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## BELGIAN INSTITUTE FOR POSTAL SERVICES AND TELECOMMUNICATIONS

**B I P T**

*PRESS RELEASE*

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### **BIPT publishes a study on the Belgian market for parcel delivery in the context of e-commerce activities**

**Brussels, 14 June 2017 – Because of the increasing importance of e-commerce BIPT wants to gain more insight into the parcel sector in the context of e-commerce. At the request of BIPT KPMG has mapped out what obstacles hinder the development of the e-commerce sector. The study, presented to the stakeholders, makes a number of recommendations for a better market operation on the one hand and to optimise the Belgian competitive position in the e-commerce sector on the other.**

In the past few years turnover and volume in both the parcel and express segment have been booming in Belgium. The Belgian e-commerce market is marked by its relatively small national volume, even if Belgium recorded the third largest growth in B2C e-commerce compared to the other European countries in 2015. In spite of this strong growth neighbouring countries such as France, Germany and the Netherlands show a greater maturity.

Although great logistical competences are present in Belgium and various innovative delivery options are available on the Belgian market, the KPMG study shows that the e-commerce developments are more pronounced in the neighbouring countries. Those countries have been quicker to start e-commerce, thus giving them a lead. As Belgium is no early adopter in e-commerce the Belgian parcel deliverers may suffer a competitive disadvantage on their home market compared to international players who are able to operate and provide services in more favourable conditions.

Because of the relatively small national market the international market becomes crucial to Belgian parcel deliverers and e-retailers. The latter need to be able to create a sufficiently distinct profile for themselves on the international e-commerce market in order to achieve economies of scale and synergies.

The KPMG study points out 3 obstacles to further development of the Belgian e-commerce market, in spite of many Belgian initiatives: 1) a mismatch of supply and demand, 2) a lack of transparency in tariffs, supply and formalities and 3) a lack of uniformity.

In order to offer a solution KPMG formulates a series of recommendations at the international, national and regional levels.

At the European and international levels the study pleads for raising transparency in international e-commerce by having public authorities collect and publish non-sensitive market data, such as turnover, volumes, supply and tariffs, customs charges and customs formalities. In order to improve the uniformisation of administrative obligations efforts should be made for the standardisation of bar codes of parcel deliverers, the electronic CMR delivery note and a simplified procedure for clearing postal items at the customs office. Finally, it is recommended to introduce a fairer and binding tariff system for a maximum number of postal operators.

At the national level KPMG recommends to have a better correspondence between the needs and expectations of parcel deliverers, e-retailers and end-consumers concerning delivery preferences and options. At the supply side for instance, the impression is often that consumers want an increasingly faster delivery (which as a consequence is shown in the new trends on the market, among which same day delivery or even delivery within hours after the order) but research reveals that a faster delivery in general does not prevail for end-consumers. Their main wish is to have a free or minimum delivery tariff and comfort (home delivery). In addition parcel deliverers are under the impression that there is limited demand for evening and Sunday deliveries, although research into end-consumer preferences shows that a significant part of the online consumers desire this. Therefore, the KPMG study pleads for a stronger cooperation between the various stakeholders (e-retailers, the regulator, postal operators, customer associations) in a working group that proactively monitors the trends in e-commerce. In order to improve Belgian companies' competitive position in the e-commerce sector at an international level, the KPMG study also recommends to amend the labour legislation, more specifically as regards night labour, wage costs and flexible working hours.

Finally, at the regional level the KPMG study pleads for clear guidelines regarding the relatively unknown and in practice hard to implement obligation to take back scrapped electric and electronic appliances. In addition the study also points out that sustainable parcel delivery can be stimulated by bundling parcels for non-urgent items, for instance. A limitation of the number of rides can result in cost savings and better protection of the environment, as well as less heavy traffic.

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