHI	**20%** ↓	**(21%)**
CR4 (four largest)	**77%** ↓	**(79%)**
Instability index	**7**	**(7)**

Company:	Market share (volume) B2B 2024	
Postnord	45-50%	0
DHL	10-15%	0
Schenker	10-15%	0
UPS	10-15%	0
Bring Parcels	5-10%	0
FedEx Express	1-5%	0
4 companies <1%	ca 2 % combined	

HHI	**30%**	**(30%)**
CR4 (four largest)	**86%**	**(86%)**
Instability index	**2** ↓	**(5)**

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

Compared to the previous year, Bring Parcels in particular strengthened its position (by three percentage points) in terms of turnover, while PostNord, Schenker and Jetpak in particular lost ground (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 has a value of 20% (turnover), which represents a moderate market concentration and a decrease of one percentage point over the year. The concentration ratio decreased by two percentage points to 77%. The instability index remained unchanged at 7, i.e. approximately seven percentage points (market shares) were reallocated during the year.

If we instead look at volume, both PostNord's market share and the various concentration indicators are considerably higher, but there is also a much more stable reallocation in terms of volume.

3.9 Market concentration: C2X parcels

There are 7 operators active in the C2X market (see section 1.2 for definitions). Of these, 6 operators have a market share exceeding 1%.

PostNord is the largest operator, with 70–75% of the market in terms of turnover, followed by two operators with 10–15% (Schenker, DHL), and then three operators with 1–5% (Airmee, Early Bird, Instabee).

Table 12: Market shares and concentration – C2X parcels[11]

Company:	Market share (turnover) C2X 2024	
Postnord	70-75%	6
Schenker	10-15%	-5
DHL	10-15%	-1
Airmee	1-5%	-1
Early Bird	1-5%	1
Instabee	1-5%	1
1 company <1%	<1%	

HHI	**53%**	↑	**(47%)**
CR4 (four largest)	**97%**	↓	**(98%)**
Instability index	**15**	↑	**(6)**

Company:	Market share (volume) C2X 2024	
Postnord	65-70%	8
DHL	10-15%	-3
Schenker	10-15%	-6
Early Bird	1-5%	2
Instabee	1-5%	1
Airmee	1-5%	-2
1 company <1%	<1 %	

HHI	**50%**	↑	**(42%)**
CR4 (four largest)	**97%**	↓	**(99%)**
Instability index	**23**	↑	**(9)**

Change in market share in percentage points. Green=position strengthened, Red=operator has lost market share. Företag <1%: Bussgods.

Compared with the previous year, three operators in particular strengthened their position in terms of turnover (PostNord by 6 percentage points, and Early Bird and Instabee by one percentage point each), while three operators in particular lost ground (Schenker by five percentage points, and DHL and Airmee by one percentage point each).

[11] The market shares differ when compared to the previous year, as some C2C services were not included in previous reports. These have been estimated and added for the available years (2023 and 2024).

The HHI has a value of 53% (turnover), which indicates a high market concentration. This represents an increase in concentration by six percentage points over the year. The concentration ratio decreased by one percentage point to 97%. The above is a reflection of the fact that, while the largest company strengthened its position, the four largest companies combined lost some ground to the smaller companies in the market. The instability index shows a significantly more intense reallocation of market shares compared with the previous year.

If we instead look at market shares and concentration indicators based on volume, we get a similar picture. But PostNord and Early Bird in particular strengthened their position to a slightly greater extent, while Schenker, DHL and Airmee in particular lost ground to a slightly greater extent.

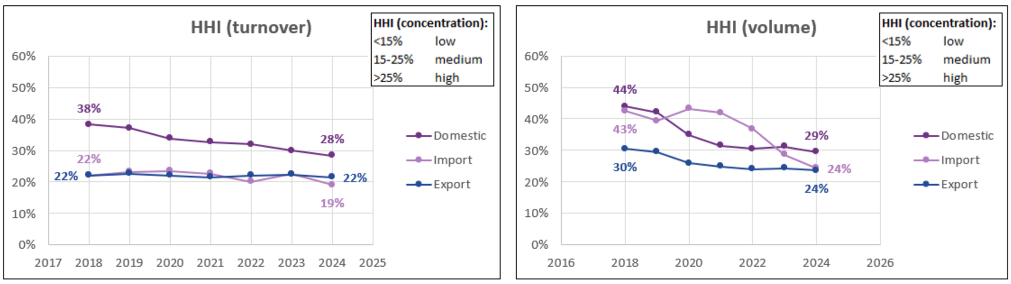
3.10 Summary conclusions: market concentration at the national level

In this chapter, PTS examined the degree of market concentration and competition in the Swedish parcel market. We looked at three concentrator indicators: market concentration (HHI), the combined market share of the four largest companies (i.e. the concentration ratio, CR4), and the market share of the largest company (PostNord). We also examined two indicators of market stability. The development of these over time may be an indication of the intensity of the competition: the number of active companies and the proportion of market shares reallocated each year (instability index).

The analysis shows that there is a high degree of market concentration in the domestic market. However, this has fallen relatively sharply during the period 2018–2024, in terms of both volume and turnover.

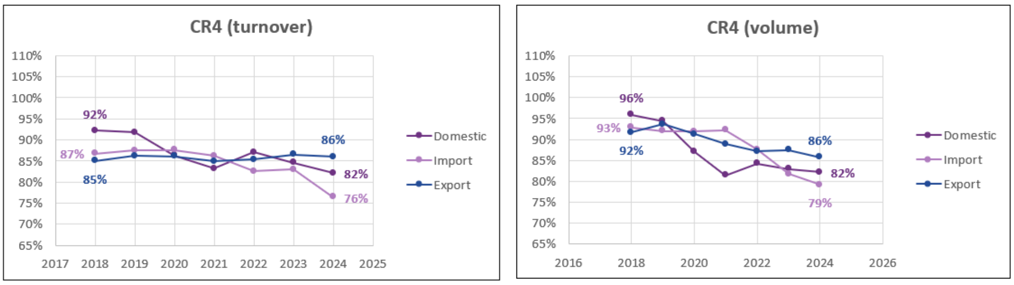
The concentration is lower in the import and export markets. In terms of turnover, the concentration has remained relatively stable at a moderate level since 2018 (approximately 20%), while in terms of volume it has been higher but has fallen to a greater extent.

Figure 4: Market concentration (HHI) over time (2018–2024)



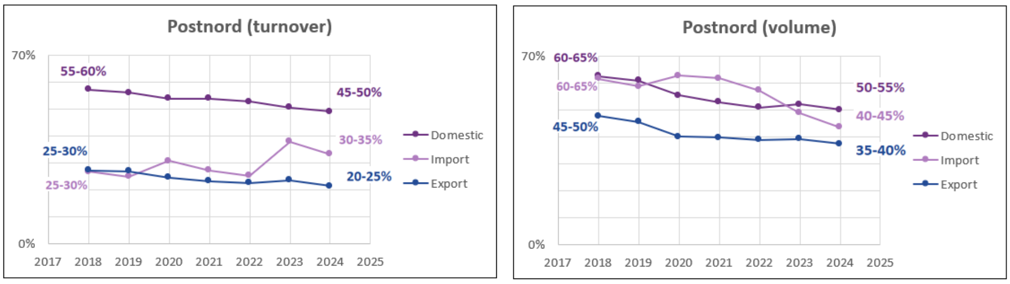
The concentration ratio (CR4) shows that the combined market share of the four largest companies in the market decreased during the period 2018–2024 in most submarkets, which implies a shift in market power from the larger companies in favour of the smaller companies in the market. The export market is an exception to this (in terms of turnover), where the market power of the largest companies has tended to remain relatively stable over time.

Figure 5: Concentration ratio (CR4) over time (2018–2024)



PostNord is still the largest operator in all submarkets, except in the export market, where UPS has a larger share in terms of turnover. Since 2018, PostNord has continuously lost market shares in most submarkets in terms of both turnover and volume. The exception is the import market, where the company's market share in terms of turnover has tended to increase over time.

Figure 6: PostNord's market share over time (2018–2024)

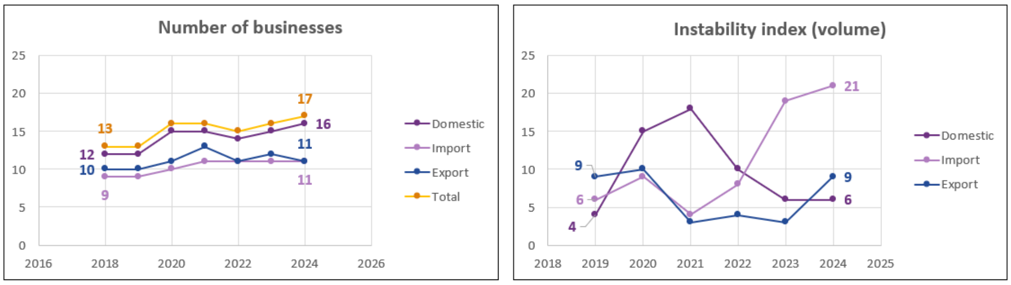


All of the above-mentioned concentration indicators measure in different ways how market power is distributed and to what extent it is concentrated among the larger companies in the market. PTS notes that all indicators (HHI, CR4, PostNord's market share) tend to be more stable over time (falling at a slower rate) in terms of turnover. This may be an indication of price competition in the market and may also indicate that, even though new companies in the market have managed to capture volume, the more established companies have continued to maintain their grip on market turnover, which is also an indication of market power.

Since 2018, the number of active companies has grown steadily, reflecting the fact that the parcel market is a growing market. In recent years, we have also seen a trend towards increased consolidation of existing players, which is a sign of a market in a more mature phase.

The degree of market share reallocation (instability index) has fluctuated over time. In the domestic market, the reallocation of volumes was slightly more intense during the pandemic but has since slowed down somewhat again. In the import and export markets, the reallocation tends to fluctuate from year to year, and in the import market in particular, the reallocation of volumes has increased in recent years, coinciding with growing imports from countries outside of Europe.

Figure 7: Number of active companies and degree of market share reallocation (2018–2024)



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

4. The market at the regional and local level

4.1 Introduction

In the previous chapter, we analysed the market at the national level and found that there is a positive trend with a decreasing market concentration. In this chapter, we take a closer look at the market at the regional and local levels, where the conditions for efficient parcel distribution vary. This is particularly true outside of urban areas, where there are challenges in the form of long distances between service points and delivery points. For this reason, PTS collects information from all operators in the parcel market regarding delivered volumes per business segment (parcel letters and B2C, B2B and C2X parcels) broken down by postcode. In addition, address details[12] are collected for all distributors' fixed service points (agents, parcel boxes, etc.). Taken together, this information enables a more detailed analysis of local conditions in the Swedish parcel market.

At the regional and local levels, there may be significant geographical differences in terms of distance and population density in different areas. This applies both between different parts of the country and between and within individual municipalities. However, we can initially conclude that there are no local areas that stand out negatively from a competition perspective. As in last year's market analysis, we also compiled data for 2024 on how many distributors reported (delivered) parcel volumes per postcode, and we can conclude that there is still competition in the parcel market in all parts of the country.[13]

In order to provide a more in-depth picture of competition and service in different parts of the country, this year's analysis focuses on market shares at the municipal level based on:

- The geographical conditions of the municipality in question (municipality type), and

[12] Including coordinates.

[13] Defined as having at least four distributors per postcode who reported delivered volumes in 2024. Of the nearly 11,000 geographical postcode areas, only 18 (approx. 0.17%) had fewer than four distributors, and for all of these there were obvious explanations as to why they deviated (e.g. industrial areas with individual corporate recipients, new divisions with new construction, etc.). All of these were spread across the country, including metropolitan areas, and none of them were located next to each other.

- The types of distributors operating in different parts of the country, broken down by submarket.

Section 4.2 reports and analyses volumes and market shares per county and municipality type.

Section 4.3 provides an in-depth picture of differences in terms of service availability, calculated as the road distance from the address to the nearest fixed service point. It also presents an analysis of how the existence of competing service networks and the establishment of parcel boxes have affected the availability (distance) of fixed service points.

Section 4.4 also contains a brief discussion of home deliveries.

4.1.1 Different categories of parcel distributors

In order to analyse competition and market shares per municipality and municipality type in a relevant way, we divided the operators into different categories based on how the parcels are mainly delivered to the recipients. The boundaries between the categories below are not clear-cut, as in principle all distributors deliver parcels in several different ways, but it is still possible to identify a number of relevant main categories:

1) *PostNord*: As the largest operator in the parcel market by far, with a total market share of just under 50% in terms of volume, it is relevant to distinguish this company from the others. PostNord also has such a wide range of products and delivers parcels in so many different ways that its operations cover all of the categories below.
2) *Last mile* operators: This category includes operators that essentially only work with home deliveries in the consumer market, mainly in the largest urban areas.[14]
3) *Parcel letter* providers: Includes operators that deliver parcel letters in conjunction with letter and morning newspaper delivery.[15]
4) (Providers with) *service networks* – includes operators that primarily base their parcel distribution on nationwide fixed agent/service networks (including parcel boxes).[16]

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[14] Airmee, Best and Velove
[15] Companies within the Early Bird and Citymail collaboration
[16] Bring, Bussgods, DHL, Ica Paket, Instabee, Schenker

5) *Other*: This category includes operators that are difficult to classify, offering a mix of parcel delivery services, including courier and express services, primarily focused on the business market.[17]

4.1.2 Business segments in the geographical analysis

The business segments included in the overall market analysis have been combined into two categories here to make the geographical analysis clearer and easier to understand:

1) Business market: B2B
2) Consumer market: Parcel letters, B2C, C2X[18]

4.2 Market shares at the municipal level

This section presents market shares per distributor category and municipality type[19] for the total market and separately for the business market and consumer market.

The total market

Table 13: Market share per distribution category and municipality type – Total market

Distributor category	1. Metropolitan municipalities	2. Dense municipalities near major cities	3. Dense municipalities in remote locations	4. Rural municipalities near major cities	5. Rural municipalities in remote locations	6. Rural municipalities in very remote locations
Postnord	47%	48%	49%	48%	51%	54%
Last mile operators	5%	2%	1%	1%	0,3%	0%
Parcel letter providers	10%	9%	8%	9%	8%	6%
Service network	34%	37%	39%	38%	38%	39%
Others	4%	4%	3%	3%	3%	2%

[17] DSV, Jetpak, UPS

[18] For the sake of clarity, we would like to point out that there may be small quantities of B2B shipments within the parcel letter volumes, as it is currently not possible to separate these volumes. However, we believe that these volumes are so low that they have no impact on the analysis and conclusions.

[19] See also Appendix 1 and p. 33 of the report *The Swedish Parcel Market 2023*, PTS-ER-2024:22

The business market

Table 14: Market share per distribution category and municipality type – Business market

Distributor category	1. Metropolitan municipalities	2. Dense municipalities near major cities	3. Dense municipalities in remote locations	4. Rural municipalities near major cities	5. Rural municipalities in remote locations	6. Rural municipalities in very remote locations
Postnord	46%	50%	52%	48%	51%	48%
Last mile operators	0%	0%	0%	0%	0%	0%
Parcel letter providers	0%	0%	0%	0%	0%	0%
Service network	32%	35%	36%	38%	38%	44%
Others	22%	15%	11%	14%	11%	7%

The consumer market

Table 15: Market share per distribution category and municipality type – Consumer market

Distributor category	1. Metropolitan municipalities	2. Dense municipalities near major cities	3. Dense municipalities in remote locations	4. Rural municipalities near major cities	5. Rural municipalities in remote locations	6. Rural municipalities in very remote locations
Postnord	47%	48%	48%	49%	50%	55%
Last mile operators	6%	3%	1%	2%	0,4%	0%
Parcel letter providers	12%	12%	11%	12%	11%	7%
Service network	35%	37%	39%	38%	38%	37%
Others	1%	1%	1%	1%	1%	0%

As shown in the tables above, when it comes to the total market, PostNord is generally somewhat stronger in rural areas and in more remote geographical areas in relation to the company's market share at the national level (45–50%[20]). This can be attributed to the consumer market, where competition from last mile operators is stronger in and around large cities and major urban areas. Competition from parcel operators is also somewhat weaker in the most remote municipalities.

In the business market, PostNord's market shares differ to a lesser extent between different types of geographical areas but tend to be slightly lower in metropolitan areas and in areas surrounding larger urban areas, where operators in the "other" category are significantly stronger than in more remote parts of the country.

Compared with the previous year, PostNord's market share has decreased in all of the municipality types examined[21]. This also applies to very remote rural municipalities, where the company has traditionally had a strong position, as well as in both the business and consumer markets. In the business market, we can see that

[20] In terms of volume

[21] Relates to PostNord's total market share by municipality type. This does not necessarily mean that PostNord's market share has decreased in all municipalities within each municipality type.

operators with service networks are, on the whole, almost as strong as PostNord in the most remote municipalities.

Table 16: PostNord's market share per municipality type, development 2023–2024

Postnord 2024 (2023)	1. Metropolitan municipalities	2. Dense municipalities near major cities	3. Dense municipalities in remote locations	4. Rural municipalities near major cities	5. Rural municipalities in remote locations	6. Rural municipalities in very remote locations
Market total	47% (48%)	48% (52%)	49% (53%)	48% (51%)	51% (54%)	54% (58%)
Business market	46% (46%)	50% (51%)	52% (54%)	48% (49%)	51% (54%)	48% (57%)
Consumer market	47% (48%)	48% (52%)	48% (53%)	49% (52%)	50% (54%)	55% (62%)

Looking at the differences between various categories of parcel distributors, the following emerges:

- Last mile: These operators have a relatively small share of market volumes (in the consumer market) and are primarily concentrated in metropolitan areas and larger cities. They have reported certain volumes even in more remote and sparsely populated municipalities, but not in the most remote areas.
- Service networks: Distributors other than PostNord that base their parcel distribution on fixed service networks have a stable market share of 34–39% across different geographical areas and an even more stable market share of 35–39% in the consumer market. However, they tend to be significantly stronger in the business market in the most remote areas, where there is a difference of 12 percentage points between the lowest share of 32% in metropolitan areas and the highest share of 44% in the most remote municipalities.
- Others: This category of distributors has a low share of total volumes but a significant share of the business market, mainly in metropolitan areas and areas around larger urban areas. However, they are weaker in more remote areas. In the consumer market, only small volumes have been reported, and no volumes have been delivered to the most remote areas.

In summary, PTS can conclude that there is broad competition with different forms of distribution and operators in most of the country, but that the distribution of parcels to the most remote geographical areas is mainly carried out by operators who base their distribution on fixed service points.

4.3 Service network and distance to service points

The dominant delivery method in Sweden is delivery to various types of fixed service points, such as agents and parcel boxes, as shown in several market reports.[22] And, as we noted in the previous section, operators that base their parcel deliveries on networks of fixed service points have a higher market share in more remote and sparsely populated areas. The distance to fixed service points is therefore of great importance for the ability to receive and send parcels in all parts of the country.

This year, PTS calculated the road distance[23] from all addresses[24] to the nearest fixed service point as part of its analysis of market and service data. We also analysed the importance of having competing service networks on the market, as well as the significance of the extensive establishment of parcel boxes in recent years.

The respective service networks of the various parcel distributors were previously reported in the PTS report "Swedish Postal Market 2025".[25] When it comes to deliveries to agents, in many cases each agent represents several different distributors, and in some places parcel lockers and agents are co-located. This analysis of distance to the nearest fixed service point is therefore based on unique geographical locations where there is some form of fixed service point. There are just over 9,000 of these, and in just over 40% of them, two or more operators deliver parcels.

4.3.1 Distance to the nearest service point

The average distance between an address and the nearest service point for the country as a whole is 2.1 km. However, there are significant differences in distance between different parts of the country. When comparing, for example, urban areas,[26] small towns[27] and other rural areas, the average distances are as follows:

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[22] See e.g. E-barometern 2024 Annual Report, PostNord/HUI Research

[23] Method: A series of route calculations (using pgRouting) along the road network (NVDB – national road database, with and without footpaths and cycle paths depending on geography) between all relevant addresses in the country in various combinations of service points (with/without parcel boxes, for example.
Omitted: Approximately 18,500 addresses had no road connection (representing approx. 0.6% of the total number of addresses). These are mainly addresses on islands with no fixed land connection. For these addresses, Euclidean distance (as the crow flies) was used instead.

[24] The calculation was limited to addresses where there is some form of active postal delivery (approximately 3 million).

[25] *Swedish Postal Market 2025*, PTS-ER-2025-6, section 3.8

[26] Localities with a population of at least 200 people.

[27] Localities with a population of between 50 and 199 people.

Table 17: Average distance from address to nearest service point

Average distance from address to nearest service point	
	Average distance (meters)
Sweden	2 100
Cities	1 250
Villages	4 200
Rural areas	5 200

As shown in the table, the distance to the nearest service point in urban areas is less than a quarter of the distance in rural areas. If we instead calculate a weighted average based on the number of postal recipients (households and businesses) per address, the average distance per recipient is even lower in urban areas, while remaining unchanged for small towns and being only marginally affected in rural areas.

Table 18: Average distance per household/business from address location to nearest service point

Genomsnittligt avstånd per hushåll/företag från adressplats till närmaste servicepunkt	
	Avstånd meter*
Sverige	*1 300*
Tätort	*800*
Småort	*4 200*
Övrig landsbygd	*5 150*

(avrundat till närmast 50-tal meter)

**Baserat på antal företag/hushåll per adress*

However, this report will only show the average distance per address, as a recipient-weighted distance primarily reflects the population density in different areas rather than the actual distance from the address to the nearest service point.

Average distance per county

Table 19: Average distance per county

Average distance from address point to nearest service point		
County		Distance meters
1	Stockholm	1 550
3	Uppsala	2 350
4	Södermanland	2 450
5	Östergötland	2 250
6	Jönköping	2 100
7	Kronoberg	2 200
8	Kalmar	2 650
9	Gotland	3 750
10	Blekinge	2 350
12	Skåne	1 500
13	Halland	1 800
14	Västra Götaland	1 950
17	Värmland	2 750
18	Örebro	1 850
19	Västmanland	1 850
20	Dalarna	2 600
21	Gävleborg	2 500
22	Västernorrland	2 800
23	Jämtland	4 000
24	Västerbotten	2 850
25	Norrbotten	3 000
Average Sweden:		**2 100**

At the county level, Jämtland and Gotland Counties stand out, as does Norrbotten County to some extent, with significantly longer distances to fixed service points compared to the average distance for the country, while the distances in Skåne and Stockholm Counties stand out with significantly shorter average distances. (See Appendix 3 for a map illustration of differences in average distances).

Average distance per municipality and municipality type

At the municipal level, the variations in distance are even greater than the differences between different counties. In Solna Municipality (Stockholm County), which is the municipality with the shortest average distance between addresses and the nearest service point, the distance is only 350 metres, while in Bräcke Municipality (Jämtland

County) it is 7,200 metres, which is the longest average distance for a single municipality.[28]

The Swedish Agency for Economic and Regional Growth's classification into different types of municipalities[29] has proven to be a valuable tool when analysing the highly variable results of the distance calculations for the 290 municipalities in the country. When the average distance is calculated by municipality type, it becomes clear that distance to a larger urban area in combination with population density has a significant impact on the distance to fixed service points.

Table 20: Average distance per municipality type

Municipality type	Average distance (meters)
1. Metropolitan municipalities	900
2. Densely populated municipalities near major cities	1 900
3. Densely populated municipalities in remote locations	2 450
4. Rural municipalities near major cities	2 700
5. Rural municipalities in remote locations	3 150
6. Rural municipalities in very remote locations	4 900
Average Sweden:	***2 100***

However, as shown in Appendix 2, there is considerable variation in the average distances between different municipalities (see also Appendix 3 for a map illustrating differences in average distances). Although there is a clear trend in the above table, it is not possible to draw any firm conclusions regarding individual municipalities based on the type of municipality to which they belong.

4.3.2 Analysis: the significance of competition and the establishment of parcel boxes for average distances

In this year's analysis, PTS calculated the impact on average distances between addresses and physical service points resulting from the existence of competing operators (alongside PostNord) that have an established network of physical service points throughout the country. The measured effect is certainly somewhat hypothetical, as there is no counterfactual scenario with a real monopoly situation to compare it with. However, the results show how competing (and thus

[28] See Appendix 2 for a complete summary of average distances per municipality. NB! Supplement the table with municipality type (1–6) per municipality.

[29] See Appendix 1.

complementary) service networks affect accessibility in the form of shorter distances.

In recent years, we have seen a very rapid establishment of parcel boxes on the market, as previously reported by PTS.[30] We have therefore also calculated how this development has affected the average distances that recipients have to the nearest fixed service point.

At the national level, the calculations show that the existence of competing service networks shortens the average distance by 250 metres and that the establishment of parcel boxes shortens the distance by 350 metres. Note that these indicators cannot be summed to any form of combined impact; see the comment in the footnote. [31]

Generally speaking, both competition and the establishment of parcel boxes have resulted in shorter distances to the nearest service point, regardless of which part of the country is concerned. However, the significance of these factors varies greatly between different parts of the country.

Table 21: Impact of competition and the establishment of parcel boxes on distance

Impact of competition and the establishment of parcel boxes				
Municipality type	Impact on distance (meters)		Relative impact on distance	
	Competition	Boxes	Competition	Boxes
1. Metropolitan municipalities	-100	-250	-10%	-22%
2. Densely populated municipalities near major cities	-200	-400	-10%	-17%
3. Densely populated municipalities in remote locations	-400	-400	-14%	-14%
4. Rural municipalities near major cities	-350	-250	-11%	-8%
5. Rural municipalities in remote locations	-300	-200	-9%	-6%
6. Rural municipalities in very remote locations	-950	-50	-16%	-1%
Average Sweden:	***-250***	***-350***	***-11%***	***-14%***

The table shows that the establishment of parcel boxes has had the greatest impact on shortening distances to the nearest service point in metropolitan municipalities and other densely populated municipalities, while competing service networks have primarily shortened distances in more remote municipalities, although the positive impact is noticeable in all parts of the country. Although the impact of the

[30] Which amounted to just over 8,200 at the beginning of 2025. *Swedish Postal Market 2025*, PTS-ER-2025-6, p. 41

[31] The impact calculations were carried out in such a way that, for impact on competition, PostNord's service network (including parcel boxes) was compared with the total service network, which includes all distributors' networks (including parcel boxes). For box impact, the collective network with boxes was compared with the collective network without boxes. Since these calculations have different starting points and excerpts from the basic data, it is not possible to draw any conclusions that competing networks + the establishment of boxes together would have reduced the distances by *x* metres in total.

establishment of parcel boxes has been more marginal in rural municipalities, it can be concluded that both the establishment of parallel service networks and parcel boxes has had a positive impact on the accessibility of fixed service points in all types of municipalities.

In summary, we can conclude that, although competition reaches all parts of the country and the distances to fixed service points generally appear to be reasonable, there are parts of the country where physical access to sending and receiving parcels and obtaining other services related to various types of parcel delivery can pose a significant challenge to living and working there. This is particularly true in municipality types 5 and 6 (rural municipalities located in a remote or very remote area), where distances to fixed service points are generally significantly longer than in the rest of the country.

In areas where distances are long and where the service points of different distributors are not co-located, additional challenges may arise in cases where different parcels are delivered to different service points.

What is not included in previous distance calculations[32] is the complementary service in the form of the possibility of parcel delivery within PostNord's rural postal delivery service, as well as the possibility in certain cases of receiving parcels at stops along Bussgods' bus routes in the three northern counties in which the company operates.[33] See further in the next section.

For a supplementary picture of the availability of postal services and other types of commercial services, please see the Swedish Agency for Economic and Regional Growth's report *Tillgänglighet till kommersiell service 2024* [Availability of commercial services 2024].[34]

4.3.3 Home delivery

PTS does not currently collect any information from parcel distributors on the market regarding volumes per delivery channel (agent, parcel box, home delivery, etc.), and we therefore have no way of determining what proportion of all parcel deliveries are made in the form of home deliveries or to which parts of the country this type of delivery actually extends. Home delivery is offered by several market operators throughout the country[35], but this normally involves a completely different price

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[32] This is for methodological reasons. More is required of recipients to use the services, and it is also not possible to include any access to the services in the route calculations made by PTS. In addition, these forms of complementary service are not to be regarded as fixed service points.

[33] Västerbotten, Västernorrland and Norrbotten.

[34] Swedish Agency for Economic and Regional Growth, publication number: 0478

[35] However, there may be certain geographical exceptions.

structure than for a standard delivery to a fixed service point, especially in more remote areas. However, as mentioned in the previous section, there are certain services that complement agent deliveries in the form of parcel delivery via PostNord's rural postal service or delivery along bus routes within Bussgods' area of operation.

However, certain volumes relating to home deliveries can be distinguished from the total parcel volumes on the market. Parcel letters, for example, are a form of home delivery of small parcels that reach recipients' mailboxes in all parts of the country.[36] This segment accounts for approximately 27% of the consumer market. In addition, we have the "last mile operators" with approximately 3.5% of the consumer market, plus the home delivery volumes originating from other distributor categories.

4.4 Concluding remarks: the market at the regional and local level

The analysis conducted by PTS shows that there are no local areas without competing parcel distributors and that there is competition in the parcel market in all parts of the country. However, there is a general tendency for PostNord to be somewhat stronger in rural areas and in more remote geographical areas in relation to the company's total market share, mainly in the consumer market. However, the differences decreased in 2024 compared to 2023.

Widespread competition and the establishment of parcel boxes have resulted in shorter distances to the nearest service point, regardless of which part of the country is concerned. Competing service networks have had the greatest impact on accessibility in remote parts of the country, while the establishment of parcel boxes has had the greatest impact in large urban municipalities and other densely populated municipalities. It is also the case that the distribution of parcels to the most remote geographical areas is mainly carried out by operators who base their distribution on fixed service points.

Although competition reaches all parts of the country and the distances to fixed service points generally appear to be reasonable, there are parts of the country where physical access to postal services can pose a significant challenge to living and working there.

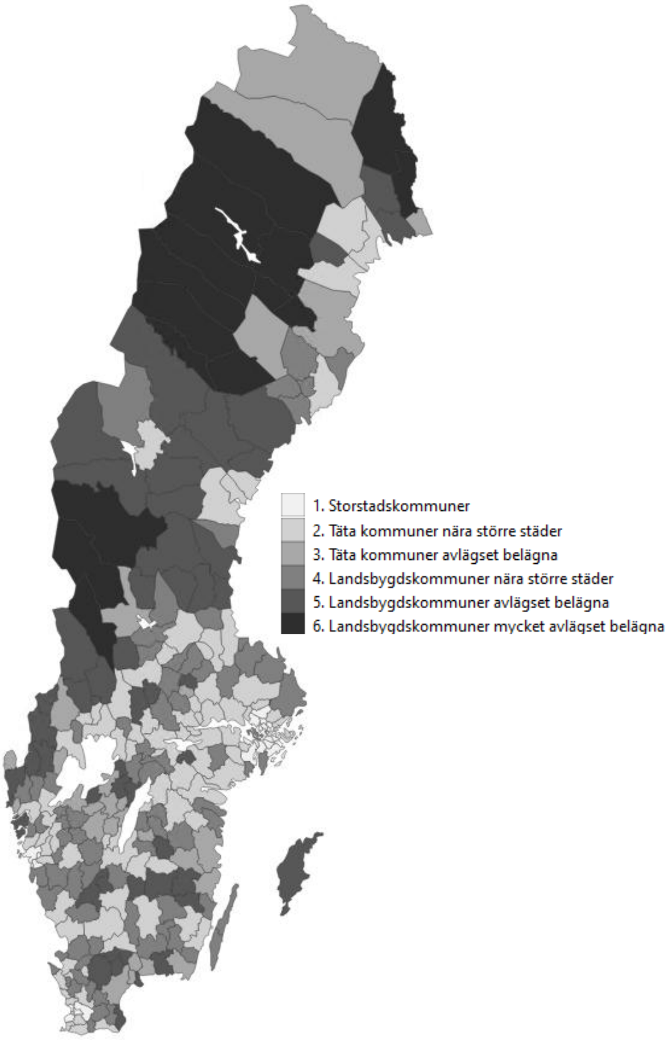
[36] Which is available throughout the country via PostNord's "Varubrev" service (also in the form of larger "regular" postal items), and in certain parts of the country via Citymail and the companies collaborating within Early Bird (this year's data collection shows that, in 2024, PostNord was the sole provider of parcel letters in 5 of 290 municipalities, as well as in 30% of the postcodes to which parcel letters were delivered during the year).

APPENDICES

Appendix 1: Municipality types

Type of municipality	Description
1. Metropolitan municipalities	More than 80 percent of the population lives in urban areas, and together with adjacent municipalities, they have a combined population of at least 500,000 inhabitants.
2. Densely populated municipalities near major cities	More than 50 percent of the population lives in urban areas. The majority of the municipality's population has less than a 45-minute drive to an urban area with at least 50,000 inhabitants.
3. Densely populated municipalities in remote locations	More than 50 percent of the population lives in urban areas. The majority of the municipality's population has more than a 45-minute drive to an urban area with at least 50,000 inhabitants.
4. Rural municipalities near major cities	More than 50 percent of the population lives in rural areas. The majority of the municipality's population has less than a 45-minute drive to an urban area with at least 50,000 inhabitants.
5. Rural municipalities in remote locations	More than 50 percent of the population lives in rural areas. The majority of the municipality's population has more than a 45-minute drive to an urban area with at least 50,000 inhabitants.
6. Rural municipalities in very remote locations	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 8: Map of different municipality types



Appendix 2: Average distance per municipality

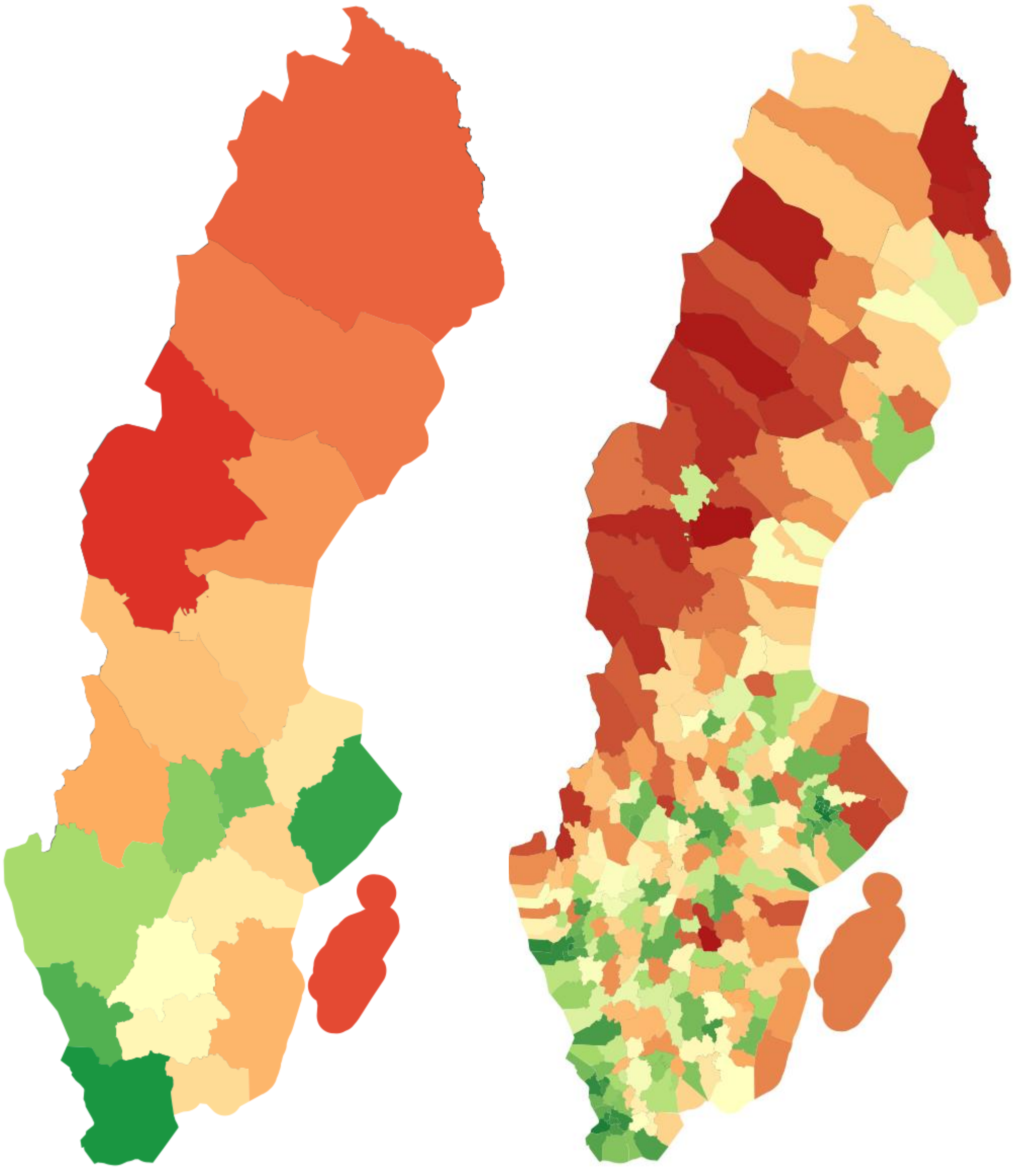
Average distance in meters from address point to the nearest service point

Municipality		Distance	Municipality		Distance	Municipality		Distance
114	Upplands Väsby	800	586	Mjölby	1 750	1272	Bromölla	1 900
115	Vallentuna	2 250	604	Aneby	4 200	1273	Osby	1 750
117	Österåker	2 400	617	Gnosjö	1 900	1275	Perstorp	2 100
120	Värmdö	4 650	642	Mullsjö	1 600	1276	Klippan	1 900
123	Järfälla	650	643	Habo	2 000	1277	Åstorp	950
125	Ekerö	1 700	662	Gislaved	2 200	1278	Båstad	1 900
126	Huddinge	1 300	665	Vaggeryd	3 550	1280	Malmö	600
127	Botkyrka	1 200	680	Jönköping	1 450	1281	Lund	950
128	Salem	1 050	682	Nässjö	2 400	1282	Landskrona	1 500
136	Haninge	1 600	683	Värnamo	2 100	1283	Helsingborg	900
138	Tyresö	1 450	684	Sävsjö	2 000	1284	Höganäs	1 600
139	Upplands-Bro	1 700	685	Vetlanda	2 950	1285	Eslöv	1 650
140	Nykvarn	2 900	686	Eksjö	1 950	1286	Ystad	1 200
160	Täby	800	687	Tranås	2 100	1287	Trelleborg	1 650
162	Danderyd	800	760	Uppvidinge	2 300	1290	Kristianstad	2 000
163	Sollentuna	750	761	Lessebo	1 150	1291	Simrishamn	2 700
180	Stockholm	450	763	Tingsryd	2 350	1292	Ängelholm	1 600
181	Södertälje	1 550	764	Alvesta	2 150	1293	Hässleholm	2 250
182	Nacka	1 250	765	Älmhult	3 500	1315	Hylte	3 000
183	Sundbyberg	500	767	Markaryd	2 350	1380	Halmstad	1 150
184	Solna	350	780	Växjö	1 600	1381	Laholm	2 050
186	Lidingö	850	781	Ljungby	3 050	1382	Falkenberg	2 150
187	Vaxholm	1 200	821	Högsby	3 150	1383	Varberg	1 800
188	Norrtälje	4 350	834	Torsås	3 250	1384	Kungsbacka	2 000
191	Sigtuna	1 550	840	Mörbylånga	3 650	1401	Härryda	1 300
192	Nynäshamn	2 900	860	Hultsfred	1 850	1402	Partille	750
305	Håbo	2 100	861	Mönsterås	1 850	1407	Öckerö	800
319	Älvkarleby	2 150	862	Emmaboda	2 350	1415	Stenungsund	2 000
330	Knivsta	2 100	880	Kalmar	1 600	1419	Tjörn	2 400
331	Heby	2 350	881	Nybro	2 900	1421	Orust	3 650
360	Tierp	2 950	882	Oskarshamn	2 700	1427	Sotenäs	2 800
380	Uppsala	1 550	883	Västervik	3 300	1430	Munkedal	2 850
381	Enköping	3 750	884	Vimmerby	2 600	1435	Tanum	3 550
382	Östhammar	3 700	885	Borgholm	3 400	1438	Dals-Ed	5 600
428	Vingåker	3 400	980	Gotland	3 750	1439	Färgelanda	3 050
461	Gnesta	3 250	1060	Olofström	3 200	1440	Ale	1 500
480	Nyköping	2 650	1080	Karlskrona	2 300	1441	Lerum	1 450
481	Oxelösund	1 150	1081	Ronneby	2 550	1442	Vårgårda	3 350
482	Flen	2 300	1082	Karlshamn	1 650	1443	Bollebygd	2 100
483	Katrineholm	2 700	1083	Sölvesborg	2 700	1444	Grästorp	2 250
484	Eskilstuna	2 050	1214	Svalöv	1 700	1445	Essunga	1 850
486	Strängnäs	2 450	1230	Staffanstorp	1 050	1446	Karlsborg	2 550
488	Trosa	2 550	1231	Burlöv	700	1447	Gullspång	2 900
509	Ödeshög	3 900	1233	Vellinge	1 250	1452	Tranemo	2 700
512	Ydre	7 000	1256	Östra Göinge	1 750	1460	Bengtsfors	2 900
513	Kinda	4 050	1257	Örkelljunga	3 000	1461	Mellerud	2 450
560	Boxholm	4 900	1260	Bjuv	1 150	1462	Lilla Edet	3 650
561	Åtvidaberg	2 850	1261	Kävlinge	1 450	1463	Mark	2 300
562	Finspång	3 050	1262	Lomma	900	1465	Svenljunga	3 550
563	Valdemarsvik	4 450	1263	Svedala	1 200	1466	Herrljunga	2 650
580	Linköping	1 300	1264	Skurup	1 700	1470	Vara	2 250
581	Norrköping	2 000	1265	Sjöbo	2 300	1471	Götene	2 250
582	Söderköping	3 050	1266	Hörby	2 450	1472	Tibro	1 400
583	Motala	2 050	1267	Höör	2 700	1473	Töreboda	2 750
584	Vadstena	2 750	1270	Tomelilla	2 400	1480	Göteborg	900

Average distance in meters from address point to the nearest service point

Municipality		Distance	Municipality		Distance	Municipality		Distance
1481	Mölndal	1 050	1984	Arboga	1 850	2482	Skellefteå	2 750
1482	Kungälv	2 550	2021	Vansbro	2 600	2505	Arvidsjaur	3 600
1484	Lysekil	2 300	2023	Malung-Sälen	4 350	2506	Arjeplog	6 200
1485	Uddevalla	2 350	2026	Gagnef	2 350	2510	Jokkmokk	2 800
1486	Strömstad	4 450	2029	Leksand	2 650	2513	Överkalix	5 950
1487	Vänersborg	1 900	2031	Rättvik	3 350	2514	Kalix	2 900
1488	Trollhättan	1 200	2034	Orsa	2 650	2518	Övertorneå	6 150
1489	Alingsås	1 850	2039	Älvdalen	5 400	2521	Pajala	6 450
1490	Borås	1 650	2061	Smedjebacken	3 250	2523	Gällivare	3 500
1491	Ulricehamn	2 900	2062	Mora	2 650	2560	Älvsbyn	2 700
1492	Åmål	2 450	2080	Falun	2 150	2580	Luleå	2 150
1493	Mariestad	2 450	2081	Borlänge	1 500	2581	Piteå	2 300
1494	Lidköping	2 250	2082	Säter	2 450	2582	Boden	2 600
1495	Skara	2 150	2083	Hedemora	3 300	2583	Haparanda	4 200
1496	Skövde	1 450	2084	Avesta	2 100	2584	Kiruna	2 750
1497	Hjo	2 300	2085	Ludvika	2 700			
1498	Tidaholm	2 800	2101	Ockelbo	4 250			
1499	Falköping	2 000	2104	Hofors	2 200			
1715	Kil	2 450	2121	Ovanåker	3 550			
1730	Eda	3 100	2132	Nordanstig	3 400			
1737	Torsby	4 500	2161	Ljusdal	3 700			
1760	Storfors	4 850	2180	Gävle	1 950			
1761	Hammarö	1 450	2181	Sandviken	1 800			
1762	Munkfors	1 900	2182	Söderhamn	2 450			
1763	Forshaga	2 200	2183	Bollnäs	2 450			
1764	Grums	2 600	2184	Hudiksvall	2 700			
1765	Årjäng	5 050	2260	Ånge	3 650			
1766	Sunne	3 650	2262	Timrå	2 700			
1780	Karlstad	1 550	2280	Härnösand	2 250			
1781	Kristinehamn	2 150	2281	Sundsvall	2 300			
1782	Filipstad	4 150	2282	Kramfors	3 450			
1783	Hagfors	3 350	2283	Sollefteå	3 800			
1784	Arvika	2 900	2284	Örnsköldsvik	2 850			
1785	Säffle	3 500	2303	Ragunda	4 600			
1814	Lekeberg	2 550	2305	Bräcke	7 200			
1860	Laxå	2 500	2309	Krokom	4 600			
1861	Hallsberg	1 650	2313	Strömsund	5 700			
1862	Degerfors	2 300	2321	Åre	3 850			
1863	Hällefors	3 050	2326	Berg	5 800			
1864	Ljusnarsberg	3 850	2361	Härjedalen	4 650			
1880	Örebro	1 300	2380	Östersund	2 050			
1881	Kumla	1 100	2401	Nordmaling	3 650			
1882	Askersund	3 500	2403	Bjurholm	4 150			
1883	Karlskoga	1 450	2404	Vindeln	3 000			
1884	Nora	2 950	2409	Robertsfors	3 900			
1885	Lindesberg	2 500	2417	Norsjö	4 450			
1904	Skinnskatteberg	4 300	2418	Malå	3 200			
1907	Surahammar	2 200	2421	Storuman	4 900			
1960	Kungsör	2 150	2422	Sorsele	4 350			
1961	Hallstahammar	1 800	2425	Dorotea	4 650			
1962	Norberg	2 100	2460	Vännäs	2 550			
1980	Västerås	1 250	2462	Vilhelmina	6 900			
1981	Sala	2 750	2463	Åsele	5 250			
1982	Fagersta	2 000	2480	Umeå	1 750			
1983	Köping	2 600	2481	Lycksele	4 550			

Appendix 3: Distance map per county and per municipality[37]



[37] The colour scale indicates how each county and municipality compares to the average distance at the national level. Green = shorter average distance, Yellow = around average, Red = above average. As the variations are greater at the municipal level, the colours for the outer values of the spectrum have been intensified on that map.

Map: Overview – county, municipality and municipality type