



Development of postal market in Lithuania

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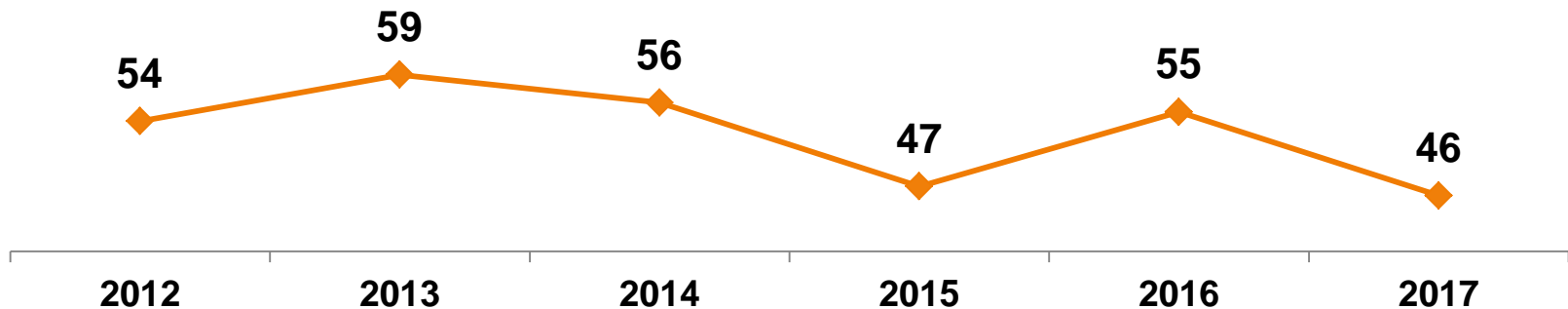
Overview of the postal sector 2017



Active service providers	46
Major service provider	AB Lietuvos paštas
Revenue, million EUR	147.1
Delivered items of correspondence, in million units	61.1
Delivered postal parcels, in million units	13.5

Postal service providers

Number of active postal service providers, in units, 2012-2017

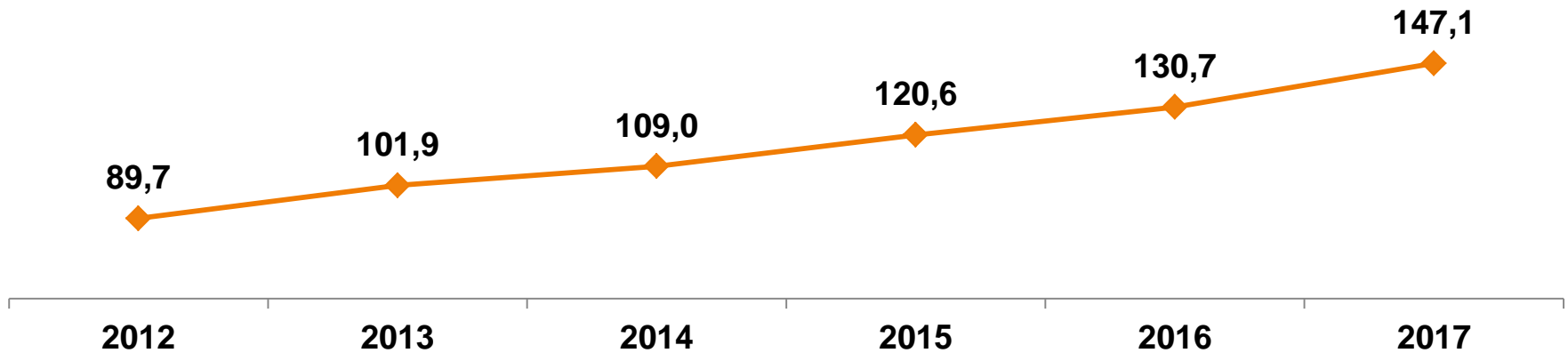


- The number of postal service providers decreases
- The number of postal service providers varies from year to year

Revenue of postal sector



Revenue of postal sector, million EUR, 2012-2017



➤ Growth rates 2017:

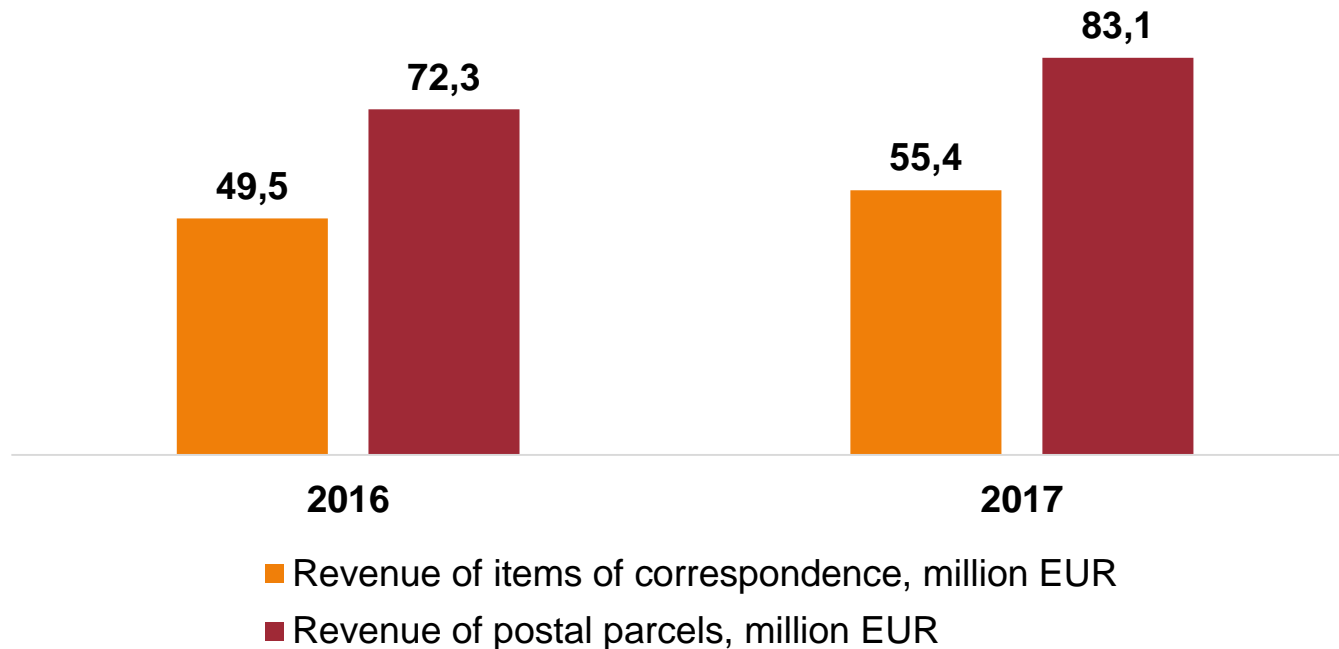
- Postal sector – 12.4 percent;
- GDP – 3.9 percent;
- E. communications sector – 3.8 percent.

➤ Structure of postal revenue:

- Parcels – 56.5 percent;
- Items of correspondence – 37.7 percent;
- Other income – 5.8 percent.

Revenue: parcels vs letters

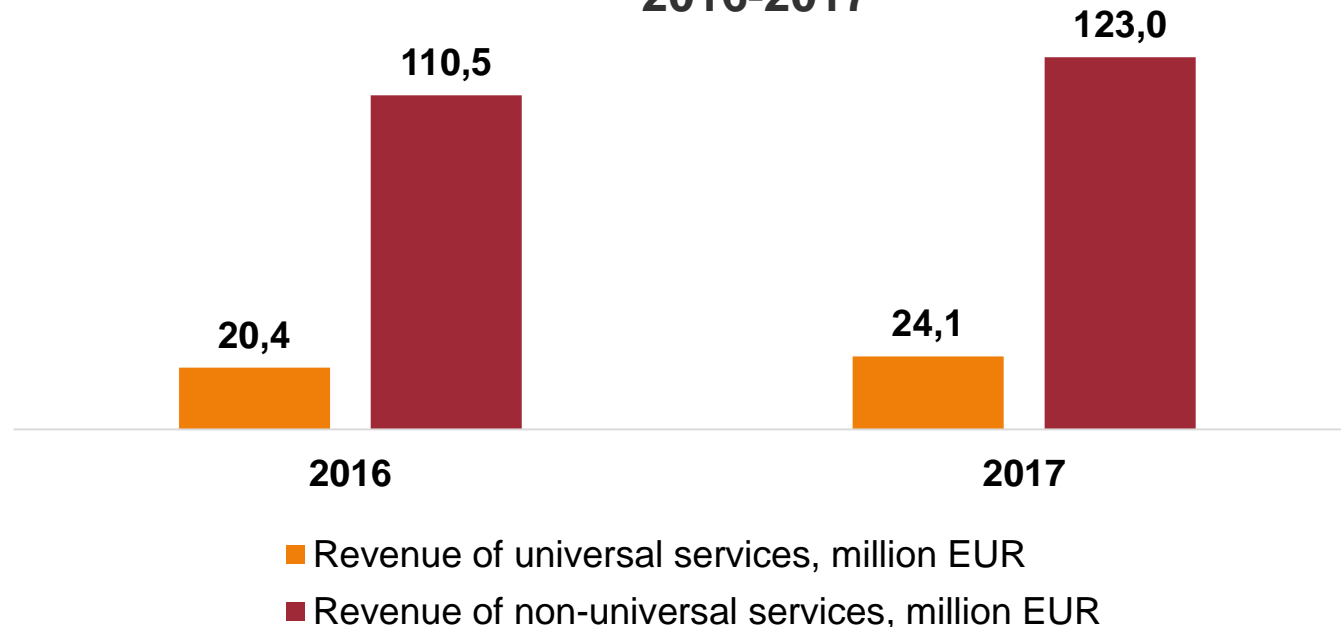
Revenue of items of correspondence and postal parcels,
million EUR, 2016-2017



- Revenue of items of correspondence increased by **11.9 percent**.
- Revenue of postal parcels increased by **14.9 percent**.

Revenue: UPS vs non-UPS

Revenue of universal and non-universal postal services, million EUR, 2016-2017

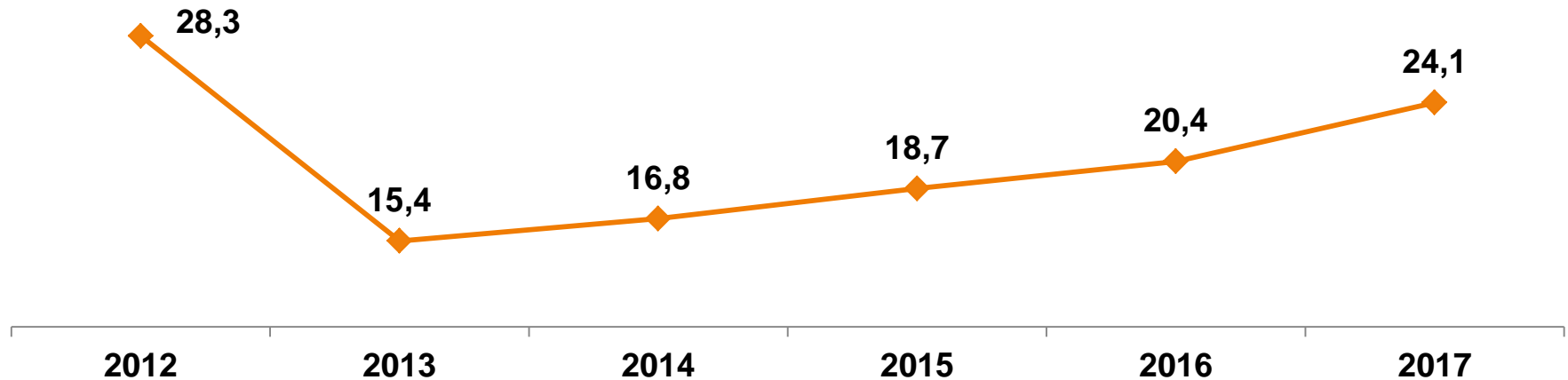


- Revenue of universal postal services increased by **18.1 percent**.
- Revenue of from non-universal postal services increased by **11.2 percent**.

Revenue of universal postal service



Revenue of UPS, million EUR, 2012-2017

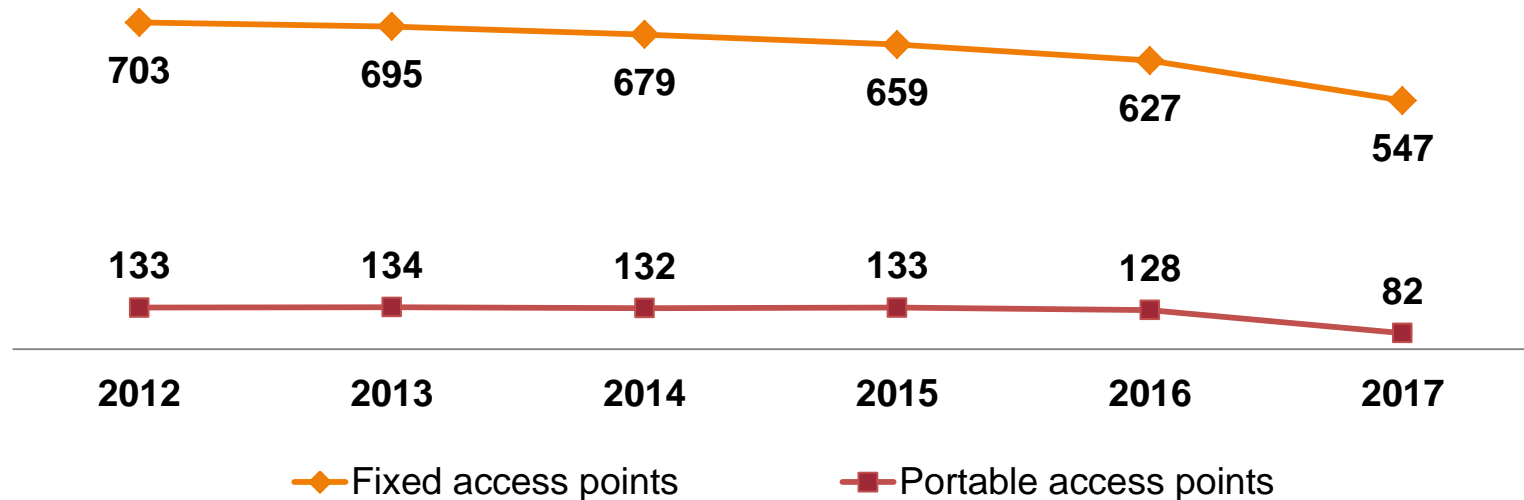


- The sole UPS provider – AB Lietuvos paštas
- Revenue has been increasing since 2013
- Revenue increased by 18.1 percent in 2017

Number of places for provision of a universal postal service



Number of places for provision of a universal postal service, in units, 2012-2017

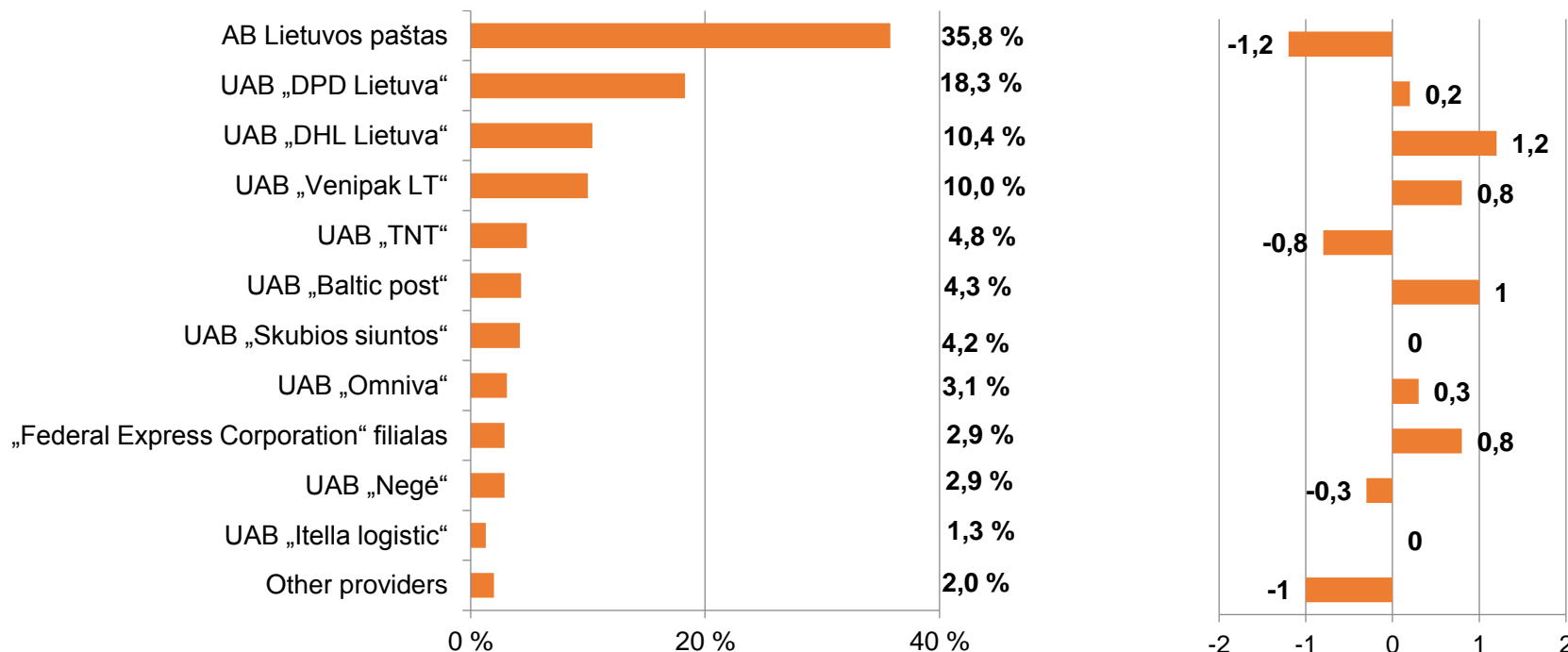


- In 2017 the number of all access points was **629**.
- In 2017 the number of all access points decreased by **16.7 percent** compared to 2016.

Market shares of the postal sector



Market shares of the postal service providers by revenue, 2017

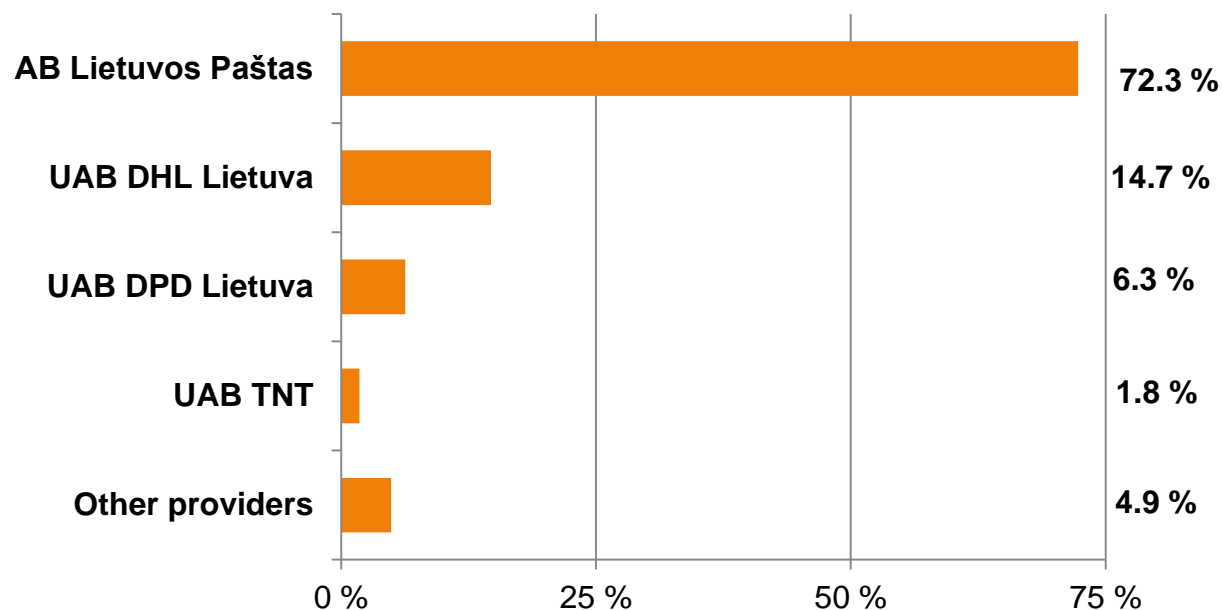


- The largest postal service provider: AB Lietuvos paštas – **35.8 percent**.
- TOP5's market share slightly increased by **0.2 percentage points**.

Market shares of the postal sector



Market shares of the postal service providers by revenue of items of correspondence, 2017

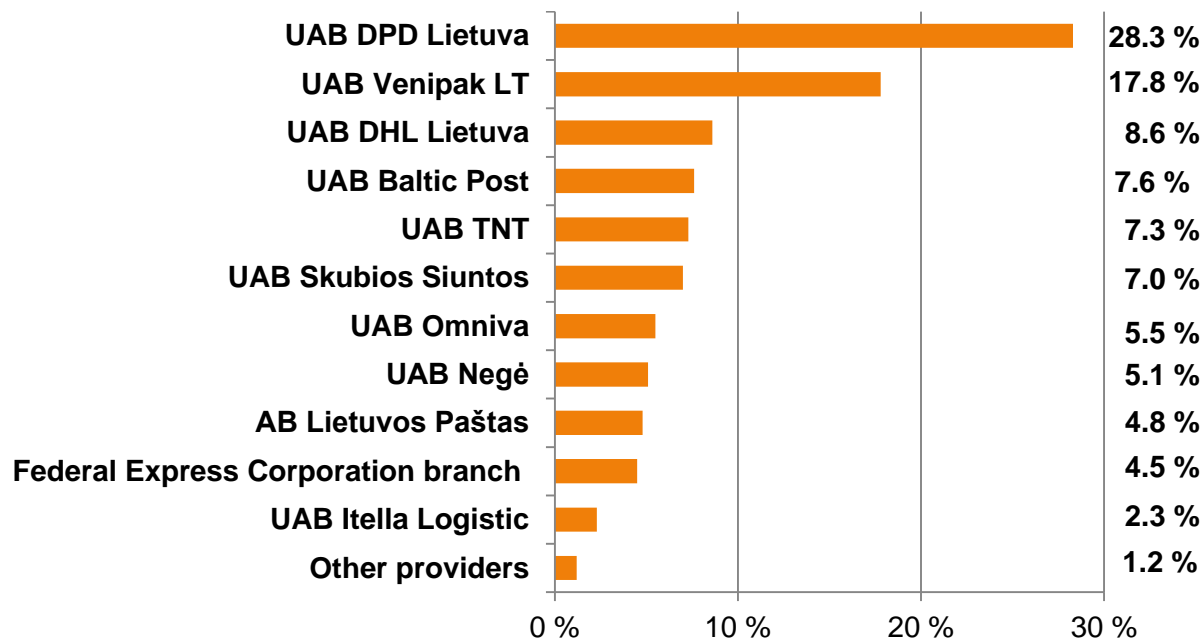


- The largest postal service provider: AB Lietuvos paštas – **72.3** percent
- Only 4 providers held market share bigger than 1 percent.

Market shares of the postal sector



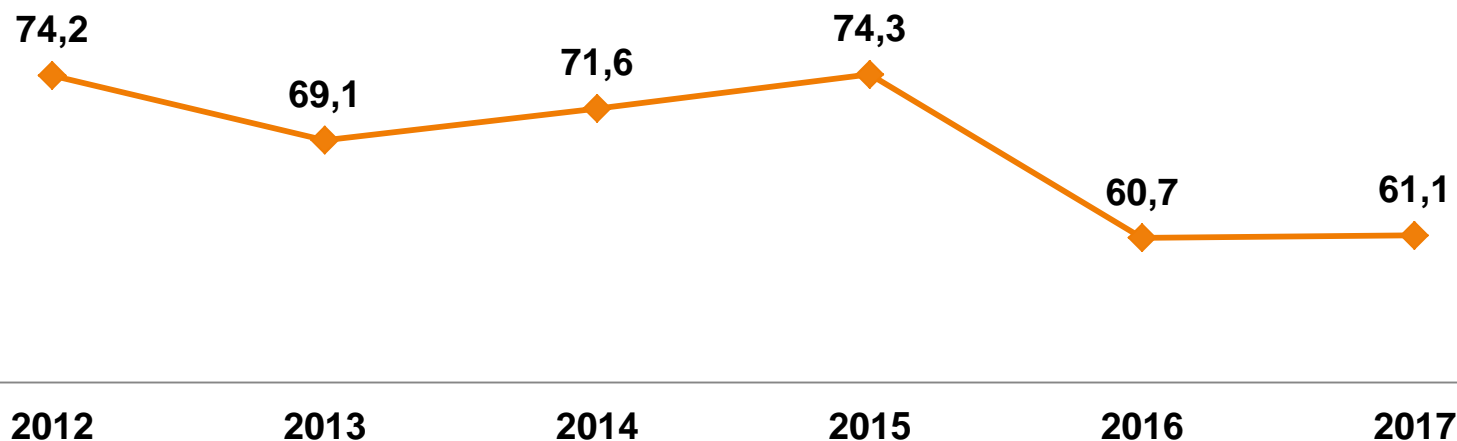
Market shares of the postal service providers by revenue of postal parcels, 2017



- The largest postal service provider: UAB DPD Lietuva – **28.3** percent
- AB Lietuvos paštas possessed only 4.8 percent

Items of correspondence

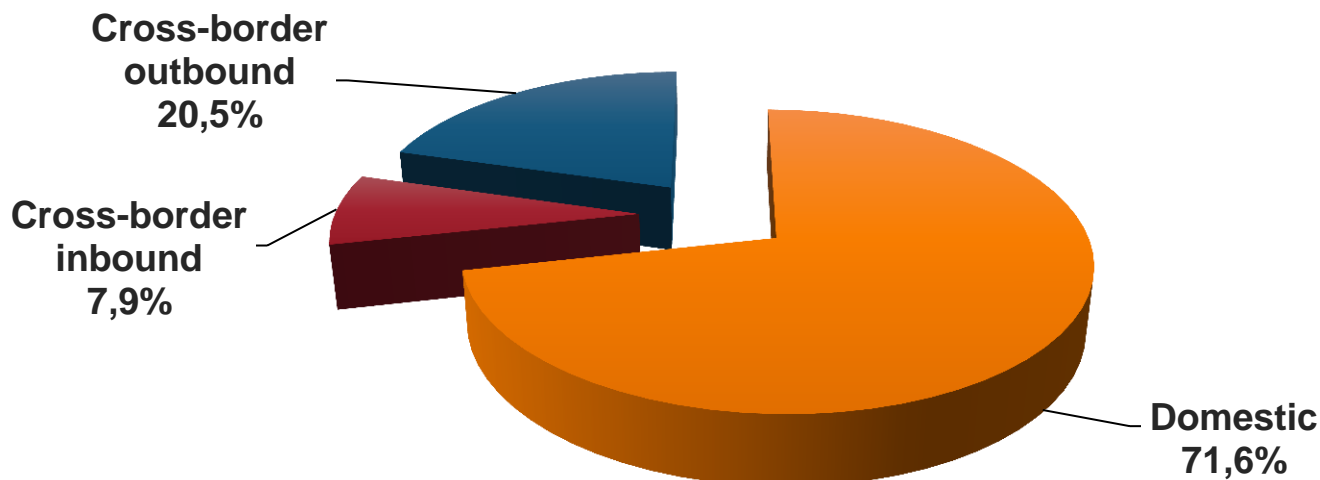
Items of correspondence, in million units, 2012-2017



- In 2017 the volume of items of correspondence slightly increased by **0.7 percent** compared to 2016;
- In 2016 the volume of items of correspondence decreased by **18.3 percent** compared to 2015.

The structure of items of correspondence

The structure of volume of items of correspondence, 2017



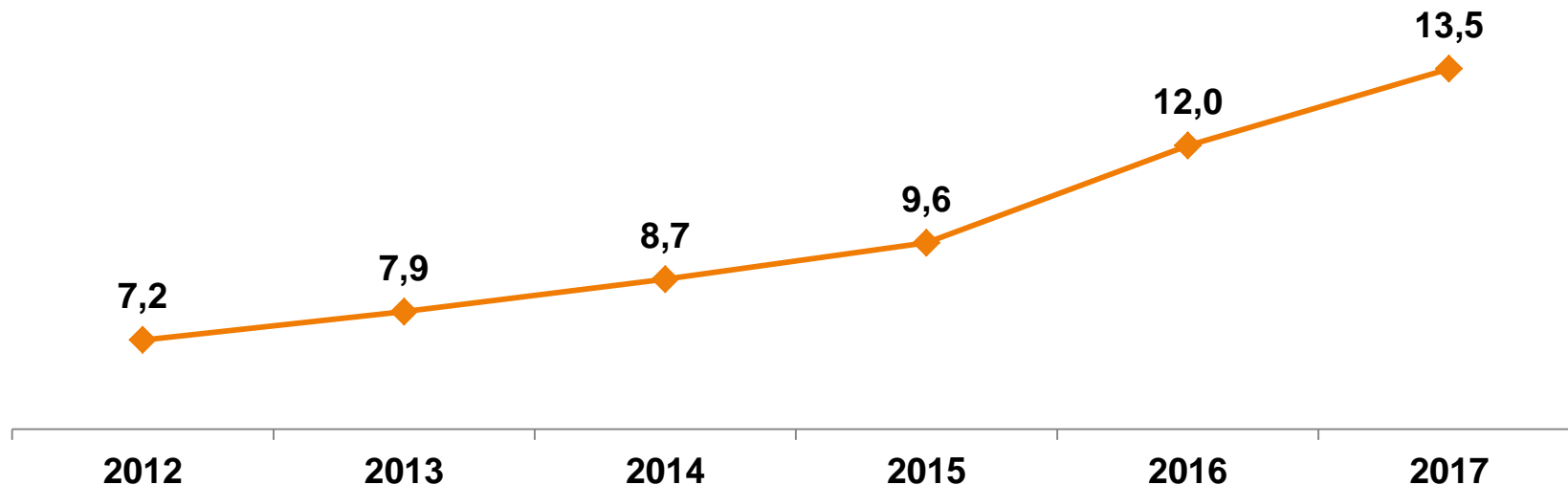
➤ In 2017 compared to 2016:

- ❑ domestic items of correspondence decreased by **1.9 p.p.**
- ❑ cross-border inbound items of correspondence decreased by **1.5 p.p.**
- ❑ cross-border outbound items of correspondence increased by **3.3 p.p.**

Postal parcels



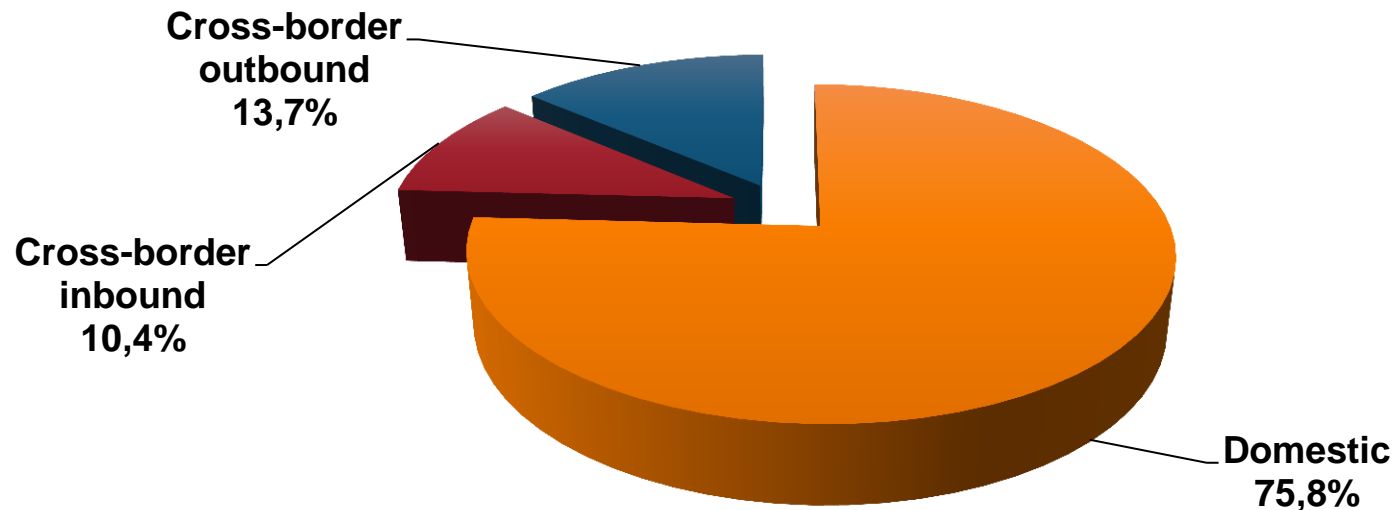
Postal parcels, in million units, 2012-2017



- In 2017 the volume of transferred postal parcels increased by **12.4 percent** compared to 2016;
- In 2016 the volume of transferred postal parcels increased by **25.0 percent** compared to 2015.

The structure of items of postal parcels

The structure of volume of postal parcels, 2017



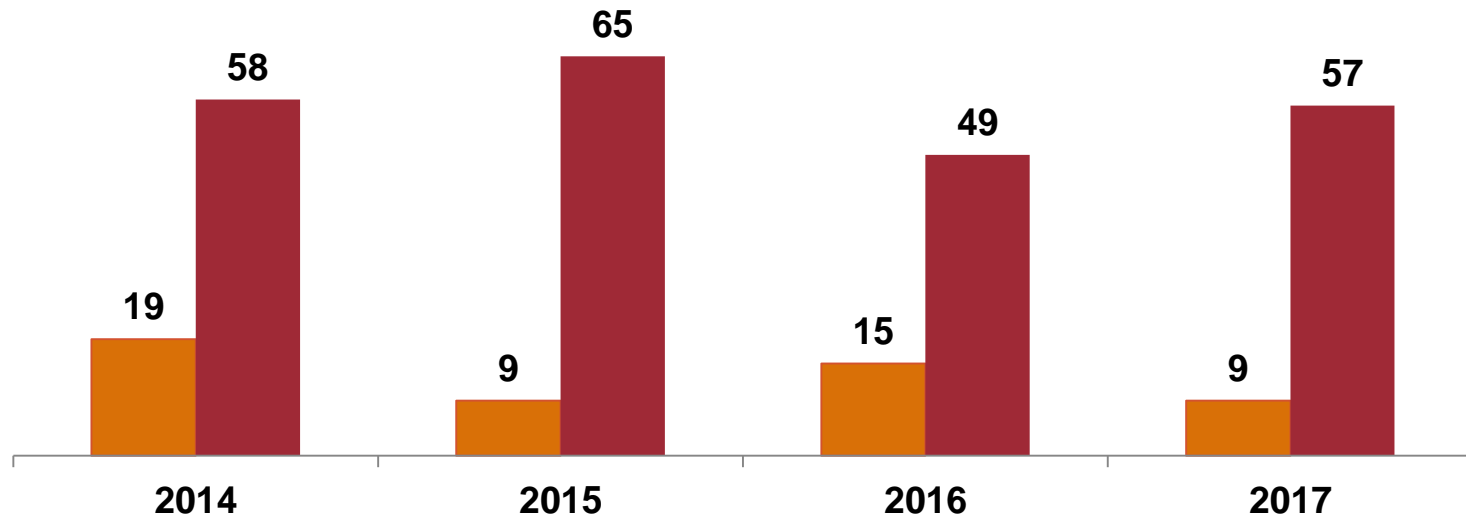
➤ In 2017 compared to 2016:

- domestic postal parcels decreased by **1.8 p.p.**
- cross-border inbound postal parcels increased by **0.7 p.p.**
- cross-border outbound postal parcels increased by **1.0 p.p.**

Number of complaints and disputes of postal service users



Number of complains and disputes received by RRT, in units, 2014-2017



- In 2017 RRT received less disputes but more complains compared to 2016
- In practice some of complains become disputes.



Thank you for your attention 😊

