



REPUBLIC OF ESTONIA
COMPETITION AUTHORITY

Development of Postal Market

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Number of Service Providers

	2014	2015	2016	2017
Universal postal service	1	1	1	1
Forwarding of ordinary, registered and insured letters	2	2	2	2
Forwarding of registered and insured parcels	1	1	1	1
Express mail	49	50	53	46
Direct mail	10	10	10	7
Forwarding of periodicals	8	8	8	6
Other*	9	9	10	7

* Other postal services include advice of delivery, money order, delivery of pensions and parcel locker services of Eesti Post Ltd. Other companies provided no service.

Revenue of Postal Services

	2013	2014	2015	2016	2017
Universal service	C	C	C	C	C
Forwarding of letters	C	C	C	C	C
Forwarding of parcels	C	C	C	C	C
Express mail	37 399 080	41 648 817	50 049 031	57 117 124	74 210 996
Direct mail	2 225 696	C	C	C	C
Forwarding of periodicals	7 737 422	C	C	C	C
Other	C	C	C	C	C
Total	76 263 670	83 172 221	102 620 215	107 109 939	126 540 386

C - confidential

Volumes of Universal Service (1)

Domestic	2013	2014	2015	2016	2017
Ordinary letter	4 167 433	4 006 127	3 415 763	2 954 531	3 012 503
Registered letter	266 021	214 307	167 103	153 038	160 940
Insured letter	492	587	671	1243	708
Registered parcel	210 115	224 875	179 329	145 403	140 765
Insured parcel	187	116	77	62	40

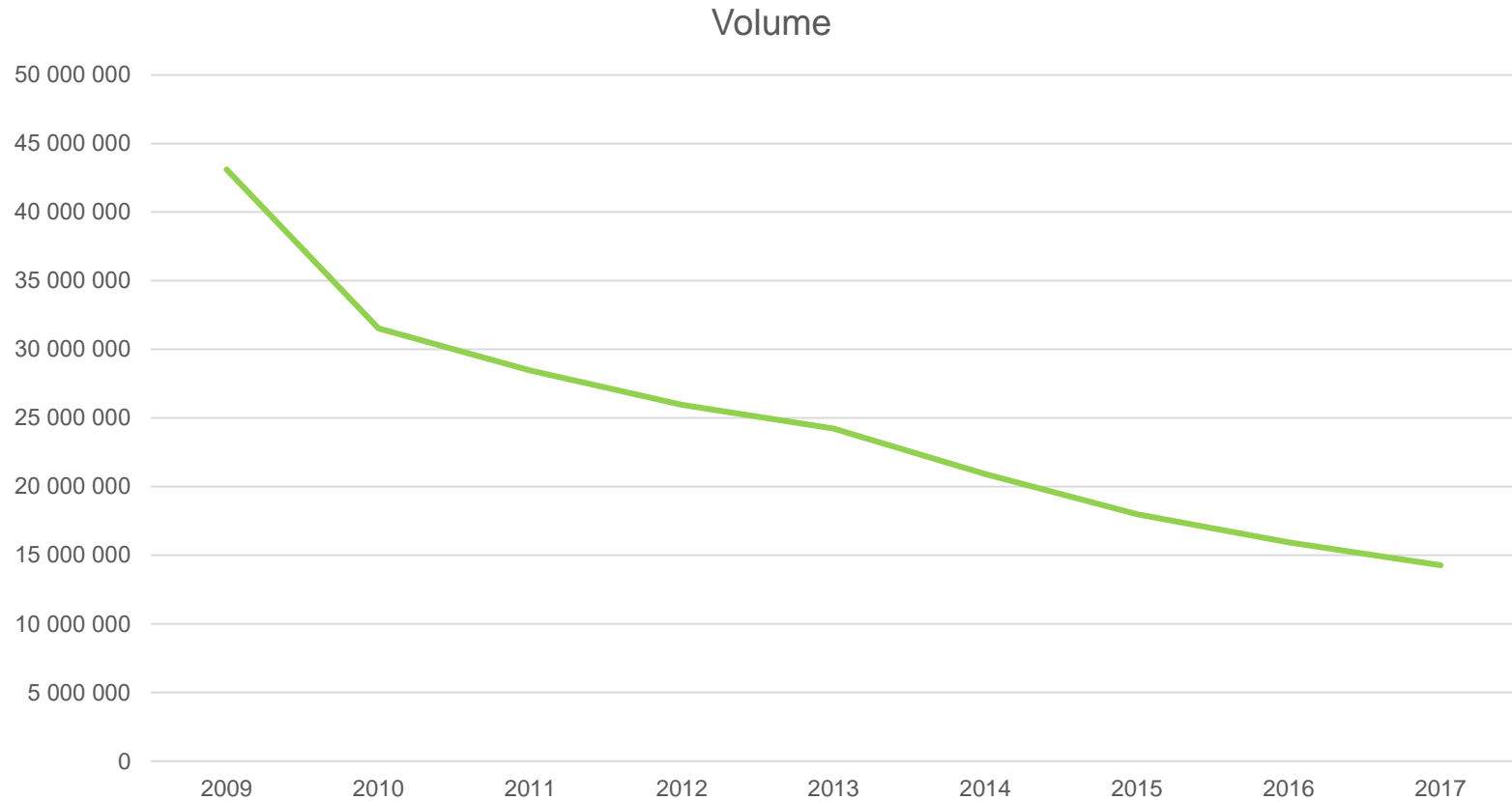
Volumes of Universal Service (2)

Cross-border	2013	2014	2015	2016	2017
Ordinary letter	4 601 747	6 486 612	5 903 191	6 566 059	6 764 580
Registered letter	888 822	1 525 101	1 377 408	1 447 468	1 922 271
Insured letter	1 622	1 469	1 436	1372	1159
Registered parcel	191 130	217 387	234 766	248 601	152 714
Insured parcel	1 920	1 781	1 851	2084	2138

Non-US Licensed Services

Only two service providers. Both of them have declared their data to be confidential since 2010.

Volume of Domestic Letters

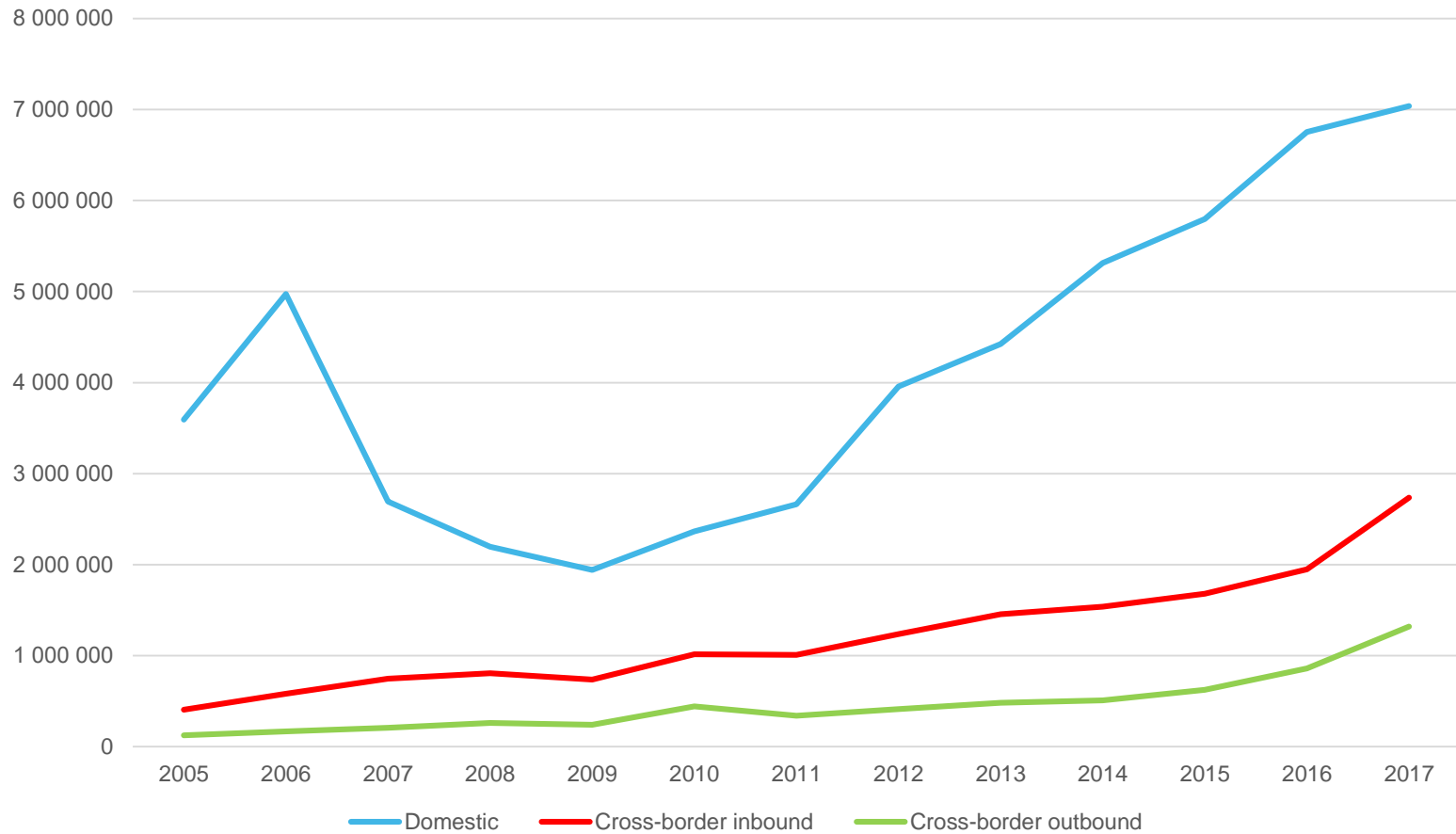


* US and non-US ordinary, registered and insured letters in total.

Volumes of Express Mail (1)

	2013	2014	2015	2016	2017
Domestic	4 422 259	5 314 744	5 798 623	6 754 306	7 040 381
Cross-border inbound	1 455 462	1 538 534	1 680 533	1 948 564	2 735 992
Cross-border outbound	481 180	508 169	624 250	858 364	1 318 753
Total	6 358 901	7 361 447	8 103 406	9 561 234	11 095 126

Volumes of Express Mail (2)



Direct Mail (1)

	2013	2014	2015	2016	2017
Revenue	2 225 696	C	C	C	C
Volume	14 242 066	C	C	C	C
Average price	0,156	0,173	0,167	0,171	0,172

C - confidential

Periodicals

6 registered providers in 2017

2 active providers in 2017

One company (USP) provides mostly in rural areas

Second company provides only in biggest towns

Overall volumes continue to decrease

Revenue is stable due to price changes

Access Points of Eesti Post

Year	Post offices	Letterboxes
2007	495	3123
2008	407	3116
2009	351	3100
2010	344	3100
2011	344	3100
2012	320	2772
2013	320	2772
2014	320	2777
2015	320	2777
2016	320	2777
2017	320	1845
2018	320	1845

Quality Results

(domestic ordinary letter D+1)

Year	UNEX	ECA
2007	90,6%	69,4%
2008	91,5%	-
2009	93,8%	81,8%
2010	92,7%	91,8%
2011	87,2%	86,2%
2012	88,8%	91,5%
2013	88,7%	85,5%
2014	88,5%	85,5%
2015	87,9%	83,2%
2016	88,6%	-
2017	85,9%	-

Universal Service Tariffs

No price change in 2018

Price increase of 10,6% (average) from 01.01.2016

Includes all services and price categories within US

Cheapest letter price from 0,55 euros to 0,65 euros

Cheapest parcel price from 3,69 euros to 3,84 euros

US has no discounts

Pricelist of US letters:

<https://www.omniva.ee/public/files/failid/hinnakiri-kiri-upt-era-est-en-2017.pdf>

Pricelist of US parcels:

<https://www.omniva.ee/public/files/failid/hinnakiri-pakk-standardpakk-era-est-en-2017.pdf>

Universal Service Fund

Current US charge rates are in force since 01.04.2014

- Ordinary letter 0,08 euros
- Registered and insured letter 0,40 euros
- All parcels 0,00 euros

The amount of universal postal service charge paid by Express Post is confidential but it is marginal compared to Eesti Post.

Eesti Post	2013	2014	2015	2016	2017
Compensation	2 282 158	2 555 033	1 299 356	1 234 164	1 567 030
US charge	3 661 707	1 688 477	1 451 237	1 296 797	1 206 319
Net compensation	-1 379 549	866 556	-151 881	-62 633	360 711

Complaints

	2013	2014	2015	2016	2017
Item lost or substantially delayed	-	16	11	20	13
Item arriving late	-	5	2	4	4
Item damaged	-	14	9	11	1
Mail delivery or collection	-	11	0	11	10
Mis-delivery	-	1	4	2	3
Access to customer service information	-	0	0	0	1
Behaviour and competence of postal personnel	-	2	0	1	0
Access to postal services	-	1	4	0	0
Other complaints	-	3	8	13	5
Total	62	53	38	62	37

Legislation

Nothing changed in 2017

Amendment of Postal Act is postponed for undefined time

Also no changes expected for secondary legislation in 2018



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Thank you!

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