

Parcel Lockers in Sweden: Market trends, policy review and challenges

Yulia Vakulenko

Lund University, Sweden

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Yulia Vakulneko

PhD, Packaging Logistics

Lund University, Sweden

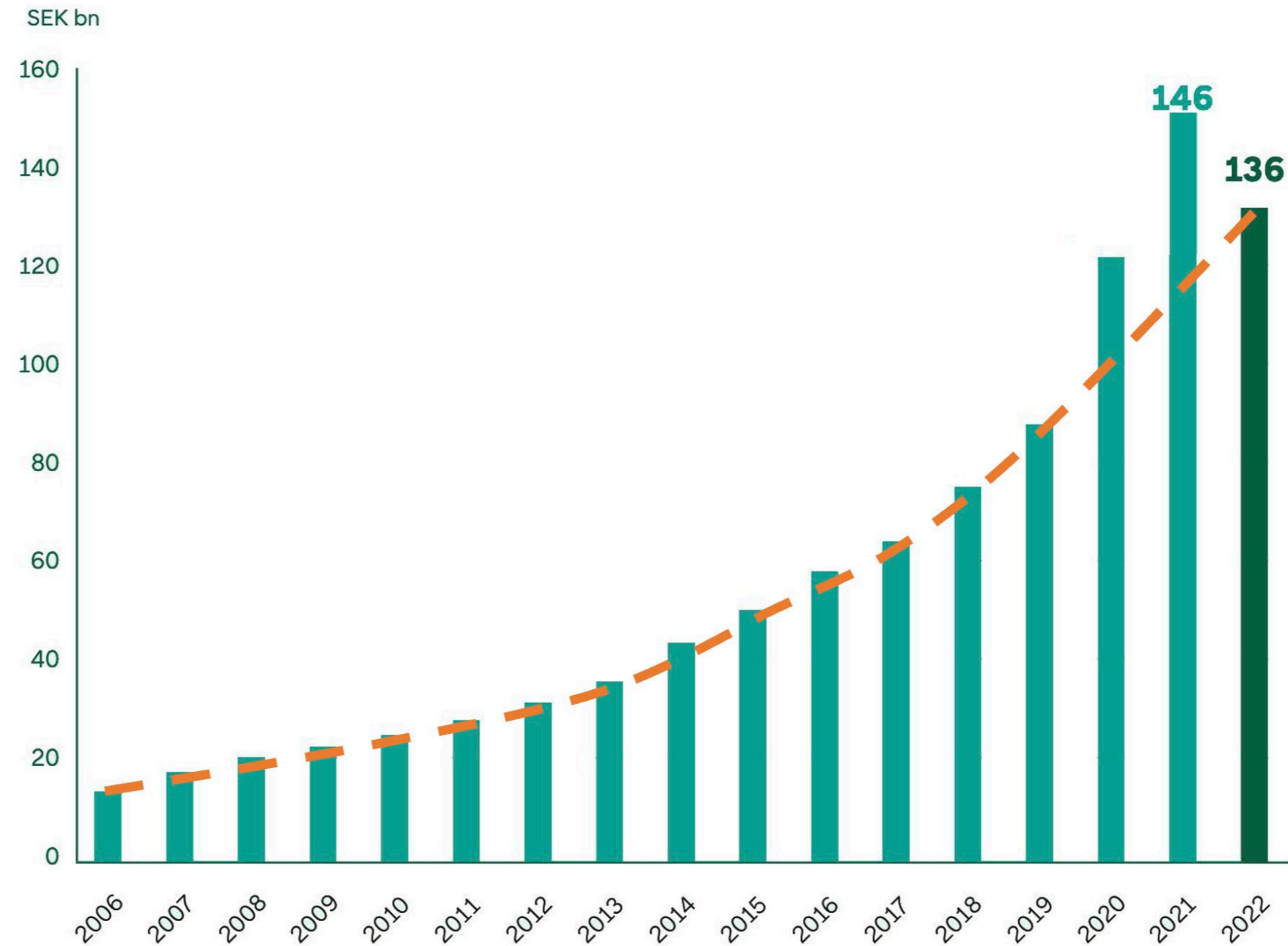
+46 722 32 4408

yulia.vakulenko@plog.lth.se



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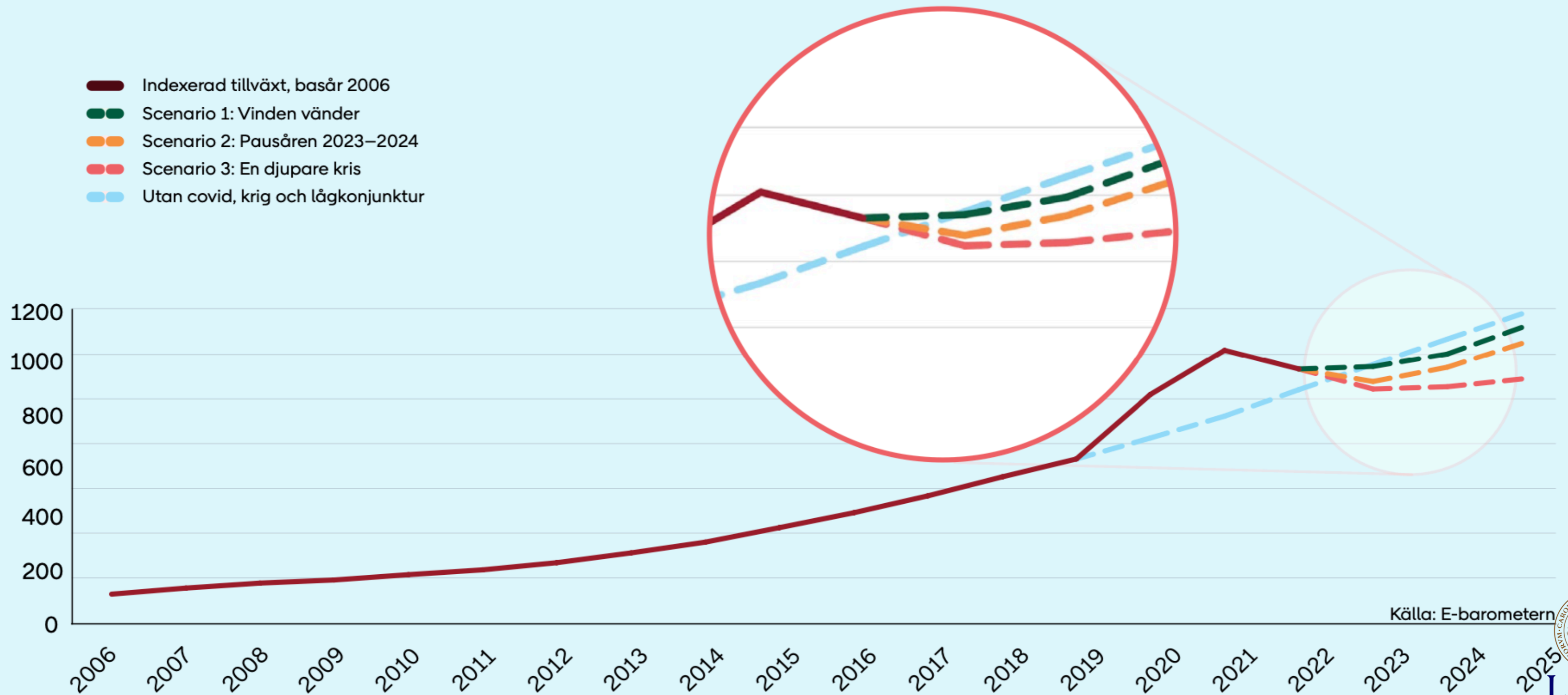
Sweden's E-commerce market



E-commerce net sales in Sweden (SEK bln)
Source: PostNord & HUI Research, E-barometern 2022



Sweden's E-commerce market



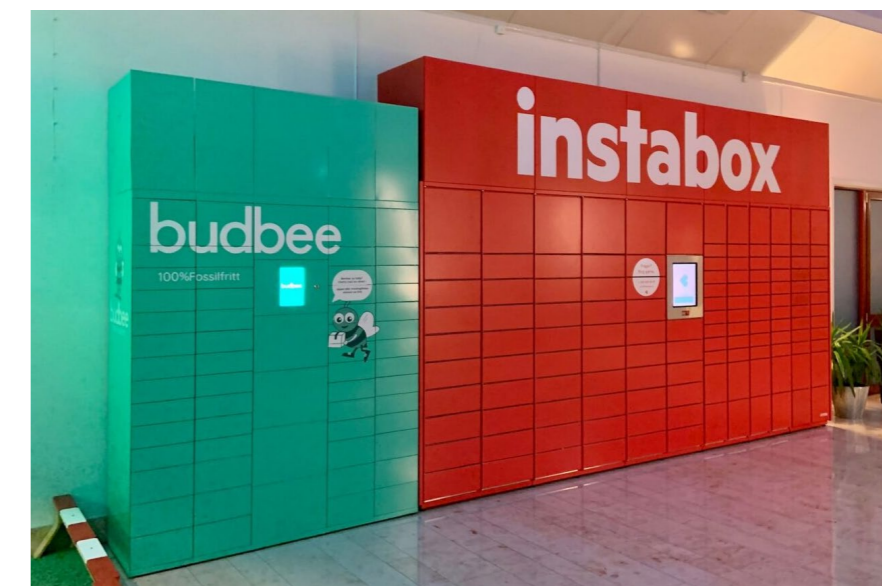
Källa: E-barometern



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Sweden's E-commerce market

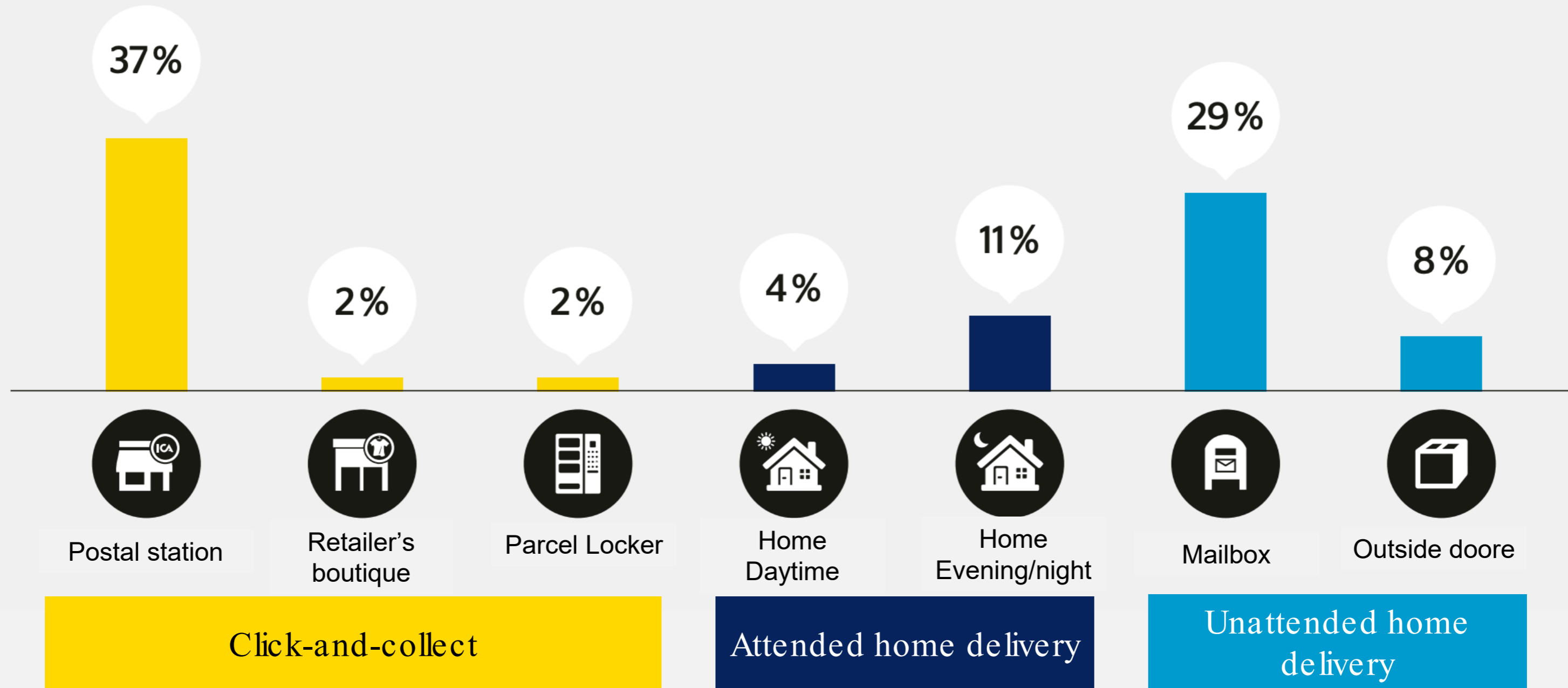
- **Adult population shopping online: 7.6 M (96%)**
- **Average spending consumer/year: 1932 €**
- **E-commerce sales: 2022 – EUR 12.5B / 2027 - EUR 19.3B**
- **Av. delivery speed: 1-3 days in Sweden, 2-6 days in Europe**
- **Dwell time: 7-14 days**
- **Delivery cost for S/M parcels: 0 – 6 €**
- **Slipper distance: 350-400m**
- **Strong sustainability (green) agenda**



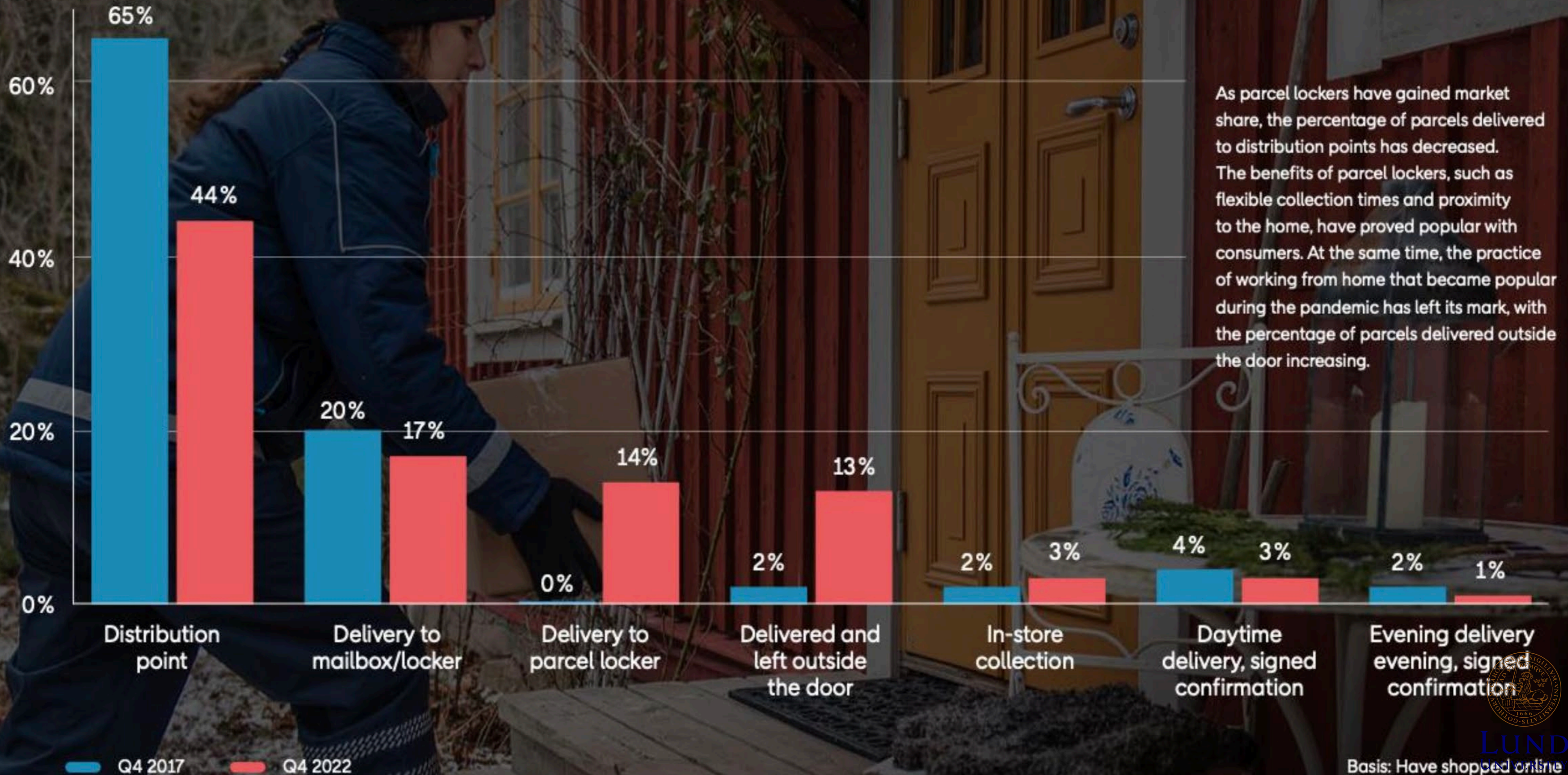
Parcel locker deliveries



Delivery methods: consumer preferences 2015



How consumers' most recent e-commerce purchases were delivered



As parcel lockers have gained market share, the percentage of parcels delivered to distribution points has decreased. The benefits of parcel lockers, such as flexible collection times and proximity to the home, have proved popular with consumers. At the same time, the practice of working from home that became popular during the pandemic has left its mark, with the percentage of parcels delivered outside the door increasing.

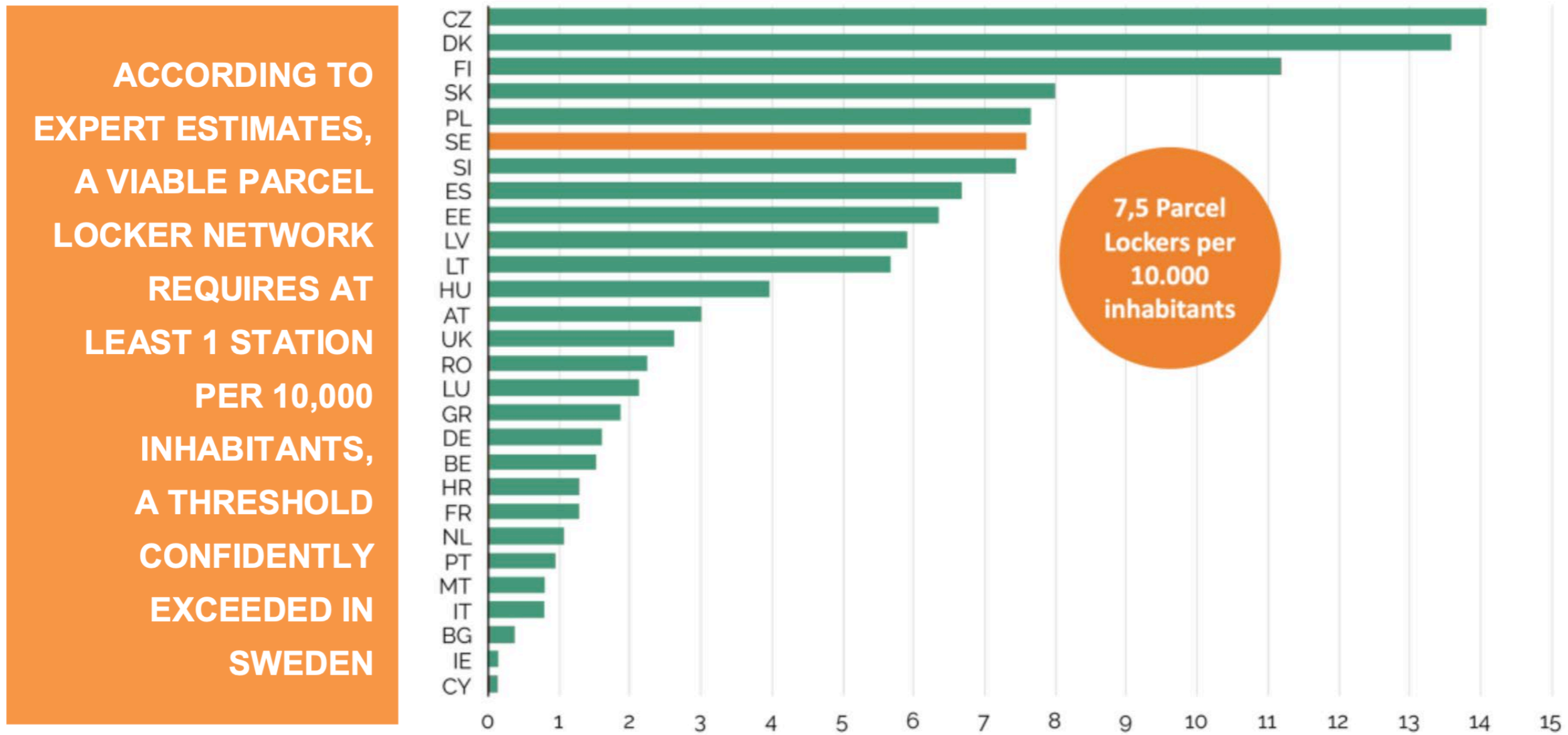


How are parcels delivered OOH?

Logistics Operator	Postal Offices	Parcel Lockers
POSTNORD	2,300	4,200
INSTABEE (Instabox & Budbee)	1,000	1,700
IBOXEN		1,400
DHL	1,600	120
BRING	1,712	68
DB SCHENKER	1,600	
DPD	2,014	849
UPS	618	
TOTAL	10,844	8,337



How are parcels delivered OOH?



Number of Parcel Lockers per 10,000 inhabitants Source: Last Mile Experts, OOH Delivery in Europe 2023



Research purpose

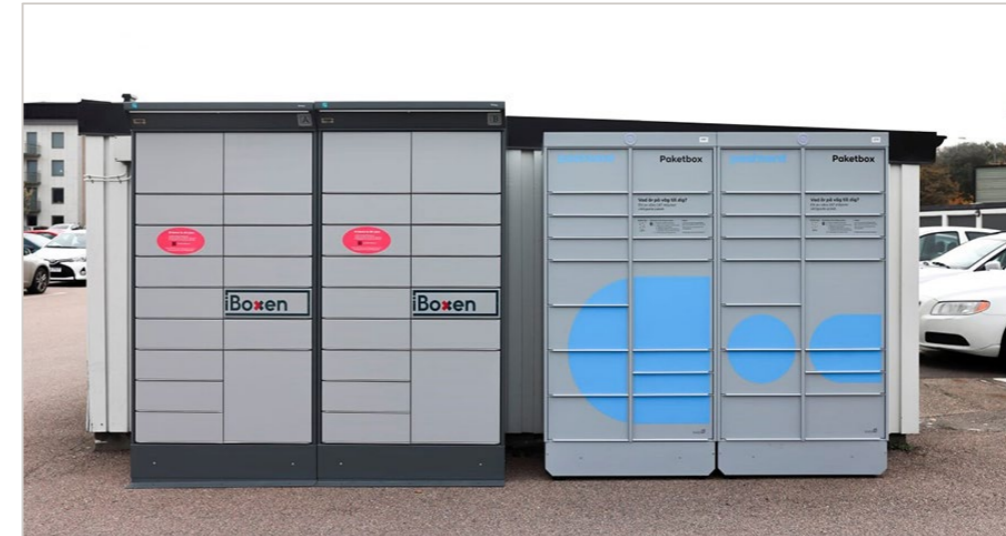
... to advance the knowledge for parcel
locker network development from a policy
perspective.



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Case Analysis: Stockholm Pilot



“There is a shortage of space on the streets and squares, so we should only have such things that we need to have space for, and that contribute to the city feeling accessible and safe and welcoming and approachable” –

Stockholm City



Stakeholder Analysis



Stakeholder Analysis

“Wherever our customers (e-retailers) want it (deliveries), and where the end consumer wants it – that’s where we gonna be”

PostNord

“From the city’s point of view, it (parcel locker) is an interesting infrastructure, and definitely has a role to fill in the city, but I’m not quite sure they (companies) have found the right way for that yet”

Trafikkontoret, Stockholms stad

“Economy, environment, and social development is the essence (to parcel locker placement)”

Halmstads Fastighets



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Stakeholder Analysis



LSPs & PL providers

E-retailers

Land owners

Policy makers



Stakeholder Analysis



LSPs & PL providers

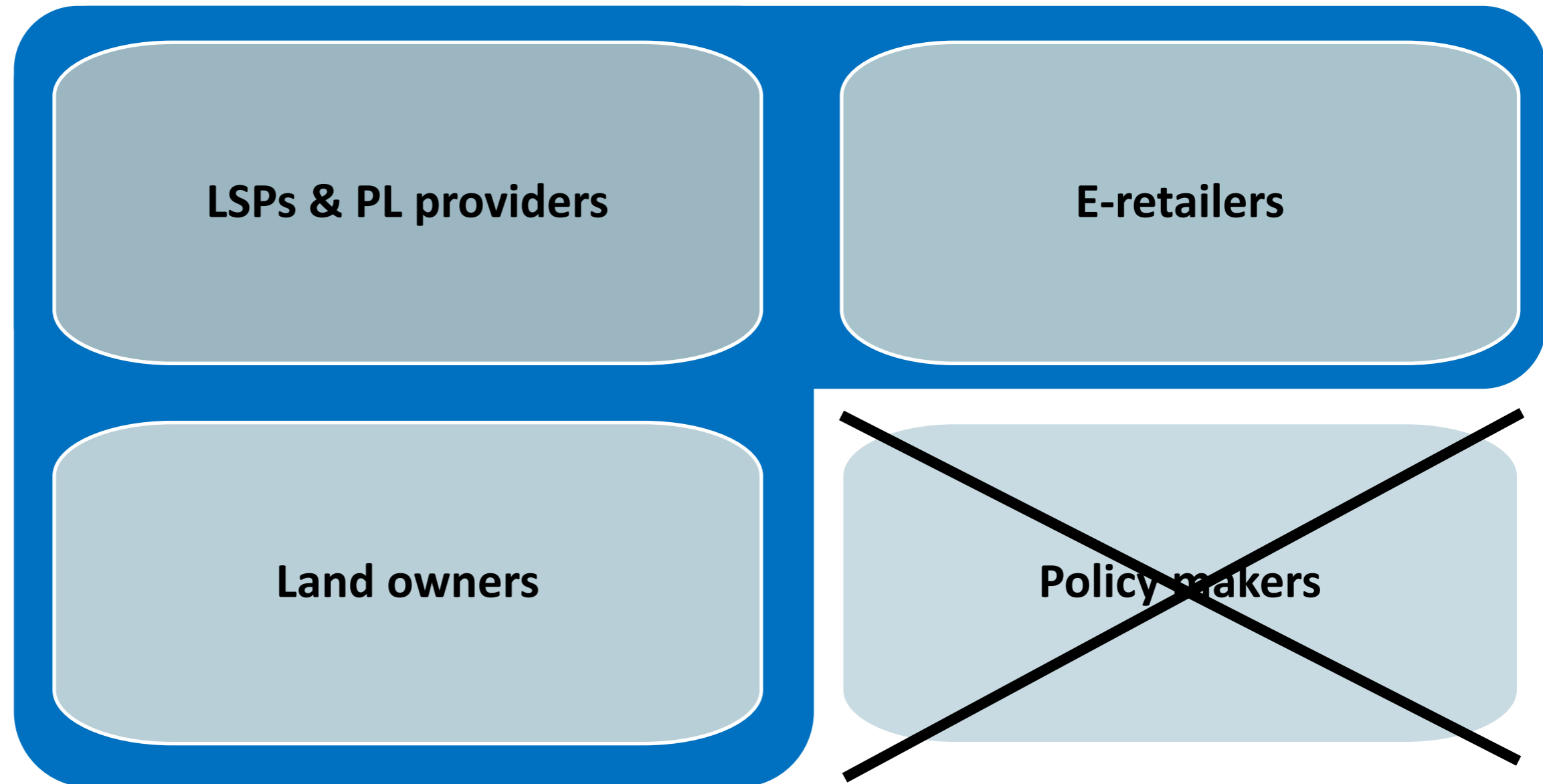
E-retailers

Land owners

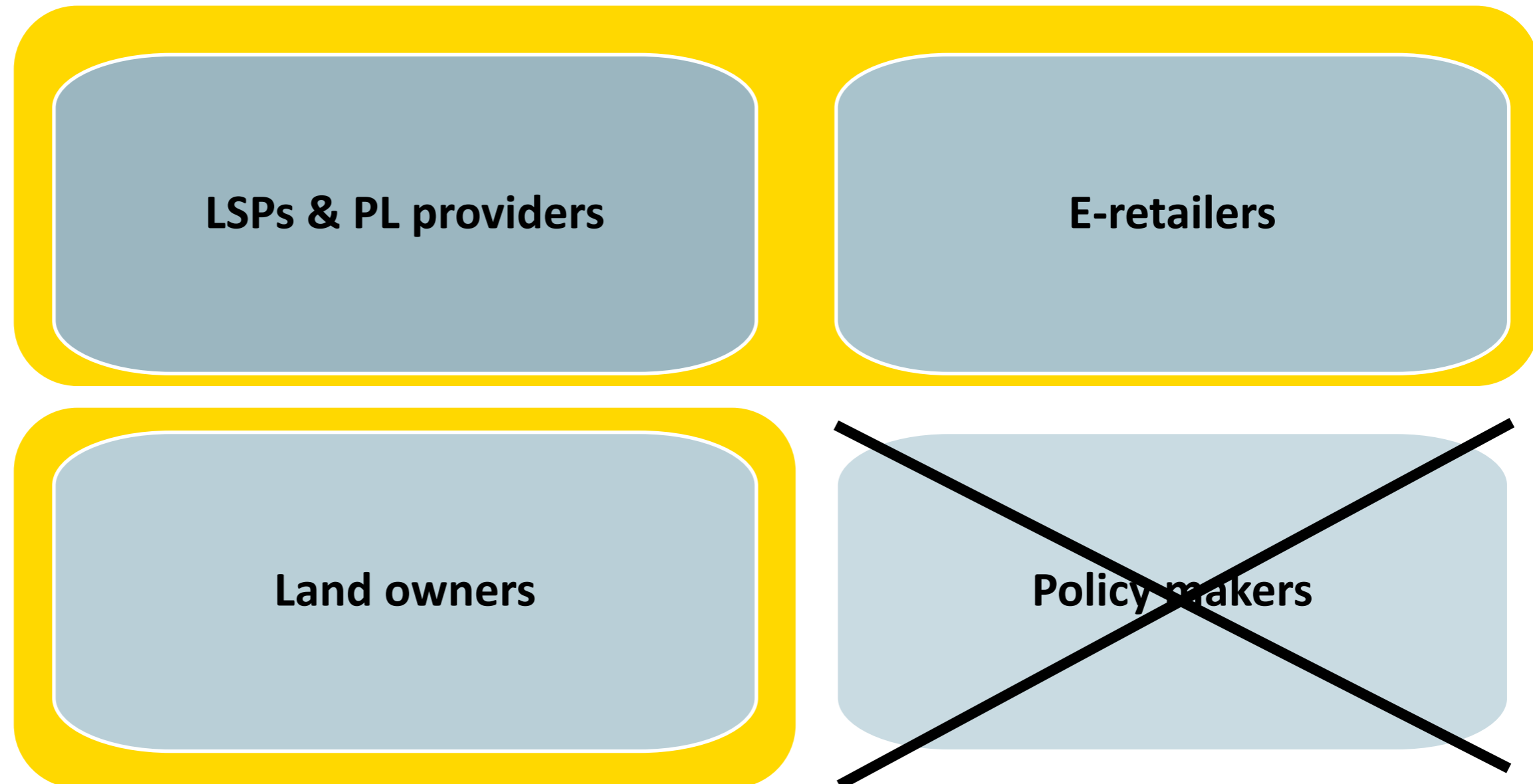
Policy makers



Stakeholder Analysis



Stakeholder Analysis





Recommendations

Incentiveze and promote systematic data collection and sharing

Incentiveze and promote environmentally-driven parcel locker network design

Incentiveze and promote consolidation

System approach in policy development





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