

**POSTAL SERVICES OPERATED  
IN COMPETITION  
Statistical Information  
4th Quarter 2008**

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## POSTAL SERVICES

### PREVIOUS NOTES:

1) Due to updates to data sent by certain providers, corrections have been made to the figures given for traffic and the postal network since the beginning of 2008.

2) Due to the fact that certain operators failed to send statistical information on time, the information from these providers was not considered in the present report. It is estimated that the weighting of these operators, in terms of the various indicators given, is less than 1 per cent of the total.

The information below concerns postal services whose operation is liberalised. Postal services operated in competition are considered to be those encompassing mailed correspondence whose price exceeds 2.5 times the reference tariff (Priority Mail up to 20 grams) and weighing more than 50 grams. Reserved services are therefore excluded.

### 1. Postal Service Providers

Postal services operated in competition are provided conditional to the operator being granted an authorisation or licence<sup>1</sup>.

During the fourth quarter of 2008 (4Q08), ICP-ANACOM did not grant any new legal authorisations<sup>2</sup> for the provision of non-reserved postal services outside the scope of the universal service, whereas the authorisation previously granted to one undertaking was repealed.

<sup>1</sup> The provider of the universal service may, equally, provide postal services operated in competition.

<sup>2</sup> Authorised undertakings are authorised to provide Express Mail services, which services are characterised by acceptance / collection, handling, transportation and distribution with increased rapidity, of correspondence and parcels, with the respective services differentiated based on the execution, inter alia, of the following additional characteristics: pre-determined delivery deadline; tracking; liability guarantee from authorised provider; routing control..

Accordingly, there are now 61 operators holding authorisation to provide express mail postal services as at the end of 4Q08<sup>3</sup> (See Table 1).

In respect of services not covered by the express mail category, no new operators were granted licensing during 4Q08, and therefore the total number of licensed providers remained at 11<sup>4</sup>. One of these operators is the Universal Postal Service concessionaire (CTT) which operates according to the respective Concession Contract.

**Table 1. Number of licensed providers**

	4Q07	1Q08	2Q08	3Q08	4Q08
<b>Express mail services</b>	54	60	60	62	61
<b>Services not covered by the express mail category</b>	10	10	10	11	11

It should be noted that while *CTTexpresso* is legally qualified to simultaneously provide express mail services and services not covered by the express mail category, it continues to exclusively offer express mail services.

<sup>3</sup> See Annex.

<sup>4</sup> Licensed undertakings are authorised for the provision of non-reserved postal services, including correspondence, books, catalogues, newspapers and other periodical publications and postal parcels (postal services not covered by the express mail category).

## 2. Traffic of postal services operated in competition

During 4Q08, traffic from postal services operated in competition totalled 71.6 million items, representing 23 per cent of the quarter's total postal traffic.

Traffic in liberalised services increased by 16 per cent over the previous quarter, while falling by 7.4 per cent compared to the same quarter of 2007.

There is typically an increase in the last quarter of the year due to the Christmas period.

### a) Postal traffic operated in competition - by destination

During the quarter being reported, the volume of *national* postal traffic totalled around 66.9 million objects, while *outgoing international* traffic registered 4.7 million objects (See Table 2). *National* traffic made up 93 per cent of total postal traffic operated in competition, with *outgoing international traffic* representing 7 per cent.

**Table 2. Postal traffic operated in competition – by destination**

	4Q07	1Q08	2Q08	3Q08	4Q08	Qtly change	Annual change
<b>Postal traffic</b>	<b>77 367</b>	<b>68 349</b>	<b>68 411</b>	<b>61 817</b>	<b>71 619</b>	<b>15.9%</b>	<b>-7.4%</b>
National	71 709	62 924	63 442	57 033	66 896	17.3%	-6.7%
International (outgoing)	5 658	5 425	4 970	4 784	4 723	-1.3%	-16.5%
International (incoming)	4 582	4 869	4 371	4 052	4 969	22.6%	8.5%

Unit: thousands of items

National traffic, which rose by 17.3 per cent over the previous quarter, was the main contributor to the rise in postal traffic seen in the quarter. The increase in national traffic is explained by trends in editorial mail, addressed publicity and addressed correspondence of the CTT group. Meanwhile, international outgoing traffic fell by 1.3 per cent, impacted by the downward trend seen for editorial mail of providers covered by the express mail category.

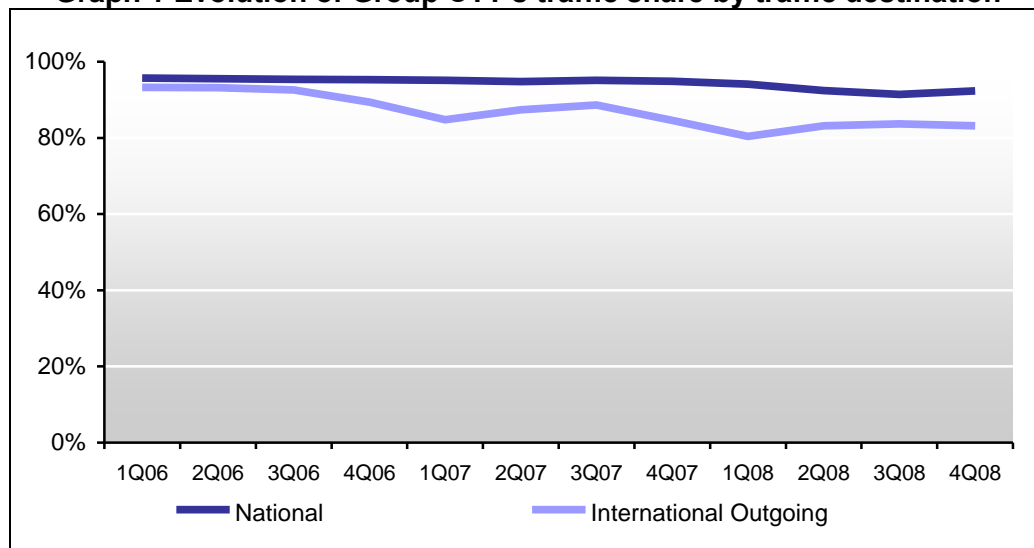
Compared to the same quarter of 2007, traffic fell by 7.4 per cent due, above all, to the fall seen in national and international correspondence and addressed publicity of CTT.

In the liberalised area, Grupo CTT was responsible for around 92 per cent of *national traffic* and for around 83 per cent of *outgoing international traffic* (See Table 3 and Graph 1).

**Table 3. Postal traffic shares - by destination**

	4Q07		1Q08		2Q08		3Q08		4Q08	
	Grupo CTT	Others	Grupo CTT	Others	Grupo CTT	Others	Grupo CTT	Others	Grupo CTT	Others
National	94.9%	5.1%	94.1%	5.9%	92.4%	7.6%	91.4%	8.6%	92.3%	7.7%
Int. (out)	84.6%	15.4%	80.4%	19.6%	83.2%	16.8%	83.7%	16.3%	83.2%	16.8%
Int. (in)	79.2%	20.8%	80.8%	19.2%	79.1%	20.9%	78.8%	21.2%	80.9%	19.1%

**Graph 1 Evolution of Group CTT's traffic share by traffic destination**



**b) Postal traffic operated in competition - by service**

During this period, 5.5 million of the total 71.6 million liberalised postal objects fell within the express mail category, with around 66 million being encompassed by the remaining service categories (See Table 4). Express mail therefore accounted for around 8 per cent of total traffic operated in competition, with the remaining categories making up 92 per cent.

**Table 4. Postal traffic operated in competition - by service**

	4Q07	1Q08	2Q08	3Q08	4Q08	Qtrly. change	Annual change
<b>Postal traffic</b>	<b>77 367</b>	<b>68 349</b>	<b>68 411</b>	<b>61 817</b>	<b>71 619</b>	<b>15.9%</b>	<b>-7.4%</b>
Express	4 960	4 551	4 969	4 799	5 486	14.3%	10.6%
Non-express	72 406	63 798	63 442	57 018	66 133	16.0%	-8.7%

Unit: Thousands of objects

As can be seen, the traffic of services covered by the express mail category grew by 14.3 per cent compared to 3Q08 and by 10.6 per cent compared to the same quarter of 2007. This increase is, above all, as a result of the trend in national parcels (See Table 4).

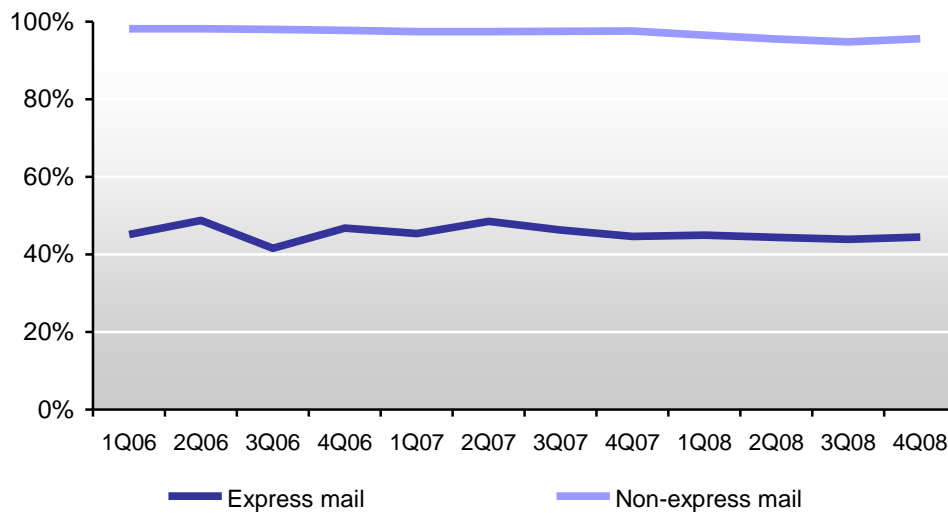
Non-express services grew significantly over the quarter but fell in year-on-year terms, due to the reasons behind the quarterly increase and annual fall in postal traffic given in the previous section.

In terms of the offer structure, it can be seen that in 4Q08 the companies of Grupo CTT retained a share of 44.5 per cent of express mail traffic and 95.6 per cent of non-express mail traffic (See Table 5 and Graph 2).

**Table 5. Postal traffic shares - by service**

	4Q07		1Q08		2Q08		3Q08		4Q08	
	Grupo CTT	Others	Grupo CTT	Others	Grupo CTT	Others	Grupo CTT	Others	Grupo CTT	Others
Express	44.6%	55.4%	45.0%	55.0%	44.4%	55.6%	43.9%	56.1%	44.5%	55.5%
Non-express	97.6%	2.4%	96.5%	3.5%	95.5%	4.5%	94.8%	5.2%	95.6%	4.4%

**Graph 2 Evolution of Grupo CTT traffic share by type of service**



**c) Postal items per capita (liberalised services)**

Table 6 shows the *postal items per capita* index. In 4Q08, this indicator stood at 6.7 postal objects distributed per inhabitant, of which 6.3 correspond to national postal services.



**Table 6. Postal items per capita - services operated in competition <sup>(1)</sup>**

	4Q07	1Q08	2Q08	3Q08	4Q08
<b>Postal traffic / inhabitant</b>	7.3	6.4	6.4	5.8	6.7
National postal traffic / inhabitant	6.8	5.9	6.0	5.4	6.3
Outgoing international postal traffic / inhabitant	0.5	0.5	0.5	0.5	0.4
Incoming international postal traffic / inhabitant	0.4	0.5	0.4	0.4	0.5

<sup>(1)</sup> The total resident population at 31 Dec. 2007 was 10,617,575 inhabitants. Source: INE (Statistics Portugal).

### 3. Postal network indicators

Below some indicators are given from the postal network, in the areas of human resources, material resources and postal coverage and density:

#### a) Human resources

As at the end of 4Q08 there were over 16.4 thousand people working in liberalised postal services, 807 less than in the previous quarter (See Table 7). This quarterly change is directly affected by changes in the indicators for Grupo CTT, where the number of staff on fixed term contracts customarily spikes during the second and third quarters of each year as a result of the holiday periods.

**Table 7. Human resources** <sup>(1)</sup>

	4Q07	1Q08	2Q08	3Q08	4Q08
<b>Total workforce</b>	<b>16 441</b>	<b>16 351</b>	<b>17 085</b>	<b>17 166</b>	<b>16 359</b>
Grupo CTT	14 026	13 845	14 509	14 566	13 765
Other providers	2 415	2 506	2 576	2 600	2 594

Unit: number of staff

<sup>(1)</sup> In the case of the providers which failed to send information, the values considered were those reported in previous quarters.

**a) Material resources , postal coverage and density**

In final quarter of 2008 there was a considerable reduction in the number of access points (See Table 8), due to figures given by Grupo CTT. This essentially reflects a reduction in the number of post boxes in rural areas. As a result, *postal coverage* fell to an average of 20 access points per 100 Km<sup>2</sup> (See Table 9).

**Table 8. Material resources** <sup>(1)</sup>

	4Q07	1Q08	2Q08	3Q08	4Q08
<b>Access points</b> <sup>(2)</sup>	<b>18 852</b>	<b>18 867</b>	<b>18 854</b>	<b>18 849</b>	<b>18 501</b>
Grupo CTT	18 733	18 731	18 717	18 710	18 357
Other providers	119	136	137	139	144
<b>Distribution centres</b> <sup>(3)</sup>	<b>477</b>	<b>496</b>	<b>501</b>	<b>502</b>	<b>506</b>
Grupo CTT	384	384	384	384	383
Other providers	93	112	117	118	123
<b>Vehicle fleets</b> <sup>(4)</sup>	<b>5 737</b>	<b>5 913</b>	<b>5 989</b>	<b>5 983</b>	<b>5 933</b>
Grupo CTT	4 296	4 324	4 375	4 360	4 321
Other providers	1 441	1 589	1 614	1 623	1 612

<sup>(1)</sup> In the case of the providers which failed to send information, the values considered were those reported in previous quarters.

<sup>(2)</sup> Physical locations where users can deposit mail in the postal network, thus encompassing post boxes whether placed or not in a public space.

<sup>(3)</sup> Physical space where mail is sorted according to the destination area.

<sup>(4)</sup> Fleet of vehicles held and/or subcontracted to provide postal services.

**Table 9. Postal Coverage <sup>(1)</sup>**

	4Q07	1Q08	2Q08	3Q08	4Q08
Access Points / 100Km <sup>2</sup>	20.5	20.5	20.5	20.5	20.1

<sup>(1)</sup> Source: INE (Statistics Portugal). Portugal's total area is 92.090 Km<sup>2</sup>

As a consequence the *postal density* index rose in 4Q08 to at an average of 574 inhabitants per available access point (See Table 10), giving a reduction in postal density.

**Table 10. Postal density <sup>(1)</sup>**

	4Q07	1Q08	2Q08	3Q08	4Q08
Inhabitants / access point	563	563	563	563	574

<sup>(1)</sup> Source: INE (Statistics Portugal) – The total resident population at 31 Dec. 2007 was 10,617,575 inhabitants.

**Annex. Authorized postal service providers as at the end of 4Q08**

**Services not included in the express mail category**

Company	Licence no	Issue Date	Services Provided
CTT Correios de Portugal, SA	The universal postal service concessionaire (CTT) is allowed to operate non-reserved postal services not within the scope of the universal service, with exemption from additional authorization title.		Sending of correspondence, including addressed mail (Direct Mail), books, catalogues, newspapers and other periodicals. Postal parcels.
CTTexpresso - Serviços Postais e Logística, SA	ICP-01/2001-SP	01 Oct. 2001	Sending of correspondence, including addressed mail (Direct Mail), books, catalogues, newspapers and other periodicals. Postal parcels.
SDIM - Sociedade de Distribuição de Imprensa da Madeira, Lda	ANACOM-01/2002-SP	13 Dec. 2001	Distribution of books, catalogues, newspapers and other periodicals.
Notícias Direct - Distribuição ao Domicílio, Lda	ANACOM-02/2002-SP	13 Dec. 2001	Distribution of books, catalogues, newspapers and other periodicals.
MEEST Portugal - Unipessoal, Lda.	ICP-01/2005-SP	07 Jul. 2005	Postal parcels.
TEX - Transporte de Encomendas Expresso, Lda.	ICP-02/2005-SP	15 Jul. 2005	Postal parcels.
IBEROMAIL - Correio Internacional, Lda.	ICP-01/2006-SP	18 May 2006	Distribution of books, catalogues, newspapers and other periodicals.
LORDTRANS - Transportes Urgentes, Lda.	ICP-02/2006-SP	28.Dec.2006	Distribution of postal items and parcels.
POST 21 - Empresa de Correio, S.A.	ICP-01/2007-SP	04.May 2007	Sending of correspondence, including addressed mail (Direct Mail), books, catalogues, newspapers and other periodicals. Postal parcels.
VASP PREMIUM - Entrega Personalizada de Publicações, Lda.	ICP-ANACOM-02/2007	23.Jul.2007	Distribution of books, catalogues, newspapers and other periodicals.
Celeris	ICP-ANACOM-01/2008-SP	22.Jul.2008	Sending of correspondence, including addressed mail (Direct Mail), books, catalogues, newspapers and other periodicals. Postal parcels.

### Serviços de Express Mail

Company	Licence no.	Issue Date	Service Provided
CTTexpresso - Serviços Postais e Logística, SA (1)	ICP-01/2001-SP	01 Oct. 2001	Express Mail
DHL - Express Portugal, Lda	ICP-03/2001-SP	13 Dec. 2001	Express Mail
Chronopost Portugal - Transporte Internacional, SA	ICP-04/2001-SP	13 Dec. 2001	Express Mail
TNT Express Worldwide (Portugal), SA	ICP-05/2001-SP	13 Dec. 2001	Express Mail
UPS of Portugal - Transportes Internacionais de Mercadorias, Lda	ANACOM-01/2002-SP	17 Oct. 2002	Express Mail
Rangel Expresso, SA	ANACOM-02/2002-SP	19 Dec. 2002	Express Mail
Federal Express Corporation - Sucursal em Portugal	ANACOM-01/2003-SP	10 Apr. 2003	Express Mail
Ibercourier - Serviço de Transporte Urgente, Lda. (MRW) (2)	ANACOM-01/2005-SP	09 Feb. 2005	Express Mail
Logista - Transportes, Lda.	ANACOM-02/2005-SP	09 May 2005	Express Mail
Lisespo - Transportes, Lda. (4)	ANACOM-03/2005-SP	15 Jul. 2005	Express Mail
Transworld Express - Express Mail, Lda. (3)	ANACOM-06/2005-SP	08 Sep. 2005	Express Mail
Nuno Miguel Alves, Unipessoal, Lda. (3)	ANACOM-07/2005-SP	08 Sep. 2005	Express Mail
Globe Logistics - Empresa de Courier, Logística e Transportes (3)	ANACOM-08/2005-SP	08 Sep. 2005	Express Mail
Fozpost - Entrega e Recolha de Encomendas, Lda.(3)	ANACOM-09/2005-SP	08 Sep. 2005	Express Mail
Mensageiro Azul - Serviços de Courier, Lda. (3)	ANACOM-10/2005-SP	08 Sep. 2005	Express Mail
RANEXPRESS - Transportes Rodoviários, Lda. (3)	ANACOM-11/2005-SP	08 Sep. 2005	Express Mail
Francisco & Silvina - Transportes de Documentos e Encomendas, Lda. (3)	ANACOM-13/2005-SP	08 Sep. 2005	Express Mail
MAILGLOBE - Transporte de Correio Urgente, Lda.(3)	ANACOM-14/2005-SP	08 Sep. 2005	Express Mail
EXPRESSODÃO - Transporte de Mercadorias, Lda.(3)	ANACOM-16/2005-SP	08 Sep. 2005	Express Mail
FOXIL - Gestão de Transportes, Lda. (3)	ANACOM-17/2005-SP	08 Sep. 2005	Express Mail
Transportes António Garcia & César, Lda. (3)	ANACOM-18/2005-SP	08 Sep. 2005	Express Mail
P.P.Expresso - Transportes de Mercadorias, Lda. (3)	ANACOM-19/2005-SP	08 Sep. 2005	Express Mail
JáEstá - Tráfego e Serviços Logísticos, Lda. (3)	ANACOM-21/2005-SP	08 Sep. 2005	Express Mail
Multitagus - Transportes e Serviços, Lda. (3)	ANACOM-22/2005-SP	27 Sep. 2005	Express Mail
Iberenvios - Actividades Postais e Transportes, Unipessoal, Lda. (3)	ANACOM-23/2005-SP	27 Sep. 2005	Express Mail
Princeps, Comércio por Grosso, Lda. (3)	ANACOM-24/2005-SP	04 Nov. 2005	Express Mail
Portomail - Transporte de Documentos e Encomendas, Lda. (3)	ANACOM-25/2005-SP	04 Nov. 2005	Express Mail
E.R. Encomendas Rápidas, Lda. (3)	ICP-ANACOM -26/2005-SP	23 Nov. 2005	Express Mail
FELCOURIER - Distribuição de Encomendas Nacional e Internacional, Lda. (3)	ANACOM-02/2006-SP	02. Feb. 2006	Express Mail
HMJ - Envio Rápido de Encomendas, Lda. (3)	ANACOM-03/2006-SP	02. Feb. 2006	Express Mail
Flash Transportes Unipessoal, Lda. (3)	ANACOM-04/2006-SP	02. Feb. 2006	Express Mail

Company	Licence no.	Issue Date	Service Provided
Transportes Ochôa, S.A.	ANACOM-05/2006-SP	02. Feb. 2006	Express Mail
LHSTUR - Transportes Urgentes, Estafetagem, Lda.(3)	ANACOM-06/2006-SP	07. Feb. 2006	Express Mail
Consigo Pelo Mundo - Transporte e Entrega de Documentos, Unipessoal, Lda. (3)	ANACOM-07/2006-SP	07. Feb. 2006	Express Mail
António Carlos Santos - Entregas Rápidas, Unipessoal, Lda. (3)	ANACOM-08/2006-SP	09. Mar. 2006	Express Mail
ASL Courier, Lda. (3)	ANACOM-09/2006-SP	08 Jun. 2006	Express Mail
ABASTFROTA - Transportes, Lda. (5)	ICP-ANACOM-01/2007-SP	12.Oct.2007	Express Mail
TRANSALCAINÇA - Transportes, Lda (5)	ICP-ANACOM-02/2007-SP	12.Oct.2007	Express Mail
António Moreira Unipessoal, Lda. (5)	ICP-ANACOM-03/2007-SP	12.Oct.2007	Express Mail
SERVEXCELSELO - Actividades postais e transportes, Lda. (5)	ICP-ANACOM-04/2007-SP	12.Oct.2007	Express Mail
PARMILHAR TRILHOS - Transportes, Unipessoal, Lda. (5)	ICP-ANACOM-05/2007-SP	12.Oct.2007	Express Mail
OBIK EXPRESS - Serviço de transportes, Unipessoal, Lda. (5)	ICP-ANACOM-06/2007-SP	12.Oct.2007	Express Mail
J. FARINHA - Transportes urgentes, Unipessoal Lda. (5)	ICP-ANACOM-07/2007-SP	12.Oct.2007	Express Mail
OVERSPEED - Transportes de Express Mail, Lda. (5)	ICP-ANACOM-08/2007-SP	12.Oct.2007	Express Mail
MEIA CURVA - Transporte de Express Mail, Lda.(5)	ICP-ANACOM-09/2007-SP	12.Oct.2007	Express Mail
URBEXPRESS - Transportes expresso, Lda. (5)	ICP-ANACOM-10/2007-SP	12.Oct.2007	Express Mail
MASTERPOST, Unipessoal, Lda. (5)	ICP-ANACOM-11/2007-SP	12.Oct.2007	Express Mail
VASTA SELECÇÃO - Comércio e serviços, Lda. (5)	ICP-ANACOM-12/2007-SP	12.Oct.2007	Express Mail
MENDES & PEREIRA SOUSA, Lda. (5)	ICP-ANACOM-13/2007-SP	23.Nov.2007	Express Mail
JOAQUIM LUIZ MARTHA, Lda. (5)	ICP-ANACOM-14/2007-SP	23.Nov.2007	Express Mail
ATLANTILÉGUA - Serviços postais, Lda. (5)	ICP-ANACOM-15/2007-SP	23.Nov.2007	Express Mail
STARTJOB - Recolhas e Entregas, Unipessoal, Lda. (3)	ICP-ANACOM-16/2007-SP	27.Dec.2007	Express Mail
JOSÉ MANUEL ARAÚJO SILVA - Serviço de Transporte Urgente, Unipessoal, Lda. (3)	ICP-ANACOM-17/2007-SP	27.Dec.2007	Express Mail
TOTALMÉDIA - entregas ao domicílio, S.A.	ICP-ANACOM-02/2008-SP	22.Jan.2008	Express Mail
MANOBRA JOVEM - Transportes, Lda (5)	ICP-ANACOM-03/2008-SP	12.Mar.2008	Express Mail
VIANICLE - Unipessoal, Lda (5)	ICP-ANACOM-04/2008-SP	27.Mar.2008	Express Mail
RITMO VELOZ, Lda (3)	ICP-ANACOM-05/2008-SP	14.Mar.2008	Express Mail
LEVADO À LETRA - Transportes e Serviços, Lda (3)	ICP-ANACOM-06/2008-SP	14.Mar.2008	Express Mail
Adicional - distribuição e gestão comercial, SA	ICP-ANACOM-07/2008-SP	18.Jun.2008	Express Mail
Serv. Postais da Lezíria (5)	ICP-ANACOM-08/2008-SP	17.Jul.2008	Express Mail
Iberperímetro (5)	ICP-ANACOM-09/2008-SP	28.Aug.2008	Express Mail

- (1) On 1 September 2003 ANACOM authorized the transmission of the licence held by POSTEXPRESSO - Correio de Cidade, Lda. to POSTLOG - Serviços Postais e Logística, S.A which, after 4Q04, has been designated CTTexpresso - Serviços Postais e Logística, S.A.
- (2) The MRW brand is the property of the company IBERCOURIER.
- (3) Companies providing postal services under the MRW brand through franchising.
- (4) Companies providing postal services under the SEUR brand through franchising.
- (5) Companies providing postal services under the NACEX brand through franchising.
- (6) The Nacex brand is the property of the company Logista.