13 September 2010

Viestintävirasto

Postal item service survey 2009

NORDIC ADVISER GROUP

FOREWORD

The Postal item service survey is a statistical publication conducted by the Nordic Adviser Group and published by the Finnish Communications Regulatory Authority (FICORA). The objective of the survey is to examine which were the greatest postal item service providers, the unit volumes of postal item services and turnovers in 2009.

The survey examines the size of the postal item service market, changes to various sub-markets of postal item services or by postal item type, which are letters, parcels, newspapers and parcels, unaddressed mail and international mail. The survey is based on a questionnaire sent to companies offering postal item services. The survey contributes to the monitoring of the postal sector's market development and produces information for the European Commission (Eurostat), the Congress of the Universal Postal Union and other parties in need of information.

FICORA has produced postal statistics (Postal and small freight delivery statistics) together with Statistics Finland since 1998. The postal item service survey 2009 is a continuation for these previous statistics.

Helsinki, September 2010

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Head of Unit, Market Analysis

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1. Summary

In May-June 2010, the Nordic Adviser Group was commissioned by the Finnish Communications Regulatory Authority (FICORA) to implement this survey on postal item services. Postal item services mean the delivery of letters, parcels, newspapers and magazines, unaddressed mail and international mail. The objectives of the survey was to outline the largest operators offering postal item services and examine the volumes of postal item services and the turnover gained from these. The reference period of the survey lasted from 1 January to 31 December 2009.

Statistics Finland, whose latest report is called Postal and Small Freight Statistics 2008, has previously been responsible for a similar survey. The implementation method of this survey is very similar to that of Statistics Finland, because both surveys are based on questionnaires sent to companies. The methods differ somewhat, which should be borne in mind when comparing the results with those from previous years. For example, the sample of the survey is considerably greater for the 2009 survey. The market to be surveyed is the same.

Table 1 portrays the 15 largest companies offering postal item services in Finland measured by reported turnover. The turnover information is based on the most recent financial statement available, either from 2008 or 2009. With the exception of Itella, the greatest companies are mainly foreign delivery and courier services. However, the majority of the turnover of many companies is based on other activities than provision regarded as postal item services. For example, as far as carriers are concerned, all items weighing more than 50 kilos fall outside the focus of this survey. The weight limits of items surveyed are presented in greater detail in the questionnaire in Annex 1.

	Company	Domicile	Turnover (M€)	Year
1	Itella Oyj	Helsinki	1819.7	2009
2	DHL Express Finland Oy	Vantaa	229.6	2008
3	Schenker Cargo Oy	Helsinki	221.9	2008
4	Kaukokiito Oy	Lahti	128.0	2009
5	Transpoint Oy Ab	Helsinki	113.6	2009
6	Oy Kuehne & Nagel Ltd	Vantaa	79.7	2009
7	VR Cargo	Helsinki	72.8	2008
8	TNT Suomi Oy	Vantaa	56.0	2009
9	Matkahuolto Oy Ab	Helsinki	48.7	2009
10	UPS Finland Oy	Vantaa	46.1	2008
11	Posten Åland	Maarianhamina	35.7	2009
12	Janton Jakeluryhmä	Helsinki	31.6	2008
13	Satakunnan kirjateollisuus Oy	Eura	24.8	2009
14	Aamujakelu Oy	Tampere	19.6	2009
15	Posten Logistik SCM Oy (DPD Finland Oy)	Vantaa	14.7	2008

Table 1. Measured by reported turnover, the 15 largest companies providing postal item services in Finland.

The total turnover of the 15 greatest companies providing postal item services in Finland is approximately 3.1 billion euros. Based on the replies, approximately only 1,120 million euros or 36 per cent of the turnover is relevant to this survey. The relevant turnover means business operations pertaining to postal item services consisting of newspaper and magazine delivery, delivery of unaddressed mail, as well as services for sending and delivering letters and parcels weighing less than 50 kilos. Company-specific figures are confidential and will not be reported.

Figure 1 portrays a summary of the total turnover of the postal item service market in Finland in 2009. However, the turnover figure does not include the turnover of outgoing mail from Finland or incoming mail to Finland, because on the basis of the information available, it is not possible to calculate the exact information. The total turnover of international parcels and letters was approximately 180-200 million euros in 2009.

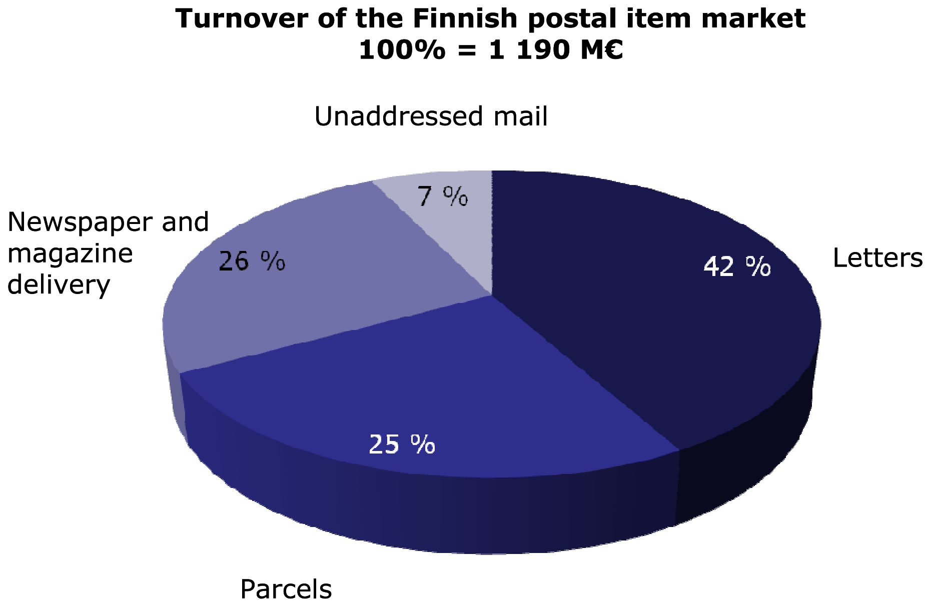

Figure 1: The total turnover of the Finnish postal item market in 2009

Slightly less than 500 million euros or more than 40 per cent of the turnover of the Finnish postal item market consists of letters. In Finland, mainly Itella Oyj and Posten Åland in Åland are responsible for letter delivery. The turnover of parcels and delivery of newspapers and magazines is 300 million for each, which corresponds to a fourth of the entire market. The share of unaddressed mail is approximately seven per cent or 85 million euros.

On the basis of the replies, the calculated volume by postal service type, i.e. letters, parcels, newspapers and magazines as well as unaddressed mail are presented below. Figure 2 shows the volume of the inland letter delivery market, which was estimated to be 1,129 million pieces in 2009 and 1,149 million pieces in 2008. Thus, the volume of letter delivery market would have shrunk by approximately 1.7% from 2008.

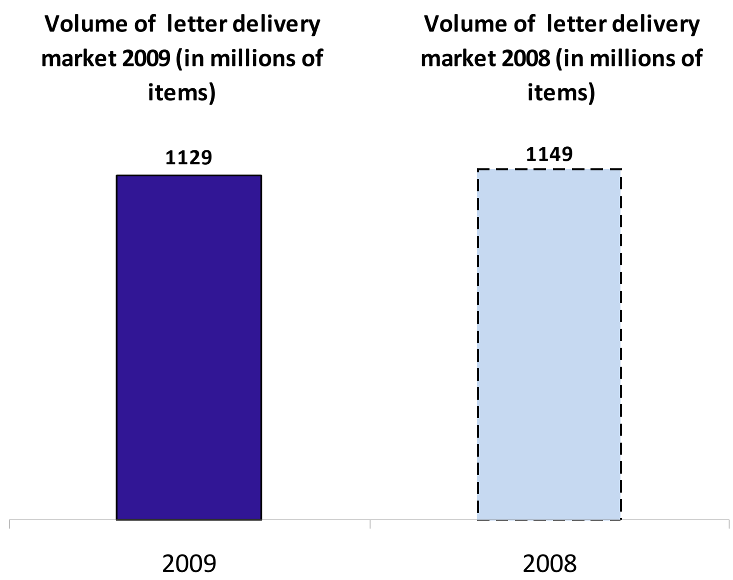

Figure 2: The total volume of the Finnish letter delivery market in 2009 and 2008 (Survey by: 2009 Nordic Adviser Group and 2008 Statistics Finland).

Figure 3 portrays the total volume of the parcel delivery market in 2009, which was approximately 45.3 million items, whereas the corresponding figure in 2008 was 44.4 million items. The total volume of inland and international parcel deliveries grew by less than 2 per cent in 2009 compared to the previous year. However, significant changes took place in the international parcel deliveries as incoming international parcel deliveries grew by nearly a fourth. And, on the other hand, the volume of outgoing international parcel deliveries dropped by nearly a fourth.

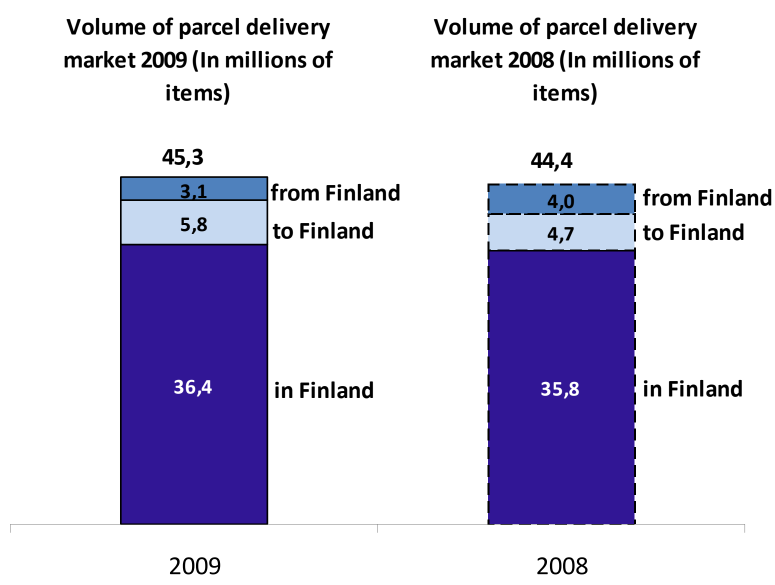

Figure 3: The total volume of the Finnish parcel delivery market in 2009 and 2008 (Survey by: 2009 Nordic Adviser Group and 2008 Statistics Finland).

As shown in Figure 4, the total volume of newspaper and magazine delivery was 1075 million items in 2009, whereas the corresponding figure was 1017 in 2008, and 1016 in 2007. Thus, the total volume of newspaper and magazine delivery grew by 5.7% from

2008. The volume of daytime delivery grew by 5.5% and the volume of morning delivery by 6.2% from 2007. The daytime and morning delivery volumes from 2008 have not been reported. However, daytime delivery also includes the delivery of magazines.

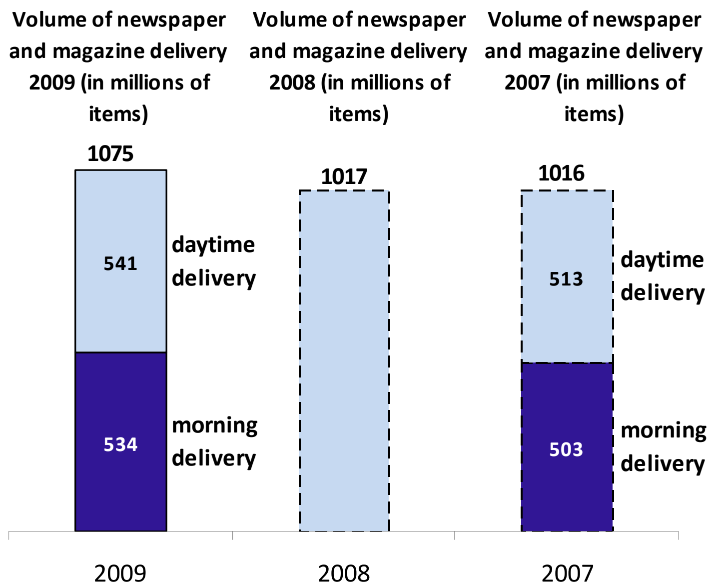

Figure 4: The total volume of newspaper and magazine delivery in 2007–2009 (Survey by: 2009 Nordic Adviser Group and 2007/2008 Statistics Finland).

The total volume of unaddressed mail was 1,861 million items in 2009, whereas the corresponding figure in 2008 was 1,825 million items. Thus, the total volume of unaddressed mail would have grown by approximately two per cent from 2008. This is in line with the survey commissioned by the Finnish Advertising Council, which was implemented by TNS Gallup. According to it, the volume of unaddressed direct marketing grew in 2009 although the share of marketing communication as a whole grew significantly.

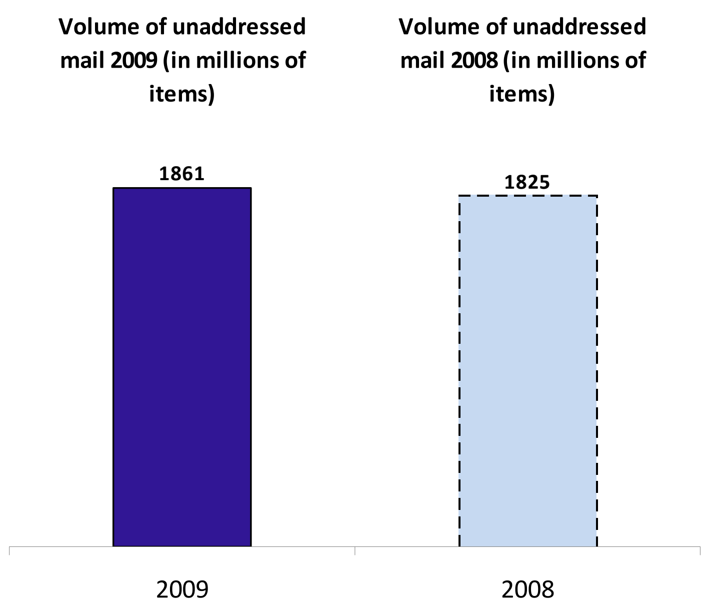

Figure 5: The total volume of unaddressed mail in 2009 and 2008 (Survey by: 2009 Nordic Adviser Group and 2008 Statistics Finland).

Table 2 combines the development of item volumes and turnover from them in 2007-2009 sorted by mail item type. The 2009 figures are based on the survey conducted by Nordic Adviser Group, and the 2007 and the 2008 figures are based on surveys by Statistics Finland. Statistics Finland reported turnover figures from 2008 for parcel delivery only.

<table>
<tr><th></th><th>Volume 2009 (million pcs.)</th><th>Volume 2008 (million pcs.)</th><th>Volume 2007 (million pcs.)</th><th>Turnover 2009 (M€)</th><th>Turnover 2008 (M€)</th><th>Turnover 2007 (M€)</th></tr>
<tr><td>Domestic letters</td><td>1,072</td><td>1,088</td><td>1,078</td><td>497</td><td>N/A</td><td>462</td></tr>
<tr><td>Domestic parcels</td><td>36.4</td><td>35.8</td><td>36.3</td><td>298</td><td>302</td><td>256</td></tr>
<tr><td>Newspapers, morning delivery</td><td>534</td><td rowspan="2">Total 671</td><td>503</td><td>160</td><td>N/A</td><td>139</td></tr>
<tr><td>Newspapers, daytime delivery</td><td>171</td><td>166</td><td>36</td><td>N/A</td><td>33</td></tr>
<tr><td>Magazines</td><td>370</td><td>347</td><td>347</td><td>110</td><td>N/A</td><td>95</td></tr>
<tr><td>Newspapers and magazines, total</td><td>1,075</td><td>1,017</td><td>1,016</td><td>306</td><td>N/A</td><td>268</td></tr>
<tr><td>Unaddressed mail</td><td>1,861</td><td>1,825</td><td>1,746</td><td>85</td><td>N/A</td><td>84</td></tr>
<tr><td>International letters</td><td>57</td><td>61</td><td>62</td><td>N/A</td><td>N/A</td><td>N/A</td></tr>
<tr><td>Incoming international parcels</td><td>5.8</td><td>4.7</td><td>5.3</td><td>65.8</td><td>53.7</td><td>54.5</td></tr>
<tr><td>Outgoing international parcels</td><td>3.1</td><td>4.0</td><td>3.2</td><td>83.7</td><td>97.8</td><td>95.1</td></tr>
<tr><td>International parcels, total</td><td>8.8</td><td>8.7</td><td>8.5</td><td>149.5</td><td>151.5</td><td>149.6</td></tr>
</table>

Table 2. The development of delivery volumes and turnover from them in 2007-2009 sorted by postal item type.

2. RESEARCH METHODOLOGY

2.1 Target group of the survey

The target group of the survey or the group of companies to be surveyed are companies and organisations offering postal delivery services in Finland. The companies to be surveyed are thus all companies offering delivery or conveyance services in one of the following postal item types: letters, parcels, delivery of newspapers and magazines or unaddressed mail. Also, the survey results or volume and turnover information are presented according to the same classification.

In Finland, the only postal operator offering letter delivery as a universal service is Finland Post Corporation under the name Itella Oyj as well as Posten Åland. Itella Oyj is the only operator that provides postal services on mainland Finland as part of universal services, such as delivery of domestic, addressed letters weighing less than 2 kilos. The operating area of Posten Åland is Åland. Both companies have a monopoly in letters in their operating areas. In addition to letters delivered as universal service, the delivery services of letters weighing less than 2 kilos offered by various courier services are regarded as letters for the purposes of this survey.

A large, scattered group of companies provide parcel deliveries in Finland. Itella is the only company with a universal service obligation i.e. the obligation to offer the delivery of parcels weighing less than 10 kilo (less than 30 kilos for incoming international parcels) throughout the country. In addition to Itella, a group of parcel and courier companies belonging to international chains and a large number of smaller Finnish companies offer services for sending parcels and parcel delivery services in Finland.

Itella Oyj and about a dozen delivery organisations owned by newspaper companies are mainly responsible for newspaper and magazine delivery in Finland. Practically Itella runs as the only distributor for daytime newspaper and magazine delivery, whereas distributors representing newspapers are mainly responsible for morning delivery of newspapers in their operating areas.

Unaddressed mail means the delivery of unaddressed direct mail, such as advertising brochures and catalogues and delivery of free papers. In Finland, these services are carried out by Itella Oyj and a group of regional companies. The majority of the regional companies are part of the Janton Oyj delivery group, which operates under the name Suomen Suoramainonta. Also, some delivery organisations owned by newspapers are responsible for the delivery of unaddressed mail.

2.2 Identification of companies

The companies included in the sample group were picked from several sources. In addition to the information on companies collected by the survey conductor in its earlier projects related to the sector, the statistics of the Statistics Finland relating to the postal and courier branch, morning delivery statistics of the Finnish Newspapers Association, a catalogue of newspaper and magazine delivery organisation in Finland published by the Technical Research Centre of Finland, Fonecta's Finder service, corporate websites, the business database of the Trade register and former surveys on the postal and courier sector. This produced a group of 130 largest postal service providers who were sent an electronic questionnaire (list of companies, Annex 2). During the survey, however, a dozen companies were regarded as not belonging to the target group. Approximately

180 small limited companies and partnerships and registered associations fell outside the survey. According to the register of the Statistics Finland, their share of the total turnover in the market was less than 0.3%. These operators focus on delivering parcels and unaddressed postal items.

2.3 Implementation model

The survey was implemented electronically by using Digium Enterprise's software. The contact persons of companies in each target group were sent an e-mail on 31 May 2010 including a cover letter on the survey's objective and a personal link to the internet questionnaire. The questionnaire is presented in Annex 1. The most important part of the questionnaire included questions whose purpose was to examine the item volume and turnover of postal item services in 2009 divided into the four before-mentioned categories. In addition, the questionnaire set out to examine the item volumes of incoming and outgoing international mail, the regional extent of the operators' distribution network and the delivery of items in the distribution networks of other players as well.

The companies chosen for the survey were given a response time of two weeks until 11 June 2010. The aim was to increase the motivation to reply by promising to send all the respondents a survey-based summary of the structure of the sector. During the reply time, companies were also sent two e-mail reminders. Even after this, a phone call was made to companies that had not replied, and the aim was to interview them either on the phone or asking the contact persons to complete the internet survey.

2.4 Response rate

Approximately a third of the surveyed companies replied to the internet questionnaire by the deadline. However, after contacting them by telephone, the number of respondents rose considerably. In all, the companies that had replied to the survey cover 99 per cent of the entire turnover of the inland postal and small freight sector. Table 3 presents the companies' total turnover compared to the survey's total sample by postal item type.

	Respondents' turnover (% of the entire market)	**Number of respondents in relation to the sample**
1. Letters	100%	(10/10)
2. Parcels	98%	(31/89)
3. Newspapers and magazines	100%	(13/13)
4. Unaddressed mail	100%	(33/33)

Table 3. The share of respondents' turnover over the total turnover in the market by postal item type.

In Table 3, the combined number of companies based on postal item type exceeds the before-mentioned 130 companies, because one company can operate under several postal item groups. For example, Itella has been included in all of the postal item types.

The response rate was the highest among newspaper and magazine delivery operators and operators of unaddressed mail. Their response rate was rather restricted and easily-identifiable. The most challenging task was to collect data from parcel delivery companies whose number is great and of which many carry out small-scale parcel delivery in addition to their main business operations. The parcel delivery sector does not either have a common association or coalition that would maintain an extensive register over the sectoral players or compile statistics of operations.

2.5 Validation of replies and filling in missing information

The accuracy of the replies was assessed by comparing the unit prices of various product groups among the respondents. The unclear differences were checked from the respondents. In addition, the results were compared to figures presented in reports and statistics produced by third parties. For example, this was applied to the morning delivery of newspapers, of which the Finnish Newspapers Association has good statistics. In addition, the volume figures of this survey were compared, by category, to those of the Postal and Small Freight Statistics 2008, which is based on the Statistics Finland's figures of the same sectors. Uncertain figures were cross-checked, if possible, with the information that the companies have placed on their websites or published in their annual reports. Finally, the company-specific and combined information was reviewed with FICORA's representatives.

Although the total turnover of companies that replied to the survey covered the majority of the postal item-specific, estimated total turnover, exact information on either the relevant turnover or item volume of certain providers remained unknown. The missing part of the information was estimated case-specifically relying on the information available. Typically, the information was extrapolated to other similar companies by using their replies concerning their average unit prices or shares of turnover. For example, if the parcel delivery company's number of parcels weighing less than 50 kilos was available, but the relevant turnover was not, the estimate of the turnover was based on the average parcel-specific turnover of a similar company. In case the respondent was not able to assess the share of parcels weighing less than 50 kilos over the total number of items it has delivered, the respondent could choose a company whose parcel profile reminded that of the respondent, and the assessment was based on that company's reply.

In the questionnaire, companies were requested to estimate how large a share of the items they deliver pass through the distribution network of Itella or other providers. The information was requested because the share of parallel items could be eliminated when calculating the total volume. Without the elimination, an item that passes through three providers' distribution networks, would appear three times in the total volume. The correction ensures a more reliable picture of the sector's size. The results show that the share of items passing through more than one distribution network is rather significant. For example, more than one thirds of inland parcel items passed through at least two different providers' distribution networks.

3. Volume and turnover in the postal item market

All the results presented in this chapter represent the total market and not only the volumes and turnover of the companies that replied to the survey. The total item volume and turnover have been calculated on the basis of the information received from the companies (130 companies) that replied to the survey. In addition, when the extent of the postal item-specific market was calculated for the parcel market and unaddressed mail, the volumes and turnovers of companies falling outside the sample have been taken into consideration. The turnover information on the postal, delivery and courier sector from the business register of the Statistics Finland has been the source of the assessment. Because the companies that replied to the survey represent such a large share of the total market, the figure should give a rather precise picture of the Finnish postal item market and the volumes and turnover of its sub-sectors.

The results have later been compared to those reported by Statistics Finland in 2007 and 2008. For item volumes, the year of comparison is 2008. However, the majority of the turnover comparisons are based on figures from 2007, because Statistics Finland has not reported turnover figures from 2008 for other sub-sectors than parcel delivery.

3.1. Domestic letters

This section examines the volumes of domestic letters. Based on the replies, it may be difficult to draw a line between letters and parcels, unless the company provides letter or parcel delivery as part of the universal service. According to the Postal Services Act, an item of correspondence is an addressed letter or a postcard not weighing more than two kilos left to be conveyed by a postal undertaking. The majority of foreign courier companies determine their items as parcels, although they would remind of a letter (e.g. a compact disc in a soft envelope). Similar items have also been interpreted as parcels for the purposes of this survey. On the other hand, the share of other providers than Itella and Posten Åland of the letter market is very marginal. Companies' internal postal items delivered by the companies by themselves, are not included in the survey.

Itella Oyj has the universal service obligation to deliver all addressed letters weighing less than 2 kilos to practically all addresses on mainland Finland five times a week. Posten Åland has a similar obligation in the Åland region. In practise, both companies have a monopoly in their operating areas. However, a small group of courier services deliver letters weighing less than 2 kilos, but their volumes are very small compared to those of Itella.

The results of this survey lead to estimate that the volume of inland letter items totalled 1,072 million items in 2009. The figure is based on an estimate, because some players publish the number of letter items as a whole without dividing it into inland and international items. Thus, the volumes for outgoing and incoming international mail are based of the corresponding figures from 2008. A drop of 7 per cent has been taken into consideration (equals to the total volume of 1st class letters).

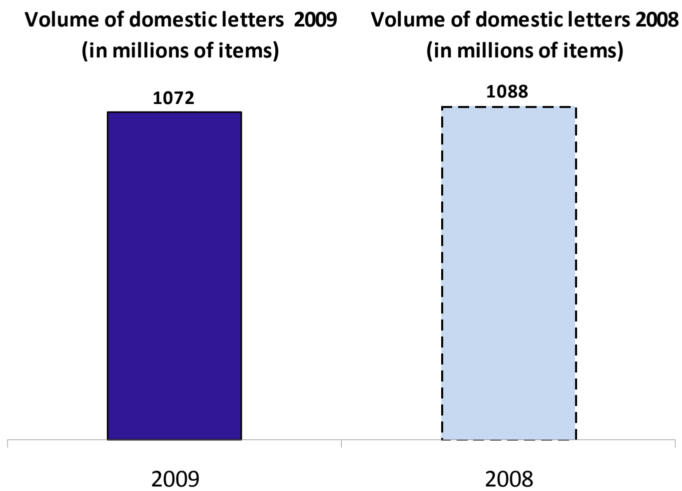

Figure 6: The total volume of the domestic letter delivery market in 2009 and 2008 (Survey by: 2009 Nordic Adviser Group and 2008 Statistics Finland).

The turnover figures for letter items are incomplete in the survey. It is, however, possible to draft a rough estimate of the total turnover of the market by using the 2007 statistics of the Statistics Finland. Then, the turnover per delivered letter was approximately 42.8 cents. By applying the figure, after the price rise, to the 2009 figures, the estimate of the total turnover of letter delivery is 497 million euros (VAT 0%).

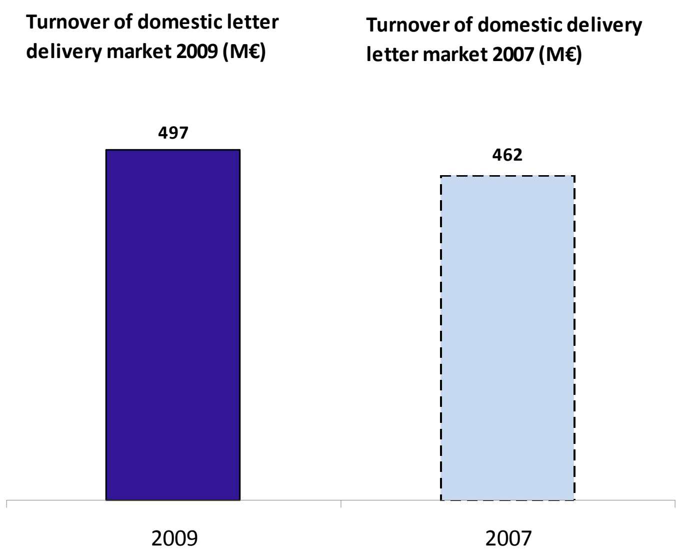

Figure 7: The total turnover of the inland letter delivery market in 2009 and 2007 (Survey by: 2009 Nordic Adviser Group and 2007 Statistics Finland).

Table 4 shows a summary of the development of the volumes of inland letter deliveries and turnover over the past three years.

	Volume 2009 (million pcs.)	**Volume 2008 (million pcs.)**	**Volume 2007 (million pcs.)**	**Turnover 2009 (M€)**	**Turnover 2008 (M€)**	**Turnover 2007 (M€)**
Domestic letters	1,072	1,088	1,078	497	N/A	462

Table 4. The development of domestic letter item delivery volumes and turnover from them in 2007-2009.

3.2. Domestic parcels

This section examines domestic parcel items or parcels sent from Finland to Finland. Based on the replies, it is difficult to draw a line between letters and parcels, unless the company provides letter or parcel delivery as part of the universal service. As stated above, the majority of foreign courier companies determine their items as parcels, although they would remind of a letter (e.g. a compact disc in a soft envelope). Similar items have also been interpreted as parcels for the purposes of this survey. Internal postal items delivered by the companies by themselves, are not included in the survey.

Out of 89 companies providing parcel delivery services, 31 replied to the questionnaire, as shown in Table 3. Although the ratio seems to be low, the 19 largest companies in the sector participated in the questionnaire. The share of the companies that replied represented 98 per cent of the total turnover of parcel items. Table 5 shows the 10 largest companies, based on reported total turnover (not based on turnover of parcel delivery) providing parcel item services in Finland.

	Company	Domicile	Turnover (M€)	Year
1	Itella Oyj	Helsinki	1819.7	2009
2	DHL Express Finland Oy	Vantaa	229.6	2008
3	Schenker Cargo Oy	Helsinki	221.9	2008
4	Kaukokiito Oy	Lahti	128.0	2009
5	Transpoint Oy Ab	Helsinki	113.6	2009
6	Oy Kuehne & Nagel Ltd	Vantaa	79.7	2009
7	VR Cargo	Helsinki	72.8	2008
8	TNT Suomi Oy	Vantaa	56.0	2009
9	Matkahuolto Oy Ab	Helsinki	48.7	2009
10	UPS Finland Oy	Vantaa	46.1	2008

Table 5. The 10 largest companies offering parcel item services in Finland based on reported turnover.

The companies that replied to the survey gave a rather detailed report of the total volume of their parcel items. Instead, all courier companies do not compile statistics of parcel items based on their weight. Neither do they compile separate statistics of domestic postal items or international postal items. Thus, for example, the division of total item volumes of domestic parcels into different weight classes is partly based on estimates. Also, the turnover figures of certain companies are based on estimates.

The estimates mainly follow the principles introduced below. The estimation of turnover figures from individual companies is based on the turnover figures of reference companies (turnover per item) or average prices from respondents. The division of volumes into different weight classes is based on the average weights of parcels received from respondent companies or weight distribution of the control companies' parcels. A reference company mean companies from the same main sector that are as similar as possible with regard to operations and the weight distribution of parcels. The division of parcel volumes into international and domestic parcels follows either the distribution of reference companies or the total volumes the Statistics Finland has compiled statistics of in 2008.

This survey revealed that the volume of domestic parcel items totalled 36.4 million items in 2009. A total of 27.3 million items or 75 per cent of the total volume were parcels weighing less than 10 kilos. Whereas approximately 9.1 million pieces of parcel items weighing less than 10 to 50 kilos were distributed in Finland. The figures are slightly higher than the ones reported by Statistics Finland in 2007. In 2008, Statistics Finland did not collect volume information distributed in weight classes, but the total volume of domestic parcel items was reported as 35.8 million items. In 2009, the growth in the total volume of domestic parcel items was 1.7% from the previous year.

However, the total volume of parcel items reported by the players exceeded 36.4 million pieces, because many of the parcels pass through the distribution network of several players. In order to avoid overlaps, the companies were requested to estimate how large a share of the items they deliver pass through the distribution network of Itella or other provider. Without the information, an item that passes through three providers' distribution networks, would appear three times in the total volume. The correction ensures a more reliable picture of the size of the parcel market. Based on the replies, more than a third of the domestic parcel items pass through the distribution network of at least two different players.

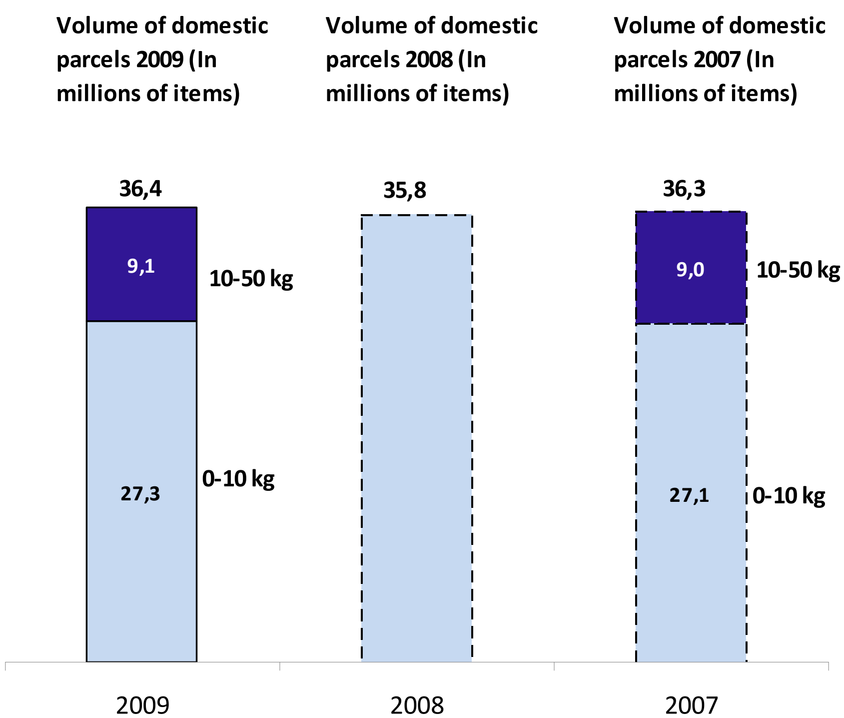

Figure 8: The volumes of domestic parcel item deliveries in 2007–2009 (Survey by: 2009 Nordic Adviser Group and 2007/2008 Statistics Finland).

The turnover from the distribution of 36.4 million parcels was approximately 298 million euros or 8.2 euros per item. The share of parcels weighing 0 to 10 kilos was 192 million euros or less than 65 per cent, although their share of volume items was three fourths. The turnover from parcels weighing less than 10 kilos was approximately seven euros and the turnover from parcels weighing 10 to 50 kilos was approximately 11.6 per item. In 2007, the corresponding figures were approximately 6.1 euros for parcels weighing less than 10 kilos and 10.1 for parcels from 10 to 50 kilos.

Although it seems that the item volumes of parcels have risen by almost two per cent in 2009, the total turnover in the parcel delivery market dropped by 1.3%. In other words, the parcel-specific price dropped slightly from 2008.

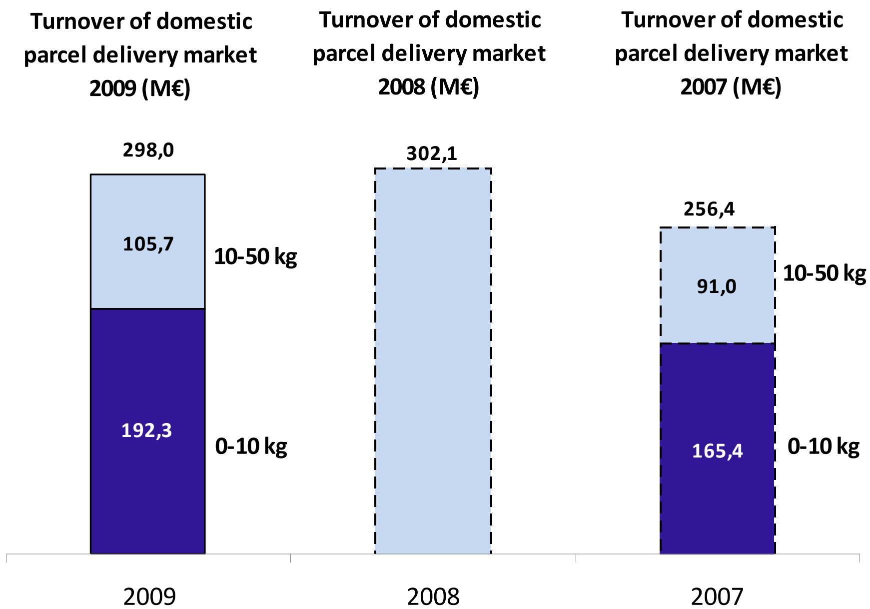

Figure 9: The turnover of the domestic parcel delivery market in 2007–2009 (Survey by: 2009 Nordic Adviser Group and 2007/2008 Statistics Finland).

Table 6 shows a summary of the development of the volumes of domestic parcel item deliveries and turnover over the past three years.

	Volume 2009 (million pcs.)	Volume 2008 (million pcs.)	Volume 2007 (million pcs.)	Turnover 2009 (M€)	Turnover 2008 (M€)	Turnover 2007 (M€)
Domestic parcels	36.4	35.8	36.3	298	302	256

Table 6. The development of domestic parcel item volumes and turnover from them in 2007-2009.

3.3 Newspaper and magazine delivery

Newspaper and magazine delivery can be divided into either newspaper or magazine delivery. Many newspapers, such as Aamulehti, Kaleva, Satakunnan Kansa and Karjalainen, have regional distribution organisations that deliver newspapers in the morning in the core areas of their subscribers. Itella is the only company that has a distribution network of newspapers and magazines that covers the entire Finland. However, Itella does not deliver all newspapers or magazines in the morning, but they are delivered as daytime delivery in sparsely-populated areas. In Åland, morning and daytime delivery is carried out by Posten Åland.

Newspaper and magazine delivery can also be divided into morning delivery and daytime delivery depending on the time of delivery. Newspapers published six or seven times a week are delivered as morning delivery whereas magazines and newspapers published three times a week or less frequently are delivered as daytime delivery. The regional distribution organisations owned by newspapers carry out their delivery almost solely as morning delivery. On the other hand, daytime delivery is nearly completely carried out by Itella, because it delivers letters throughout Finland in any case.

According to the survey, the total volume of newspaper and magazine delivery of respondent companies was 1,075 million items in 2009. Of this, the delivery of newspapers accounted for 705 million items. The greatest distribution organisations of newspapers were Itella Oyj, Aamujakelu Oy owned by Aamulehti, ESA Jakelut Oy owned by Etelä-Suomen Sanomat and Savon Jakelu Oy owned by Keskisuomalainen, which delivers Savon Sanomat, for example.

In 2009, the delivery volume of magazines totalled 370 million pieces. In practice, magazine delivery is nearly completely carried out by Itella in Finland.

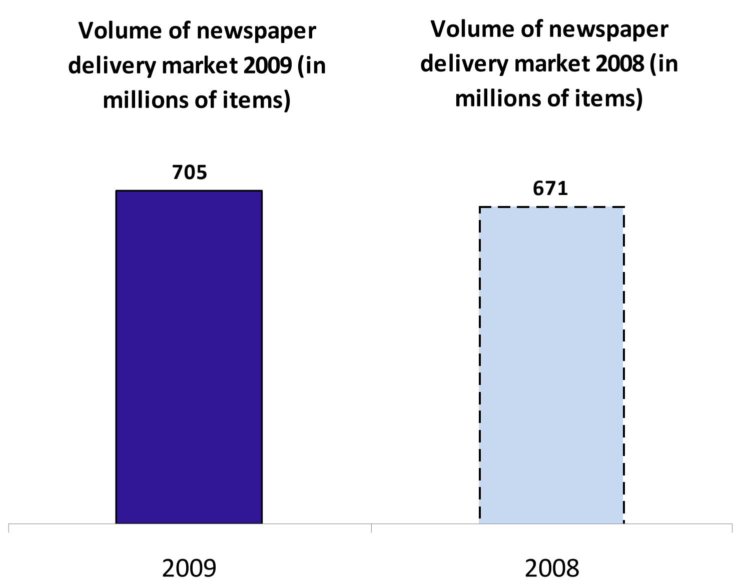

Figure 10: The total volume of newspaper delivery in 2009 and 2008 (Survey by: 2009 Nordic Adviser Group and 2008 Statistics Finland).

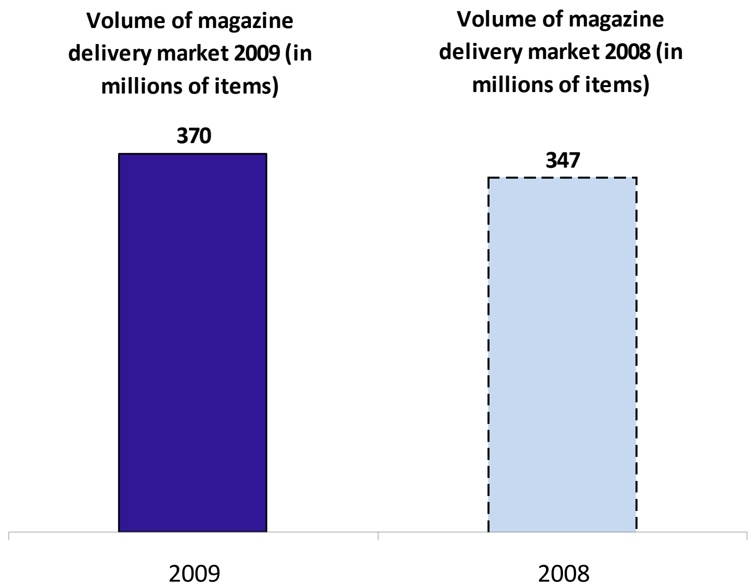

Figure 11: The total volume of magazine delivery in 2009 and 2008 (Survey by: 2009 Nordic Adviser Group and 2008 Statistics Finland).

There is no information available on the distribution of newspaper delivery volumes into morning and daytime delivery. On the basis of the morning delivery statistics of the Finnish Newspaper Association and the Postal and small freight statistics 2007 of Statistics Finland, it is possible to estimate that approximately 76 per cent or more than 530 million newspapers would be delivered as morning delivery. Thus, the rest or approximately 170 million newspapers would be delivered as daytime delivery.

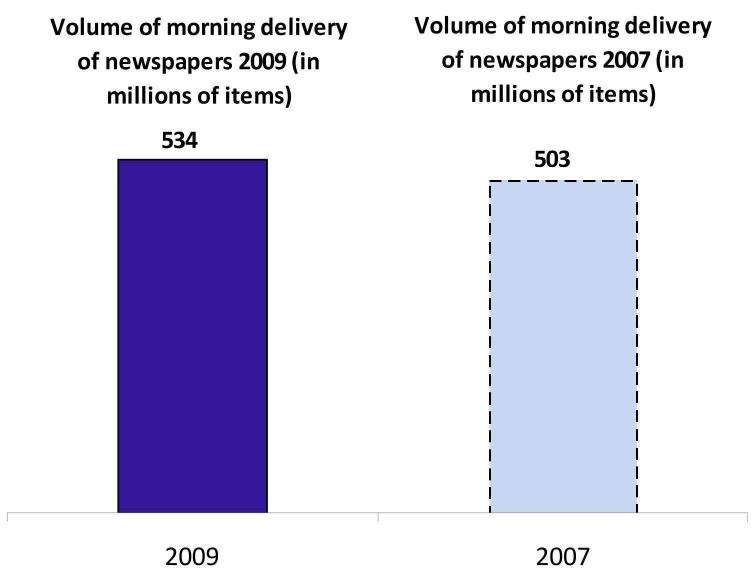

Figure 12: The total volume of morning delivery of newspapers in 2009 and 2007 (Survey by: 2009 Nordic Adviser Group and 2007 Statistics Finland).

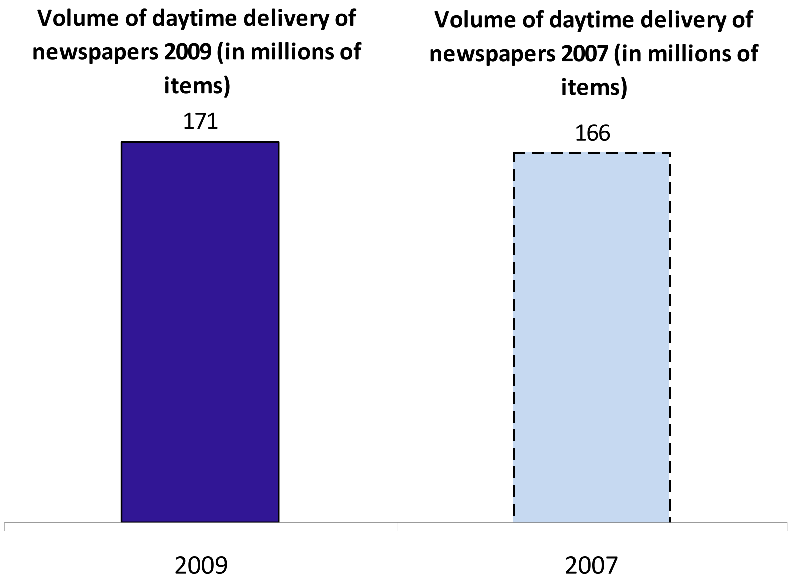

Figure 13: The total volume of daytime delivery of newspapers in 2009 and 2007 (Survey by: 2009 Nordic Adviser Group and 2007 Statistics Finland).

Exact information on the total turnover of newspaper and magazine delivery was not either available, because the replies concerning turnover figures were incomplete. However, it is possible to make a rough estimate of the turnover figures and the size of the newspaper and magazine delivery sector by extrapolating the information given by companies that had reported their turnover by delivery category. The average delivery charge (VAT 0%) of these delivery organisations is approximately about 30 cents per newspaper or magazine. By applying a corresponding, average delivery charge also to companies that had not reported their information, the total turnover of the morning delivery market is approximately 160 million euros.

According to the Postal and small freight statistics 2007 of the Statistics Finland, the unit charge of daytime delivery of newspapers was approximately 20 cents per newspaper, and the unit charge of magazine delivery was 27 cents per magazine. Based on calculations including inflation corrections, the size of the newspaper daytime delivery market is estimated to be 36 million euros, and the size of the magazine delivery market is approximately 110 million euros. These assessments point to that the size of the entire newspaper and magazine delivery market would be approximately 306 euros. The figure is 14 per cent greater than the total turnover reported by Statistics Finland in 2007.

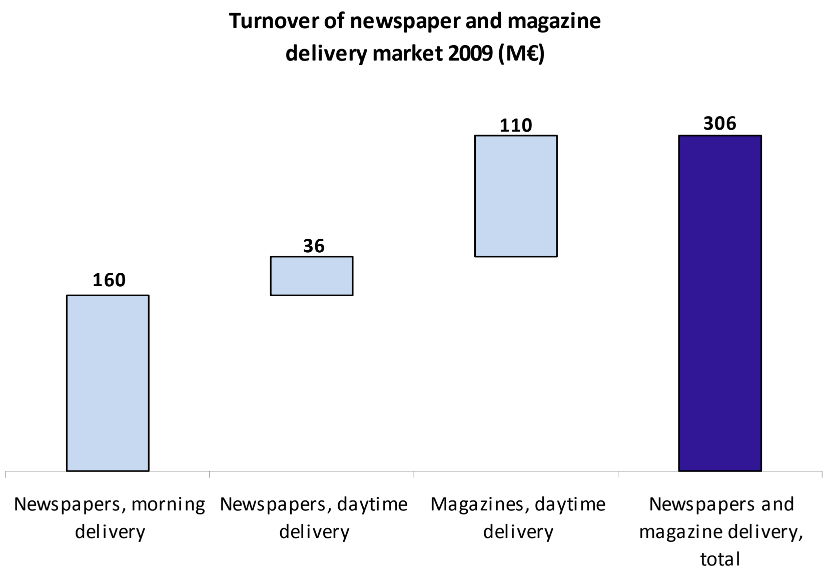

Figure 14: The turnover of newspaper and magazine delivery in 2009 (Nordic Adviser Group).

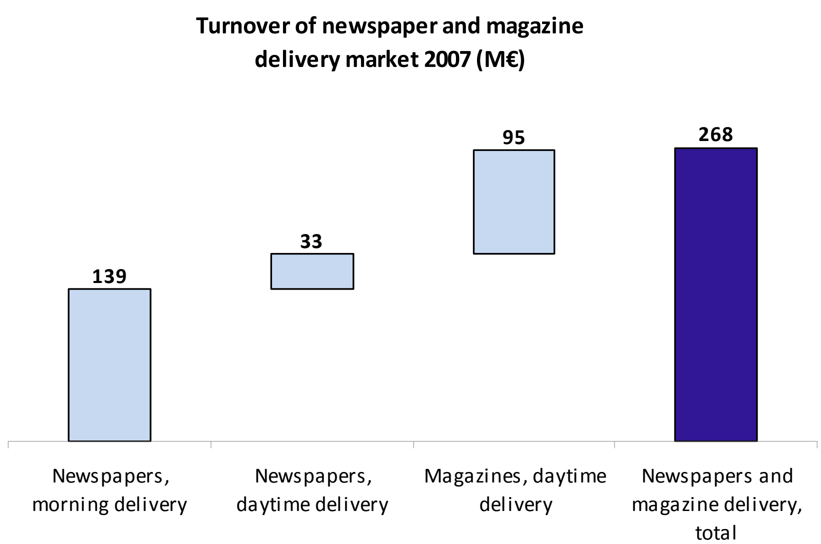

Figure 15: The turnover of newspaper and magazine delivery in 2007 (Nordic Adviser Group).

Table 7 shows a summary of the development of the volumes of newspaper and magazine deliveries and turnover over the past three years.

<table>
<tr><th></th><th>Volume 2009 (million pcs.)</th><th>Volume 2008 (million pcs.)</th><th>Volume 2007 (million pcs.)</th><th>Turnover 2009 (M€)</th><th>Turnover 2008 (M€)</th><th>Turnover 2007 (M€)</th></tr>
<tr><td>Newspapers, morning delivery</td><td>534</td><td rowspan="2">Total 671</td><td>503</td><td>160</td><td>N/A</td><td>139</td></tr>
<tr><td>Newspapers, daytime</td><td>171</td><td>166</td><td>36</td><td>N/A</td><td>33</td></tr>
</table>

delivery						
Magazines	370	347	347	110	N/A	95
Newspapers and magazines, total	1,075	1,017	1,016	306	N/A	268

Table 7. The development of volumes and turnovers from newspaper and magazine delivery in 2007-2009.

3.4 Unaddressed mail

Unaddressed mail means the delivery of unaddressed direct mail, such as advertising brochures and catalogues and delivery of free papers. In Finland, there are two major operators in the field of unaddressed mail: Itella Oyj and a group of companies (SSM Jakeluryhmä) operating under the name Suomen Suoramainonta. Itella carries out the delivery of unaddressed mail in context with nationwide letter delivery, and SSM jakeluryhmä is formed of a group of regional companies that carry out the delivery of city newspapers and advertisements in their distribution areas. The majority of the companies in the SSM Jakeluryhmä are owned by Janton Oyj. A total of 52 regional companies from all over Finland, e.g. Greater Helsinki area, Tampere, Turku, Jyväskylä and Lahti, belong to the group. Also, some newspaper-owned distribution organisations deliver unaddressed advertisements in context with the morning delivery of newspapers.

Also, registered associations, such as sports clubs, and partnership-based companies deliver unaddressed mail in Finland. Because there is little information available on these players, and because their share of the market is very small, these players have been left out of the survey.

In 2009, the item volume of unaddressed mail delivered by companies that participated in the survey amounted to 1,861 million items. The share of companies belonging to Itella and SSM Jakeluryhmä was 97 per cent.

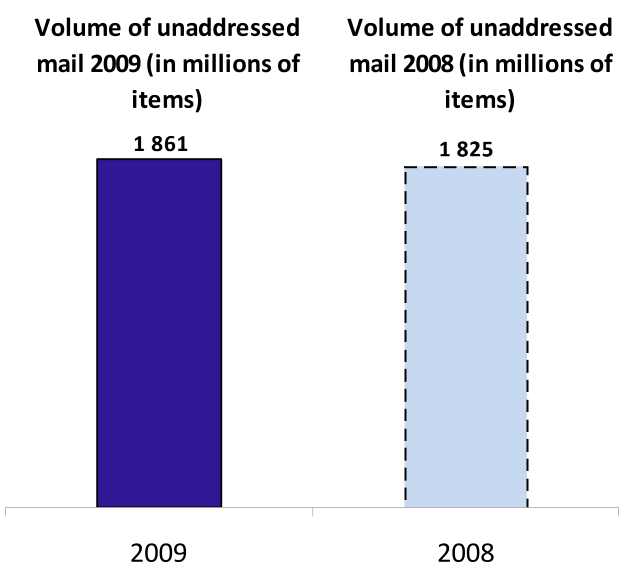

Figure 16: The total volume of unaddressed mail in 2009 and 2008 (Survey by: 2009 Nordic Adviser Group and 2008 Statistics Finland).

It is not possible to determine the monetary value of the unaddressed mail market in euros, because the replies concerning the turnover figures to the survey were incomplete. It is, however, possible to calculate a rough estimate of the monetary value of the market in euros, by extrapolating the average distribution charge (VAT 0%) of the players carrying out unaddressed mail, and who had submitted turnover information. According to this method, the market is valued at more than 85 million euros. The outcome seems to be in line with the total turnover of 83.5 million euros reported by Statistics Finland in 2007.

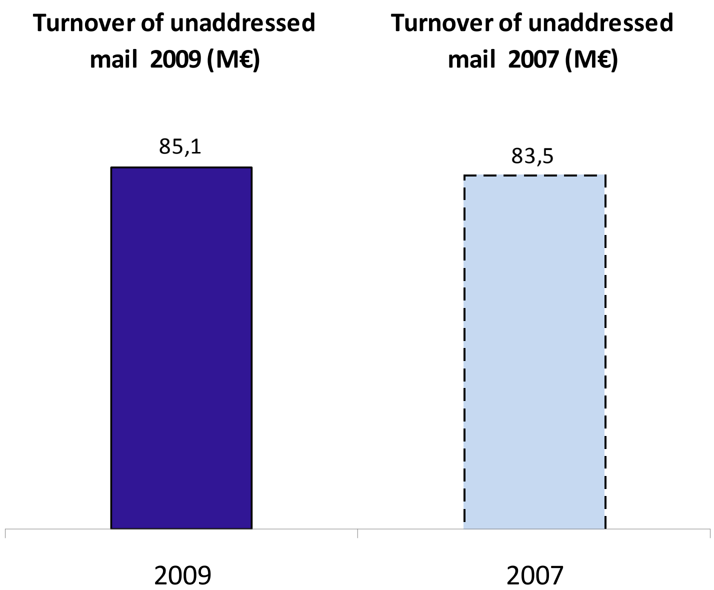

Figure 17: The turnover of the unaddressed mail delivery market in 2009 and 2007 (Survey by: 2009 Nordic Adviser Group and 2007 Statistics Finland).

Table 8 shows a summary of the development of the volumes of unaddressed mail delivery and turnover over the past three years.

	Volume 2009 (million pcs.)	Volume 2008 (million pcs.)	Volume 2007 (million pcs.)	Turnover 2009 (M€)	Turnover 2008 (M€)	Turnover 2007 (M€)
Unaddressed mail	1,861	1,825	1,746	85	N/A	84

Table 8. The development of unaddressed mail delivery volumes and turnover from them in 2007-2009.

3.5 International deliveries

On the one hand, international mail is divided into incoming and outgoing items and on the other hand into letters and parcels. First, this survey examines letters.

All players do not publish information on the division of their letter volume into domestic and international items, but report the total volume. Therefore, it is estimated that the share of international items of such companies has dropped by 7 per cent in 2009 (equals to the total volume of 1st class letters). The estimate is based on total figures published in 2008.

Thus, the outcome of this method brings the total number of international letters to 57.4 million items in 2009. Approximately 20 million of these items were sent abroad and 37 million from abroad to Finland. It is not possible to give an accurate estimate of the turnover from international letters due to the lack of relevant information.

Figure 18: The total volume of international letters in 2009 and 2008 (Survey by: 2009 Nordic Adviser Group and 2008 Statistics Finland).

Concerning international parcels, this survey will examine incoming international parcels. An estimate of the volume of incoming parcels is based on the distribution information received from players. In case it has not been possible to estimate the item volumes on the basis of the information given by reference companies, the estimates are based on the shares presented in Statistics Finland's Postal and small freight delivery statistics. According to the estimate, the number of incoming parcels was 5.79 million in 2009, which means a growth of nearly a fourth from 2008. The difference is significant, and a natural cause for this could be the growth of internet sales.

The total volume has further been divided into incoming parcels from non-EU countries and from the EU, but the division is based on a rough estimate. According to the estimate, the share of parcels from non-EU countries forms a little below 10 per cent of the total volume of incoming parcels.

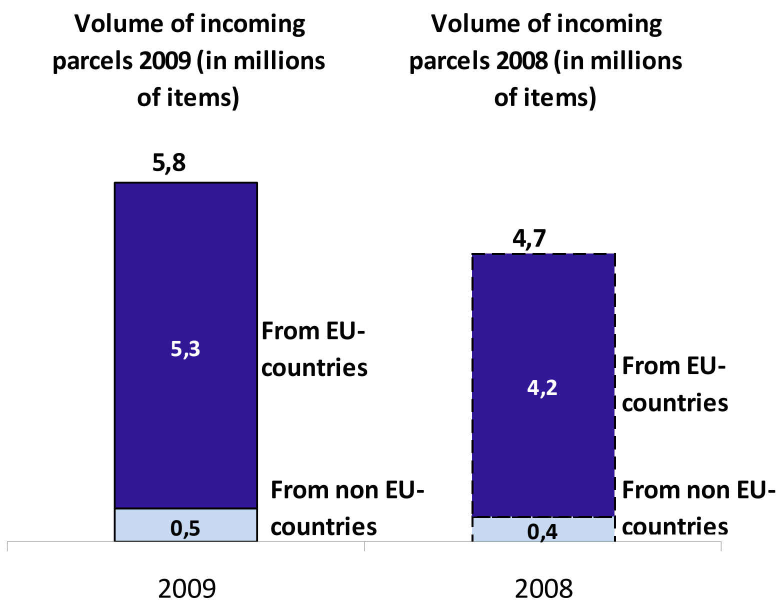

Figure 19: The total volume of incoming parcels in 2009 and 2008 (Survey by: 2009 Nordic Adviser Group and 2008 Statistics Finland).

The turnover from incoming parcels was 66 million euros. This figure has also grown by 20 per cent from the year before. The share of incoming parcels from non-EU countries was 22 million euros or approximately one thirds, although their share of the item volume was one tenths only. The item-specific turnover of incoming items from outside the EU was approximately 40 euros, whereas it was 8.3 euros or one fifths of that for items from EU countries.

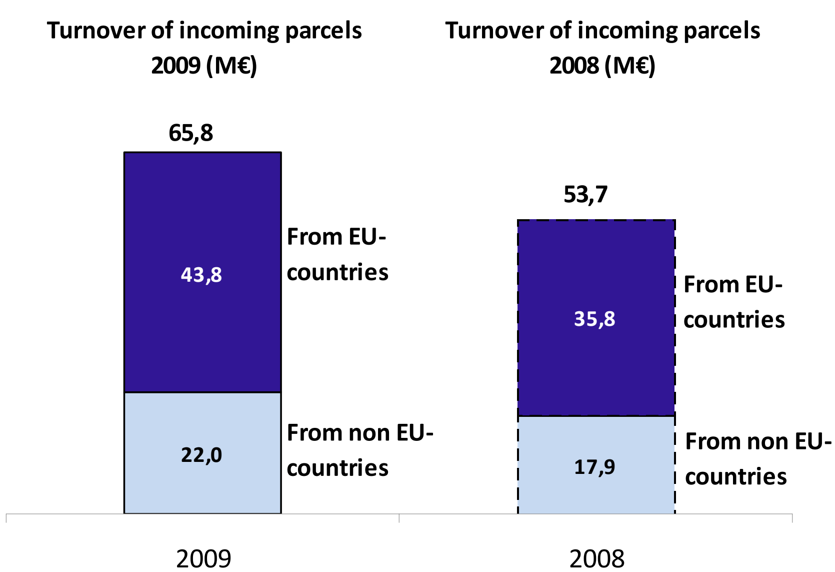

Figure 20: The total volume of incoming parcel market in 2009 and 2008 (Survey by: 2009 Nordic Adviser Group and 2008 Statistics Finland).

Respectively, the total volume of outgoing parcel items was 3.05 million items in 2009. This figure has, on the other hand, decreased by approximately a fourth from 2008. The recession might explain the significant drop, which may have had an impact on the number of outgoing items. The growth in internet sales is not likely to affect much the number of outgoing mail. According to an estimate, the share of parcels sent to non-EU countries was approximately 0.29 million, which accounts for 10% of the total volume of outgoing parcels.

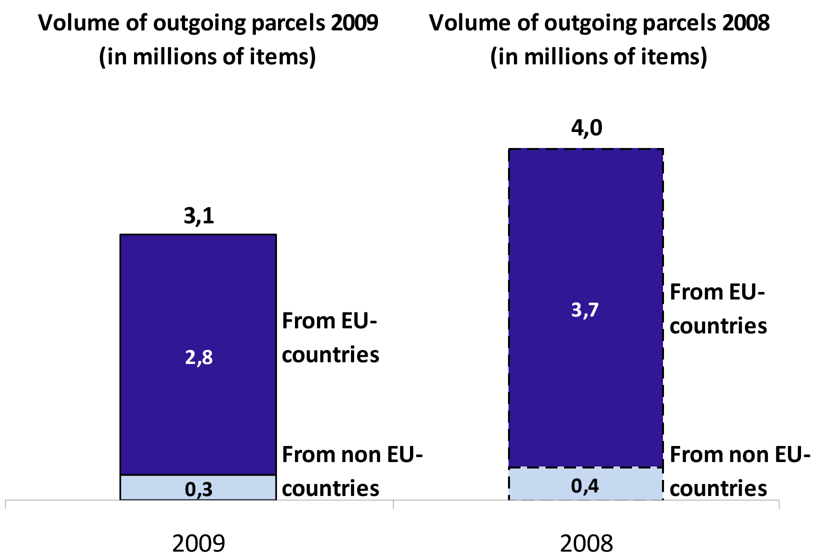

Figure 21: The total volume of outgoing parcels in 2009 and 2008 (Survey by: 2009 Nordic Adviser Group and 2008 Statistics Finland).

Based on the players' replies, the turnover from outgoing parcels was 84 million euros. In other words, that is approximately 27% more than incoming parcels, although the item volume was only 53% of the volume of incoming items. The difference can be explained by the fact that part of the turnover from incoming parcels would be registered under foreign subsidiaries instead of Finnish companies, and therefore Finnish companies would not report it. On the other hand, the difference can partly be explained by the slightly higher price level of outgoing parcels. A similar result can be seen in the Postal and small freight delivery statistics 2008, a survey compiled by Statistics Finland.

The share of parcels sent to non-EU countries was 23 million euros or nearly a fourth of the total turnover, although their share of the item volume was less than one tenth. This corresponds to the results for incoming parcels. The item-specific turnover of parcels sent to non-EU countries was approximately 80 euros, whereas its was about 20 euros for those sent to EU countries. Even though the average price of parcels sent to non-EU countries seems high, the figure is in line with the figures reported earlier by Statistics Finland.

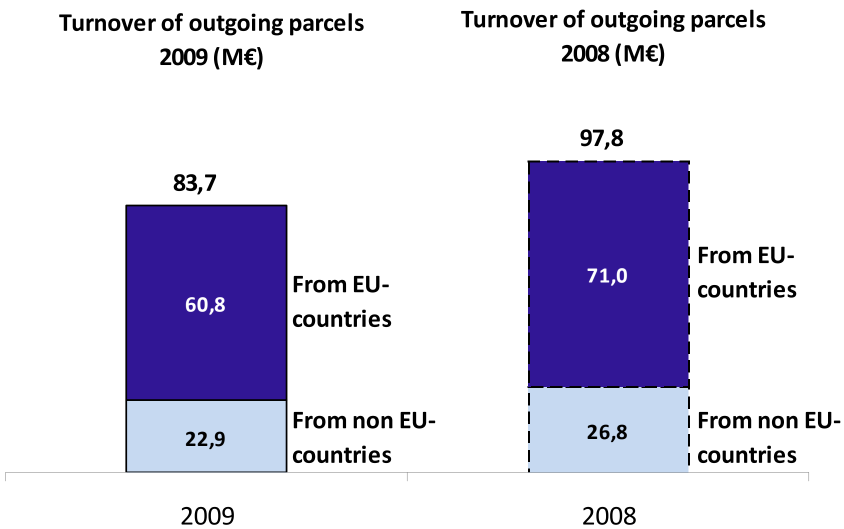

Figure 22: The total turnover of the outgoing parcel market in 2009 and 2008 (Survey by: 2009 Nordic Adviser Group and 2008 Statistics Finland).

A summary of the volume development of international parcel deliveries in 2009 is shown below. According to it, the international parcel volume grew by a total of 1.6 %. Instead, there are significant changes in the distribution of international parcels, because the replies show that the volume of outgoing items dropped significantly, and on the other hand, the volume of incoming items grew considerably.

Figure 23: The total volume of international parcels in 2009 and 2008 (Survey by: 2009 Nordic Adviser Group and 2008 Statistics Finland).

Table 9 shows a summary of the development of the volumes of international letter and parcel deliveries and turnover over the past three years.

	Volume 2009 (million pcs.)	Volume 2008 (million pcs.)	Volume 2007 (million pcs.)	Turnover 2009 (M€)	Turnover 2008 (M€)	Turnover 2007 (M€)
International letters	57	61	62	N/A	N/A	N/A
Incoming international parcels	5.8	4.7	5.3	65.8	53.7	54.5
Outgoing international parcels	3.1	4.0	3.2	83.7	97.8	95.1
International parcels, total	8.8	8.7	8.5	149.5	151.5	149.6

Table 9. The development of international delivery volumes and turnover from them in 2007-2009.

4. Regional distribution of service providers

The survey also examined the regional extension of companies offering postal item services. The results are shown in the maps which have been divided into areas according to province boundaries.

As seen from Figure 24, the licensed providers of letter delivery in Finland are Itella Oyj and Posten Åland Ab. Of these, Itella's operating area is mainland Finland and Åland are the operating area of Posten Åland. In addition to these companies, a group of courier and parcel companies carry out letter delivery in Finland, but their share of the entire letter delivery market is marginal.

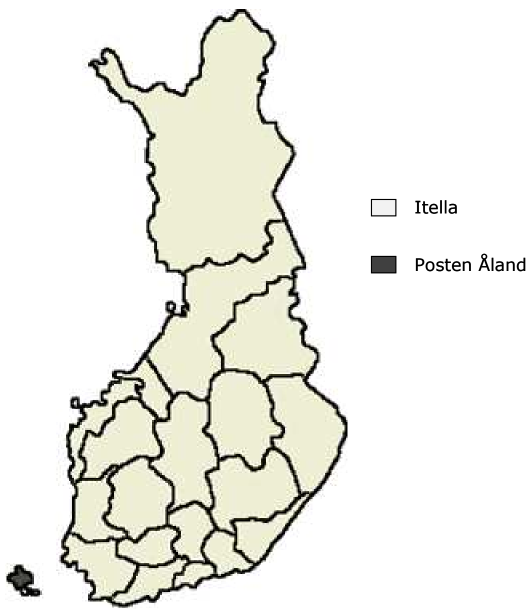

Figure 24: Licensed letter delivery providers in Finland

On the other hand, Figure 25 shows the number of parcel delivery providers by province. In addition to Itella, the following companies operate nationwide: DHL Express Oy, Schenker Cargo Oy, Matkahuolto Oy, Transpoint Oy Ab, TNT Suomi Oy, Kaukokiito Oy, Jetpak Finland Oy, DPD Finland Oy and World Courier (Finland) Oy. Thus, the market is effective throughout the country. In addition to the nine nationwide providers, regional courier and parcel delivery companies operate in Finland.

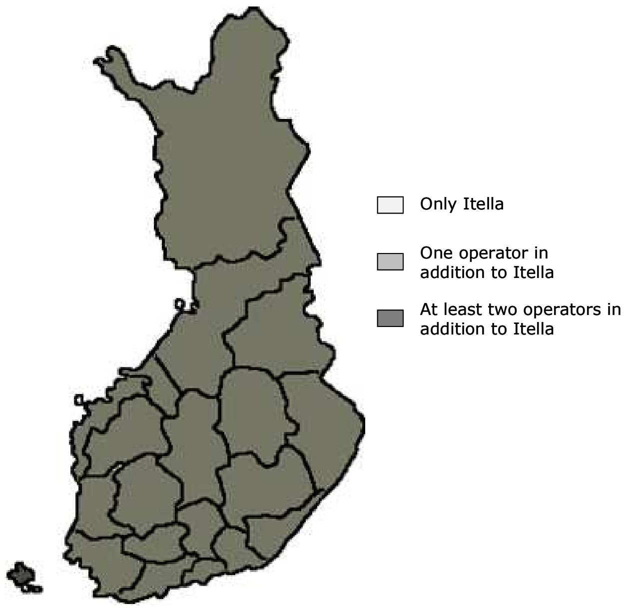

Figure 25: The number of parcel delivery operators by province in Finland.

Figure 26 shows the number of newspaper distributors by province. Naturally, Itella operates throughout mainland Finland in addition to which the majority of provinces also have another newspaper distributor. However, Satakunta is the only province with at least two operators in addition to Itella. The newspaper distributors operating in Satakunta were Aamujakelu Oy, Satakunnan Kirjateollisuus Oy which delivers Satakunnan Kansa and Länsi-Suomi Oy. However, Satakunnan kirjateollisuus Oy sold its distribution operations to Aamujakelu Oy in the beginning of 2010. Itella is the only distribution company in Kainuu, Ostrobothnia, South Ostrobothnia, Central Ostrobothnia, Central Finland, Varsinais-Suomi and Itä-Uusimaa. Posten Åland is the only operator in Åland.

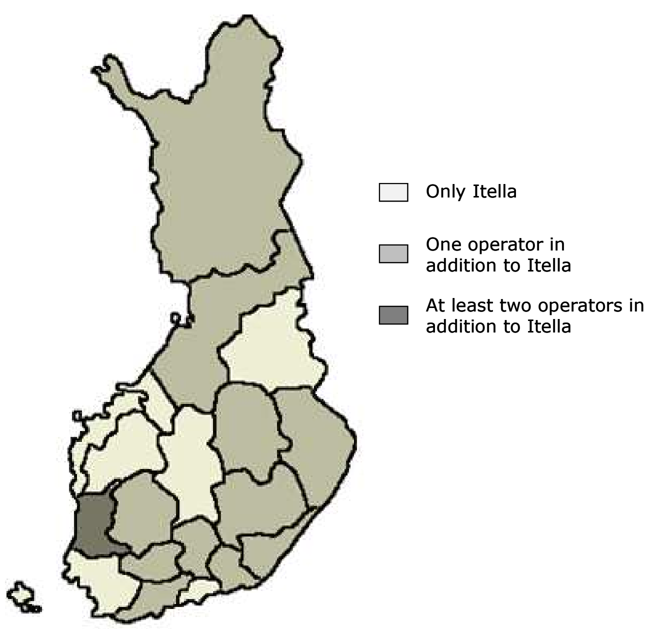

Figure 26: The number of newspaper distributors by province in Finland.

Figure 27 shows the distributors of unaddressed mail by province. Itella Oyj and Suomen Suoramainonta group function throughout mainland Finland. In addition to these operators, there are small, local distributors of unaddressed mail in large population centres in southern Finland. Posten Åland is the only operator in Åland.

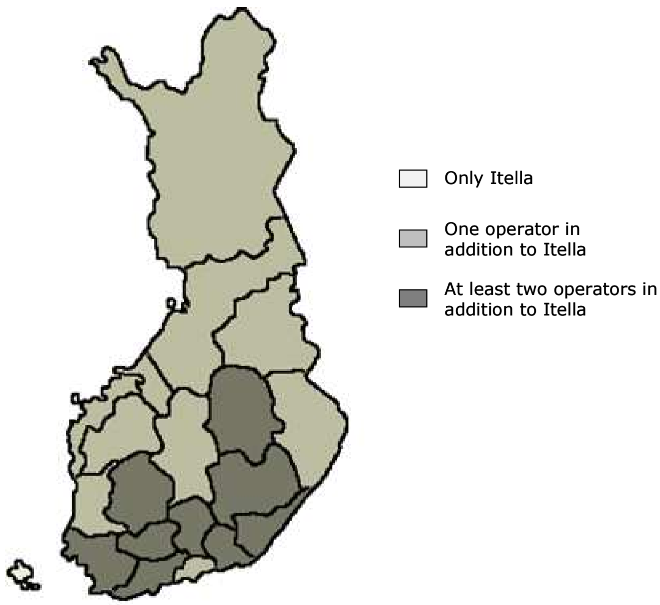

Figure 27: The number of distributors of unaddressed mail by province in Finland

5. Pricing of parcel delivery services

In the survey, parcel delivery companies were requested to present a price for four alternative items: a parcel weighing three kilos and another one weighing 20 kilos sent from the centre of Oulu to the centre of Helsinki (door-to-door) and vice versa. A total of 13 distribution companies submitted price information on parcels.

Figure 28 presents the highest price, based on the survey, the lowest price and a median price for a parcel weighing three kilos sent from Oulu to Helsinki and from Helsinki to Oulu. The highest price for a parcel weighing three kilos sent from Oulu to Helsinki and vice versa was 170 euros, whereas the median price was 24 euros. The lowest price for a parcel weighing three kilos sent from Oulu to Helsinki was 7 euros whereas the lowest price for a similar parcel sent from Helsinki to Oulu was 10 euros. The big differences in the price comparison are due to the various conveyance methods used by companies. Companies that also provided the fastest delivery times by for example using air freight had the highest prices. The prices of companies that transport parcels by land were the least expensive. It should be noted that the lowest price from Oulu to Helsinki was slightly lower than the lowest price for the same parcel sent from Helsinki to Oulu. This may be due to the higher demand for transport capacity from Helsinki to Oulu than vice versa.

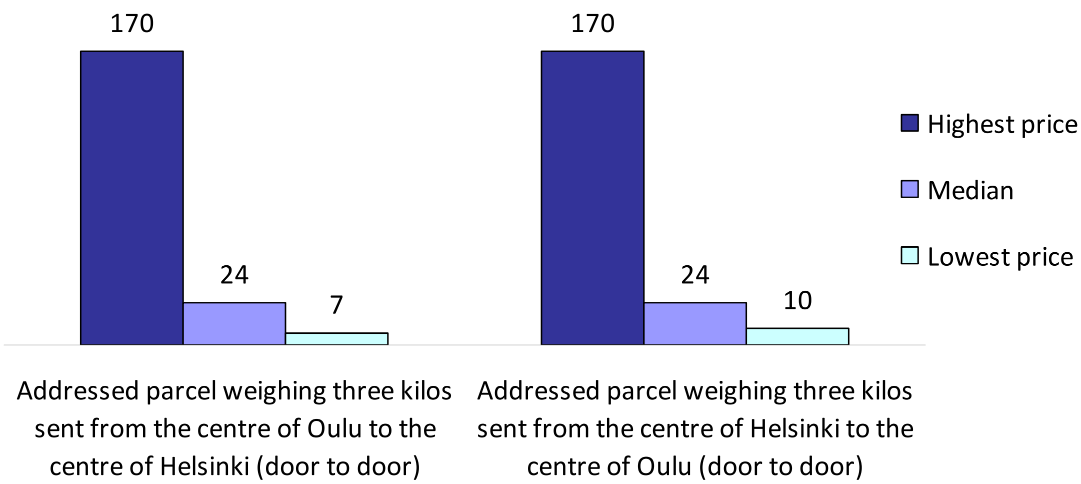

Figure 28: Price comparison of a parcel weighing three kilos sent from Oulu to Helsinki and vice versa.

Figure 29 shows the above-mentioned price comparison for a parcel weighing 20 kilos. The highest price for a parcel weighing three kilos sent from Oulu to Helsinki and vice versa was 350 euros, the median price being 35 euros. The lowest price for a parcel weighing three kilos sent from Oulu to Helsinki was 10 euros whereas the lowest price for a similar parcel sent from Helsinki to Oulu was 14 euros. As above, the big differences in the price comparison of parcels can be explained by the various conveyance methods used by companies. The companies with the highest prices use fast air freight whereas those with low prices use land transport. The lowest price from Oulu to Helsinki was also slightly lower for parcels weighing 20 kilos than the lowest price for the same parcel sent from Helsinki to Oulu. This may be due to the higher demand for transport capacity from Helsinki to Oulu than vice versa.

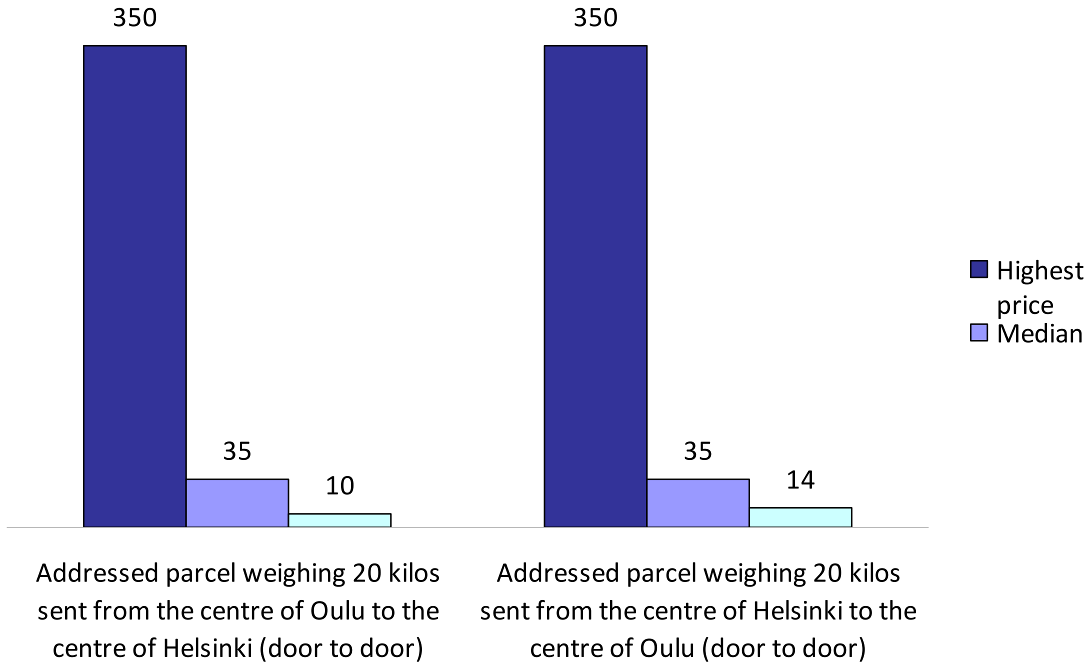

Figure 29: Price comparison of a parcel weighing 20 kilos sent from Oulu to Helsinki and vice versa.

ANNEX 1

Survey on postal and small freight services 2009

The survey covers the time period from 1 January to 31 December 2009.

If the company is a parent company, please submit total figures for the entire group. If your company is a subsidiary or an affiliated company, please submit your company's figures only.

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

You may leave empty the spaces that do not concern your company.

1.1. Company	______________________________
1.2. Possible subsidiaries	______________________________
1.3. Business identification code	______________________________
1.4. Respondent's name	______________________________
1.5. E-email	______________________________
1.6. Telephone number	______________________________

1.7. The number of staff related to postal and small freight activities in Finland (average for the year/financial period):	______________________________

Pick the provinces where your company carries out deliveries

Entire country
( ) Mainland Finland
( ) Entire Finland incl. Åland

Åland
( ) Everywhere in the province
( ) In one or several population centres

Varsinais-Suomi
( ) Everywhere in the province
( ) In one or several population centres

Uusimaa
( ) Everywhere in the province
( ) In one or several population centres

Itä-Uusimaa

( ) Everywhere in the province
( ) In one or several population centres

Kymenlaakso
( ) Everywhere in the province
( ) In one or several population centres

Päijät-Häme
( ) Everywhere in the province
( ) In one or several population centres

Kanta-Häme
( ) Everywhere in the province
( ) In one or several population centres

Pirkanmaa
( ) Everywhere in the province
( ) In one or several population centres

Satakunta
( ) Everywhere in the province
( ) In one or several population centres

Pohjanmaa
( ) Everywhere in the province
( ) In one or several population centres

South Ostrobothnia
( ) Everywhere in the province
( ) In one or several population centres

Central Ostrobothnia
( ) Everywhere in the province
( ) In one or several population centres

Central Finland
( ) Everywhere in the province
( ) In one or several population centres

Etelä-Savo
( ) Everywhere in the province
( ) In one or several population centres

South Karelia
( ) Everywhere in the province

( ) In one or several population centres

North Karelia
( ) Everywhere in the province
( ) In one or several population centres

Pohjois-Savo
( ) Everywhere in the province
( ) In one or several population centres

North Ostrobothnia
( ) Everywhere in the province
( ) In one or several population centres

Kainuu
( ) Everywhere in the province
( ) In one or several population centres

Lapland
( ) Everywhere in the province
( ) In one or several population centres

A detailed description of the distribution area:
____
____
____
____

3.1. Letters (less than 2 kg) addressed mail

Number of items in thousands:	____
Turnover in thousands of euros (VAT 0%):	____

3.2. Parcels (goods) 0-10 kilos

Number of parcels in thousands:	____
Turnover in thousands of euros (VAT 0%):	____

3.3. Parcels (goods) 10-50 kilos

Number of parcels in thousands: ______________________________

Turnover in thousands of euros (VAT 0%): ______________________________

3.4. Unaddressed mail

Number of items in thousands: ______________________________

Turnover in thousands of euros (VAT 0%): ______________________________

3.5. Newspapers and local papers, morning delivery

Number of items in thousands: ______________________________

Turnover in thousands of euros (VAT 0%): ______________________________

3.6. Newspapers and local papers, daytime delivery

Number of items in thousands: ______________________________

Turnover in thousands of euros (VAT 0%): ______________________________

3.7. Magazines, daytime delivery

Number of items in thousands: ______________________________

Turnover in thousands of euros (VAT 0%): ______________________________

Further information:

____

____

____

____

4.1. Letters (less than 2 kg) to EU countries

Number of items in thousands: ______________________________

Turnover in thousands of euros (VAT 0%): ______________________________

4.2. Letters (less than 2 kilos) to non-EU countries

Number of items in thousands: ______________________________

Turnover in thousands of euros (VAT 0%): ______________________________

4.3. Parcels 0-50 kilos (goods) to EU countries

Number of parcels in thousands: ______________________________

Turnover in thousands of euros (VAT 0%): ______________________________

4.4. Parcels 0-50 kilos (goods) to non-EU countries

Number of parcels in thousands: ______________________________

Turnover in thousands of euros (VAT 0%): ______________________________

4.5. Other items (0-50 kilos) to EU countries

Number of items in thousands: ______________________________

Turnover in thousands of euros (VAT 0%): ______________________________

4.6. Other items (0-50 kilos) to non-EU countries

Number of items in thousands: ______________________________

Turnover in thousands of euros (VAT 0%): ______________________________

Further information:

____
____
____
____

5.1. Letters (less than 2 kg) from EU countries

Number of items in thousands: ______________________________

Turnover in thousands of euros (VAT 0%): ______________________________

5.2. Letters (less than 2 kilos) from non-EU countries

Number of items in thousands: ______________________________

Turnover in thousands of euros (VAT 0%): ______________________________

5.3. Parcels 0-50 kilos (goods) from EU countries

Number of parcels in thousands: ______________________________

Turnover in thousands of euros (VAT 0%): ______________________________

5.4. Parcels 0-50 kilos (goods) from non-EU countries

Number of parcels in thousands: ______________________________

Turnover in thousands of euros (VAT 0%): ______________________________

5.5. Other items (0-50 kilos) from EU countries

Number of items in thousands: ______________________________

Turnover in thousands of euros (VAT 0%): ______________________________

5.6. Other items (0-50 kilos) from non-EU countries

Number of items in thousands: ______________________________

Turnover in thousands of euros (VAT 0%): ______________________________

Further information:

____
____
____
____

6.1. Estimate the share of items your company has handled and which pass through the network of Itella i.e. Post or other distributors to a certain extent

Letters (less than 2 kg) addressed mail (%):	______________________________
Parcels 0 - 10 kilos (%):	______________________________
Parcels 10 - 50 kilos (%):	______________________________
Unaddressed mail (%):	______________________________
Newspapers and local papers, morning delivery (%):	______________________________
Newspapers and local papers, daytime delivery (%):	______________________________
Magazines, daytime delivery (%):	______________________________
Incoming international items (%):	______________________________

6.2. Pricing

Estimate the average price for the following services, if your company carries out them (€):

1) addressed parcel weighing three kilos sent from the centre of Oulu to the centre of Helsinki (door-to-door)?	______________________________
2) addressed parcel weighing three kilos sent from the centre of Helsinki to the centre of Oulu (door-to-door)?	______________________________
3) addressed parcel weighing 20 kilos sent from the centre of Oulu to the centre of Helsinki (door-to-door)?	______________________________

4) addressed parcel weighing 20 kilos sent from the centre of Oulu to the centre of Helsinki (door-to-door)? ____

Further comments:
____
____
____
____

Thank you for replying!

Please press the Send button to finish the questionnaire.

ANNEX 2

A list of companies to whom the questionnaire was sent

AAMUJAKELU OY
AB AHLSKOG TRANSPORT - KULJETUS OY
ACTION LÄHETIT OY
AGOPALVELU OY
ASAPPI OY
ASIOINTIPALVELU PIKALÄHETTI P.
RAUTIAINEN OY
B-PALVELU OY
BRING EXPRESS SUOMI OY
CITY MAIL SERVICE HELSINKI OY
CITYCARD OY
CITYPRESS OY
DHL EXPRESS FINLAND OY
ESA JAKELUT Oy
FEDEX EXPRESS OY
FINNAIR CARGO OY
GLS FINLAND OY
HEL-SERVICE OY
HELSINGIN JAKELU-EXPERT OY
HELSINGIN KTK OY
HELSINGIN LÄHIJAKELU OY
HELSINGIN REPROEXPRESS OY
HH PIKAKULJETUS OY
HRX FINLAND OY
HÄMEEN KULJETUS OY
HÄMEENLINNAN JAKELUPALVELU OY
HÄRMÄN KURIIRI OY
ILVES JAKELU OY
ITELLA OYJ
ITÄ-SAVO
JAEL PALVELU OY
JAKELUJUNIORIT OY
JAKELUKULMA OY
JAKELUMASTERS OY
JAKELUPORRAS OY
JAKELUSUORA OY
JAKELU-ÄSSÄT OY
JANTERNET OY
JETPAK FINLAND OY
JKK COURIERS OY
JKK-KOPIO OY
JOENSUUN YKKOSJAKELUT OY
JYVÄSKYLÄN JAKELUT OY
KAINUUN KURIIRI OY
KARJAAN OFFSETPAINO
KARJALAINEN
KAUKOKIITO OY
KESKI-SUOMEN TAVARALÄHETIT OY
KOSKIJAKELUT OY
KTK OY
KULJETUS METSÄ OY
KULJETUS P. RISTOLAINEN OY
KULJETUS VÄLIMAA OY
KULJETUSLIIKE RÄIHÄ OY
KULJETUSPALVELU FÅGEL OY
KUOPION LÄHETTIPALVELU OY
KURIIRIPALVELUT JY - PE OY
KUSTANNUS OY CITY
KÄRKIJAKELU OY
LAHDEN JAKELUT OY
LEGION.FI LÄHETTIPALVELUT
LK JAKELU OY
LÄHETTILAKEUS OY
LÄHETTIPALVELU ESAWAY OY
LÄHETTIPALVELU PORIN NOPEA OY
LÄHETTIPALVELU T. MÖLSÄ OY
LÄHETTIPALVELU TURUN REDLINE OY
LÄHETTIPIRKKA OY
LÄHETTIRENGAS OY
LÄHETTIRYHMA OY
LÄHETTIYKKONEN OY
LÄHETTIYMPYRÄ OY
LÄNSI-SAVO
LÄNSI-SUOMI
LÄNSI-UUDENMAAN MAINOSJAKELU OY
MAILCO OY
MASKUN JAKELUPALVELU OY
MATKAHUOLTO OY AB
MENOX PALVELUT
MÖNKIJÄ-LÄHETIT OY
NAPAPIIRIN KULJETUS OY
NEWSPAPER EXPRESS FINLAND OY
OULUN AUTOKULJETUS OY
OULUN JAKELUTOIMISTO OY
OULUN KURIIRI
OULU-SUORAJAKELU OY
OY KEIKKAPOJAT AB
OY KUEHNE-NAGEL LTD
PAKETTIAPINAT
PASI-JAKELUT OY
PAUMAT OY
PEX LOGISTICS
PICCOLO LOGISTICS OY
PIKKUAHO OY
PIRKAN NOPEA OY
PORIN JAKELUKESKUS OY
PORVOON MEDIAJAKELU OY
POSTEN LOGISTIK SCM OY (DPD Finland Oy)
POSTEN ÅLAND
RAIJARIT OY
RAUMAN SUORAJAKELU OY
RAUTAKIRJA OY
ROADNET FINLAND OY
SALO-SUORAJAKELU OY
SATAKUNNAN KIRJATEOLLISUUS
SAVON JAKELU OY
SAVOTRANS OY
SCHENKER EXPRESS OY

SEINÄJOEN LÄHETTIKESKUS OY
STAR COURIER OY
SUOMEN LÄHIKAUPPA OY
SUOMEN SUORAMAINONTA OY
SUORA LÄHETYS OY
TAMPEREEN YKKÖSJAKELUT OY
TAVARAKURIIRI O. NUOTTAJÄRVI OY
TNT SUOMI OY
TRANSPOINT OY AB
TREMENDO OY
TSUPPARI LÄHETTIPALVELU OY
TURKU-PALVELU OY
TÄHTIJAKELU OY
TÄHTISUORA OY
UPS FINLAND OY
UUTISPOSTI KY / PASI SAAJANLEHTO
VALKEAKOSKEN LÄHETTIPALVELU OY
WHITE S OY
WORLD COURIER FINLAND OY
VR CARGO
XEVOX OY
YOUNG-TEAM OY
ÄIJÄLÄ OY
Total 130