



# China Special Freight 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

This report highlights the study of large goods and dangerous cargo logistics, and also analyzes the highly specialized logistics fields, such as IT logistics, pharmaceutical logistics and home appliance logistics.

Automotive logistics providers often depend on large groups. The logistics subsidiaries of large automakers like SAIC and Changan Automobile Group not only engage in their own automotive logistics, but also provide logistics services for other small automotive brands.

Fueled by the downstream demand, China's automotive logistics industry has witnessed robust growth. The net income of Changan Minsheng APLL Logistics Co., Ltd. achieved a CAGR of 35.6% in 2008-2011. The revenue of Anji TNT, 80% of whose businesses are vehicle logistics, grew at CAGR of over 25% in recent three years. Commercial automobile transportation has become the major business of China Railway Special Cargo Services Co., Ltd. which delivered 320,000 commercial automobiles in the first four months of 2012, equivalent to six times as its annual transportation volume in 2006.

## Revenue CAGR of Chinese Automotive Logistics Enterprises

	Affiliated to	Revenue CAGR in 2008-2011
Changan Minsheng APLL Logistics Co., Ltd.	Changan Automobile	30.1%
Anji Automotive Logistics Co., Ltd.	SAIC	26.2% (E)
FAW Logistics Co., Ltd.	FAW	37.8%
China Railway Special Cargo Services Co., Ltd.	The Ministry of Railways of the P.R.C.	13.7%

Source: ResearchInChina; 'China Special Freight Logistics Industry Report, 2011-2012'

The petrochemical logistics grows quickly in China and the top three providers are FreeTrade Science and Technology, Winbase and Oriental Energy. In 2008-2011, the revenue and net income of FreeTrade Science and Technology increased at a CAGR of 50.3% and 60% separately, and those of Winbase rose at a CAGR of 9.1% and 6.8% respectively.

China's pharmaceutical logistics is still in the stage of optimization of single link in the supply chain which hardly involves the integration of upstream pharmaceutical plants and providers and downstream wholesale & retail pharmaceutical enterprises and hospitals. There are a large number of small pharmaceutical logistics businesses, featuring low degree of industry concentration. The top 3 pharmaceutical logistics providers, namely, Sinopharm Logistics, Shanghai Pharmaceutical Logistics Center and Jointown Pharmaceutical Logistic Center, together make up less than 20% market share.

IT logistics providers are mainly located in the Yangtze River Delta and the Pearl River Delta. Affected by the industry climate, IT logistics industry is wholly on the decline in recent years. In 2008-2011, the revenue of Jianguo Feiliks International Logistics Inc. grew at a CAGR of negatively 16.8%, and the net income presented a CAGR of negatively 5.8%. And the revenue and net income of Xinning Logistics presented a CAGR of -26.8% and -9.8% separately.

### **1. Overview of Special Freight Logistics Industry**

- 1.1 Definition
- 1.2 Special Freight Transportation
  - 1.2.1 Transportation Scope
  - 1.2.2 Key Enterprise-COSCO Shipping Co., Ltd.

### **2. Automotive Logistics**

- 2.1 Introduction
- 2.2 Changan Minsheng APLL Logistics Co., Ltd.
  - 2.2.1 Profile
  - 2.2.2 Operation
  - 2.2.3 Customers and Suppliers
- 2.3 ANJI Automotive Logistics Co., Ltd.
  - 2.3.1 Profile
  - 2.3.2 Operation
  - 2.3.3 Development Strategy
- 2.4 China Railway Special Cargo Services Co., Ltd.
- 2.5 FAW Logistics Co., Ltd.
- 2.6 Fengshen Logistics

### **3. Petrochemical Logistics**

- 3.1 Status Quo
  - 3.1.1 Development Overview
  - 3.1.2 Development by Region
  - 3.1.3 Key Enterprises
- 3.2 Free-trade Science and Technology
  - 3.2.1 Profile
  - 3.2.2 Operation

- 3.2.3 Major Clients
- 3.2.4 Planning for 2012
- 3.3 Winbase
  - 3.3.1 Profile
  - 3.3.2 Revenue Structure
  - 3.3.3 Major Clients
  - 3.3.4 Market Position

### **4. Iron & Steel Logistics**

- 4.1 Development Overview
- 4.2 Europol
  - 4.2.1 Profile
  - 4.2.2 Revenue Structure
  - 4.2.3 Development Plan
- 4.3 Other Enterprises

### **5. Coal Logistics**

- 5.1 Status Quo
- 5.2 Daqin Railway Co., Ltd.

### **6. Pharmaceutical Logistics**

- 6.1 Current Situation
- 6.2 Development Trend
- 6.3 Sinopharm Logistics Co., Ltd.

### **7. IT Logistics**

- 7.1 Industry Overview
- 7.2 Market Competition
- 7.3 Jiangsu Feiliks International Logistics Inc.
  - 7.3.1 Profile
  - 7.3.2 Revenue Structure
  - 7.3.3 Clients & Suppliers
  - 7.3.4 Prospect for 2012
- 7.4 Xinning Logistics
  - 7.4.1 Profile
  - 7.4.2 Revenue Structure
  - 7.4.3 Major Clients
  - 7.4.4 Development Plan for 2012

### **8. Home Appliance Logistics Industry**

- 8.1 Status Quo
- 8.2 Development Trend
- 8.3 Main Enterprises
  - 8.3.1 Annto Logistics
  - 8.3.2 Attend Logistics

- Revenue and Net Income of COSCO Shipping Co., Ltd., 2009-2011
- Revenue of COSCO Shipping Co., Ltd. by Vessel Type, 2009-2011
- Gross Margin of COSCO Shipping Co., Ltd. by Vessel Type, 2009-2011
- Revenue of COSCO Shipping Co., Ltd. by Region, 2009-2011
- Gross Margin of COSCO Shipping Co., Ltd. by Region, 2009-2011
- Total Cost of Automotive Logistics in China, 2006-2011
- Chinese Automotive Logistics Enterprises and Distribution
- Revenue and Net Income of Changan Minsheng APLL Logistics Co., Ltd., 2008-2011
- Revenue of Changan Minsheng APLL Logistics Co., Ltd. by Business, 2008-2011
- Changan Minsheng APLL Logistics Co., Ltd.'s Revenue from Top 5 Clients and % of Total Revenue, 2010-2011
- Changan Minsheng APLL Logistics Co., Ltd.'s Procurement from Top 5 Suppliers and % of Total Procurement, 2010-2011
- Business Distribution of ANJI Automotive Logistics Co., Ltd. by Region
- Revenue of ANJI TNT, 2005-2010
- Market Share of Automotive Logistics Enterprises by Vehicle Transportation Volume, 2009-2010
- Revenue of China Railway Special Cargo Services Co., Ltd., 2005-2011
- Transportation Vehicle Type and Quantity of China Railway Special Cargo Services Co., Ltd.
- Total Assets and Revenue Growth of FAW Logistics Co., Ltd., 2006-2011
- Output of, Demand for and Import Volume of Ethylene Glycol in China, 2001-2011
- Flow Direction of Chemicals Logistics in China
- Distribution of Third-party Chemical Storage Tank in China
- Logistics Service Mode and Operation Region of Listed Petrochemical Logistics Companies in China
- Gross Margin Comparison of Storage Business of Major Listed Chemical Storage Companies in China
- Revenue and Net Income of Freetrade Science and Technology, 2008-2011
- Revenue of Freetrade Science and Technology by Business, 2008-2011
- Gross Margin of Freetrade Science and Technology by Business, 2008-2011

- Revenue of Freetrade Science and Technology by Subsidiary, 2011
- Net Income of Freetrade Science and Technology by Subsidiary, 2011
- Name List and Revenue Contribution of Freetrade Science and Technology's Top 5 Clients, 2010
- Name List and Revenue Contribution of Freetrade Science and Technology's Top 5 Clients, 2011
- Revenue and Net Income of Winbase, 2008-2011
- Revenue of Winbase by Business, 2008-2011
- Gross Margin of Winbase by Business, 2008-2011
- Revenue of Winbase by Region, 2008-2011
- Winbase's Revenue from Top 5 Clients and % of Total Revenue, 2008-2011
- Major Rivals of Winbase in Pearl River Delta
- Market Size and Growth Rate of Iron & Steel Logistics in China, 2007-2014E
- Revenue from Storage Business of Europol, 2009-2011
- Storage Area of Europol, 2009-2011
- Revenue from Processing Business of Europol, 2009-2011
- Revenue from Comprehensive Logistics Business of Europol, 2009-2011
- Gross Margin of Europol by Business, 2009-2011
- Fundraising Projects and Investment Amount of Europol
- Operation of Minmetals Logistics, 2009-2011 (Unit: RMB100M)
- Revenue and Net Income of Daqin Railway Co., Ltd., 2005-2011
- Sales and Total Profit of Sinopharm Logistics Co., Ltd., 2007-2011
- IT Logistics Enterprises and Their Service Markets in Yangtze River Delta
- Revenue and Net Income of Jiangsu Feiliks International Logistics Inc., 2008- Q1 2012
- Revenue of Jiangsu Feiliks International Logistics Inc. by Business, 2008-2011
- Gross Margin of Jiangsu Feiliks International Logistics Inc. by Business, 2008-2011

- Revenue of Jiangsu Feiliks International Logistics Inc. by Region, 2008-2011
- Name List and Revenue Contribution of Top 5 Clients of Jiangsu Feiliks International Logistics Inc., 2011
- Revenue and Net Income of New Subsidiaries of Jiangsu Feiliks International Logistics Inc., 2011
- Revenue and Net Income of Xinning Logistics, 2008- Q1 2012
- Revenue of Xinning Logistics by Business, 2008-2011
- Gross Margin of Xinning Logistics by Business, 2008-2011
- Revenue of Xinning Logistics by Region, 2008-2011
- Name List and Revenue Contribution of Xinning Logistics' Top 5 Clients, 2011
- Major Household Appliance Manufacturers and Distributors' Logistics Companies in China
- Revenue of Annto Logistics, 2006-2009
- Revenue Structure of Annto Logistics, 2006-2009



**You can place your order in the following alternative ways:**

1. Order online at [www.researchinchina.com](http://www.researchinchina.com)
2. Fax order sheet to us at fax number: +86 10 82601570
3. Email your order to: [report@researchinchina.com](mailto:report@researchinchina.com)
4. Phone us at +86 10 82600828/ 82601561

<b>Party A:</b>			
Name:			
Address:			
Contact Person:		Tel	
E-mail:		Fax	

<b>Party B:</b>			
Name:	Beijing Waterwood Technologies Co., Ltd (ResearchInChina)		
Address:	Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080		
Contact Person:	Li Chen	Phone:	86-10-82600828
E-mail:	<a href="mailto:report@researchinchina.com">report@researchinchina.com</a>	Fax:	86-10-82601570
Bank details:	Beneficial Name: Beijing Waterwood Technologies Co., Ltd Bank Name: Bank of Communications, Beijing Branch Bank Address: NO.1 jinxiyuan shijicheng, Landianchang, Haidian District, Beijing Bank Account No #: 110060668012015061217 Routing No #: 332906 Bank SWIFT Code: COMMCNSHBJG		

Title	Format	Cost
<i>Total</i>		

**Choose type of format**

- Hard copy .....1,400 USD
- PDF (Single user license) .....1,300 USD
- PDF (Enterprisewide license)..... 2,100 USD

**※ Reports will be dispatched immediately once full payment has been received.**  
**Payment may be made by wire transfer or credit card via Paypal.**