

# ASIAN-PACIFIC POSTAL UNION NEWSLETTER



## FROM SECRETARY-GENERAL'S DESK



### Greetings from the Asian-Pacific Postal Union!

As we bring 2025 to a close, I would like to extend my warmest greetings to all of you and express my sincere appreciation for your continued commitment to the work of the APPU community. This has been a year marked by transition for the global postal sector, yet our region has shown remarkable resilience, steady progress, and a spirit of cooperation that continues to strengthen our collective capacity.

Earlier this month, we gathered in Bangkok for the 12<sup>th</sup> APPU Postal Business Forum. The discussions, presentations, and exchanges throughout the week reflected not only the challenges we face, but also the determination across our region to navigate them thoughtfully. I was especially encouraged by the openness demonstrated during the Postal CEOs Roundtable, where leaders from different parts of the world shared how they are reshaping strategy, modernising operations, and building the partnerships needed for the next phase of growth. Despite vast differences in market scale and national context, their priorities were strikingly aligned — digital transformation, operational redesign, and stronger collaboration within and beyond the postal family.

This year's Postal Innovation Awards also reminded us that innovation is not confined to large operators alone. The projects recognised — from digital addressing and community-based solutions to sustainability frameworks and large-scale AI applications — show the breadth of ideas emerging across our region. These initiatives reflect the commitment of member countries to improve services, experiment with new models, and invest in transformation even when resources are limited.

Our training programmes at the Asian-Pacific Postal College also concluded on a strong note. The final courses of the year, including the Postal Management Course — with its study tour to Japan — and the Human Resource Management Course, brought our 2025 calendar to a meaningful close. I extend my gratitude to all institutions and experts who contributed to these programmes throughout the year.

Looking ahead to 2026, the region enters a period where the pace of change will only intensify. The discussions at the Business Forum made it clear that the next few years will require decisive steps:

- embracing data-driven and intelligent systems,
- reconfiguring our physical networks for a new demand landscape,
- strengthening cross-border capabilities, and
- investing in people, skills and leadership at every level.

At APPU, our priority will be to continue supporting members through these shifts — through research, regional dialogues, and an expanded training calendar designed to help operators build the competencies needed in an increasingly digital, competitive, and interconnected environment.

As we conclude this year, I would like to once again thank all member countries, partners, and colleagues who contributed to the APPU activities undertaken throughout 2025.

I wish you and your families a peaceful holiday season, Merry Christmas and a successful start to the New Year. Together, let us continue building a postal sector that is more resilient, more innovative, and more connected in 2026 and beyond.

Warm regards,

**Dr. Vinaya Prakash Singh**  
Secretary-General, APPU



## Postal CEOs Roundtable: Strategy, Growth and Partnerships in a Time of Transition

The Postal CEOs Roundtable, held on 1 December evening, brought together leaders from across the region for an open, forward-looking exchange on how Posts are navigating a period of rapid transition. The session began with welcome remarks by Dr. Vinaya Prakash Singh, Secretary General of APPU, followed by opening remarks from Mr. Marjan Osvald, Deputy Director General of the UPU, who highlighted the growing importance of collective leadership as Posts enter a more complex and technology-driven era.

From there, the programme moved directly into the CEO discussions, structured around two guiding questions on strategic transformation and partnership opportunities. Leaders from Asia-Pacific, the Middle East, Europe and the Americas shared their candid views, revealing a strong alignment in both priorities and challenges across markets of very different scales.

## HOW CEOS RESPONDED TO QUESTION 1: POTENTIAL STRATEGIC SHIFTS FOR THE NEXT 3–5 YEARS?

Postal leaders consistently pointed to two strategic imperatives that will shape their organizations in the coming years:

### 1. Digital and Intelligent Transformation

Across the room, CEOs emphasised the urgency of moving beyond traditional operating models toward data-driven, AI-enabled, and automated postal systems.

Different operators highlighted their approaches:

- China Post outlined its next-generation smart postal vision built on AI large models across all scenarios.
- Pos Malaysia stressed digitalisation as a practical way to remove structural cost and restore competitiveness.
- USPS noted that analytics and visibility will underpin future service and network modernisation.
- Iran Post described its shift toward a fully data-driven national postal framework.
- Bhutan Post, Fiji Post, and Thailand Post linked digital change with workforce capability and customer-centric culture.

### 2. Reconfiguring Physical Networks and Operations

With mail volumes declining and customer expectations rising, CEOs noted that they must redesign operations, networks, and service models.

Examples included:

- Emirates Post, proposing that post offices become micro-fulfilment centres for quick commerce.
- Pos Malaysia, calling for legislative and USO reform to reduce fixed network costs.
- PHLPost, building climate-resilient last-mile solutions across its island geography.
- Bhutan Post, piloting parcel lockers and digital post offices.
- Thailand Post, balancing universal service with the realities of growing e-commerce competition.

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## CONTINUE

Three major barriers emerged from the discussion:

- Legacy IT systems that are costly to maintain and difficult to modernise.
- High labour and infrastructure costs, often tied to statutory obligations.
- Talent and data gaps, especially in digital skills and cross-business data integration.

Several CEOs and postal leaders noted that the transformation window is short — in some cases 1–3 years, not 5 — given the pace of change in the market.

## HOW CEOS RESPONDED TO QUESTION 2: THE PARTNERSHIPS THEY VALUE MOST?

### 1.E-commerce and Quick Commerce Partnerships

Many operators see strong potential in working with:

- major marketplaces,
- logistics platforms,
- and cross-border fulfilment providers.

Emirates Post highlighted its work with Amazon as an example of how postal networks can support rapid fulfillment and neighborhood-level operations.

### 3.Government Partnerships

Governments play a key role in enabling modernization through:

- USO reform,
- digital identity and address frameworks,
- and support during disasters or nationwide logistics needs

Iran, China (P.R.), the Philippines, Fiji, and others highlighted the importance of strong public-sector collaboration.

### 2.Technology and Data Partnerships

CEOs emphasized the value of jointly developing:

- data platforms,
- AI pilots,
- address systems,
- visibility and tracking solutions.

Smaller Posts noted that regional and UPU cooperation is essential to ensure affordability and scalability.

### 4.Partnerships Across the Postal Family

Many CEOs spoke of the growing importance of bilateral cooperation among Posts — whether in transportation, operational innovation, or cross-border products — to remain competitive and expand capacity.



## APPU POSTAL INNOVATION AWARDS 2025



The APPU Postal Business Forum hosted its annual Postal Innovation Awards Ceremony, recognising outstanding initiatives that reflect the region's creativity, determination, and growing technological ambition. This year saw 15 project submissions, spanning digitalisation, data systems, green logistics, community models, and new customer tools — a clear sign that innovation continues to thrive across the Asia-Pacific.

The ceremony opened with remarks highlighting a message familiar to many in our community: ideas are everywhere, but what truly matters is turning them into reality. The diversity of submissions demonstrated how postal operators of all sizes are working to modernise services while responding to new market needs.

### SPECIAL MENTIONS

- *National Post Company of Iran – Nomadic Post*
- *India Post– DIGIPIN*
- *Thailand Post Co., Ltd – Postman Cloud*

### RISING STAR IN INNOVATION AWARD

- *Bhutan Post – Cloud-Based Integrated Counter Automation System*

### INNOVATION AWARD

- *China Post Group Corporation– Full-Scenario Application of the “Hongyan” AI Large Model*
- *Pos Malaysia Berhad – Leading Malaysia’s Green Logistics Revolution*



## SPECIAL MENTION



### NATIONAL POST COMPANY OF IRAN – NOMADIC POST

A digital-physical service model designed to support nomadic communities through dynamic postal codes, mobile post offices, tailored delivery routes, and a linked e-commerce platform.



### INDIA POST- DIGIPIN

A geocoded digital addressing system assigning a unique 10-character code to every 4x4 metre grid, helping reduce address ambiguity and strengthen last-mile reliability across postal and e-commerce networks.



### THAILAND POST CO., LTD – POSTMAN CLOUD

An initiative repurposing Thailand Post's nationwide postman network to deliver survey, express, validation, and hyperlocal community services, expanding the postal role beyond traditional logistics.

## RISE IN INNOVATION AWARD



### BHUTAN POST – CLOUD-BASED INTEGRATED COUNTER AUTOMATION SYSTEM

A unified digital environment consolidating counter and back-office operations to improve visibility, accuracy, and service efficiency across the network.



## INNOVATION AWARD



### CHINA POST GROUP CORPORATION – FULL-SCENARIO APPLICATION OF THE 'HONGYAN' AI LARGE MODEL

A comprehensive framework applying AI across marketing, customer service, operations, and planning through a cloud-edge-terminal architecture.



### POS MALAYSIA BERHAD – LEADING MALAYSIA'S GREEN LOGISTICS REVOLUTION

An integrated sustainability programme combining solar energy, electric fleets, telematics, waste-reduction measures, and customer-facing carbon transparency tools.



## INTRODUCING THE 2026 APPC TRAINING CALENDAR

Period	No.	Courses	Period	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1	1	Digital Financial Services (DFS)	1 week (24 Jan - 27 Jan)												
2	2	EMS	1 week (28 Jan - 31 Jan)												
3	3	Business Development and Marketing (BDM)	4 weeks (1 Feb - 27 Feb)												
4	4	Managing Quality of Service (MQS)	4 weeks (1 Feb - 27 Feb)												
5	5	International Postal Services (IPS)	4 weeks (27 Feb - 27 Mar)												
6	6	Marketing and Innovation for Postal (MIP)	4 weeks (27 Mar - 27 Apr)												
7	7	Human Resource Management (HRM)	4 weeks (27 Apr - 27 May)												
8	8	Postal Logistics and Operations Management (PLOM)	4 weeks (27 May - 27 Jun)												
9	9	E-Business and Technology (E&T)	4 weeks (27 Jun - 27 Jul)												
10	10	International Mail Accounting (IMA)	4 weeks (27 Jul - 27 Aug)												
11	11	Digital Transformation in Postal Sector (DTPS)	4 weeks (27 Aug - 27 Sep)												
12	12	Postal Strategy, Innovation and Education (PSIE)	4 weeks (27 Sep - 27 Oct)												
13	13	Customer Service and Supply Chain Management (CSCM)	4 weeks (27 Oct - 27 Nov)												
14	14	Postal Management (PM)	4 weeks (27 Nov - 27 Dec)												

APPC is pleased to share the 2026 Training Calendar, outlining the programmes planned for the coming year.

The schedule is organised into seven training periods, with two courses running side by side in each period, giving members flexibility to choose the ones that best fit their needs and work plans.

As in previous years, the calendar also includes several short, one-week workshops linked to the main courses. These offer an opportunity for participants to focus on specific areas of interest or to complement longer training programmes.

We invite member countries to see the calendar and consider the programmes that may be useful for their teams. Early planning will help ensure smoother coordination and better preparation for participants.

We look forward to welcoming colleagues from across the region in 2026 and continuing our shared efforts in building skills and knowledge within the postal community.

## SUSTAINABLE DEVELOPMENT IN THE POSTAL SECTOR WORKSHOP



APPU welcomed participants from across the region for a week-long workshop on sustainable development in the postal sector, generously supported by La Poste. The programme combined classroom sessions at the Asian-Pacific Postal College with dedicated sustainability discussions during the APPU Postal Business Forum.

Participants explored UN SDG mapping, emerging sustainability trends in postal operations, and sector-wide initiatives. A highlight of the week was the expert-led sessions by Ms. Margaux Meidinger, Head of European CSR at La Poste, who guided participants through topics such as fleet decarbonisation, circular economy practices, gender equality, and the growing impact of new delivery models.

With the courtesy support of La Poste, the workshop also offered fellowship opportunities, allowing broader regional participation and strengthening collective learning across the Asia-Pacific.

## PMC & HRM COURSES CONCLUDE APPC'S 2025 TRAINING YEAR

As the final two programmes of APPC's 2025 training calendar, the Postal Management Course (PMC) and the Human Resource Management (HRM) Course brought this year's learning journey to a meaningful close. Participants spent several weeks deepening their understanding of postal strategy, operational transformation, people management, analytics, innovation, and the evolving demands of a modern postal workforce. Both courses also benefited from practical field visits and the opportunity to join selected sessions of the APPU Postal Business Forum, strengthening the connection between classroom learning and real-world practice.



A special highlight of the PMC was its week-long study tour to Japan, where participants visited multiple Japan Post facilities to observe cutting-edge operations and learn from Japan Post's experience in service quality, technology adoption, and customer-centric design. We extend our sincere thanks to Japan Post for their warm reception and generous support in making this study tour possible.

The APPC team is pleased to highlight the strong engagement shown throughout the programmes. Among all participants, **Miss Sirtorn Rojanamaitree of Thailand Post** stood out for her steady performance, thoughtful insights, and active participation across the PMC sessions. She has been recognised as the Outstanding Participant of the Postal Management Course 2025.

With the successful completion of these two courses, we wrap up an enriching training year. Our warm congratulations go to all participants, and we look forward to a new cycle of learning and collaboration in 2026.



# INDUSTRY TRENDS



escher

## KEY INSIGHTS FROM FUTURE OF THE POSTS 2025

(SHARED BY BRODY BUHLER, CEO OF ESCHER GROUP)

At the Business Forum, Escher Group presented the latest findings from the ninth annual edition of the Future of the Posts survey, which included insights from 290 respondents from 89 national postal operators. The presentation also featured data from Escher's analytics platform and offered a snapshot of how the postal industry is evolving.

### 1. FINANCIAL PRESSURE CONTINUES

Many operators face pressure to invest, with 82% saying market conditions are making investment more difficult.

### 2. MAIL RETURNS AS A STRATEGIC PRIORITY

Addressing declining letter mail volumes is the top priority for 92% of Posts. Heavy dependence on mail revenue, however, still poses financial risks.

### 3. EXCESS CAPACITY ACROSS NETWORKS

Most operators now have more operational capacity than they need. As a result, many are focused on increasing sales to better use existing networks. Parcel yields continue to fall in several regions.

### 4. E-COMMERCE: INTEGRATION MATTERS MOST

For retailers, the most important requirement from delivery partners is seamless integration with their systems. Speed still matters, but integration now strongly influences which partner they choose.

Are Posts missing an opportunity with ecommerce returns? Reverse logistics remain a weak point for Posts because most offer only first-mile options, not full end-to-end solutions.

### 5. COST REDUCTION FOCUS REMAINS ON THE LAST MILE

Operators continue to prioritise last-mile optimisation, workforce planning, and automation. Transport optimisation is now less of a focus, as many Posts have already modernised their systems.

### 6. RETHINKING THE RETAIL NETWORK

There is renewed attention on owned post offices. Posts are

looking at how to make existing networks more efficient through self-service, lockers, and digital tools.

### 7. CUSTOMER EXPERIENCE SHIFTS TOWARD ANALYTICS

Customer experience remains important, but the focus is moving toward using data and analytics. Many Posts hope to adopt AI, but integration challenges and limited skills slow progress.

### 8. CROSS-BORDER SERVICES: DUTY AND DATA

Accurate tax and duty data is the top priority. Retailers increasingly want Delivered Duty Paid (DDP) solutions, which improve conversion rates and customer satisfaction.

### 9. SUSTAINABILITY FOCUS ON FLEETS

More operators are turning to electric and hybrid vehicles, though progress varies by region.

The APPU team sends you

OUR WARMEST WISHES FOR A JOYFUL, HEALTHY, AND PROSPEROUS NEW YEAR.

May 2026 bring renewed strength and success to all our members.