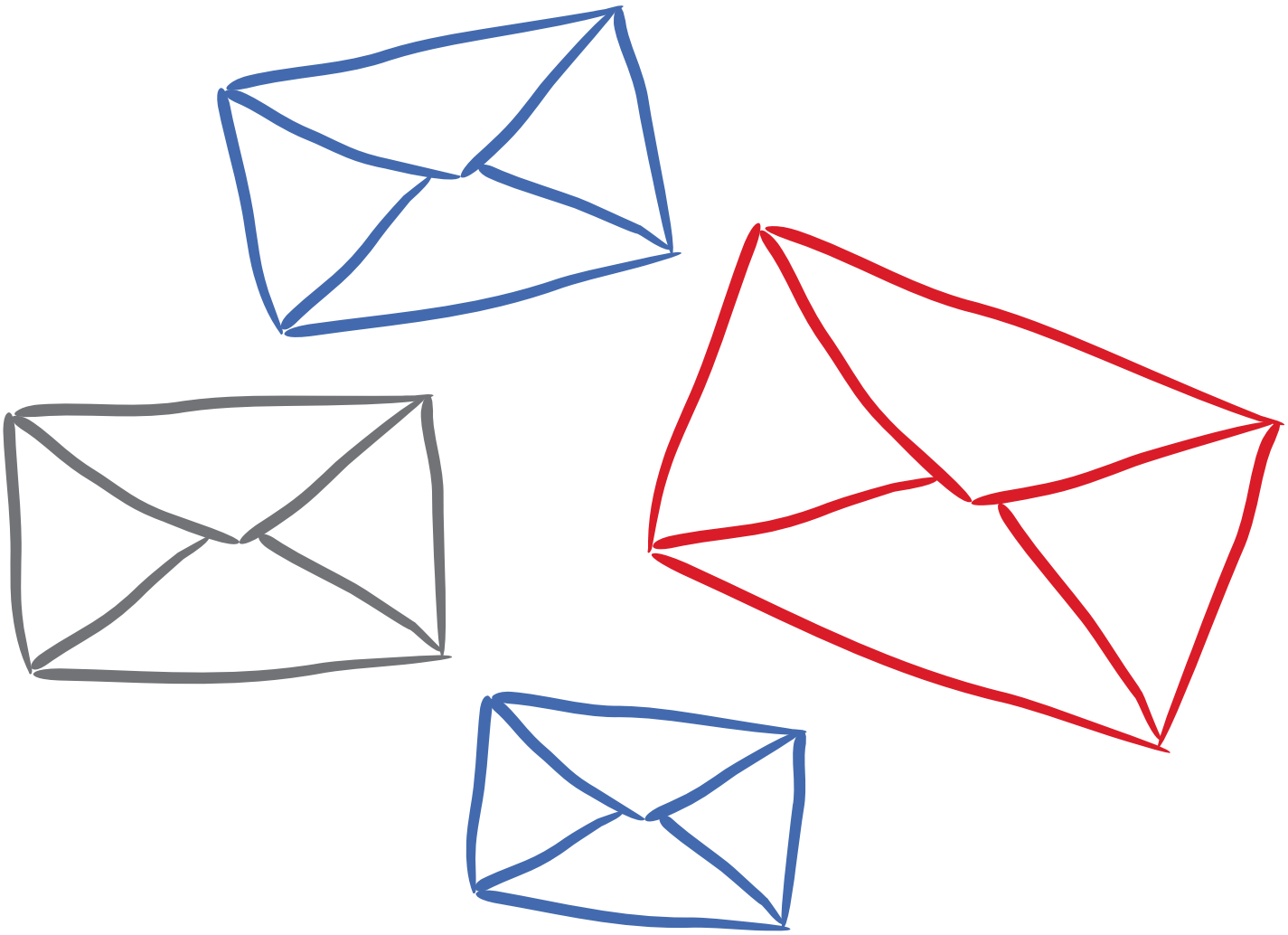
ANCOM
Autoritatea Naţională pentru Administrare
şi Reglementare în Comunicaţii

Report on the statistical data for the Romanian postal services market in 2014



This report relies on the 2014 statistical data for the postal sector, collected pursuant to the Decision of the President of the National Authority for Communications no.127/2009 on the reporting of certain statistical data by the postal service providers, published in the Romanian Official Journal, Part One, no. 151 of 11 March 2009.

The data have been processed and interpreted in accordance with the Romanian legislation in force in 2014, with the recommendations of the Universal Postal Union (UPU), of the European Regulators Group for Postal Services (ERGP), as well as with the requirements of the European Statistics Office in the postal field – EUROSTAT.

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1. Introduction

The National Authority for Management and Regulation in Communications, hereinafter referred to as ANCOM, is the institution entrusted with the implementation of the national policy in the postal sector. In its activity, ANCOM aims at the following objectives: protecting the end-users' rights, stimulating investments and promoting competition.

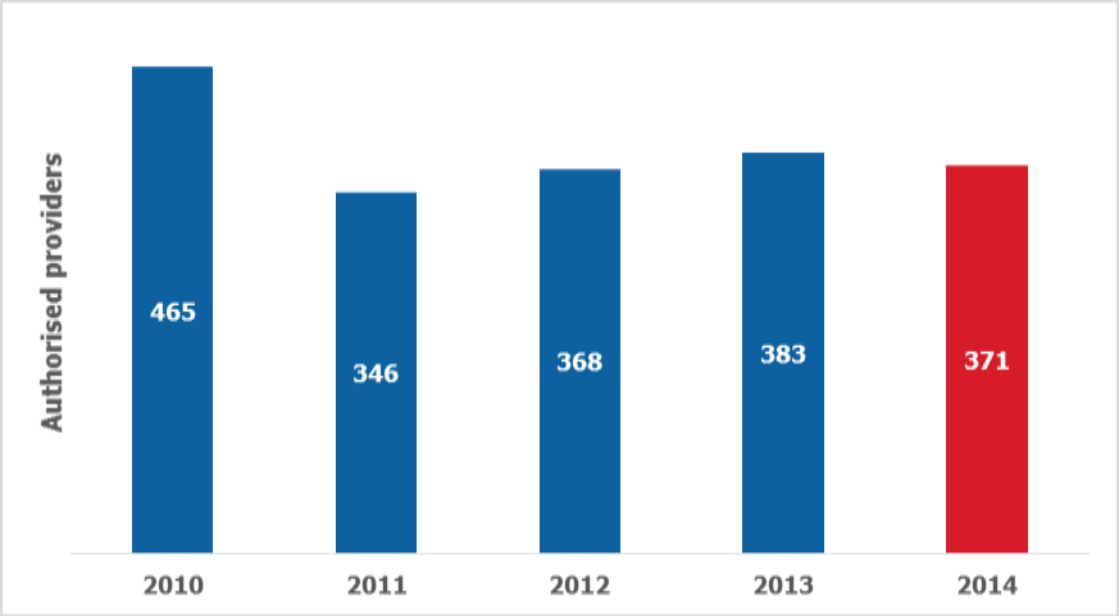
This report presents the overall picture of the 2014 postal market and its dynamics in the previous five years, based on the data reported by the postal service providers.

2. Overview of the postal service providers

2.1 Dynamics of the authorisation process

The number of providers who obtained the right to operate in the postal sector is one of the basic indicators of the attractiveness of this market. Exhibit 1 displays the dynamics of the authorisation of postal service providers in the past five years.

Exhibit 1 Authorisation of postal service providers during 2010-2014



An analysis of the authorisation process in the past years shows that, during 2012 – 2014, the postal market was stabilised from this point of view, in 2014 the number of authorised providers declining by only 3,13% as compared to 2013.

2.2 The postal service providers in 2014

Similarly to the previous years, with a view to collecting statistical data for the year 2014, ANCOM sent a statistical data questionnaire to all the postal service providers and made available, on its website, an online application by means of which these providers could fill in their data, based on a password received from ANCOM.

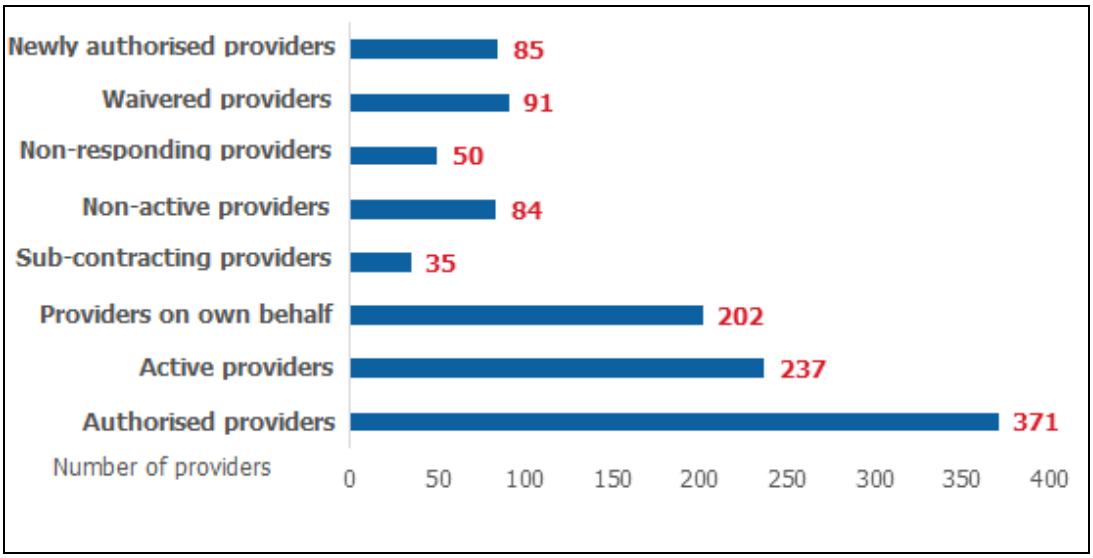
Out of the 371 providers authorised to supply postal services as of 31.12.2014, only 86 accessed this application (sent their data in electronic format, as well).

The analysis of the 2014 statistical data collected from the poistal service providers revealed that:

- 321 providers sent statistical data;
- 237 providers were active (actually provided services) in the postal services market, i.e. 63.88% of the total authorised providers (371) as of 31.12.2014;
- 84 providers out of the 321 that sent statistical data (22.64% of the authorised providers) did not exercise their right to provide postal services;

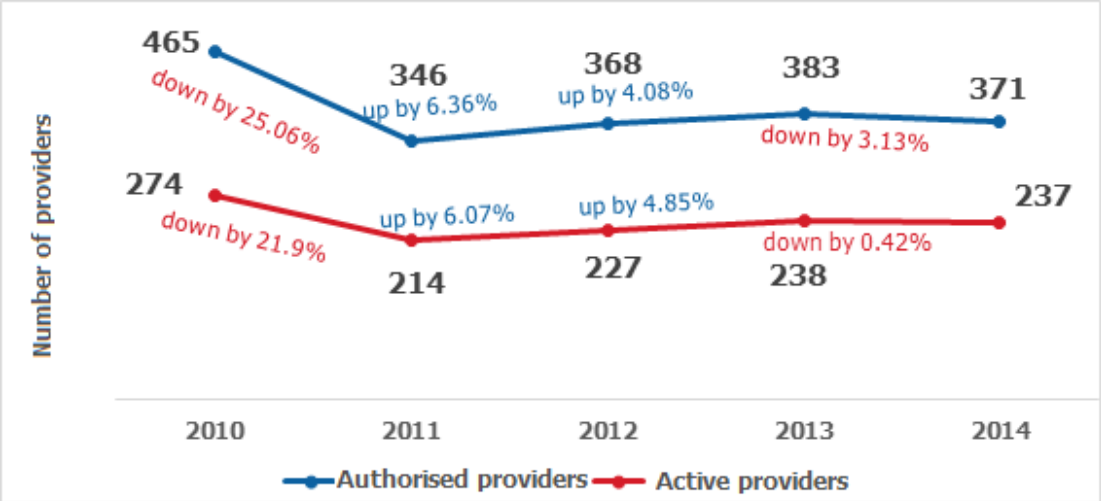
- 202 providers operated on the postal market on their own behalf, accounting for 54.44% of the total authorised providers (371) and 85.23% of the active providers, respectively;
- 35 active providers were mandated to provide postal services on behalf and on the account of another postal provider, based on a contract (14.77% of the active providers);
- 85 entities acquired the right to provide postal services in 2014, while 91 postal service providers waivered this right.

Exhibit 2 Activity of the postal service providers in 2014



2.3 Dynamics of the authorised /active postal service providers during 2010-2014

Exhibit 3 Dynamics of the number of authorised and active providers, 2010 – 2014



The analysis of the dynamics of the number of active postal service providers (PSP) in the postal market in the recent years show that, during 2012-2014, the market was stabilized both as regards the number of authorised providers and the number of active providers, with fluctuations of less than 5%.

Table no.1 Status of newly authorised/waivered PSP each year, during 2010-2014, by market segments

Postal service		Reference year				
		2010	2011	2012	2013	2014
Postal services within the scope of universal service dealig with *Items of Correspondence*	newly authorised	40	40	78	50	81
	waived	21	20	28	12	2
	active *	9	6	21	7	17
Postal services outside the scope of universal service dealig with *Items of Correspondence*	newly authorised	22	31	67	39	61
	waived	17	16	27	9	2
	active *	8	2	13	4	12
Postal services within the scope of universal service dealig with *Postal Parcels*	newly authorised	37	31	70	50	79
	waived	15	12	23	9	2
	active *	8	6	19	13	15
Postal services within the scope of universal service dealig with *Postal Parcels*	newly authorised	32	33	61	49	74
	waived	14	13	20	9	2
	active *	6	6	16	16	13
Courier services (*Cash-on-delivery, Change of destination, Special delivery, Advice of delivery, Express*)	newly authorised	31	30	68	38	50
	waived	15	15	26	9	2
	active *	8	2	20	9	16
Financial services (*Money order on paper support*)	newly authorised				4	11
	waived					
	active *				1	1

* providers authorised in the reference year, that provided the respective service, in the reporting year 2014

2.4 Postal service providers' option for services included within the scope of universal service

The persons who wish to become postal service providers may choose to provide the following services within the scope of universal service:

A1. Clearance, sorting, transport and delivery of postal items weighing up to 2 kg (correspondence items, printed matter items);

A2. Clearance, sorting, transport and delivery of domestic and cross-border cecogrammes;

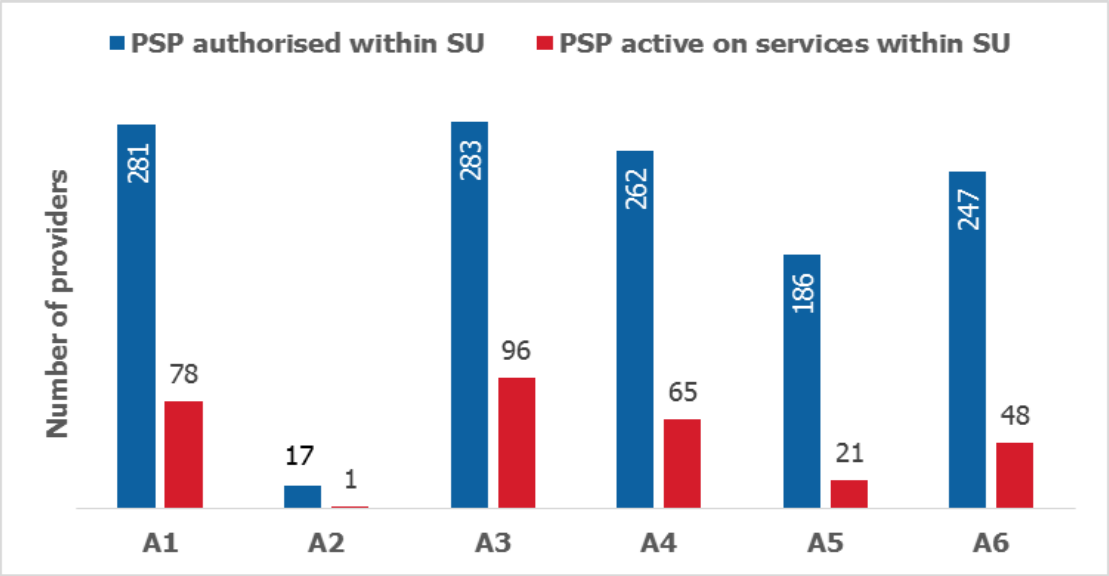
A3. Clearance, sorting, transport and delivery of postal parcels weighing up to 10 kg;

A4. Distribution of postal parcels weighing up to 20 kg sent from outside Romania to an address located in Romania;

A5. Service for registered items dealing with postal items weighing up to 2 kg;

A6. Service for insured items subject to postal items up to 2 kg or postal parcels up to 10 kg, respectively postal parcels weighing between 10 and 20 kg, sent from outside Romania to an address located on its territory.

Exhibit 4 **Distribution of postal providers, itemised by the option concerning the provision of postal services at authorisation and the actual achievement of these options in 2014**



Although the persons wishing to authorise tend to show their availability to provide all the postal services within the scope of universal service, the analysis of the reported data, respectively the volume of the cleared and distributed postal items, revealed that in 2014 the majority of the providers were authorised and activated in processing postal parcels weighing up to 10 kg (A3) and items of correspondence, respectively printed matter items weighing up to 2 kg (A1), similarly to 2013.

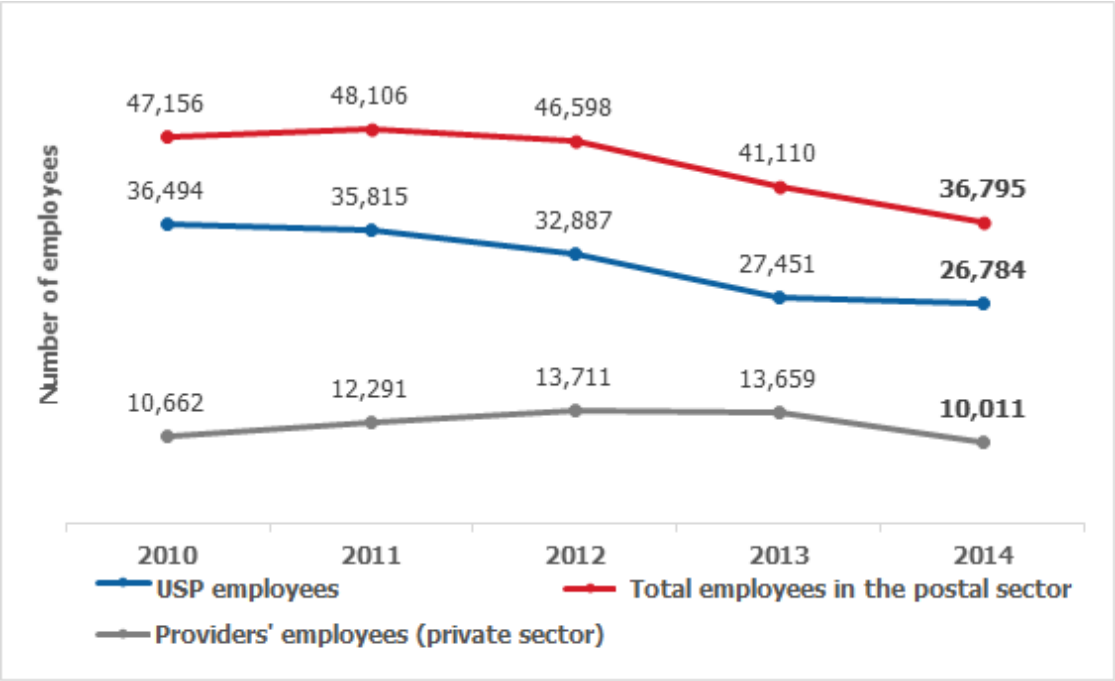
3. Human resources

In 2014, the Romanian postal market counted **36,795** employees, of whom **26,784** (i.e. 72.8% of the total employees in the postal sector) were working for the universal service provider **"National Company Romanian Post"** (**CNPR**).

Table 2 Dynamics of the number of employees in the postal sector, 2013-2014

Indicators	2013	2014	Dynamics (%)
Number of employees of the universal service provider	27,451	26,784	**-2.43%**
Number of authorised providers' employees (private sector)	13,659	10,011	**-26.71%**
Total number of employees in the postal sector	41,110	36,795	**-10.49%**

Exhibit 5 Dynamics of the number of employees in the postal sector, 2010-2014



4. Postal traffic in 2014

4.1 Overview of the postal traffic

The 2014 total postal traffic amounted to **623,205,073** items, with **592,921,878** domestic postal items, i.e. 95.14% of the total postal traffic, and **30,283,195** cross-border postal items, i.e. 4,86% of the total traffic.

Exhibit 6 Dynamics of the total postal traffic, 2010-2014

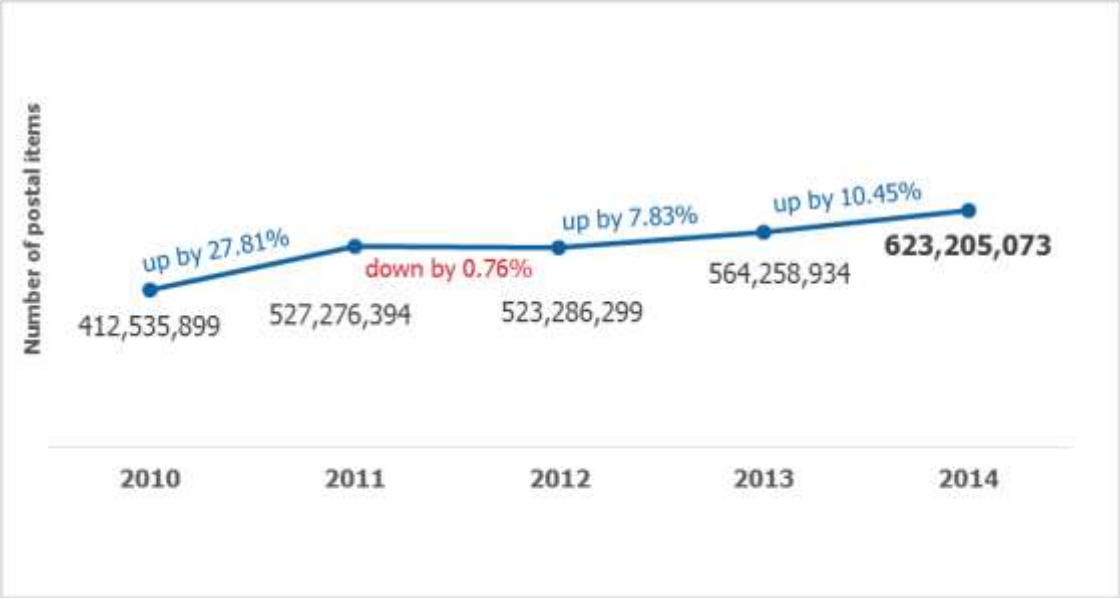


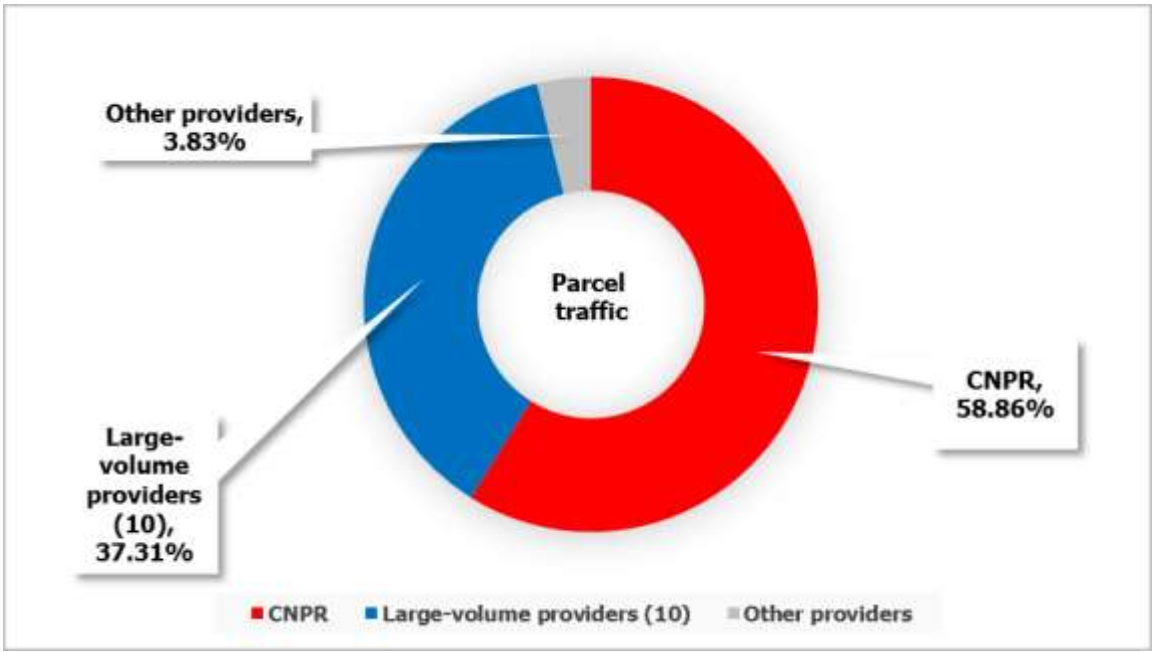
Table 3 Comparative analysis of the total postal traffic during 2013-2014

Indicators	Domestic	Cross-border	Total
2013	530,106,224	34,152,710	564,258,934
2014	592,921,878	30,283,195	623,205,073
Dynamics (%)	**+11.85%**	**-11.33%**	**+10.45%**

Out of the total postal traffic achieved in 2014 (**623,205,073** items), CNPR processed **366,849,865** postal items (58.86%); the next ten large volume providers in the market processed **232,491,221** items (37.31%), whereas the other providers handled **23,836,987** items (3.83%).

The first 10 providers that registered the highest postal traffic (excluding the universal service provider) in 2014 are (in alphabetical order): CARGUS INTERNAȚIONAL S.A., DYNAMIC PARCEL DISTRIBUTION S.A., FAN COURIER EXPRESS S.R.L., GLS GENERAL LOGISTICS SYSTEMS ROMÂNIA S.R.L., NEMO PROD COM IMPEX S.R.L., POȘTA ATLASSIB CURIER RAPID S.R.L., POSTMASTER S.R.L., STAR STORAGE S.A., TOTAL POST MAIL SERVICES S.R.L., URGENT CURIER S.R.L.

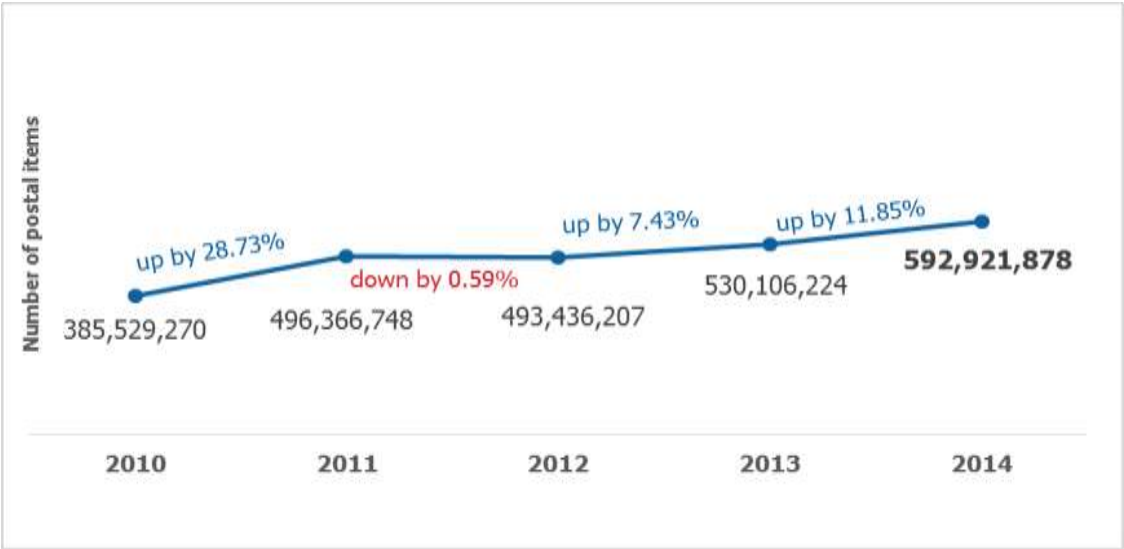
Exhibit 7 **Distribution of postal market among postal providers in 2014**



- ***Total domestic traffic***

Analysing the dynamics of the ***total domestic traffic***, one can notice that the market of domestic items registered an upward trend in the past five years, excepting 2012, when the trend was approximately constant (decrease by less than 1%).

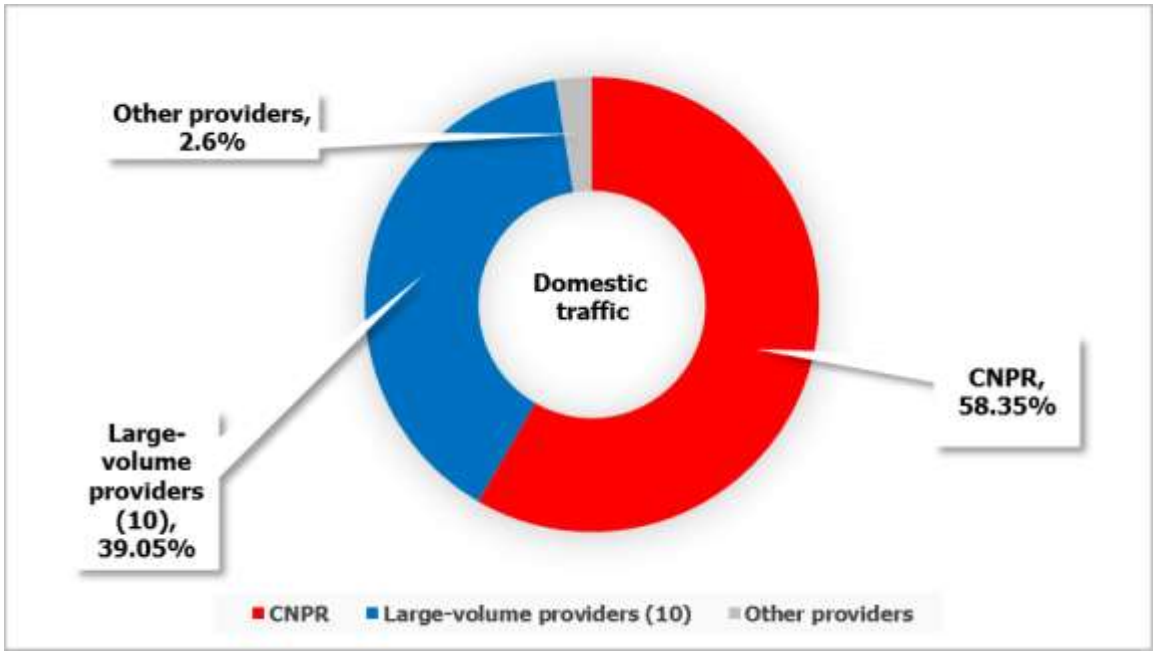
Exhibit 8 **Dynamics of the total domestic traffic, 2010-2014**



CNPR processed **345,970,400** items, namely 58.35% of the 2014 total domestic traffic (**592,921,878** items). The next ten large volume providers in this market segment handled **231,542,102** items, which is 39.05% of the total processed domestic items, while the other providers dealt with **15,409,376** items, i.e. 2.6% of this market segment.

The first 10 providers that registered the largest domestic postal traffic (excluding the universal service provider) in 2014 are (in alphabetical order): CARGUS INTERNAȚIONAL S.A., DELIVERY SOLUTIONS S.A., DYNAMIC PARCEL DISTRIBUTION S.A., FAN COURIER EXPRESS S.RL., GLS GENERAL LOGISTICS SYSTEMS ROMÂNIA S.R.L., NEMO PROD COM IMPEX S.R.L., POSTMASTER S.R.L., STAR STORAGE S.A., TOTAL POST MAIL SERVICES S.R.L., URGENT CURIER S.R.L.

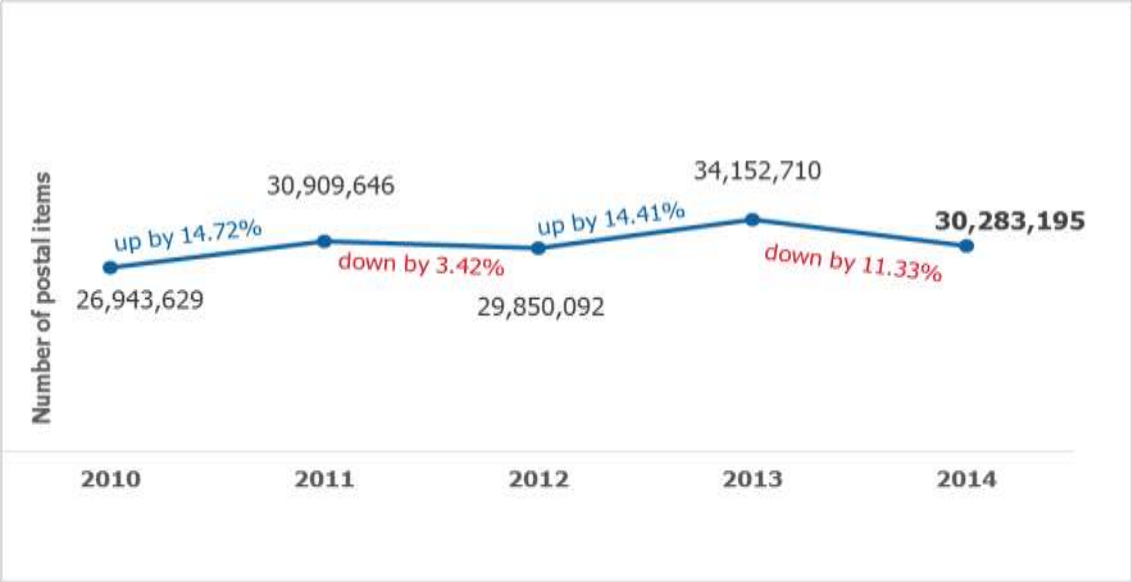
Exhibit 9 **Distribution of domestic postal market among postal providers in 2014**



- ***Total cross-border traffic***

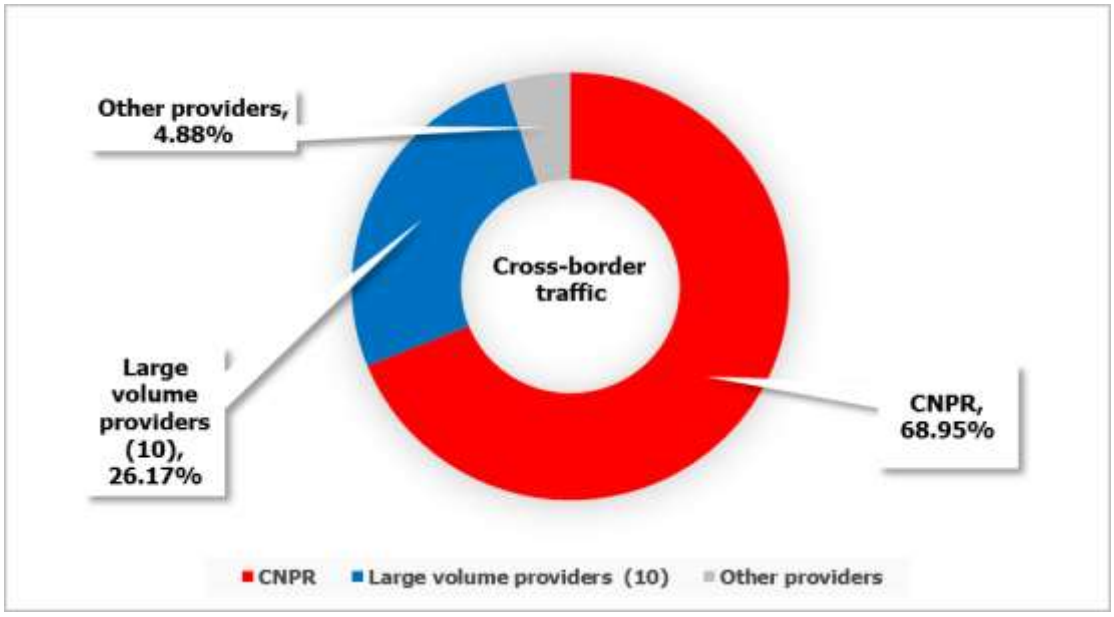
Between 2010 and 2014, ***total cross-border traffic*** was characterised by successive ups and downs.

Exhibit no.10 **Dynamics of total international traffic during 2010-2014**



CNPR processed **20,879,465** items, namely 68.95% of the 2014 cross-border postal traffic (**30,283,195** items), while the next ten large volume providers in this market segment dealt with **7,925,649** items, accounting for 26.17% of the total cross-border postal traffic. The other providers handled **1,478,081** items, i.e. 4.88% of this market segment.

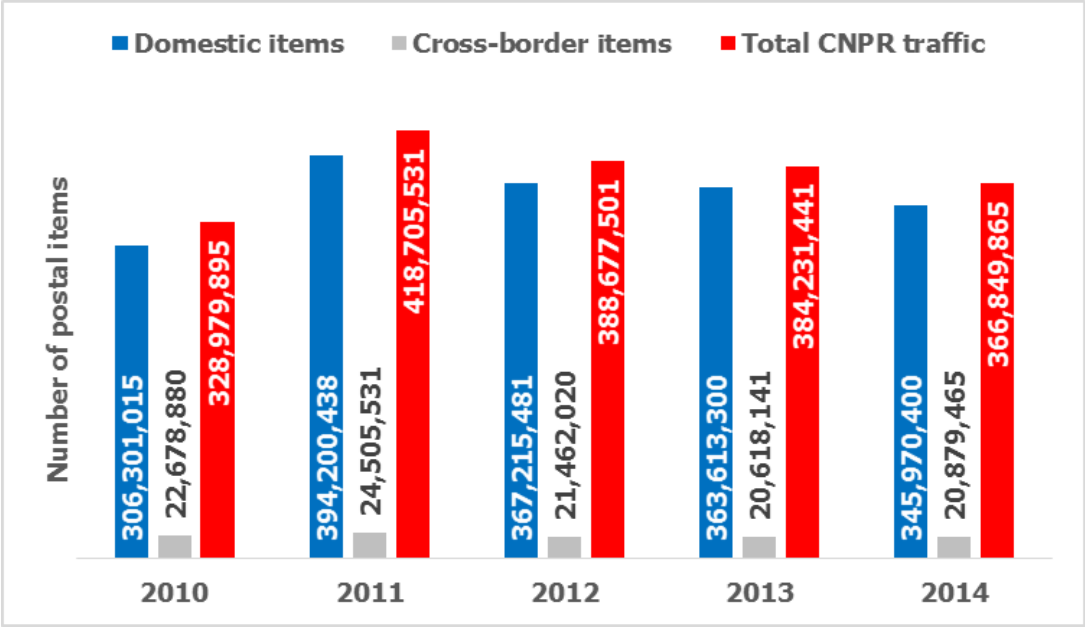
Exhibit 11 **Distribution of cross-border postal market among postal service providers in 2014**



The first 10 providers that registered the largest cross-border postal traffic (excluding the universal service provider) in 2014 are (in alphabetical order): ATLASSIB S.R.L., BÂRSAN TRANS S.R.L. SPANIA SUCURSALA SEBEȘ, DHL INTERNAȚIONAL ROMÂNIA S.R.L., DYNAMIC PARCEL DISTRIBUTION S.A., GLS GENERAL LOGISTICS SYSTEMS ROMÂNIA S.R.L., LOGISTICA TRANS ROM S.R.L., POȘTA ATLASSIB CURIER RAPID S.R.L., TNT ROMÂNIA S.R.L., UPS ROMÂNIA S.R.L., WORLD MEDIATRANS S.R.L.

4.1.1 Universal service provider's postal traffic

Exhibit 12 **CNPR total postal traffic during 2010 – 2014**



The analysis of the total traffic of postal items processed by the universal service provider (CNPR) shows that, in 2014, this traffic dropped by 4.52% compared to the 2013 one.

Table no. 4 Comparative analysis of the postal traffic of the universal service provider (CNPR) during 2013 – 2014

Indicators	Domestic	Cross-border	Total
2013	363,613,300	20,618,141	384,231,441
2014	345,970,400	20,879,465	366,849,865
Dynamics (%)	**- 4.85%**	**+1.27%**	**- 4.52%**

4.1.2 Private providers' postal traffic

In the past five years the private providers' traffic was on a constant rise, and 2014 actually saw a traffic upsurge by more than 40%.

Exhibit 13 Private providers' traffic, 2010 – 2014

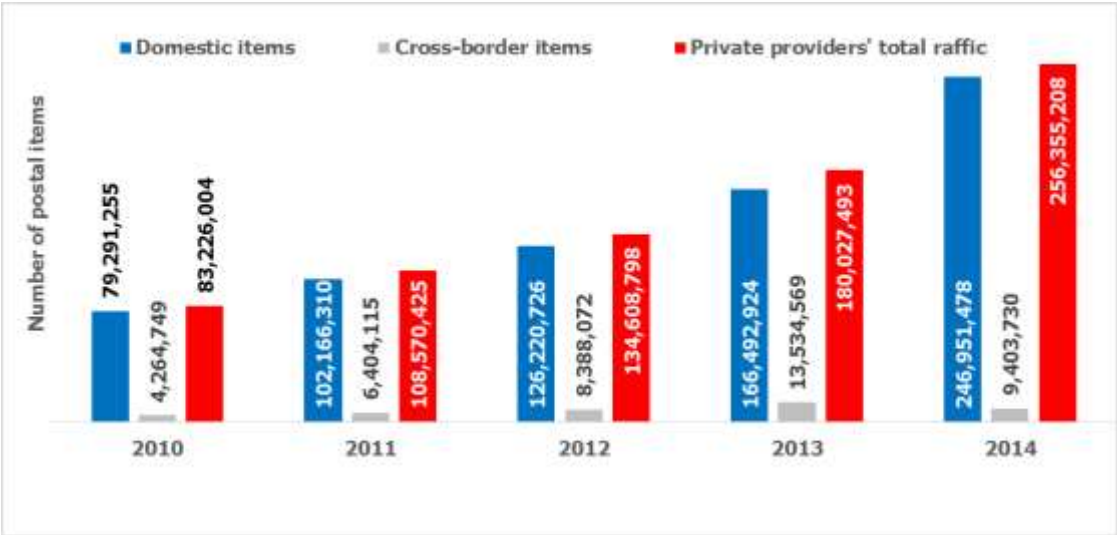


Table no.5 Dynamics of the postal providers' traffic, other than CNPR, 2013 – 2014

Indicators	Domestic	Cross-border	Total
2013	166,492,924	13,534,569	180,027,493
2014	246,951,478	9,403,730	256,355,208
Dynamics (%)	**+ 48.33%**	**- 30.52%**	**+ 42.4%**

4.2. Structural analysis of the postal traffic

*1. Letter-post traffic**

In 2014, the letter-post traffic amounted to **540,193,857** items, which means 86.68% of the total postal traffic (**623,205,073**).

* **Letter-post –** postal services dealing with postal items (correspondence, printed matter and direct mail items) weighing up to 2 kg.

Exhibit 14 **Letter-post traffic, 2010-2014**

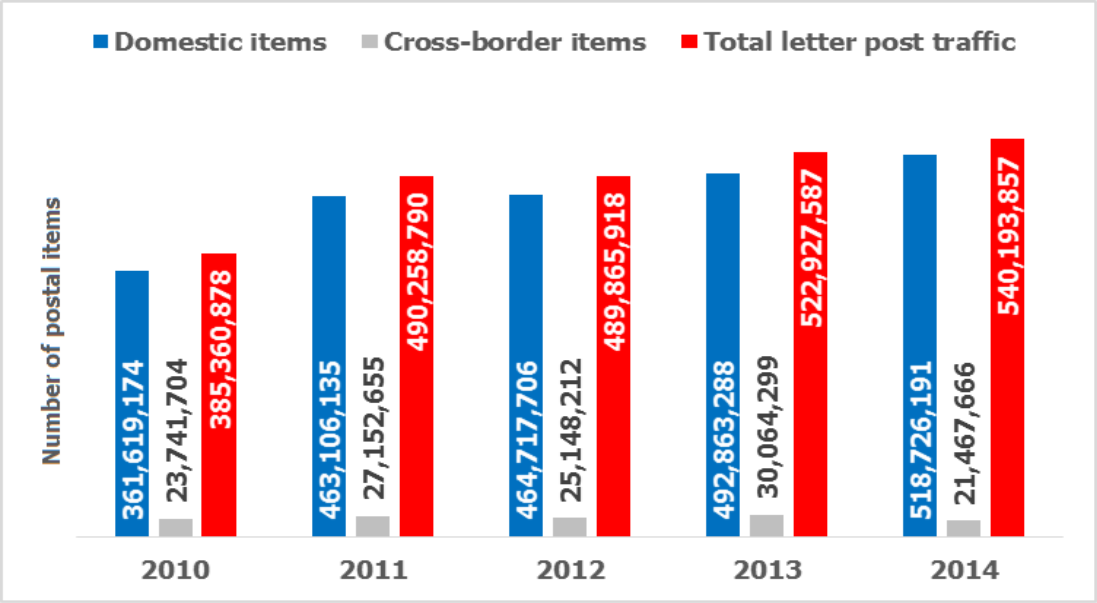


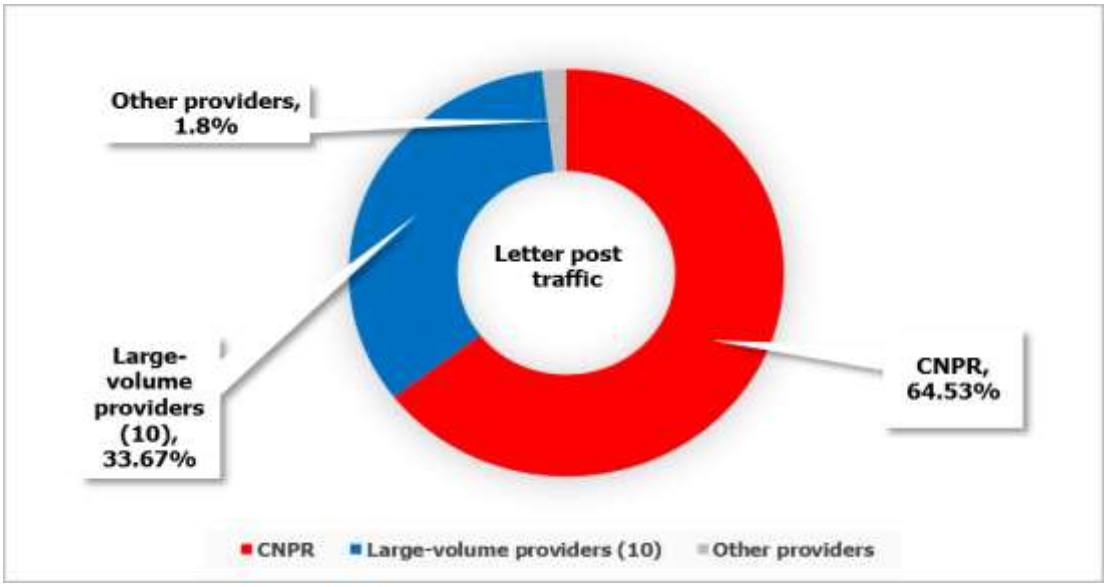
Table 6 **Dynamics of letter-post traffic during 2013 – 2014**

Indicators	Domestic	Cross-border	Total
2013	492,863,288	30,064,299	522,927,587
2014	518,726,191	21,467,666	540,193,857
Dynamics (%)	**+5.25%**	**-28.6%**	**+3.30%**

Within the total 2014 letter-post traffic (540,193,857 items), CNPR processed **348,587,386** items (64.53%), the next ten large volume providers in this market segment dealt with **181,880,995** items (33.67%), while the other providers handled **9,725,476** items (1.8%).

The top ten providers which registered the largest letter-post traffic in 2014 (excluding the universal service provider) are (in alphabetical order): CARGUS INTERNAȚIONAL S.A., DELIVERY SOLUTIONS S.A., DYNAMIC PARCEL DISTRIBUTION S.A., FAN COURIER EXPRESS S.R.L., GLS GENERAL LOGISTICS SYSTEMS ROMÂNIA S.R.L., NEMO PROD COM IMPEX S.R.L., POSTMASTER S.R.L., STAR STORAGE S.R.L., TOTAL POST MAIL SERVICES S.R.L., URGENT CURIER S.R.L.

Chart 15 **Distribution of letter-post market among postal providers in 2014**



2. Parcel traffic

In 2014, **62,014,543** postal parcels were cleared and delivered, i.e. 9.95% of the total postal traffic (**623,205,073**).

More specifically, the following volumes were processed in 2014:

- **55,469,759** domestic postal parcels (89.45% of the total parcel traffic), i.e. 9.35% of the total domestic postal traffic (**592,921,878**);
- **6,544,784** cross-border postal parcels (10.55% of the total parcel traffic), i.e. 21.61% of the total cross-border postal traffic (**30,283,195).**

Exhibit 16 Parcel traffic during 2010-2014

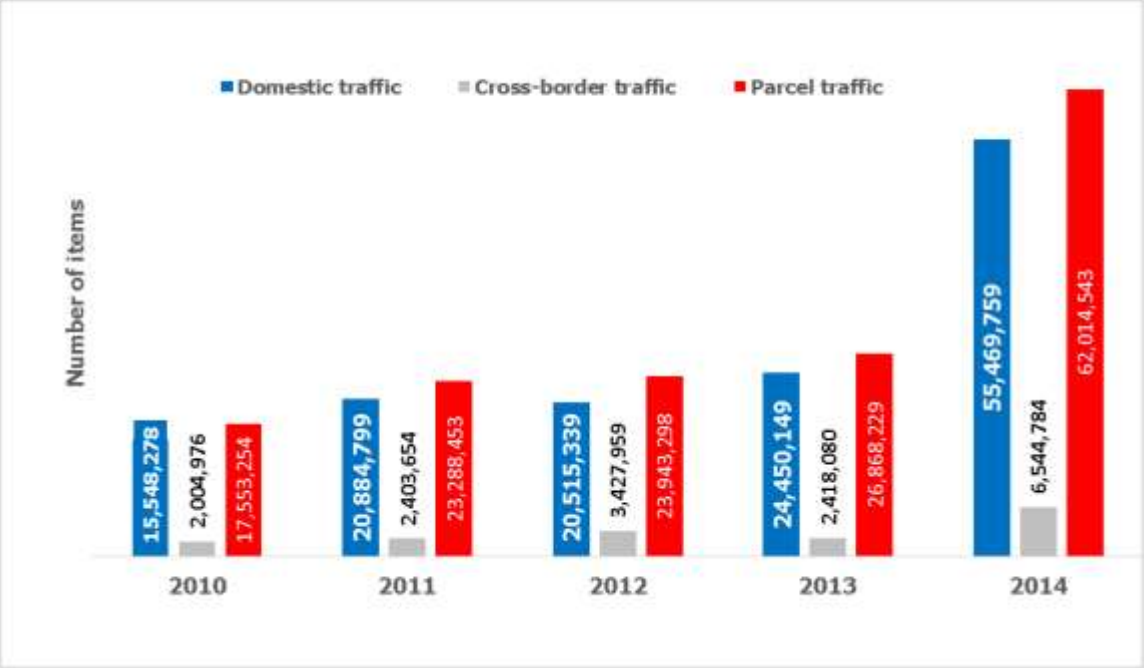


Table 7 Dynamics of the parcel traffic during 2013 – 2014

Indicator	Domestic	Cross-border	Total
2013	24,450,149	2,418,080	26,868,229
2014	55,469,759	6,544,784	62,014,543
Dynamics (%)	**+126.87%**	**+ 170.66%**	**+ 130.81%**

The past five years' dynamics of the parcel traffic shows that:

- during 2011-2012 the parcel market was approximately constant, (insignificant growth, less than 3%)

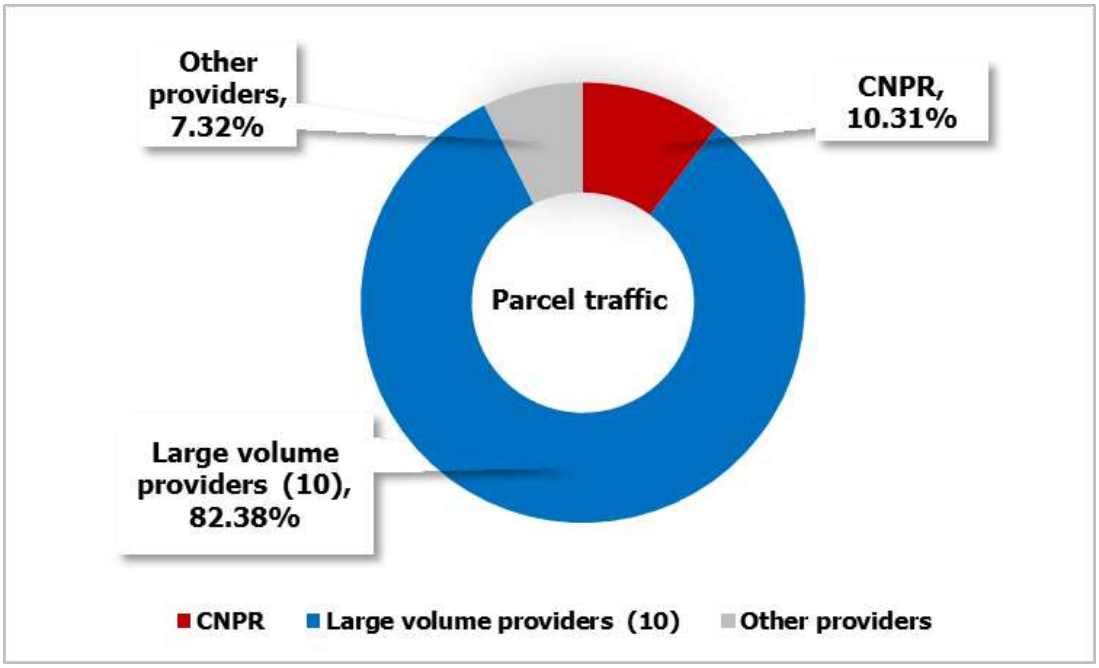
- in 2013, the total parcel traffic grew by 10%;

- in 2014, an upsurge by more than 130% was registered.

Out of the 2014 total parcel traffic which amounted to **62,014,543** items, CNPR processed **6,390,029** parcels (10.31%), while the next ten large volume providers in this market segment processed together **51,086,167** parcels (82.38%). The other providers processed **4,538,347** parcels, accounting for 7.32% of the total parcel traffic.

The following providers (excluding the universal service provider) registered the most significant traffic in the parcel market in 2014 (in alphabetical order): BÂRSAN TRANS S.R.L. SPANIA SUCURSALA SEBEȘ, CARGUS INTERNAȚIONAL S.A., DHL INTERNAȚIONAL ROMÂNIA S.R.L., DYNAMIC PARCEL DISTRIBUTION S.A., FAN COURIER EXPRESS S.R.L., GLS GENERAL LOGISTICS SYSTEMS ROMÂNIA S.R.L., LOGISTICA TRANSROM S.R.L. SUCURSALA SEBEȘ, NEMO PROD COM IMPEX S.R.L., UPS ROMÂNIA S.R.L., URGENT CURIER S.R.L.

Exhibit 17 Distribution of parcel market among postal providers in 2014



*3. Express traffic**

In 2014, the total Express traffic registered **8,720,319** postal items, accounting for 1.4 % of the total postal traffic (**623,205,073**).

The analysis of the statistical data for Express services during 2014 showed that:

- domestic traffic amounted to **7,412,106** postal items, i.e. 1.25% of the total domestic traffic (**592,921,878**);
- cross-border traffic amounted to **1,308,213** postal items, i.e. 4.32% of the total cross-border traffic (**30,283,195**).

In line with the dynamics of the total Express traffic in the past years, one can notice that this traffic registered ups and downs during 2010-2014, 2014 witnessing the lowest level in the past 5 years.

* **Express services** – postal services that fulfil, cumulatively, the following requirements: the provider gives the sender a document stating the date and hour of the delivery and, usually, the payment of the fee; delivery of the postal item to the addressee in person or to his/her authorised representative; the provider is liable for delayed delivery; fast delivery of the postal items.

Exhibit 18 **Express traffic during 2010-2014**

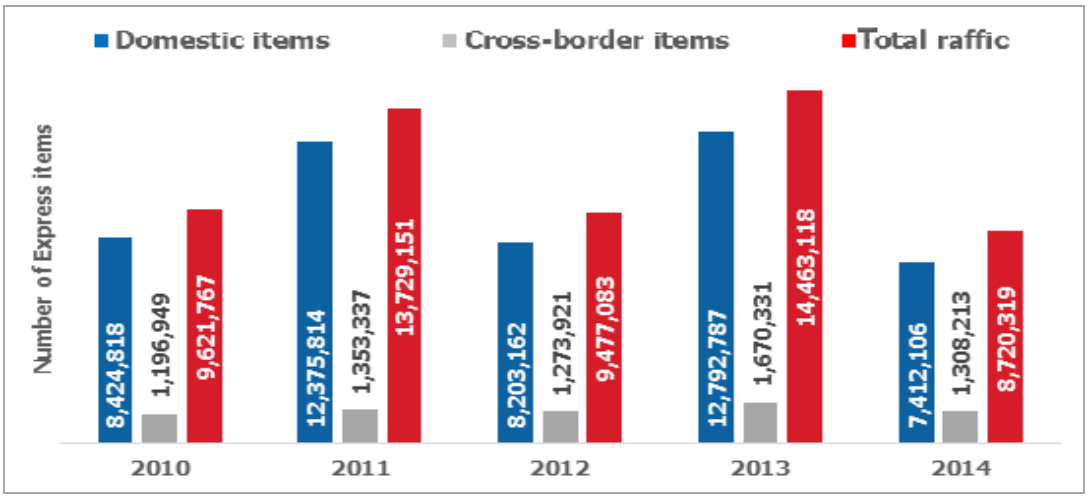


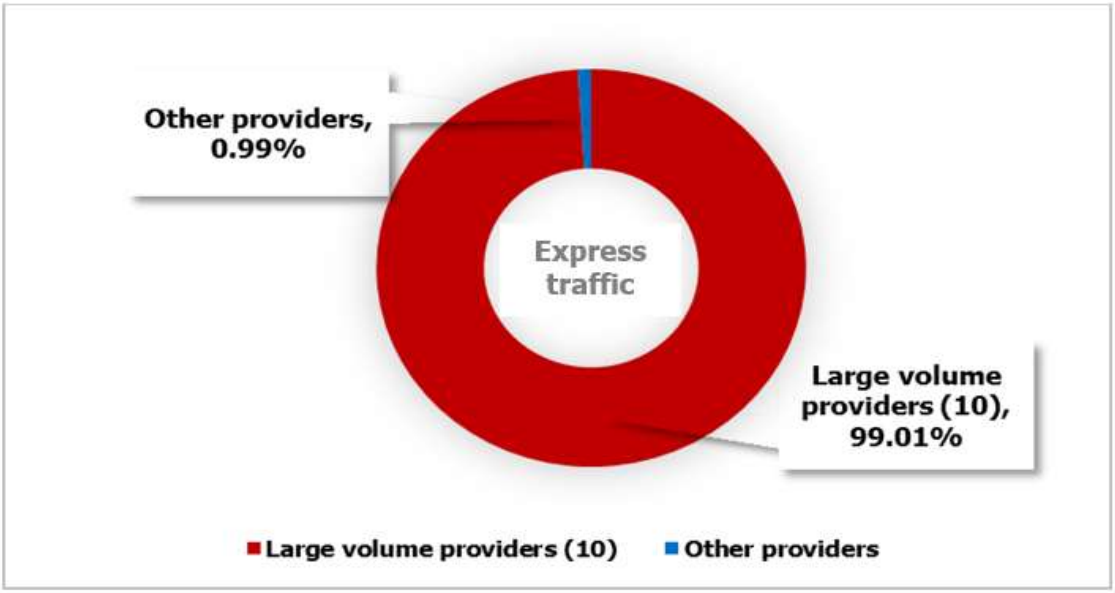
Table 8 **Dynamics of Express traffic during 2013 – 2014**

Indicator	Domestic	Cross-border	Total
2013	12,792,787	1,670,331	14,463,118
2014	7,412,106	1,308,213	8,720,319
Dynamics (%)	**-42.06%**	**-21.68%**	**-39.71%**

Out of the total Express traffic (**8,720,319**), the ten largest providers in this market segment handled **8,634,291** items (99.01%), while the other providers dealt with **86,028** items, accounting for 0.99% of the total Express traffic.

The following providers (excluding the universal service provider) registered the most significant traffic in the Express segment in 2012 (in alphabetical order):): NATIONAL COMPANY ROMANIAN POST S.A., DELIVERY SOLUTIONS S.A., DINAMIC PARCEL DISTRIBUTION S.A, ECONT FOR YOU S.R.L., FASTIUS CURIER S.R.L., INTERNAȚIONAL ROMEXPRESS SERVICE LTD S.R.L., NEMO PROD COM IMPEX S.R.L., POȘTA ATLASSIB CURIER RAPID S.R.L., TNT ROMÂNIA S.R.L., UPS ROMÂNIA S.R.L.

Exhibit 19 **Distribution of Express market among postal providers in 2014**



As shown in Exhibit 19, the Express market was dominated in 2014 by 10 large volume providers (including the universal service provider), holding 99% of the market, the other providers in this market segment holding an insignificant share – less than 1%.

4. Traffic of postal items of correspondence and printed matter weighing more than 2 kg

In 2014, the total number of items of correspondence and printed matter amounted to **3,927,553** postal items, of which:

- **3,460,364** domestic postal items,
- **467,189** cross-border postal items.

5. Traffic of direct mail items

In 2014, the total number of direct mail items was **18,761,030** postal items, of which:

- **15,936,565** domestic postal items,
- **2,824,465** cross-border postal items.

6. Traffic of money orders on paper support

In 2014, the total number of money orders on paper support was **8,348,801**, of which:

- **7,853,458** domestic orders,
- **495,343** cross-border money orders.

4.2.1. Structure of 2014 postal traffic

Table no. 9 Traffic distribution by market segments

Market segment	**No. of postal items *domestic***	*Distribution of items in the domestic market %*	**No. of postal items *cross-border***	*Distribution of items in the cross-border market %*	**Total postal items**	*Distribution of items in the postal market %*
Letter post (items ≤2Kg)	502,789,626	84.80	18,643,201	61.56	521,432,827	83.67
Parcels	55,469,759	9.36	6,544,784	21.61	62,014,543	9.95
Express	7,412,106	1.25	1,308,213	4.32	8,720,319	1.39
Correspondence and printed matter >2Kg	3,460,364	0.58	467,189	1.54	3,927,553	0.63
Direct mail	15,936,565	2.69	2,824,465	9.32	18,761,030	3.01
Money orders	7,853,458	1.32	495,343	1.65	8,348,801	1.35

Taking into account the data defining the structure of the postal traffic in 2014, Exhibits 20, 21 and 22 show the shares of letter-post, parcel and Express, items of correspondence and printed

matter weighing more than 2Kg, direct mail and financial services (money orders) within the total postal traffic, domestic and cross-border.

Exhibit 20 Distribution of total postal traffic, in 2014

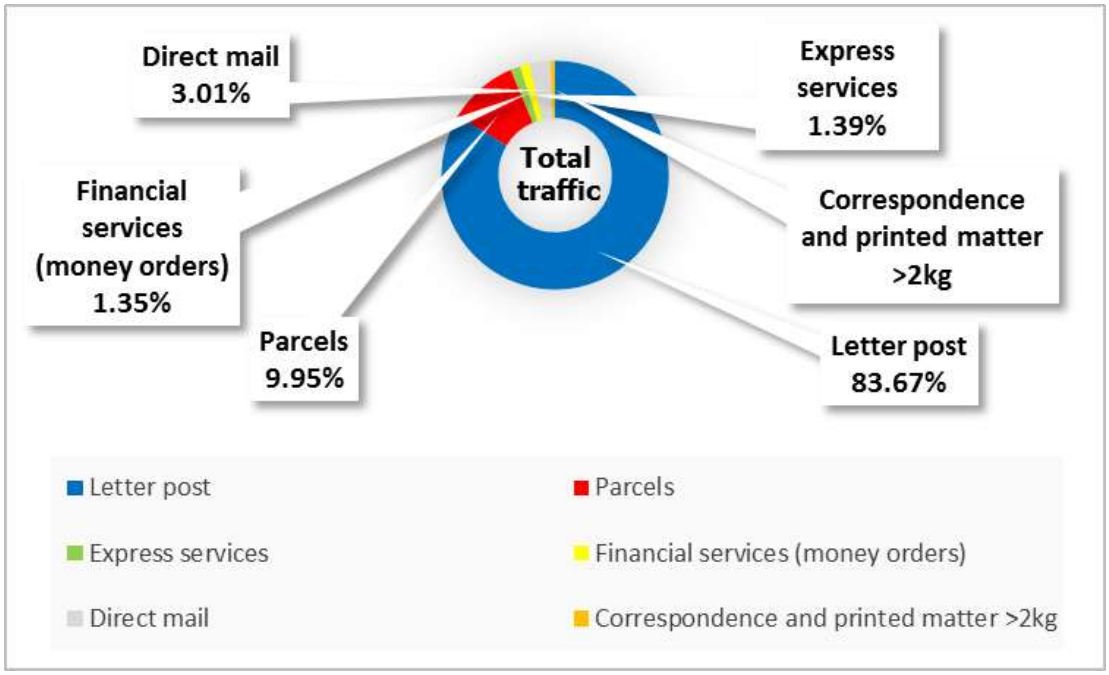


Exhibit 21 Distribution of domestic traffic in 2014

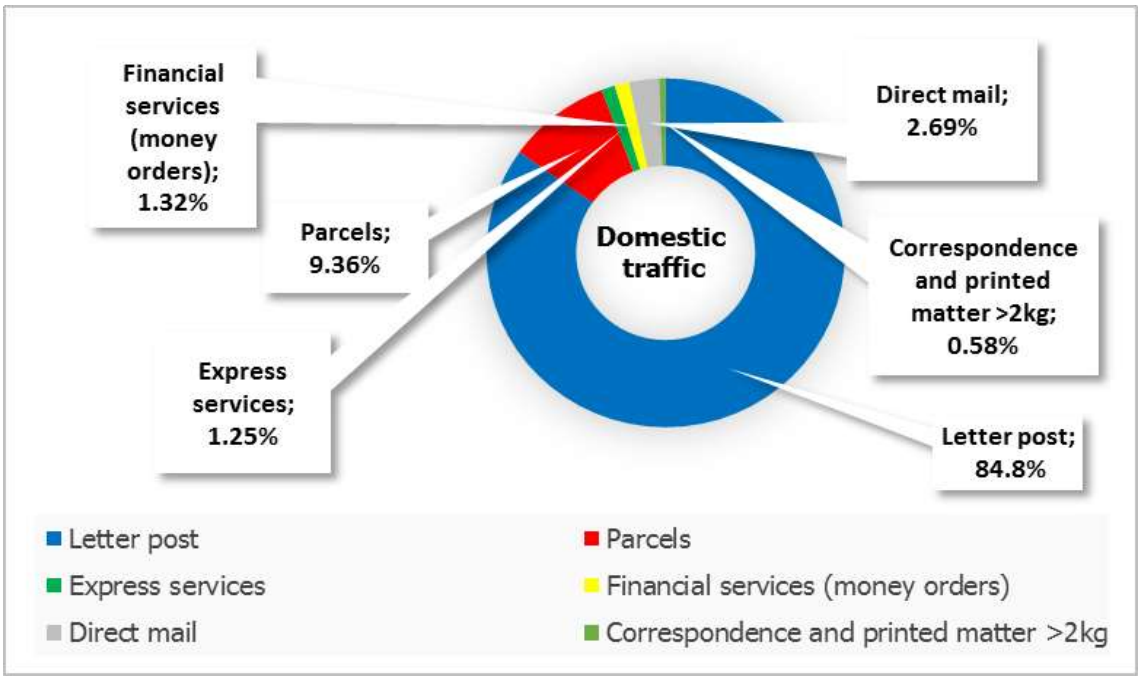
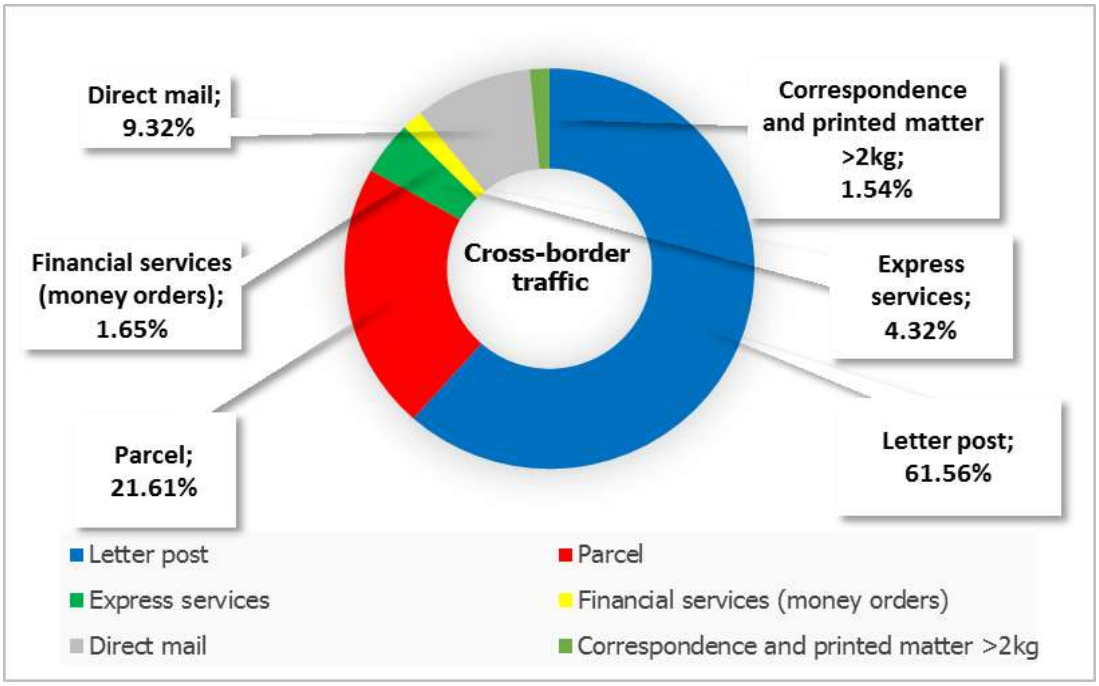


Exhibit 22 **Distribution of cross-border traffic in 2014**



Tables 10, 11 and 12 present comparatively the shares postal items within the total, domesctic and cross-border traffic between 2010 and 2014.

Table 10 **Share of various categories of postal items in the total postal traffic**

Indicators	2010	2011	2012	2013	2014
Letter post	93.42%	92.98%	93.61%	92.68%	83.67%
Parcels	4.25%	4.42%	4.58%	4.76%	9.95%
Express items	2.33%	2.60%	1.81%	2.56%	1.39%
Correspondence and printed matter >2kg , Financial services, Direct mail*	-	-	-	-	4.99%

Table 11 **Share of various categories of postal items in the domestic traffic**

Indicators	2010	2011	2012	2013	2014
Letter post	93.78%	93.29%	94.18%	92.97%	84.80%
Parcels	4.04%	4.22%	4.16%	4.61%	9.36%
Express items	2.18%	2.49%	1.66%	2.41%	1.25%
Correspondence and printed matter >2kg , Financial services, Direct mail*	-	-	-	-	4.59%

Table 12 **Share of various categories of postal items in the cross-border traffic**

Indicators	2010	2011	2012	2013	2014
Letter post	88.12%	87.85%	84.25%	88.03%	61.56%
Parcels	7.44%	7.78%	11.48%	7.08%	21.61%
Express items	4.44%	4.37%	4.27%	4.89%	4.32%

Correspondence and printed matter >2kg , Financial services, Direct mail*	-	-	-	-	12.51%

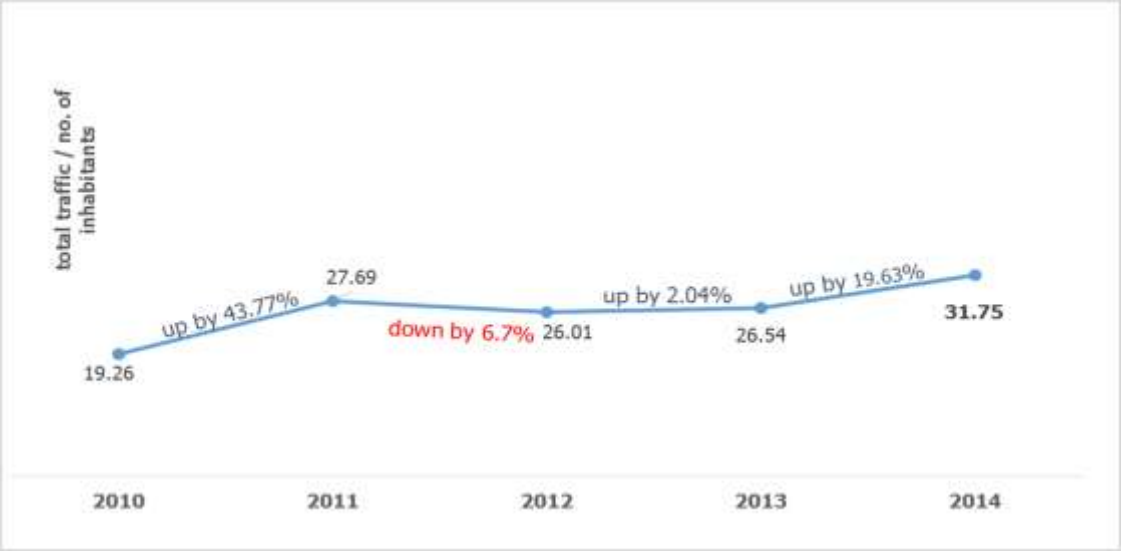
** In the previous years, correspondence and printed matter were included in the letterpost, while money orders – according to the legislation in force during the reference years – were not deemed postal items.*

4.3. Analysis of the postal traffic allocation

4.3.1 Average number of postal items per capita

Considering the figures of the total postal traffic in 2014 (**623,205,073**) and Romania's* population, one can count an average of **31.75** postal items per capita, 20% more than in 2013, a natural result of the decrease of Romania's population and of the traffic increase in the respective year.

Exhibit 23 Dynamics of the average number of postal items per capita (total traffic/no. of inhabitants) during 2010 – 2014



4.3.2 Average workload per postal worker

The annual workload in the postal sector is the ratio between the total traffic of postal items (**623,205,073**) and the number of employees in the postal sector (**36,795**).

In 2014, the annual workload was **16,937** postal items/employee/year, while in 2013, it was **13,726** postal items/employee/year (i.e. an increase by 23.4%).

The daily workload is the ratio between the annual workload and the number of working days in a year (252 in 2014).

In 2014, the daily average workload of a postal worker was **67** postal items/employee/day, while in 2013 it was **54** postal items/employee/day.

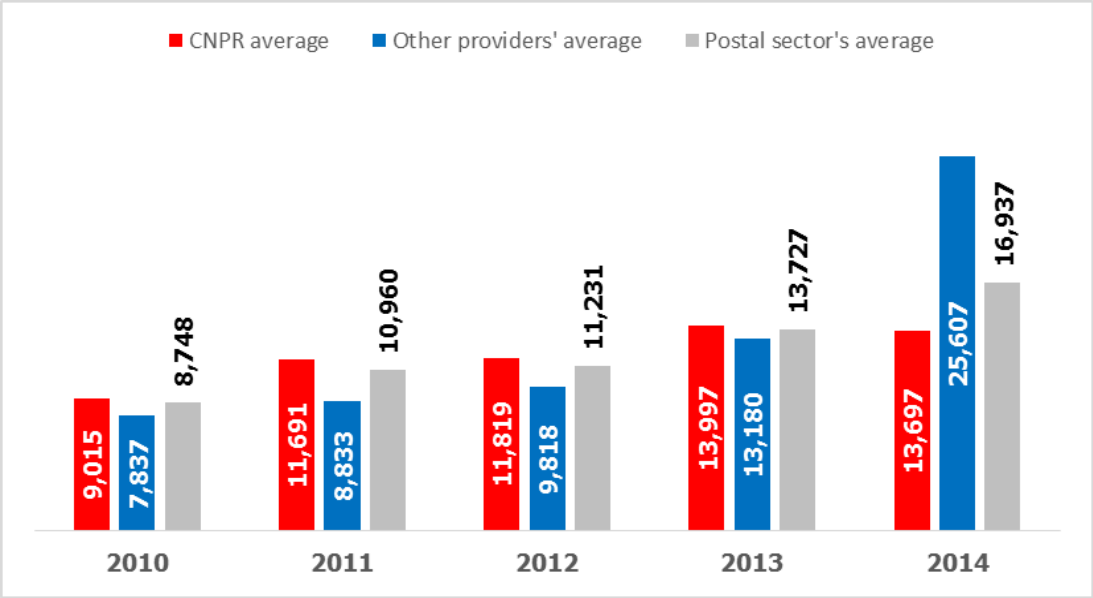
* According to the data provided by the National Institute of Statistics, Romania's population counted **19,629,223** people as of 31.12.2014.

Table 13 Workload of postal employees

Year	CNPR	OTHER PROVIDERS
2013	13,997 pi/employee/year 55 pi/employee/day	13,180 pi/employee/year 52 pi/employee/day
2014	13,697 pi/employee/year 54 pi/employee/day	25,607 pi/employee/year 102 pi/employee/day

*pi = postal items

Exhibit 24 Average workload of the postal employees, 2010-2014

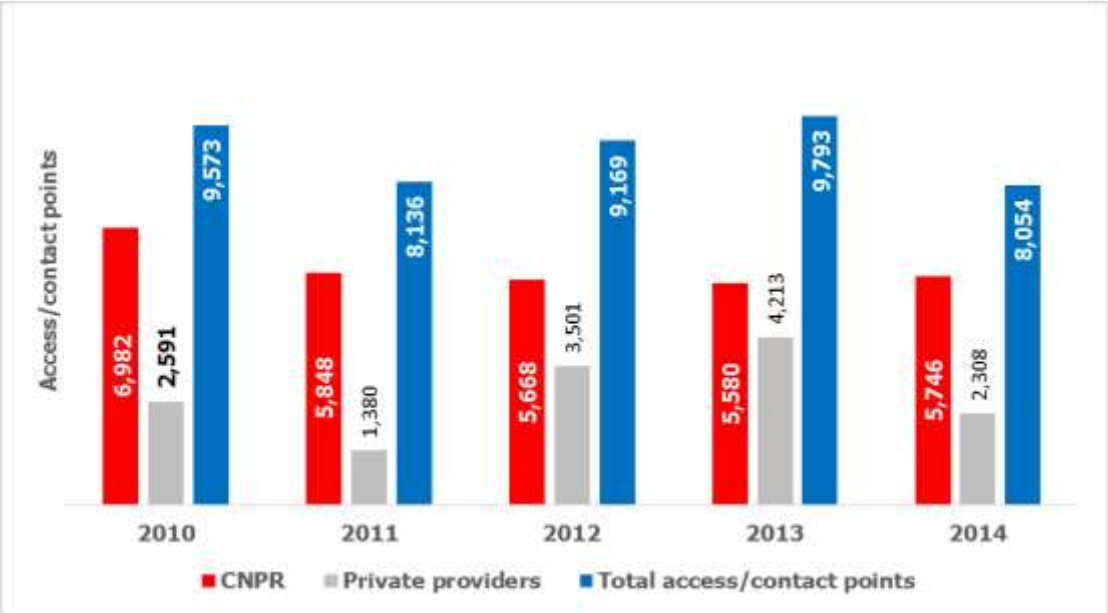


4.3.3. Analysis of postal networks

a) Postal coverage

In 2014, the postal network in Romania totalised **8,054** access and contact points served by personnel during public working hours, belonging both to the USP and to the other providers.

Exhibit 25 Number of CNPR's and other providers' access and contact points served by personnel during 2010-2014



The number of access and contact points served by personnel made available to the postal service users in 2014 decreased compared to 2013, this number being comparable to that of 2011.

b) Postal density

Postal density regards the number of access/contact points serving the population in a certain geographic area. Considering the characteristics of an access/contact point (whether it is served by personnel and has public working hours or not), the following situation was remarked, on a country level, in 2014:

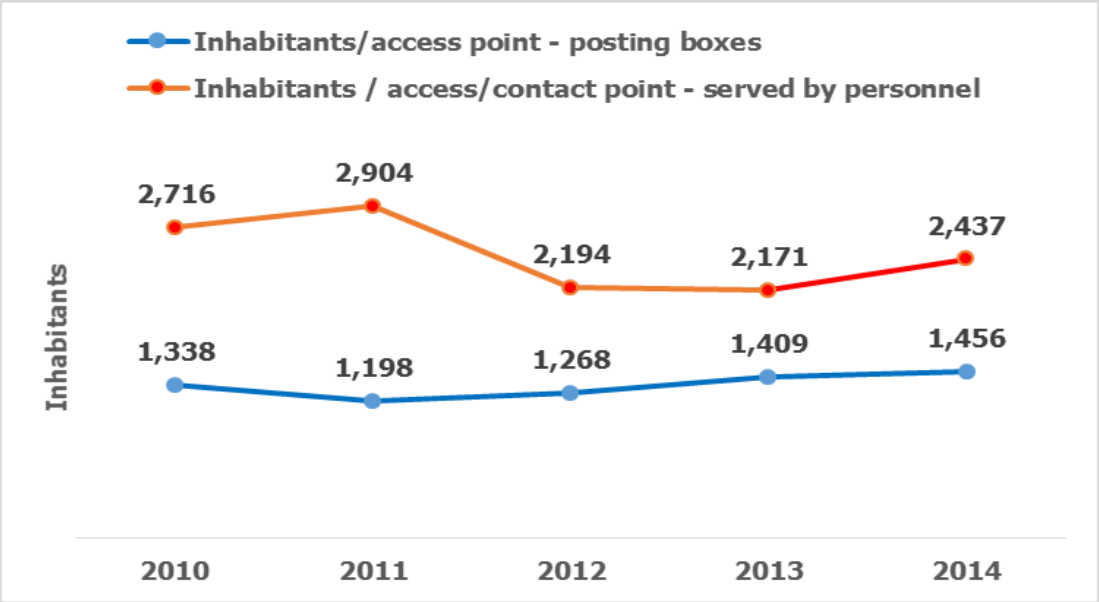
- one access/contact point served by personnel was made available for 2,437 inhabitants;
- CNPR ensured postal services by means of one access/contact point served by personnel – on average – for 3,416 inhabitants;
- CNPR made available, on average, one letterbox for 1,456 inhabitants.

In Bucharest[1]:

- one access/contact point served by personnel owned by the universal service provider was made available to 21,340 inhabitants;
- CNPR ensured, on average, one letterbox for 12,233 inhabitants.

As regards unmanned contact/access points, respectively posting boxes installed in public areas, there prove to be be owned by the universal service provider, this being the only provider that ensures services for unregistered postal items.

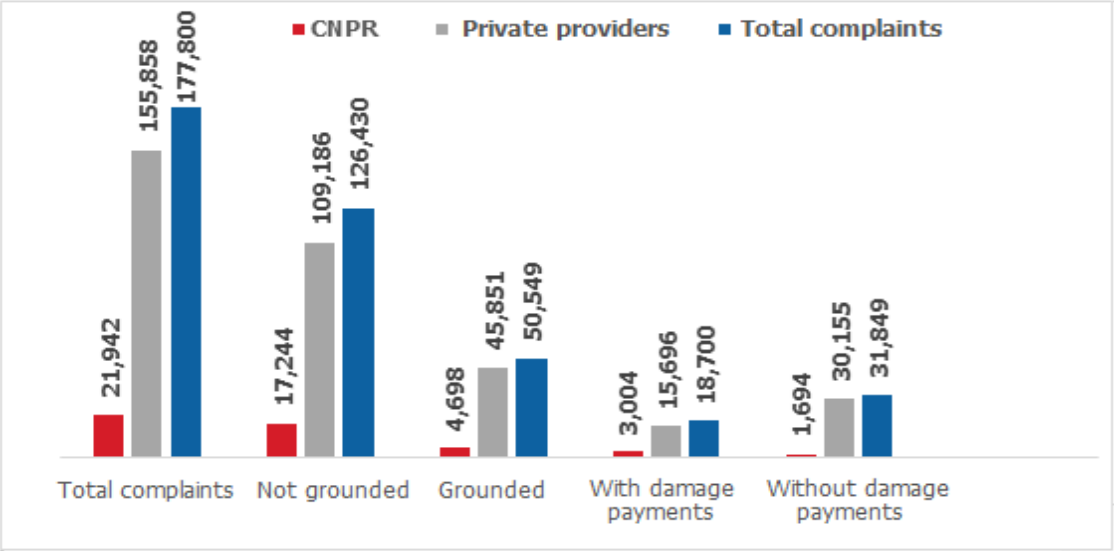
Exhibit 26 Dynamics of the postal density on a national level, 2010 – 2014



[1] According to the data provided by the National Statistics Institute the population of Bucharest, on 31.12.2014, amounted to 1,920,610.

4.3.4. Data regarding the complaints filed in relation to the provision of postal services

Exhibit 27 **Statistics of complaints from postal services users in 2014**



In 2014, **50,549** of the **177,800** complaints lodged proved to be grounded. Postal service providers paid damages amounting to RON **4,175,261** following the settlement of RON **18,700**.

Considering the total general traffic (**623,205,073** postal items) in proportion to the number of complaints, in 2014:

- one complaint was lodged per **3,505** postal items;
- one complaint per **12,329** postal items was grounded;
- one complaint per **4,929** postal items was ungrounded;
- on average, one of three grounded complaints was settled by payment of damages.

Considering the CNPR total traffic within the scope of universal service (**95,179,673** postal items) in proportion to the number of complaints (**10,851**), in 2014:

- one complaint was lodged per 8,772 postal items;
- one complaint per 48,810 postal items was grounded;
- one complaint per 10,693 postal items was ungrounded;
- on average, three out of five grounded complaints were settled by payment of damages.

Within the total number of complaints registered in 2014 (**177,800**), 71.10% were not-grounded (**126,430**). 61.41% of these were received by the private providers of postal services and 9.7% by the universal service provider.

Table 12 **Dynamics of complaints, 2013 – 2014**

Indicator	Grounded complaints	Ungrounded complaints	Complaints settled by damage payment	Complaints settled without damage payment	Total complaints
2013	24,815	99,191	9,581	15,234	124,006
2014	50,549	126,430	18,700	31,849	177,800
Dynamics (%)	**+ 103.70%**	**+ 27.46%**	**+ 95.18%**	**+109.06%**	**+43.38%**

4.4. Traffic of ancillary services

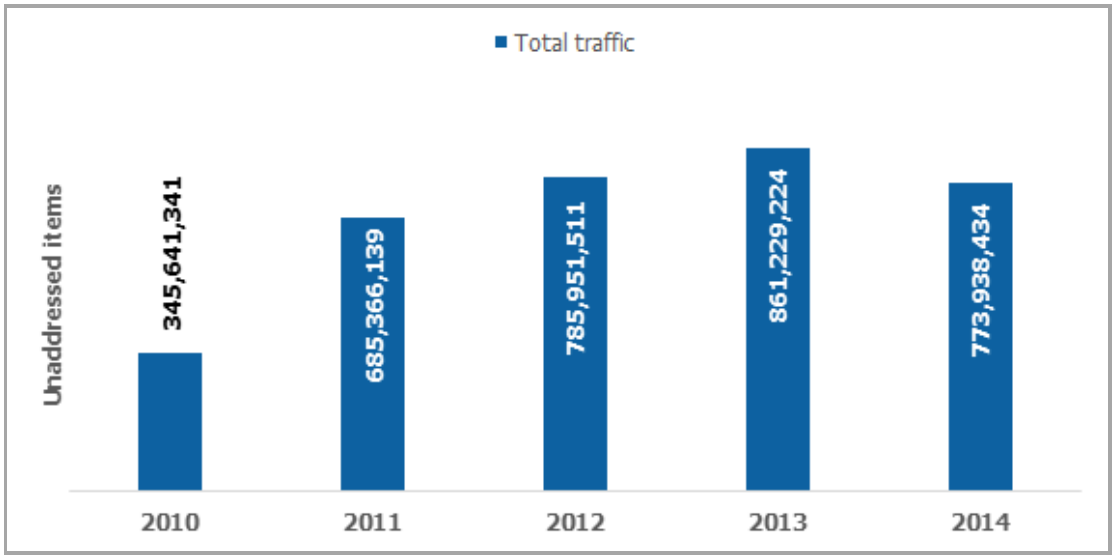
4.4.1. Traffic of domestic unaddressed mail items (non-classified)

Such items are not considered postal items, therefore they were not counted in the total postal traffic, but the corresponding data were collected and are analysed for statistical reasons.

This type of items include: flyers, brochures, posters, catalogues or other advertising and promoting materials. These items do not bear the name and address of the addressee, and therefore they are delivered upon certain criteria established by the sender (geographic, demographic, professional criteria etc.).

The total traffic of unaddressed advertising materials amounted to **773,938,434** items, of which **773,908,434** domestic items and **30,000** cross-border items.

Chart 28 Traffic of unaddressed mail items, 2010-2014



One can notice that – on this market segment, after a four-year sustained growth, 2014 witnessed a traffic decrease of more than 10% compared to 2013.

4.4.2. Traffic of hybrid mail items

Hybrid mail items are presented in a physical or electronic form by the sender (electronic mail, SMS, fax etc.), electronically processed by the service provider (decompressed, decrypted, archived etc.), and transmitted mainly electronically to the points in the provider's network located as close as possible to the final delivery addresses, wherefrom the items are delivered in physical form to the addressee.

In 2014, the total traffic of hybrid items amounted to **106,690** hybrid items, of which **91,264** domestic and **15,426** cross-border.

Table 12 Dynamics of the traffic of hybrid items, 2010 – 2014

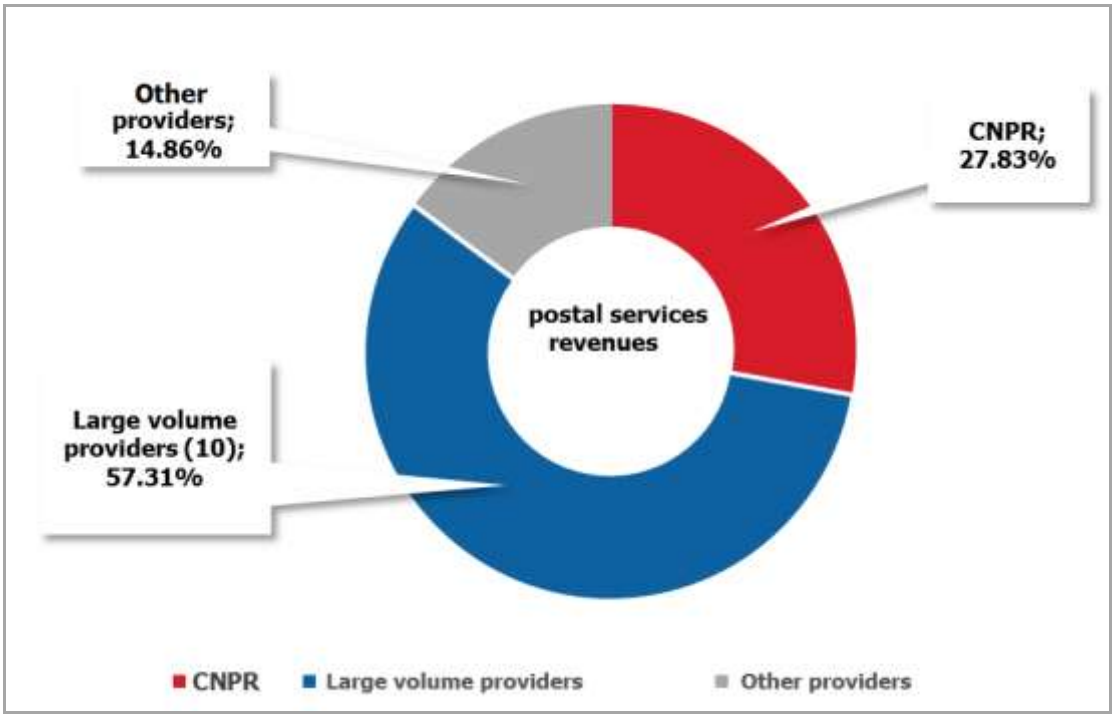
Indicator	Domestic	Cross-border	Total
2013	172,152	30,213	202,365
2014	91,264	15,426	106,690
Dynamics (%)	**- 46.98%**	**- 48.94%**	**- 47.28%**

5. Value of the postal market

In 2014, the postal services market totalised RON **2,299,842,833**, for a total traffic of **623,205,073** postal items.

In 2014, CNPR together with the next ten large volume providers on the postal market achieved more than 85% of this market value.

Exhibit 29 Distribution of the revenues of the postal providers in 2014



The first 10 providers (others than the Romanian Post National Company S.A.) in terms of revenues achieved from the postal services in 2014, are (in alphabetical order): ATLASSIB S.R.L., CARGUS INTERNATIONAL S.A., DYNAMIC PARCEL DISTRIBUTION S.A., DHL INTERNATIONAL S.R.L., FAN COURIER EXPRESS S.R.L., NEMO PROD COM IMPEX S.R.L., TNT ROMANIA S.R.L., UPS ROMANIA S.R.L., URGENT CURIER S.R.L., ZIPPER SERVICES S.R.L.

6. Postal services within the scope of universal service

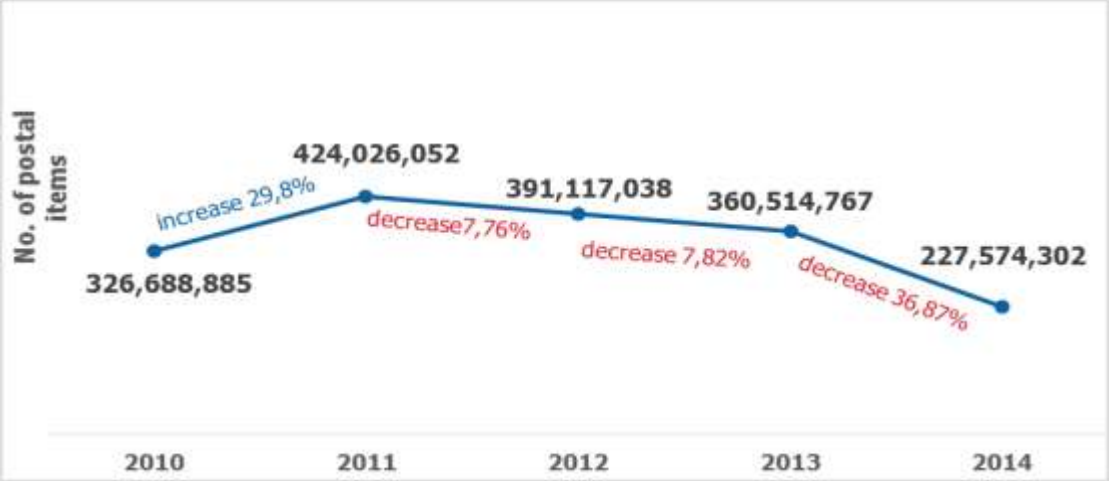
The postal services within the scope of universal service deal with:

- clearance, sorting, transport and delivery of domestic and cross-border correspondence items (including cecogrammes), printed matter items and direct mail items up to 2 kg;
- clearance, sorting, transport and delivery of domestic and cross-border postal parcels up to 10 kg;
- distribution of postal parcels weighing between 10 and 20 kg, sent from outside Romania to an address located on the Romanian territory;
- service for registered items;
- service for insured items.

6.1. Traffic of postal services within the scope of universal services

In 2014, the postal traffic of services within the scope of universal service registered **227,574,302** postal items, accounting for 36.52% of the year's total postal traffic (**623,205,073**), of which: **206,820,113** were domestic (34.88% of the 2014 total domestic traffic – **592,921,878** items) and **20,754,189** were cross-border (68.53% of the **30,283,195** cross-border postal items processed in 2014).

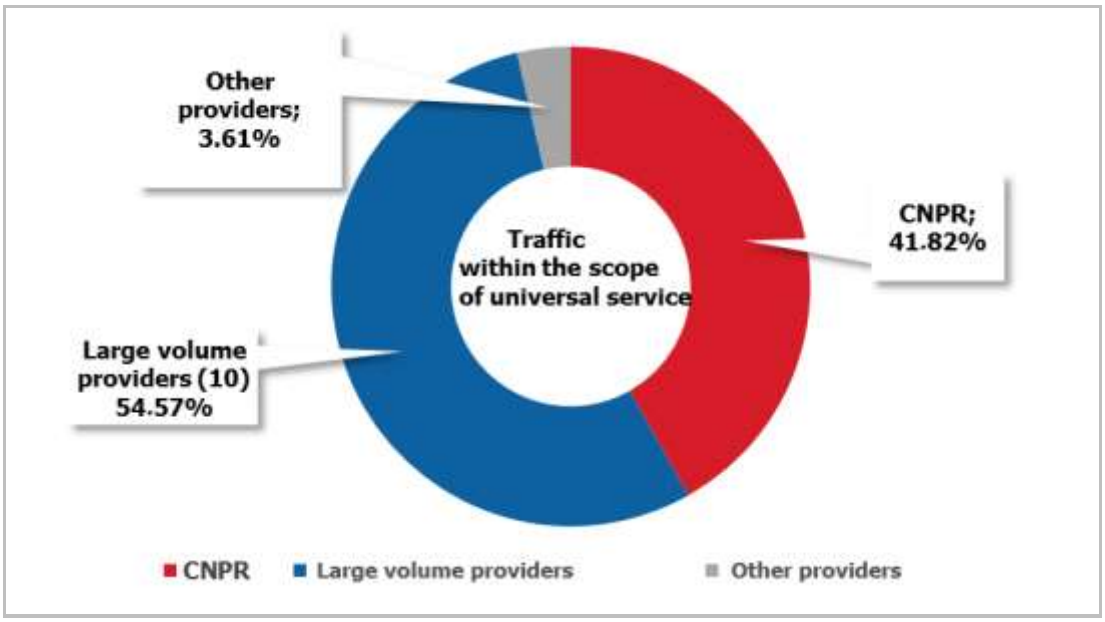
Exhibit 30 Dynamics of the total postal traffic within the scope of universal service, 2010-2014



Within the 2014 total postal traffic within the scope of universal service (**227,574,302** items), CNPR processed **95,179,673** items (41.82%), the next ten large volume providers in this segment processed **124,182,595** items (54.57%), while the other providers handled **8,212,034** items (3.61%).

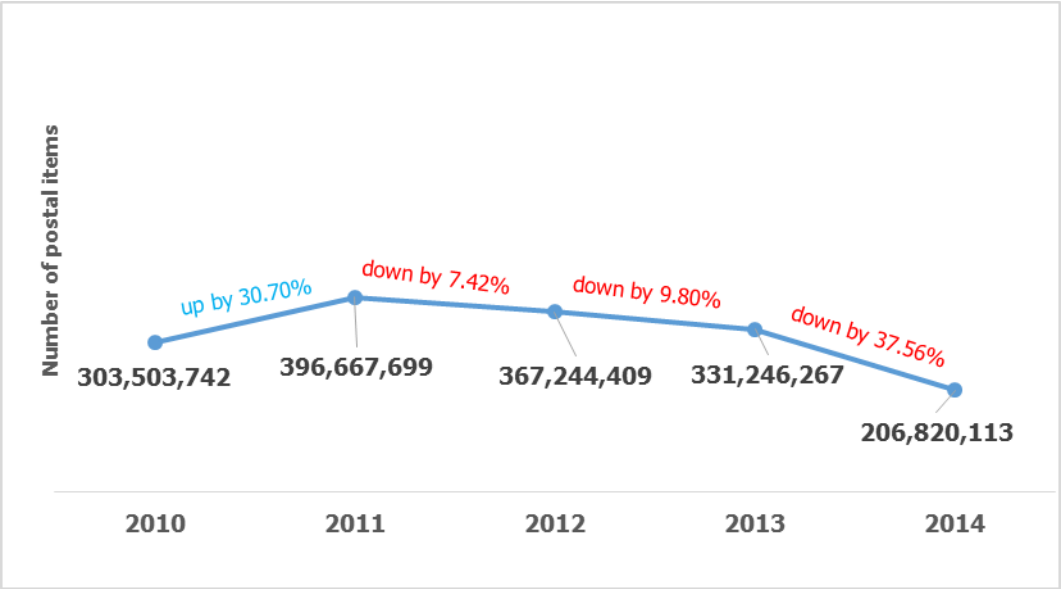
The first 10 providers (excluding CNPR S.A.) which registered the highest traffic within the scope of universal service in 2014 are (in alphabetical order): BARSAN TRANS S.R.L. SPANIA SUCURSALA SEBES, CARGUS INTERNATIONAL S.A., DYNAMIC PARCEL DISTRIBUTION S.A., S.C. FAN COURIER EXPRESS S.R.L., S.C. GLS GENERAL LOGISTICS SYSTEMS ROMANIA S.R.L., LOGISTICA TRANS ROM S.R.L., S.C. NEMO PROD COM IMPEX S.R.L., S.C. POSTMASTER S.R.L., POSTMASTER S.R.L., TOTAL POST MAIL SERVICES S.R.L., S.C. URGENT CURIER S.R.L.

Exhibit 31 Distribution of postal market within the scope of universal service among postal providers in 2014



The total domestic traffic within the scope of universal service faced significant decreases during 2010 – 2014, with 2014 reaching the lowest level in the past 5 years.

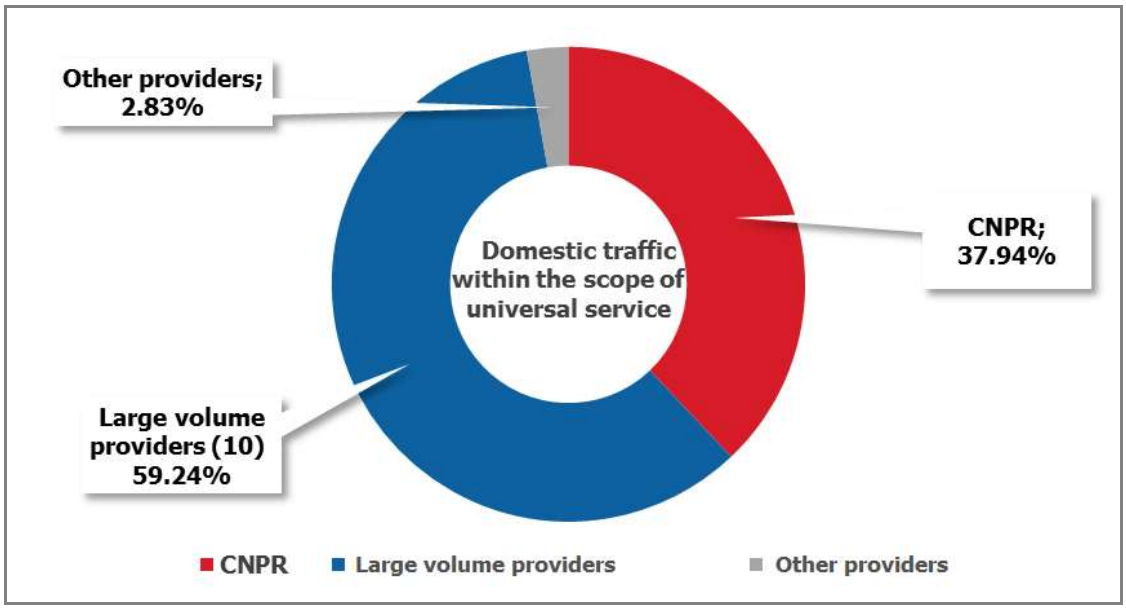
Exhibit 32 Dynamics of domestic postal traffic within the scope of universal service, 2010-2014



Within the 2014 domestic traffic within the scope of universal service (**206,820,113** items), CNPR processed **78,457,546** items (37.95%), the next ten large volume providers in this segment registered a traffic of **122,517,911** items (59.25%), while the other providers processed **5,844,656** items (2.83%).

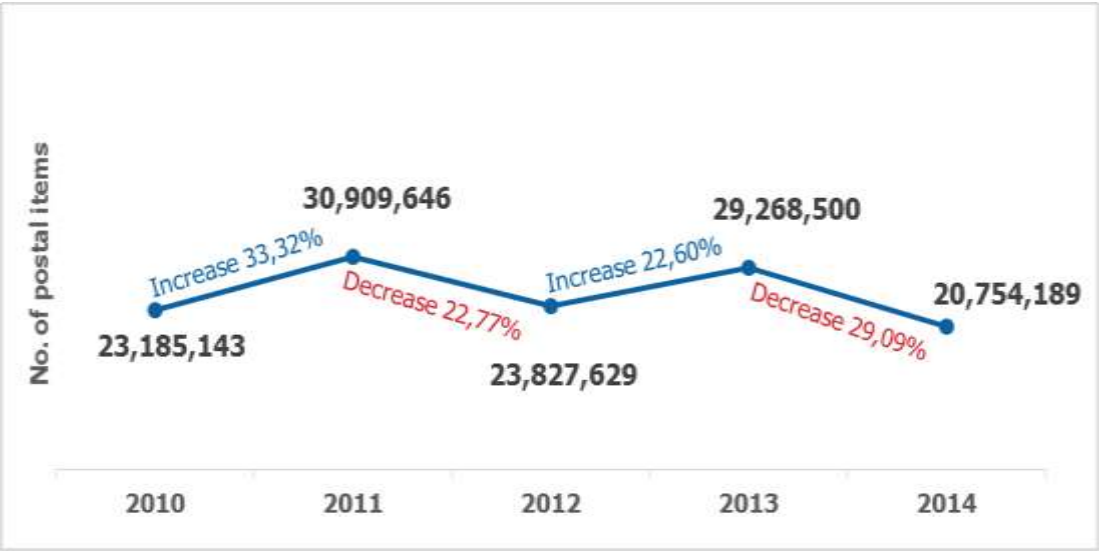
The first 10 providers (others than CNPR S.A.) which registered the highest domestic traffic within the scope of universal service in 2014 are (in alphabetical order): ASSOCIATED GROUP COMMUNICATIONS S.R.L., CARGUS INTERNATIONAL S.A., DYNAMIC PARCEL DISTRIBUTION S.A., FAN COURIER EXPRESS S.R.L., GLS GENERAL LOGISTICS SYSTEMS ROMANIA S.R.L., S.C. NEMO PROD COM IMPEX S.R.L., POSTMASTER S.R.L., SPRINT CURIER EXPRES S.R.L., TOTAL POST MAIL SERVICESS S.R.L., S.C. URGENT CURIER S.R.L.

Exhibit 33 Distribution of domestic postal market within the scope of universal service among postal providers in 2014



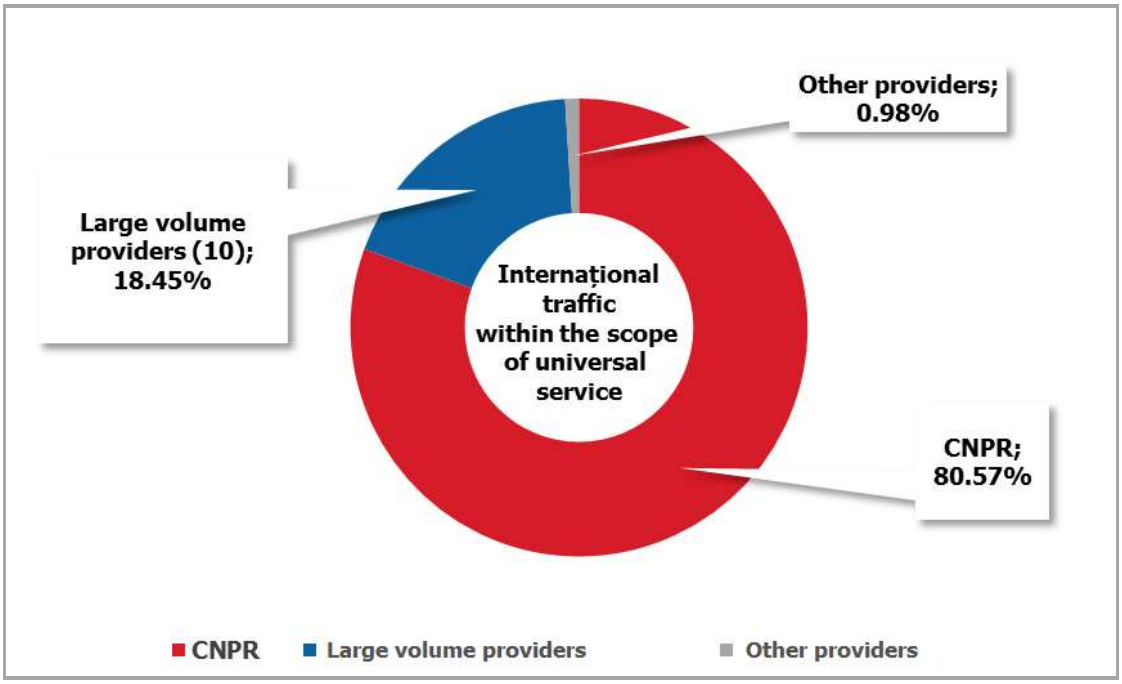
The cross-border total traffic within the scope of universal service was characterised by alternative increases and decreases during 2010 – 2014, with 2014 registering the lowest traffic of the past five years.

Exhibit 34 Dynamics of cross-border postal traffic within the scope of universal service, 2010-2014



Within the 2014 cross-border traffic within the scope of universal service (**20,754,189**), CNPR processed **16,722,127** items (80.57%), the next ten large volume providers dealt with **3,828,642** items (18.45%), while the other providers handled **203,420** items (0.98%).

Exhibit 35 **Distribution of cross-border postal market within the scope of universal service among postal providers in 2014**



The first 10 providers, others than CNPR S.A., which registered the highest cross-border traffic within the scope of universal service in 2014 are (in alphabetical order): ATLASSIB S.R.L., *BARSAN TRANS S.R.L. SPANIA SUCURSALA SEBES, DYNAMIC PARCEL DISTRIBUTION S.A., EXPRESS TRANSINTERNATIONAL S.R.L., FAN COURIER EXPRESS S.R.L., GLS GENERAL LOGISTICS SYSTEMS ROMANIA S.R.L., LOGISTICA TRANS ROM S.R.L., NEMO PROD COM IMPEX S.R.L., POSTA ATLASSIB CURIER RAPID S.R.L., TABITA TOUR S.R.L..*

Table 14 **Traffic of items within the scope of universal service in 2014**

Indicators/Providers	CNPR	Private providers	Total
Domestic	78,457,546	128,326,567	206,820,113
Cross-border	16,722,127	4,032,062	20,754,189
Total	95,179,673	132,394,629	227,574,302

Table 15 **Dynamics of CNPR traffic within the scope of universal service, 2013 – 2014**

Indicator	Domestic	Cross-border	Total
2013	255,700,474	19,791,023	275,491,497
2014	78,457,546	16,722,127	95,179,673
Dynamics (%)	**- 69.32%**	**- 15.51%**	**- 65.45%**

Exhibit 36 **CNPR traffic within the scope of universal service, 2010 – 2014**

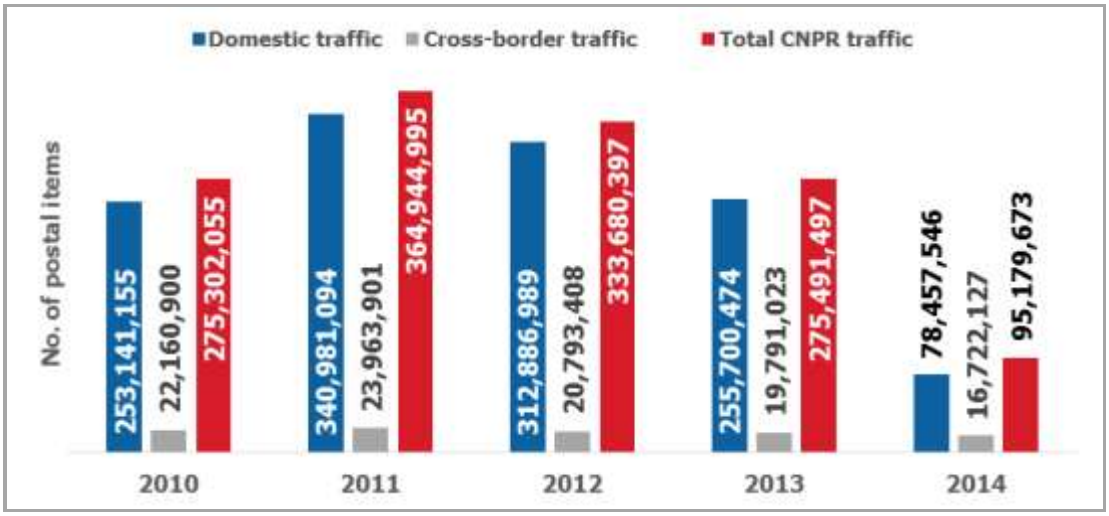
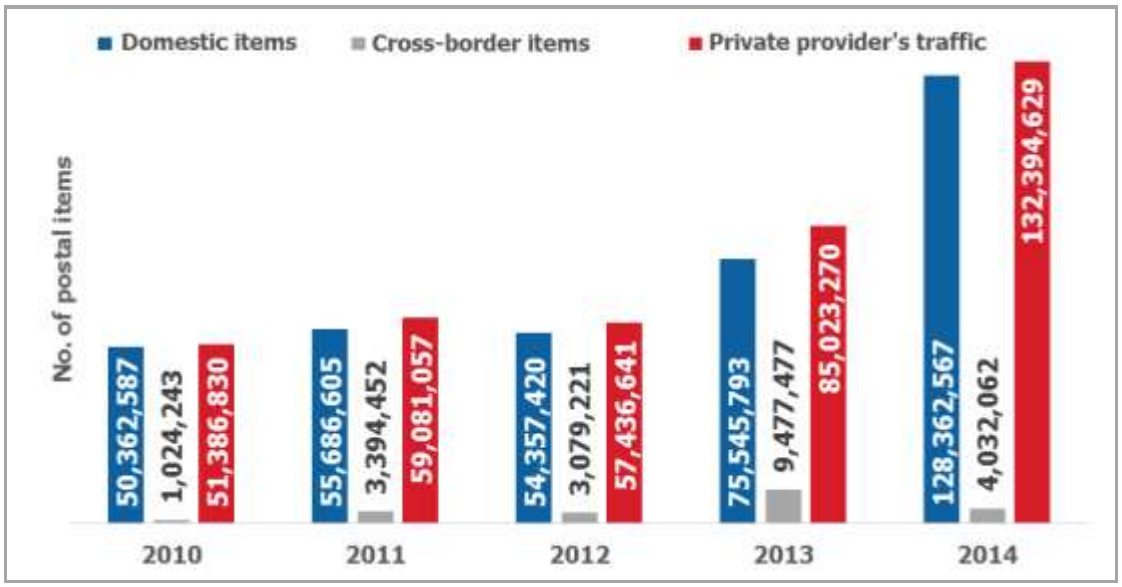


Table 16 **Dynamics of private providers' traffic within the scope of universal service, 2013 – 2014**

Indicator	Domestic	Cross-border	Total
2013	75,545,793	9,477,477	85,023,270
2014	128,362,567	4,032,062	132,394,629
Dynamics (%)	**- 69.91%**	**- 57.45%**	**- 55.72%**

Exhibit 37 **Private providers' total traffic within the scope of universal service, 2010 – 2014**



The analysis of the traffic within the scope of universal service processed by private providers shows that the traffic kept growing in the last five years, with 2014 registering 50% increase compared to 2013.

41.8% (i.e. **227,574,302** items) of the 2014 total traffic in this segment was processed by the universal service provider, while private providers dominated the market, with more than 58% of the total traffic.

6.2 Structural analysis of the traffic of postal services within the scope of universal service

6.2.1 Traffic of letter-post items within the scope of universal service

The letter-post services include items of correspondence (simple, registered, insured, cecogrammes), printed matter items, weighing up to 2 kg.

In 2014, letter-post traffic accounted for 85.58% of the total postal traffic within the scope of universal service (**227,574,302**) and counted **194,758,165** items, of which:

- **177,883,234** domestic items i.e. 86% of the total domestic traffic within the scope of universal service (**206,820,113**);
- **16,874,931** cross-border items, i.e. 81.31% of the total cross-border traffic within the scope of universal service (**20,754,189**).

CNPR generated 47.76% of the letter-post traffic within the scope of universal service.

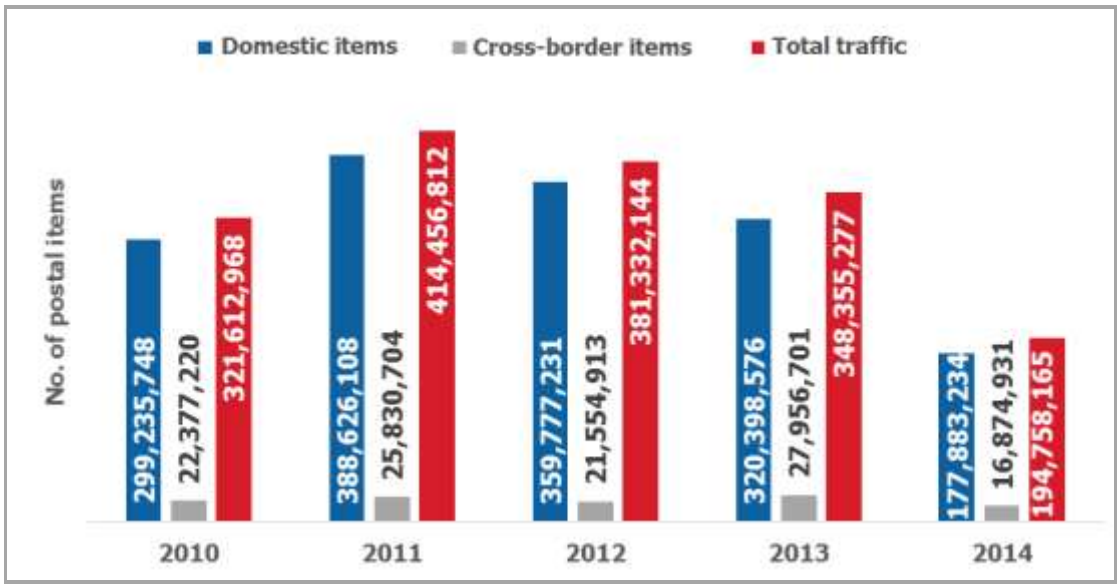
Table 17 Traffic of letter-post items within the scope of universal service in 2014

Indicators/Providers	CNPR	Other providers	Total
Domestic	76,608,789	101,274,445	177,883,234
Cross-border	16,399,078	475,853	16,874,931
Total	93,007,867	101,750,298	194,758,165

Table 18 Dynamics of letter-post traffic within the scope of universal service, 2013 – 2014

Indicators	Domestic	Cross-border	Total
2013	320,398,576	27,956,701	348,355,277
2014	177,883,234	16,874,931	194,758,165
Dynamics (%)	**- 44.48%**	**- 39.64%**	**- 44.09%**

Exhibit 38 Traffic of letter-post items within the scope of universal service, 2010 – 2014



a) Structure and dynamics of the correspondence* traffic within the scope of universal service

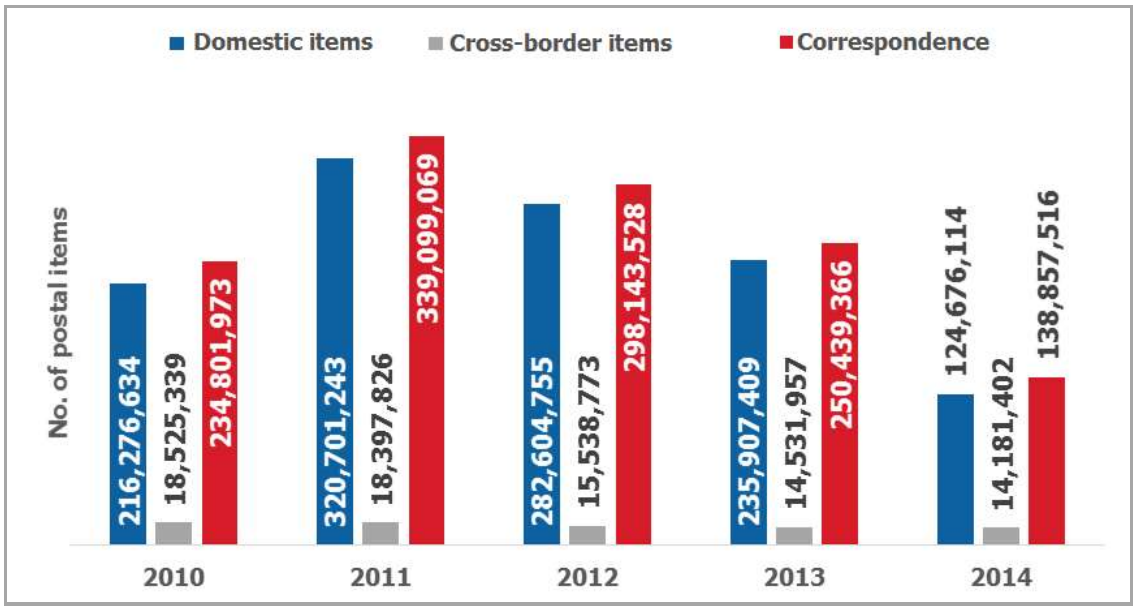
Table 19 **Structure of the correspondence traffic in 2014**

Indicators/Providers	CNPR	Other providers	Total
Domestic	38,160,036	86,516,078	124,676,114
Cross-border	13,919,674	261,728	14,181,402
Total	52,079,710	86,777,806	138,857,516

Table 20 **Dynamics of the correspondence traffic, 2013 – 2014**

Indicators	Domestic	Cross-border	Total
2013	235,907,409	14,531,957	250,439,366
2014	124,676,114	14,181,402	138,857,516
Dynamics (%)	**- 47.15%**	**- 2.41%**	**- 44.55%**

Exhibit 39 **Correspondence traffic during 2010-2014**



b) Dynamics of the traffic of printed matter items* within the scope of universal service

In 2014, the traffic of printed matter items decreased dramatically, by more than 40% compared to 2013, and all the traffic of printed matter items within the scope of universal service (87.56%) was almost entirely achieved by the universal service provider.

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* **correspondence item** – a communication which is written, printed, impressed or recorded on any kind of physical support, to be conveyed and delivered, by non-electronic means, to the address indicated by the sender on the respective support or on its wrapping. Books, catalogues, newspapers and periodicals shall not be regarded as items of correspondence.

* **Printed matter items** - postal items consisting of books, periodicals, newspapers, catalogues, geographic maps, music scripts etc.

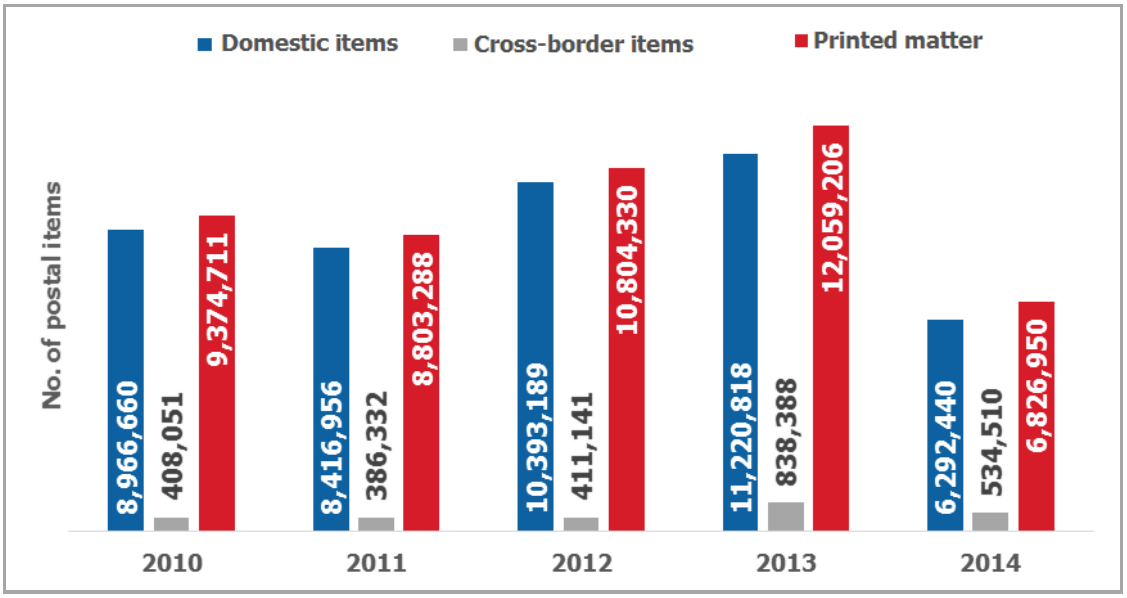
Table 21 **Structure of the printed matter traffic in 2014**

Indicators/Providers	CNPR	Other providers	Total
Domestic	5,443,689	848,751	6,292,440
Cross-border	534,407	103	534,510
Total	5,978,096	848,854	6,826,950

Table 22 **Dynamics of printed matter items during 2013 – 2014**

Indicators	Domestic	Cross-border	Total
2013	11,220,818	838,388	12,059,206
2014	6,292,440	534,510	6,826,950
Dynamics (%)	**- 43.92%**	**- 36.25%**	**- 43.39%**

Exhibit 40 **Printed matter traffic during 2010-2014**



c) Structure and dynamics of registered items traffic*

See below the features of the 2014 traffic of registered items:

Table 23 **Structure of the registered items (no. of items) in 2014**

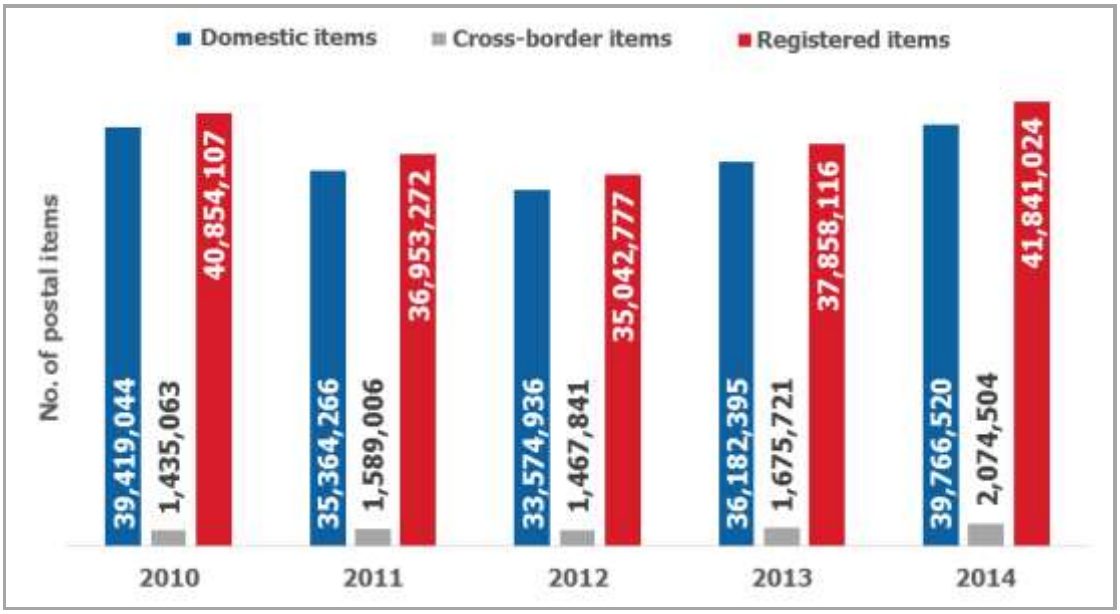
Indicators/Providers	CNPR	Other providers	Total
Domestic	32,922,583	6,843,937	39,766,520
Cross-border	1,934,214	140,290	2,074,504
Total	34,856,797	6,984,227	41,841,024

* **Registered items service** – a postal service providing a flat-rate guarantee against risks of loss, theft, total or partial destruction or damage of the postal item, and supplying the sender, upon request, with proof on the handing in of the postal item to the access point or of its delivery to the addressee

Table 24 **Dynamics of registered items, 2013 – 2014**

Indicators	Domestic	Cross-border	Total
2013	36,182,395	1,675,721	37,858,116
2014	38,766,520	2,074,504	41,841,024
Dynamics (%)	**+ 9.91%**	**+ 23.79%**	**+ 10.52%**

Exhibit 41 **Registered items traffic, 2010-2014**



d) Structure and dynamics of insured items traffic* within the scope of universal service

Table 25 **Structure of insured items traffic in 2014**

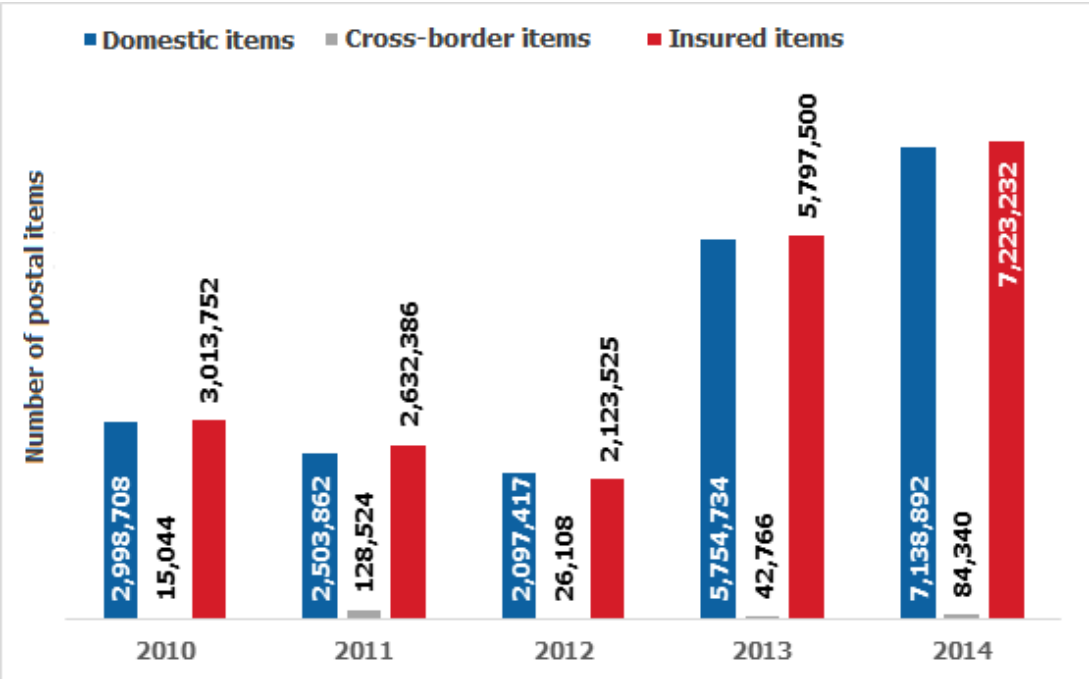
Indicators/Providers	CNPR	Other providers	Total
Domestic	73,213	7,065,679	7,138,892
Cross-border	10,608	73,732	84,340
Total	83,821	7,139,411	7,223,232

Table 26 **Dynamics of insured items, 2013 – 2014**

Indicators	Domestic	Cross-border	Total
2013	5,754,734	42,766	5,797,500
2014	7,138,892	84,340	7,223,232
Dynamics (%)	**+ 24.05%**	**+ 97.21%**	**+ 24.59%**

* **Insured items service** – a postal service insuring the postal item for the value declared by the sender in the event of loss, theft, total or partial destruction, or damage, against an amount equal to the value declared by the sender.

Exhibit 42 **Insured items traffic, 2010 - 2014**



e) Traffic of postal items intended for persons with sight impairment (cecogrammes)

Cecogrammes are postal items up to 7 kg, such as an open item containing a letter intended for the blind and sight impaired, imprinted on a firm paper or similar material, a cliché with cecography signs and sound recordings or special paper intended for blind or persons with sight impairment, if sent by or to an institute for persons with sight impairment. The Acts of the Universal Postal Union provide that items in this category are free of charge.

In 2014, the traffic of postal items intended for persons with sight impairment (**9,443** cecogrammes) was exclusively achieved by CNPR and consisted of:

- **9,268** domestic items
- only **175** cross-border items were sent from Romania to an addresses located in another country.

f) Distribution of letter-post items

In order to provide an overview of the letter-post items within the scope of universal service, by the shares of each category of items and by their origin, Exhibits 43, 44 and 45 display the distribution of the letter-post items – domestic and cross-border – within the scope of universal service.

Exhibit 43 **Distribution of letter-post items (total) within the scope of universal service in 2014**

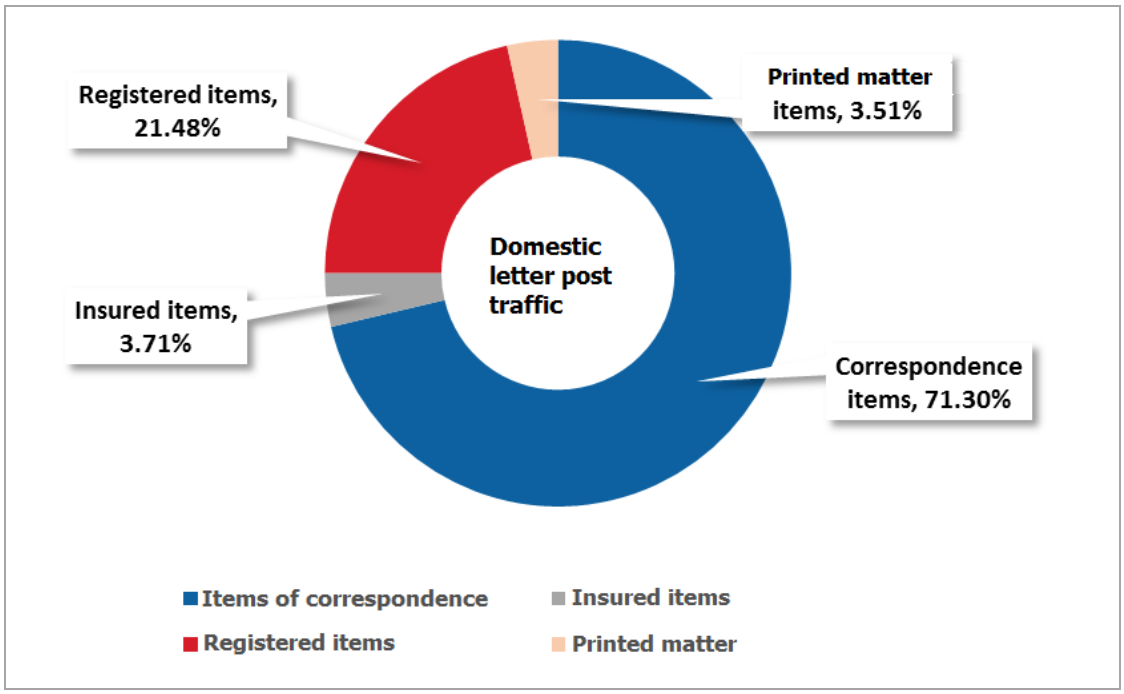


Exhibit 44 **Distribution of domestic letter-post items within the scope of universal service in 2014**

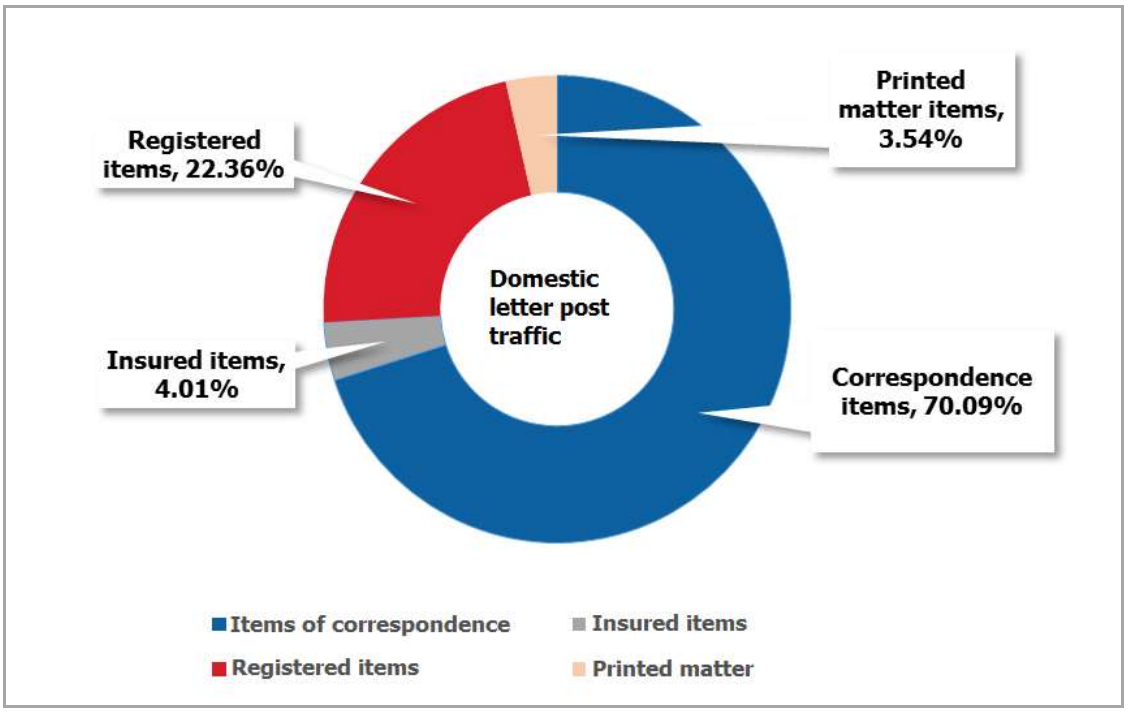
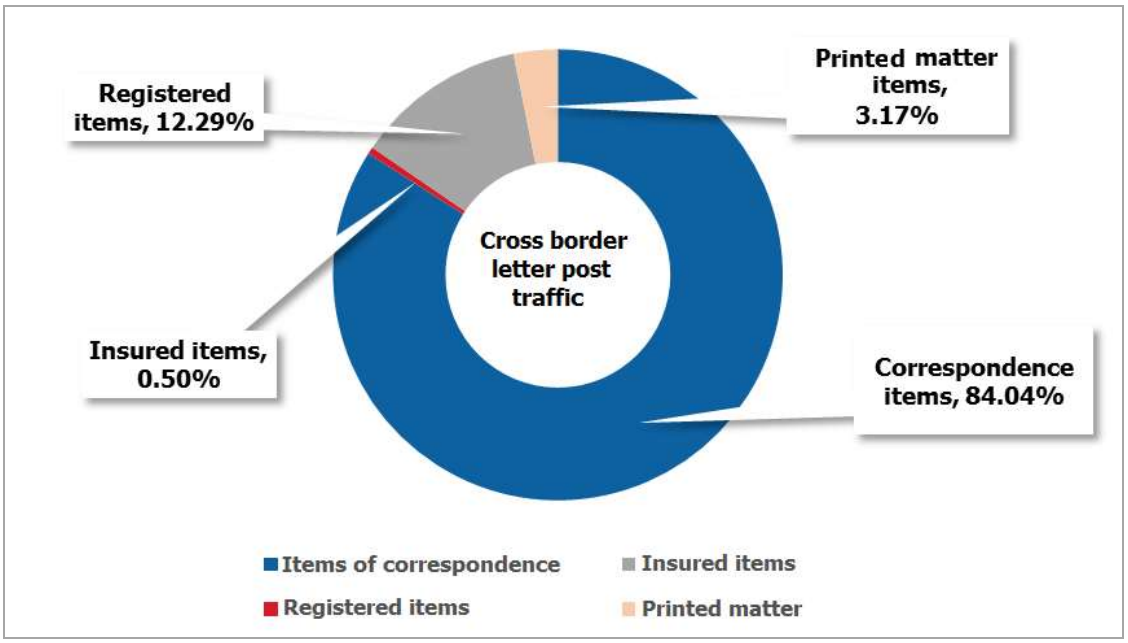


Exhibit 45 **Distribution of cross-border letter-post items within the scope of universal service in 2014**



6.2.2 Parcel traffic

The traffic of parcels within the scope of universal service consists of:

- domestic and cross-border postal parcels between 2 kg and 10 kg;
- postal parcels weighing between 10 kg and 20 kg sent from outside Romania to an address located on its territory.

In 2014, the total parcel traffic within the scope of universal service amounted to **32,816,137** items, accounting for 14.42% of the whole traffic within the scope of universal service (**227,574,302**).

The domestic parcel traffic counted **28,936,879** items and stands for 13.99% of the total domestic traffic within the scope of universal service (**206,820,113**), whereas the cross-border traffic amounted to **3,879,258** items, accounting for 12.81% of the whole cross-border traffic within the scope of universal service (**30,283,195**).

Table 27 presents comparatively the traffic of parcels between 2 kg and 10 kg, respectively 10-20 kg, sent from outside Romania to an address located on its territory, processed by CNPR and by the other postal service providers in the market:

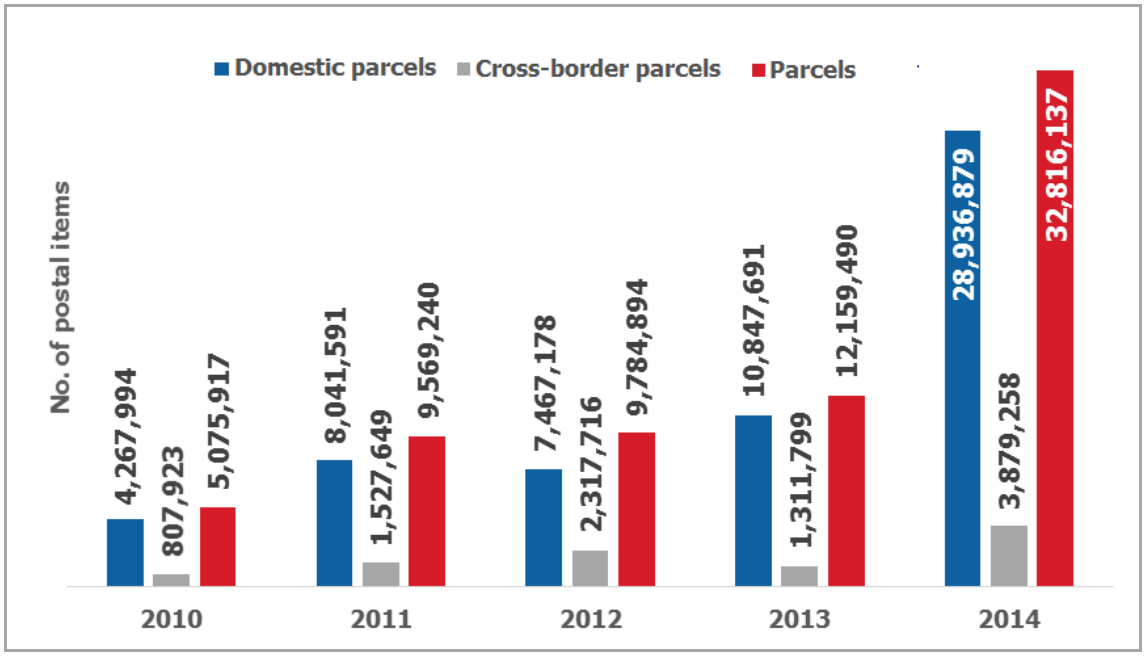
Table 27 **Structure of parcels in 2014**

Indicators/Providers	CNPR	Other providers	Total
Domestic	1,848,757	27,088,122	28,936,879
Cross-border	323,049	3,556,209	3,879,258
Total	2,171,806	30,644,331	32,816,137

Table 28 **Dynamics of the postal parcel traffic, 2013 – 2014**

Indicators	2011	2012	Dynamics (%)
Domestic	10,847,691	28,936,879	**+ 166.75%**
Cross-border	1,311,799	3,879,258	**+ 195.72%**
Total	12,159,490	32,816,137	**+ 169.88%**

Exhibit 46 **Traffic of parcels within the scope of universal service, 2010 – 2014**



Whereas during 2010 – 2013, the parcel traffic kept a moderately growing trend, in 2014 the parcel traffic registered an increase of almost 170%, being the market segment with the highest increase in 2014.

7. Postal services outside the scope of universal service

Postal services outside the scope of universal service include:

- items of correspondence, printed matter items and parcel items with supplementary characteristics compared to the postal services within the scope of universal service (Cash on delivery, Change of Destination, Special Delivery, Advice of Delivery, Express);
- items of correspondence and printed matter items exceeding 2 kg;
- postal parcels weighing between 10 and 50 kg;
- cross-border postal items weighing between 10 and 50 kg sent from Romania to an address located outside its territory;
- cross-border postal items weighing between 20 and 50 kg;
- paper money order;
- direct mail items.

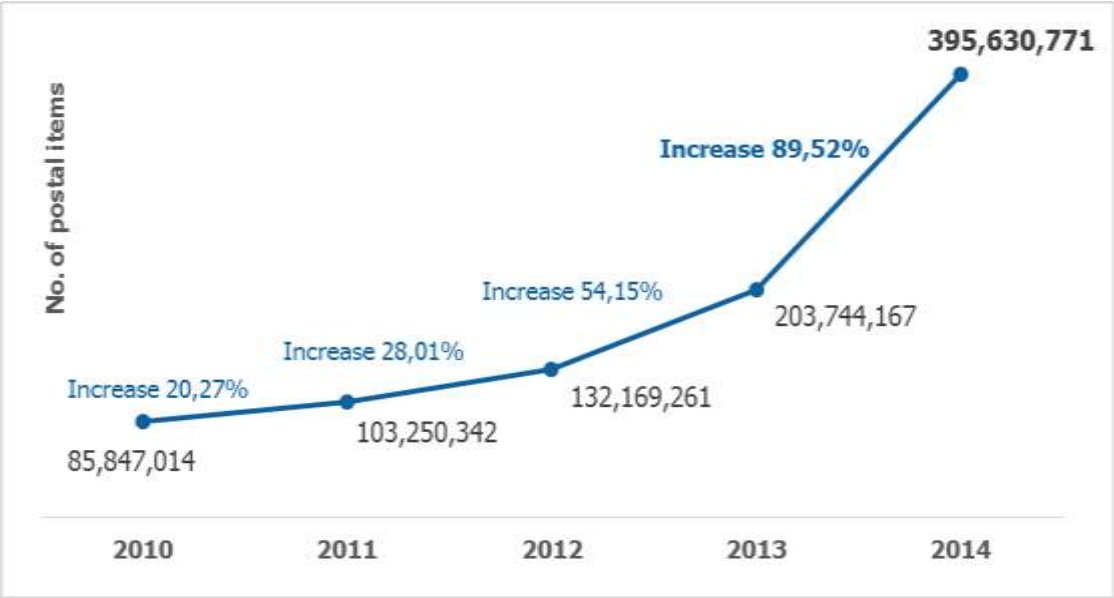
7.1. Postal traffic of services outside the scope of universal service

The 2014 postal traffic of services outside the scope of universal service amounted to **395,630,771** items, i.e. 63.48% of the year's total postal traffic (**623,205,073**) out of which:

- **386,101,765** domestic postal items, i.e. 97.59% of the total postal traffic outside the scope of universal service;
- **9,529,006** cross-border postal items, i.e. 2.41% of the total postal traffic outside the scope of universal service.

Exhibit 47 illustrates the dynamics of the postal traffic of services outside the scope of universal service in the 2010-2014 timeframe.

Exhibit 47 Dynamics of the total postal traffic outside the scope of universal service, 2010-2014



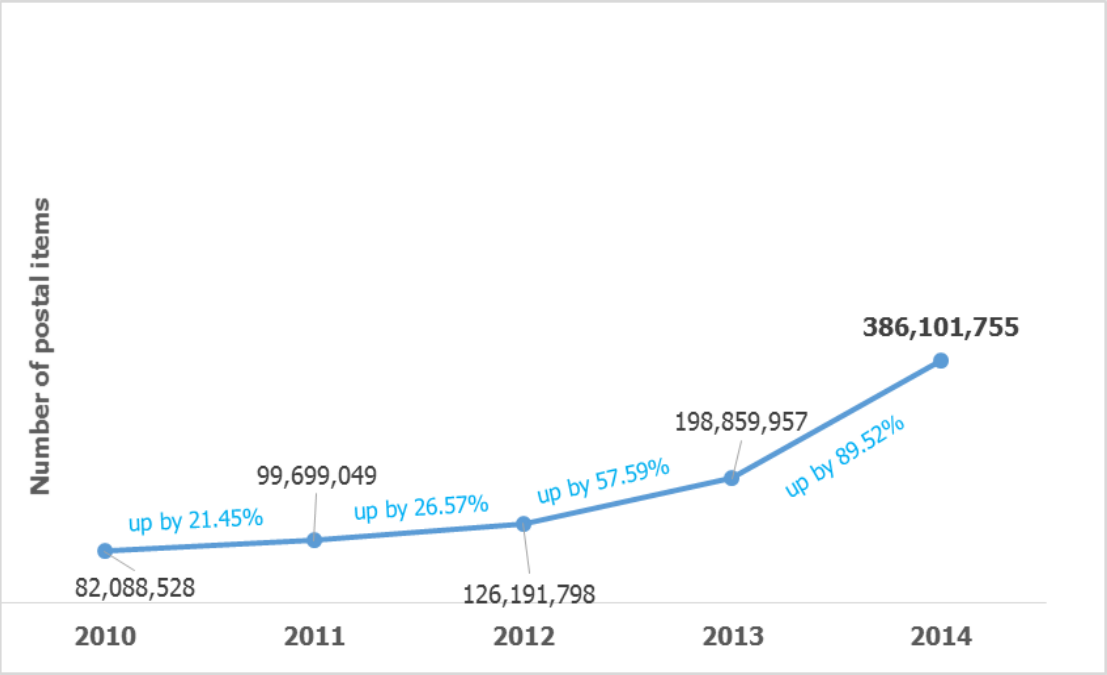
The dynamics of the total traffic outside the scope of universal service show that in the past five years this sector followed an ascending trend, registering significant increases especially in the last two years, in 2014 increasing with almost 90% compared to 2013.

Within the 2014 total postal traffic outside the scope of universal service (**395,630,771** items), the first ten large volume providers in the whole market processed **375,865,521** items, accounting for 95% of the total traffic processed in this market segment.

The first 10 providers which registered the highest traffic outside the scope of universal service in 2014 are (in alphabetical order): CARGUS INTERNATIONAL S.A., ROMANIAN POST NATIONAL COMPANY S.A., DHL INTERNATIONAL ROMANIA S.R.L, FAN COURIER EXPRESS S.R.L., GLS GENERAL LOGISTICS SYSTEMS ROMANIA S.R.L., POSTMASTER S.R.L., S.C. POSTA ATLASSIB CURIER RAPID S.R.L., STAR STORAGE S.A., TOTAL POST MAIL SERVICES S.R.L., URGENT CURIER S.R.L.

The domestic traffic outside the scope of universal service followed the same ascending trend in the past five years as the total traffic in this segment, registering in 2014 the highest increase (exceeding 94.16%) and the highest traffic volume (**386,101,765).**

Exhibit 48 Dynamics of domestic postal traffic outside the scope of universal service, 2010-2014

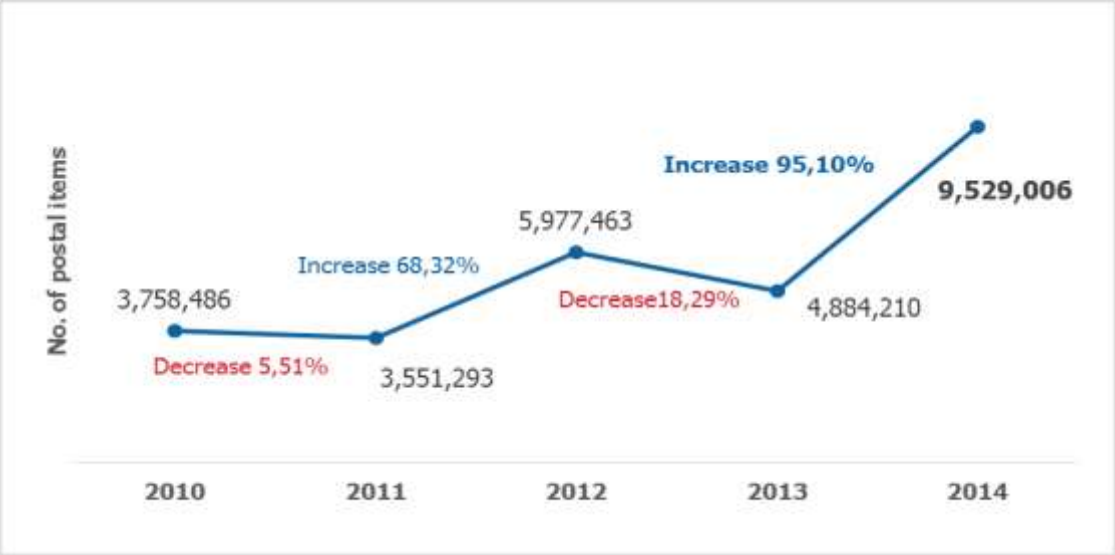


Within the 2014 domestic traffic outside the scope of universal service (**386,101,765** items), the first ten large volume providers in the whole market processed **375,865,521** items, i.e. 97.35% of the total domestic traffic processed in this market segment.

The first 10 providers which registered the highest domestic traffic outside the scope of universal service in 2014 are (in alphabetical order): CARGUS INTERNATIONAL S.A., ROMANIAN POST NATIONAL COMPANY S.A., DYNAMIC PARCEL DISTRIBUTION S.A., FAN COURIER EXPRESS S.R.L., GLS GENERAL LOGISTICS SYSTEMS ROMANIA S.R.L., POSTMASTER S.R.L., POSTA ATLASSIB CURIER RAPID S.R.L., STAR STORAGE S.A., TOTAL POST MAIL SERVICES S.R.L., URGENT CURIER S.R.L..

The cross-border total traffic outside the scope of universal service during 2010 – 2014 was characterised by alternative increases and decreases, 2014 registering the highest traffic of the past five years (**9,529,006**).

Exhibit 49 **Dynamics of cross-border postal traffic outside the scope of universal service, during 2010-2014**



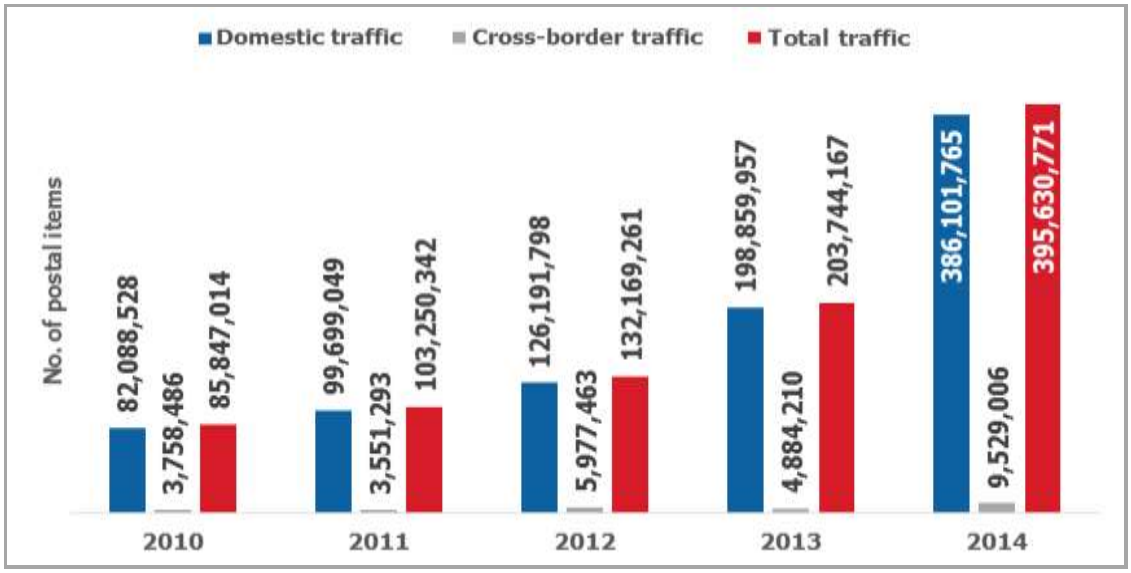
The first ten large volume providers in this market segment processed **9,218,357** items within the 2014 cross-border postal traffic (**9,529,006** items), accounting for 96.74% of the total traffic of processed cross-border items, while the other providers handled **310,649** items, i.e. 3.26%.

The first 10 providers which registered the highest cross-border traffic in 2014 are (in alphabetical order): BEST TRANS COURIER S.R.L., ROMANIAN POST NATIONAL COMPANY S.A., DHL INTERNATIONAL ROMANIA S.R.L., ECOUNT FOR YOU S.R.L., INTERNATIONAL ROMEXPRESS SERVICE LTD S.R.L., POSTA ATLASSIB CURIER RAPID S.R.L., ROMFOUR TUR S.R.L., TNT ROMANIA S.R.L., WORLD MEDIATRANS S.R.L., UPS ROMANIA S.R.L.

Table 29 **Dynamics of the traffic outside the scope of universal service, 2013– 2014**

Indicators	Domestic	Cross-border	Total
2013	198,859,957	4,884,210	203,744,167
2014	386,101,765	9,529,006	395,630,771
Dynamics (%)	**+ 94.16%**	**+ 95.10%**	**+94.18%**

Exhibit 50 **The traffic outside the scope of universal service, 2010 - 2014**



7.2. Structural analysis of the traffic of postal services outside the scope of universal service

Postal items concerned by the traffic outside the scope of universal service consist of letterpost items and printed matter weighing up to 2kg, postal parcels weighing up to 50 kg, postal items subject to the services with supplementary characteristics: *Cash on delivery*, *Change of destination*, *Special delivery*, *Advice of delivery*, *Express* services, direct mail items and paper money order.

7.2.1. Traffic of letterpost items and printed matter outside the scope of universal service

Table 30 Structure of the correspondence items traffic and printed matter items outside the scope of the universal service, 2014

Indicators	Correspondence items and printed matter items 2 kg, with supplementary characteristics	Items of correspondence and printed matter items 2 kg	Total
Domestic	324,906,392	3,460,364	328,366,756
Cross-border	1,768,270	467,189	2,235,459
Total	326,674,662	3,927,553	330,602,215

Tabele 31 Dynamics of the traffic of letterpost items and printed matter outside the scope of universal service during 2013 – 2014

Indicator	Intern	Internaţional	Total
2013	157.734.449	1.801.800	159.536.249
2014	328.366.756	2.235.459	330.602.215
Dinamica (%)	**+ 108.17%**	**+24.07%**	**+113.93%**

7.2.2. Traffic of postal parcels outside the scope of universal service

The total parcel traffic amounted to **29,198,406** items in 2014, accounting for 7.38% of the overall traffic outside the scope of universal service (**395,630,771** items).

The domestic parcel traffic registered **26,532,880** items, i.e. 6.87% of the total domestic traffic outside the scope of universal service (**386,101,765** items), whereas the cross-border parcel traffic counted **2,665,526** items, i.e. 27.97% of the overall cross-border traffic outside the scope of universal service (**9,529,006** items).

Table 32 Structure of the parcel traffic outside the scope of universal service, by weight categories, in 2013-2014

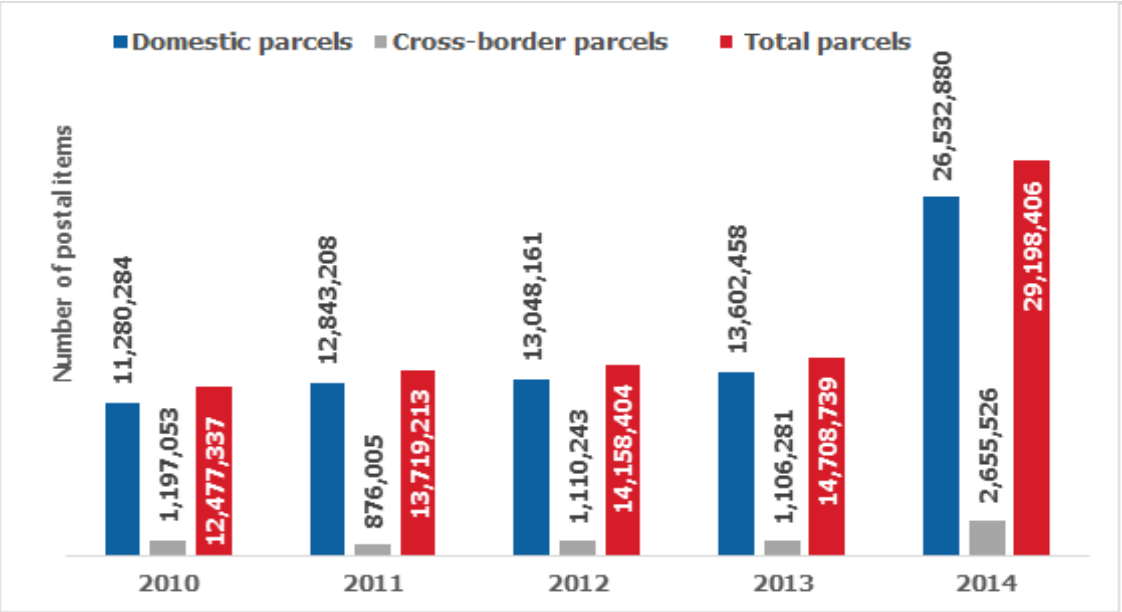
Indicators	Parcels up to 50kg	Parcels 10kg - 50kg	Parcels 10kg - 20kg	Parcels 20kg - 50kg	Total
Domestic	21,492,217	5,040,663	-	-	26,532,880

Cross-border	**incoming**	1,497,315	-	**-**	374,263	1.871.578
	outgoing	427,743	-	189,464	176,741	793.948
Total		23,417,275	5,040,663	189,464	551,004	29,198,406

Table 33 Dynamics of the parcel traffic outside the scope of universal service, 2013-2014

Indicators	Domestic	Cross-border	Total
2013	13,602,458	1,106,281	14,708,739
2014	26,532,880	2,665,526	29,198,406
Dynamics (%)	**+95.06%**	**+140.94%**	**+98.51%**

Exhibit 51 Distribution of parcel traffic outside the scope of universal service in 2010 – 2014



7.2.3. Express traffic

In 2014, the total Express traffic amounted to **8,720,319** items and accounts for 2.20% of the total traffic outside the scope of universal service (**395,630,771**).

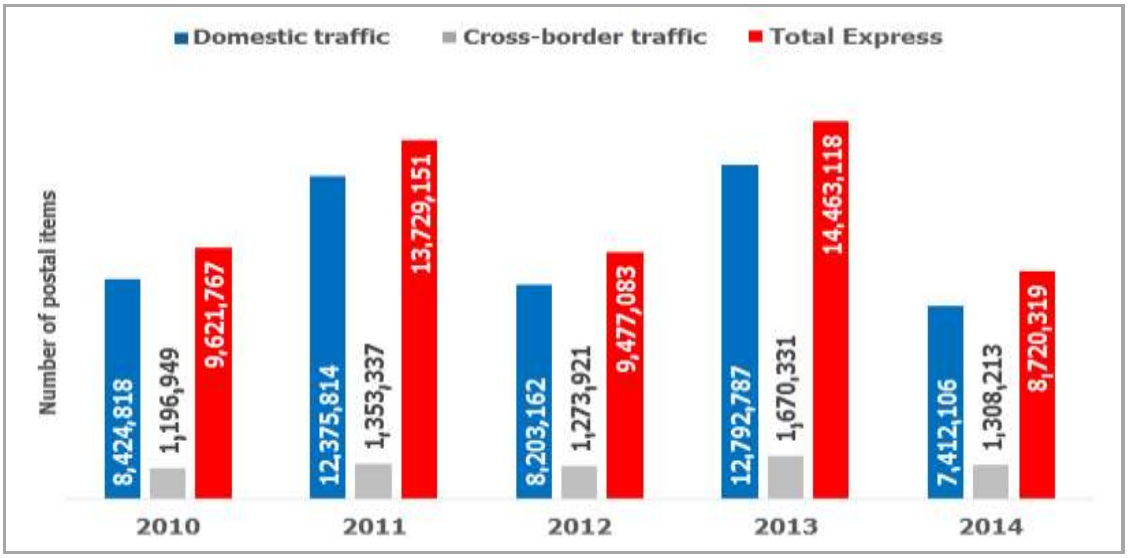
Domestic traffic counted **7,412,106** postal items, i.e. 85% of the total Express traffic and 1.92% of the total domestic traffic outside the scope of universal service (**386,101,765**).

The cross-border traffic amounted to **1,308,213** postal items, i.e. 15% of the total Express traffic and 13.73% of the total cross-border traffic outside the scope of universal service (**9,529,006**).

Table 34 Dynamics of Express traffic, 2013-2014

Indicators	Domestic	Cross-border	Total
2013	12,792,787	1,670,331	14,463,118
2014	7,412,106	1,308,213	8,720,319
Dynamics (%)	**- 42.06%**	**- 21.68%**	**- 39.71%**

Exhibit 52 **Express traffic, 2010-2014**



7.2.4. Traffic corresponding to financial postal services

In 2014, the total traffic of money orders on paper support amounted to **8,348,801** orders, of which:

- domestic traffic amounted to **7,853,458** orders, i.e. 94.07% of the total money order traffic;
- cross-border traffic amounted to **495,343** orders, i.e. only 5.93% of the total money order traffic.

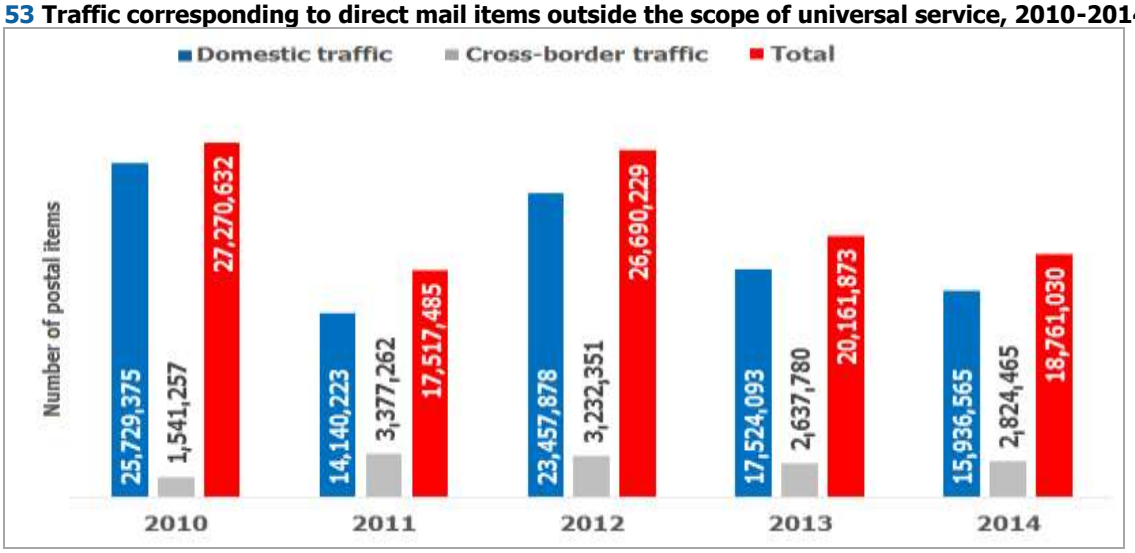
7.2.5. Traffic of direct mail items

Once with the entry into force of Government Emergency Ordinance no.13/2013 on postal services, by the provisions of Article 8 (6), indent b) thereof, direct mail services were excluded from the scope of universal service.

In 2014, the total traffic of direct mail items amounted to **18,761,030** items, of which:

- domestic traffic amounted to **15,936,565** items, i.e. 84.95% of the total direct mail items traffic;
- cross-border traffic amounted to **2,824,465** items, i.e. 15.05% of the total direct mail items traffic.

Exhibit 53 **Traffic corresponding to direct mail items outside the scope of universal service, 2010-2014**



8. Conclusions on the Romanian postal market in 2014

The following conclusions can be drawn from the analysis of the statistical data regarding the market of postal services in 2014:

- given that the share of postal providers that submitted statistical data to ANCOM is over 90%, we can say that this Report features a high degree of fidelity in representing the Romanian postal market;

- the postal market lost from its attractiveness compared to the previous years, considering the fact that the number of persons that expressed their intention to become providers of postal services in 2014 is lower than that of providers that waived their right in the same year (85 new providers entered the market, while 91 providers gave up their right);

- in the period 2011 – 2014, the postal market remained constant in terms of number of active providers, their percentage remaining at a value of over 60% of the authorized ones;

- the number of providers willing to provide postal services within the scope of universal service decreased in 2014 compared to 2013; the analysis of the reported data, respectively of the volume of postal items collected and distributed, revealed that most providers focused on processing of *parcels, items of correspondence and printed matter*, the number of suppliers active in these market segments being higher than in 2013;

- in 2014, private sector providers reduced their headcount by over 25%, while the universal service provider (CNPR) kept its employees' number at the level of 2013;

- the total volume of postal items processed in the Romanian market in 2014 continued the previous years' upward trend, registering an increase by over 10% compared tho 2013;

- the total traffic volume exceeded 600 million items in 2014 and more than 95% of it was achieved by the universal service provider and by 10 other large volume private providers, which processed mainly domestic postal items (the share of domestic traffic within the total traffic is over 95%);

- the total traffic consists of letter post items (80%), parcels (about 10%), direct mail (3%), money orders (1.35%) and Express items (1.39%);

- 15 providers, including universal service provider (CNPR), obtained over 90% of the revenues in the postal market in 2014, handling over 97% of all postal items processed in the reference year;

- while the total volume of postal items processed by the universal service provider (CNPR) in the past five years witnessed a variation by insignificant fluctuations, the traffic of other postal providers in the market saw a steadily growing trend, therefore the latter's traffic increased by over 40% in 2014 compared to 2013;

- while the volume of letter post items remained at about the same level as in 2013, total parcel traffic recorded a spectacular growth by over 130% private providers being the ones to process almost 90% of it;

- total Express traffic registered a substantial , registered a substantial decline by nearly 40% compared to 2013, being almost entirely processed by ten suppliers only;

- the traffic within the scope of universal service witnessed a downward trend starting 2011, therefore 2014 saw the lowest value in the past five years (decrease by more than 35% compared to 2013);

- the traffic within the scope of universal service processed by private providers in the past five years registered a continuous growth, culminating in 2014 with a growth by over 50% compared to 2013, while the traffic processed by the universal service provider in this market segment decreased by over 65%;

- in 2014, the total postal traffic corresponding to the postal services outside the scope of universal service, representing more than 60% of the total postal traffic continued the past five years' upward trend, with the highest upsurge recorded in 2014 – by over 90% compared to 2013 - , this market segment being almost entirely (95%) operated by the top ten large volume providers.