



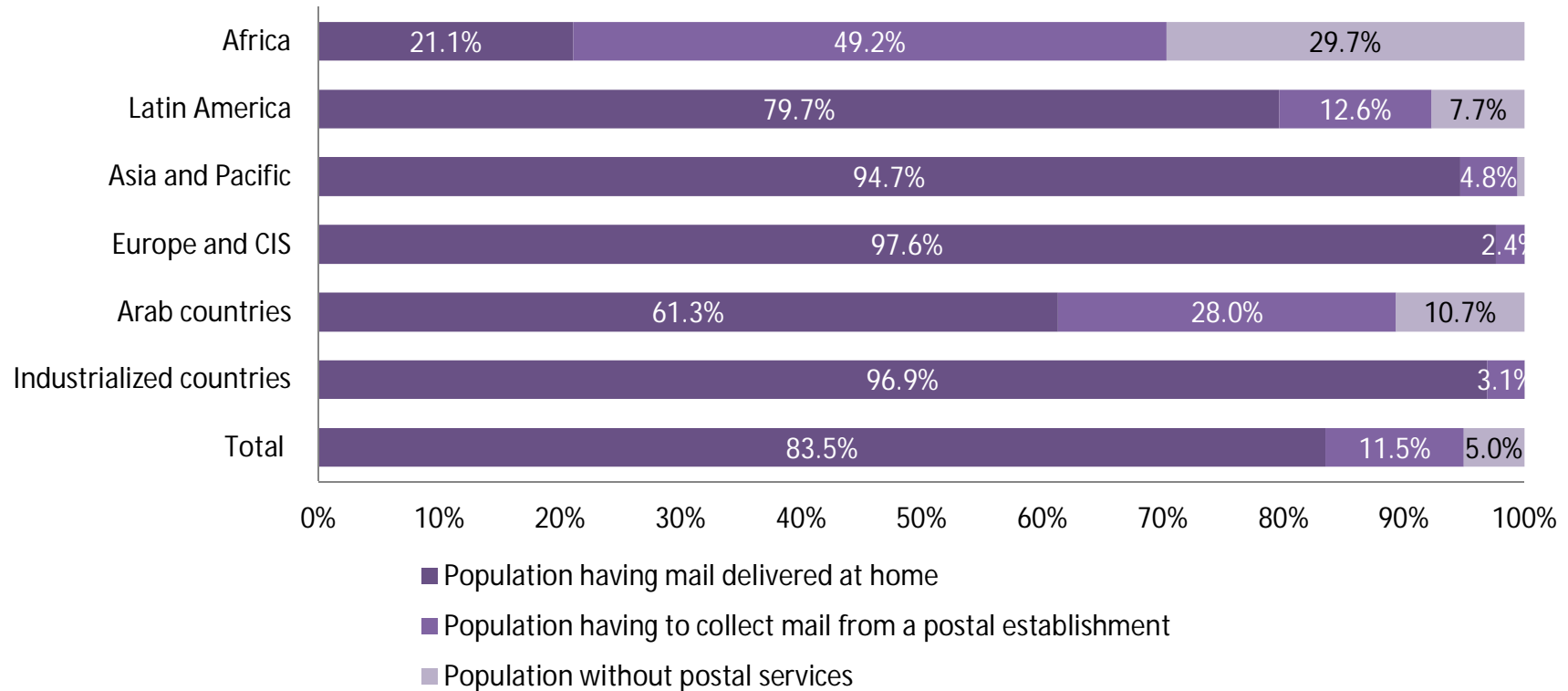
Development of postal services in 2011

A few key figures...



Access to postal services

(estimate by region, 2011)

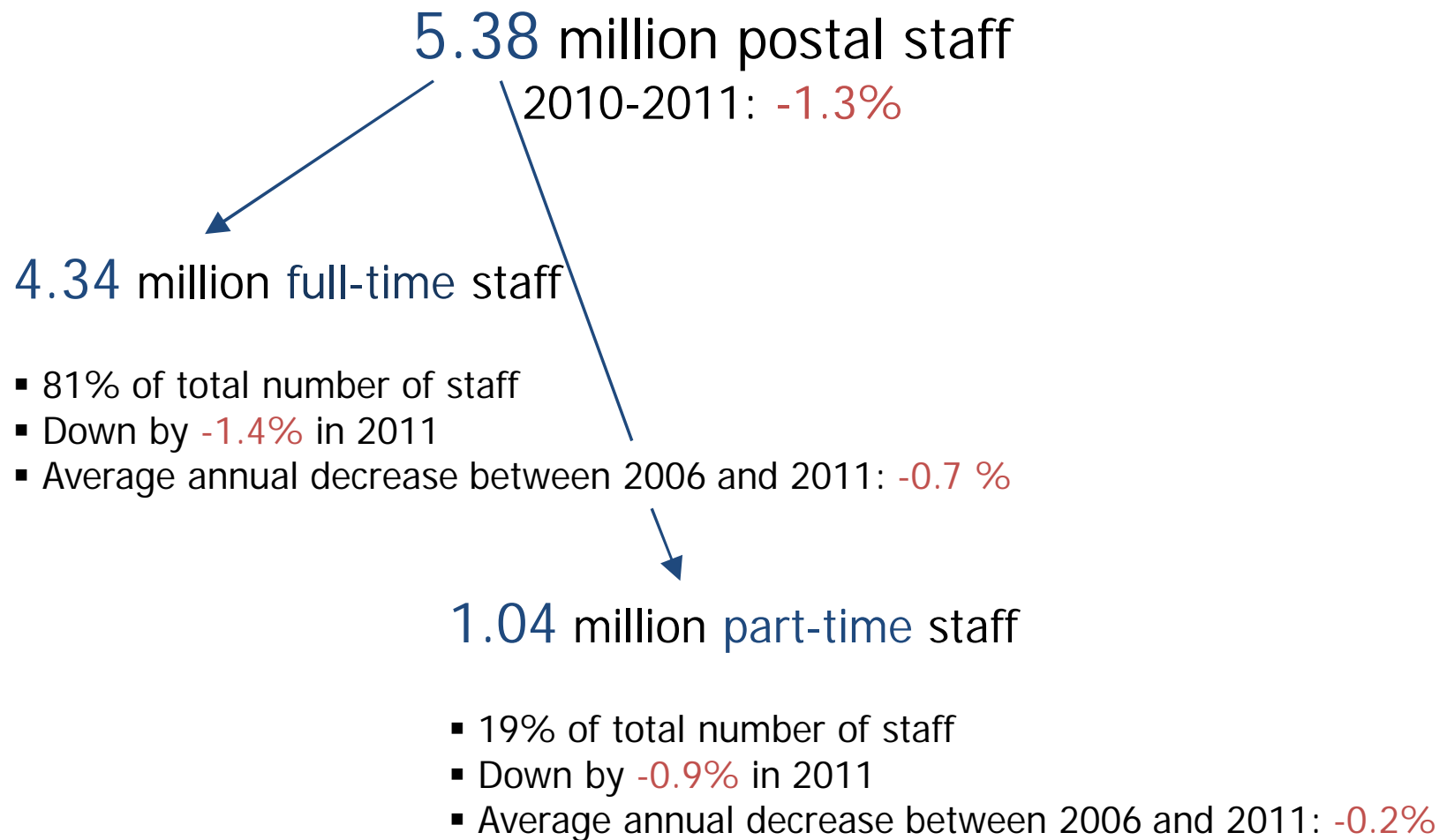


- 83.5% of world population benefits from home mail deliveries
- 5% lacks postal services which equals 350 million people
- Mail deliveries to post office boxes are mainly made in Africa



Postal staff

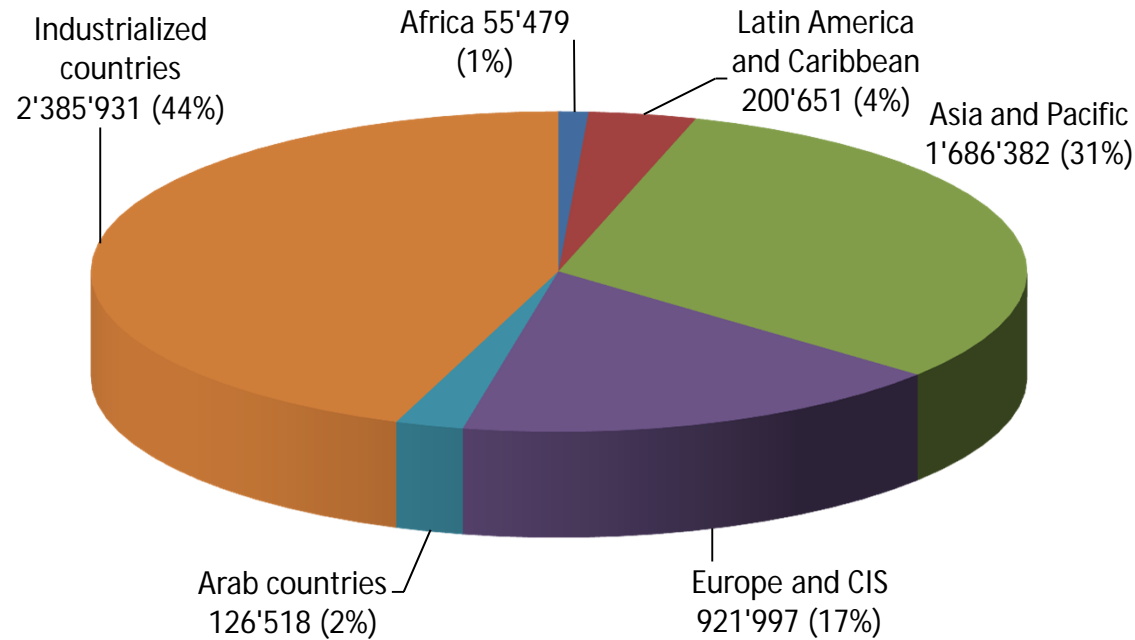
(world estimate, 2011)





Postal staff

(estimate by region, 2011)

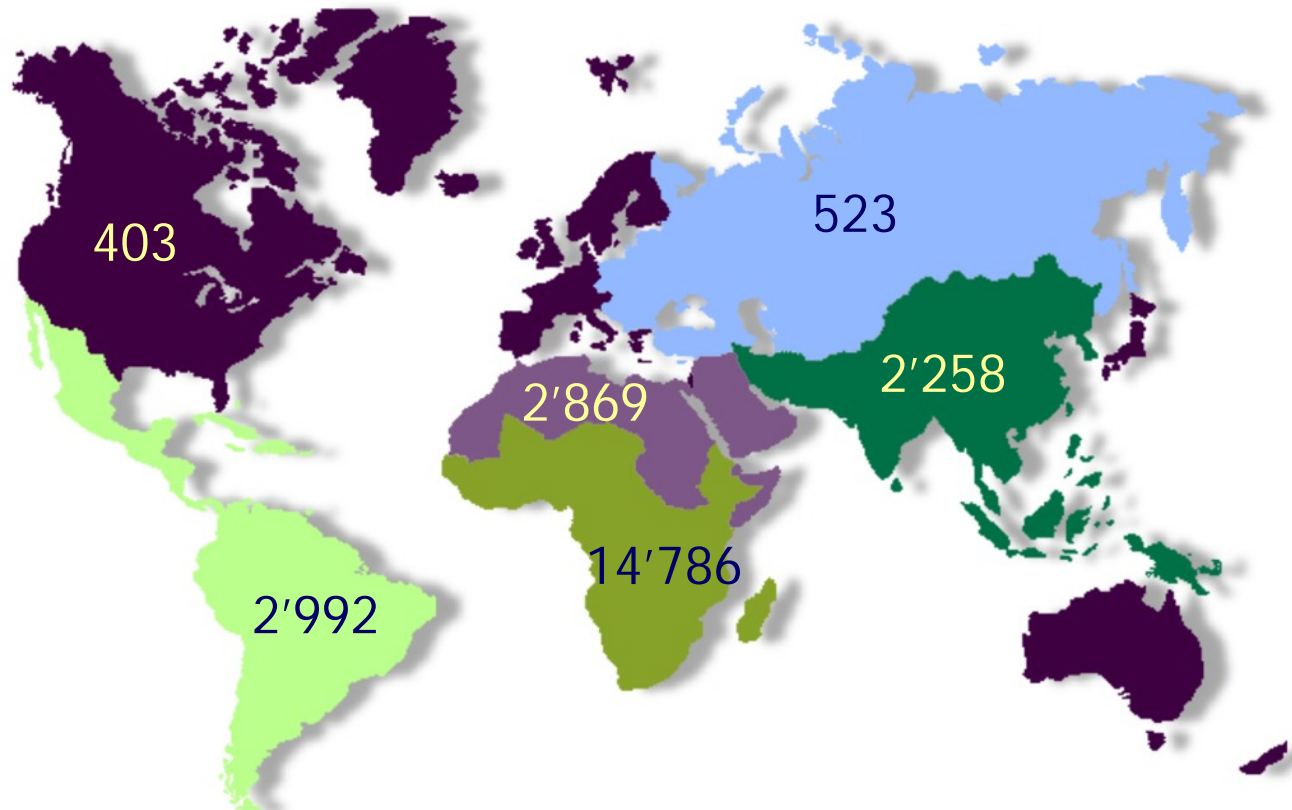


Globally, each staff member serves an average of 1'308 people.

	Variation 2010-2011
Africa	-3.2%
Latin America and Caribbean	3.7%
Asia and Pacific	0.7%
Europe and CIS	-1.5%
Arab countries	0.3%
Industrialized countries	-3.1%



Number of people served by each staff member, 2011



World average 2011: 1'308



Post offices

(world estimates, 2011)

663'000 post offices

2010-2011: +1.5%

440'000 offices staffed by postal administration officials

- 66% of total number of offices
- Increase by 2.7% in 2011

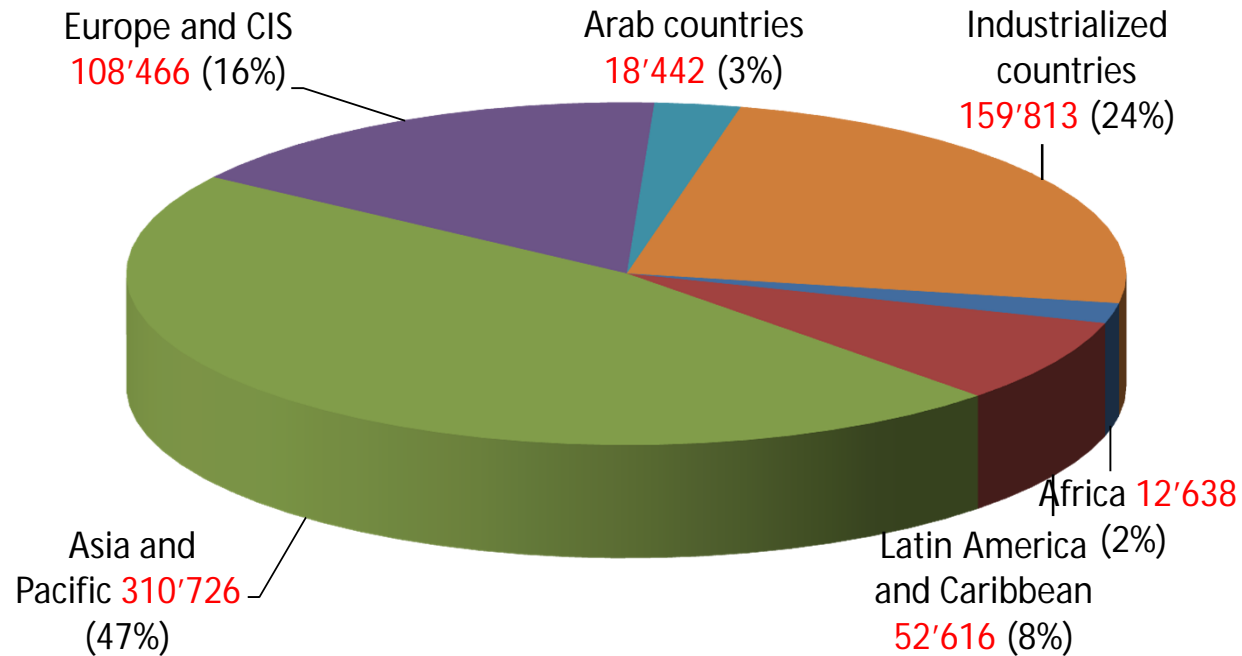
223'000 offices staffed by persons from outside the postal administration

- 34% of total number of offices
- Down by 0.7% in 2011



Post offices

(estimate by region, 2011)

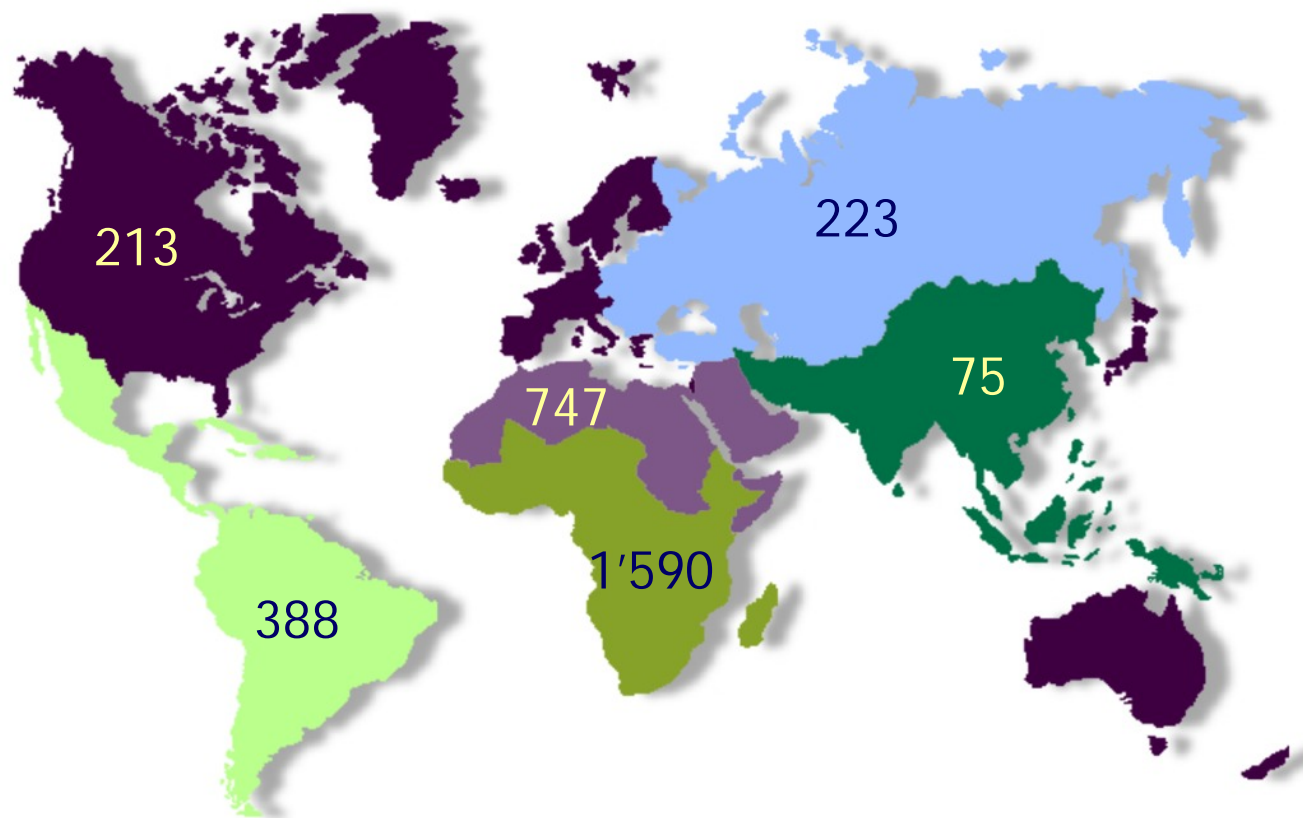


Globally, each permanent post office covers an area of 205 km² and serves an average population of 10'614.

	Variation 2010-2011
Africa	1.6%
Latin America and Caribbean	-0.4%
Asia and Pacific	6.1%
Europe and CIS	-2.0%
Arab countries	17.3%
Industrialized countries	-5.0%



Average area covered by a permanent office (km²), 2011



World average in 2011: 205



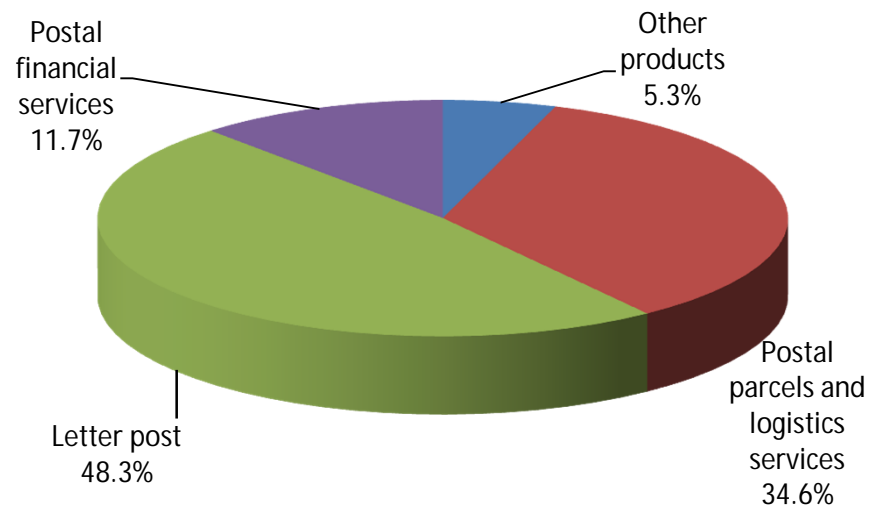
Postal revenue

(world estimate, 2011)

Global revenue: **197** billion SDR

- Decreased by 3.1% between 2010 and 2011
- Growth in 42% countries covered by questionnaire (compared to 58% in 2010)

Breakdown of revenue by product (weighted by the total revenues of the designated operators)

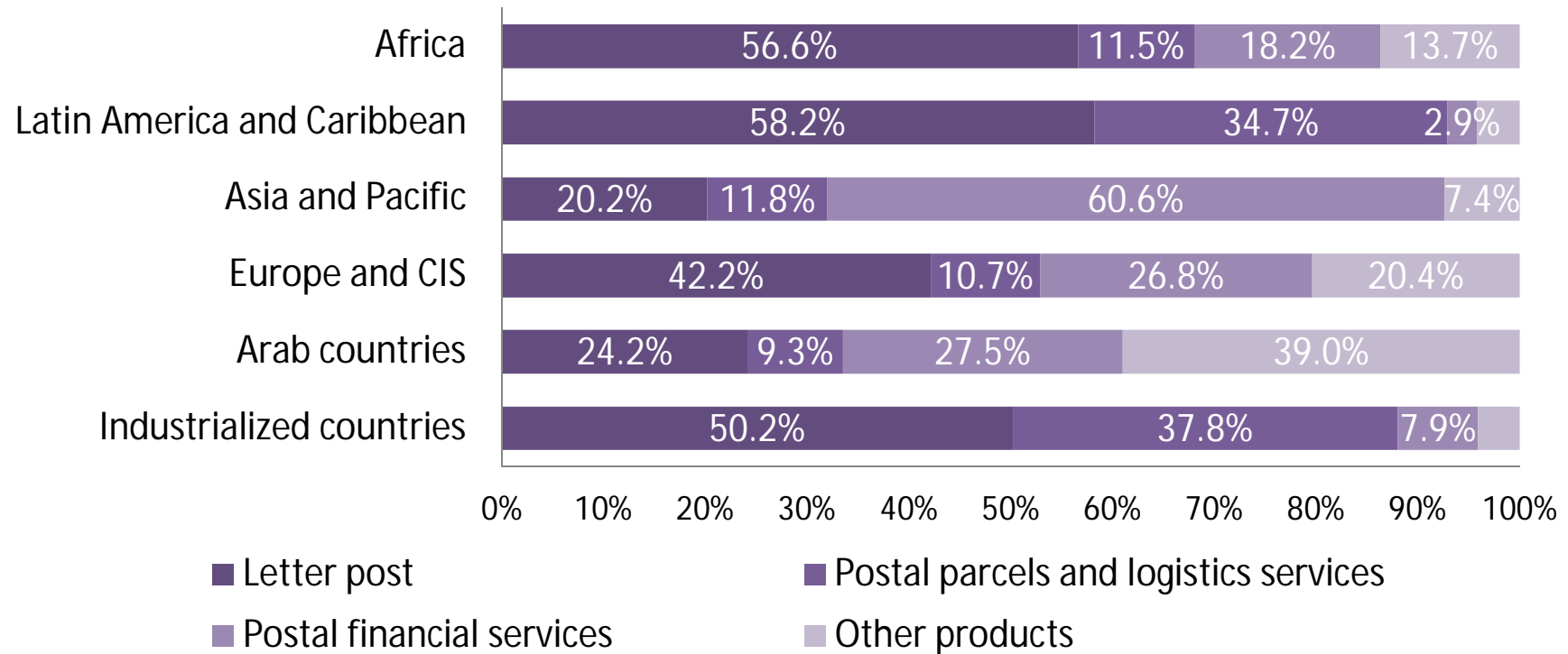


- The letter post generates a declining share in revenue
- The share of postal parcels and logistics services rises compared to 2010.



Postal revenue by product

(estimate by region, 2011, weighted by total revenues of designated operators in every region)



- In Asia and Pacific postal financial services generate the largest part of total revenues.



Letter post

(world estimates, 2011)

Total traffic: **368.4** billion items

2010-2011: **-3.7%**

Domestic service

363.7 billion items (98.7% of total traffic)

2010-2011: **-3.7%**

International service

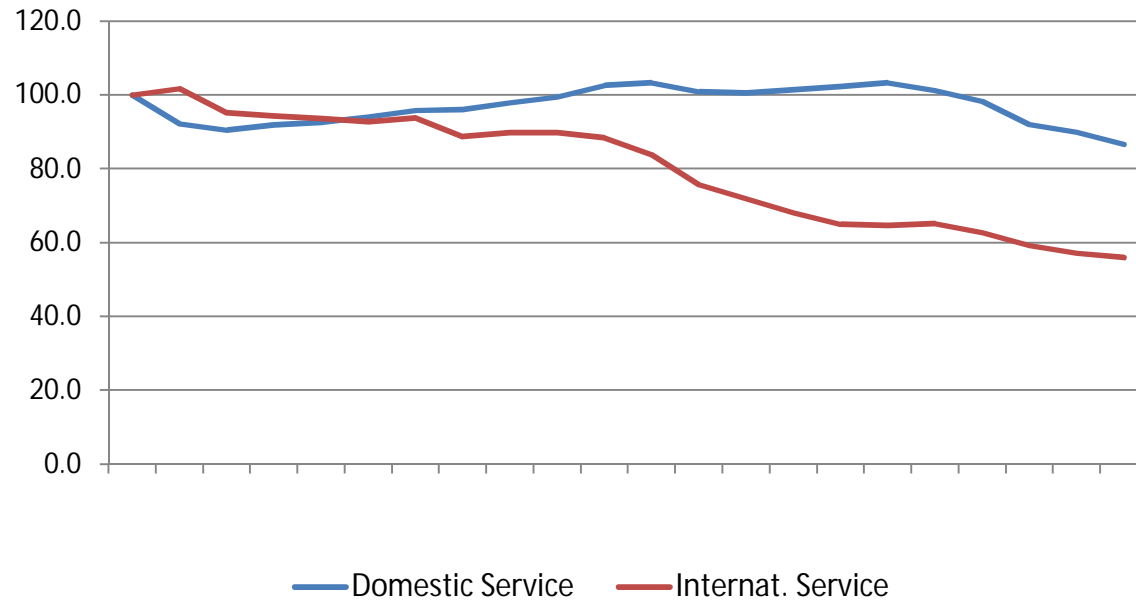
4.7 billion items (1.3% of total traffic)

2010-2011: **-2.2%**



Letter post

(world estimates, 2011)



Base, 1990=100

Drop in domestic volume accelerated

Drop in international service slowed down, but level is at almost half of 1990.

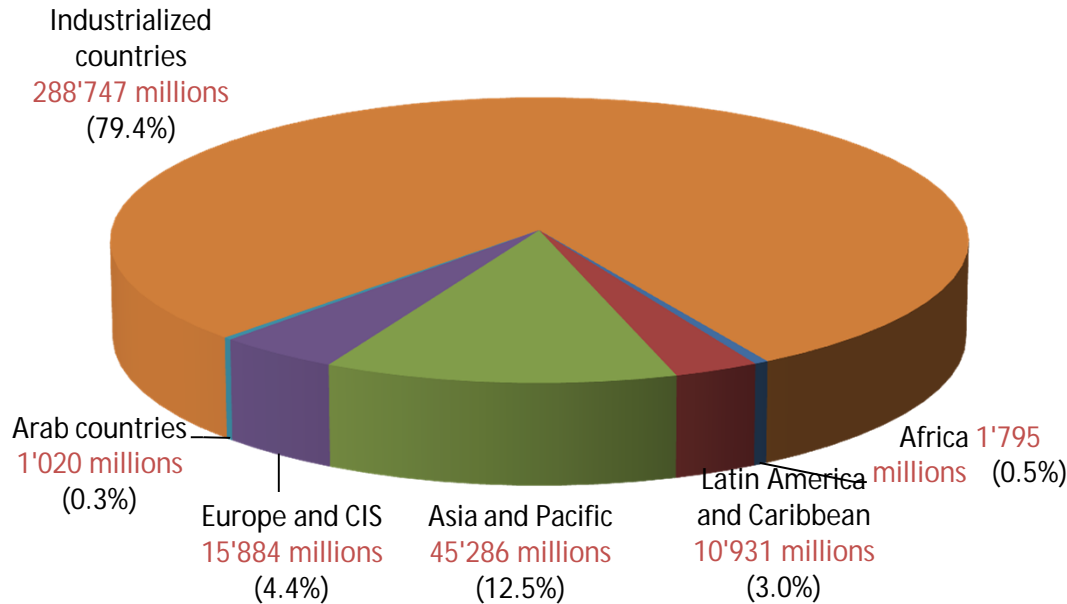
Average annual variation

	1990-2000	2000-2011	2010-2011
Domestic service	0.3%	-1.5%	-3.7%
International service	-1.3%	-4.1%	-2.2%



Letter post, domestic service

(estimates by region, 2011)



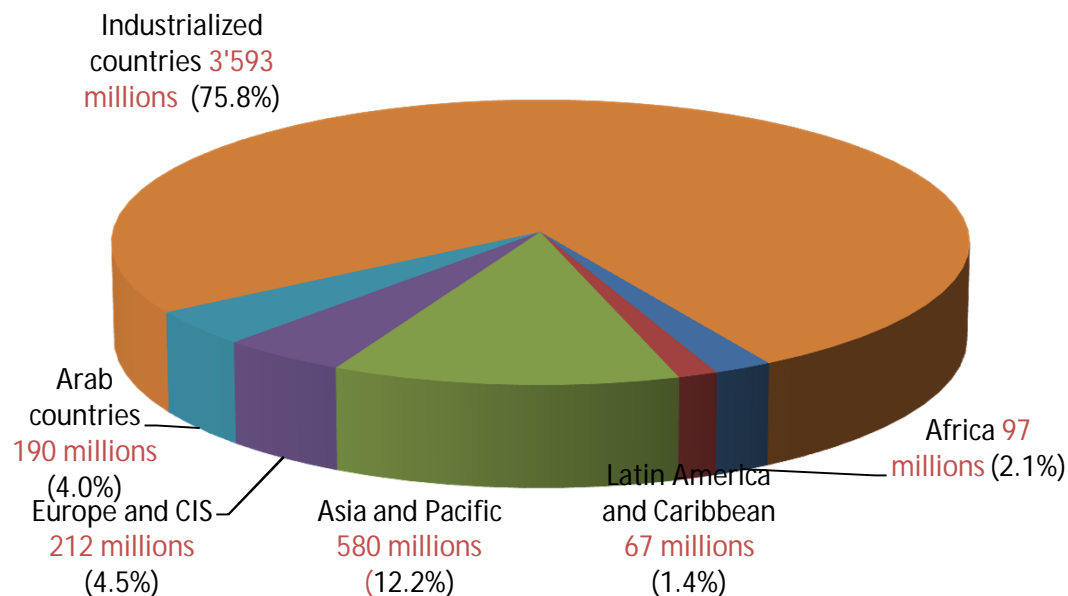
Growth in 32.7% of the countries in the world (compared to 37.4% in 2010)

	Variation 2010-2011	% of countries experiencing growth
Africa	-3.0%	27.9%
Latin America and Caribbean	1.0%	35.7%
Asia and Pacific	1.1%	31.4%
Europe and CIS	-5.1%	51.6%
Arab countries	-7.1%	19.0%
Industrialized countries	-4.5%	28.2%



Letter post, international service

(estimates by region, 2011)

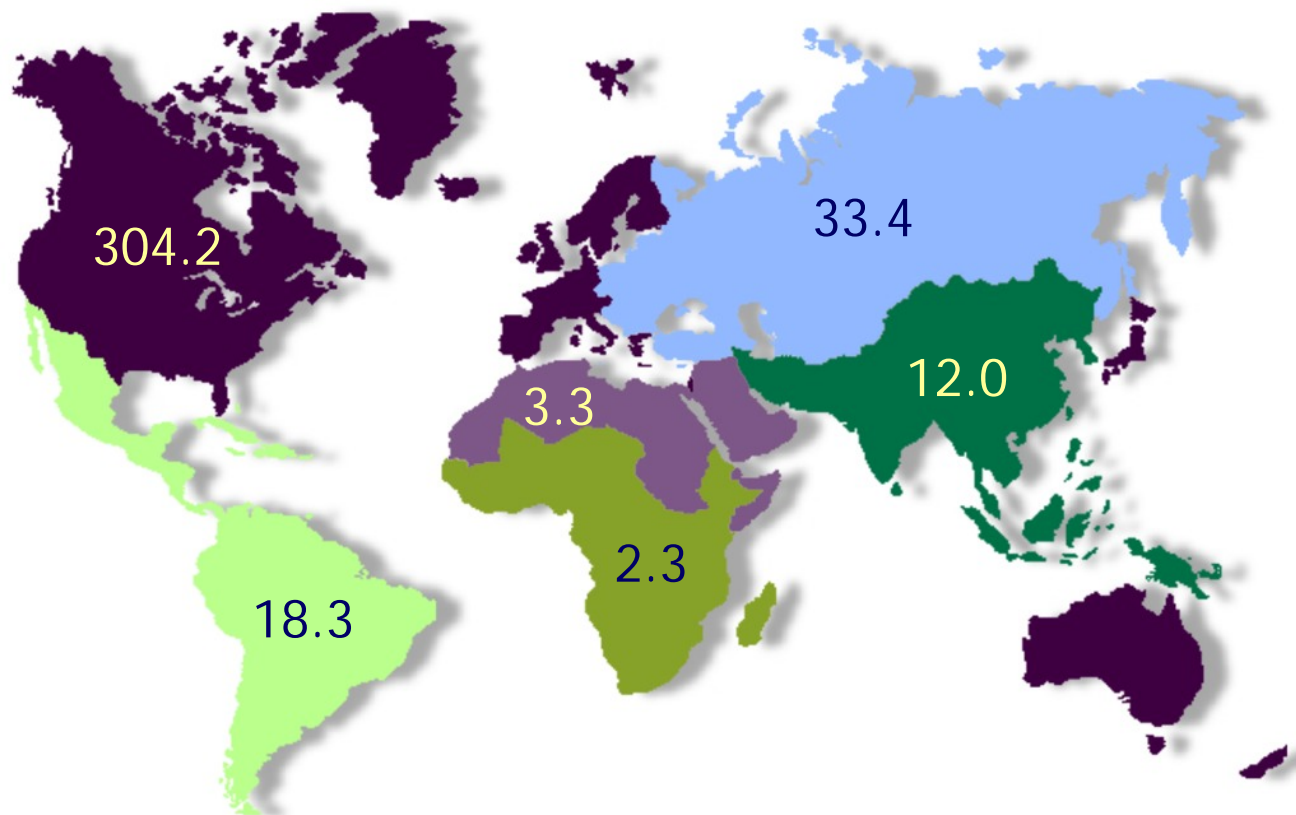


Growth in 27.6% of the countries in the world (22.9% in 2010)

	Variation 2010-2011	% of countries experiencing growth
Africa	-6.8%	32.6%
Latin America and Caribbean	-9.6%	21.4%
Asia and Pacific	1.1%	31.4%
Europe and CIS	-1.8%	29.0%
Arab countries	-4.8%	33.3%
Industrialized countries	-2.3%	21.4%



Number of letter-post items posted per capita, 2011

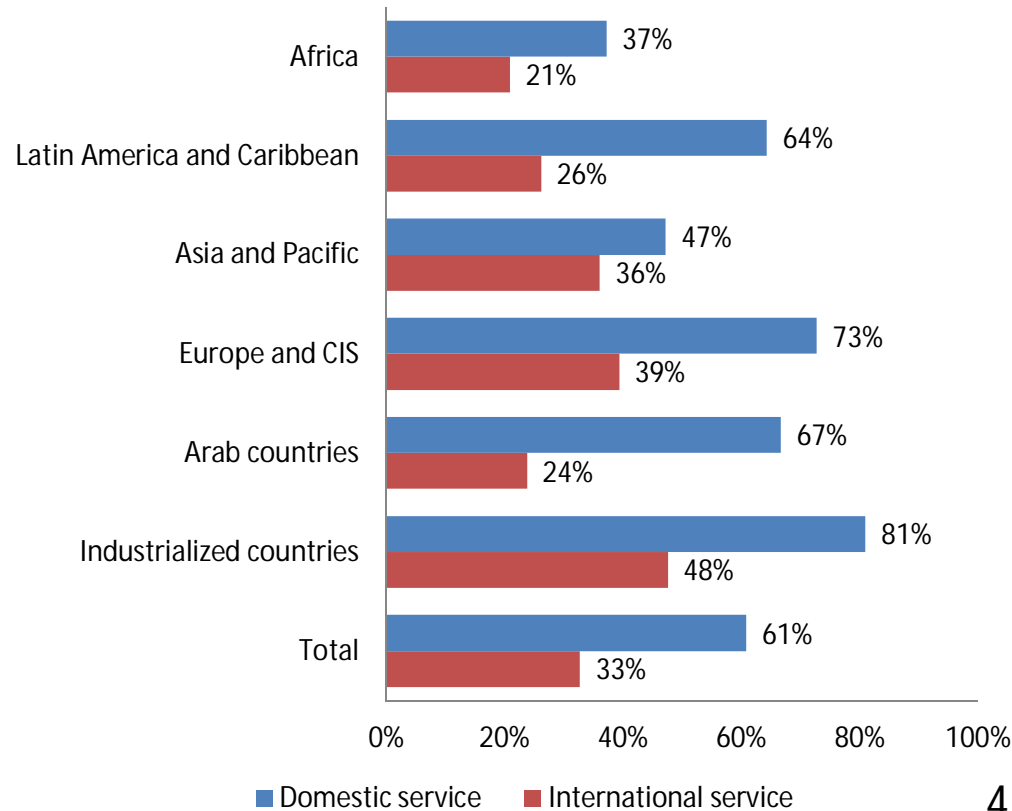


World average in 2011: 52.3



Advertising items

(regional estimates, 2011)



61% of member countries offer an advertising mail service in their domestic market and 33% in the international market.

On average around the world, advertising items present

42 % of letter-post items in the domestic service

12% of letter-post items in the international service



Ordinary parcels

(world estimates, 2011)

Total traffic: **6'402** million items

2010-2011: +2.1 %

Domestic service

6'344 million items (99.1% of total traffic)

2010-2011: +2.1 %

International service

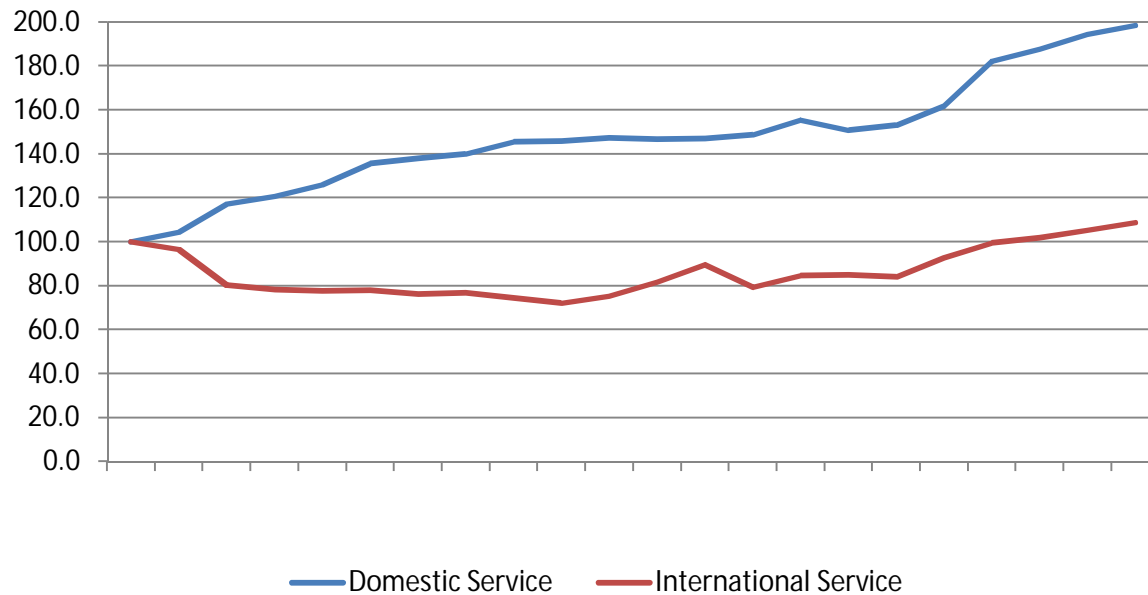
58 million items (0.9% of total traffic)

2010-2011: +3.5%



Ordinary parcels

(world estimates, 2011)



Domestic volume of ordinary parcels has almost doubled since 1990.

International service increased strongly in 2011.

Base, 1990=100

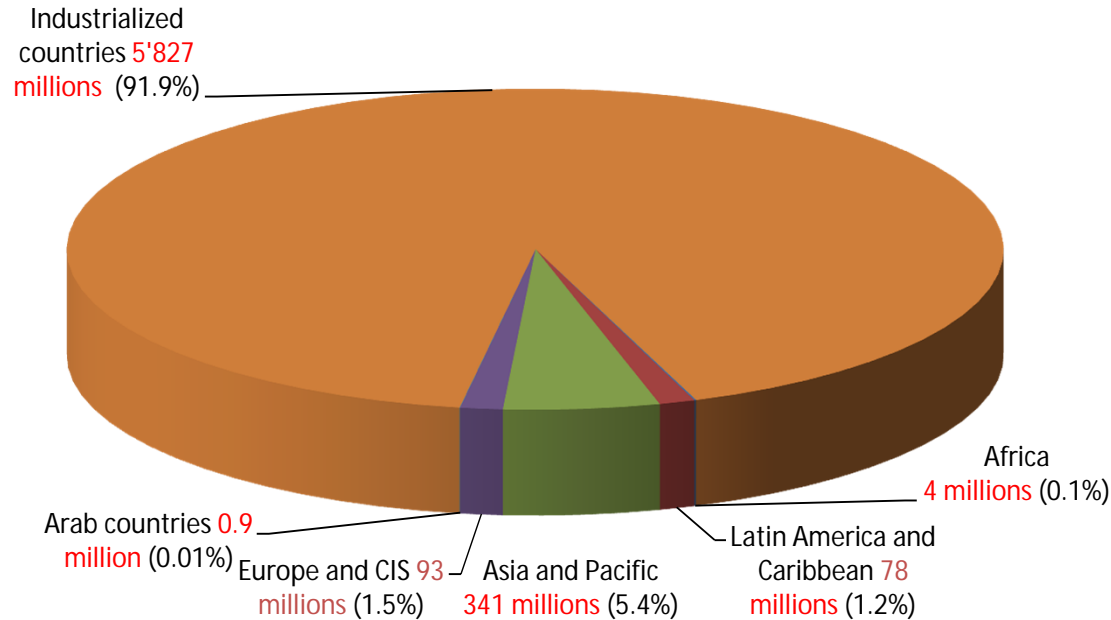
Average annual variation

	1990-2000	2000-2011	2010-2011
Domestic service	3.9 %	2.8 %	2.1 %
International service	-2.8 %	3.4 %	3.5 %



Postal parcels, domestic service

(estimates by region, 2011)



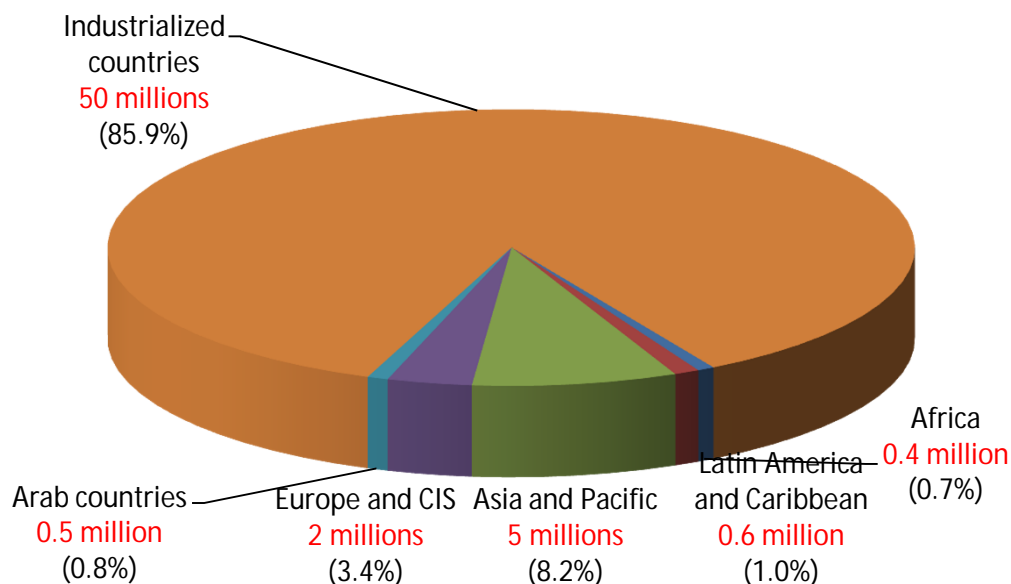
Growth in 45.3 % of the countries in the world (50.3% in 2010)

	Variation 2010-2011	% of countries experiencing growth
Africa	-7.5%	58.6%
Latin America and Caribbean	21.7%	28.0%
Asia and Pacific	3.8%	55.6%
Europe and CIS	0.3%	37.9%
Arab countries	2.1%	46.7%
Industrialized countries	1.8%	44.4%



Postal parcels, international service

(estimates by region, 2011)

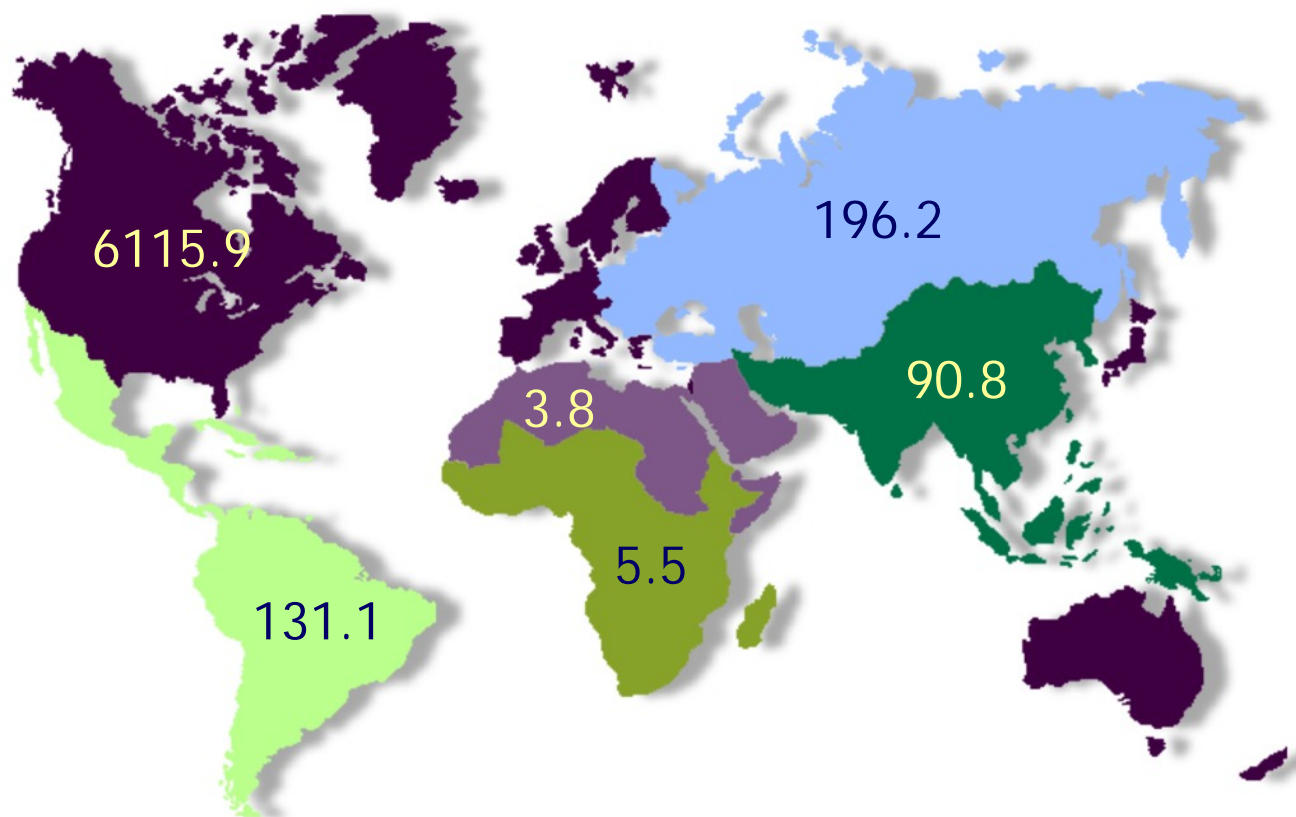


Growth in 51.7% of the countries in the world (60.3% in 2010)

	Variation 2010-2011	% of countries experiencing growth
Africa	3.9%	35.7%
Latin America and Caribbean	0.5%	61.0%
Asia and Pacific	3.7%	45.7%
Europe and CIS	10.0%	72.4%
Arab countries	4.2%	28.6%
Industrialized countries	3.2%	64.1%



Number of postal parcel posted per 1'000 inhabitants, 2011



World average in 2011: 909



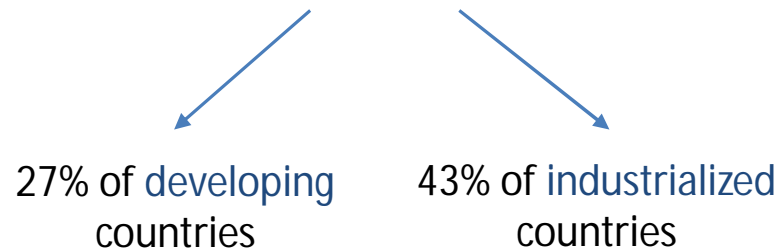
New products

(world estimates, 2011)

Hybrid mail

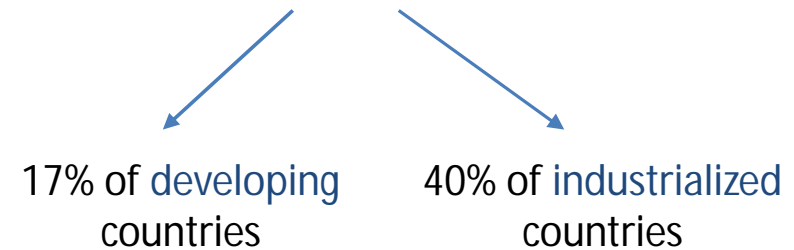
Domestic service

Service offered by 30% of countries around the world



International service

Service offered by 22% of countries around the world





New products

(world estimates, 2011)

Logistics services

Service offered by 39% of countries around the world (compared to 28% in 2006)



38% of
developing
countries

46% of
industrialized
countries

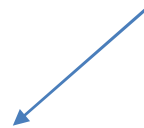


New products

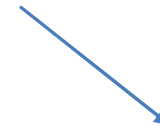
(world estimates, 2011)

Online Internet services

Service offered by 80 % of countries around the world (compared to 60% in 2006)



77% of **developing** countries



96% of **industrialized** countries

Principal online services offered:

- Track and trace
- Information on tariffs
- Postcode lookup
- Sale of philatelic products
- E-mail services