China Express Delivery Industry Report, 2012

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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.

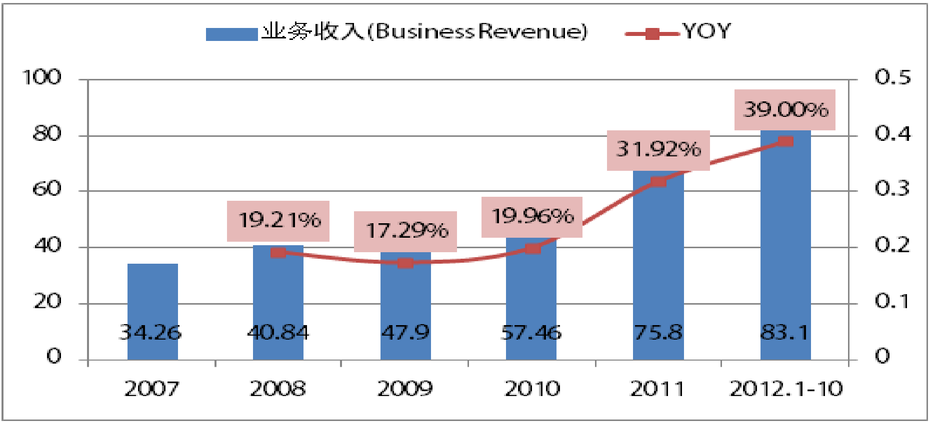
INFORMATION SOURCES

The primary information sources include State Post Bureau of the People's Republic of China, and National Bureau of Statistics of China etc.

Abstract

Although the growth rate of global economy slows down in 2012, Chinese express delivery industry still maintains high-speed development. From January to October of 2012, the business revenue of express delivery companies above designated size accomplished RMB83.1 billion accumulatively, up 39% year-on-year (29.1% in the same period of last year), of which intra-city business revenue rose by 66.3% year-on-year to RMB8.7 billion; inter-city business revenue reached RMB49.73 billion, presenting a YoY rise of 43.5%; and the international and Hong Kong, Macao and Taiwan business revenue increased by 10.6% year-on-year to RMB16.7 billion. The rapid growth of express delivery industry mainly benefits from e-commerce, particularly from fast development of online shopping sector.

Business Revenue of Express Delivery Companies above Designated Size in China, 2007-2012 (Unit: RMB bn)



Source: State Post Bureau of the People's Republic of China; ResearchInChina *China Express Delivery Industry Report, 2012*

Chinese express delivery industry in 2012 characterizes the followings:

First, private enterprises enjoy a rising market share. In the first three quarters of 2012, the business volume and revenue of private express delivery enterprises are both expanding in terms of market share. In particular, the business volume of private express delivery companies accounts for 73.6% of total express delivery business volume, an increase of eight percentage points from the same period of last year; and the business revenue of private express delivery companies holds a share of 58.5% in total express delivery business earnings, a rise of 11.1 percentage points from the same period of last year.

Second, the M&A in the industry or restructuring pricks up market competition. In July, 2012, China Honglou Group merged CCES and established CSL Express; in August, 2012, HNA Group officially divested TTK Express business, and the CEO Xi Chunyang of the original Shanghai Shentong Metro Co., Ltd acquired 60% equities of TTK Express at the price of RMB160 million.

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Third, express delivery and electronic commerce mutually penetrate, and industrial competition tends to be diversified. Currently, a great number of B2C vendors like 360buy, VANCL and Yihaodian.com still makes huge investments for logistics construction in spite of facing capital pressure. Taking 360buy for example, in June, 2012, it obtained the business license for express delivery business. From October 15, 2012 on, 360buy put an end to its cooperation with Shentong Express (STO), and in Nov., 2012, 360buy express opened services to the vendors on the platform.

Since 2012, the leading express delivery companies have made more investments into the e-commercial field but mostly failed in the end. Take example for SF Express, in May, 2012, the e-commercial website sfbest.com under the flagship of SF Express was officially put into services online, targeting at the medium- and high-end food B2C. In September of 2012, sfbest.com's visit flux performed not so well, and its stock turnover also showed a big problem. In October, 2012, sfbest.com kept a low profile and changed the person in chief.
Last, foreign express delivery companies speed up their presence in China. In September of 2012, FedEx Express China Co., Ltd and UPS Parcel Delivery (Guangdong) Co., Ltd got Chinese express delivery business license. In October, 2012, UPS announced to newly open three medical healthcare facilities in Asia-Pacific Region and develop Chinese pharmaceutical logistics market.

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