

Postal companies: recent past, future developments and competition policy

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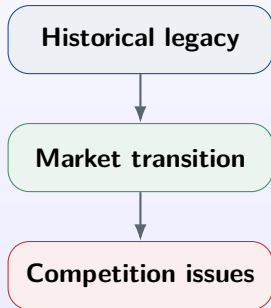
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Key transition: from protected letter-mail monopolies to multi-service logistics platforms under growing competitive pressure.

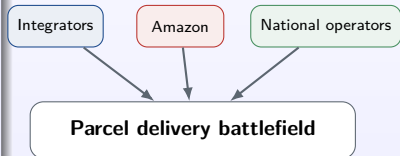
Main takeaways

- This presentation proposes an analysis of the postal sector from a historical perspective and develops scenarios to discuss the future of the sector.
- It is valuable because it brings together evidence from different countries and institutional models.
- It also highlights a key risk: the sector may become more concentrated, with direct implications for competition policy.



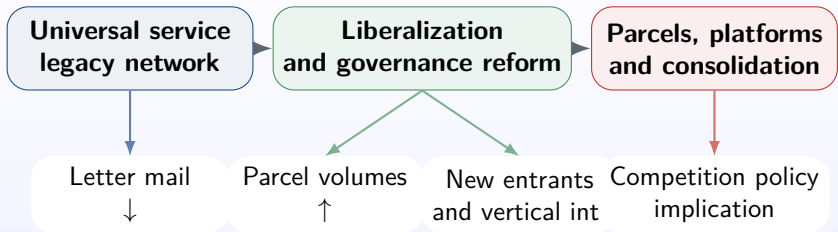
Observed structural changes

- Liberalization has occurred, but ownership still varies widely: state-owned (France, Spain), partially privatized, or largely privatized (Germany, Netherlands).
- The major structural shift is clear: letter mail declines, parcel delivery grows, and operators diversify into new activities.
- Parcel delivery competition now comes from integrators, Amazon, and national postal operators.



Questions to strengthen the scenario approach

- How are assumptions selected? What probability or degree of plausibility is attached to each scenario?
- How should one incorporate demand trends, technological change (for example drones or automation), and rivals' reactions?
- What role does ownership play in the evolution of competition and market organization?
- What role for the regulator / competition authorities?



Concluding thoughts

The central policy issue is no longer only how to regulate a declining mail monopoly, but how to govern a contested logistics ecosystem in which scale, data, infrastructure and vertical integration matter increasingly.