

China Express Delivery Industry Report, 2016

Sep. 2016

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

Thanks to the rapid growth in e-commerce industry, the online shopping habits of the Chinese consumers have been gradually developed and deepened. In 2015, the online shopping market sales reached RMB3.8 trillion in 2015, with a CAGR of 50% over the past five years, thus driving a surge in express delivery industry.

In 2015, China's express delivery business volume totaled 20.67 billion pieces, up 48% from a year earlier, with a CAGR of 54.6% over the past five years; express delivery revenue came to RMB276.96 billion, up 35.4% from a year earlier, registering a CAGR of 37.0% over the past five years. In H1 2016, the business volume of Chinese express delivery firms reached 13.25 billion pieces, up 56.7% from the same period of last year; the business revenue totaled RMB171.46 billion, a year-on-year growth rate of 43.4%. In the first half of 2016, express delivery revenue saw a rising proportion of up to 69.3% in the postal service industry revenue.

Regionally, eastern China constitutes the mainstay of the express delivery industry, with the business volume accounting for as high as 82%, and central and western China 11.2% and 6.8%, respectively. By provinces/municipalities, the top 5 ones in terms of express delivery business are respectively Guangdong, Zhejiang, Jiangsu, Shanghai, and Beijing, all of which hold a combined share of 69% in the total business volume. The top 5 provinces/municipalities by express delivery revenue are Guangdong, Shanghai, Zhejiang, Jiangsu, and Beijing, sweeping an aggregate of 69.6% of the express delivery revenue.

In terms of competitive landscape, competition between major players picks up, including EMS, SF Express, STO, YTO, ZTO, and Yunda. In 2015, China's express delivery market concentration continued to fall, with the top 8 companies by revenue accounting for a combined 77.3% of the total nationwide, and the top four 50.4%. The two rates slid 0.6 percentage point, respectively, compared with a year ago. The decline in industry concentration reflects fiercer competition in China's express delivery market.

With the intensifying competition in express delivery industry, major companies are beginning to increase capital to cope with challenges. In 2016, the major four private express delivery firms (SF Express, STO Express, YTO Express, and Yunda Express) happened to venture into capital market through back-door listing. Moreover, it is rumored from time to time that ZTO might go public in the United States. In 2015, after completing the fourth round of financing, Quanfeng Express seeks to be listed in the main board and National Equities Exchange and Quotations (NEEQ). Additionally, some enterprises jumpstarted financing process, with TTK Express completing the first two rounds of financing of footing up to over RMB1.5 billion in February and August 2016. Fast Express obtained the first round of financing of RMB250 million in May 2016.

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Reverse Merger Schemes of Four Major Delivery Express Enterprises, 2016

Acquiring Company	Shell Company	Proposed Exchange-I n Assets	Loan Borrowing Methods	Overall Valuation
STO Express	IDC Fluid Control (002468)	STO: 100% equities	STO acquired the assets of the original company for RMB726 million; IDC issued 906 million shares at RMB16.44 per share and raised RMB14.9 billion, and paid RMB2 billion in cash for a 100% equity in STO; STO issued shares to raise funds of RMB4.8 billion.	RMB16.9 billion
YTO Express	Dalian Dayang Trands (600233)	YTO: 100% equities	YTO acquired the assets of the original company for RMB1.234 billion; By issuing 2.269 billion shares at RMB7.72 per share (after going ex-rights and ex-dividend), Dayang Trands put a total of RMB17.5 billion to purchase of 100% equities in YTO. YTO raised funds of RMB2.3 billion through private placement of shares at RMB10.25 per share.	RMB17.5 billion
SF Express	Dingtai Rare Earth & New Materials (002352)	SF Express: 100% equities	SF Express acquired the assets of the original company for RMB810 million; Dingtai issued 3.95 billion shares at RMB10.76 per share, and paid RMB42.5 billion for a 100% equity in SF Express ; SF Express raised funds of RMB8 billion by issuing shares at RMB11.03 per share.	RMB43.3 billion
Yunda Express	Ningbo Xinhai Electric (002120)	Yunda Express: 100% equities	Yunda acquired the assets of the original company for RMB661 million; Ningbo Xinhai Electric issued 876 million shares at RMB19.79 per share, and paid RMB18 billion for a 100% equity in Yunda Express ; Yunda raised funds of RMB8 billion by issuing shares at RMB11.03 per share.	RMB18 billion

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The report highlights the followings:

- ➔ Overview of the Chinese express delivery industry, including definition and classification, industry chain, as well as industrial policy and development trends;
- ➔ Overall market size of the Chinese express delivery industry, involving business volume, revenue, business structure, service capability, and future trends, etc.
- ➔ Competitive landscape of the Chinese express delivery industry, including market concentration, business model contrast, and financing and M&A;
- ➔ Regional analysis of the Chinese express delivery industry, including regional competition, and analysis of 12 markets including Guangdong, Shanghai, and Zhejiang;
- ➔ Profile, financial situation, service facilities, service network, and financing of 19 domestic and foreign enterprises including FedEx, DHL, UPS, EMS, China Railway Express, China Air Express, SF Express, STO, YTO, and Yunda.

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