



**Global and China Third-party Logistics  
Industry Report, 2016-2020**

**Feb.2017**

## **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

Third-party logistics can not only help companies complete cargo movement but effectively reduce logistics costs and speed up cargo turnover, fully meeting their requirements on logistics quality. Therefore, third-party logistics develops rapidly. In 2015, global third-party logistics market size hit USD721 billion, a YoY rise of 4.5%, occupying 8.2% of the logistics market size, and increased around USD35.9 billion in 2016, up to USD756.9 billion. In the future, by virtue of high efficiency and highly standardized operation, the third-party logistics market size will grow steadily, expectedly outstripping USD900 billion in 2020, with a share of nearly 10.0% in the logistics market size.

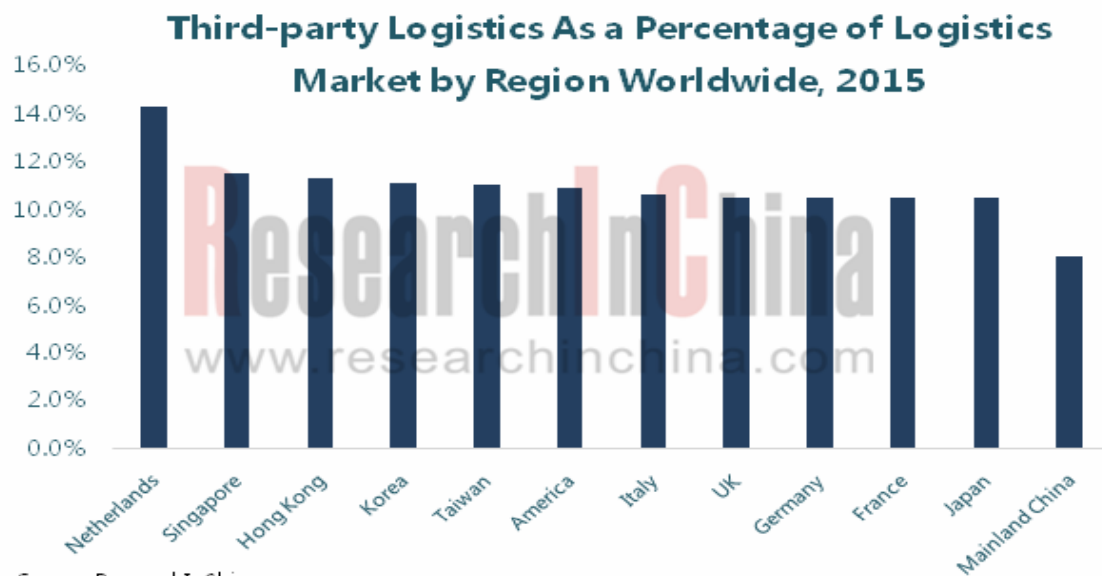
China is the world largest third-party logistics market. In 2015, its market size attained RMB1,065.2 billion or roughly USD171.8 billion (up 13.6% year on year), a 23.8% share in global market, and reached around RMB1,200 billion in 2016. Chinese (Mainland China) third-party logistics industry is still in its infancy, and lags behind the developed countries/regions by share in the whole logistic market (developed regions generally above 10.5%, Mainland China around 8.0%), leaving a large development space. Moreover, China's regional trade imbalance also creates certain opportunities for the rapid development of third-party logistics. It is predicted that third-party logistics market size in China will see a CAGR of around 15.0% in 2016-2020.

Additionally with not a high market share, Chinese third-party logistics industry also has problems of insufficient demand and low-level demand at present, respectively due to relatively little use of third-party logistics by most traditional companies, and basic and conventional demand of companies which choose third-party logistics and their small demand for high value-added, comprehensive logistics service. Development trend: to improve profitability and maximize operational efficiency, third-party logistics is heading towards largescale, informatization, asset-light and platform. In addition, as E-commerce in China gradually spreads to regions outside the first tier cities, third-party logistics companies make layout in the second- and third-tier cities accordingly.

Seen from competitive landscape, third-party logistics market has a low concentration rate, and the players compete fiercely. In 2015, CR10 of global third-party logistics industry was less than 20.0%, of which DHL Supply Chain & Global Forwarding with the largest market size only saw 4.1%; Sinotrans, China's largest third-party logistics company, ranking eighth in the world, only witnessed a market share of 1.0%.

The report highlights the following:

- ◆ Overview of third-party logistics, including definition, classification, industry characteristics, industry chain, etc.;
- ◆ Overview of global and Chinese logistics industry, including development overview, operation mode, market status, industry characteristics, development trend, etc.;
- ◆ Overview of global third-party logistics, including development situation, market size, market structure, competitive pattern, etc.;
- ◆ Overview of Chinese third-party logistics, including development overview, development environment, market size, market structure, competitive pattern, problems, development trend, etc.;
- ◆ Overview of third-party logistics market segments like automotive and pharmaceutical, including market size, status quo, etc.;
- ◆ Development of infrastructure (highway, railway, water carriage, aviation), transportation equipment (truck, railway wagon, etc.) and other intelligent logistics equipment;
- ◆ Overview of 13 foreign, 9 Chinese third-party logistics companies, including operation, third-party logistics layout, etc..



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- 1.2 Classification
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- 1.5 Industry Chain

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