



Annual report 2024



EDITORIAL

ANNE SEYDOUX-CHRISTE
President

Profound changes

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2024 was another year of profound changes for the Swiss postal market. The decline of letter volumes continued, while the parcel market grew overall, driven mainly by foreign online retail. Despite these changes, however, the system is still strong thanks to the innovative power and diverse services offered by Swiss Post and numerous private providers. In terms of the universal service, the high standards set in comparison to other countries were exceeded yet again.



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Summary

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In 2024, the total revenue in the postal market amounted to CHF 4.3 billion, with a consignment volume of 2.6 billion items. Total revenue in the letter market stood at CHF 1.5 billion for a volume of 1.6 billion consignments, a rise of 2.8% year-on-year. At the end of 2024, Swiss Post's network consisted of a total of 1,995 staffed access points. In the reporting year, Swiss Post met all the targets set by postal legislation.



About PostCom

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PostCom is an independent authority that oversees the Swiss postal market and monitors the quality of the universal postal service. It fulfils the tasks assigned to it in accordance with postal legislation provisions. During administrative proceedings, PostCom considers each case individually in accordance with its statutory mandate and its own established practice. PostCom also keeps the public informed about its activities and proposes measures to the Federal Council that will support PostCom in fulfilling its tasks.



Annual report 2024

Editorial



Anne Seydoux-Christe, Resident

For many of us, the trip to our mail box is a daily ritual. It is often an unremarkable event – and yet there is much more to it than meets the eye. We rely on the fact that our bills, voting papers, and perhaps even a handwritten letter or eagerly awaited parcel, will be delivered intact, undamaged and on time.

Dear Reader

2024 was another year of profound changes for the Swiss postal market. The decline of letter volumes continued, while the parcel market grew overall, driven mainly by foreign online retail. Despite these changes, however, the system is still strong thanks to the innovative power and diverse services offered by Swiss Post and numerous private providers.

In terms of the universal service, the high standards set in comparison to other countries were exceeded yet again. This is not something that should be taken for granted – it is a result of the hard work of all employees. Mail carriers are more than just delivery people, they are familiar faces. In rural areas in particular, they often also take on a social role, acting as discreet onlookers who notice when something is wrong.

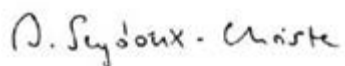
Traditional postal services must continue to evolve without losing sight of their roots. But how, and at what cost? PostCom is committed to striking a balance between economic efficiency, technological progress and the need for nationwide, high-quality postal services. We explore these issues in our analysis of the universal service and its financing, in our review of the evolution of the postal markets, and in our outlook on the future.

Technological and social change is transforming the way we live and raising our expectations. Everything has to be fast and run smoothly. We want real-time shipment tracking, flexible delivery solutions, and other additional services that were unthinkable in the past. The parcel market is particularly competitive. As such, we exercise our supervisory role robustly, working to ensure fair market and working conditions.

In a time when so much is digital, the physical, tangible nature of the postal service still has a particular importance. Unmet expectations trigger criticism and disputes, which postal services providers attempt to resolve through their customer service departments or, ultimately, through the independent conciliation authority Ombud-PostCom. In mid-2024, Dr Marianne Sonder, who had headed this service since it was created in 2013, handed over her duties to her successor, lawyer Claudia Scheiner. PostCom would like to thank Dr Sonder for her dedication and valuable contributions. We are confident that this important role remains in capable hands with Ms Scheiner, as demonstrated by her first report.

As ever, our task is to support change in the postal market with an eye to the future – acting independently, objectively, competently, and in the interests of the economy and the public. Mail boxes should continue to be more than just a receptacle. They should be a symbol of a functioning infrastructure and of reliability in everyday life – as well as a small window to the world, offering a daily piece of familiarity and sometimes even a smile.

I hope you find our annual report an informative read.



Anne Seydoux-Christe
President
Bern, May 2025



Key information in brief

In 2024, the Swiss postal market enjoyed one of the strongest revenue growth rates of recent years. The main drivers of this development were price adjustments and the sharp increase in import parcel volumes. At the same time, the structural decline in letter and newspaper volumes is continuing apace.

The total revenue generated by the postal market in 2024 amounted to CHF 4.3 billion for a consignment volume of 2.6 billion items. Following two financial years of falling income, the sector has returned to a trajectory of revenue growth, although it is still short of the peak seen during the pandemic in 2021.

In May 2025, 207 companies were registered with PostCom as postal services providers, two fewer than in the previous year. This slight decrease is primarily due to a Federal Administrative Court judgment that excluded food delivery from the scope of postal legislation.

PostCom is responsible for ensuring that postal services providers comply with industry-standard working conditions. Since January 2019, 84 companies have been comprehensively audited, with supervisory proceedings initiated in 27 cases. The most frequent complaints in recent years have related to compliance with contractually agreed weekly working hours (maximum of 44 hours), minimum hourly wage (CHF 19) and other labour law requirements.

In the reporting year, Swiss Post met all the targets set by postal legislation. The high quality of the universal service was reflected in the punctuality figures for letter and parcel delivery. Swiss Post also complied with other quality requirements, such as the accessibility of its services and the network density criterion.

Since the revised postal legislation entered into force in 2012, post offices and postal agencies have been designated as staffed access points. At the end of 2024, there were 765 self-operated post offices and 1,230 postal agencies, which means that Swiss Post's network had a total of 1,995 staffed access points. As in the previous year, the number of post offices and postal agencies declined.

During the reporting period, Swiss Post did not notify any communes of post office or postal agency relocations. The fall in the number of decision notifications and submissions to PostCom in recent years is due to Swiss Post's strategy of stabilising the post office network at around 800 self-operated branches in the period from 2021 to 2024.

Swiss Post plans to maintain its current strategy ('Swiss Post of tomorrow') and, alongside its core postal and financial services, continue investing in digital solutions. Despite the decline in volumes in the traditional letter segment, Logistics Services still makes a significant contribution to the Group's result. The self-financing of the universal service is guaranteed in the medium term.



Key figures

Revenue development

in CHF billion	2023	2024	Variation
Postal market overall	4.122	4.269	3.6%
Postal consignments within the universal service: Swiss Post and private providers (parcels up to 20kg, letters up to 1kg, newspapers and magazines with daily delivery, national and cross-border)	3.239	3.336	3.0%
Universal service provided by Swiss Post (under Art. 29 Postal Services Ordinance)	2.666	2.699	1.2%

Volume development

in billions of consignments	2023	2024	Variation
Postal market overall (parcels up to 30kg, express and courier services, letters up to 2kg, newspapers and magazines with daily and morning delivery, national and cross-border)	2.733	2.607	-4.6%
Postal consignments within the universal service: Swiss Post and private providers (parcels up to 20kg, letters up to 1kg, newspapers and magazines with daily delivery, national and cross-border)	2.539	2.410	-5.1%
Universal service provided by Swiss Post (parcels up to 20kg, letters up to 1kg, newspapers and magazines with daily delivery, national and cross-border)	2.119	1.992	-6.0%



Summary

Price increases and more imported parcels lead to revenue growth in the postal market

In 2024, the Swiss postal market enjoyed one of the strongest revenue growth rates of recent years. The main drivers of this development were price adjustments and the sharp increase in import parcel volumes. At the same time, the structural decline in letter and newspaper volumes is continuing apace.

In the reporting year, Swiss Post met all the targets set by postal legislation. The self-financing of the universal service is guaranteed in the medium term.

In 2024, the total revenue in the postal market amounted to CHF 4.3 billion, with a consignment volume of 2.6 billion items (see also the key figures on page 2). After two financial years of declining revenue, the sector has therefore returned to a growth trajectory, although it is still short of the peak seen during the pandemic in 2021. The rise during the reporting year is mainly due to price increases in all product segments. While courier, express and parcel consignments (CEP consignments) recorded moderate volume increases, the number of letters, newspapers and magazines sent fell sharply, as expected.

Revenue in the postal sector has risen by an average of 0.8% a year since 2020, buoyed by strong demand in the parcel segment. During the same period, volumes fell by an average of 4% a year. The letter business has been in steady decline for years, which means that this segment's share of total Swiss postal market revenue has dropped sharply.

In 2024, total revenue in the letter market stood at CHF 1.5 billion for a volume of 1.6 billion consignments, a rise of 2.8% year-on-year. This growth is mainly due to price increases, as the number of letters transported fell by a total of 6.4% during the same period. The situation on the letter market is following roughly the same trend as previous years, although the downward trend in the domestic letters segment has accelerated slightly (–6.5% in 2024 compared to a five-year average of –4.5%).

While revenue in the CEP market rose by 4.6%, the consignment volume grew by 1.8%, which was significantly higher than the growth rate recorded in 2023. Similar to e-commerce, cross-border postal traffic rose disproportionately: the revenue and volume for CEP import consignments increased by 23% and 15% respectively.

Slight decline in the number of companies subject to reporting requirements

In May 2025, 207 companies were registered with PostCom as postal services providers, two fewer than in the previous year. This slight decrease is primarily due to a Federal Administrative Court judgment that excluded food delivery from the scope of postal legislation.

Universal service: Swiss Post still exceeding targets

Swiss Post achieved a punctuality rate of 97.4% for letters delivered one day after posting, meeting the transit time target of 97%. Compared to the previous year, Swiss Post managed a slight improvement in this result. Swiss Post significantly exceeded regulatory requirements for letters delivered three days after posting, achieving punctuality of 99.1%.

Under the Postal Services Ordinance (PostSO), 95% of all domestic parcels within the universal service must be delivered either on the following working day or within three working days of posting, depending on the type of franking used. At 96.2%, Swiss Post exceeded this target for parcels delivered one day after posting, a significantly better result than in 2023. For parcels delivered three days after posting, Swiss Post achieved a punctuality rate of 99.6%, clearly above the target.

If no morning delivery is offered within a specific region, Swiss Post must deliver subscribed newspapers to all households by 12.30pm. Its nationwide average punctuality rate for this service is 97.8%, including in rural and peripheral areas. This result was once again significantly higher than the statutory target of 95%.

In relation to accessibility, Swiss Post exceeded the target of 90% (including home service) in all cantons, with a national annual score of 96.73% including home service. This is slightly higher than the previous year's figure of 96.68%. As in 2023, the highest accessibility scores were recorded in the cantons of Basel-Stadt (99.79%), Geneva (99.41%) and Zurich (98.80%). The lowest result was recorded in the canton of Fribourg (93.23%), followed by Bern (93.37%) and Uri (93.98%).

Postal network: Still around 2,000 access points

At the end of 2024, Swiss Post's network consisted of 765 self-operated post offices and 1,230 postal agencies, which equates to a total of 1,995 staffed access points. As in the previous year, the number of post offices and postal agencies declined. Overall, the number of staffed access points had fallen by 11 by the end of 2024 (previous year: -21).

The number of districts with home service rose to 1,911 by the end of 2024, a year-on-year increase of 13 districts. This rise was due to the fact that postal agencies were closed and replaced with the home service. The number of households in Switzerland receiving a home service also grew to 517,286. Nationwide, 11.2% of households are covered by the home service.

During the reporting period, Swiss Post did not notify any communes of post office or postal agency relocations. Despite this, two communal authorities made submissions to PostCom. One of these related to the Perly post office, while the other was connected to the Morge 2 La Gottaz postal agency. In 49 locations, Swiss Post reached amicable solutions with the relevant communal authorities.

Net cost calculation based on new hypothetical scenario

Under postal legislation, the additional costs incurred by the universal service obligation are defined as net costs. In order to determine these costs, Swiss Post provides PostCom with a hypothetical scenario of its business activities with the universal service obligation excluded.

In 2024, Swiss Post requested a fundamental revision of the hypothetical scenario, which was based largely on industry comparisons from 2013. The postal market has changed significantly since then: the letter and postal markets, and to a lesser extent customer transactions in post offices (particularly over-the-counter inpayments), have evolved in different ways. In addition, the hypothetical scenario must be based on the needs of the public and the economy, as this is the only way to calculate the net costs of the universal service realistically. In order to validate and verify the hypothetical scenario, Swiss Post also commissioned and took account of external reports from Swiss Economics and Copenhagen Economics.

PostCom reviewed the parameters of Swiss Post's new hypothetical scenario and approved it through a ruling during the reporting year. It differs from the current situation in terms of the size and structure of the post office network, cash payment and consignment services, transit times, and home delivery coverage. The net costs for 2024 were determined based on the new hypothetical scenario. PostCom has approved the net costs calculation and the evidence of compliance with the net cost comparison requirements.

In response to advancing digitalisation, Swiss Post is aiming to leverage new technologies in order to open up fresh growth opportunities. The self-financing of the universal service is guaranteed in the medium term. In the longer term, Swiss Post can only guarantee this self-financing if it remains able to preserve its solid earning power.

Fewer violations of industry-standard working conditions

PostCom is responsible for monitoring whether industry-standard working conditions and minimum requirements are being met. In 2024, PostCom's reviews revealed fewer indications of violations of industry-standard working conditions than in previous years.

Since January 2019, 84 companies have been comprehensively audited, with supervisory proceedings initiated in 27 cases. The most frequent complaints related to compliance with contractually agreed weekly working hours (maximum of 44 hours), minimum hourly wage (CHF 19) and other labour law requirements. In some cases, criticism was levelled at inadequate recording of actual working hours, particularly in the case of employees earning flat-rate wages or remuneration systems based on predefined parameters. When assessing working time models, PostCom also takes account of solutions that are accepted by the social partners, such as those agreed for morning delivery of newspapers and magazines. These are laid down in collective employment contracts and are therefore regarded as standard in the industry.

Reports and proceedings under supervisory law

PostCom's Specialist Secretariat regularly receives submissions and complaints relating to the universal postal service from residents (known as citizens' enquiries), as well as various queries or complaints that do not fall under the commission's remit. In 2024, PostCom received 73 submissions, a decline of around a fifth compared to the previous year. The complaints related to issues such as incorrect, lost or late deliveries. A significant proportion of the submissions concerned Swiss Post services and sectors that do not fall under PostCom's remit, including delivery of unaddressed consignments and electronic services. In 2024, three submissions were received in relation to other postal services providers (2023: 4).

In ten cases, PostCom opened administrative proceedings to review the location of a letter box (2023: 19). During the reporting year, it concluded seven proceedings with a decision on the substance of the case (2023: 16), upholding one request and rejecting six (2023: 16 rejections). Three proceedings were abandoned following withdrawal of the request (2023: 2).

As in 2023, PostCom did not issue any rulings (final judgments) relating to home delivery in 2024.

Conciliation authority still in high demand

The conciliation authority Ombud-PostCom has been led by its new head Claudia Scheiner since the start of July 2024. She took on the role from Dr Marianne Sonder, who had been at the helm since the service was created in 2013. During the reporting year, Ombud-PostCom handled a total of around 2,600 contacts (queries, questions, requests, and correspondence with applicants and providers) and opened 78 cases. Seventy-two cases were resolved. According to the new head of the conciliation authority, a strong tendency is emerging for customers to defend themselves more frequently and more vehemently, often on matters of principle.



Outlook

Traditional postal operators in Europe and Switzerland have mainly built their activities around the letter market. Until the early 2000s, Swiss Post's parcel business was loss-making and had to be subsidised by other areas of the PTT, as it was called at the time.

When the market was opened up to competition, a universal service was established to offer postal services at reasonable prices to all population groups in all regions of the country. These services, as well as requirements for their quality and accessibility, were set out in legislation that is currently still in force.

Letter volumes have been falling for around 15 years due to the rise of electronic communication and the public's changing needs. This decline accelerated during the COVID-19 crisis and has continued to do so since.

By contrast, parcel volumes have risen sharply over the same period, although this development has not offset the decline in letter volumes. In addition, private postal services providers in Switzerland increased their market share in the domestic parcels segment for the second year in a row in 2024, although there had previously been little movement since the parcel market was liberalised in 2004. This general trend can also be seen in other countries. According to the European Regulators Group for Postal Services (ERGP), letter volumes shrank by 12 billion consignments between 2019 and 2023, while parcel volumes rose by around five billion consignments.

Combined with low profit margins on parcels, the decline in letter volumes has had a direct impact on the financial situation of established European postal operators and thus on their ability to finance universal services. In light of this erosion, several European countries have relaxed some universal service obligations and supported historical postal operators with state subsidies. In other countries, traditional European postal services providers are investing in new activities, particularly in the electronic services and logistics sectors, to ensure they can continue financing the universal postal service.

The situation in Denmark is unique, as the postal services provider PostNord has handed its universal service mandate and letter delivery services to DAO, a private Danish logistics company. From 1 January 2026, PostNord will only operate in the parcel delivery market in Denmark.

By international standards, the range and quality of the universal service in Switzerland remain particularly high. Clouds are looming on the horizon, however, and Switzerland cannot avoid a fundamental debate on how to adapt the universal service and its financing to the new conditions.

On 16 April 2025, the Federal Department of the Environment, Transport, Energy and Communications (DETEC) initiated a consultation procedure on the revision of PostSO (see press release at <https://www.uvek.admin.ch/en>). The draft revision of PostSO includes a change to Swiss Post's home delivery obligation, a reduction in delivery quality targets, and access to electronic payment transactions. The consultation draft also includes comprehensive regulations for a hybrid delivery system, which is defined as part of the universal postal service: Swiss Post should offer every customer the option to send consignments electronically. The draft revision also tasks PostCom with specific supervisory functions over Swiss Post's hybrid delivery system. However, it will not be possible to analyse the final regulations until the consultation is complete. The PostSO amendment is expected to enter into force on 1 January 2026.

Other issues relating to improving market regulation are also under discussion. In addition, several recent European studies emphasise the need for the universal service to take better account of the requirements of vulnerable users, such as people living in rural or remote areas, people on low incomes, people without digital skills, people with visual impairments, and people with restricted mobility.

PostCom will continue to provide support for all future legislative amendments affecting the postal sector.



About PostCom

PostCom is an independent authority that oversees the Swiss postal market and monitors the quality of the universal postal service. It fulfils the tasks assigned to it in accordance with postal legislation provisions. During administrative proceedings, PostCom considers each case individually in accordance with its statutory mandate and its own established practice. PostCom also keeps the public informed about its activities and proposes measures to the Federal Council that will support PostCom in fulfilling its tasks. Administratively, it is affiliated to the Federal Department of the Environment, Transport, Energy and Communications (DETEC).



PostCom (standing, from left to right): Ivan Progin, Andrea Stegmann (Deputy Head of Specialist Secretariat), Micol Morganti Perucchi, Patrick Kessler and Michel Noguét (Head of Specialist Secretariat).
Sitting from left to right: Patrick Salamin, Anne Seydoux-Christe, Valérie Défago and Robert Göx. .

Mandate and activities

PostCom makes decisions and issues rulings within the remit set out in the Postal Services Act (PostSA) and its implementing provisions.

PostCom primarily performs the following tasks:

- Monitoring compliance with the statutory universal service obligation, particularly with regard to proceedings relating to letter box locations and home delivery.
- Making recommendations on planned closures and relocations of staffed access points (post offices and postal agencies).
- Ensuring quality control of the universal postal service.

- Monitoring compliance with the ban on cross-subsidisation and disclosure of net costs.
- Reporting to the Federal Council and Parliament. If necessary, it proposes appropriate measures to the Federal Council to safeguard the universal service.
- Registering postal services providers.
- Monitoring whether industry-standard working conditions are being met and collective employment contract negotiations are being conducted.
- Deciding on disputes concerning access to post office box facilities and address data processing.
- Monitoring compliance with information and disclosure requirements.
- Pursuing and ruling on violations.
- Monitoring developments in the postal market with a view to ensuring a diverse, affordable and high-quality service throughout the country. To this end, it is in constant dialogue with all actors in the postal market.
- Responding to citizens' enquiries and informing the public and all other stakeholders of its activities in an annual report.

International relations

PostCom is represented in the European Committee for Standardization (CEN), whose mission is to set European standards for postal services. It is also a member of the Swiss Association for Standardization (SNV), which acts as a hub for national and international standards within Switzerland.

In 2021, PostCom was excluded from the work of the ERGP because Switzerland and the European Union (EU) were unable to reach a consensus on the framework agreement. However, PostCom is still maintaining its relations with several European regulatory authorities.

Working with other regulatory authorities, PostCom has established an annual international workshop for postal regulators. The third round of the workshop was held in Athens in December 2024, with around 20 postal regulators from various European countries and the United States taking part. The next round is planned for 2025,

Other postal supervisory authorities

During the total revision of postal legislation, the remits of the authorities responsible for postal issues were partially reorganised. As of 1 October 2012, the following authorities are involved in supervising the postal system alongside PostCom:

The federal government manages its independent entities (Swiss Post, SBB, Swisscom, etc.) at strategic level through overarching and medium-term objectives. The strategic goals set by the Federal Council are a key instrument in the federal government's ownership policy. Parliament has overall supervisory control and is authorised to mandate the Federal Council to set or update strategic goals (Art. 28 para. 1 and 1bis ParlA).

Within this framework, the Federal Council acts as Swiss Post's owner. The Federal Department of the Environment, Transport, Energy and Communications (DETEC), as the specialist department, and the Federal Finance Administration (FFA) share responsibility for preparing and coordinating owner policy matters for the Federal Council and exercise shareholder rights in Swiss Post on behalf of the Federal Council. This dual model is particularly relevant to spun-off entities such as Swiss Post, which provide services on the market and/or with monopoly status and are also of considerable importance to the federal budget.

The Federal Office of Communications (OFCOM) is responsible for drawing up postal policy for DETEC. It also prepares the Federal Council's decisions on monopoly pricing and reduced delivery prices for indirect press subsidies. Furthermore, it is responsible for a range of tasks regulated by PostSA: for example, it supervises the universal service for payment transactions, assesses applications for indirect press subsidies, and coordinates the representation of Swiss interests in international organisations.

The Price Supervisor, meanwhile, is responsible for pricing for segments outside the monopoly. He is consulted on adjustments to monopoly pricing and issues recommendations. Financial market supervision of PostFinance Ltd is handled by the Swiss Financial Market Supervisory Authority (FINMA).