Parcel Lockers in Sweden:
Market trends, policy review
and challenges

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Sweden’s E-commerce market

E-commerce net sales in Sweden (SEK bln)
Source: PostNord & HUI Research, E-barometern 2022
Sweden’s E-commerce market

Source: PostNord & Hui Research 2023
Sweden’s E-commerce market

- Adult population shopping online: 7.6 M (96%)
- Average spending consumer/year: 1932 €
- E-commerce sales: 2022 – EUR 12.5B / 2027 - EUR 19.3B
- Av. delivery speed: 1-3 days in Sweden, 2-6 days in Europe
- Dwell time: 7-14 days
- Delivery cost for S/M parcels: 0 – 6 €
- Slipper distance: 350-400m
- Strong sustainability (green) agenda
Parcel locker deliveries

- **Cities**
  - 2019: 3%
  - 2020: 6%
  - 2021: 12%
  - 2022: 13%

- **Smaller towns and rural areas**
  - 2019: 1%
  - 2020: 4%
  - 2021: 9%
  - 2022: 14%
Delivery methods: consumer preferences 2015

- **Click-and-collect**
  - Postal station: 37%
  - Retailer's boutique: 2%
  - Parcel Locker: 2%

- **Attended home delivery**
  - Home Daytime: 4%
  - Home Evening/night: 11%

- **Unattended home delivery**
  - Mailbox: 29%
  - Outside door: 8%
How consumers’ most recent e-commerce purchases were delivered

As parcel lockers have gained market share, the percentage of parcels delivered to distribution points has decreased. The benefits of parcel lockers, such as flexible collection times and proximity to the home, have proved popular with consumers. At the same time, the practice of working from home that became popular during the pandemic has left its mark, with the percentage of parcels delivered outside the door increasing.
How are parcels delivered OOH?

<table>
<thead>
<tr>
<th>Logistics Operator</th>
<th>Postal Offices</th>
<th>Parcel Lockers</th>
</tr>
</thead>
<tbody>
<tr>
<td>POSTNORD</td>
<td>2,300</td>
<td>4,200</td>
</tr>
<tr>
<td>INSTABEE (Instabox &amp; Budbee)</td>
<td>1,000</td>
<td>1,700</td>
</tr>
<tr>
<td>IBOXEN</td>
<td>1,600</td>
<td>1,400</td>
</tr>
<tr>
<td>DHL</td>
<td>1,600</td>
<td>120</td>
</tr>
<tr>
<td>BRING</td>
<td>1,712</td>
<td>68</td>
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<tr>
<td>DB SCHENKER</td>
<td>1,600</td>
<td></td>
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<tr>
<td>DPD</td>
<td>2,014</td>
<td>849</td>
</tr>
<tr>
<td>UPS</td>
<td>618</td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>10,844</strong></td>
<td><strong>8,337</strong></td>
</tr>
</tbody>
</table>
How are parcels delivered OOH?

According to expert estimates, a viable parcel locker network requires at least 1 station per 10,000 inhabitants, a threshold confidently exceeded in Sweden.

Number of Parcel Lockers per 10,000 inhabitants  Source: Last Mile Experts, OOH Delivery in Europe 2023
Research purpose

... to advance the knowledge for parcel locker network development from a policy perspective.
Case Analysis: Stockholm Pilot

“There is a shortage of space on the streets and squares, so we should only have such things that we need to have space for, and that contribute to the city feeling accessible and safe and welcoming and approachable” – Stockholm City
Stakeholder Analysis
Stakeholder Analysis

“Wherever our customers (e-retailers) want it (deliveries), and where the end consumer wants it – that’s where we gonna be”

PostNord

“From the city’s point of view, it (parcel locker) is an interesting infrastructure, and definitely has a role to fill in the city, but I’m not quite sure they (companies) have found the right way for that yet”

Trafikkontoret, Stockholms stad

“Economy, environment, and social development is the essence (to parcel locker placement)”

Halmstads Fastighets
Stakeholder Analysis

- LSPs & PL providers
- E-retailers
- Land owners
- Policy makers
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## Recommendations

1. Incentiveze and promote systematic data collection and sharing
2. Incentiveze and promote environmentally-driven parcel locker network design
3. Incentiveze and promote consolidation
4. System approach in policy development