



- [Home](#)
- [Our Approach](#)
- [Our Experience](#)
- [Our Leadership Team](#)
- [Our Partners](#)
- [Contact us](#)

**G20 POSTAL SERVICES REPORT:
EMERGING MARKET POSTAL SERVICES
REACHING WESTERN STANDARDS**

- Performance data shows strong improvement in emerging market postal services, led by Turkey’s PTT, Correios Brazil and Russia Post
- WSJ: “This time next year USPS may no longer be the world’s best postal service. Brazilian and Russian operators are already outperforming some European services, an emerging market trend we expect to continue as western governments cut back investments.”

OXFORD, UNITED KINGDOM, 8 February 2012

The first ever international study of the performance of universal postal service providers (USPs), by UK-based management consultancy Oxford Strategic Consulting (OSC) has found across-the-board improvement in emerging market services, led by Turkey’s PTT, Correios Brazil and Russia Post. While developed country operators top the ranking, which analysed performance data from 2007 to 2010, they are now in relative decline.

USPs are regulated by law to provide vital access to services through extensive networks of post offices and guaranteed deliveries of letters and parcels. The report, entitled *Delivering the Future: How the G20’s Postal Services Are Meeting The Challenges of the 21st Century*, found falling traditional mail volumes in many western markets has brought calls for reduced obligations, particularly in the United States and United Kingdom. Meanwhile fast-growing emerging markets view postal services as fundamental to the development of their economies, and have invested accordingly.

Professor William Scott-Jackson, Director of Oxford Strategic Consulting, and Associate Research Fellow, SKOPE, University of Oxford, said: “This time next year USPS may no longer be the world’s best postal service. Brazilian and Russian operators are already outperforming some European services, a trend we expect to continue as western governments cut back investments.”

The fastest-improving postal service operator in the G20 is Turkey’s PTT (12th in the overall ranking), which in 2010 boasted a comparable level of efficiency in deliveries to Italy’s Poste Italiane (11th), and benefits from superior public confidence in its performance. With an expanded network and further improvement to performance, PTT would rank as highly as many European operators.

Correios Brazil (9th) was the second-fastest improver, with a superior efficiency in letter delivery to developed country competitors Korea Post (4th in the overall ranking), Deutsche Post (5th), France’s La Poste (6th) and Canada Post (7th). Russia Post (10th) has meanwhile improved its performance since 2007 faster than any developed country service, also taking it above Italy’s Poste Italiane in the global ranking.

The Best Universal Postal Service Providers in the Emerging Markets, 2007- 2010

Rank	USP (G20 ranking)	Country	Citizens per PO	Letters per delivery employee	Parcels per delivery employee	WEF Postal Service Efficiency 2010
1	Correios Brazil (9)	BR	10,278	72,364	526	5.9
2	Russia Post (10)	RU	3,484	4,295	377	4.7
3	PTT (12)	TU	20,375	37,384	230	5.4
4	Correo Argentina (13)	AR	8,910	37,782	611	3.8
5	SP Mexicano (14)	MX	13,627	117,707	45	3.0
6	India Post (15)	IN	7,651	15,956	438	5.2
7	Pos Indonesia (16)	IND	11,836	18,679	2,747	3.9
8	South African PO (17)	SA	19,871	33,420	1,184	3.1
9	Saudi Post (18)	SAU	39,275	38,196	46	4.9
10	China Post (19)	CN	24,828	8,810	503	5.6

Overall Rankings of G20 Universal Postal Service Providers

Rank	USP (Ranking by improvement)	Country	Citizens per PO	Letters per employee	Parcels per delivery employee	2010 WEF Postal Service Efficiency
1	USPS (14)	USA	8,409	268,894	2,633	6.4
2	Japan Post (17)	JP	5,213	103,149	7,975	6.8
3	Korea Post (6)	SK	4,065	117,702	8,919	6.3
4	Australia Post (15)	AUS	5,573	166,776	6,633	6.3
5	Canada Post (13)	CA	1,516	82,547	1,184	6.4
6	Deutsche Post (11)	DE	6,085	47,670	4,476	6.4
7	Royal Mail (16)	UK	5,146	121,418	845	5.7
8	La Poste (12)	FR	3,638	67,868	1,184	6.6
9	Correios Brazil (2)	BR	10,278	72,364	526	5.9
10	Russia Post (4)	RU	3,484	4,295	377	4.7
11	Poste Italiane (19)	IT	4,227	41,263	162	4.2
12	PTT (1)	TU	20,375	37,384	230	5.4
13	Correo Argentina (5)	AR	8,910	37,782	611	3.8
14	India Post (10)	IN	7,651	15,956	438	5.2
15	Pos Indonesia (9)	IND	11,836	18,679	2,747	3.9
16	SP Mexicano (3)	MX	13,627	41,802	45	3.0
17	South African PO (18)	SA	19,871	33,420	1,184	3.1
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The full report is available commercially from Oxford Strategic Consulting. Please contact Scott Druck at sd@oxfordstrategicconsulting.com for further information.

About Oxford Strategic Consulting

Founded in 2006, Oxford Strategic Consulting (OSC) specialises in advanced research and change implementation, supporting major private and government organisations to achieve their strategic objectives. OSC's approach combines practical research findings with a deep understanding of strategic capabilities and how they can be developed and implemented.

Notes for Editors**1. Adjustments to ranking since preview press release, 15 December 2011**

Following the distribution to media of a preview copy of the report on 15 December, a review of the data found inconsistencies in the datasets for operational efficiency. Adjustments have therefore been made, resulting in Korea Post moving from 4th to 3rd in the overall ranking, Canada Post from 8th to 5th, and SP Mexicano from 14th to 16th. Oxford Strategic Consulting welcomes input from all stakeholders and will ensure such inconsistencies are accounted for in future reports.

2. About Universal Service Postal Providers

Universal service postal providers (USPs) are regulated by law to provide vital access to a range of services through extensive networks of post offices and guaranteed deliveries of letters and parcels. They are committed to delivering a mail delivery service that is dependable and accessible to all citizens and organisations in any given country, thus underpinning their participation in both the wider activities of the country, and its economic activity. This commitment is called a Universal Service Obligation (USO).

Some governments have considered USPs a part of the national infrastructure, worthy of considerable investment and support in order to facilitate development. The US Postal Service was heavily subsidised for many years, for example. In recent years, a number of USPs have been privatized, such as Germany's Deutsche Post.