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*Postal and small freight delivery  
statistics 2005*

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## *FOREWORD*

The Postal and small freight delivery statistics is a statistical publication compiled by Statistics Finland and jointly published by Statistics Finland and the Finnish Communications Regulatory Authority. The information will be used for monitoring the competition prevailing in the postal sector, and for producing data for EU statistics and for other information needs. It will also help to promote EU attempts at developing postal statistics further.

The objective of the statistics is to produce information on the volume of deliveries in postal services, that is, in branch 6411, National post activities, and the volume of other deliveries in branch 6411 and particularly as regards branch 6412, Other delivery and courier services. Selected enterprises not classified in these branches are also examined here.

When the production of official postal statistics (OSF) was terminated, the postal statistics were compiled by the State business enterprise Posts and Telecommunications of Finland and subsequently by PT Finland Ltd, until Statistics Finland and the Finnish Communications Regulatory Authority started the joint production of the Postal and small freight delivery statistics in 1998. The Ministry of Transport and Communications was also involved in the development of statistics production.

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## *SUMMARY*

As competition is increasing in postal services, it is important to obtain information on the present situation in the field and the changes that have taken place. The aim of this publication was to provide information on licensed postal deliveries, which is part of the deliveries in branch 6411 (National post activities).

The publication also contains information on the transport and delivery of small freight outside the sphere of the postal services proper in branches 6411 and 6412. An adequate impression of this activity was deemed to be gained by concentrating attention on the largest firms operating in this field in branch 6412. Selected enterprises not classified in this branch are also examined here. Delivery of internal mail in enterprises is not included in the production of statistics.

The report focuses primarily on postal services, which were the main motivation for this statistical classification and it is in this sphere that the data are presented with the greatest accuracy. The classification used outside the sphere of the actual postal services was also influenced by the fact that the companies concerned were not able to classify their deliveries with sufficient accuracy, and that data on goods of certain types are available only from individual companies.

Collection of data from companies concerning the year 2005 was started in May 2006. The data were collected from the companies by a mailed questionnaire inquiring about the volume of postal services and the resulting financial turnover for 2005. As far as the actual postal service is concerned, the statistics represent 100 per cent coverage, while the response rate for companies in the category of other delivery and courier services was 70 per cent and that for the companies selected for more detailed examination was 92 per cent. The total response rate of the inquiry was 75 per cent.

Postal deliveries within Finland in 2005 amounted to a total of 3,753 million items. Of domestic deliveries, 1,144 million, or around 30 per cent were part of the so-called universal service subject to a postal licence. (Universal service is defined in Section 4 on pages 10-11.) The total turnover from domestic deliveries was EUR 1,028 million and deliveries belonging to the universal service accounted for 56 per cent of the turnover.

A total of 2,609 million small freight deliveries within Finland were recorded outside the universal services proper in 2005, giving a turnover of EUR 450 million. The majority of the deliveries outside the postal services proper, or 1,577 million items, was unaddressed mail, followed by newspapers and magazines.

International mail amounted to 112 million items in 2005 in the examined enterprises and the turnover from this was EUR 237 million. The volume of international deliveries decreased by 19 per cent and the turnover from them was 8 per cent lower than in the previous year. International deliveries are examined as a whole and those belonging to the universal service are not separated from the other international deliveries.

## *1 INTRODUCTION*

The official postal statistics produced by the General Directorate of Posts and Telecommunications in Finland terminated in 1988, and after that until 1993 these statistics were compiled by Posts and Telecommunications of Finland, a State business enterprise. The Act on postal services, which came into force at the beginning of 1994 (from the beginning of 2002, the Postal Services Act), distinguished between administration and business operations, as a result of which the supervision of the laws on postal services and the regulations issued by virtue of these was transferred to the Telecommunications Administration (from 1 September 2001, the Finnish Communications Regulatory Authority), while the compilation of postal statistics was assigned to PT Finland Ltd. The duties of the Telecommunications Administration were expanded in 1996 to cover all postal statistics in Finland.

Discussions were launched by the Telecommunications Administration with Statistics Finland on generating the information required for recommencing the drawing up of official postal statistics in Finland, monitoring the competition emerging in the field, producing information for inclusion in EU statistics and satisfying other information needs. A working group was consequently set up by Statistics Finland on 25 September 1997 to develop the compilation of postal statistics. The group was responsible for specifying the position of the actual postal service sector with regard to other types of delivery services for small freight, surveying actual information needs, drawing up a proposal for organising and financing the compilation of postal statistics, outlining the existing data and providing a statistical summary of such data. The summary and a proposal for the content and organisation of postal statistics were submitted by the group on 15 December 1997.

Statements of opinion on the report drawn up by the group were obtained from companies providing postal and small freight services and their interest groups, and the draft inquiry form was amended in accordance with these opinions. In addition, a meeting was arranged by Statistics Finland on 20 April 1998 with organisations representing and undertaking the delivery of small freight items. This led to some further adjustment of the classification of the information content of the inquiry form so as to come closer to satisfying the needs expressed by the respondents' representatives.

The Telecommunications Administration and Statistics Finland agreed on 4 May 1998 that the latter should draw up a set of statistics on postal and small freight delivery services every year. The results of the statistics compiled according to the recommendation of the working group are published yearly in the publication series of the Finnish Communications Regulatory Authority.

The data contained in the statistics cover the years from 1996 to 2005. The data for earlier years have been updated so that the figures for different years would be mutually comparable. Until 2002, the breakdown used in the Postal and small freight delivery statistics was the Standard Industrial Classification, when described were the volume of the actual postal services and the incomes gained from these in the licensed postal sector (TOL 6411) and other branches, particularly in 6412, together with the scope of comparable delivery services in other branches and the related incomes. At the beginning of 2002, the Postal Services Act came into force, replacing the previous Act on postal services. The Postal Services Act defines the postal services subject to licence and assigns the universal service obligation to Finland Post Corporation. From the statistical year 2002 a distinction

has been made in the publication between licensed postal services and other postal and small freight deliveries. The purpose is to examine the volume of licensed domestic deliveries by the postal services proper. Non-licensed deliveries in branch 6411, such as deliveries of newspapers and magazines, unaddressed mail and other than universal service parcels are presented together with deliveries in other branches. International mail is examined as a distinct whole. A summary of postal and small freight deliveries is given at the end of the publication.

The main focus is on the most recent statistical year, 2005, which is compared with the previous year. Data for the years before the previous year are presented in time series charts. The delivery types examined include letters, parcels, unaddressed mail, and newspaper and magazine deliveries. Domestic deliveries and international mail are examined separately. Deliveries belonging to the universal service are presented in Section 4.1 in accordance with the Postal Services Act that came into force on 1 January 2002. Section 5 gives details of the deliveries of the postal services 6411 falling outside the licensed universal service, such as deliveries of newspapers and magazines, unaddressed mail and other than universal service parcels.

## *2 SUBJECT MATTER OF THE STATISTICS*

### *2.1 Defining the target group*

The target group is defined and examined here on the basis of Statistics Finland's Standard Industrial Classification 2002. The principal activity of a company is determined by the value added generated in the establishments of the company operating within different sectors of industry. The primary focus is on the national postal service, although attention is also paid to the volume of mail handled outside this service. Companies operating in the post and courier activities sector (TOL 641) were defined on the basis of Statistics Finland's Business Register data, and certain companies representing other fields were also defined as falling within the statistical frame employed here. These companies were defined by the postal statistics working group. The statistical unit used is enterprise.

The majority of the enterprises discussed here represent sectors 6411, National post activities, and 6412, Other delivery and courier services. The services in the latter category include the collection, transportation and delivery of letters, parcels, documents, newspapers and magazines, for example, by instances other than the national postal service. It also covers posting services connected with these, including addressing and provision of envelopes.

Major instances of the delivery of small freight items pursued as part of other forms of business were also considered to fall within the scope of these statistics. Companies engaged in deliveries of this kind operate in such fields as railways, bus services and taxi services, road freight transports, bus stations, forwarding and freighting. The working group defined the main companies engaged in such transport in these sectors in a statistical summary accompanying the report.

Of the above sectors, the inquiry achieves 100 per cent coverage with respect to the national post, while the combined turnovers of the companies providing other delivery and courier services make up 87 per cent of the total turnover recorded for the field. Thus, all in

all, the data contained in this survey cover around 98 per cent of the total turnover in the fields concerned.

The basic set of companies surveyed for statistical purposes in 2005 comprises 60 providers of postal and small freight services, two of them representing the actual postal services, 46 other delivery and courier services and 12 separately defined fields involving the delivery of small freight.

## *2.2 Background information about the branches of industry concerned*

According to the Statistics Finland Business Register inquiry database, there were 305 enterprises operating in this sector (TOL 641) at the end of 2002, 308 at the end of 2003, 310 at the end of 2004, and 303 at the end of 2005. Towards the end of 2006, the number of enterprises in the inquiry database was 310. The companies in the database include some that are not contained in the actual annual business statistics because they do not conform to the criteria listed below. The inquiry database nevertheless serves as a more rapid means of gaining information on the situation prevailing in the business sector at a given point in time. The table below shows the number of companies engaged in post and courier services in companies that have been operating for at least six months, employed at least 0.5 persons and had a turnover in excess of EUR 9,187 per year in 2004. The data in Table 1 derived from the publication Finnish Enterprises 2004 also include information obtained from Posten på Åland.

Table 1. Postal and courier services in 2000 - 2004.

	2000	2001	2002	2003	2004
<b>Companies</b>					
Postal and courier services	244	272	278	264	268
Postal services	2	2	2	2	2
Other delivery and courier services	242	270	276	262	266
<b>Establishments</b>					
Postal and courier services	1 536	1 517	1 045	1 001	960
Postal services	1 264	1 215	741*	701*	654*
Other delivery and courier services	272	302	304	300	306
<b>Personnel</b>					
Postal and courier services	23 542	22 750	21 704	21 418	21 855
Postal services	19 895	18 757	17 730	17 731	17 845
Other delivery and courier services	3 647	3 993	3 974	3 687	4 010
<b>Turnover (EUR mil. )</b>					
Postal and courier services	1 248	1 251	1 304	1 316	1 355
Postal services	969	946	996	1 016	1 053
Other delivery and courier services	279	305	308	300	302

\* The statistical methodology used for Finland Post Corporation's post offices was changed in 2002.

The figures for 2005 will be completed in February 2007.

The number of establishments in the table is derived from the publication Finnish Enterprises 2004. According to Finland Post Corporation, the number of its own post offices in 2004 was 294 and that of postal agents 1,017. The turnover in the postal services branch has grown yearly starting from 2002. In 2003 the turnover grew by 2 per cent and in 2004 the growth amounted to 4 per cent.

The number of companies representing sector 6412, Other delivery and courier services, and their establishments has been growing yearly from 2000 to 2004, except for the year 2003. In 2004 the joint turnover of sector 6412 increased by 1 per cent from the year before.

In 2004 the total turnover of the sectors was EUR 1,355 million, which was 3 per cent higher than in 2003. In 2004 the proportion of national post (6411) of the joint turnover in this branch amounted to 78 per cent.

According to unconfirmed data for the year 2005, the total turnover in post and courier activities (TOL 641) in 2005 was EUR 1,350 million, which was on level with the previous year. Of this the national post made up EUR 1,129 million and other delivery and courier services EUR 221 million. Changes in the proportions between branches were due to company restructurings. Trends in the turnover of the various sectors in 2001-2005 are given in Figure 1.

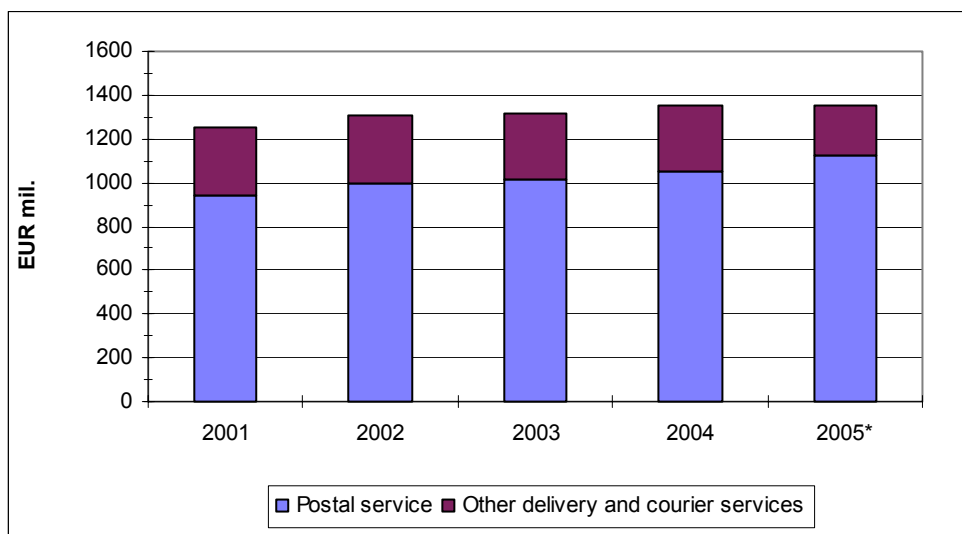


Figure 1. Turnover of the national post and other delivery and courier services in 2001 - 2005.

\* The final figure will be available in February 2007.

### 3 DATA COLLECTION AND PROCESSING

#### 3.1 Questionnaire

Information was collected from the companies by means of mailed questionnaires, the information content and classification scheme of which had been defined by the working group set up to develop statistics on the postal services. The classification was also amended according to suggestions by representatives of the respondents. The questionnaire was simplified on the basis of an inquiry made in 1999. The questionnaire still inquired about such matters as whether the company was part of an international group, and asked companies to indicate the numbers of items delivered and the resulting incomes separately for domestic and international mail. The volumes and incomes recorded for inland mail were specified to type in terms of their weight range. In the case of international mail, this information was to be reported separately according to their type and place of origin or destination. Contact information for the persons responsible for the replies was also requested. The questionnaire form used for 2005 is in Appendix 1.

#### 3.2 Data processing

The information gained from the replies was recorded and supplemented with turnover data on companies operating in sectors 6411 and 6412 derived from Statistics Finland's Business Register and the business taxation material. No turnover data were included in the statistics at all for companies representing other sectors, as they gain a large proportion of their turnover from services other than small freight deliveries.

All the information recorded was checked, and some companies were contacted in the course of the work in order to verify their performance figures and classifications.

General information on Post and courier activities (TOL 641), National post activities (TOL 6411) and Other delivery and courier services (TOL 6412) was collected from the Business Register, including figures for the numbers of companies, establishments and staff in each sector and its total turnover. General data on the activities of the companies were produced for the period 2000-2004.

Information on the delivery of newspapers was derived from statistics on the distribution of morning papers maintained by the Finnish Newspaper Association. Data were extracted only for "pure" delivery organisations, as it was only in this case that the turnover data from the business taxation material could be assigned to the same companies. Since newspaper publishing houses gain the majority of their turnover from sources other than actual deliveries, information from such sources does not serve to describe the activities concerned here. Thus deliveries by units within such publishing houses, if not divided off as separate companies or establishments, belong to TOL category 2212, Newspaper publishing, or 2221, Newspaper printing.

### 3.3 Response rate

The questionnaires were posted in May to a total of 60 companies engaged in postal services and/or the delivery of small freight, which made up the population examined here. The response rate achieved with the first set of questionnaires was around 40 per cent, and new questionnaires were sent out to non-responders at the beginning of August. Companies not responding to this second attempt either were contacted by phone or by email in August-September. After all the above measures, the response rate reached 75 per cent, the figure being a full 100 per cent for the national postal service but 70 per cent for other delivery and courier services (6412). Of the companies included in the survey that lay outside these sectors, 92 per cent replied.

Table 2. Number of companies contained in the statistics and response rate.

Industry (TOL)	Companies	Response
	N	rate %
Postal services, TOL 6411	2	100
Other delivery and courier services, TOL 6412	46	70
Companies defined separately	12	92
<b>Total</b>	<b>60</b>	<b>75</b>

Examined in terms of turnover, the overall response rate for TOL categories 6411 and 6412 is as high as 97 per cent, the figure for other delivery and courier services (6412) being 82 per cent, while that for the national post (6411) is of course again 100 per cent.

## 4 POSTAL SERVICES SUBJECT TO LICENCE

Postal services constitute category 6411 of the Standard Industrial Classification (TOL 2002). In practice, the sector includes postal services subject to licence, Finland Post Corporation's other reception, transport and distribution of mail than that subject to licence, and postal services in Åland. There are currently two companies in this sector: Finland Post Corporation and Posten på Åland. The activity of Finland Post Corporation is partly subject to licence. Posten på Åland provides postal services in the Åland Islands under a special law for that region, *Landskaps lag om Posten på Åland*. The companies engaged in postal activities are fully Finnish, i.e. they are not part of any international group.

From 1 January 2002 postal services are regulated in Finland (excluding Åland) by the Postal Services Act (313/2001). The licence to provide postal services is granted by the Government. Licensed postal services cover all addressed letters up to 2 kg, parcels up to 10 kg and incoming parcels up to 30 kg belonging to universal service. Registered and insured items are also subject to licence, while deliveries of newspapers and magazines and unaddressed mail and other than universal service parcels are not. Delivery of internal mail in enterprises is not included in the statistics.

According to the Postal Services Act, a so-called universal service must be available in the whole country. Finland Post Corporation is specified in its licence as the provider of universal service. The universal service comprises delivery services for up to 2 kg letters

and up to 10 kg parcels, transport and delivery services for incoming parcels up to 30 kg and a service for registered and insured post. The universal service also includes the obligation to provide a facility for postal services and one collection and distribution on each working day.

#### 4.1 Universal service

The next section describes domestic deliveries within the universal service offered by Finland Post Corporation as a whole. Section 5 presents all international mail belonging to the universal service and all other deliveries in branch 6411 not in the scope of universal service in conjunction with deliveries made in other branches of industry.

##### 4.1.1. Letters

The volumes of letters delivered within the universal service and the turnover received in 2004 and 2005 are given in Table 3. In 2005 the number of letters in the universal service was 1,126 million, producing a turnover of EUR 484 million in all. The volume of letters and the turnover from letters delivered were on level with the previous year.

Table 3. Volume of inland letters delivered within the universal service and revenues from it.

Letters	2004		2005		change	
	revenues	number	revenues	number	revenues	number
	EUR 1000	1000 pcs	EUR 1000	1000 pcs	%	%
<b>Total</b>	<b>482 608</b>	<b>1 122 953</b>	<b>484 315</b>	<b>1 125 900</b>	<b>0</b>	<b>0</b>

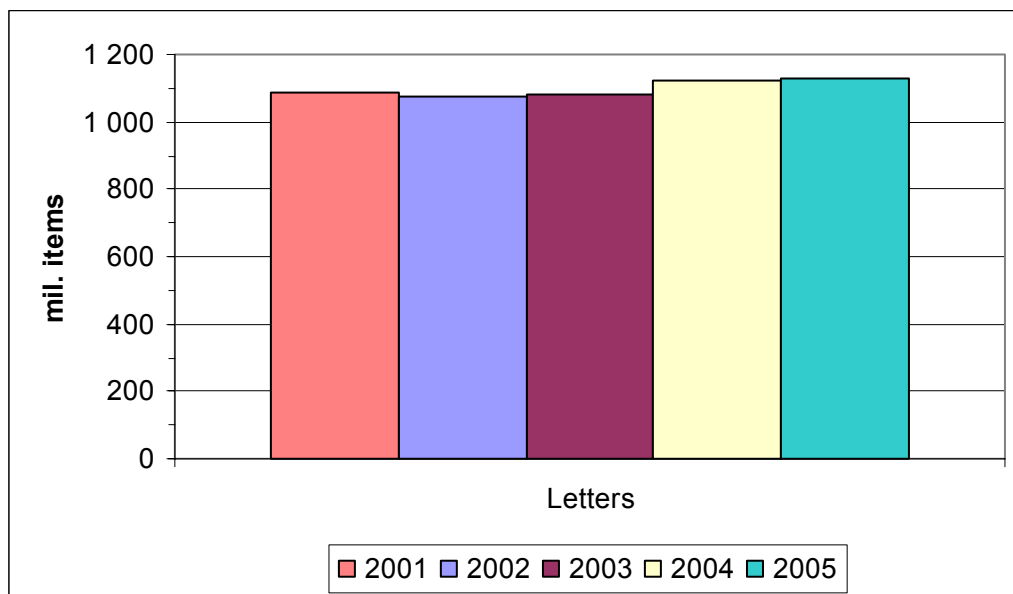


Figure 2. Volume of letters delivered within the universal service in 2001 - 2005.

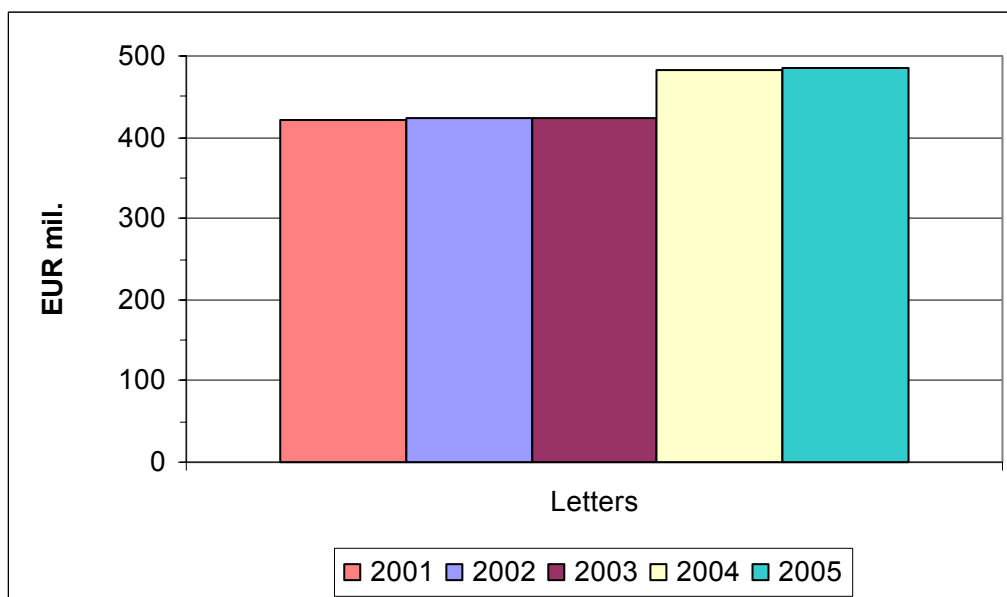


Figure 3. Revenues from letters delivered within the universal service in 2001 - 2005.

#### 4.1.2. Parcels

In 2005 a total of 18 million domestic parcels of under 10 kg within the universal service were delivered, making a turnover of EUR 94 million. The volume of parcels and the turnover from parcel deliveries both grew by 7 per cent from the previous year. Table 4 presents the volume and turnover of domestic parcel deliveries in 2004 and 2005.

Table 4. Volume of parcels delivered within the universal service and revenues from it.

Parcels	2004		2005		change	
	revenues EUR 1000	number 1000 pcs	revenues EUR 1000	number 1000 pcs	revenues %	number %
<b>Total</b>	<b>87 112</b>	<b>16 917</b>	<b>93 580</b>	<b>18 170</b>	<b>7</b>	<b>7</b>

\* the series is not continuous

## *4.2 Quality of postal services*

The data presented here that are relevant to the assessment of the quality of postal services describe the postal services performed by Finland Post Corporation, which is still responsible for such a high proportion of postal services that the information can be regarded as sufficiently representative of the quality of the postal services in general.

The service capacity of Finland Post Corporation is evaluated by measuring the speed of conveyance of letters, newspapers and magazines and parcels and by monitoring how the delivery speed targets are reached. The attainment of delivery targets for 1st and 2nd class letters, magazines and parcels from customer to customer is monitored systematically. The monitoring is carried out by an independent research organisation by means of test deliveries. Newspaper and magazine deliveries are measured with a survey made twice a year jointly with the publishing houses. After the renewal of the parcel service the delivery speed of parcels is also monitored continuously. The delivery of a parcel can be followed during the whole conveyance process by means of registration of despatch codes. Customers can follow the progress of their parcels in almost real time on Finland Post Corporation's website ([www.posti.fi](http://www.posti.fi)).

The service quality for letters was achieved in 2005 by the 95 per cent quality standard required by the Postal Services Act. The results of the delivery speed survey commissioned by Finland Post Corporation from an outside company indicate that 95 per cent of the 1st class letters sent reached the recipient within the time set, i.e. on the following working day, as did 96 per cent of all 2nd class letters by the third working day, which means that for 1st class letters the quality of service was 1 percentage point lower and for 2nd class letters it was the same as in the previous year. In all, 97 per cent of the newspapers and magazines reached their destination within the set time, thus the service quality was unchanged from the previous year.

The Finnish Communications Regulatory Authority ([www.ficora.fi](http://www.ficora.fi)) commissions yearly an impartial auditing required by the standard SFS-EN 13850 on the transit time measurement of 1st class letters delivered by Finland Post Corporation. The audit for the year 2005 showed that the measurement had been performed in the manner and at the accuracy required by the standard.

The transit times of European internal letter deliveries are measured by an external research institute on assignment of the joint enterprise of post operators, the International Post Corporation IPC ([www.ipc.be](http://www.ipc.be)). The number of countries included in the survey increased in 2005 by the addition of the new EU Member States. In 2005 the transit speed of a 1st class letter (J+3) arriving in Finland varied by the country of origin between 66 per cent (Cyprus) and 98 per cent (Sweden, the Netherlands and Denmark). For the deliveries from Finland the corresponding rate ranged between 57 per cent (Cyprus) and 99 per cent (Sweden, Germany and Switzerland). The target level set by the postal directive is 85 per cent.

A customer satisfaction survey for 2005 commissioned by Finland Post Corporation showed that 79 per cent of business customers and 77 per cent of private customers considered postal services at least satisfactory. Compared with 2004, the customer satisfaction index among business customers declined by 5 percentage points and among private customers it improved by 2 percentage points.

In addition to the quality surveys commissioned by Finland Post Corporation, this matter has also been examined by the Ministry of Transport and Communications ([www.mintc.fi](http://www.mintc.fi)), first in 1996. The subsequent surveys were made in 1998, 2000, 2002, 2004 and 2006. The results have been published in the publication series of the Ministry of Transport and Communications. The results of the most recent survey for 2006 pointed to a fairly high assessment for postal services as a whole, i.e. the majority of both consumers (73%) and enterprises (66%) were at least fairly satisfied with these. In the 2004 survey on postal services the corresponding figures were 78 and 84 per cent. The latest survey indicated that 38 per cent of consumers and 47 per cent of enterprises would welcome competition in postal services, feeling that from the users' point of view it would have a favourable impact on the price level, the number of post offices, the choice of products and the general quality of the service provided. The intention is to conduct quality surveys at intervals of two years, the next one being scheduled for 2008.

From the beginning of 2002 with the entry into force of the Postal Services Act, the duties related to the opening of the universal service letters and parcels undelivered by Finland Post Corporation were transferred to the undelivered postal items unit established by the Finnish Communications Regulatory Authority. The address clarification services of Finland Post Corporation are still in charge of matters relating to address clarification.

In 2005 these units handled 439,263 letters and 3,480 parcels. Of letters, 47.5 per cent were destroyed as decreed by the Postal Services Act. A total of 219,987 letters, or 50.1 per cent of the total, were transported to their receiver or sender, as were 23.7 per cent of the parcels. During 2005 the undelivered postal items unit had in storage for six months, as regulated by the act, a total of 10,438 letters and 2,655 parcels and 3,084 individual loose items detached from deliveries waiting to be despatched to the correct receiver or sender through customer inquiries.

## 5 OTHER POSTAL AND SMALL FREIGHT DELIVERIES

Deliveries of mail and small freight items outside the licensed postal services are examined next as a whole. The examination includes domestic deliveries in category 6411 not belonging to the universal service, category 6412, Other delivery and courier services, and a separately defined group of companies in other categories. International mail is viewed as a whole and included is also international mail within the universal service from category 6411.

There is no distinct difference between letter and parcel services in the case of deliveries taking place outside the postal services proper. Often the only basis for classification is weight, so that the boundary between letters and the lightest parcels (up to 2 kg) is an indeterminate one. Category 6412 includes a relatively large number of companies that market or act as agents for distribution services without being engaged in actual deliveries themselves.

In 2005 the volume of domestic deliveries outside the licensed postal services was 2,609 million, generating a turnover of EUR 450 million. The total volume of international mail was 112 million and the turnover from it amounted to EUR 237 million.

### 5.1 Letters

A total of 2.7 million letters were delivered outside the actual postal services in 2005, the turnover from these amounting to EUR 3.5 million. The volume of letters went down by 9 per cent and their turnover by 2 per cent compared with 2004. Letters delivered outside the actual postal services represent letters not belonging to the universal service and other deliveries categorised as letters.

Table 5. Letters handled outside the licensed postal services in 2004 - 2005.

Letters	2004		2005		change	
	revenues EUR 1000	number 1000 pcs	revenues EUR 1000	number 1000 pcs	revenues %	number %
<b>Total</b>	<b>3 558</b>	<b>2 940</b>	<b>3 496</b>	<b>2 672</b>	<b>-2</b>	<b>-9</b>

### 5.2 Parcels

Table 6 shows the number of and turnover from inland parcels carried outside the licensed postal services in 2004 and 2005. Included are thus inland parcels weighing over 10 kg from branch 6411, National post activities. The series for parcel deliveries is not continuous, because a different statistical methodology was used for weight categories of parcels in 2001, 2002 and 2003. This is visible in the figures by the breakdown of parcels into heavier weight categories between 2001 and 2003.

In 2005 a total of 14 million inland parcels were carried by operators outside the postal services, the turnover from these being EUR 128 million. The number of parcels increased

by 1 per cent and the turnover from parcel deliveries grew by 3 per cent from the previous year.

Of the delivered parcels 48 per cent weighed under 10 kg. Deliveries of these parcels made up 43 per cent of the respective turnover. The distribution of parcels into weight categories is presented by volume and revenues in 2001 - 2005 in Figures 4 and 5.

Table 6. Parcels handled outside the licensed postal services.

Parcels	2004		2005		change	
	revenues	number	revenues	number	revenues	number
	EUR 1000	1000 pcs	EUR 1000	1000 pcs	%	%
Less than 10 kg	57 114	7 011	55 259	6 533	-3	-7
10 - 50 kg	67 369	6 544	72 408	7 145	7	9
<b>Total</b>	<b>124 483</b>	<b>13 554</b>	<b>127 667</b>	<b>13 678</b>	<b>3</b>	<b>1</b>

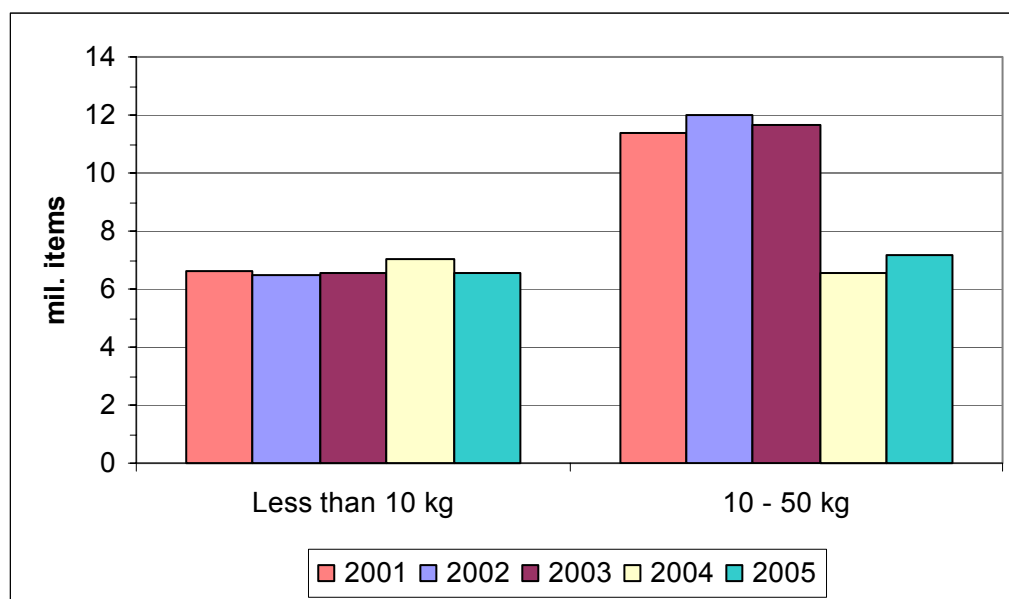


Figure 4. Numbers of parcels handled outside the licensed postal services, by weight category in 2001 - 2005.

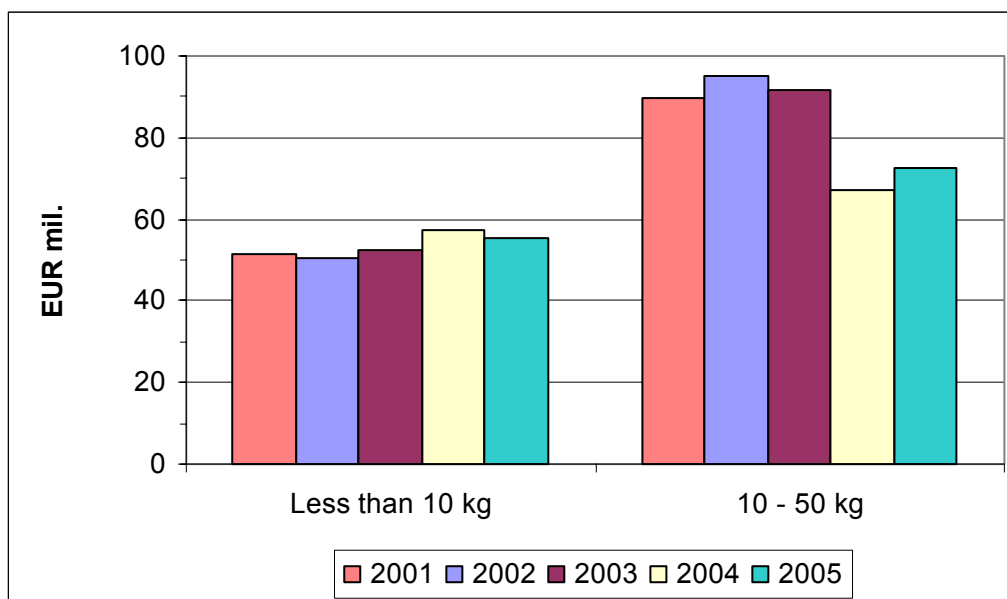


Figure 5. Turnover from parcels handled outside the licensed postal services in 2001 - 2005.

### 5.3 Newspapers and magazines

A total of 1,015 million newspapers and magazines were delivered in 2005 by the enterprises involved in the survey. The turnover from these deliveries amounted to EUR 242 million. The volume of newspaper and magazine deliveries was on level with the previous year, but the turnover from these fell by 3 per cent. Newspapers and magazines were almost entirely delivered in branch 6411, National post activities and in branch 6412, Other delivery and courier services.

In 2005 the volume of morning deliveries of newspapers was 515 million, while 154 million newspapers were delivered during daytime. The volume of newspapers fell by 1 per cent from the previous year. A total of 347 million magazines were delivered in 2005, which was 1 per cent more than in the previous year.

The morning delivery statistics compiled by the Finnish Newspaper Association, discussed in Section 7.1 below, also include some enterprises not belonging to the actual inquiry. These are primarily delivery organisations functioning directly as parts of newspaper and general publishing houses and not as separate companies or establishments. All deliveries made by these organisations belong to the sector Newspaper publishing (TOL 2212) or Newspaper printing (TOL 2221), which means that no comparative turnover data for these operators can be extracted from the Business Register material. The volume of newspapers and magazines delivered by these delivery organisations was around 73 million in 2005, while in 2004 the corresponding figure was 63 million. The figures are not visible in Table 7, because no turnover data are available for these.

Table 7. Volume of and turnover from newspaper and magazine deliveries in 2004 and 2005.

Deliveries	2004		2005		change	
	revenues EUR 1000	number 1000 pcs	revenues EUR 1000	number 1000 pcs	revenues %	number %
<b>Newspapers</b>	<b>170 703</b>	<b>673 123</b>	<b>157 063</b>	<b>668 324</b>	<b>-8</b>	<b>-1</b>
morning delivery	145 748	517 445	131 803	514 524	-10	-1
daytime delivery	24 955	155 678	25 260	153 800	1	-1
<b>Magazines</b>	<b>79 431</b>	<b>343 162</b>	<b>85 239</b>	<b>347 146</b>	<b>7</b>	<b>1</b>
<b>Total</b>	<b>250 134</b>	<b>1 016 285</b>	<b>242 302</b>	<b>1 015 470</b>	<b>-3</b>	<b>0</b>

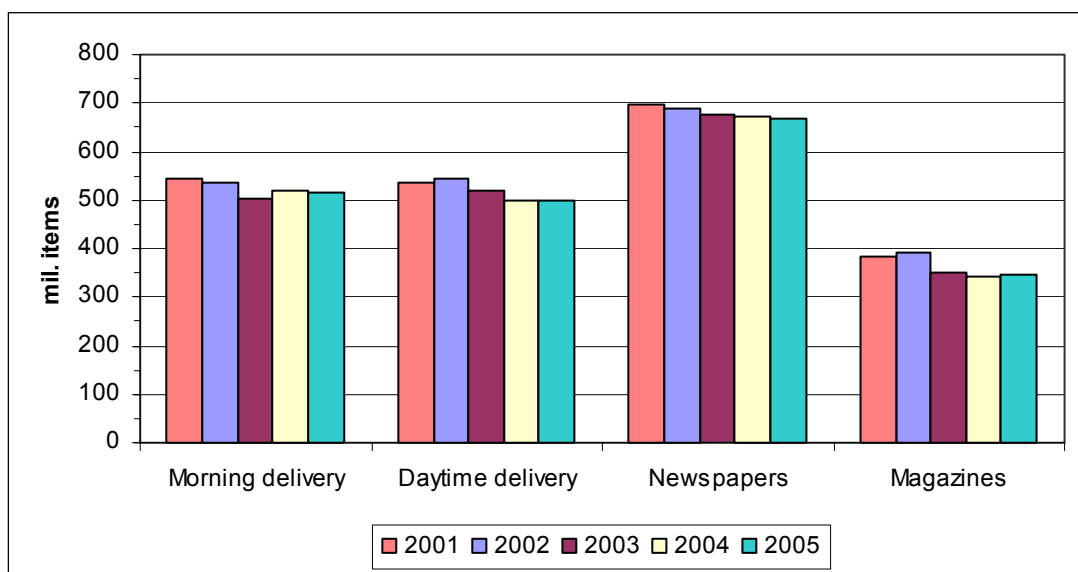


Figure 6. Volume of newspaper and magazine deliveries in 2001 - 2005.

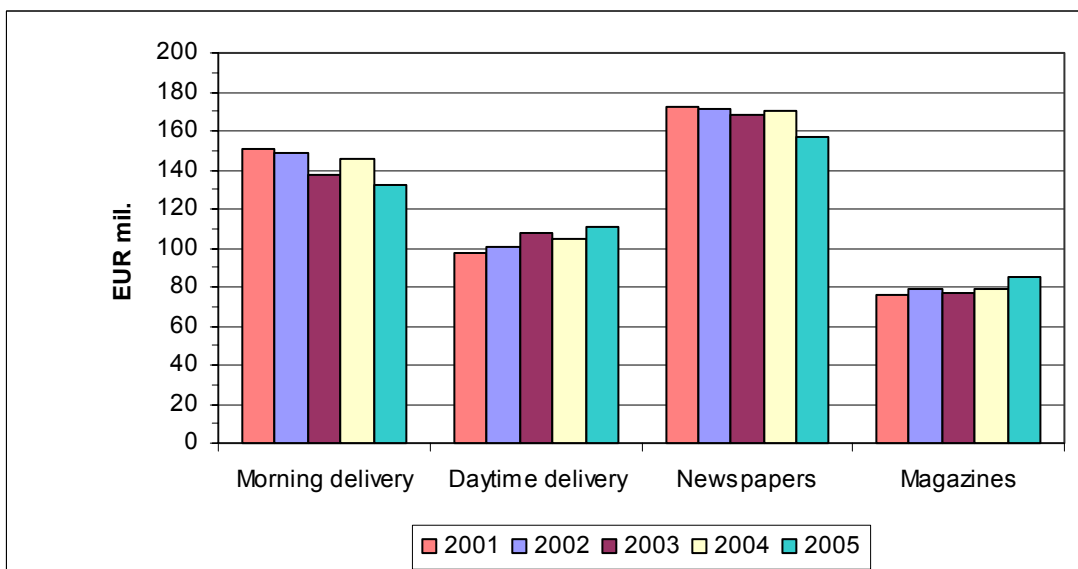


Figure 7. Turnover from newspaper and magazine deliveries in 2001 - 2005.

## 5.4 Unaddressed mail

Table 8. Unaddressed mail in 2004 - 2005.

Unaddressed mail	2004		2005		change	
	revenues	number	revenues	number	revenues	number
	EUR 1000	1000 pcs	EUR 1000	1000 pcs	%	%
<b>Total</b>	<b>62 081</b>	<b>1 346 703</b>	<b>76 668</b>	<b>1 576 803</b>	<b>23</b>	<b>17</b>

In 2005 the total volume of unaddressed mail was 1,577 million and the turnover from these amounted to EUR 77 million. Unaddressed mail increased clearly from the year before; by 17 per cent in volume and by 23 per cent in turnover. In addition to direct mail advertising, unaddressed mail also comprises free advertising newspapers.

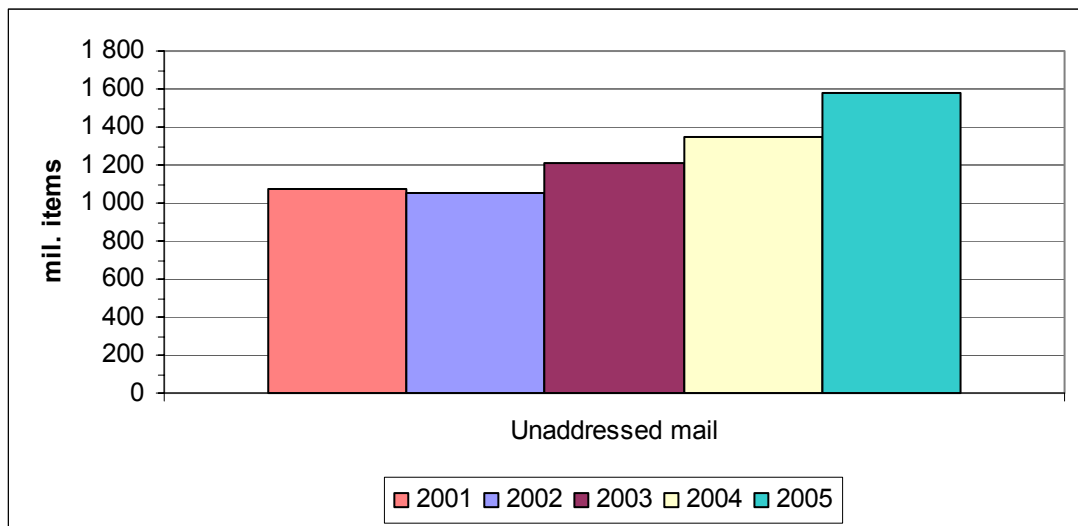


Figure 8. Volume of unaddressed mail in 2001 - 2005.

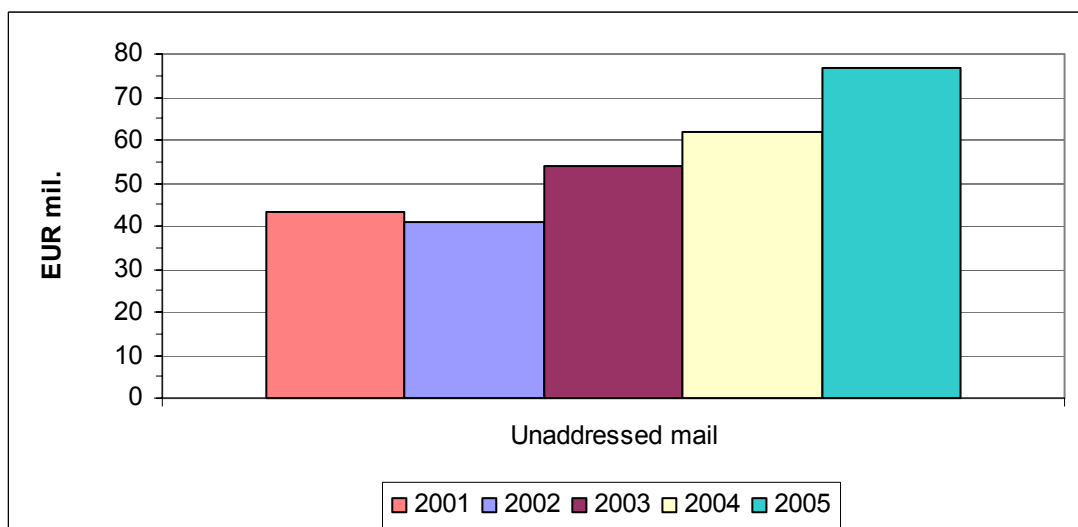


Figure 9. Turnover from unaddressed mail in 2001 - 2005.

### *5.5 International delivery of small freight*

In 2005 the total volume of international mail was 112 million, which was 19 per cent lower than in 2004. The turnover derived from international mail amounted to EUR 237 million, or 8 per cent less than in the year before. The volume of parcels and especially of the group 'other items' declined from the previous year, but the volume of letters increased.

The volume of incoming mail decreased by 20 per cent and that of outgoing mail by 16 per cent. Measured by items, the figures for incoming items were higher than for outgoing ones but the turnover generated from outgoing mail was clearly larger than from incoming mail. This is attributable to the fact that the turnover on outgoing mail also includes the postage payments that have to be credited to the postal services of other countries. The volumes of this traffic in 2004 and 2005 and the revenues obtained from it are indicated by origin or destination in Table 9. The table includes the figures of all international deliveries, also those belonging to the universal service from branch 6411.

Of the incoming items, 74 per cent originated from the EU countries, which in turn received 79 per cent of the outgoing items. In all, 76 per cent of this traffic took place with the EU countries.

In 2005 international incoming or outgoing deliveries of letters totalled 85 million, parcels 7 million and other items 21 million. The turnover from international deliveries of letters produced EUR 67 million, parcels EUR 124 million and other items EUR 45 million.

Table 9. International mail in 2004 - 2005.

International mail	2004		2005		change	
	revenues EUR 1000	number 1000 pcs	revenues EUR 1000	number 1000 pcs	revenues %	number %
<b>Incoming mail, total</b>	<b>90 098</b>	<b>81 851</b>	<b>89 337</b>	<b>65 205</b>	<b>-1</b>	<b>-20</b>
From EU countries	74 190	69 929	66 056	48 225	-11	-31
Letters	24 026	37 400	23 088	42 039	-4	12
Parcels	34 845	4 401	33 453	4 171	-4	-5
Other items	15 319	28 129	9 515	2 016	-38	-93
From non-EU countries	15 908	11 922	23 281	16 980	46	42
Letters	5 133	10 234	10 460	16 281	104	59
Parcels	9 495	288	11 649	477	23	66
Other items	1 280	1 400	1 172	222	-8	-84
<b>Outgoing mail, total</b>	<b>166 817</b>	<b>56 558</b>	<b>147 421</b>	<b>47 236</b>	<b>-12</b>	<b>-16</b>
To EU countries	92 210	36 612	90 641	37 507	-2	2
Letters	25 283	15 317	20 644	22 978	-18	50
Parcels	40 574	2 106	42 709	1 530	5	-27
Other items	26 353	19 189	27 288	12 999	4	-32
To non-EU countries	74 607	19 946	56 780	9 728	-24	-51
Letters	32 741	8 790	13 035	3 353	-60	-62
Parcels	34 476	962	36 364	384	5	-60
Other items	7 390	10 194	7 381	5 991	0	-41
<b>International mail, total</b>	<b>256 915</b>	<b>138 409</b>	<b>236 758</b>	<b>112 440</b>	<b>-8</b>	<b>-19</b>

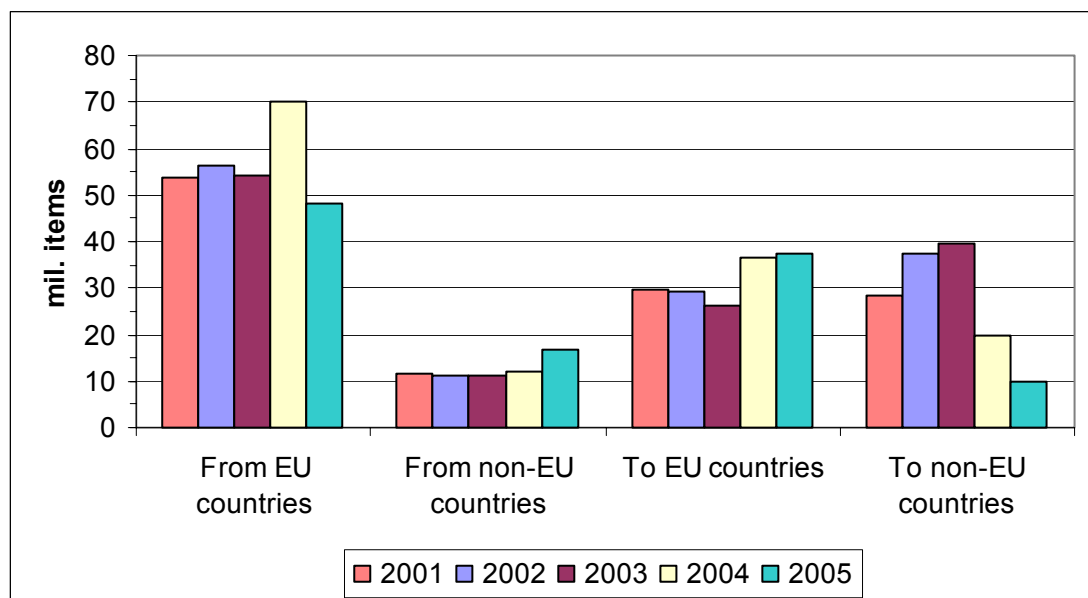


Figure 10. International mail by area of origin and destination in 2001 - 2005.

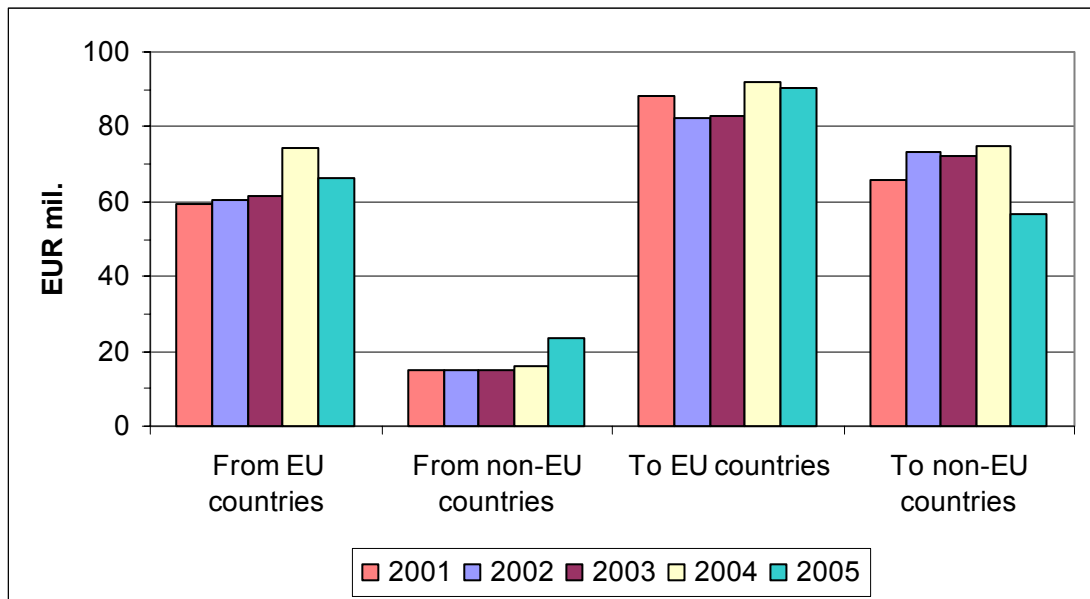


Figure 11. Turnover from international mail by area of origin and destination in 2001 - 2005.

## 6 POSTAL AND COURIER SERVICES AS A WHOLE

The total volume of inland and international mail handled by the postal services and other operators in 2005 amounted to 3,865 million items and the turnover from this to EUR 1,265 million. Compared with the previous year the volume increased by 6 per cent, but the turnover was on level with the year before.

Inland mail totalled 3,753 million items and international mail 112 million, with turnover figures of EUR 1,028 million and EUR 237 million, respectively. Table 10 shows the volumes and revenues of inland mail handled by the universal service and other operators in 2005. International mail is presented in Tables 13 and 14.

Table 10. Inland mail conveyed by the universal service and other operators in 2005, by type of mail.

Type of mail	Universal service		Other delivery and courier services		Total	
	revenues	number	revenues	number	revenues	number
	EUR 1000	1000 pcs	EUR 1000	1000 pcs	EUR 1000	1000 pcs
Letters	484 315	1 125 900	3 496	2 672	487 811	1 128 572
Parcels	93 580	18 170	127 667	13 678	221 247	31 848
Unaddressed mail	0	0	76 668	1 576 803	76 668	1 576 803
Newspapers and magazines	0	0	242 302	1 015 470	242 302	1 015 470
<b>Total</b>	<b>577 895</b>	<b>1 144 070</b>	<b>450 133</b>	<b>2 608 623</b>	<b>1 028 028</b>	<b>3 752 693</b>

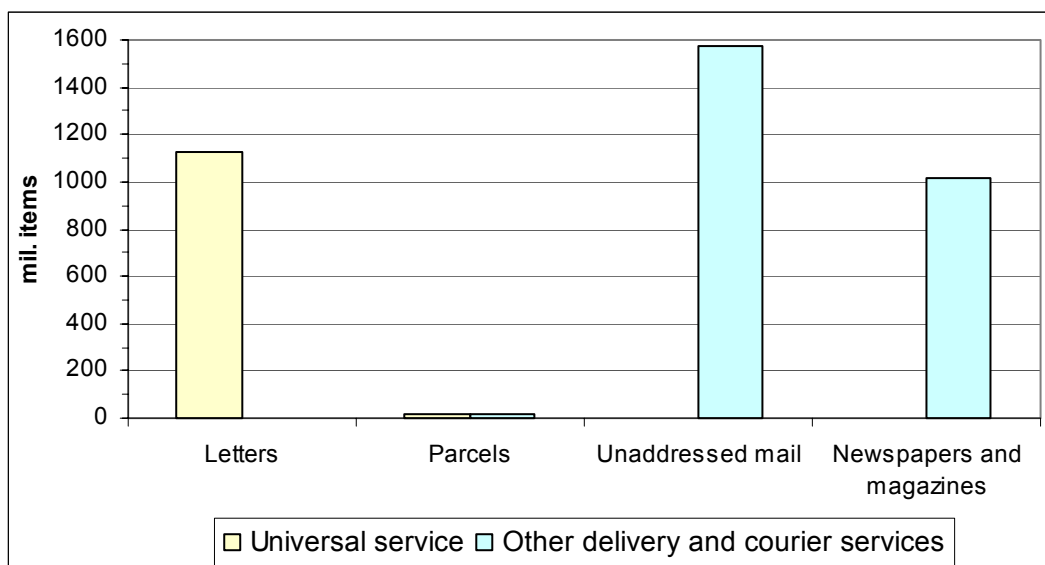


Figure 12. Volumes of inland mail conveyed by the universal service and other operators in 2005, by type of mail.

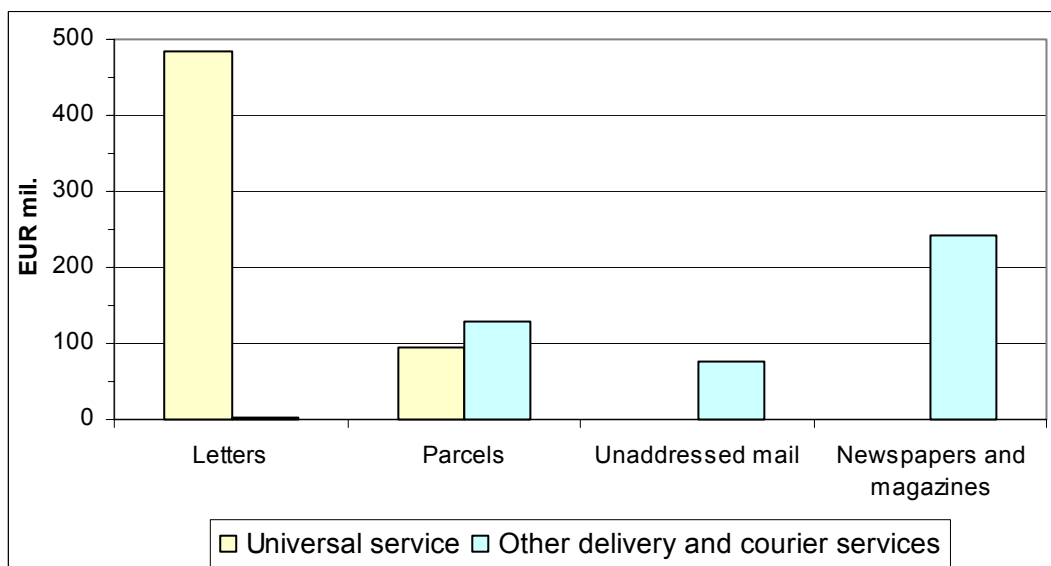


Figure 13. Turnover from inland mail conveyed by the universal service and other operators in 2005, by type of mail.

### 6.1 Letters

The total volume of inland deliveries of letters was 1,129 million in 2005 and the turnover made was EUR 488 million. The volume of letters and the turnover generated was on level with the year before. In all, 2.7 million letters were transported by other operators, which is an extremely small figure compared with the 1,126 million letters delivered within the universal service. It should be noted when comparing these figures that the type denoted as a letter is not specified in any more detail as to the speed or mode of delivery, for example. Furthermore, the boundary between a letter and a parcel is very indeterminate outside the actual postal services.

## 6.2 Parcels

The total volume of inland parcels delivered was 32 million and the turnover was EUR 221 million. Both the volume of parcels and the turnover from them grew by 5 per cent. Of the inland parcels conveyed 18 million or 57 per cent belonged to universal service deliveries. Of the turnover 42 per cent came from parcels delivered in the universal service. A total of 14 million parcels were delivered outside the universal service and the turnover from these amounted to EUR 128 million. Figures 14 and 15 show the volumes of and revenues from parcels handled by the universal service and other operators according to weight category.

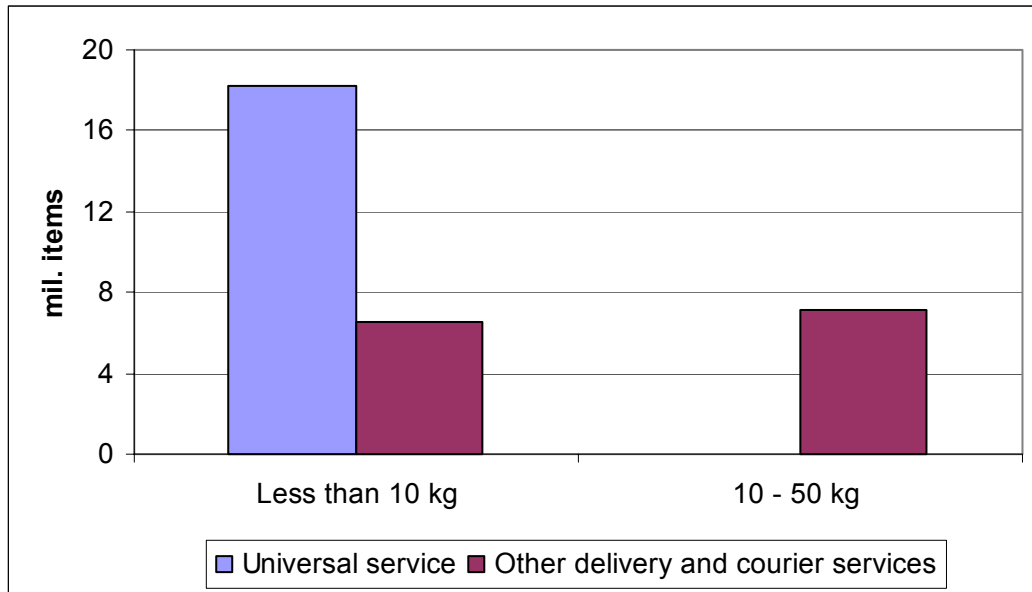


Figure 14. Parcels handled by the universal service and other operators in 2005, by weight category.

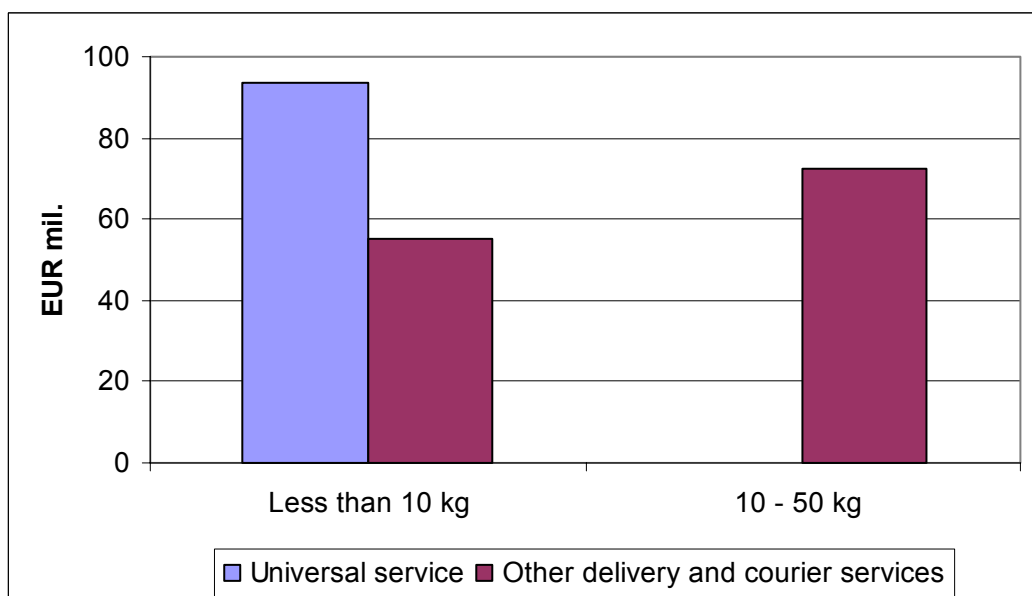


Figure 15. Turnover from parcels handled by the universal service and other operators in 2005, by weight category.

It should be remembered when examining the statistics for parcels that these are not specified here in any more detail as to speed or mode of delivery, for example. Table 11 presents parcels conveyed in Finland in 2004 and 2005.

Table 11. Inland deliveries of parcels as a whole in 2004 - 2005.

Parcels	2004		2005		change	
	revenues	number	revenues	number	revenues	number
	EUR 1000	1000 pcs	EUR 1000	1000 pcs	%	%
Less than 10 kg	144 226	23 928	148 839	24 703	3	3
10 - 50 kg	67 369	6 544	72 408	7 145	7	9
<b>Total</b>	<b>211 595</b>	<b>30 471</b>	<b>221 247</b>	<b>31 848</b>	<b>5</b>	<b>5</b>

### 6.3 Newspapers and magazines

A total of 1,015 million newspapers and magazines were delivered in 2005, which is the same as in 2004. The turnover from this was 3 per cent lower than in the previous year, i.e. EUR 242 million. Examined by branch, 898 million newspapers and magazines were conveyed in branch 6411, National post activities, and 117 million in branch 6412, Other delivery and courier services. Among the newspapers delivered by the postal services (6411), 397 million were morning newspapers. The remaining 498 million newspapers and magazines formed part of the regular daytime postal deliveries of Finland Post Corporation.

Figure 16 shows the volumes of morning deliveries of newspapers in postal services 6411 and in branch 6412, Other delivery and courier services, and the volumes delivered by organisations directly connected with the publishing houses from 2001 to 2005. The changes in industry shares in 2005 are partly due to company restructurings in the branches.

Around 73 million newspapers and magazines delivered in 2005 outside the postal services by organisations connected directly with the publishing houses were not included in Table 10, due to the absence of turnover data. The volume of newspapers and magazines distributed in morning delivery by the distribution organisation of these publishing houses is included in Table 12 and Figure 16. Table 12 presents newspapers by mode of delivery and Figure 16 morning deliveries of newspapers by industry.

Table 12. Delivery channels of newspapers in 2001 - 2005.

Mode of delivery	2001	2002	2003	2004	2005
	mil. items	mil. items	mil. items	mil. items	mil. items
<b>Home delivery</b>	<b>764</b>	<b>751</b>	<b>739</b>	<b>736</b>	<b>741</b>
Morning delivery by regular postal service	269	261	222	238	397
Other morning delivery	341	339	346	343	190
Daytime delivery by regular postal service	154	151	172	155	153
<b>Newspapers sold as single copies*</b>	<b>104</b>	<b>96</b>	<b>94</b>	<b>99</b>	<b>98</b>
<b>Total</b>	<b>868</b>	<b>847</b>	<b>833</b>	<b>835</b>	<b>839</b>

\* Source: Rautakirja Group

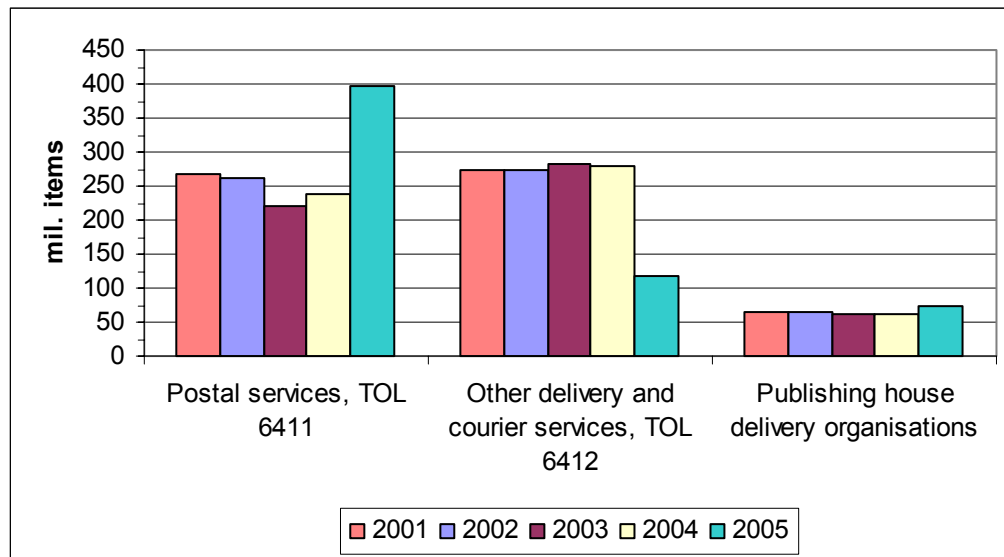


Figure 16. Volumes of morning deliveries of newspapers in 2001 - 2005.

According to the basic data used for producing the newspaper circulation statistics (Section 7.1.2), a total of 742 million copies of newspapers are delivered per year, a result which correlates quite well with the number of newspaper deliveries recorded in the present survey, 741 million. Of these, 551 million were delivered by the actual postal services, 117 million by companies classified into TOL category 6412, and around 73 million by publishing house delivery organisations.

#### 6.4 Unaddressed mail

Unaddressed mail totalled 1,577 million items in 2005, yielding a turnover of EUR 77 million. The volume of unaddressed items was 17 per cent and the turnover 23 per cent higher than in 2004. The volume of and the turnover from unaddressed mail are presented in Table 10.

#### 6.5 International mail

The total volume of international mail handled by the companies considered here amounted to 112 million items in 2005. The turnover from this was EUR 237 million. The volume of international mail decreased by 19 per cent and the turnover from them by 8 per cent. Table 13 shows international mail belonging to the licensed universal service and other operators as a whole.

The majority of international mail was letters, 85 million in 2005. The volume of letters increased from the previous year but the turnover from them declined. The next highest figures were recorded for the group 'other items', whose volume decreased clearly from the year before. The total number of parcels 6.6 million, which is 15 per cent down on 2004. The turnover from parcel deliveries grew by 4 per cent, however.

The turnover derived from parcels was the highest of all, EUR 124 million. The turnover from letters delivered was EUR 67 million and that from other items EUR 45 million. Table

13 and Figures 17 and 18 present the volume of and turnover from international mail by type of mail.

Table 13. Volume of international mail by type of mail in 2004 and 2005.

Type of mail	2004		2005		change	
	revenues	number	revenues	number	revenues	number
	EUR 1000	1000 pcs	EUR 1000	1000 pcs	%	%
Letters	87 183	71 741	67 227	84 650	-23	18
Parcels	119 390	7 757	124 175	6 562	4	-15
Other items	50 342	58 912	45 356	21 228	-10	-64
<b>Total</b>	<b>256 915</b>	<b>138 409</b>	<b>236 758</b>	<b>112 440</b>	<b>-8</b>	<b>-19</b>

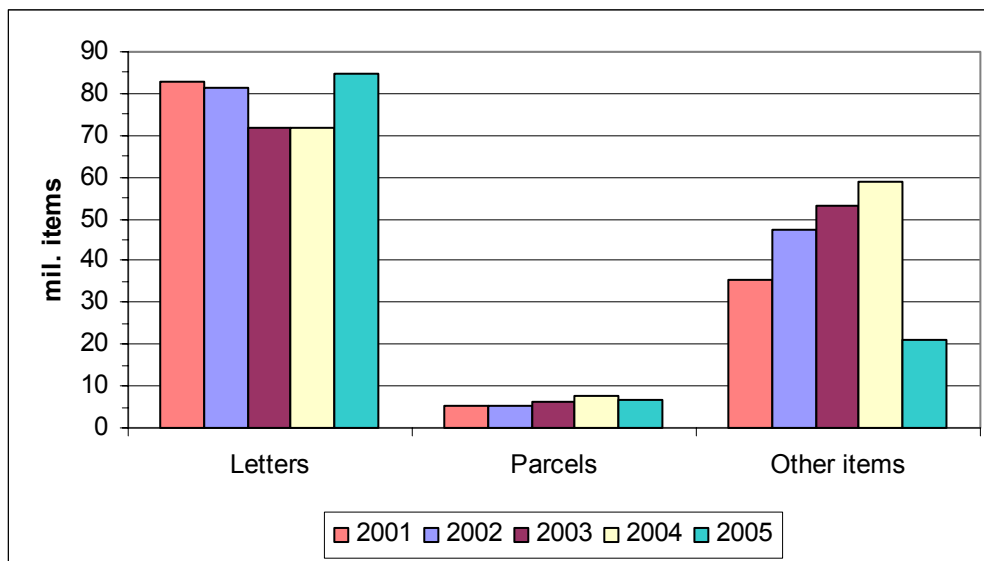


Figure 17. Volume of international mail in 2001 - 2005.

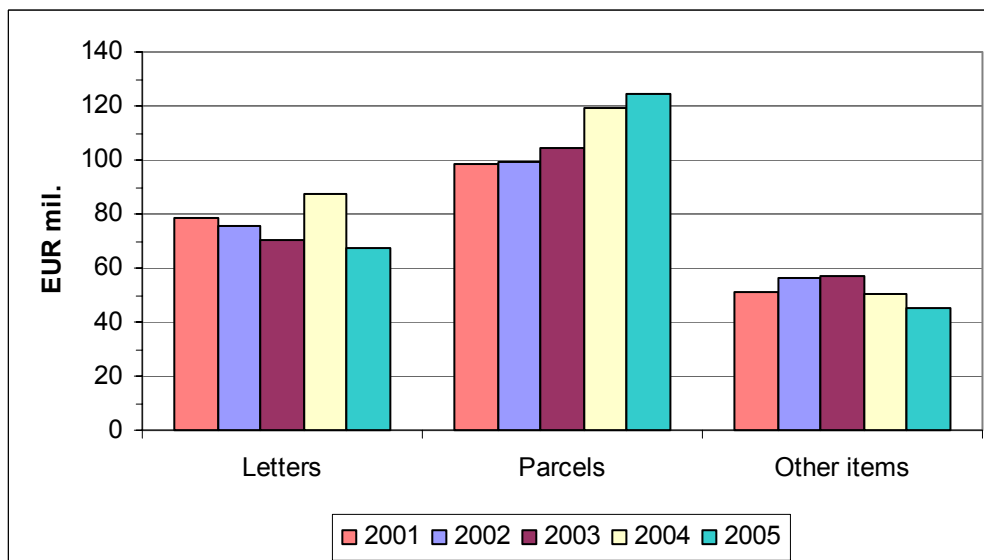


Figure 18. Turnover from international mail in 2001 - 2005.

Examined by branch, the majority of international mail was handled in branch 6411, National post activities. In 2005 only 4 per cent of international mail was delivered outside branch 6411, that is, in branch 6412 and by companies specified for the inquiry. The turnover from operators outside postal services 6411 was 60 per cent, however. Table 14 shows international deliveries in 2005 by postal services 6411 and by other operators. The table also presents the proportion of other operators in the total deliveries of different types of mail and the turnover made from it.

In postal services 6411 the volume of international mail decreased clearly from the previous year, which was due to lower volume of deliveries by the group 'other items'. For enterprises outside postal services 6411 the volume of international mail grew by 13 per cent and the turnover by 11 per cent. Figures 19 and 20 present international deliveries of parcels by the postal services 6411 and by other operators from 2001 to 2005. Outside the postal services, the numbers and turnover of parcel deliveries have grown since 2001. At the same time, the volume of international parcels conveyed by postal services 6411 was in 2002 on level with the previous year, in 2003 the volume of parcels turned upwards and the growth continued in 2004, but in 2005 the number of parcels fell from the year before.

Table 14. International mail in 2005 and shares by industry.

Type of mail	Postal services, 6411		Other operators		proportion	
	revenues	number	revenues	number	revenues	number
	EUR 1000	1000 pcs	EUR 1000	1000 pcs	%	%
Letters	59 861	84 325	7 366	325	11	0
Parcels	22 464	2 649	101 711	3 913	82	60
Other items	12 477	21 113	32 879	115	72	1
<b>Total</b>	<b>94 802</b>	<b>108 087</b>	<b>141 956</b>	<b>4 353</b>	<b>60</b>	<b>4</b>

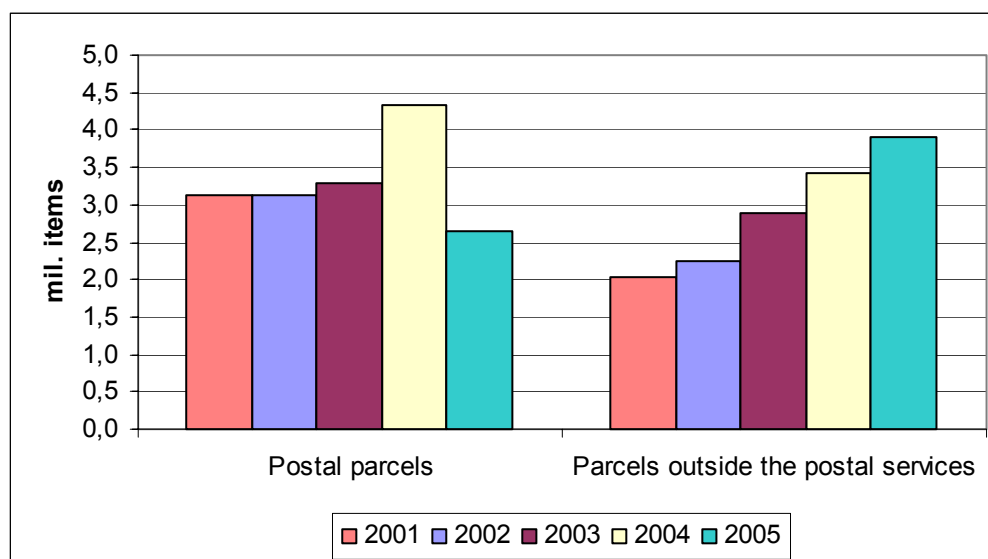


Figure 19. International parcels in postal services 6411 and outside the postal services in 2001 - 2005.

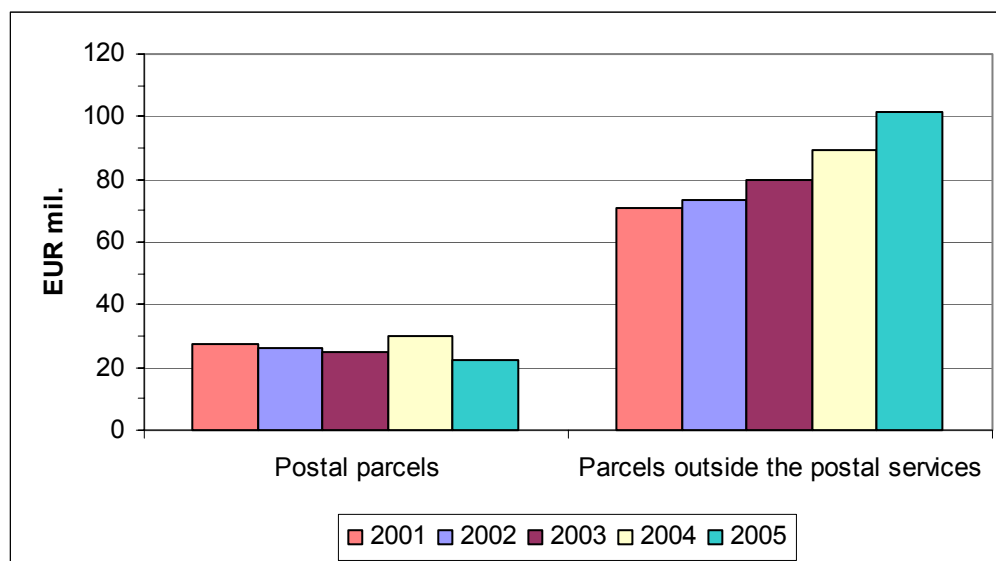


Figure 20. Turnover from international parcels in postal services 6411 and outside the postal services in 2001 - 2005.

## 7 OTHER SOURCES OF INFORMATION

### 7.1 Statistics of the Finnish Newspaper Association

#### 7.1.1 Delivery statistics

Information on the numbers of newspapers delivered is available from the statistics on morning deliveries and transportation and delivery costs maintained by the Finnish Newspaper Association, except that the statistics do not contain newspapers produced by publishers not affiliated to the association which are delivered separately or jointly other than through the postal services. Other channels available include delivery companies, sports clubs, associations and corresponding organisations. Data are also lacking for the numbers of newspapers delivered by companies who did not reply to the questionnaires sent to them by the Finnish Newspaper Association, a figure that tends to vary from one year to another.

A total of 1,600 million copies of newspapers were delivered daily in Finland in 2005, which was 2 per cent higher than in the year before. This means that the gradual falling trend that started in 1999 has turned to growth. The volume of morning deliveries reached its peak in 1993, at 1,676 million a day. Trends in the numbers of morning papers over the past ten years are shown in Figure 21, which is based on the figures reported by the delivery organisations for one particular day. From 1998 onwards the data have been collected on 1 February, while prior to 1998 the date concerned was 1 March. Annual data can be obtained by multiplying these figures by the number of delivery days in each year, which typically varies between 351 and 358.

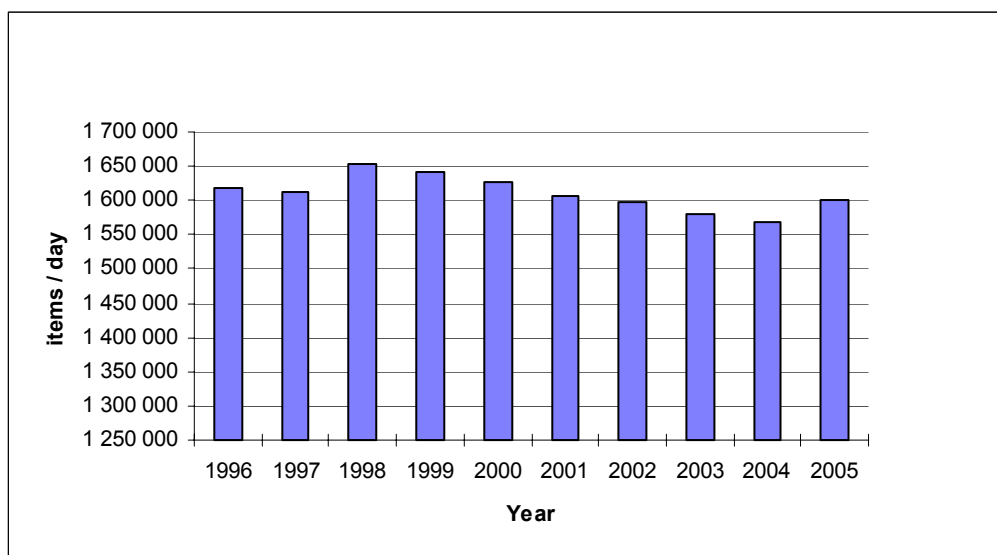


Figure 21. Daily morning deliveries of newspapers in 1996 - 2005.

The modes of delivery employed by the newspaper companies are shown in Table 15, calculated in terms of the number of copies. When examining trends in different modes of delivery, we can see that morning delivery by the regular postal service has increased its share considerably, while joint delivery has lost some of its. No such great variations are visible in other modes of delivery.

Table 15. Modes of delivery of Finnish newspapers to subscribers in 2000 - 2005.

Mode of delivery	2000	2001	2002	2003	2004	2005
	% of total deliveries					
Own delivery	4	4	4	4	5	6
Joint delivery	36	35	34	34	32	19
Morning delivery by regular postal service	46	46	45	45	45	55
Daytime delivery by regular postal service	14	15	17	17	18	20
Total	100	100	100	100	100	100
Newspaper companies replying	59	61	64	59	40	43

Source: VTT statistics on joint deliveries of newspapers.

### 7.1.2 Circulation statistics

According to the official circulation statistics for Finnish newspapers compiled by the Finnish Audit Bureau of Circulations, the combined circulation of all newspapers was 3,173,160 in 2005, which was 1 per cent lower than the year before. Newspapers published 7 to 4 times a week made up 71 per cent of this total and those published 3 to 1 times a week 29 per cent.

The circulation statistics also show that the total number of newspapers delivered or sold as single copies was 840 million in 2005, while in 2004 the corresponding figure was 841 million.

In 2005 the number of domestic papers sold over the counter as single copies was 98.1 million, which was 1 per cent less than in 2004. The number of single copies of international newspapers sold was 0.6 million. Deducting this from the total quoted above, it can be estimated that some 742 million papers were delivered to subscribers in 2005.

## 7.2 Statistics of the Finnish Direct Marketing Association

The statistics compiled by the Finnish Direct Marketing Association contain information on the numbers of addressed and unaddressed mailed advertisements sent out and their costs. These statistics indicate that direct mail advertising in 2005 amounted to 2,067 million items, of which unaddressed circulars made up 1,560 million and addressed mail 507 million. The volume of direct advertising went up by 19 per cent from 2004, which was particularly due to the 25 per cent growth in unaddressed direct advertising. Addressed direct advertising grew by 3 per cent from the previous year. Trends in the volumes of direct advertising in Finland in 2001-2005 are indicated in the figure below.

The statistics include data on addressed direct advertising since 1990 and on unaddressed direct advertising from 1995 onwards. Cost data were not included in the processing of this information, as the present statistics do not otherwise concern themselves with costs but only with the information provided by delivery, production and marketing companies. The delivery figures reported by companies engaged in marketing and supplying the distribution of advertising material cannot be included in the postal and small freight delivery statistics, unless the companies concerned are able to specify the volumes of the material communicated to the companies actually responsible for the deliveries. Thus these figures were not included in the current statistics, on account of the obvious danger of duplication.

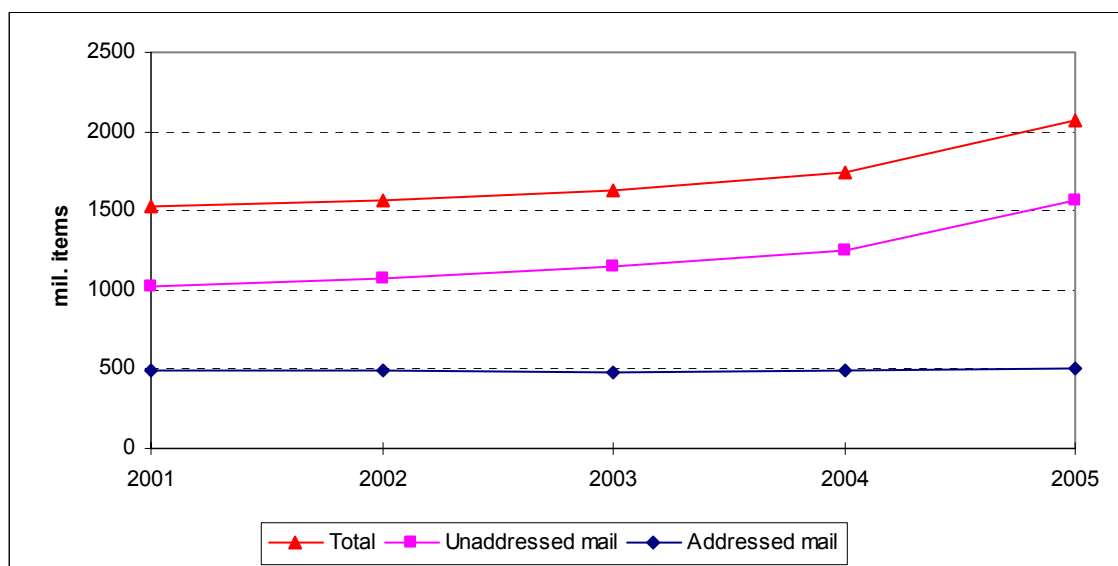
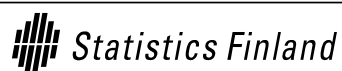


Figure 22. Volumes of direct mail advertising in 2001 - 2005.



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**Confidential**  
Statistics Act 280/2004

## ***Inquiry to postal and small freight delivery companies in 2005***

**NB If you find it difficult to report exact information, please submit an estimate.**

Name of company		Business code	
Address			
Postal code		Post office	
Financial year	____ / ____ 20____ - ____ / ____ 20____	<b>The inquiry concerns the financial year terminating between 1.4.2005 - 31.3.2006.</b>	
Is your company part of an international group?		<input type="checkbox"/> Yes	<input type="checkbox"/> No

### **Distribution of delivery volumes and turnovers**

#### **1. Inland mail**

<b>1.1 Letters, parcels and unaddressed mail</b>	Turnover EUR 1000	Volume 1000
Letters, less than 2 kg, addressed mail		
Parcels, less than 2 kg		
Parcels, 2 - 10 kg		
Parcels, 10 - 20 kg		
Parcels, 20 - 50 kg		
Other unaddressed mail		
<b>Total</b>		

<b><u>1.2 Addressed newspaper and magazine deliveries</u></b>	<b>Morning delivery</b>		<b>Daytime delivery</b>	
	Turnover EUR 1000	Volume 1000	Turnover EUR 1000	Volume 1000
Newspapers and local papers				
Magazines				
<b>Total</b>				

## **2 International postal and small freight delivery services**

<b><u>2.1 Outgoing mail</u></b>	Turnover EUR 1000	Volume 1000
Letters to EU countries		
Letters to non-EU countries		
Parcels to EU countries		
Parcels to non-EU countries		
Other items to EU countries		
Other items to non-EU countries		
Total		

<b><u>2.2 Incoming mail</u></b>	Turnover EUR 1000	Volume 1000
Letters from EU countries		
Letters from non-EU countries		
Parcels from EU countries		
Parcels from non-EU countries		
Other items from EU countries		
Other items from non-EU countries		
Total		

<b>Place and date</b>
<b>Signature</b>
<b>For further information, please contact</b>
<b>E-mail</b>
<b>Telephone</b>