

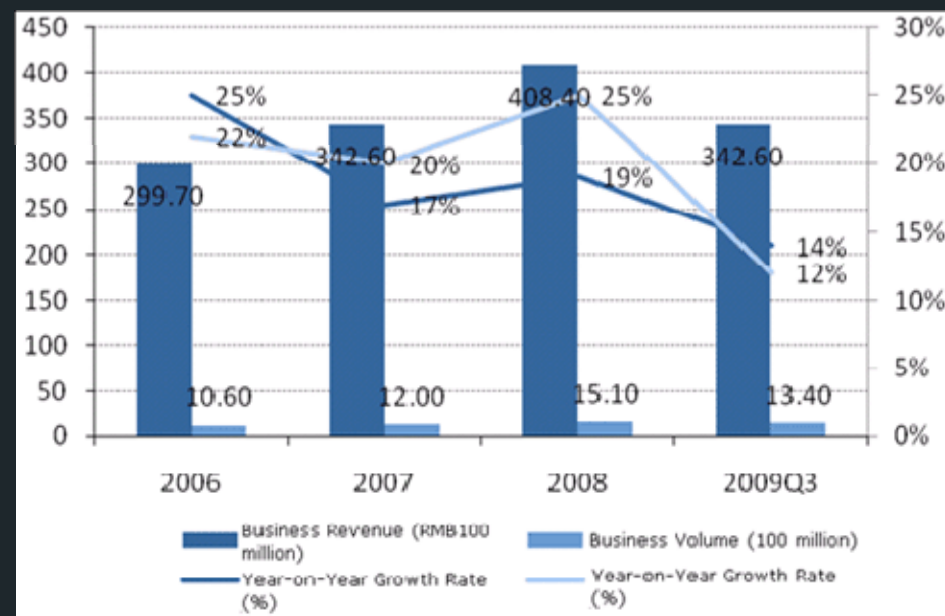
China Express Delivery Industry Report, 2009



In Q3 2009, the business revenue of express delivery in China exceeded RMB4 billion/month, and monthly business volume and revenue rose by more than 20% respectively. The industry is as a whole promising.

In Jan-Sep, 2009, China's express delivery business revenue totaled RMB34.26 billion, with an increase of 14.8% compare to the same period of last year. The industry gradually restored the steady and rapid development. The business volume registered 1.34 billion pieces, up 22.4% over the same period of 2008.

Development of China Express Delivery Industry, 2006-2009



Source: ResearchInChina; State Post Bureau of the People's Republic of China

The local business volume reached 320 million pieces with an increase of 8.4%, the revenue was RMB2.53 billion with an increase of 8.8%; cross-regional business volume amounted to 940 million pieces with an increase of 30.4%, the revenue was RMB19.17 billion with an increase of 23.6%; and business volume in the world, Hong Kong, Macao and Taiwan arrived at 80.008 million pieces, up 1.1%, the revenue was RMB10.83 billion, down 0.3%. Overall, China's express delivery business is resuming growth and the businesses have shown a steady upward trend. It is expected that China's express delivery business will grow again in 2010.

Since the new "Postal Law" was promulgated and implemented in 2009 as well as the increase of labor cost and other costs, among local express delivery companies and franchised express delivery companies, only the excellent ones can survive, while those with bad performance will be eliminated quickly. About 40% of local express delivery companies and 30% of franchised express delivery companies will be merged, reorganized, deputized or closed down.

This report delves into the development of China express delivery industry and the competition in major regional markets. This report analyzes the development, operation, strategies, layout in China and the latest progress of major express companies (including UPS, FedEx, DHL, TNT, EMS, SF-express, etc.). On this basis, the report forecasts the future development trends of China express delivery industry, so that enterprises can understand Chinese express delivery market better, and the report puts some suggestions on the operation and investment decision-making for reference.

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