

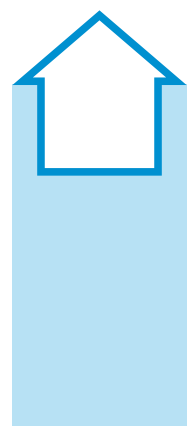
Achieving High Performance in the Postal Industry

High performance. Delivered.



What's happening?

A revenue revolution



52%

Non-mail revenue

For the first time, non-mail revenues, achieved through a diversification strategy, are exceeding mail revenues—52 percent versus 48 percent respectively



48%

Mail revenue

Between 2011 and 2012 the postal industry experienced:



-4.7%

decline in mail volumes



-6.4%

decline in mail services earnings before interest and tax



5.8%

average increase in parcels business volume (including express or courier)

What makes a high performer?

Mail profitability in 2012



Top 5 performers

14%

Bottom 5 performers

-5.9%

Revenue growth in the last five years



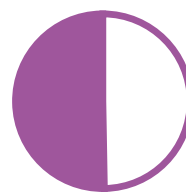
Top 5 performers

3.2%

Bottom 5 performers

-1.7%

Percentage of private ownership in 2014



Top 10 performers

49.9%

Bottom 10 performers

89%

Courier, express, parcel market share in 2012



Top 10 performers

37.1%

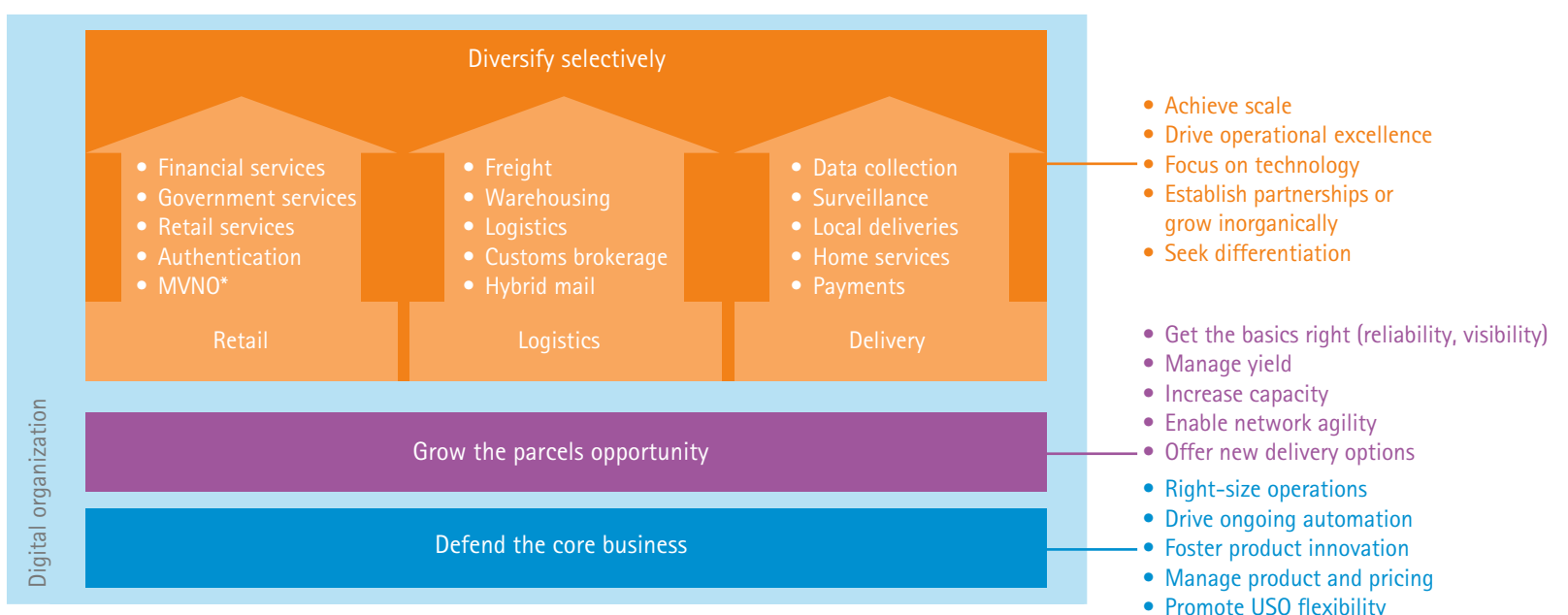
Bottom 10 performers

17.2%

High performers become a digital business across all facets of products, services and channels

Where next?

Postal organizations' strategy needs to be effective in each of three dimensions to achieve high performance



*Mobile Virtual Network Operator

About the study

The annual Accenture research and analysis of the postal industry researched 30 postal or express players around the world. For more visit www.accenture.com/postal