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## Postal Delivery Services Survey 2010

NORDIC ADVISER GROUP

## Foreword

Postal Delivery Services Survey 2010 is a statistics publication drafted by the Nordic Adviser Group and published by FICORA.  
The objective of this survey is to find out which were the largest postal service providers as well as the item quantity and turnover of postal delivery services in 2010.

The survey investigates the size of and changes in the postal delivery services market with regard to its various sub-markets – i.e. in terms of the postal item categories, namely letters, parcels, newspapers and magazines, unaddressed delivery and international delivery. The survey is based on a questionnaire that was mailed to companies providing postal delivery services. The survey is used to follow market developments in the postal sector, and to provide information fulfilling the information needs of the European Commission (Eurostat), the Universal Postal Union (UPU) and others.

FICORA published a postal statistics report (Postal and small freight delivery statistics) in cooperation with Statistics Finland between 1998 and 2009. The Postal Delivery Services Survey is a continuation of these earlier statistical reports.

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Helsinki, June 2011

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## 1. Summary

The Nordic Adviser Group conducted this postal delivery services survey on behalf of FICORA between April and May 2011. Postal delivery services refer to the delivery of letters, parcels, newspapers, magazines and unaddressed items as well as international delivery. The objective of this survey was to find out which were the largest postal service providers as well as the item quantity and turnover of postal delivery services in 2010. The period under review in this survey was from 1 January to 31 December 2010.

Up to 2008, FICORA conducted similar surveys, the latest of which was named Statistics on Postal and Small Freight Delivery Statistics 2008. The methodology for the Postal Delivery Services Survey 2010 was very similar to the one used by FICORA, as both were based on a questionnaire sent out to companies. There were, however, some differences, which means the figures from 2007 and 2008 are not fully comparable with those from 2009 and 2010. For instance, since 2009 a more extensive sample has been used. The surveyed market, however, has remained the same.

Finland's 12 largest postal delivery services companies in terms of their reported turnover are displayed in Table 1. The turnover data has been obtained from the companies' latest available financial statements, either from 2009 or 2010. Apart from Itella, most of the largest companies are foreign transport and courier companies. However, it should be noted that the turnover of many of these companies mainly consists of other operations than those considered strictly postal delivery services. With regard to transport companies, for instance, all items over 50 kg fall outside the scope of this survey. The weight limits of the items examined in the survey are presented in more detail in the questionnaire included as Appendix 1.

	<b>Company</b>	<b>Domicile</b>	<b>Turnover (EUR M)</b>	<b>Year</b>
1	Itella Group	Helsinki	1841.6	2010
2	VR Transpoint	Helsinki	576.0 <sup>1</sup>	2010
3	Schenker Cargo Oy	Helsinki	217.0	2009
4	DHL Freight (Finland) Oy	Vantaa	186.9	2009
5	Kaukokiito Oy	Lahti	128.0	2009
6	TNT Suomi Oy	Vantaa	56.0	2009
7	Matkahuolto Oy Ab	Helsinki	48.7	2009
8	Posten Logistik SCM Oy	Vantaa	46.8	2009
9	Alma Manu Oy (Aamujakelu Oy)	Tampere	45.1	2010
10	UPS Finland Oy	Vantaa	44.0	2009
11	Posten Åland	Mariehamn	35.7	2009
12	Suomen Suoramainonta group	Helsinki	28.6	2009

Table 1. Finland's largest postal delivery service providers in terms of their reported turnover.

The combined turnover of Finland's 12 largest postal delivery service providers is EUR 3.3 billion. According to the responses, only around EUR 1,130 million of this sum, amounting to 35 per cent, is turnover relevant to this survey. Relevant turnover refers to operations included in postal delivery services, comprising magazine and newspaper delivery, delivery of unaddressed items, and sending and delivery services for parcels

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<sup>1</sup> VR Group logistics business turnover

weighing less than 50 kg. Detailed relevant turnover figures are confidential and are not reported.

Figure 1 is a summary of the combined turnover of Finland’s entire postal delivery services market in 2010. However, it should be noted that the turnover figure does not include the turnover of outgoing mail from Finland or incoming mail to Finland, since the turnover for these cannot be calculated based on the available information. The estimated combined turnover for international parcel and letter delivery in 2010 was some EUR 200–220 million.



Figure 1. Combined turnover for Finland’s postal delivery services market in 2010 (M€)

Letter delivery accounts for some 43 per cent of the turnover of Finland’s postal delivery services market. Translated into turnover, this is a little under EUR 500 million. In Finland, Itella Corporation is the primary letter services provider, while Posten Åland handles these services in Åland. The turnover of magazine and newspaper delivery amounts to a little under EUR 300 million, while parcel delivery, with a turnover of some EUR 260 million, accounts for almost one-quarter of the market. The share of unaddressed delivery is around eight per cent, amounting to EUR 85 million.

Compared to 2009, the Finnish postal delivery service market’s turnover decreased by around EUR 60 million, representing around five per cent. The steepest drop was seen in parcel delivery and newspaper and magazine delivery.

The table below presents the item volumes for letter, parcel, newspaper and magazine delivery, and the delivery of unaddressed items, represented by postal item category. Figure 2 shows the volume of Finland’s letter delivery market, which, according to the survey, amounted to 1,113 million items in 2010, representing a drop of 1.4 per cent year on year.

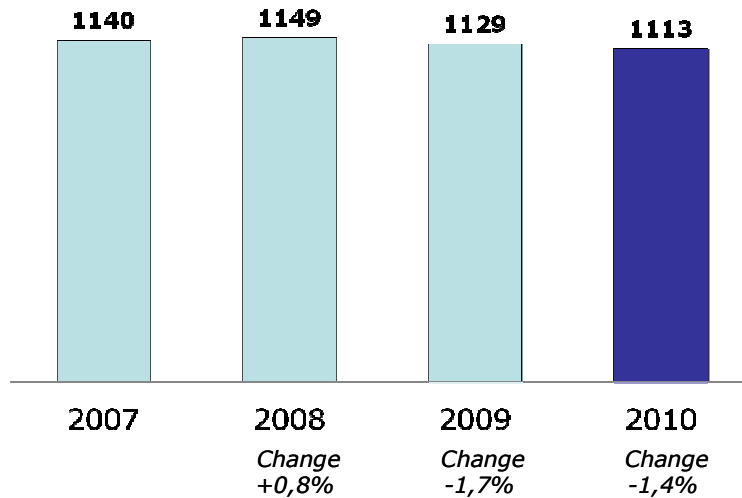


Figure 2. Total volume of the Finnish letter delivery market between 2007 and 2010 (in millions of items). (Research conducted by: Nordic Adviser Group, 2009–10; Statistics Finland, 2007–08.)

Figure 3 shows the total volume of the parcel delivery market in 2010, amounting to around 46.1 million items; in 2009, this figure was 45.3 million. The volume of domestic parcel deliveries remained almost unchanged from the previous year. On the other hand, the amount of parcels delivered to international addresses decreased slightly, and the amount of parcels arriving from abroad saw a marked increase. An increase of over 20 per cent over 2009 figures was witnessed in the amount of items arriving from abroad. Finland is an import-oriented country that has traditionally received more postal deliveries than it has shipped out. The increase in parcels arriving from abroad can be partially explained by the import business and general economic activity picking up. Surprisingly, this has not been evidenced by the amount of parcels sent to international addresses. One of the likely reasons for the growth of items arriving in Finland is surging online sales. Finland has few online stores shipping significant quantities of postal items abroad, but, conversely, items such as books and electronics are flowing into Finland from international online retailers.

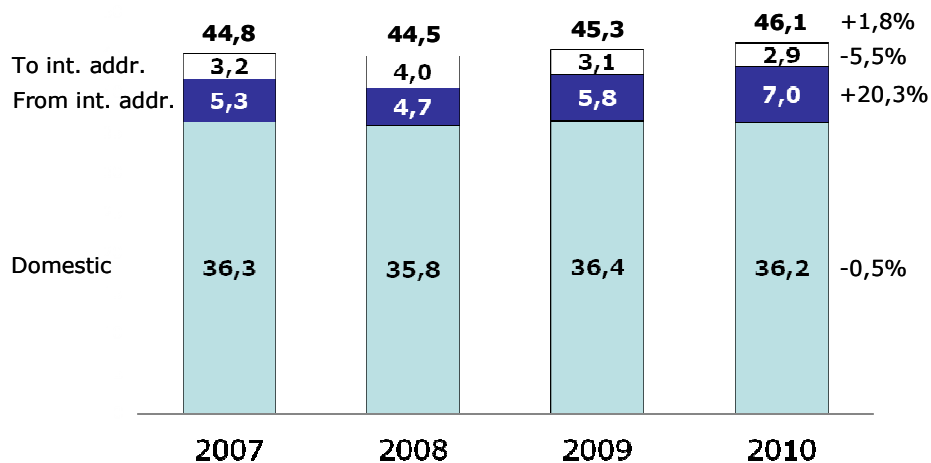


Figure 3. Total volume of the Finnish parcel delivery market between 2007 and 2010 (in millions of items). (Research conducted by: Nordic Adviser Group, 2009–10; Statistics Finland, 2007–08.)

As can be seen in Figure 4, the total volume of newspaper deliveries in 2010 amounted to 1,034 million items, whereas the same figure was 1,075 million in 2009. This represents a decrease of 3.9 per cent year on year in the total volume of newspaper and magazine deliveries. The volume of daytime deliveries, including magazines, dropped by 6.5 per cent, whereas early-morning deliveries experienced a smaller decline, by 1.3 per cent. Statistics for 2008 regarding the split between newspaper delivery to early-morning and daytime delivery are not available.

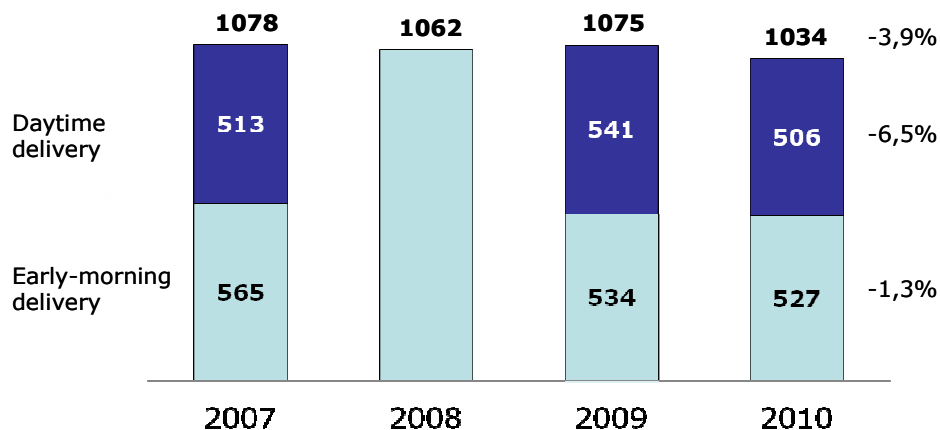


Figure 4. Total volumes of newspaper and magazine deliveries between 2007 and 2010 (in millions of items). (Research conducted by: Nordic Adviser Group, 2009–10; Statistics Finland, 2007–08.)

The volume of unaddressed deliveries in 2010 was 1923 million items, an increase of 62 million items year on year, representing 3.3 per cent (see Figure 5). Thus, the total volume of unaddressed deliveries continued its steady climb.

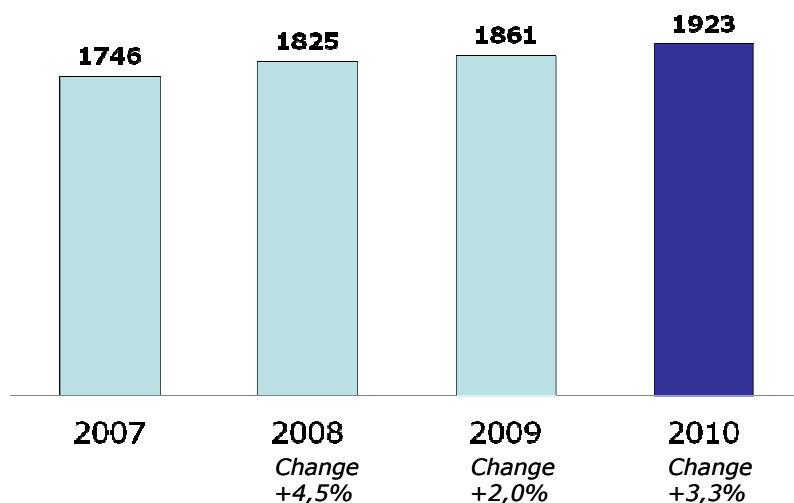


Figure 5. Total volumes of unaddressed delivery between 2007 and 2010 (in millions of items). (Research conducted by: Nordic Adviser Group, 2009–10; Statistics Finland, 2007–08.)

Table 2 presents the development figures for delivery volumes and the resulting turnover for 2008–2010, divided by postal item category. The figures for 2009 and 2010

are based on surveys conducted by the Nordic Adviser Group, while the 2008 figures are based on Statistics Finland surveys. Statistics Finland only reported turnover figures for parcel delivery in 2008.

	<b>Volume 2008 (million items)</b>	<b>Volume 2009 (million items)</b>	<b>Volume 2010 (million items)</b>	<b>Turnover 2008 (EUR million)</b>	<b>Turnover 2009 (EUR million)</b>	<b>Turnover 2010 (EUR million)</b>
<b>Domestic letter delivery</b>	1,088	1,072	1,058	N/A	497	489
<b>Domestic parcel delivery</b>	35.8	36.4	36.2	302	298	261
Newspapers early-morning delivery	Total 715	534	527	N/A	160	154
Newspapers daytime delivery		171	167	N/A	36	35
Magazines	347	370	339	N/A	110	101
<b>Newspaper and magazine delivery, total</b>	1,062	1,075	1,034	N/A	306	290
<b>Unaddressed delivery</b>	1,825	1,861	1,923	N/A	85	85
<b>International letter delivery</b>	61	57	56	N/A	N/A	N/A
Parcels from international addresses	4.7	5.8	7.0	54	66	82
Parcels to international addresses	4.0	3.1	2.9	98	84	77
<b>International parcel delivery, total</b>	8.7	8.9	9.9	152	150	159

Table 2. The development figures for delivery volumes and the resulting turnover for 2008-2010, divided by postal item category.

## **2. Implementation of the survey**

### **2.1 Survey target group**

The target group of the survey, i.e. the group of companies that was surveyed, included companies and organisations providing postal delivery services in Finland. The surveyed companies thus comprised all companies that provide delivery or transport in some of the following postal item categories: letter, parcel, newspaper and magazine delivery or unaddressed delivery. The results of the survey, mostly in terms of volume and turnover data, are also displayed in accordance with the same division.

### **2.2 Identification of companies**

The list that includes the companies belonging to the survey sample was compiled from a number of sources. In addition to operator information collected by the Nordic Adviser Group during earlier projects related to the postal sector, the following were used as information sources: Statistics Finland's statistics on the postal and courier sectors, the Orbis database, early-morning delivery statistics from the Finnish Newspaper Association, VTT's list of Finland's newspaper delivery organisations, the Fonecta Finder service, corporate websites, the Trade Register business database, and previous research on the postal and courier sectors. As a result, Nordic Adviser Group came up with a list of the 133 largest postal services companies (Appendix 2), to whom an electronic questionnaire was sent (Appendix 1). Around 180 small limited and partnership companies and registered associations were excluded from the survey. According to the Statistics Finland register, this represents under 0.3 per cent of the market turnover. These operators primarily deliver unaddressed items or parcels and letters as a courier service.

### **2.3 Implementation model**

The survey was carried out by electronic means, using Digium Enterprise software. On 13 April 2011, an email was sent to the contact persons of all companies belonging to the target group. This message included an introduction to the objectives of the survey and a personal link to the online questionnaire. The questionnaire is attached at Appendix 1. The most significant part of the questionnaire comprised questions aimed at finding out the quantities and turnover of the operators' postal delivery services for 2010, divided into the four categories described above. Additionally, the questionnaire investigated such matters as the number of personnel dedicated to delivery services, the number of operator offices, and the transfer of deliveries in the delivery networks of the other operators.

The companies selected for the survey were given until the end of April to respond. The incentive to respond was enhanced by promising to provide a summary of the sector's structure, based on the survey, to all survey respondents. Reminder emails were sent to the companies during the answering period. Those companies that did not respond even after this were called in an order determined by their turnover, in an attempt to elicit answers either on the phone or by requesting them to complete the online questionnaire.

### **2.4 Reply rate**

The companies that replied to the survey account for over 99 per cent of the turnover of the entire postal and small transportation sector in Finland. Table 3 shows the total turnover of the companies that replied in relation to the entire survey sample by postal item category.

	<b>Respondent turnover (% of entire market)</b>	<b>Number of respondents in relation to sample</b>
<b>1. Letter delivery</b>	100%	12/12
<b>2. Parcel delivery</b>	98+%	22/88
<b>3. Magazine and newspaper delivery</b>	100%	12/12
<b>4. Unaddressed delivery</b>	98+%	29/36

Table 3 Respondents turnover share of market turnover (by postal item category).

In Table 3 the number of companies, combined by postal item categories, exceeds the aforementioned number of 133, since a company can operate under more than one postal item category. For instance, Itella has been included in every postal item category.

The highest reply rates were obtained from newspaper delivery operators and unaddressed delivery operators. The number of these operators was quite limited and they could therefore be easily identified. Acquiring information from parcel delivery companies proved the most challenging since there are a great number of these companies, many of which engage in small-scale parcel delivery as a side business. Moreover, the parcel delivery sector does not have a unified trade union or other umbrella organisation that might maintain a comprehensive register of operators in the sector or that would compile statistics on its activities.

## 2.5 Validation of replies and completion of missing information

All the displayed results refer to the overall market, not simply to the volumes and turnovers of the responding companies. The combined item volume and turnover of the entire sample (133 companies) was assessed on the basis of the information provided by the respondents. As for the parcel delivery and unaddressed delivery markets, the volume and turnover of the companies that fell outside the sample were also considered when calculating the size of the post item category-specific market. Turnover data from Statistics Finland's register for the postal, delivery and courier sector was utilised in the assessment. Since the respondents represent such a large proportion of the overall market, the resulting figures should provide a rather accurate picture of the volume and turnover of Finland's postal delivery services market and its sub-markets.

The accuracy of the replies was evaluated by comparing the unit prices of different product groups among the respondents. The respondents were requested to clarify any differences that were unaccounted for. Furthermore, the results were compared with figures provided in statistics and investigations carried out by third parties. This was done, where possible, with early-morning volumes of newspapers, for which the Finnish Newspaper Association maintains accurate statistics. Additionally, volume numbers were compared on a category-specific basis with the results of earlier investigations into the sector. If possible, unclear figures were also cross-checked with information published by the companies on their websites or annual reports.

Even though the combined turnover of the respondents accounted for most of the estimated postal item category-specific turnovers, no specific numbers could be obtained from some of the operators regarding, for instance, their turnover or item quantity. In

the case of these companies, estimates on the missing information were made on a case-by-case basis using the available information. Typically, this information was extrapolated from the responses of similar companies, using information such as the average unit prices or shares of turnover. If a parcel delivery company's parcel item quantities for parcels under 50 kg was known, but their turnover was not, this turnover figure was estimated on the basis of the parcel-specific turnover of similar companies. If, on the other hand, the respondent failed to estimate the proportion of parcels under 50 kg in the total quantity of parcels delivered by the company, the estimate was based on the replies of companies that the respondent thought were most similar with regard to their parcel profile.

The questionnaire also requested the companies to provide an estimate of the proportion that their deliveries travelled at some point through the delivery network of Itella or some other operator. This information was requested in order to eliminate the proportion of overlapping deliveries when calculating total volumes. Without taking this process into account, a delivery that travelled through the delivery networks of three different operators would be displayed as three different deliveries in the total volumes. This adjustment helped to provide a more accurate picture of the size of the sector. According to the results, the proportion of deliveries travelling through more than one delivery network was rather significant. For instance, more than one-third of all parcel deliveries travelled through at least two operators' delivery networks, according to the replies.

### 3. Letter delivery

This section looks at the volume of domestic letter deliveries. According to the responses, differentiation between letters and parcels can be quite difficult for companies other than those offering letter and parcel delivery as a universal service. The Postal Services Act defines a letter item as being an addressed letter or postcard, weighing no more than two kilograms, that is submitted to the postal services operator for delivery. The majority of the large international courier companies define all their items as parcels by default, even when they resemble letters (e.g. a CD in a padded envelope). In these cases, this survey has also defined the items as parcels. However, the share of the letter delivery market covered by providers others than Itella and Posten Åland is marginal to say the least. Intra-company letter delivery, handled by companies themselves, is not included in this survey.

#### 3.1 Operators in the market

In Finland, the only operators providing letter delivery as a universal service are Itella Corporation, operating under the name Finland Post, and Posten Åland. Itella Corporation is the only operator that provides postal services included in the universal service sector throughout mainland Finland, including the delivery of addressed letters under 2kg. Posten Åland's operating area only comprises Åland. Both of these companies operate under the universal service obligation and must deliver all addressed letter items to practically any address, five days a week. They hold a virtual monopoly with regard to letter delivery in their respective operating areas. In addition to letter mail delivered as a universal service, delivery services of letters under 2 kg provided by various kinds of messenger and courier companies were included in letter delivery in this survey.

Itella Corporation's total turnover amounted to EUR 1.84 billion, while that of Posten Åland amounted to around EUR 36 million (in 2009). Jointly, these companies account for almost all delivery of letters weighing less than 2 kg in Finland, comprising around 1.06 billion sent letters.

#### 3.2 Market development in 2010

According to an estimate based on the investigation, Finland's domestic letter delivery volume amounted to 1,058 million items in 2010. This figure is partially based on an estimate, since some operators only publish the total number of delivered letters without dividing it into domestic and international deliveries. Thus, the number of letters being sent to international addresses and arriving from abroad has been estimated on the basis of previous years' figures, assuming a decrease of three per cent in the number of deliveries to international addresses in 2010, matching the drop in all first class letters.

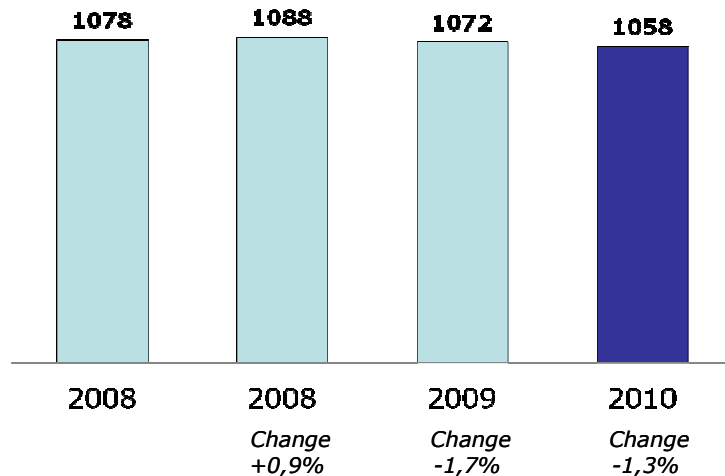


Figure 6. Total volume of domestic letter deliveries between 2007 and 2010 (in millions of items). (Research conducted by: Nordic Adviser Group, 2009–10; Statistics Finland, 2007–08.)

The responses concerning the turnover generated by letter delivery were also found lacking. It is, however, possible to draft a rough estimate regarding the market's total turnover with the use of Statistics Finland's figures for 2007. In 2007, the turnover per delivered letter amounted to 42.8 cents. After adjusting this letter-specific figure for price changes, it was applied to the figures in 2010 which yielded an estimated EUR 489 million for the total turnover of letter deliveries (VAT 0%). This represents a 1.6 per cent drop compared to the turnover for 2009. A partial reason for this decrease in turnover is the fact that in the beginning of August 2010, Itella had to reduce the price of its first class postage stamp from EUR 0.80 to EUR 0.75. On the other hand, it simultaneously raised the prices of some of its services.

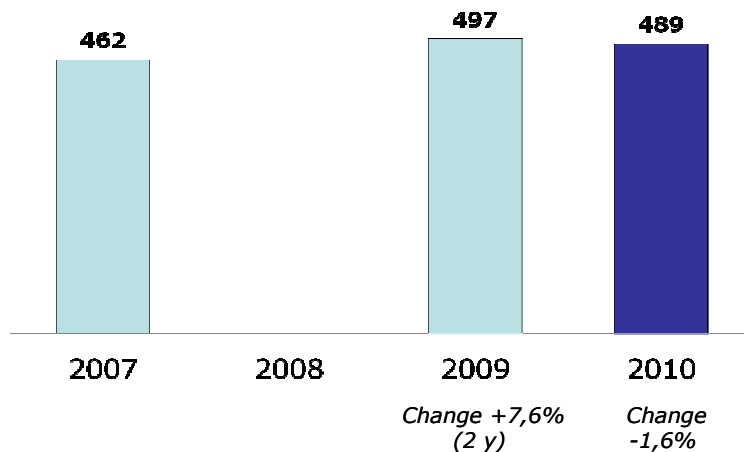


Figure 7. Turnover of the Finnish letter delivery market between 2007 and 2010 (EUR million). (Research conducted by: Nordic Adviser Group, 2009–10; Statistics Finland, 2007–08.)

International letter delivery is divided into letters arriving from abroad and letters sent from Finland to international addresses. However, not all operators publish data regarding the split of their letter volume into domestic and international items, but only report the total volume instead. Owing to this, some companies' proportion of international items has been estimated on the basis of the total figures from 2008, with

the assumption that item quantities have reflected the change in the quantity of first class letters.

The total amount of delivered letters in 2010, which was arrived at by means of this method, was 55.6 million. An estimated 20 million of these were sent from Finland to international addresses, while around 36 million were sent to Finland from abroad. The turnover generated by international letter delivery cannot be estimated with sufficient accuracy due to missing information.

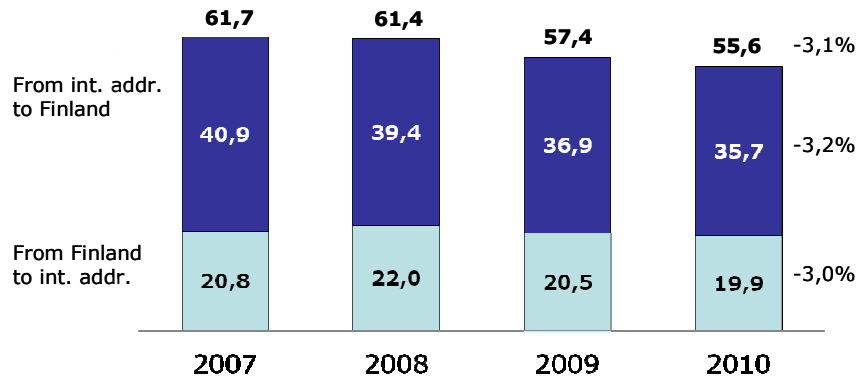


Figure 8. Total volumes of international letter delivery between 2007 and 2010 (in millions of items). (Research conducted by: Nordic Adviser Group, 2009–10; Statistics Finland, 2007–08.)

Table 4 shows a summary of the development over the last three years of the volume of sent letters and the turnover generated by this.

	Volume 2008 (million items)	Volume 2009 (million items)	Volume 2010 (million items)	Turnover 2008 (EUR million)	Turnover 2009 (EUR million)	Turnover 2010 (EUR million)
<b>Domestic letter delivery</b>	1,088	1,072	1,058	N/A	497	489
Delivery from international addresses	39	37	36	N/A	N/A	N/A
Delivery to international addresses	22	21	20	N/A	N/A	N/A
<b>International letter delivery</b>	61	57	56	N/A	N/A	N/A

Table 4. The development of the volume of sent letters and the turnover generated by this between 2008 and 2010.

## 4. Parcel delivery

This section looks at domestic and international parcel delivery. According to the responses, differentiation between letters and parcels can be quite difficult for companies other than those offering letter and parcel delivery as a universal service. As already mentioned, the majority of the large international courier companies define their items as parcels by default, even when they resemble letters (e.g. a CD in a padded envelope). This survey has also defined these items as parcels. Intra-company parcel delivery, handled by companies themselves, is not included in this survey.

### 4.1 Operators in the market

In Finland, parcel delivery services are provided by a large number of different companies. Itella is the only operator with a universal service obligation, i.e. a duty to provide for the delivery of parcels weighing less than 10 kg (20 kg in the case of deliveries arriving to Finland) throughout the country. In addition to Itella, parcel delivery services are provided in Finland by a large number of parcel and courier companies that belong to international chains, and by many smaller domestic operators.

Table 5 shows the ten largest providers of parcel delivery services in Finland in terms of reported total turnover (not parcel delivery turnover).

	<b>Company</b>	<b>Domicile</b>	<b>Turnover (EUR M)</b>	<b>Year</b>
1	Itella Corporation	Helsinki	1841.6	2010
2	VR Transport	Helsinki	576.0 <sup>2</sup>	2010
3	Schenker Cargo Oy	Helsinki	217.0	2009
4	DHL Freight (Finland) Oy	Vantaa	189.9	2009
5	Kaukokiito Oy	Tampere	126.6	2009
6	TNT Suomi Oy	Vantaa	56.0	2009
7	Matkahuolto Oy Ab	Helsinki	48.7	2009
8	Posten Logistik SCM Oy	Vantaa	46.8	2009
9	UPS Finland Oy	Vantaa	44.0	2009
10	Posten Åland	Mariehamn	35.7	2009

Table 5. The ten largest providers of parcel delivery services in Finland in terms of reported total turnover.

All of the companies listed above, with the exception of Posten Åland, operate throughout Finland. This means that they are able to deliver a parcel to almost any address within Finnish borders.

The facilities located in Finland providing parcel delivery services can primarily be divided into five categories: Itella's facilities (almost 150), Matkahuolto's facilities (around 60), Rautakirja's R-kioski kiosks (over 700), stores belonging to the Suomen Lähikauppa chain (Siwa, Valintatalo and Euromarket, over 700 in total), and other facilities (cafes, village shops, etc., numbering several hundred in total). When dissecting the delivery networks, the fact that a number of delivery companies may use the same facilities tends to blur the overall picture. For instance, one R-kioski kiosk may serve as an outlet

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<sup>2</sup> VR Group logistics business turnover

for parcels delivered by Itella and Matkahuolto, while at the same time providing Rautakirja's own ÄrräPaketti service.

Itella's parcel pick-up facility network comprises almost 1,100 facilities, 150 of which are operated by Itella itself, while the rest are operated by entrepreneurs. The latter category includes around 150 stores belonging to Suomen Lähikaupat, a large number of R-kioski kiosks, and a number of other kiosks and stores. Itella also operates some unmanned vending machines for postal item pick-up.

Matkahuolto's pick-up facility network comprises Matkahuolto's own facilities, stores belonging to the Suomen Lähikauppa chain, and other facilities including for instance R-kioski kiosks. In total, Matkahuolto offers around 1,200 pick-up facilities for the parcels it delivers. Matkahuolto also delivers the majority of the parcels branded with the Sweden Post-owned Posten Logistik SCM Oy's MyPack brand through its pick-up facility network. With regard to deliveries to international addresses, Matkahuolto cooperates with TNT Suomi Oy, meaning that a customer can send and pick up parcels delivered by TNT Suomi Oy at the facilities belonging to Matkahuolto's delivery network.

The R-kioski kiosks owned by Rautakirja offer their customers the ÄrräPaketti service, through which customers can send parcels between R-kioski kiosks throughout Finland. The service is available every day during R-kioski opening hours, and it covers all 700 R-kioski kiosks in Finland. Schenker Cargo Oy is responsible for ÄrräPaketti deliveries.

In addition to the above, many operators have their own smaller pick-up facility networks in Finland. For instance, VR Transpoint has a network of 25 facilities, mainly at train stations. International courier companies typically only have one or two facilities in Finland.

Of the 88 companies handling parcel deliveries included in the sample, only 22 replied, as was shown in Table 3. Even though this proportion may seem low, the largest companies in the sector replied, including all the companies mentioned in Table 5. Accordingly, the respondents accounted for 98 per cent of the total turnover of parcel deliveries in Finland.

The respondents reported their total numbers of parcel items quite specifically. However, not all courier companies maintain statistics on the number of parcel items by weight, nor do they keep separate statistics on domestic and international deliveries. Therefore, the authors of this survey were forced to partially estimate such matters as the division of the total number of domestic parcel items into different weight classes. The turnover figures for some companies were also estimated.

The following principles were followed when making the estimation, for the main part. The turnover figures for individual companies were estimated on the basis of the item-specific turnover (turnover per item) of companies used for comparison or the average prices obtained from the respondents. The division of volumes into different weight classes was performed on the basis of average item weights, which were obtained from the respondents, or on the basis of the weight division of parcels in the companies used for comparison. Companies used for comparison are those companies from the same sector that are as similar as possible in terms of their operations and how they divide parcels into weight classes. When splitting parcel volumes in terms of international delivery and domestic delivery, the distribution indicated by the companies used for comparison or the proportions indicated by Statistics Finland's 2008 total figures were used.

## 4.2 Market development in 2010

According to the survey, Finland's domestic parcel delivery volume amounted to 36.2 million items in 2010. Of the total number, 26.6 million items weighed under 10 kg, representing 74 per cent. Around 9.6 million parcel items in the 10-50 kg weight range were delivered in Finland. There was a slight drop in the total number of domestic parcel items delivered compared with 2009 figures. According to the responses, the sharpest decrease was experienced in the 0-10 kg weight range, since the delivery volume for 10-50 kg parcels was reported to have grown approximately 5 per cent.

It should be noted that the total number of domestic parcel items delivered by the operators exceeded 36 million to a significant degree, since many of the parcels travel through many operator networks. In order to eliminate overlap, the questionnaire requested the companies to provide an estimate of the share that their deliveries travelled through the delivery network of Itella or some other operator. Without this information, a delivery that travelled through the delivery networks of three different operators would be displayed as three different deliveries in the total volumes. This adjustment helped in providing a more accurate picture of the size of the parcel market. Around one-third of all parcel deliveries travelled through at least two operators' delivery networks, according to the replies.

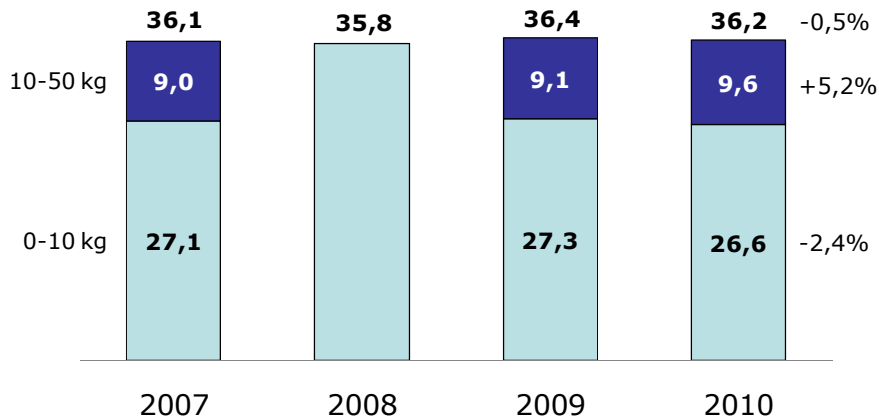


Figure 9. Total volume of domestic parcel delivery between 2007 and 2010. (Research conducted by: Nordic Adviser Group, 2009–10; Statistics Finland, 2007–08.)

The delivery of 36.2 million domestic parcels generated an estimated EUR 261 million in turnover, amounting to around EUR 7.2 per item. Parcels in the 0-10 kg weight range accounted for around EUR 161 million, or a little over 60 per cent, of the total, even though they represented almost three-quarters of the total quantity of items. Around EUR 6 per item in turnover was generated by parcels under 10 kg, while parcels in the 10-50 kg weight range generated an average of EUR 10.5 per item in turnover. In 2009, these figures were around EUR 7.0 for 10 kg parcels, and EUR 11.6 for 10-50 kg parcels. This means that the prices went down in both of these weight classes during the year under review. Overall, the turnover of the domestic parcel delivery market dropped by over 12 per cent, even though volumes only went down by a little over one per cent.

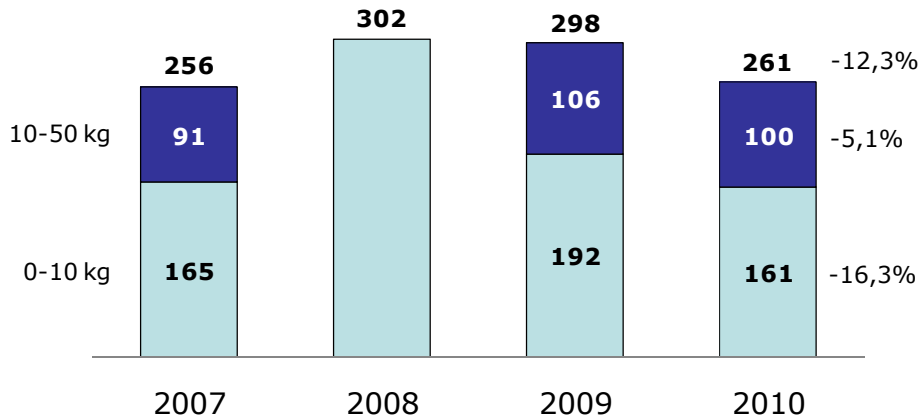


Figure 10. Turnover of domestic parcel delivery between 2007 and 2010. (Research conducted by: Nordic Adviser Group, 2009–10; Statistics Finland, 2007–08.)

The item quantity of international parcel delivery grew from some 9 million items in 2009 to around 10 million in 2010, representing a growth of over 11 per cent. It is interesting that the amount of parcels sent to international addresses went down slightly from the previous year, whereas the amount of parcels arriving from abroad saw a marked increase of over 20 per cent. One explanation for this increase might be the growth of general economic activity and imports in 2010. However, one might expect this to be reflected in the amount of parcels sent from Finland to international addresses — at least to some extent. Another possible reason for the growth of deliveries to Finland is the increase in online sales. Finland has few online stores shipping significant quantities of postal items abroad. Conversely, such items as books and electronics are flowing to Finland from international online retailers.

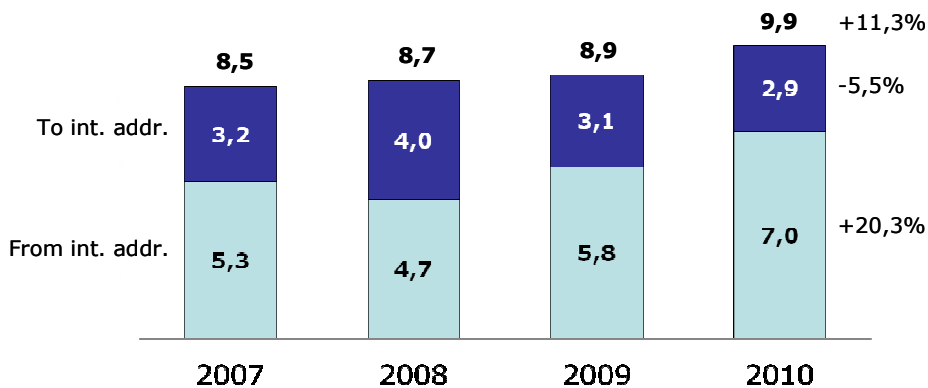


Figure 11. Volumes of international parcel delivery between 2007 and 2010. (Research conducted by: Nordic Adviser Group, 2009–10; Statistics Finland, 2007–08)

Figure 12 shows that, according to the replies, parcel deliveries generated some EUR 159 million in turnover and it was 7 per cent more compared to the previous year. The 20 per cent growth in items arriving from abroad resulted in an increase of over 25 per cent in turnover. The growth was significant, but unit prices for parcels arriving in Finland also went up slightly. The average turnover per parcel arriving from abroad amounted to EUR 11.8.

The turnover of parcel items sent to international addresses decreased by some 8 per cent, down from EUR 84 million to EUR 77 million. During this period, the decrease in volume amounted to just over 5 per cent, meaning that a slight drop was seen in unit

prices. The average turnover per parcel sent to an international address amounted to EUR 26.3. This was more than double the average turnover of parcels arriving in Finland. One explanation might be the turnover of items arriving in Finland being partially assigned to the foreign subsidiaries or affiliated companies of organisations operating in Finland, instead of the turnover being assigned to these Finnish companies. This would mean that Finnish companies in the sector are not reporting these turnover figures. On the other hand, many more parcels arrive in Finland than are sent from Finland to international addresses, which must also influence the price of parcels. Nevertheless, similar results can also be seen in the previous years' results.

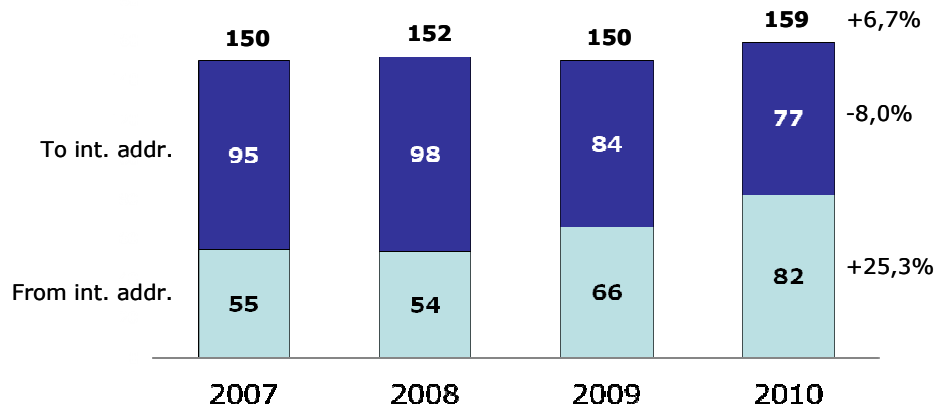


Figure 12. Turnover of international parcel deliveries between 2007 and 2010. (Research conducted by: Nordic Adviser Group, 2009–10; Statistics Finland, 2007–08.)

Table 6 shows a summary of the development over the last three years of the volumes of parcel delivery and the turnover generated by this.

	Volume 2008 (million items)	Volume 2009 (million items)	Volume 2010 (million items)	Turnover 2008 (EUR million)	Turnover 2009 (EUR million)	Turnover 2010 (EUR million)
<b>Domestic parcel delivery</b>	35.8	36.4	36.2	302	298	261
Parcels from international addresses	4.7	5.8	7.0	54	66	82
Parcels to international addresses	4.0	3.1	2.9	98	84	77
<b>International parcel delivery, total</b>	8.7	8.9	9.9	152	150	159

Table 6. The development of volumes of parcel deliveries and the turnover generated by this between 2008 and 2010.

## 5. Magazine and newspaper delivery

### 5.1 Operators in the market

In Finland, magazine and newspaper delivery is primarily handled by Itella Corporation and around a dozen delivery organisations owned by newspaper companies. Magazine and newspaper delivery can be classified into early-morning delivery and daytime delivery, based on the time of delivery. Typically, newspapers that are published six or seven times per week are delivered in the early-morning delivery, while magazines as well as newspapers that are published three times a week or less often are delivered in the daytime delivery. The regional delivery organisations owned by newspapers use early-morning deliveries almost exclusively. On the other hand, Itella is responsible for almost all daytime deliveries, since it delivers letter mail throughout Finland in this way.

Magazine and newspaper delivery can also be classified into magazine and newspaper delivery, of course. Many newspapers such as Aamulehti, Kaleva, Hämeen Sanomat and Karjalainen employ their own regional delivery organisations that deliver newspapers in the early morning in the primary target areas of these newspapers. Itella is the only company with a magazine and newspaper delivery network that covers all of mainland Finland. However, Itella does not deliver newspapers throughout the country during early-morning delivery. Instead, it uses daytime delivery to deliver these in sparsely populated areas. In Åland, Posten Åland is responsible for early-morning and daytime delivery.

Table 7 shows the ten largest providers of magazine and newspaper delivery services in Finland in terms of reported total turnover (not turnover of magazine and newspaper delivery). Typically, these companies are newspaper companies or their subsidiaries such as Sanomalehti Karjalainen Oy, which handles both the publication and delivery of the newspaper, or Ilves Jakelu Oy, which is responsible for the early-morning delivery of its parent company's newspaper, Hämeen Sanomat.

	<b>Company</b>	<b>Main owner</b>	<b>Domicile</b>	<b>Turnover (EUR M)</b>	<b>Year</b>
1	Itella Corporation	State of Finland	Helsinki	1841.6	2010
2	Alma Manu Oy	Alma Media	Tampere	45.1	2010
3	Posten Åland	State of Finland <sup>3</sup>	Mariehamn	35.7	2009
4	Sanomalehti Karjalainen Oy	Pohjois-Karjalan Kirjapaino Oyj	Joensuu	20.7	2009
5	Etelä-Savon Viestintä Oy	Länsi-Savo Oy	Mikkeli	13.4	2009
6	ESA Jakelut Oy	Esan Kirjapaino Oy	Lahti	8.8	2009
7	Sanomalehti Oy Länsi-Suomi	Länsi-Suomi Yhtymä Oy	Rauma	8.3	2010
8	Itä-Savo Oy	Länsi-Savo Oy	Parikkala	7.3	2009
9	Savon Jakelu Oy	Keskisuomalainen Oyj	Varkaus	6.0	2009
10	Ilves Jakelu Oy	Hämeen Sanomat Oy	Hämeenlinna	5.6	2009

Table 7. The ten largest providers of magazine and newspaper delivery services in Finland in terms of reported total turnover.

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<sup>3</sup> Åland Province

## 5.2 Market development in 2010

According to the survey, the respondents' total item quantities related to magazine and newspaper delivery in 2010 amounted to a total of 1,034 magazines and newspapers. Newspapers accounted for 695 million of this, representing a drop of 1.4 per cent year on year. Thus, the constant decline of newspaper delivery volumes continued.

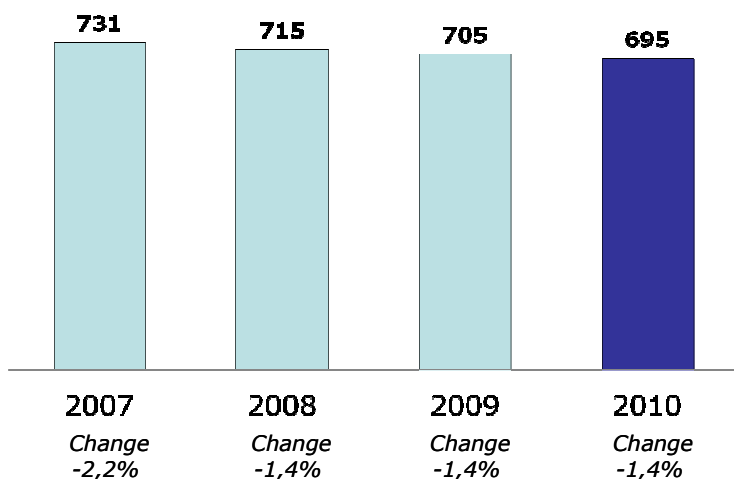


Figure 13. Total volumes of newspaper delivery between 2007 and 2010 (in millions of items). (Research conducted by: Nordic Adviser Group, 2009–10; Statistics Finland, 2007–08.)

According to the survey, the volume of magazine deliveries in 2010 amounted to 339 million items. This represented an 8.4 per cent drop year on year, a rather significant decline. Itella is virtually exclusively responsible for magazine delivery in Finland.

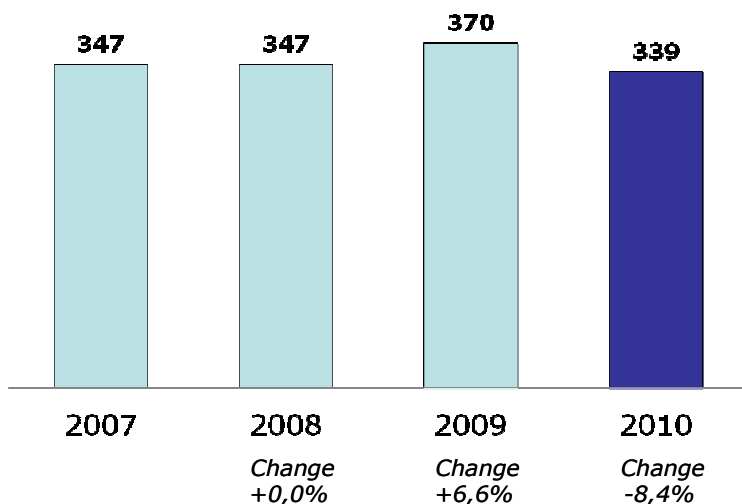


Figure 14. Total volumes of magazine deliveries between 2007 and 2010 (in millions of items). (Research conducted by: Nordic Adviser Group, 2009–10; Statistics Finland, 2007–08.)

No detailed information is available for the distribution of newspaper delivery volumes in terms of early-morning and daytime deliveries. However, by using the Finnish Newspaper Association's early-morning delivery statistics and Statistics Finland's

previously compiled statistics, it can be estimated that some three-quarters of the delivery or around 530 million newspapers were delivered during the early-morning delivery. This translated to approximately one per cent decline from 2009. The remaining newspapers, around 170 million items, were delivered during the daytime. Thus, the drop in the daytime delivery volume of newspapers was around 2 per cent, which was greater than that of early-morning deliveries.

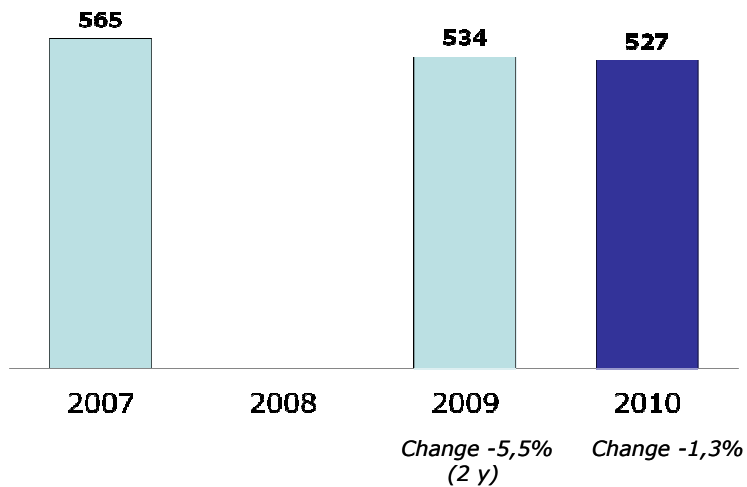


Figure 15. Total volumes of early-morning newspaper deliveries between 2007 and 2010 (in millions of items). (Research conducted by: Nordic Adviser Group, 2009–10; Statistics Finland, 2007–08.)

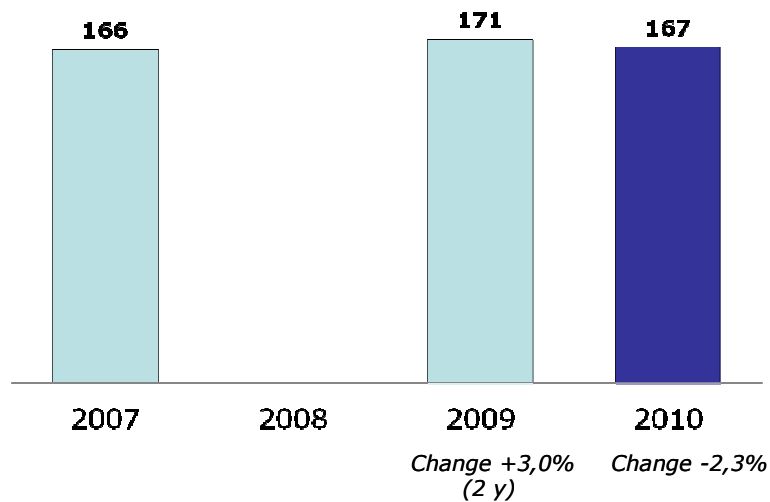


Figure 16. Total volumes of daytime newspaper delivery between 2007 and 2010 (in millions of items). (Research conducted by: Nordic Adviser Group, 2009–10; Statistics Finland, 2007–08.)

The operators' responses regarding the turnover of magazine and newspaper delivery were partially incomplete, so the turnover of some operators was estimated. This was performed by extrapolating from the information of companies that reported their turnover figures by delivery product. The average delivery price (VAT 0 %) of these delivery organisations came to around EUR 0.30 per magazine/newspaper. Applying the same average delivery price to those companies that did not report their information yields a total early-morning delivery market size of around EUR 154 million.

In Statistics Finland's data on postal and small transportation operations for 2007, the unit price for daytime delivery of newspapers was around EUR 0.20 per item, while the unit price for magazine delivery was around EUR 0.27 per item. A calculation that uses the figures adjusted in accordance with the price changes of some operators yields an estimated daytime delivery market size of around EUR 35 million and an estimated magazine delivery market size of around EUR 110 million. The entire magazine and newspaper delivery market amounted to around EUR 290 million. Thus, the turnover of the entire magazine and newspaper delivery market dropped by around 5 per cent from 2009. The largest decline of around 8 per cent was experienced in magazine turnover. This was primarily caused by a decrease in delivery volumes, as noted above. According to the estimate, the turnover of the daytime delivery of newspapers dropped by 3.2 per cent, while the turnover of early-morning delivery dropped by 3.6 per cent.

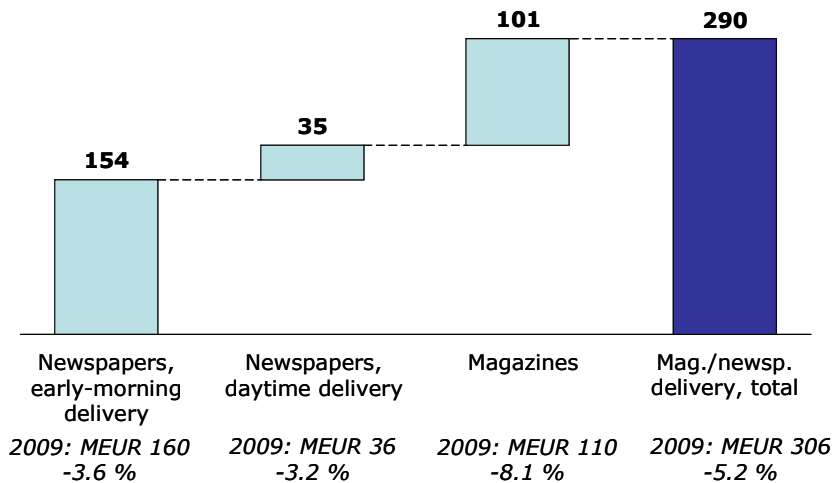


Figure 17. Turnover of the magazine and newspaper delivery market in 2010 (EUR million)

Table 8 shows a summary of the development over the last three years of the volumes of magazine and newspaper deliveries and the turnover generated by this.

	Volume 2008 (million items)	Volume 2009 (million items)	Volume 2010 (million items)	Turnover 2008 (EUR million)	Turnover 2009 (EUR million)	Turnover 2010 (EUR million)
Newspapers early-morning delivery		534	527	N/A	160	154
Newspapers daytime delivery	Total 715	171	167	N/A	36	35
Magazines	347	370	339	N/A	110	101
<b>Newspaper and magazine delivery, total</b>	<b>1,062</b>	<b>1,075</b>	<b>1,033</b>	<b>N/A</b>	<b>306</b>	<b>290</b>

Table 8. The development of the volumes of magazine and newspaper deliveries and the turnover generated by this between 2008 and 2010.

## 6. Unaddressed delivery

### 6.1 Operators in the market

Unaddressed delivery means the delivery of unaddressed direct marketing mail such as discount leaflets, brochures and freesheets. There are two large operators in the unaddressed postal delivery services market: Itella Corporation and a group of companies operating under the name Suomen Suoramainonta (SSM Jakeluryhmä). Itella delivers unaddressed mail throughout the country during the daytime delivery of letter mail. SSM Jakeluryhmä comprises a group of regional companies that deliver local newspapers and advertisements in their regions. Most SSM Jakeluryhmä companies are owned by Janton Oyj. The group comprises a total of 52 regional companies across Finland, including the Helsinki Metropolitan Area, Tampere, Turku, Jyväskylä and Lahti. Some of the delivery organisations owned by newspapers also deliver unaddressed mail during the early-morning delivery of newspapers.

Registered associations such as sports clubs and partnership companies also provide unaddressed delivery services in Finland. Since information on these operators is scarce and their proportion of the entire market is very small, they were excluded from the survey.

### 6.2 Market development in 2010

According to the survey, the respondents' item volumes related to unaddressed delivery in 2010 amounted to a total of 1,923 million items. Itella and SSM Jakeluryhmä accounted for well over 95 per cent of this. This figure represented an increase of over 3 per cent year on year, which means that the steady growth in the volume of unaddressed delivery continued.

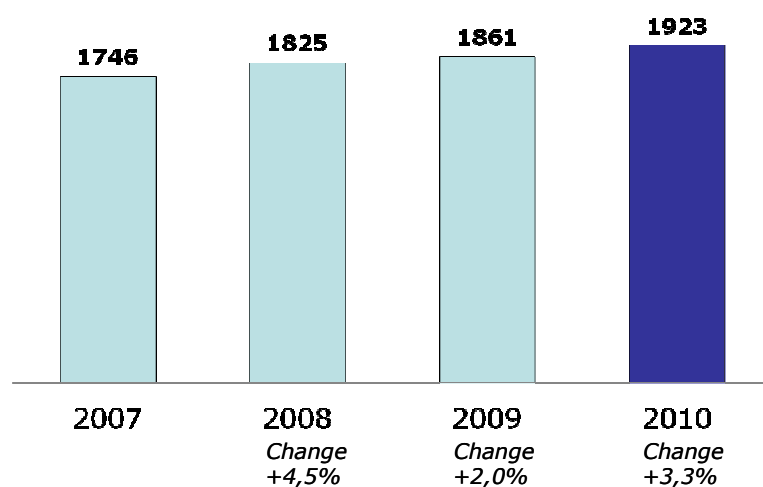


Figure 18. Total volumes of unaddressed delivery between 2007 and 2010 (in millions of items). (Research conducted by: Nordic Adviser Group, 2009–10; Statistics Finland, 2007–08.)

The unaddressed delivery market's size could not be accurately determined financially, since the turnover information in the responses provided was insufficient. However, an estimate of the market's size in euros could be provided by extrapolating from the average delivery price (VAT 0 %) of those unaddressed delivery operators that reported their information accurately. This method yielded a total market size of EUR 85 million. This means that the market's size remained the same despite the increase in volume. Thus, the unit-specific delivery price saw a slight drop in 2010.

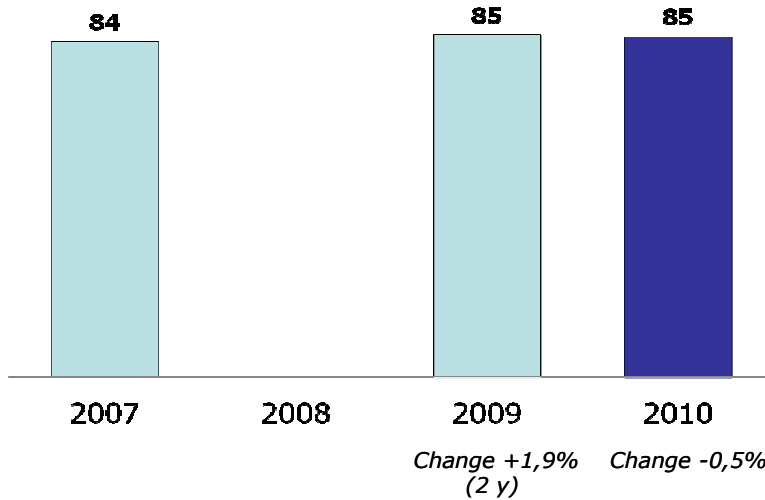


Figure 19. Turnover of the unaddressed delivery market in 2007, 2009 and 2010. (Research conducted by: Nordic Adviser Group, 2009–10; Statistics Finland, 2007–08.)

Table 9 shows a summary of the development over the last three years of unaddressed delivery volumes and their turnover.

	Volume 2008 (million items)	Volume 2009 (million items)	Volume 2010 (million items)	Turnover 2008 (EUR million)	Turnover 2009 (EUR million)	Turnover 2010 (EUR million)
<b>Unaddressed delivery</b>	1 825	1 861	1 923	N/A	85	85

Table 9. The development of the volumes of unaddressed delivery and the turnover generated between 2008 and 2010.

## 7. Pricing of parcel delivery services

The questionnaire also asked parcel delivery companies to provide a price for four different deliveries: a 3 kg parcel or a 20 kg parcel, sent from central Oulu to central Helsinki (door-to-door), and vice versa. Price information was obtained from eleven parcel delivery companies in all.

Figure 20 shows the highest, lowest and median prices for a 3 kg parcel sent door-to-door from central Oulu to central Helsinki. Both the lowest and highest prices had seen a slight increase on the previous year, whereas the median price had remained more or less the same, increasing by just a few percentage points. The great differences in the comparison were caused by the different delivery methods used by the companies. The highest prices were reported by companies that offered the fastest delivery times by means of, for instance, air freight. Conversely, the companies that reported the lowest prices used overland delivery.

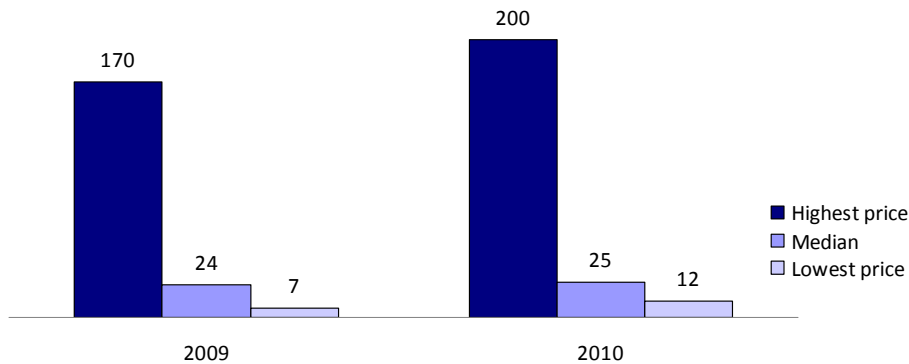


Figure 20. Price comparison for a 3 kg addressed parcel from Oulu to Helsinki (EUR).

Similarly, Figure 21 shows the prices for a 3 kg parcel from central Helsinki to central Oulu. The prices are similar to those going in the opposite direction. The slight difference in prices in the cheapest category that was seen in 2009 has disappeared. However, in terms of the median price, it is still slightly less expensive to send parcels from Oulu to Helsinki than vice versa. This is in all likelihood due to higher demand for transport space for deliveries from Helsinki to Oulu.

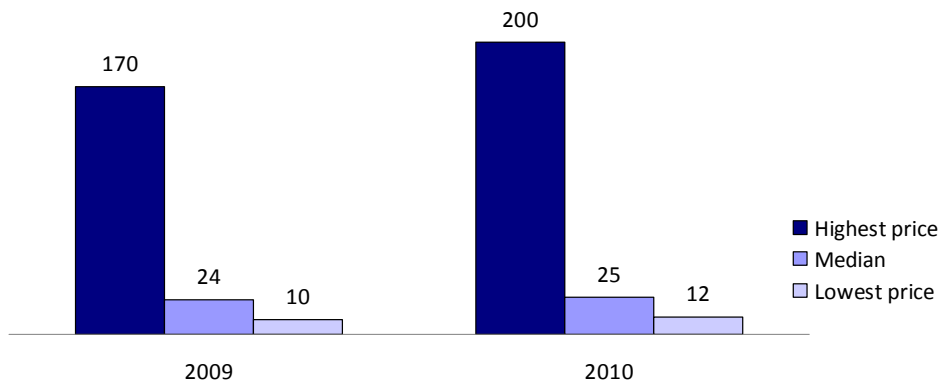


Figure 21. Price comparison for a 3 kg addressed parcel from Helsinki to Oulu (EUR).

Figure 22 shows a corresponding price comparison for 20 kg parcels from Oulu to Helsinki. The highest price went down slightly from the previous year, whereas the

lowest price went up. These changes are probably due to variation among the companies that responded to the question. The median price remained at the previous year's level.

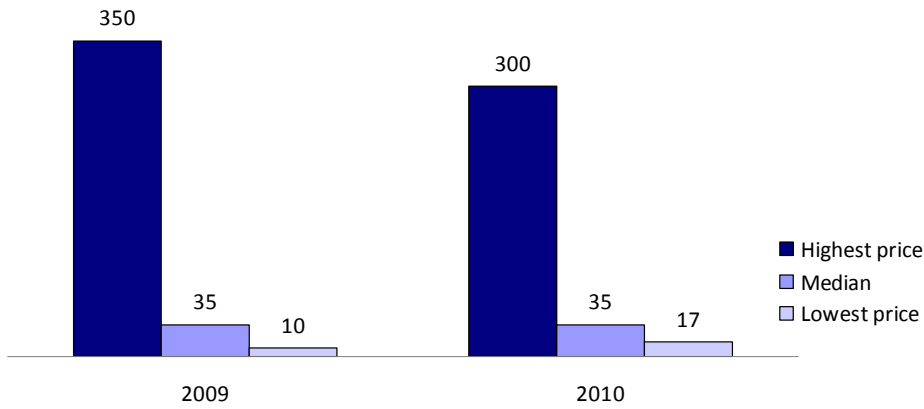


Figure 22. Price comparison for a 20 kg addressed parcel from Oulu to Helsinki (EUR).

Figure 23 shows a price comparison for 20 kg addressed parcels from Helsinki to Oulu. The figures are more or less the same than those for the opposite direction. The lowest price shows a small price difference. Like the median prices, this reinforces the view that the prices from Oulu to Helsinki are slightly lower than for the opposite direction.

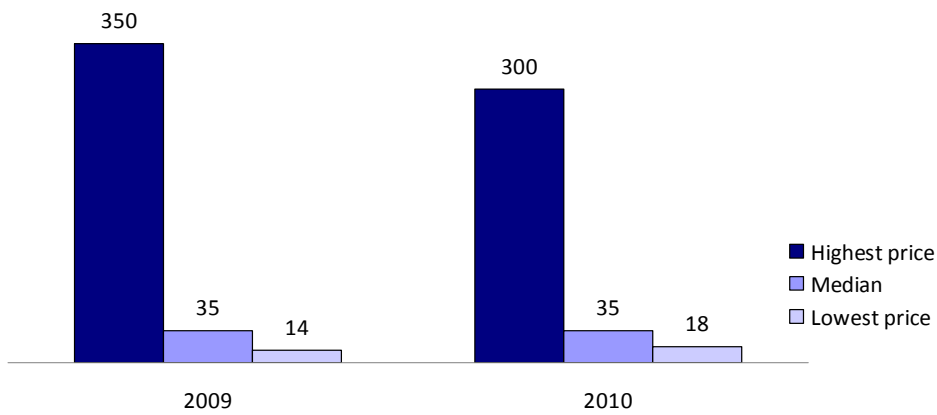


Figure 23. Price comparison for a 20 kg addressed parcel from Helsinki to Oulu (EUR).

## APPENDIX 1: The questionnaire

### Survey on postal and small delivery services, 2010

This questionnaire applies to the period between 1 January 2010 and 31 December 2010.

In the case of a group of companies, we would like you to report on your group's combined figures regarding postal and small deliveries in a format in which any possible internal overlap within the group has been eliminated from the figures. You can specify the group companies to which your responses apply in Section 1.2.

If you are unable to provide specific information for all sections, your best estimate will suffice.

Please ignore the sections that do not apply to your company.

#### 1. Basic information

1.1. Company \_\_\_\_\_

1.2. Possible subsidiaries \_\_\_\_\_

1.3. Business ID \_\_\_\_\_

1.4. Respondent's name \_\_\_\_\_

1.5. Respondent's email \_\_\_\_\_

1.6. Respondent's phone number \_\_\_\_\_

1.7. Number of personnel related to postal and small delivery services in Finland (average for the year/financial period) \_\_\_\_\_

1.8. Do you offer nationwide delivery?

( ) Yes

( ) No;

Specify \_\_\_\_\_

1.9. Number of your delivery-related facilities in Finland \_\_\_\_\_

1.10. Your primary delivery partners in Finland \_\_\_\_\_

Further information:

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**2. Letter mail (under 2 kg), addressed delivery**

2.1. Domestic letter items (under 2 kg), addressed delivery

Quantity (items): \_\_\_\_\_

Turnover (VAT 0%, EUR): \_\_\_\_\_

2.2. Letter items to international addresses (under 2 kg)

Quantity (items): \_\_\_\_\_

Turnover (VAT 0%, EUR): \_\_\_\_\_

2.3. Letter items from abroad (under 2 kg)

Quantity (items): \_\_\_\_\_

Turnover (VAT 0%, EUR): \_\_\_\_\_

2.4 Please estimate the proportion of letter items delivered by your company that travel through the network of Itella/Finland Post or other companies at some point (%):

\_\_\_\_\_

2.5. Do you offer a registered mail service for letters sent through your company?

Yes

No

2.6. Do you offer an insurance service for letters sent through your company?

Yes

No

Further information:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**3. Parcel delivery (shipments of goods)**

3.1 Domestic parcel delivery, 0-10 kg

Quantity (items): \_\_\_\_\_

Turnover (VAT 0%, EUR): \_\_\_\_\_

3.2 Domestic parcel delivery, 10-50 kg

Quantity (items): \_\_\_\_\_

Turnover (VAT 0%, EUR): \_\_\_\_\_

3.3. Parcel delivery to international addresses, 0-50 kg

Quantity (items): \_\_\_\_\_

Turnover (VAT 0%, EUR): \_\_\_\_\_

3.4. Parcel delivery from abroad, 0-50 kg

Quantity (items): \_\_\_\_\_

Turnover (VAT 0%, EUR): \_\_\_\_\_

2.4 Estimate the proportion of 0-10 kg domestic parcel items delivered by your company that travel through the networks of Itella/Finland Post or other companies (%):

\_\_\_\_\_

2.4 Estimate the proportion of 10-50 kg domestic parcel items delivered by your company that travel through the network of Itella/Finland Post or other companies (%):

\_\_\_\_\_

2.5. Do you offer a registered mail service for parcel items weighing less than 10 kg that are sent through your company?

Yes

No

2.5. Do you offer an insurance service for parcel items weighing less than 10 kg that are sent through your company?

Yes

No

Further information:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**4. Unaddressed delivery, magazine and newspaper delivery**

4.1 Domestic unaddressed delivery

Quantity (items): \_\_\_\_\_

Turnover (VAT 0%, EUR): \_\_\_\_\_

4.2. Domestic early-morning delivery of newspapers and local newspapers

Quantity (items): \_\_\_\_\_

Turnover (VAT 0%, EUR): \_\_\_\_\_

4.3. Domestic daytime delivery of newspapers and local newspapers

Quantity (items): \_\_\_\_\_

Turnover (VAT 0%, EUR): \_\_\_\_\_

4.4 Domestic delivery of magazines

Quantity (items): \_\_\_\_\_

Turnover (VAT 0%, EUR): \_\_\_\_\_

4.5 Estimate the proportion of unaddressed items, magazines and newspapers delivered by your company that travel through the network of Itella/Finland Post or other companies (%):

Unaddressed delivery \_\_\_\_\_

Newspapers and local newspapers, early-morning delivery \_\_\_\_\_

Newspapers and local newspapers, daytime delivery \_\_\_\_\_

Magazine delivery \_\_\_\_\_

Further information:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## 5. Parcel pricing

### 5.1 Parcel pricing

Estimate the average total price for the following services, if your company offers these delivery services (EUR):

1) Addressed 3 kg parcel from central Oulu to central Helsinki (door-to-door).

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2) Addressed 3 kg parcel from central Helsinki to central Oulu (door-to-door).

---

3) Addressed 20 kg parcel from central Oulu to central Helsinki (door-to-door).

---

4) Addressed 20 kg parcel from central Helsinki to central Oulu (door-to-door).

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Add your own comments:

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Thank you for your responses!

Please click the Submit button to complete the questionnaire.

## APPENDIX 2: A list of the companies to which the questionnaire was sent

AB AHLSSKOG TRANSPORT - KULJETUS OY  
ACTION LÄHETIT OY  
AGOPALVELU OY  
ALMA MANU OY  
AREPA OY  
ASAPPI OY  
ASIOINTIPALVELU PIKALÄHETTI P.  
RAUTIAINEN OY  
BRING EXPRESS SUOMI OY  
CITY MAIL SERVICE HELSINKI OY  
CITYCARD OY  
CITYPRESS OY  
DHL EXPRESS FINLAND OY  
ESA JAKELUT OY  
ETELÄ-SUOMEN PIKAKULJETUS OY  
EXPRESS WHEELS OY  
FAST SERVICE EKI'S OY  
FEDEX EXPRESS OY  
FINNAIR CARGO OY  
GLS FINLAND OY  
HEL-SERVICE OY  
HELSINGIN JAKELU-EXPERT OY  
HELSINGIN KTK OY  
HELSINGIN LÄHIJAKELU OY  
HH PIKAKULJETUS OY  
HRX FINLAND OY  
HÄMEEN KULJETUS OY  
HÄRMÄN KURIIRI OY  
ILVES JAKELU OY  
INFLIGHT MEDIA FINLAND OY  
ITELLA CORPORATION  
JAKELUJUNIORIT OY  
JAKELUKULMA OY  
JAKELUMASTERS OY  
JAKELUSUORA OY  
JAKELU-ÄSSÄT OY  
JANTERNET OY  
JETPAK FINLAND OY  
J.N.S. COMPANY OY  
JKK EXPRESS OY  
JOENSUUN YKKOSJAKELUT OY  
JONNA PARKKARI OY  
JYVÄSKYLÄN JAKELUT OY (JAKELUPORRAS)  
KAINUUN KURIIRI OY  
KARJAAN OFFSETPAINO  
KARJALAINEN  
KAUKOKIITO OY  
KOSKIJAKELUT OY  
KTK OY  
KULJETUS METSÄ OY  
KULJETUS P. RISTOLAINEN OY  
KULJETUS VÄLIMAA OY  
KULJETUSLIIKE EPÄK OY  
KULJETUSLIIKE M. OSALA OY  
KULJETUSLIIKE MUSTAPÄÄ OY  
KULJETUSLIIKE RÄIHÄ OY  
KULJETUSPALVELU FÄGEL OY  
KUOPION LÄHETTIPALVELU OY  
KUOPION KURIIRIPALVELU OY  
KURIIRIPALVELUT JY - PE OY  
KYRÖNMAAN LÄHETTIPALVELU OY  
KYTÖNEN  
KÄRKIJAKELU OY  
LAHDEN JAKELUT OY  
LB MARKETING AND HOLDINGS OY  
LK JAKELU OY  
LÄHETIX OY  
LÄHETTIPALVELU ESAYWAY OY  
LÄHETTIPALVELU PORIN NOPEA OY  
LÄHETTIPALVELU T. MÖLSÄ OY  
LÄHETTIPALVELU TURUN REDLINE OY  
LÄHETTIPALVELU VAINIO OY  
LÄHETTIRENGAS OY  
LÄHETTIYKKONEN OY (HHH Saari Group)  
LÄNSI-SAVO-KONSERNI  
LÄNSI-SUOMI YHTYMÄ OY  
LÄNSI-UUDENMAAN MAINOSJAKELU OY  
MAILCO OY  
MATKAHUOLTO OY AB  
MT-KULJETUS OY  
MÖNKIJÄ-LÄHETIT OY  
NAPAPIIRIN KULJETUS OY  
NEWSPAPER EXPRESS FINLAND OY  
OPSET OY  
OULUN AUTOKULJETUS OY  
OULUN JAKELUTOIMISTO OY  
OULUN KURIIRI  
OULU-SUORAJAKELU OY  
OY KUEHNE-NAGEL LTD  
PASI-JAKELUT OY  
PAUMAT OY  
PEX LOGISTICS  
PICCOLO GROUP OY  
PIKKUAHO OY  
PIRKAN NOPEA OY  
POHJOLAN PIKALÄHETIT KY  
PORIN JAKELUKESKUS OY  
PORVOON MEDIAJAKELU OY  
POSTEN LOGISTIK SCM OY (DPD Finland Oy)  
POSTEN ÅLAND  
POSTI KUSTI OY  
POSTIPATE OY  
PRO MAIL OY  
PÄLKÄNEEN LEIPÄMARKKINOINTI OY  
QUICK X-PRESS FINLAND OY  
RAIJARIT OY  
RAUTAKIRJA LTD  
SALO-SUORAJAKELU OY  
SAVON JAKELU OY  
SAVOTRANS OY

**SCHENKER CARGO OY (KIITOLINJA)**  
**SEINÄJOEN LÄHETTIKESKUS OY**  
**SEULO PALVELUT OY**  
**STAR COURIER OY**  
**SUOMEN LÄHIKAUPPA OY**  
**SUOMEN SUORAMAINONTA OY**  
**SUORA LÄHETYS OY**  
**TAMPERE EXPRESS SERVICES OY (JLH**  
**HENKILÖSTÖPALVELUT OY)**  
**TAMPEREEN YKKÖSJAKELUT OY**  
**TASSIE EXPRESS OY**  
**TAVARAKURIIRI O. NUOTTAJÄRVI OY**  
**TNT SUOMI OY**  
**TREMENDO OY**  
**TURKU-PALVELU OY**  
**TÄHTIJAKELU OY**  
**TÄHTISUORA OY**  
**UPS FINLAND OY**  
**UUTISPOSTI KY / PASI SAAJANLEHTO**  
**WASEMAC OY**  
**WHITE S OY LÄHETTIPALVELU**  
**WORLD COURIER FINLAND OY**  
**VR TRANSPPOINT OY (VR-GROUP'S LOGISTICS**  
**DIVISION)**  
**XEVOX OY**  
**YOUNG-TEAM OY**  
**ÄIJÄLÄ OY**  
*Total 133*