

HOW THE NEXT DECADE OF POSTAL WILL BE WON



The postal industry has spent a decade adapting to e-commerce. The next decade is different. Retailers are using AI to run their businesses. Customers are starting to use AI to shop. But delivery is still the one physical moment a customer connects with the brand, and is where trust is won or lost.

"Nobody in this industry is getting delivery wrong. Every operator delivers – the question is how much more they could get right. For two centuries postal networks have been built and measured from the sender's side: cost, margin, efficiency. But it's the receiver who decides how it's actually experienced. The next era belongs to the operators who finally optimize for both."



Bob Black, TMX Transform
non-executive board director &
former Australia Post chief
operating officer

Five Forces Reshaping the Industry

INTELLIGENT COMMERCE:

Postal networks are no longer supporting retail, they're becoming part of the customer experience itself.

CUSTOMER CONTROL:

Delivery is evolving from a standard service into a personalized, on-demand experience.

AGENTIC AI:

Tomorrow's customer may increasingly be an intelligent digital assistant, not a person.

INTELLIGENT SUPPLY CHAINS:

Static networks are giving way to ones that simulate, learn, and adapt in real time.

TRUST & SUSTAINABILITY:

Postal's oldest asset, public trust, is becoming its sharpest competitive edge.



Five Capabilities that will Define the Leaders

DESIGN:

Adaptive networks built around customer demand, not legacy infrastructure.

MOVE:

A last mile that bends around the customer, not the other way around.

PREDICT:

AI, simulation, and digital twins that anticipate demand before it hits.

CONNECT:

One fulfillment ecosystem linking retailers, customers, and AI agents.

LEAD:

Moving from transactional carrier to trusted strategic partner.

"Postal organizations have always connected people. The next generation will connect intelligent commerce. As artificial intelligence reshapes how customers buy, retailers fulfil and supply chains operate, postal authorities have an extraordinary opportunity to evolve from delivery providers into trusted commerce platforms. The organizations that lead won't simply deliver parcels more efficiently – they'll help retailers build loyalty, enable customer choice and become trusted partners in an increasingly autonomous world."

The organizations already implementing intelligent supply chains are cutting lead times by hundreds of days and shifting from reactive to predictive operations.

The future of postal belongs to whoever builds the smartest network, not the largest one.



Christine Corbett, TMX Transform
Strategic Advisor & former Australia
Post Chief Customer Officer

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