

PEOPLE'S DEMOCRATIC REPUBLIC OF ALGERIA
THE REGULATORY AUTHORITY OF POST AND ELECTRONIC COMMUNICATIONS



OBSERVATORY OF POSTAL MARKET



2023

Table of contents

I. I. NUMBER OF POSTAL MARKET OPERATORS BY REGIME	1
II. AUTHORISATION REGIME MARKET	1
1. Situation of the postal market under the authorisation regime.....	1
2. Change in shipment traffic	4
2.1. Trends in overall international traffic.....	4
2.2. Evolution Change in volume by type	4
II. SIMPLE DECLARATION REGIME MARKET	5
III. EXCLUSIVITY REGIME MARKET	5
IV. DEPLOYMENT OF POSTAL OPERATORS	6

I. NUMBER OF POSTAL MARKET OPERATORS BY REGIME

Regimes	Operators	2022	2023
Exclusivity	Operator of exclusivity regime (Algérie Poste)	1	1
Authorisation	Operators of International express courier	5	5
Simple declaration	Operators of domestic courier	65	57
Total		71	63

In 2023, the postal market accounts 63 postal operators compared to 71 operators in 2022.

II. AUTHORISATION REGIME MARKET

1. Situation of the postal market under the authorisation regime

1.1. Volume of international traffic

Traffic in objects	2022	2023
Aramex Algérie	96	0
Conexlog	41 615	36 635
DHL International Algérie	790 035	519 809
EMS Champion Post	165 537	133 706
Falcon Express Algérie	3 174	8 576
Total	1 000 457	698 726

Source: Operators

The international express courier market recorded a total volume of 698 726 items in 2023, marking a decrease of 1 000 457 items compared to 2022. This decrease reflects an overall decline in the market of 30,16%.

Shipments handled by DHL International Algérie fell from 790 035 shipments in 2022 to 519 809 in 2023, a decline of 34,20%.

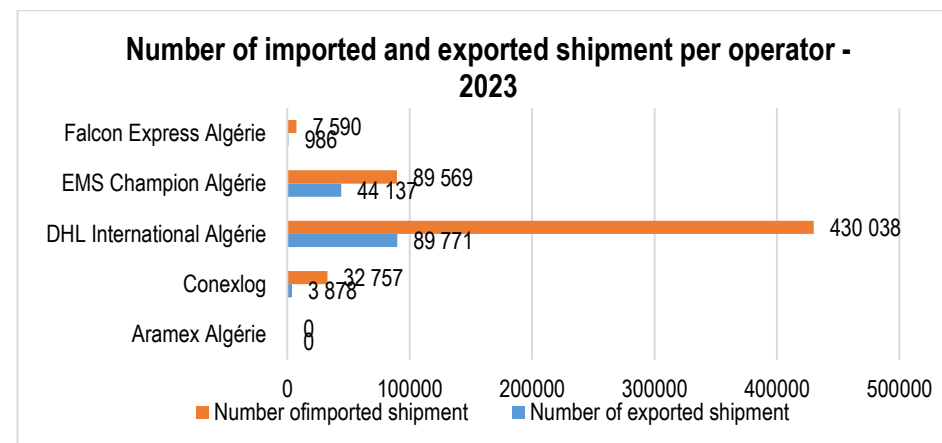
On the other hand, EMS Champion Post also experienced a decline, with traffic falling from 165 537 to 133 706 shipments between 2022 and 2023.

a. Number of imported and exported shipments by operator

Imported items decreased from 861 984 shipments in 2022 to 559 954 in 2023. The volume of exported shipments remained almost constant, showing a slight increase of 0,22%, from 138 473 in 2022 to 138 772 in 2023.

Traffic in objects	Number of exported shipments		Number of imported shipments	
	2022	2023	2022	2023
Aramex Algérie	72	0	24	0
Conexlog	4 635	3 878	36 980	32 757
DHL International Algérie	85 291	89 771	704 744	430 038
EMS Champion Post	47 600	44 137	117 937	89 569
Falcon Express Algérie	875	986	2 299	7 590
Total	138 473	138 772	861 984	559 954

Source: operators



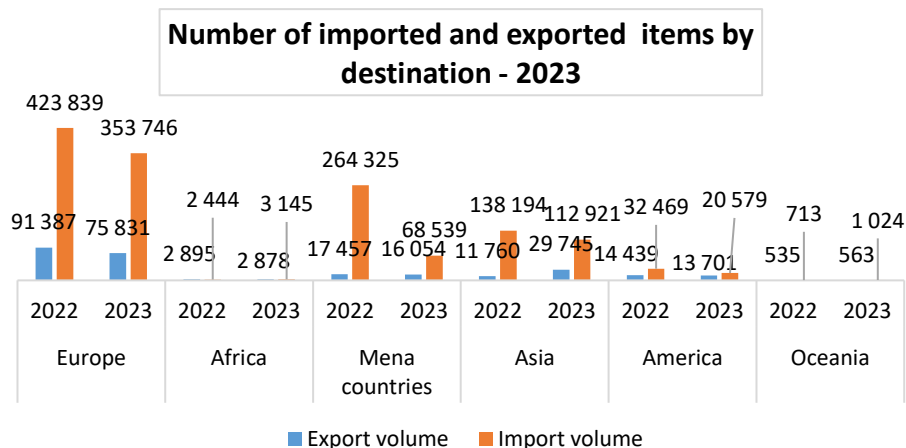
b. Number of imported and exported shipments by destination

The number of shipments to foreign countries increased by 299 units in 2023, with a 153% growth toward Asia. While shipments to the MENA region decreased by 8% and those to America increased by 5%. Inbound flows decreased by 302 030 imported items. However, the most significant change in imports concerns the MENA region, where flows fell by 195 786 shipments compared to 2022, representing a 74% decrease.

Traffic in objects	Number of exported shipments		Number of imported shipments	
	2022	2023	2022	2023
Africa	2 895	2 878	2 444	3 145
America	14 439	13 701	32 469	20 579
Asia	11 760 *	29 745	138 194*	112 921
Europe	91 387	75 831	423 839 *	353 746
Oceania	535	563	713	1 024
MENA countries	17 457	16 054	264 325 *	68 539
Total	138 473	138 772	861 984	559 954

Source : operators

*These figures have been corrected from those published in the observatory of 2022.



c. Number of shipments imported and exported by type and operator

Over the period analyzed, contrasting trends were observed depending on the type of shipment and the operators concerned.

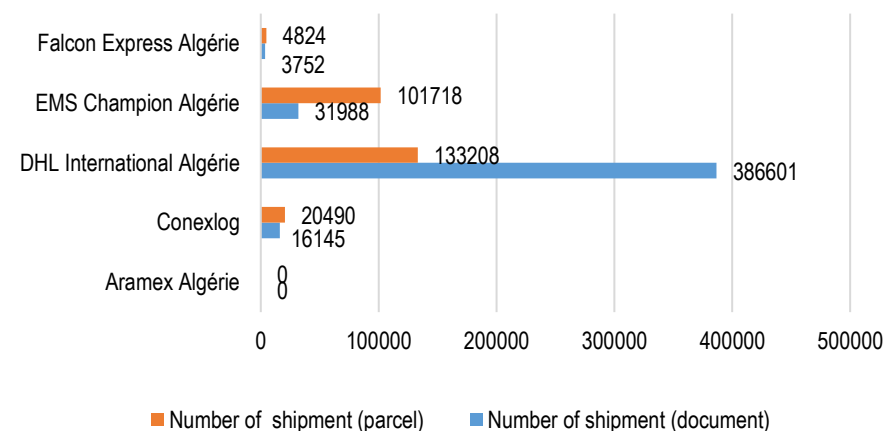
The number of document shipments increased by 5,15% overall, from 417 007 shipments in 2022 to 438 486 in 2023. This increase reflects a slight growth in document delivery activity.

Regarding the number of parcel shipments, a decrease of 55.40% was observed, falling from 583 450 shipments in 2022 to 260 240 in 2023.

Traffic in objects	Number of shipment (Document)		Nombre d'envois (parcel)	
	2022	2023	2022	2023
Aramex Algérie	96	0	0	0
Conexlog	12 658	16 145	28 957	20 490
DHL International Algérie	371 107	386 601	418 928	133 208
EMS Champion Post	30 932	31 988	134 605	101 718
Falcon Express Algérie	2 214	3 752	960	4 824
Total	417 007	438 486	583 450	260 240

Source : operators

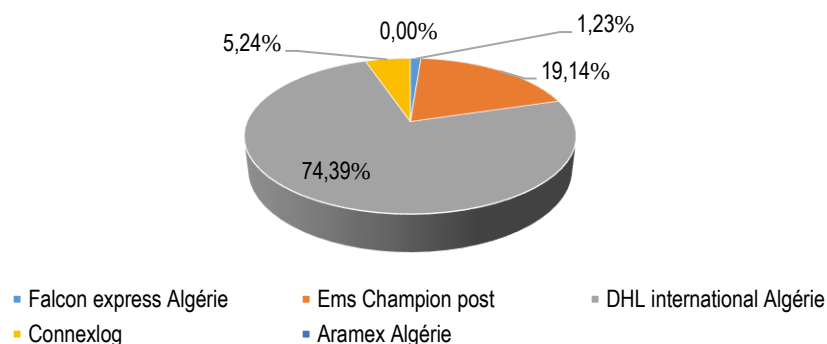
Number of imported and exported shipment by type and per operator - 2023



1.2. Market shares

Regarding the market share of international express mail for 2023, DHL International Algeria and EMS Champion Post hold 74.39% and 19.14% of the market share respectively. The remaining market share is shared between Conexlog and Falcon Express Algérie.

Market share in items of international traffic volume - 2023



2. Change in shipment traffic

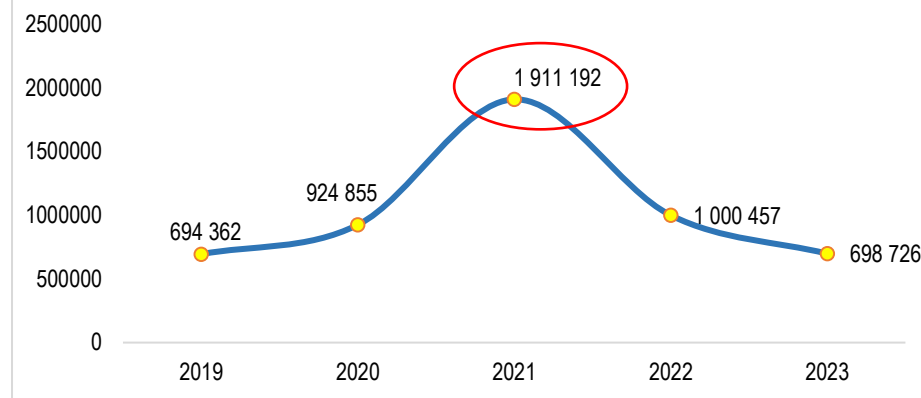
2.1. Trends in overall international traffic

	2019	2020	2021	2022	2023
overall international traffic	694 362	924 855	1 911 192	1 000 457	698 726
Evolution rate (2019-2023)				+0,63%	

Between 2019 and 2023, overall international traffic experienced significant fluctuations: it rose from 694 362 shipments in 2019 to a peak of 1 911 192 in 2021, before gradually declining to 698 726 in 2023. The exceptional peak recorded in 2021 can be attributed to the temporary effects of the COVID-19 global health crisis, which generated a specific and temporary increase in traffic.

Over the period as a whole, the trend is generally downward, with a decrease in traffic volume despite significant year-on-year variations.

Change in overall tariff under the authorisation regime 2019-2023



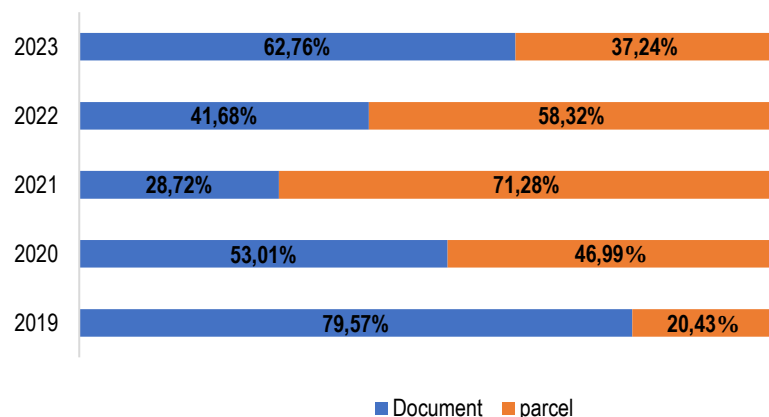
2.2. Evolution Change in volume by type

Between 2019 and 2023, the change of international traffic volume per nature reflects the transformation of the postal market marked by the sanitation crisis and the rise of e-commerce.

Initially dominated by documents (79,57% in 2019), the market shifted in favor of parcels during the pandemic. The peak was reached in 2021, when parcels accounted for a clear majority (71,28%), as a result of lockdowns and the growth of e-commerce during the health crisis.

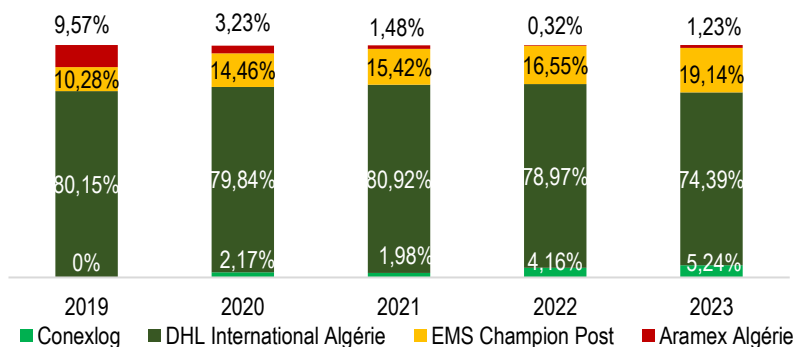
From 2022 onwards, the share of parcels will decline (58,32%), but will remain in the majority. However, in 2023, the trend will reverse: the share of documents will once again become the majority at 62,76%. This dynamic suggests that the effects of the pandemic will be mitigated. Nevertheless, the share of parcels in 2023 (37,24%) will remain structurally higher than before the pandemic (20,43% in 2019), reflecting changing habits and the sustained growth of global e-commerce.

Change in volume by type 2019-2023



2.3. Evolution Change in market share by volume under the Authorisation regime

Change in market shares by volume 2019-2023



III. SIMPLE DECLARATION REGIME MARKET

The postal market for the simple declaration regime fell from 30 718 493 items in 2022 to 17 547 752 items in 2023, a decrease of 42,88%.

Traffic volume	2022	2023
Algérie Poste (more than 50 g)	27 381 285	10 123 710
<i>Evolution rate</i>	-63 ,03%	
Other operators	3 337 208	7 424 042
<i>Evolution rate</i>	+122,46%	
<i>Total traffic</i>	30 718 493	17 547 752
<i>Evolution rate</i>	-42,88%	

Source : Algérie Poste

IV. EXCLUSIVITY REGIME MARKET

The market share of the exclusive postal service fell from 135 605 210 items in 2022 to 53 644 915 items in 2023, a decrease of 60,44%.

Traffic volume	2022	2023
Total	135 605 210	53 644 915
<i>Evolution rate</i>	-60,44%	

Source : Algérie Poste

V. DEPLOYMENT OF POSTAL OPERATORS

