



China General Cargo Logistics Industry Report, 2011-2012

Jun 2012

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

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 National Bureau of Statistics of China, China Customs and industry association etc.

Abstract

In China, the logistic cost is increasing these years. In 2007, the gross external logistic cost of China broke RMB4 trillion, while the figure in 2009 hit RMB6 trillion. In 2011, China's external logistic cost totaled RMB8.4 trillion, accounting for 17.8% of the GDP. By the structure of logistic cost, the transportation fee, warehousing charges and logistics management fee stands at 55%, 33% and 12%, respectively.

Of China's top 50 logistic enterprises, 22 ones are transportation oriented, making up 44%; 26 ones are integrated businesses, occupying 52%; and the rest 2 are warehousing logistic firms, sharing 4%. Concerning geographical distribution of the top 50 businesses, 78% are spread in economically developed East China, 12% are located in West China, 8% in Central China, and the rest 2% in Northeast China.

In 2011, shipping companies suffered a hit in performance among transportation-oriented logistic enterprises. The reduction came as the glooming international economic environment, which caused the slash in demand and freight rate. And many shipping companies encountered heavy loss. In particular, the loss of China COSCO Holdings Company Limited reached RMB10.5 billion, followed by China Shipping Container Lines Co., Ltd. and Chang Jiang Shipping Group Phoenix Co., Ltd. with the respective loss of RMB2.7 billion and RMB880 million.

In 2011, the revenue of the top 8 integrated logistic companies was in excess of RMB1.0 billion each, among them Xiamen C&D Inc., Xiamen Xiangyu Group Corporation and Shanghai International Port Group (SIPG) were all with the revenue over RMB10 billion. When it comes to net income, SIPG ranked No.1 (RMB4.724 billion), followed by Tielong Container Logistics (RMB504 million) and Xiamen C&D Inc. (RMB230 million).

Revenue and Net Income of Listed Integrated Logistic Companies in China, 2011

Company	Revenue (RMB mln)	Net Income (RMB mln)
Xiamen C&D Inc.	80,300	230
Xiamen Xiangyu Group Corporation	33,934	178
Shanghai International Port Group (SIPG)	21,779	4,724
EternalAsia	7,025	135
CTS International Logistics	6,946	103
Feima International Supply Chain	5,960	77
Tielong Container Logistics	2,907	504
Yangtze River Investment	1,026	19

Source: ResearchInChina: 'China General Cargo Logistics Industry Report, 2011-2012'

In 2011, the warehousing logistic enterprises generate profit mainly from value-added services. The traditional custodian service saw negative profit, while businesses including freight forwarding, spot market and impawning supervision all pay off. In 2011, CMST Development, the warehousing business of which involves in steel, coal and non-ferrous metal, realized the gross margin of 4.5% and the net profit margin of 1.7%; Aucksun, the warehousing business of which mainly engages in IT metal materials, registered the gross margin of 10.1% and the net profit margin of 5.7%, respectively.

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