BİLGİ TEKNOLOJİLERİ VE İLETİŞİM KURUMU

TURKISH POSTAL SECTOR

MARKET DATA REPORT

2022

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EXECUTIVE SUMMARY

- At the end of 2022, a total of 40 service providers, 24 of which are national and 16 of which are local, are authorized to provide postal services.
- In 2022, the revenues in the postal sector increased by 85.6 %compared to the previous year and increased to approximately 33.6 billion ₺ in total.
- In 2022, the investment amount in the postal sector was approximately 2.7 billion ₺.
- In 2022, the number of letter posts in the postal sector in Türkiye was 576.7 million.
- Other postal shipments, which are not classified as letter posts but are considered as postal parcels/cargo, have shown an increasing trend in numbers over the years. In 2022, it has exceeded approximately 1 billion 145 million units.
- In 2022, approximately 4.6 billion ₺ revenue was generated from letter posts.
- In 2022, approximately 28.9 billion Turkish Lira (₺) revenue was generated from postal parcel/cargo shipments.
- Approximately 65 %of all postal cargo/parcel shipments in 2022 consist of intercity shipments.
- As of the end of 2022, a total of 9,546 postal agencies/branches are serving throughout Türkiye.
- As of the end of 2022, the postal sector employs a workforce of 96,397 employees.

1. STRUCTURE OF THE POSTAL SECTOR

In this section, which discusses the structure of the postal sector, the distribution of postal service providers based on their authorization areas, as well as the number of branches/agents, will be addressed.

1.1. Distribution of Authorized Postal Service Providers by Document Type

As of the end of 2022, a total of 40 service providers, 24 national and 16 local, are authorized to provide postal services. In the local document type, the highest number of authorization licenses has been granted to Istanbul province. The table below shows the distribution of postal service providers according to the geographical scope of their authorization licenses.

Table 1: Distribution of Postal Service Providers (PSPs) by Geographical Scope They Serve

Number Of Postal Service Providers	
National	24
Istanbul	13
İzmir	1
Konya	1
Hatay	1
TOTAL	40

1.2. Distribution of Agency and Branch Numbers

As of the end of 2022, a total of 9,546 postal agencies/branches serve throughout Türkiye. Of these agencies/branches, 1,697 are located in Istanbul, 689 in Ankara, and 519 in Izmir. In addition, there are a total of 601 postal operations centers in Türkiye. The distribution of the number of branches/agents by periods is shown in Figure 1.

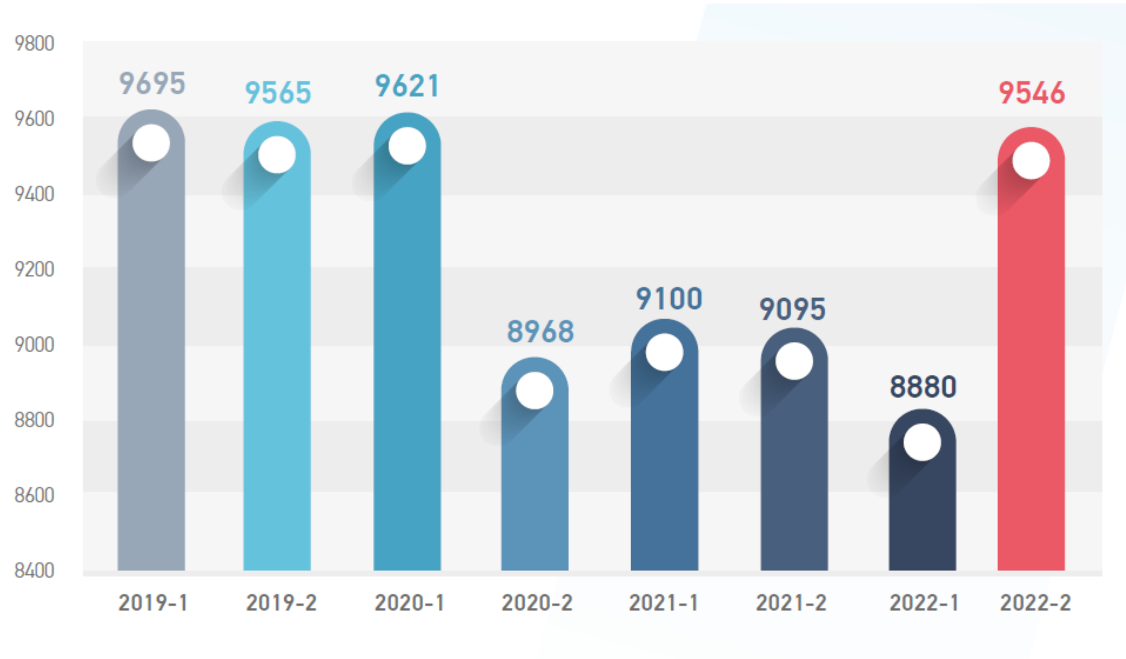

Figure 1: Number of Postal Branches/Agents by Period

2. POSTAL TRAFFIC AND VOLUME

In the postal sector, traffic and volume are addressed under two headings: "letter post" and "parcel/cargo shipment."

2.1. Letter Posts

In 2022, the number of letter posts in Türkiye's postal sector was 567.7 million. The variation in the number of letter posts by periods is shown in Figure 2[1].

[1] Under the Law No. 6475 on Postal Services (Law No. 6475), letter post is defined as "any type of shipment, including telegrams, prepared in written form on any physical medium or in electronic form, except for books, catalogs, newspapers, and periodicals, and which is required to be sent and delivered to the address specified by the sender."

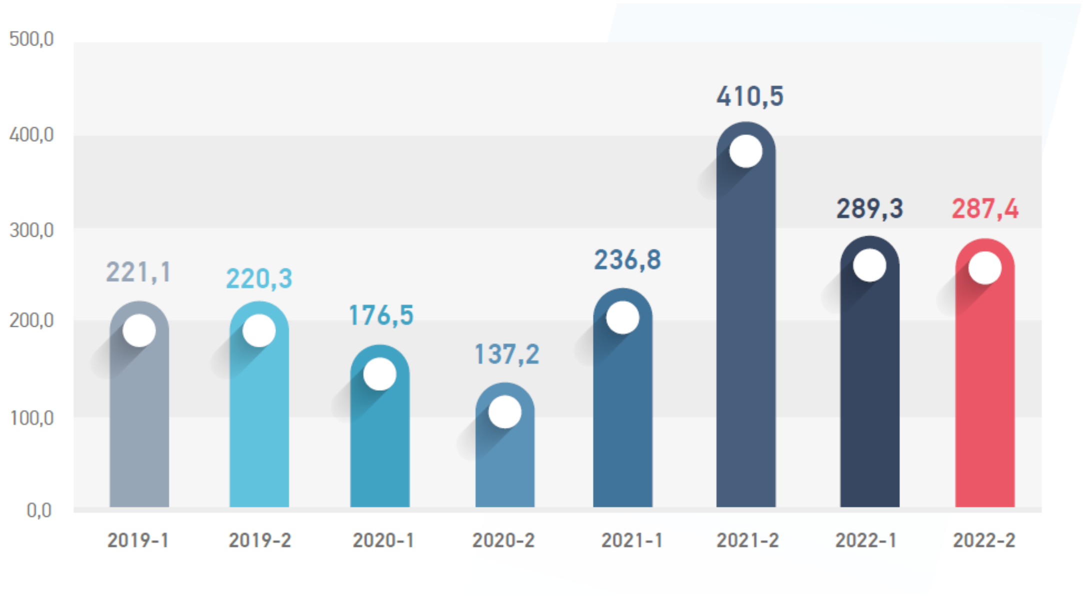

Figure 2: Distribution of Letter Posts by Periods (Million Units)

2.1.1. Distribution of Letter Posts by Weight

The proportional distribution of letter posts are classified into seven categories based on their weights, as shared by PTT (Turkish Post) with our Authority, “0-20 gr, 20-50 gr, 50-100 gr, 100-250 gr, 250-500 gr, 500-1000 gr, 1000-2000 gr,” is shown in Figure 3.

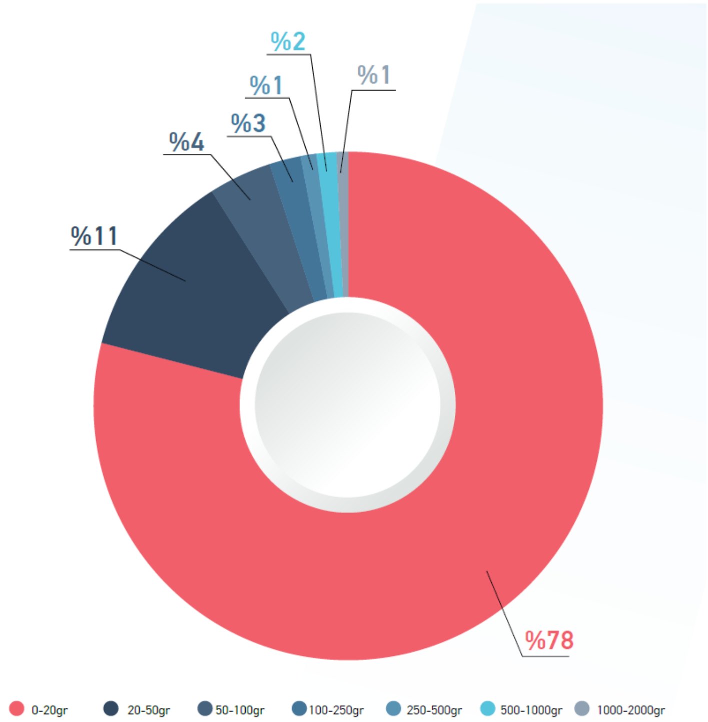

Figure 3: Proportional Distribution of Letter Posts by Weight (2022)

In this context, it is seen that letter posts are concentrated in the "0-20 gr" category with a rate of 78%. The rate of letter post in the "20-50 gr" range was calculated as 11%.

2.1.2. Distribution of Letter Posts by Delivery Place

Letter posts are divided into three different categories according to the place of delivery: intra-city, intercity, and international. Figure 4 shows the distribution of letter posts by delivery location on a period basis. It is observed that letter posts are predominantly in the intercity category, but it is also noted that the proportion of international shipments has increased in recent years.

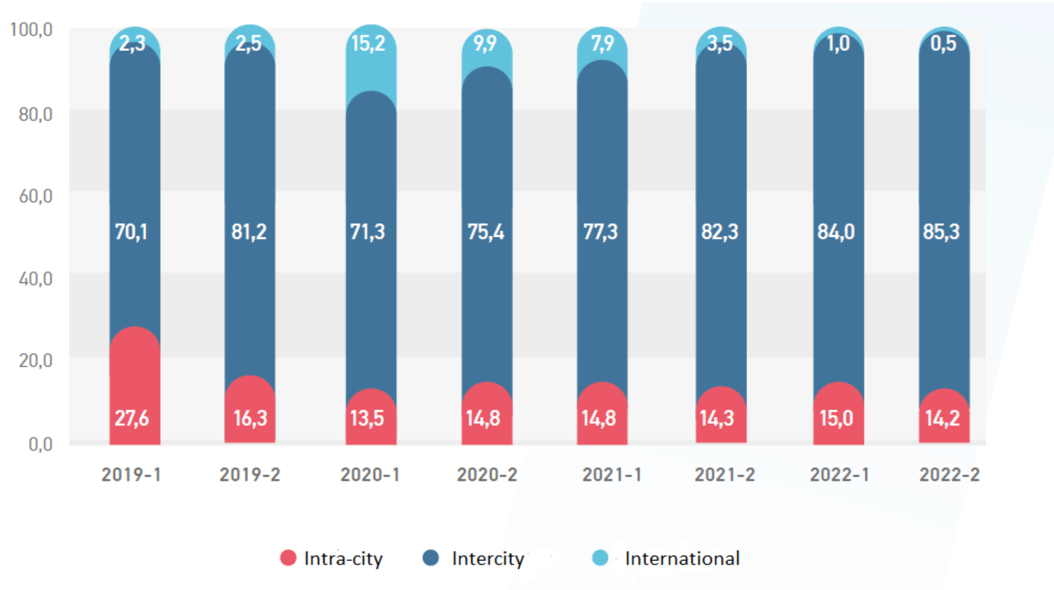

Figure 4: Distribution of Letter Posts by Place of Delivery (Piece Basis, %)

From the examination of the figure above, It is seen that the share of intercity shipments in all letter posts was approximately 84.6 %in 2022 and constituted the majority of the posts.

In 2022, the delivery of letter posts is most significant in the following provinces, respectively: Istanbul, Ankara, Izmir, Bursa, and Antalya.

2.2. Postal Parcel

It is seen that the number of other mail posts that remain in the form of a postal parcel or cargo, except for letter posts, tends to increase in years and is about 1 billion 145 million units in 2022[2]. This situation has a positive impact on the Türkiye postal market. The figures expressed are shown in Figure 5.

[2] According to the Law No. 6475 on Postal Services, postal parcel or cargo is defined as “any type of material with maximum weight of thirty kilograms or maximum volume of three hundred cubic decimeters that is sent via service providers and does not contain letters of communication”

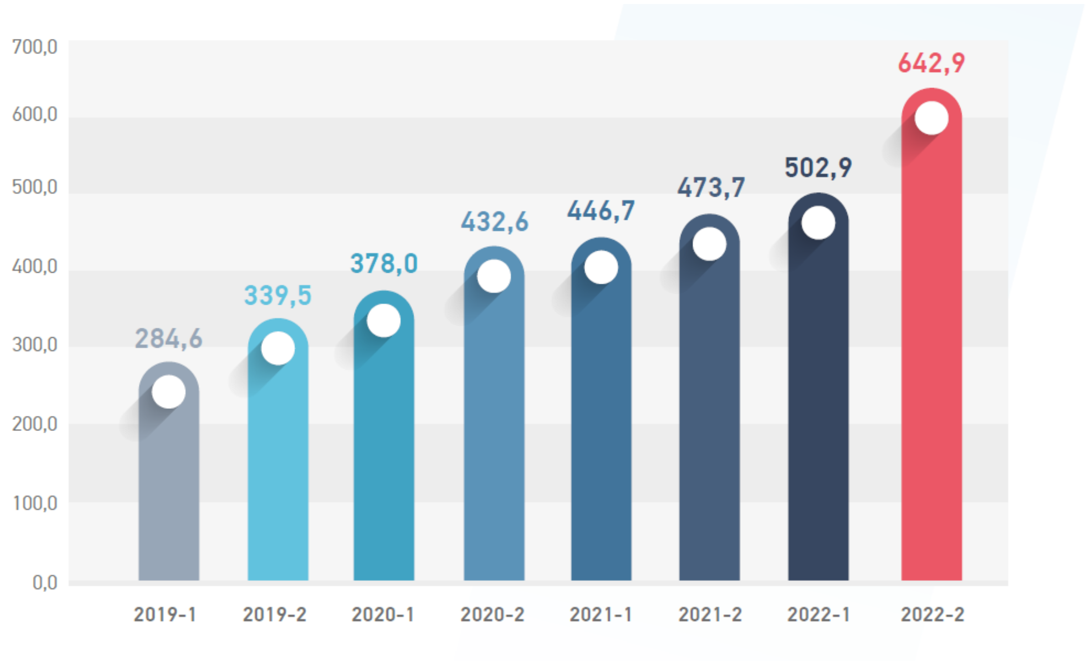

Figure 5: Distribution of Postal Parcel/Cargo Posts by Periods (Million Pcs)

According to Figure 5, the number of posts or cargo shipments, which was 624.1 million units in 2019, exceeded 1 billion 145 million in 2022 and increased by 84 %in the last 3 years.

2.2.1. Distribution of Postal Parcel/Cargo Posts on Weight Basis

Postal parcels/cargo shipments are classified in three different ways as "2 kg underneath", "2 kg to 20 kg," and "20 kg and 30 kg" according to their weight. The distribution of postal parcels/cargo shipments according to their weight in 2022 is shown in Figure 6.

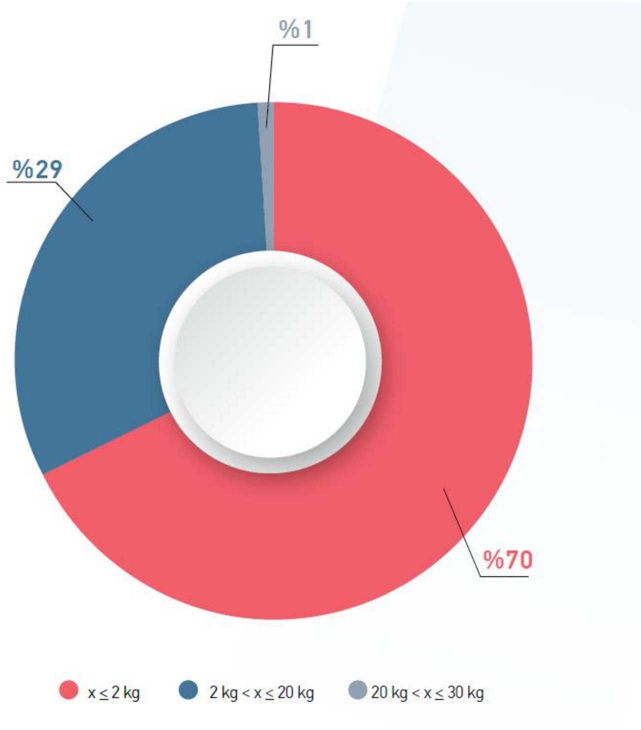

Figure 6: Distribution of Postal Parcel/Cargo Posts by Weight (2022)

Accordingly, approximately 70 % of the postal parcel/cargo shipments are 2 kg and 2-20 kg, while posts over 20 kg are only 1 % of the total shipments.

2.2.2. Distribution of Postal Parcel/Cargo Shipments on The Basis Of Corporate-Individual Shipment

Postal parcel/cargo shipments are evaluated in two classes as, individual and institutional, according to the shipping source. Figure 7 shows the individual and corporate shipment of mail posts periodically.

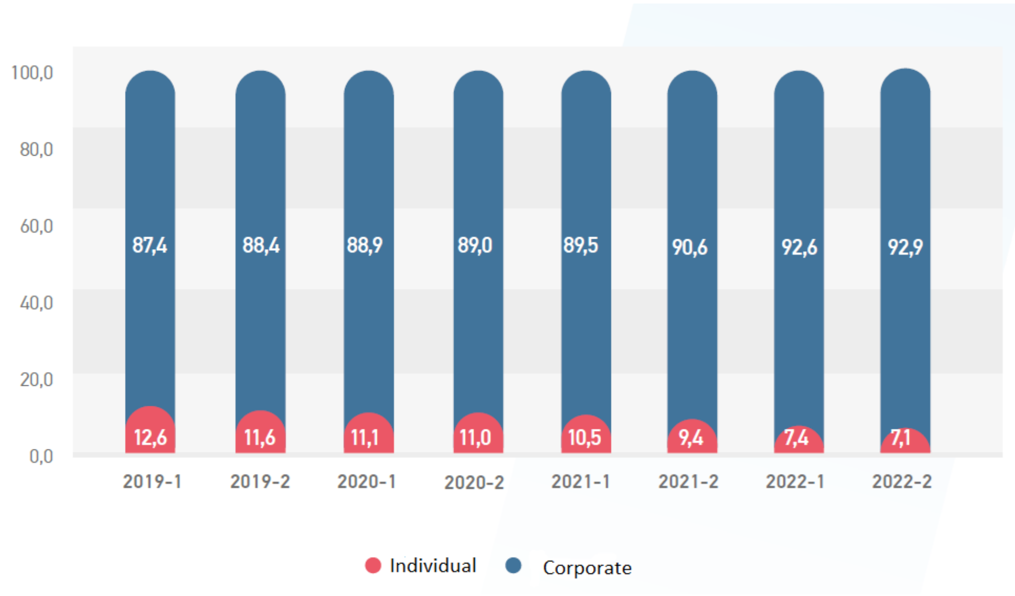

Figure 7: Individual-Corporate Shipment of Postal Posts on Period Basis, (%)

Accordingly, in 2022, more than 92 % of postal parcel/cargo shipments consisted of corporate shipments. In particular, with the intensive use of e-commerce platforms, the increase in corporate shipments has been higher than individual posts due to the increase in the density of shipments sent to consumers from an enterprise (Business to Consumer, B2C).

2.2.3. Distribution of Postal Parcel/Cargo Shipments by Place of Delivery

Postal parcel/cargo shipments are categorized into three different categories based on the delivery locations: intra-city, intercity, and international. The distribution of the dispatches based on the delivery locations over different periods is shown in Figure 9.

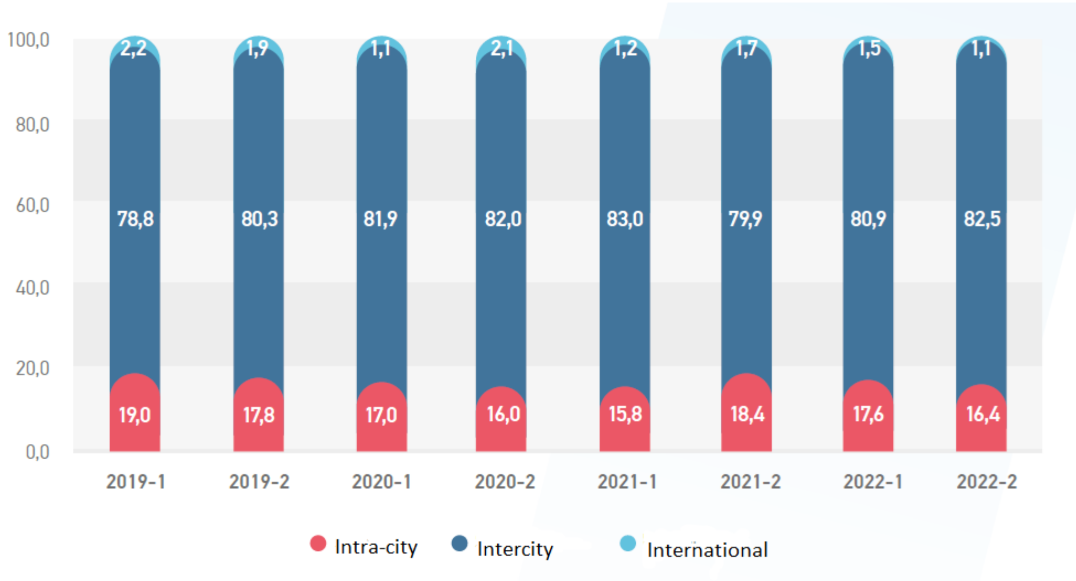

Figure 8: Distribution of Postal Parcel/Cargo Shipments According to the Delivery Locations on a Period Basis

More than 80 % of the postal parcel/cargo shipments are included in the intercity category. As with letter posts, the ratio of intercity shipment has an important place in postal parcel/cargo shipments.

In 2022, approximately 81.7 % of the total postal parcel/cargo shipments were intercity, while 17% comprised urban delivery shipments. The postal parcel/cargo rate sent abroad is around 1.3 %.

In 2022, the postal parcel/cargo delivery was the most important provinces, respectively, Istanbul, Ankara, Izmir, Bursa, and Antalya.

2.2.4. Delivery Times for Postal Parcel/Cargo Shipments

In recent years, with the growth of e-commerce and the increasing volume of postal parcel/cargo shipments, the issue of fast delivery has climbed to the top of users' expectations. The postal sector, which has been transitioning from a sender-focused approach to a recipient-focused approach, is shaping itself in line with user expectations, both globally and in Türkiye.

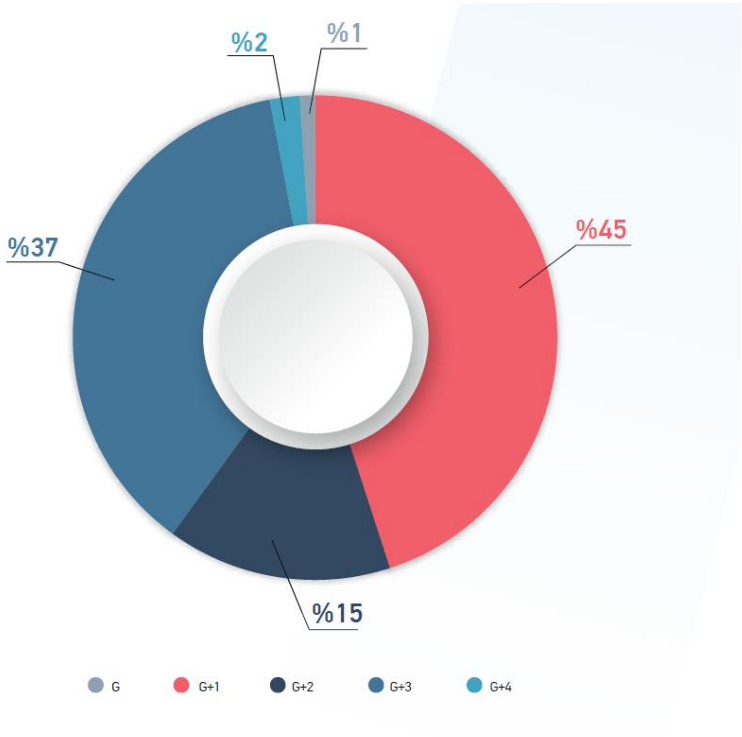

Figure 9: Distribution of Postal Shipments by Delivery Time

In this context, the distribution of postal shipments according to the delivery time is shown in Figure 9. In Türkiye, when the delivery periods of domestic postal shipments are examined, approximately 1 % of the shipments are delivered within the same day (on the day of accepted), while 60 % of the shipments are accepted within two days after the day.

2.2.5. Percentage Distribution of Postal Parcel/Cargo Shipments on the Basis of Postal Service Providers

As of the second half of 2022, in the postal parcel/cargo market, Aras Kargo has achieved the largest market share in terms of the number of shipments, handling 22.1% of the total postal parcel/cargo shipments. Following this company, Trendyol Express, and Yurtiçi Kargo rank second and third with shares of 21.6% and 13.4%, respectively. The percentage shares of postal service providers in this market are shown in Table 2.

Table 2:Percentage Distribution of Postal /Cargo Shipments by Postal Service Providers (%)

2019		2020		2021		2022-1		2022-2	
Yurtiçi	**29,9%**	Yurtiçi	**24,9%**	Yurtiçi	**25,5%**	Trendyol Express	**19,6%**	Aras Kargo	**22,1%**
Aras Kargo	**20,6%**	Aras Kargo	**24,2%**	Aras Kargo	**23,7%**	Yurtiçi	**19,2%**	Trendyol Express	**21,6%**
MNG	**14,3%**	PORT	**14,2%**	MNG	**13,8%**	Aras Kargo	**16,6%**	Yurtiçi	**13,4%**
PORT	**14,3%**	MNG	**13,4%**	PORT	**11,1%**	PORT	**16,1%**	PORT	**12,4%**
PTT	**9,6%**	PTT	**11,5%**	PTT	**9,4%**	MNG	**9,7%**	PTT	**8,1%**
UPS	**4,9%**	UPS	**3,9%**	Hepsijet	**7,1%**	PTT	**8,6%**	MNG	**7,6%**
Kuryenet	**2,7%**	Hepsijet	**3,3%**	UPS	**4,5%**	Hepsijet	**5,5%**	Hepsijet	**6,3%**
Hepsijet	**1,3%**	Kuryenet	**2,6%**	Kuryenet	**2,9%**	UPS	**2,9%**	UPS	**2,1%**
Other	**2,5%**	Other	**2,1%**	Other	**1,9%**	Other	**1,7%**	Other	**6,3%**

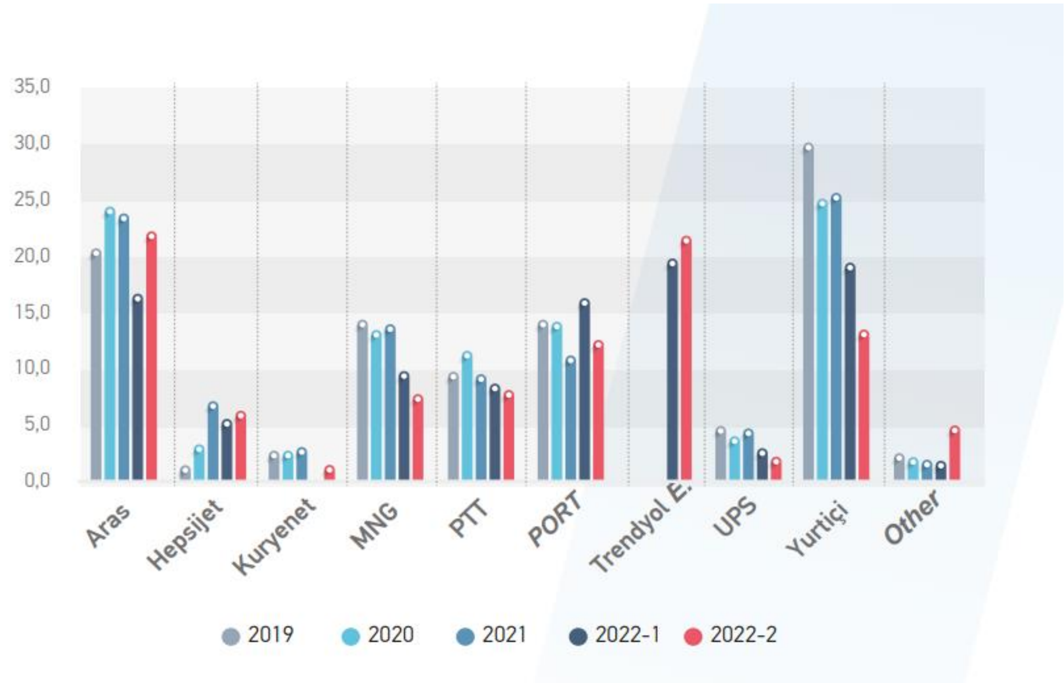

Figure 10: Change Trend on the Basis of Postal Service Providers of Postal Parcel/cargo Shipping Tracks, (%)

3. REVENUES IN THE POSTAL SECTOR

With the effect of the increase in e-commerce volume in recent years, shipment volumes have increased in the postal sector. Accordingly, a significant increase has been observed in service providers' revenues from postal services. Net sales revenues in the postal sector in 2022 increased by approximately 85% compared to the previous year and reached 33.6 billion ₺ in total. The distribution of net sales revenues in the postal sector by six-month periods is shown in Figure 11.

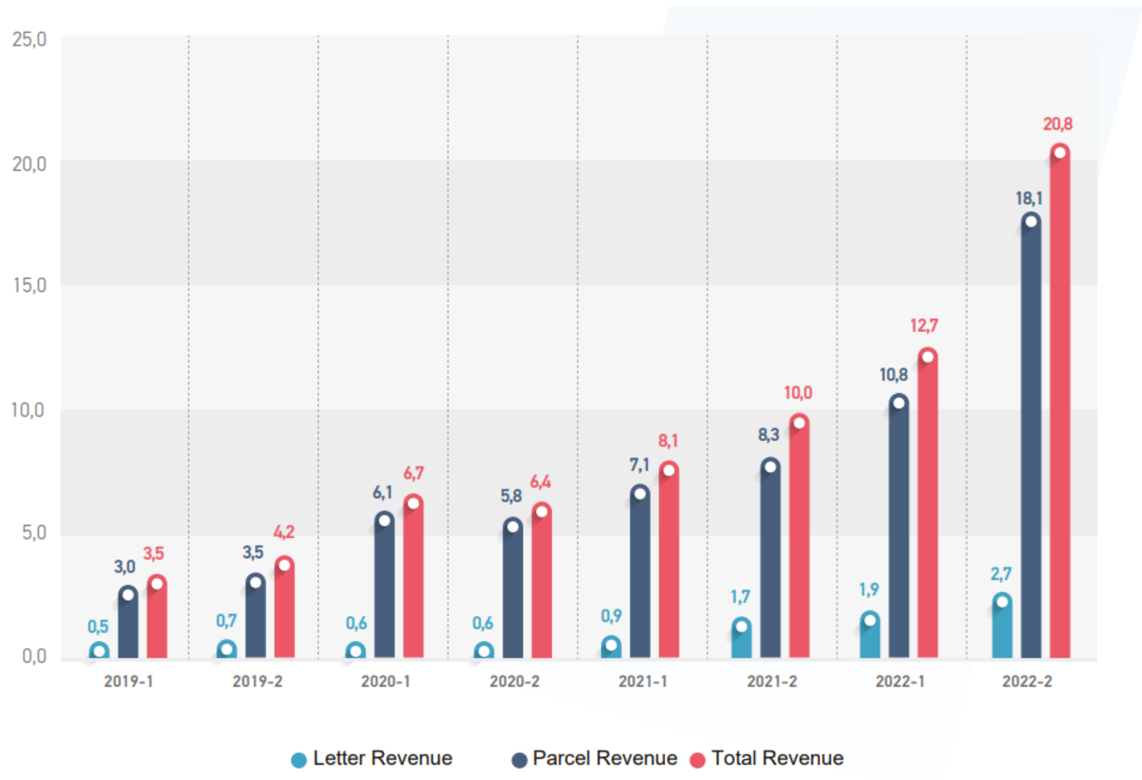

Figure 11: Revenues in the Postal Sector by Periods (Billion ₺)

On the other hand, the proportional distribution of total revenues generated in the relevant sector according to postal service providers in six-month periods is shown in Table 3. In 2022, PTT accounted for 19.3% of the total revenues generated from the postal sector, followed by Aras Kargo and Yurtiçi Kargo, with 14.5% and 16% market shares, respectively.

Table 3:Distribution of Total Revenues in the Postal Sector by Period (%)

2019		2020		2021		2022-1		2022-2	
PTT	**24,5%**	Yurtiçi	**21,6%**	PTT	**25,4%**	PTT	**20,9%**	PTT	**18,3%**
Yurtiçi	**20,7%**	Aras Kargo	**18,8%**	Yurtiçi	**19,2%**	Yurtiçi	**16,9%**	Aras Kargo	**16,3%**
Aras Kargo	**15,5%**	PTT	**17,4%**	Aras Kargo	**14,9%**	Aras Kargo	**11,7%**	Yurtiçi	**15,6%**
MNG	**9,3%**	MNG	**10,8%**	MNG	**9,5%**	PORT	**9,5%**	Trendyol Express	**10,4%**
PORT	**8,9%**	PORT	**9,3%**	DHL	**8,5%**	DHL	**9,3%**	PORT	**8,6%**
DHL	**6,8%**	DHL	**8,0%**	UPS	**7,9%**	Trendyol Express	**8,7%**	DHL	**6,9%**
UPS	**6,3%**	UPS	**5,9%**	PORT	**6,0%**	UPS	**8,3%**	MNG	**6,8%**
TNT	**3,8%**	TNT	**3,9%**	TNT	**3,4%**	MNG	**7,7%**	UPS	**4,8%**
Kuryenet	**1,5%**	DFAST	**1,7%**	DFAST	**2,8%**	Hepsijet	**2,6%**	TNT	**3,9%**
Aramex	**1,3%**	Kuryenet	**1,5%**	Kuryenet	**1,3%**	TNT	**2,6%**	Hepsijet	**3,3%**
Other	**1,5%**	Other	**1,2%**	Other	**1,2%**	Other	**1,8%**	Other	**5,2%**

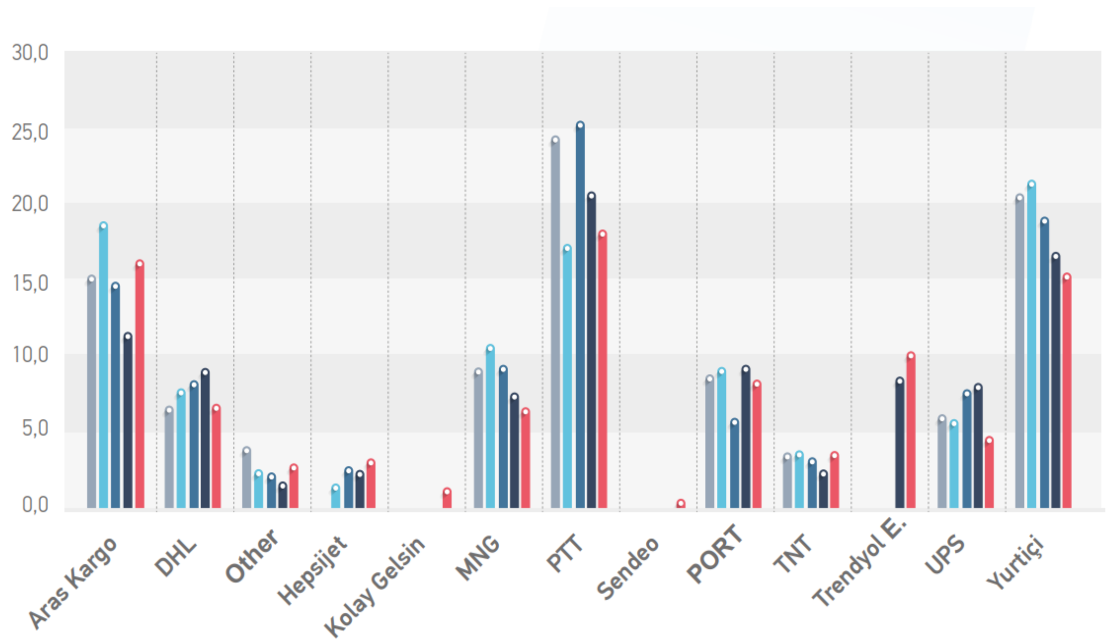

Figure 12:The Change Trend of Total Revenues in the Postal Sector by Postal Service Provider, (%)

3.1 Letter Post Revenues

In 2022, approximately 4.6 billion ₺ revenue was generated from letter posts. Compared to 2021, the revenue from letter posts has increased by approximately 73%. The distribution of revenues from letter posts in six-month periods is shown in Figure 13.

Figure 13:Letter Post Revenues by Period, (Million ₺)

3.1.1 Distribution of Letter Post Revenues by Place of Delivery

Letter posts are categorized into three categories as “intra-city,” “inter-city,” and “international,” and the most significant revenue was generated from inter-city letter posts. Figure 14 shows the distribution of revenues from letter posts by period. In 2022, approximately 81.5% of the revenue from letter posts was generated from intercity and approximately 12.9% from intracity.

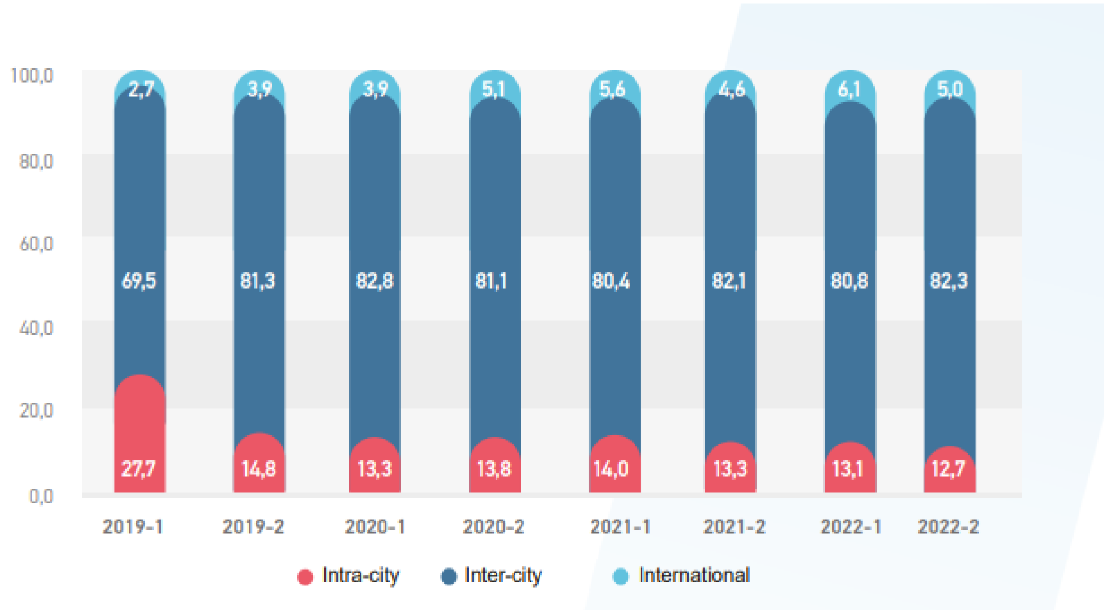

Figure 14:Distribution of Letter Post Revenues by Delivery Place (Revenue Based, %)

3.2 Postal Parcel/Cargo Revenues

In 2022, approximately 28.9 billion ₺ revenue was generated from postal shipments. The distribution of postal parcel/cargo revenues by period is shown in Figure 15.

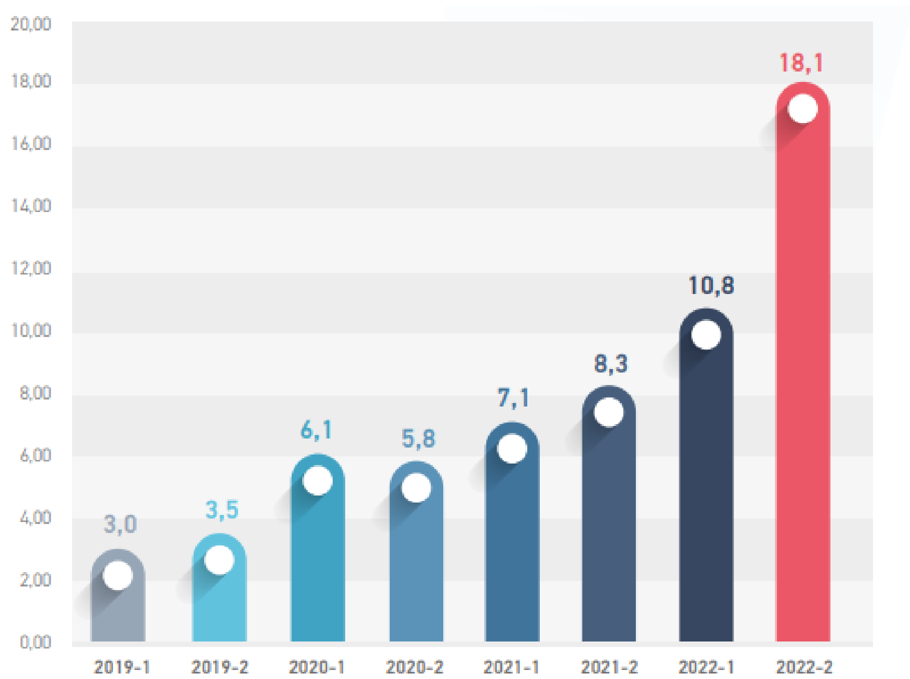

Figure 15:Postal Parcel/Cargo Revenues by Periods

Accordingly, the revenue, which was 6.5 billion ₺ in 2019, increased approximately 4.4 times to 28.9 billion ₺ by the end of 2022. On the other hand, Table 4 shows the distribution of revenues from postal parcel/cargo shipments among postal service providers in six-month periods. Aras Kargo was the postal service provider generating the highest revenue from parcel/cargo shipments in the relevant periods. As of the second half of 2022, Aras Kargo was the leader with a market share of 18.7%, followed by Yurtiçi Kargo and Trendyol, with market shares of 17.9% and 12%, respectively.

Table 4:Distribution of Postal Parcel/Cargo Revenues by Service Providers (%)

2019		2020		2021		2022-1		2022-2	
Yurtiçi	**24,9%**	Yurtiçi	**23,8%**	Yurtiçi	**23,8%**	Yurtiçi	**19,9%**	Aras Kargo	**18,7%**
Aras Kargo	**18,7%**	Aras Kargo	**20,7%**	Aras Kargo	**18,5%**	Aras Kargo	**13,8%**	Yurtiçi	**17,9%**
MNG	**11,1%**	MNG	**11,9%**	MNG	**11,8%**	PORT	**11,1%**	Trendyol Express	**12,0%**
PORT	**10,7%**	PORT	**10,2%**	DHL	**10,5%**	DHL	**10,9%**	PORT	**9,9%**
PTT	**9,3%**	PTT	**8,9%**	UPS	**9,7%**	Trendyol Express	**10,3%**	DHL	**7,9%**
DHL	**8,2%**	DHL	**8,8%**	PTT	**7,7%**	UPS	**9,8%**	MNG	**7,8%**
UPS	**7,5%**	UPS	**6,5%**	PORT	**7,4%**	MNG	**9,1%**	PTT	**6,2%**
TNT	**4,5%**	TNT	**4,3%**	TNT	**4,2%**	PTT	**7,0%**	UPS	**5,5%**
Kuryenet	**1,8%**	Hepsijet	**1,8%**	Hepsijet	**3,4%**	Hepsijet	**3,0%**	TNT	**4,4%**
Aramex	**1,6%**	Kuryenet	**1,6%**	Kuryenet	**1,6%**	TNT	**3,0%**	Hepsijet	**3,8%**
Other	**1,8%**	Other	**1,3%**	Other	**1,4%**	Other	**2,1%**	Other	**6,0%**

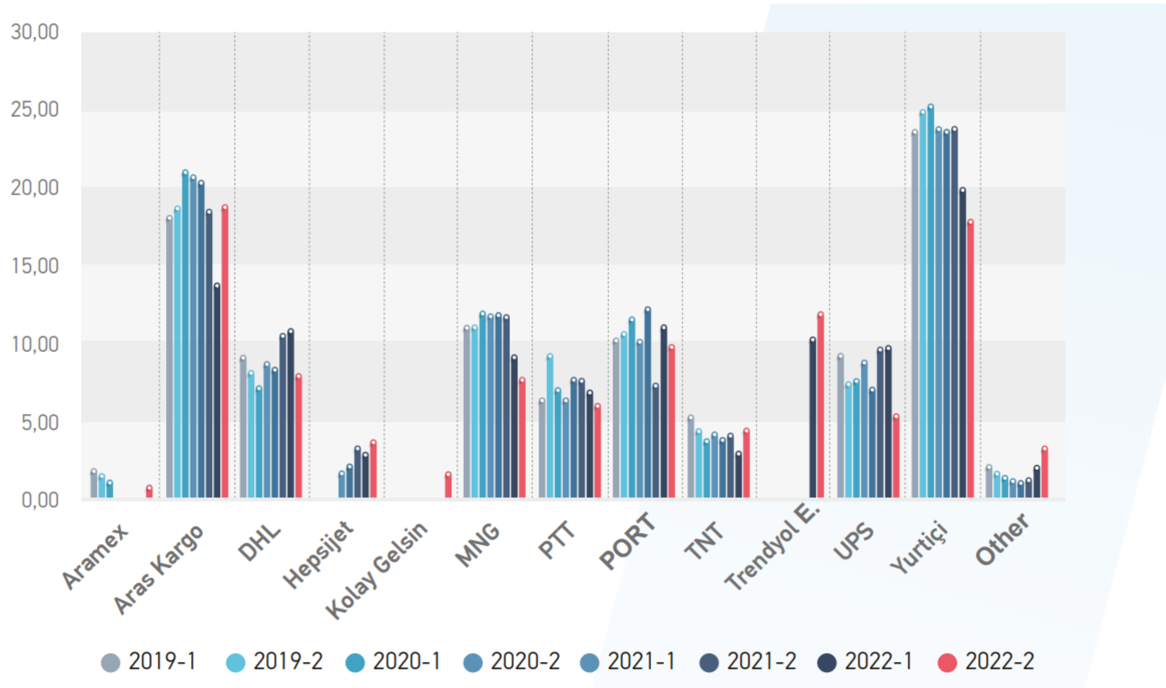

Figure 16:Change Trend of Postal Parcel/Cargo Revenues by Period of Postal Service Provider, (%)

3.2.1 Distribution of Postal Parcel/Cargo Revenues by Place of Delivery

Postal shipments are divided into three categories: intra-city, inter-city, and international, according to their place of delivery, and the enormous income was generated from intercity postal parcels/cargoes. Figure 17 shows the distribution of revenues from postal parcels/cargo by periods. It is seen that 65% of postal parcels/cargo in 2022 consist of intercity shipments.

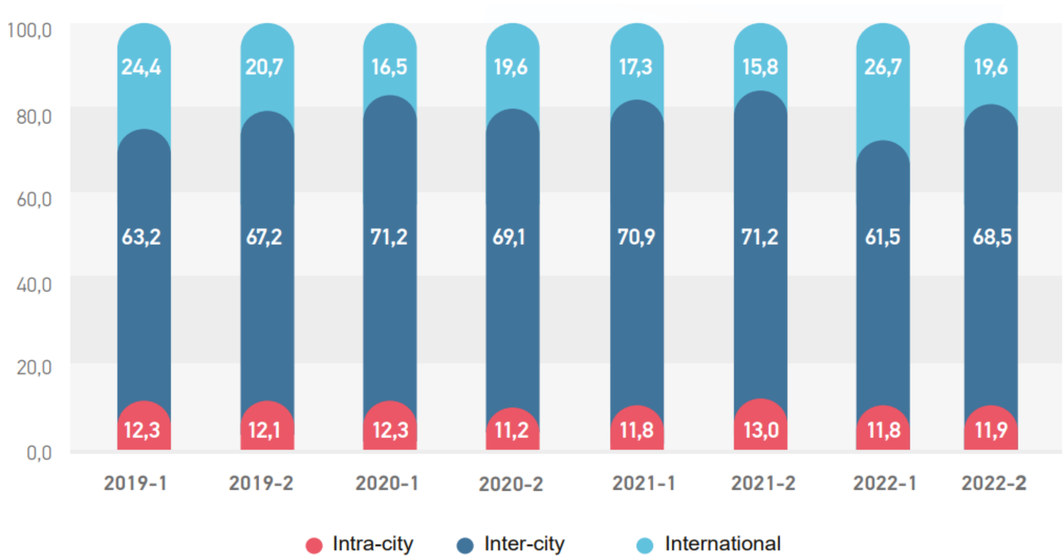

Figure 17:Distribution of Postal Revenues by Periods by Delivery Locations, (%)

4. UNIVERSAL SERVICE PROVIDER (USP) MARKET SHARE ANALYSIS

4.1 Share of the Universal Service Provider in Postal Parcel/Cargo Shipments

In 2022, approximately 8.3% of postal parcels/cargoes were sent via USP. Figure 18 shows the market share of USP in postal parcel/cargo shipments.

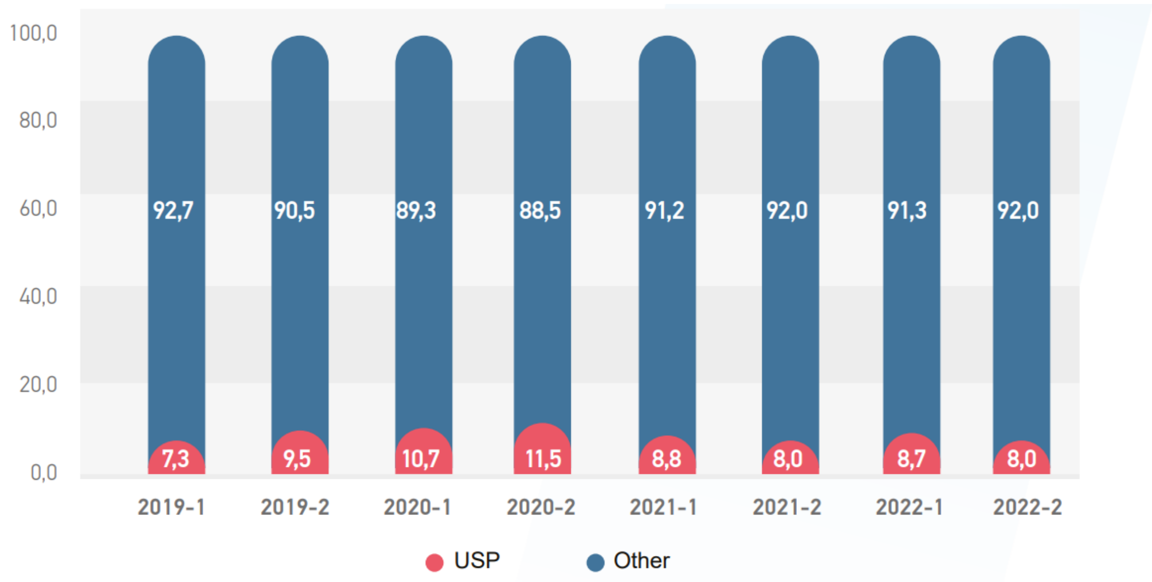

Figure 18:USP Share in Postal Parcel/Cargo Shipments (Unit Based, %)

In addition, in 2022, around 6.5% of postal parcel/cargo revenues were generated by USP. Figure 19 shows the share of USP in postal parcel/cargo revenues.[3]

[3] Universal postal service within the scope of the Postal Services Law No. 6475; It is defined as “providing a postal service uninterruptedly at affordable rates for all users within the borders of the country, regardless of geographical area, within the framework of determined principles and rules”; Universal postal service provider, on the other hand, is defined as "the service provider authorized to carry out the universal postal service in accordance with the authorization document". In Türkiye, the obligation of universal postal service has been determined as the Post and Telegraph Organization Joint Stock Company.

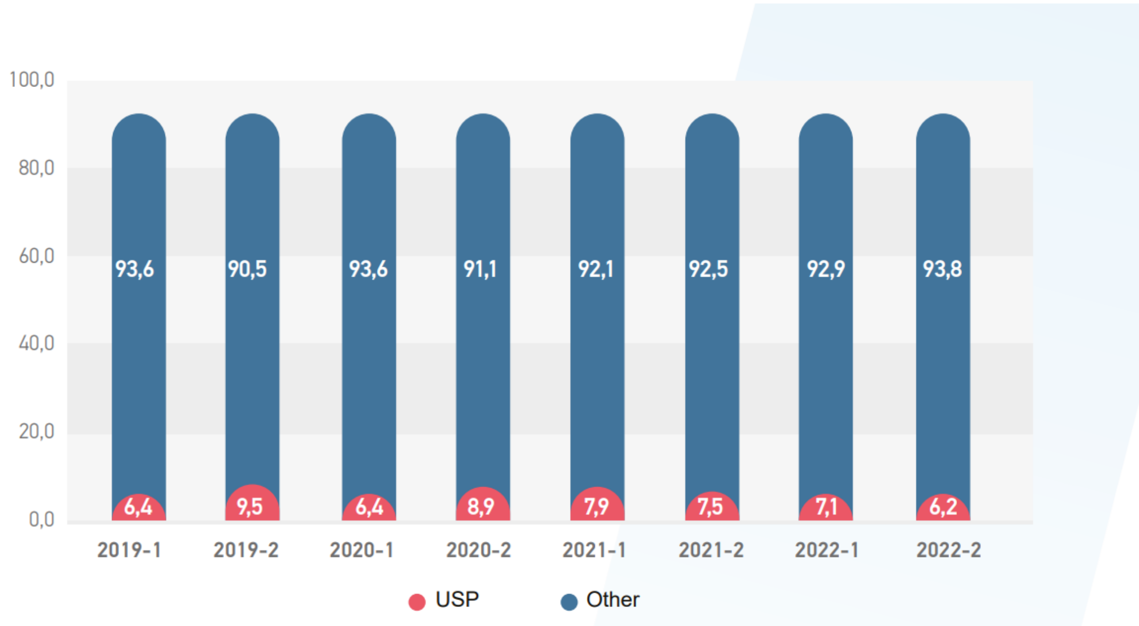

Figure 19:USP Share in Postal Parcel/Cargo Revenues, (%)

4.2 Share of USP in the Number of Branches/Agencies

As of the end of 2022, there are 9,546 postal branches/agencies in Turkey, and approximately 41.2% of these units belong to USP. The share of USP in the number of postal branches/agencies in Türkiye has shown a balanced distribution over the years. This situation is shown in Figure 20.

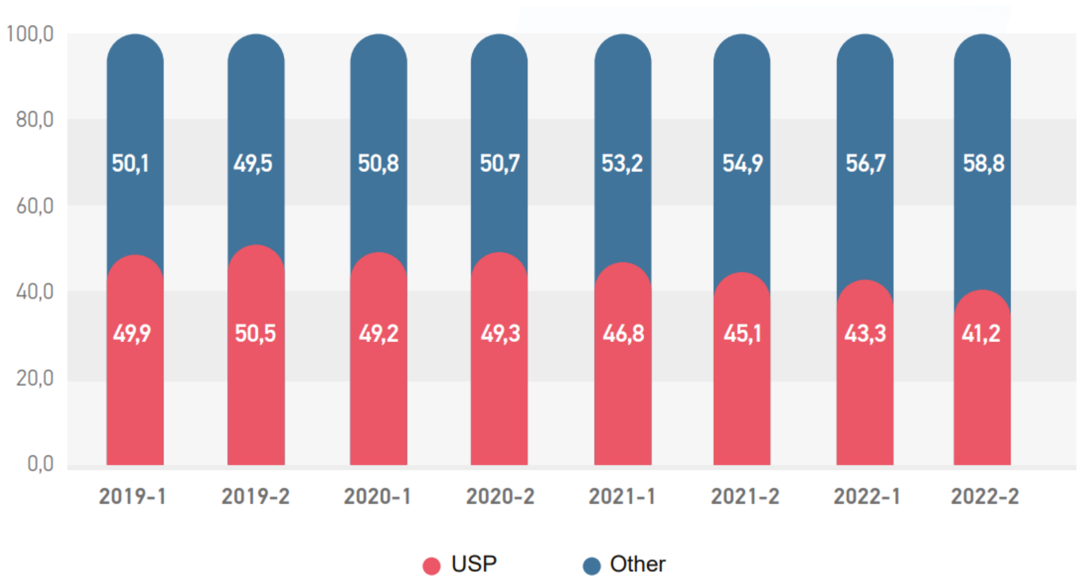

Figure 20: USP's Postal Branch/Agency Ratio, (%)

4.3 Share of USP in Employment

As of the end of 2022, the postal sector employs a workforce of 96,397 employees. USP provides approximately 41.6% of the current employment. Figure 21 shows the distribution of the share of USP in employment in six-month periods.

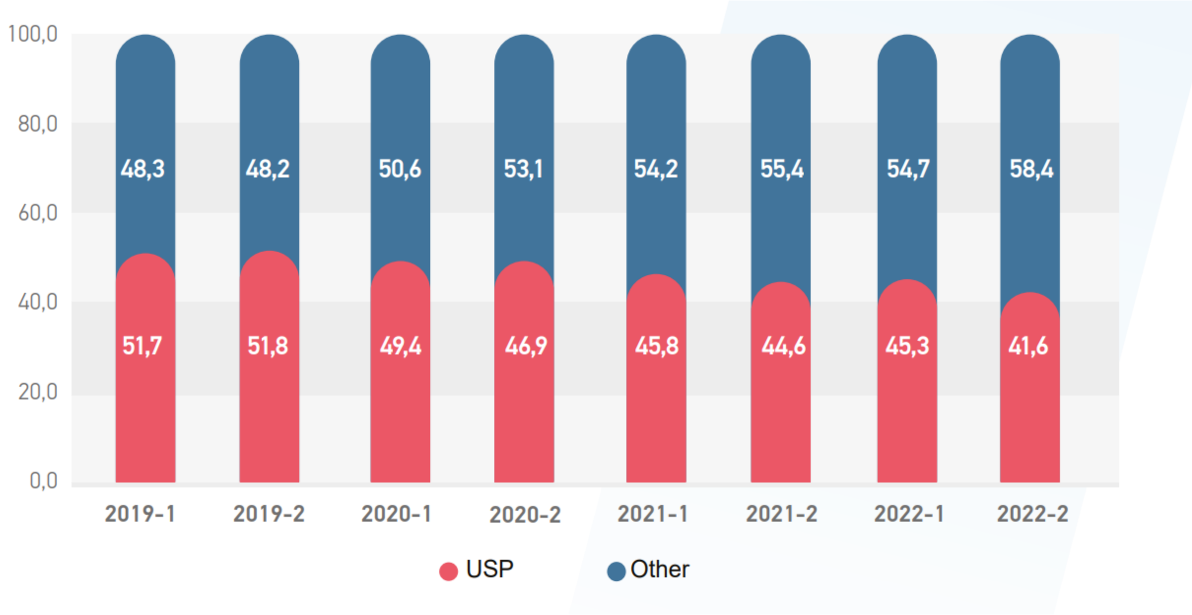

Figure 21:Share of USP in Employment, (%)

5. EMPLOYMENT IN THE POSTAL SECTOR

While the number of personnel working in the sector was 83,857 at the end of 2019, this number increased by approximately 15% and reached 96,397 at the end of 2022. The figure below shows the change in the number of personnel employed by service providers operating in the postal sector in Turkey over the years.

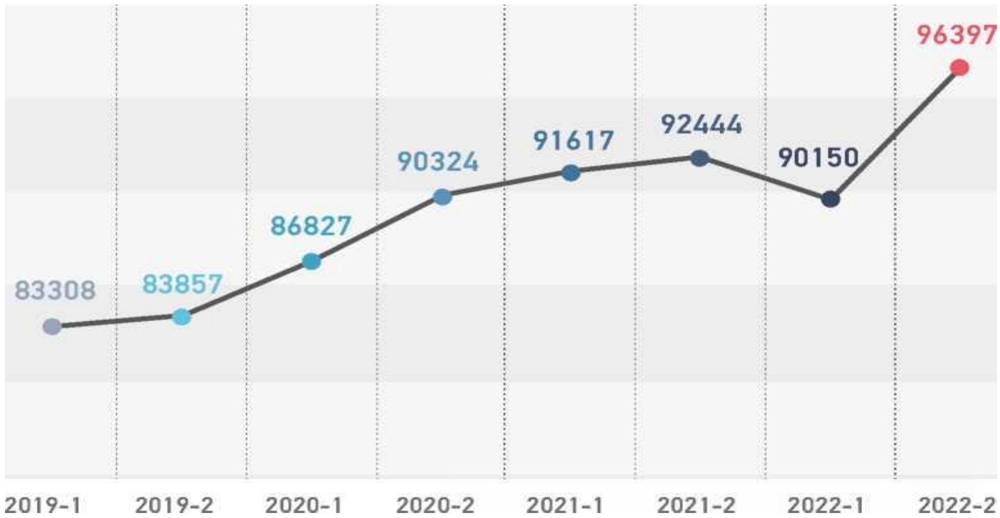

Figure 22:Total Employment Numbers in the Postal Industry (2019-2022)

The distribution of the number of personnel of postal service providers by the end of 2022 is given below.

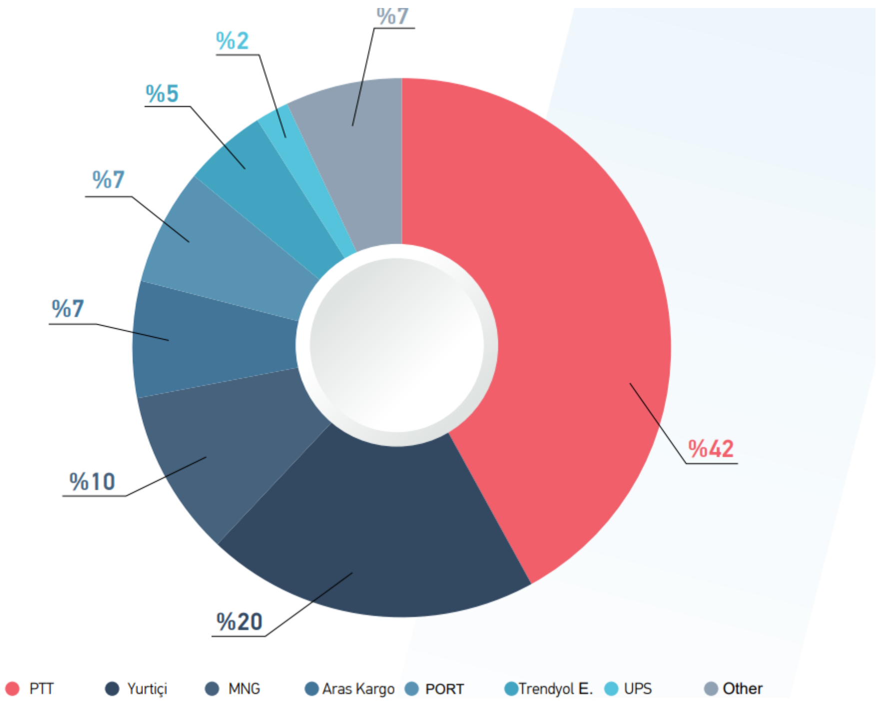

Figure 23: Employment Percentages of Service Providers (2022)

According to Figure 22, PTT employs 42% of the total personnel working in the postal sector as of 2022. PTT, which provides universal postal service throughout the country, is followed by Yurtiçi Kargo and MNG with 20% and 10% shares, respectively.

6. INVESTMENT IN THE POSTAL SECTOR

The postal sector in our country has gained significant momentum in recent years. With the increase in postal traffic, the budget allocated by service providers for investment has also increased in order to respond to this demand. In 2019, the total investment made by postal service providers in the sector was around 880 million ₺, while this figure exceeded 2,673 million ₺ in 2022.

Figure 24:Total Investment Amount in the Postal Industry (Million ₺)

The distribution of investments in the sector by PSPs by periods is shown in the graph below.

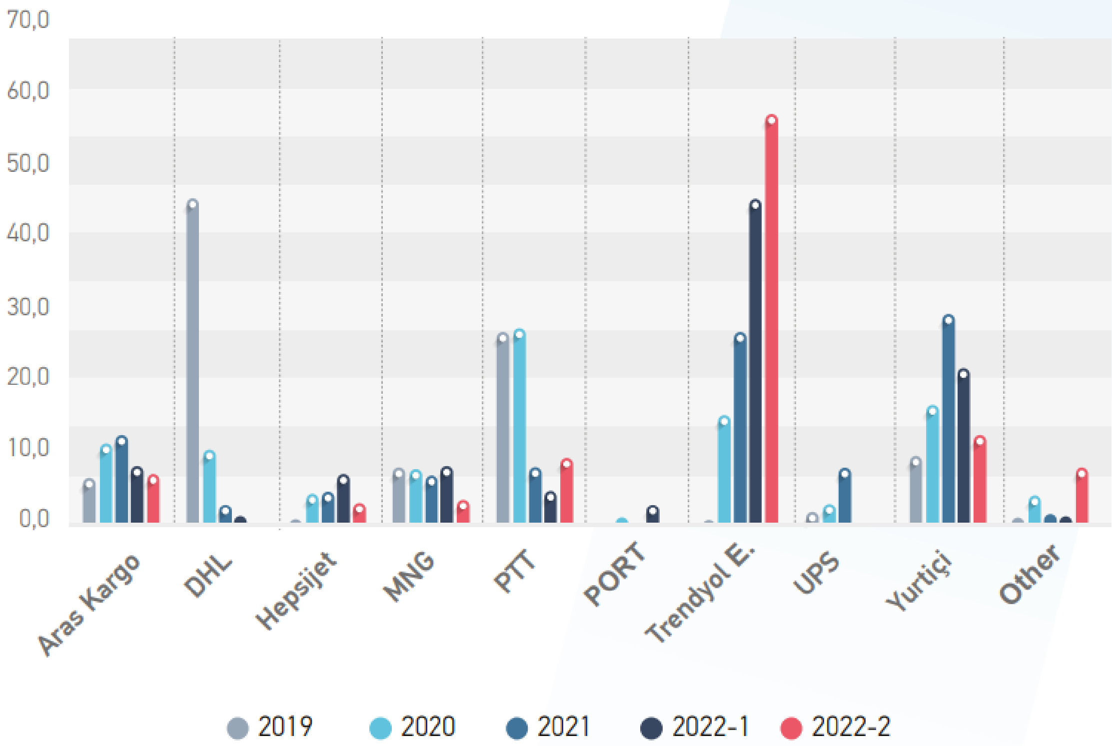

Figure 25:Distribution of Investments Made in the Postal Sector by Postal Service Provider(PSP) by Periods, (%)

As can be seen from Figure 25, 51.5% of the investments made in 2022 were made by Trendyol Express. Yurtiçi Kargo and Aras follow Trendyol Express with 17.1% and 7.4% shares, respectively.

7. CONSUMER COMPLAINTS IN THE POSTAL SECTOR

The number of complaints made to BTK through the Presidency's Communication Center (CIMER) and individual petitions is shown in Figure 26. In March 2020, with the Covid pandemic, there was an increase in the number of complaints due to the rapid growth in e-commerce shipments, but it is seen that the number of complaints has become compatible with the previous data over time.

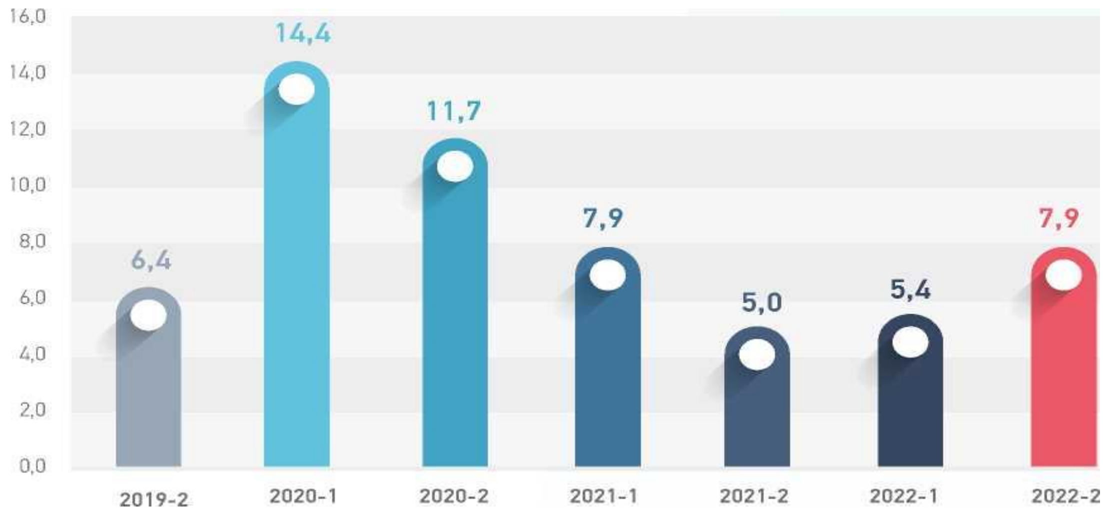

Figure 26: Number of Complaints Collected by BTK (Thousand)[4]

In 2022, when the distribution of complaints is analyzed, the number of branch/agency/personnel complaints ranked first among the applications received by BTK with 6150, while the number of complaints regarding late delivery ranked second with 2229.

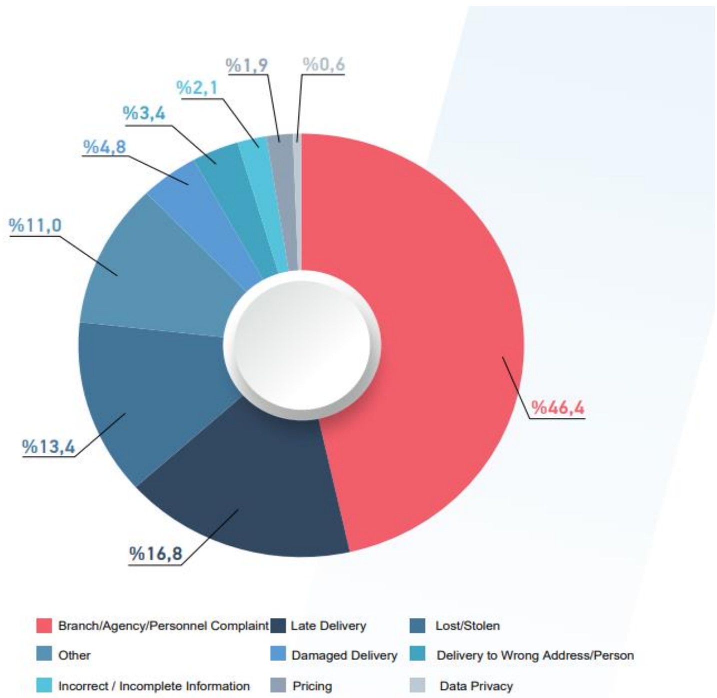

Figure 27: Distribution of Complaints Received by BTK in 2022 by Category, (%)

[4] The consumer complaint system regarding postal services has been put into service as of 2019-2.

ABBREVIATIONS

• Aras Kargo Yurt İçi Yurt Dışı Taşımacılık Anonim Şirketi:	**Aras Kargo (Aras)**
• Aramex International Hava Kargo Ve Kurye Anonim Şirketi:	**Aramex**
• DHL Worldwide Express Taşımacılık ve Ticaret Anonim Şirketi:	**DHL**
• D FAST Dağıtım Hizmetleri ve Lojistik Anonim Şirketi:	**D Fast (Hepsijet)**
• AGT Kurye Hizmetleri Anonim Şirketi:	**AGT Kurye (AGT)**
• DMD Kurye Toplu Dağıtım Hizmetleri Ticaret Limited Şirketi:	**DMD Kurye (DMD)**
• Doğan Kurye Toplu Dağıtım Hizmetleri Ticaret Limited Şirketi:	**Doğan Kurye (Doğan)**
• Durupost Kurumsal Hizmetler Ticaret Limited Şirketi:	**Durupost**
• İnter Global Kargo Lojistik Ve Taşımacılık Ticaret Anonim Şirketi:	**IGC**
• Jetizz Hızlı Taşımacılık Anonim Şirketi:	**Jetizz**
• Ekol Ekspres Kargo Anonim Şirketi:	**Kolay Gelsin**
• Kurye Net Motorlu Kuryecilik Ve Dağıtım Hizmetleri Anonim Şirketi:	**Kuryenet**
• MNG Kargo Yurtiçi Ve Yurtdışı Taşımacılık Anonim Şirketi:	**MNG Kargo (MNG)**
• Paket Taşımacılık Sistemleri A.Ş.:	**PTS**
• Posta ve Telgraf Teşkilatı Anonim Şirketi:	**PTT**
• Sendeo Dağıtım Hizmetleri Anonim Şirketi:	**Sendeo**
• Port Kargo ve Lojistik Anonim Şirketi:	**PORT (Sürat)**
• Telekurye Dağıtım ve Kurye Hizmetleri Anonim Şirketi:	**Telekurye**
• Fedex Express Turkey Taşımacılık Ve Ticaret Limited Şirketi:	**Fedex (TNT)**
• Trendyol Lojistik Anonim Şirketi:	**Trendyol Ekspress (Trendyol)**
• UPS Hızlı Kargo Taşımacılığı Anonim Şirketi:	**UPS**
• Yurt İçi Kargo Servisi Anonim Şirketi:	**Yurtiçi Kargo (Yurtiçi)**