



**China Express Delivery Industry Report,
2013-2016**

Nov. 2013

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 Company Reports, and National Bureau of Statistics of China etc.

Abstract

Benefiting from the explosive growth of e-commerce, China express delivery industry has maintained rapid growth since 2013. From January to September of 2013, the express delivery enterprises with the annual sales revenue of over RMB20 billion completed the delivery of 6.18 billion mails and parcels, jumping by 61.2% year on year; the revenue totaled RMB99.57 billion, up 34.9% year on year. Wherein, the revenue generated by intra-city business reached RMB11.54 billion, climbing by 49.4% year on year; the inter-city business revenue reached RMB56.64 billion, presenting a year-on-year rise of 28.1%; and the international and Hong Kong, Macao and Taiwan business revenue increased by 30.5% year on year to RMB19.52 billion.

In 2013, China express delivery industry features the followings:

First, the market share of private express delivery companies has kept rising. In the first three quarters of 2013, private express delivery enterprises finished delivering 4.77 billion mails and parcels, representing a year-on-year increase of 69.2%, and the revenue herein hit RMB65.47 billion, up 51.6% year on year, significantly higher than state-owned and foreign enterprises. The workload and revenue of private express delivery companies accounted for 77.2% and 65.8% of the industry respectively, rising by 3.6 and 7.5 percentage points year on year separately.

Development of Foreign Express Delivery Companies in China, 2013

Year	Main Events
May 2013	UPS Hangzhou Healthcare Warehousing Center was officially opened.
Jul 2013	FedEx enhanced its international port operation center in Beijing.
Aug 2013	UPS launched "refrigerated transport" packaging and expanded health care delivery service portfolio in 13 markets including Mainland China.
Aug 2013	UPS opened two contract logistics and warehousing centers in Chengdu and Shanghai to expand its logistics network in China.
Nov 2013	TNT announced the formal completion of the sale of TNT Hoau and it will continue to develop its international express delivery business in China.

Source: UPS, FedEx, TNT; ResearchInChina

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Second, express delivery companies have started to tap into the aviation system. Following SF Express and China Post, YTO Express and STO have also submitted application to the Civil Aviation Administration in 2013 and may obtain the approval as soon as the end of the year.

Third, foreign enterprises have changed the layout strategy in China. UPS targets high profitable market segments; FedEx has unveiled a new port operation center to accelerate the operating speed of international express mails; and TNT has turned to focus on cross-border express delivery.

Fourth, VC / PE has accelerated the access to the express delivery industry. In early 2013, Leading Capital, Pengkang Investment and Phoenix Capital invested RMB200 million in Quanfeng Express; in May, Sequoia Capital China became a shareholder of ZTO Express with the injection of USD30 million; during late August, the private express delivery giant SF Express announced its first financing within the recent two years.

As for IPO, China Postal Express & Logistics Company Limited (EMS), YTO Express, ZJS Express, ZTO Express, YUNDA Express and a number of other express delivery companies are keeping low profiles and planning for IPO.

The report highlights the following aspects:

- ✘ Regulations, policies and "Twelfth Five-Year" Development Plan for the express delivery industry;
- ✘ Workload, revenue, regional operation, and business complaints of China express delivery industry;
- ✘ Competition patterns between express delivery enterprises in China, including the overall pattern, the development of private enterprises, layout of foreign players in China, the relationship between e-commerce and express delivery;
- ✘ The development of the express delivery industry in major provinces and cities of China, embracing regional competition patterns and express delivery business operation of 10 major provinces and cities;
- ✘ Profile, financial data, operational data and business in China of four foreign companies (UPS, FedEx, TNT and DHL);
- ✘ Profile, express delivery business and operation of three Chinese state-owned express delivery companies (China Postal Express & Logistics Company Limited, China Railway Express and China Air Express);
- ✘ Profile, operational data, and express delivery business of 14 Chinese private express delivery companies.

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