

# The impact of regulation on postal import volumes

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# UPU study identified 10 shocks to international postal volumes

- five of them are of regulatory nature

**1** Covid-19  
(Feb 2020)

**2** **R!**  
New TDs  
(Jul 2020)

**3** **R!**  
Stop Act  
(Jan 2021)

**4** **R!**  
Brexit  
(Jan 2021)

**10** Recession  
risks  
(Jun 2022)

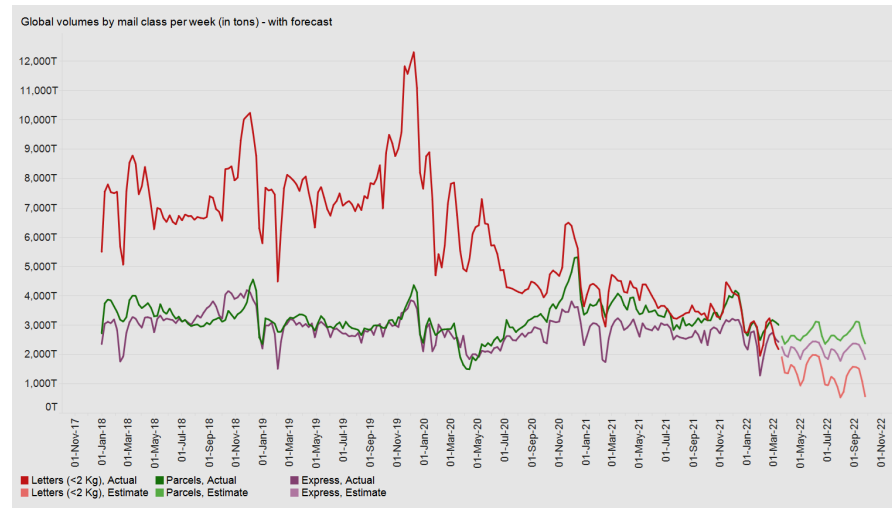
**5** **R!**  
ICS2 R1  
(Mar 2021)

**9** Inflation  
pressures  
(Apr 2022)

**8** Ukraine  
conflict  
(Feb 2022)

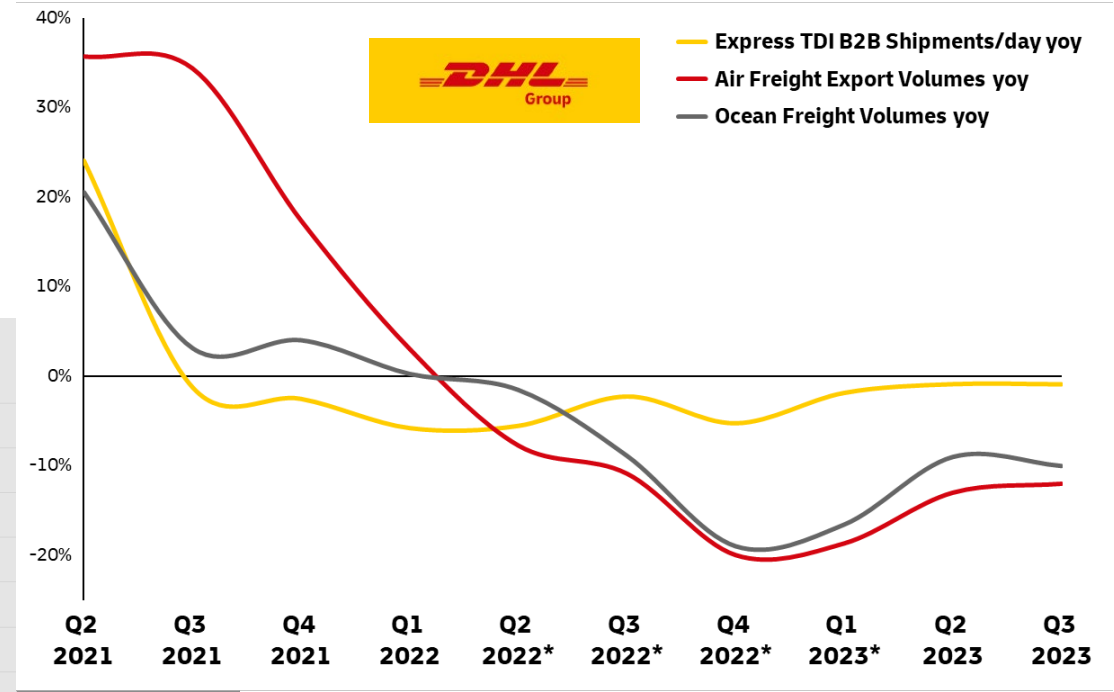
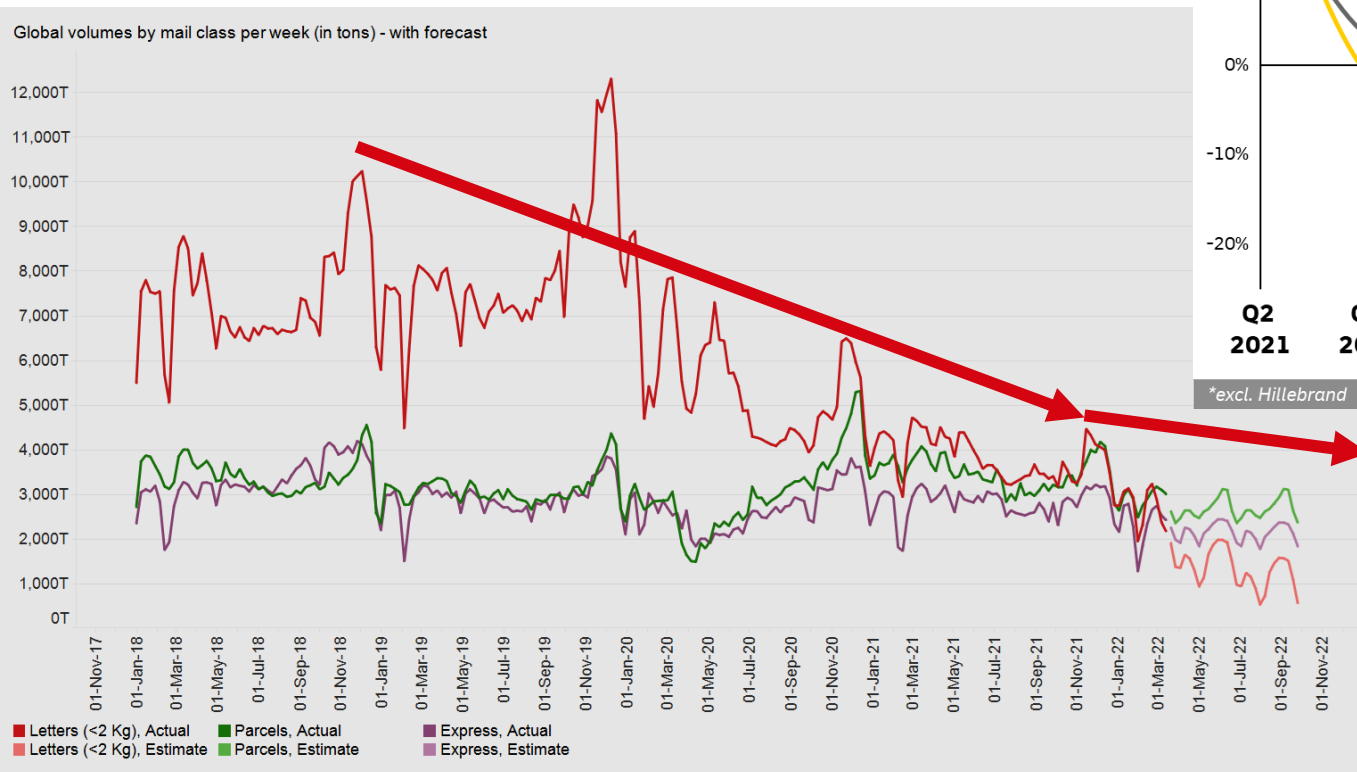
**7** End of  
pandemic  
(Jan 2022)

**6** **R!**  
EU VAT  
IOSS  
(Jul 2021)



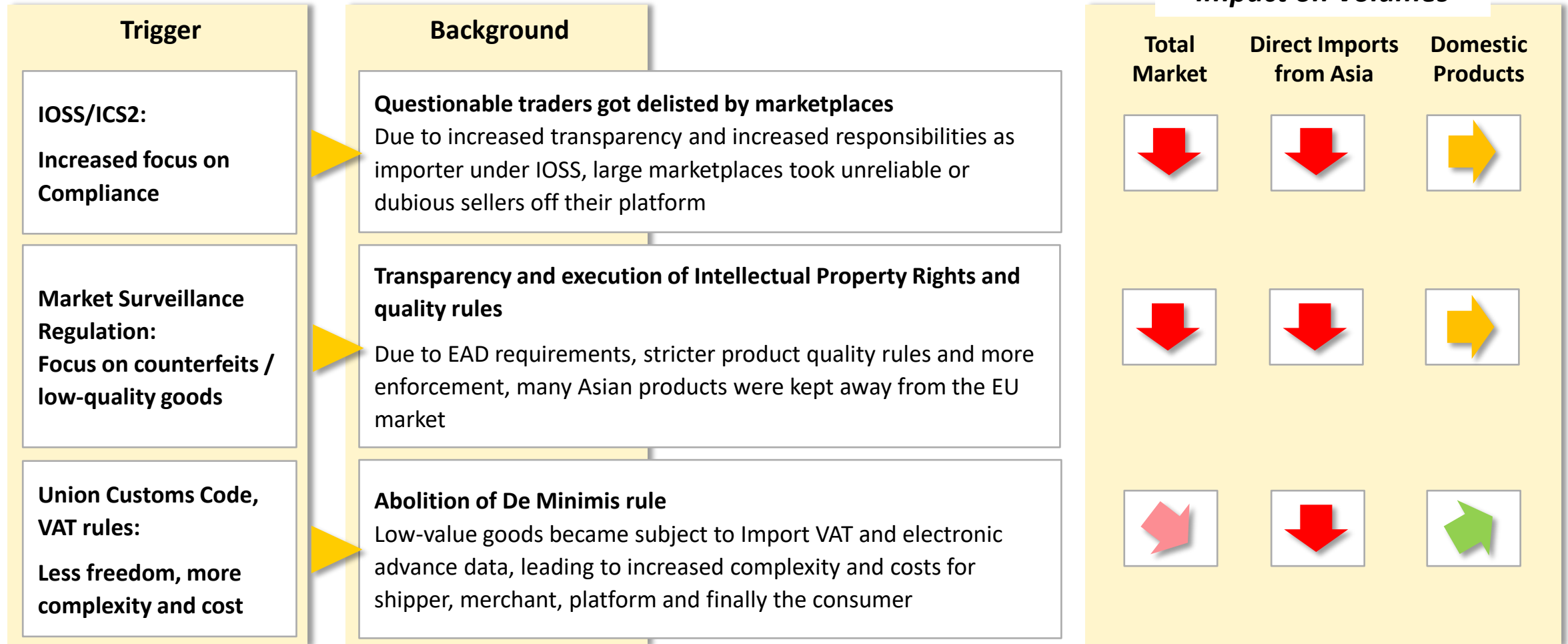
Source: UPU „State of the Postal Sector 2023”

# Shocks had a significant negative impact on international postal volumes, but have also to be viewed against similar volume indicators

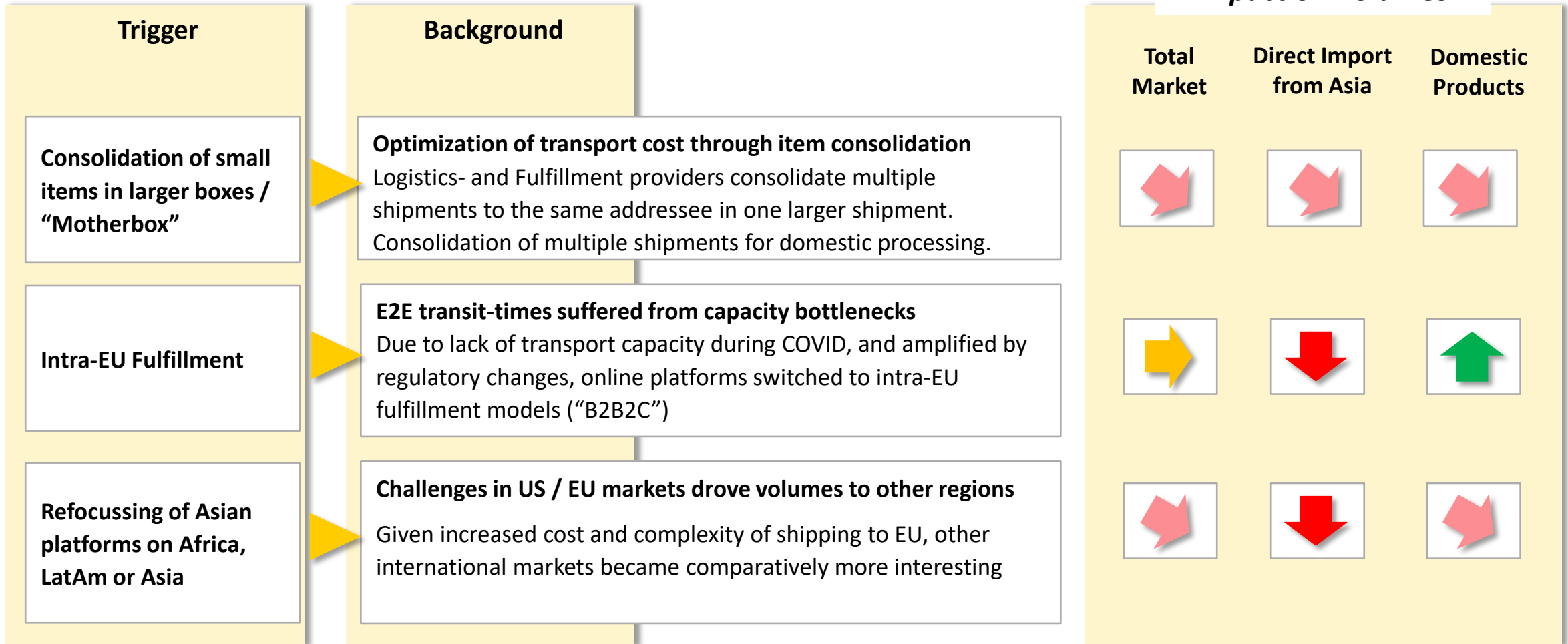


Source: UPU „State of the Postal Sector 2023”, DHL Group Q3/2023 Reporting

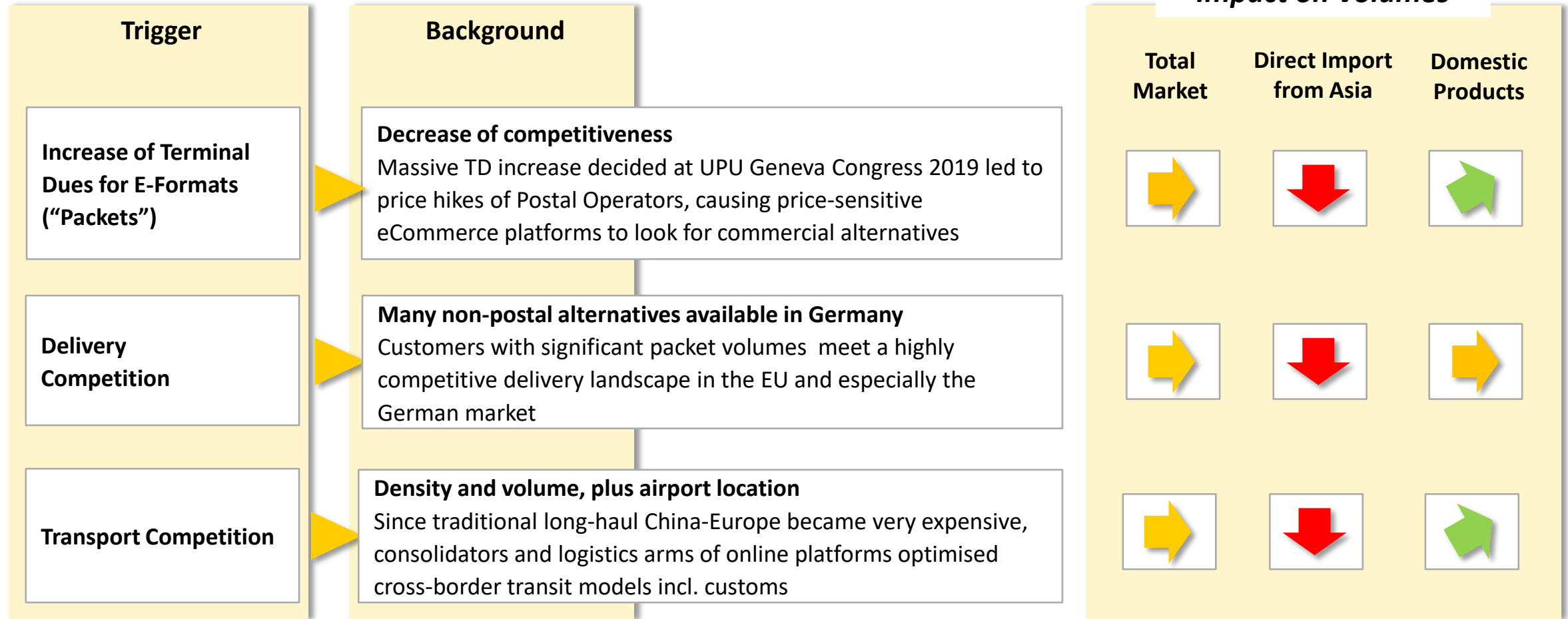
# Regulatory constraints were triggers for a collapse of postal eCommerce imports from Asia into EU



# New logistics models provided additional triggers for collapsing postal cross-border eCommerce imports from Asia into EU



# Finally, aggressive development of cost, especially of UPU Terminal Dues, supported decline of postal cross-border eCommerce imports from Asia into EU





# Lessons learned, or: How to regain postal import volumes? ("to grow where possible")

## Price

Terminal Dues and customer pricing based upon them must become more competitive

## Quality

End-to-End transit times, reliability, and processes around customs clearance and customer service to be (significantly) improved

## (Data) Compliance

Fully compliant and correct data-sets will support swift import processing and reduce costs

# Back-up



# Main effects of regulatory intervention: Decrease of traditional postal volumes, emergence of new value chains and shipping models

