



**Post & Parcel Industry**

# Path to Postal Services Reinvention

Mark Briganti

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Volumes are growing.  
Value is not. Parcels  
alone won't carry posts  
forward. Now is the  
time to reinvent and  
win.

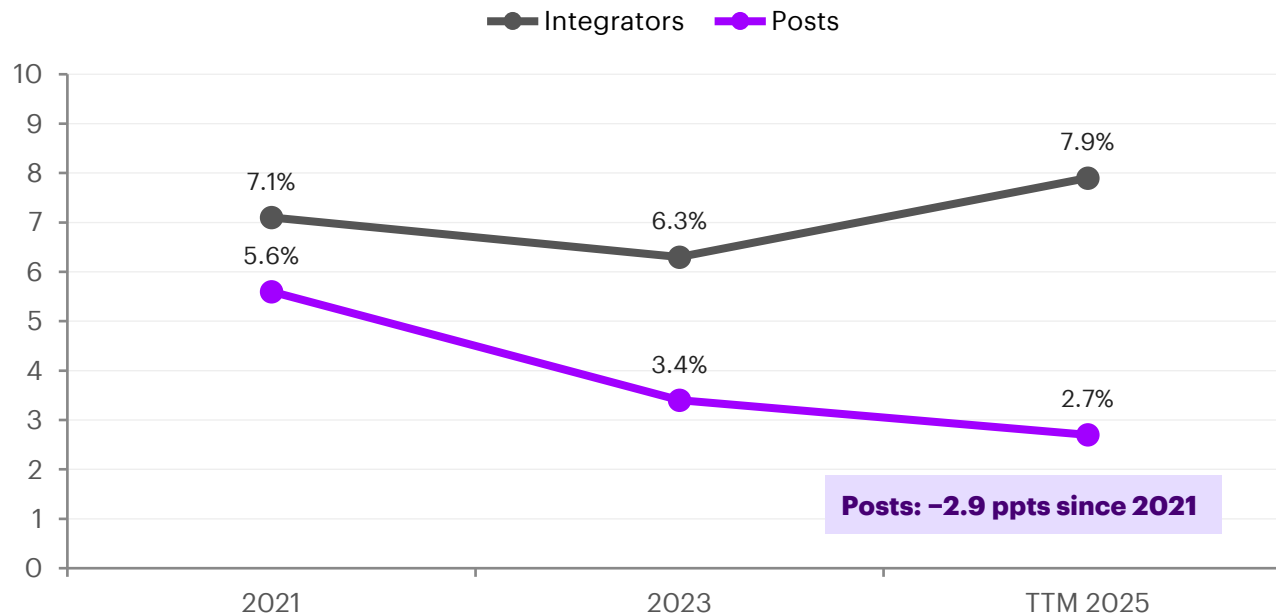


# Volumes are growing but the value isn't

Modest revenue recovery hides a widening profit gap between integrators and posts

## EBIT margin — Integrators<sup>1</sup> vs. Posts<sup>2</sup>

%, FY2021 → TTM 09/2025



**-5.9%**

Unit parcel revenue, 2024 vs. 2020 base

A "more for less" dynamic is taking hold: volumes rise while revenue per parcel keeps falling

**1 in 3**

postal players today have a negative margin

Only 4 of 18 posts gained margin over the last four years; the majority lost ground

**3.9x**

integrator revenue/employee cost vs. 2.1x for posts

Stronger data and operational foundations let integrators scale AI faster — compounding the gap

Notes: (1) Based on the reported local currency of respective companies, PPS refers to percentage points; Companies considered for median calculations are UPS, FedEx, Deutsche Post, Yamato, Aramex, ZTO Express, SF Holding; (2) Poste Italiane, Japan Post, Bpost, Austria Post, Singpost, CTT, PostNL, USPS, La Poste, Australia Post, Post Nord, Canada Post, Posten Norge, NZ Post, Swiss Post, Pos Malaysia, POL, Posti; Sources: Company Reports, S&P Capital IQ, Accenture Client Value Services.

# Forces reshaping the industry

From last-mile fragmentation to AI-led commerce, the competitive structure of the industry has changed, not the demand for delivery

## 01

### Last-mile specialists gaining ground

Fragmenting competitive landscape; new players capturing parts of the value chain

## 02

### Inorganic growth is essential

M&A is accelerating to build scale, capabilities, and integrated logistics propositions

## 03

### The new package profile is here to stay

Growth shifting to lower-yield segments, sustained pressure on revenue per piece

## 04

### AI-led commerce disruption distances carriers from users

Platforms orchestrate logistics decisions, making carrier choice invisible to consumers

## 05

### Cross-border logistics in structural decline for posts

Cross-border e-commerce growing fast — but value is redirecting away from postal networks

## 06

### Workforce challenges persist; AI disrupts

Hiring, retention, wage inflation, plus AI reshaping every frontline and hub role

## 07

### The definition of CX has changed

GenAI and agentic commerce raising expectations from reactive to autonomous

## 08

### Radical regulatory reform is underway

Reduced service standards, more pricing flexibility, scaling down infrastructure



# What's ahead: Four reinvention plays

Winning posts will move beyond delivery

01

## Own more of e-commerce to go beyond the parcel

**Embed into e-commerce economics – not just logistics**

Marketplaces and platforms are abstracting the carrier from the customer, using algorithmic selection and insourcing logistics. Posts must move upstream and downstream to better embed into merchant workflows, fulfillment, cross-border enablement and returns – to capture value beyond the shipment itself.

02

## Run operations with AI at the core – not at the edges

**From pilots to embedded engines**

AI moves from local pilots into planning, routing, workforce and customer operations. In 5 years, adoption pace will not just drive efficiency, it will determine survival. The next phase is not experimentation but industrialization.

03

## Rebalance the business away from structurally low-margin core

**Generate 30–70% outside CEP**

Mail is becoming economically unviable; parcel is structurally low-margin. Winning posts will scale value-added services, expand adjacencies and acquire missing capabilities.

04

## Reclaim value in cross-border or be pushed to the last mile

**Compete for end-to-end cross-border economics**

Cross-border e-commerce is growing rapidly, but value is shifting to integrators and platforms. Posts need a frictionless E2E proposition — checkout, customs, orchestration, returns.



# AI adoption at pace will separate winners from the rest

As AI scales from pilots into operations, expect a strong correlation between adoption speed and performance

## Principles for winning posts

### 01 AI as a core transformation lever

Executive-owned, linked to network, workforce and product strategy — not a standalone IT initiative

### 02 Data foundations, without waiting for perfection

Start with "good enough" data and iterate; standardize key events, fix highest-value gaps, connect what already exists

### 03 AI in operations, not dashboards

Drive decisions and actions in daily workflows — planning, exceptions, customer comms — keeping humans accountable

### 04 Partnerships to move fast

Compress timelines from years to months; run rapid scaling waves with disciplined value tracking and governance

AI is THE opportunity to accelerate transformation. Within the postal sector it can yield...

+5%

EBITA increase  
+7% return on capital employed (ROCE)

+25%

Increase in labor productivity

+5%

Boost to on-time delivery, improving reliability



Where we go from here

# Reinvention isn't optional. The question is pace.

The forces reshaping post & parcel are structural. Winning posts will rethink their role in e-commerce, embed AI in operations and diversify revenue — to capture more value, not just volume.

Let's talk about what reinvention looks like for your organization.

Get in touch



## Mark Briganti

Principal Director

Accenture Post and Parcel Industry, Global Lead

### Email

[mark.j.briganti@accenture.com](mailto:mark.j.briganti@accenture.com)

### LinkedIn

[Mark Briganti](#)

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