



China Express Delivery Industry Report, 2011

Dec. 2011

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

Report Objectives

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and understand the size and growth rate of any opportunity.

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study.

Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

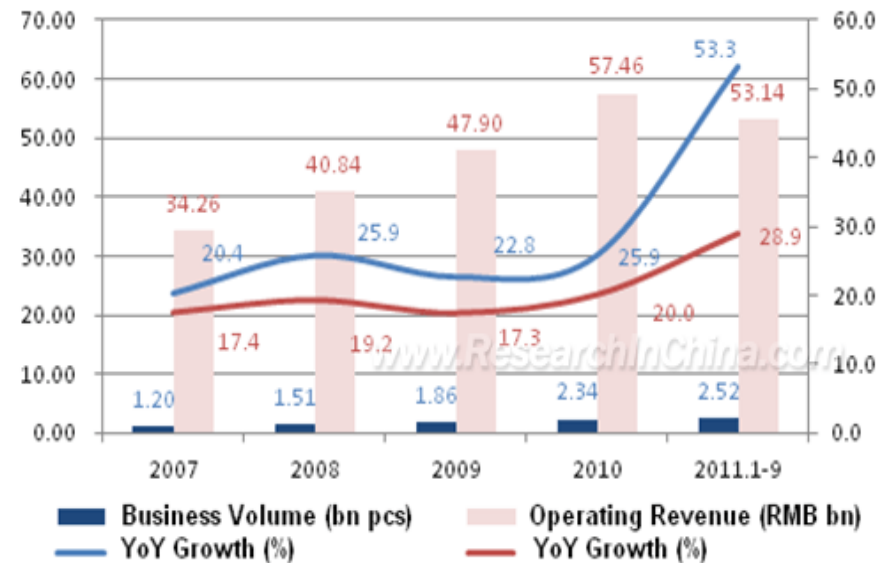
The primary information sources include NBS(National Bureau of Statistics of China)、China Customs, Wind, and State Post Bureau of the PRC etc..

Abstract

In July, 2011, in the “Twelfth Five-Year (2011-2015)” plan on the development of postal industry issued by State Post Bureau of the People’s Republic of China, the following “twelfth five-year” development indicators were put forward for the express delivery industry: the network coverage of key express delivery enterprises came up to 98% in municipalities and provincial capitals, and over 90% in provincially administered municipalities; and the key express delivery enterprises realized the 72-hour inter-provincial capital and inter-key city express delivery rate of more than 90%, express delay rate of lower than 0.8%, damage rate of lower than 0.01%, and loss rate of lower than 0.005%.

The express delivery business of China has witnessed rapid growth in 2011. Up to the end of September of 2011, Chinese express delivery companies (with annual sales of over RMB5 million) had made 2.52 billion deliveries, up 53.3% year-on-year, and harvested RMB53.14 billion, a 28.9% YoY rise, of which Chinese inner-city express business revenue was RMB4.67 billion, with the year-on-year increase of 58.1%; the cross regional express business revenue rose 37% year-on-year to RMB30.73 billion; and the international and Hong Kong, Macao and Taiwan business revenue was RMB13.57 billion, a slight rise of 4.9% from the same period of last year.

Development of China Express Delivery Industry, 2007-2011



Source: State Post Bureau of the PRC; ResearchInChina

From January to September of 2011, 1.125 billion deliveries were made in Guangdong, Zhejiang and Shanghai, accounting for 44.64% of the national business volume, and achieved RMB25.697 billion with a 48.36% share of the total business revenue in China.

'Research report on the express delivery industry in China' mainly covers the followings:

- (1) The twelfth five-year plan of national express delivery industry and the twelfth five-year plan of express delivery industry in key provinces and cities;
- (2) Development status, business classification, market structure, price and competition structure of the express delivery industry in China;
- (3) Analysis on the express delivery industry in important provinces and cities in Guangdong, Shanghai, Beijing and Jiangsu etc.
- (4) Performance of UPS, FedEx, DHL and TNT in Chinese express delivery market.
- (5) Development history, corporate operation, SWOT analysis and market strategy of 15 local express delivery enterprises (including EMS, China Sinotrans Group, China Railway Express, Air Express, SF Express, STO Express, ZJS Express, YTO Express, Yunda Express, ZTO Express, etc.)

EMS: The revenue of China Post Group footed up to RMB189.9 billion in 2010, presenting an AAGR of 18.5% during the 11th Five-Year Plan (2006-2010); wherein, the proceeds of express business saw an average growth rate of 19.2%.

Currently, EMS possesses 16 cargo aircrafts, 40 national airlines, 2 international airlines, more than 20 thousand transportation vehicles, 8 collecting and distributing centers and 31 provincial distribution centers.

SF Express: its operating revenue has maintained high-speed growth since 2003, with an AAGR of over 40%; and the figure in 2010 registered RMB12 billion. In August, 2011, SF Express increased RMB400 million to reshuffle stock rights of SF Airlines whose air fleet covers two Boeing 757-200 All-Cargo Aircrafts and three Boeing 737-300 Aircrafts at present.

ZJS Express: its operating performance has saw a comparatively slow rise since 2004, and it made negative growth affected by economic crisis during 2008-2009. However, the operating revenue of the company hit around RMB2 billion in 2010, soaring 66.7% from a year earlier and setting a new high record.

In next a few years, e-commerce will further drive the steady and rapid growth of the express delivery industry, and the operating costs will rise ever and spur the price hike of express delivery. As the market expands, for considerable benefit, a growing number of companies in the express delivery sector will be merged and reorganized.....

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