

China Same Day Delivery - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2030)

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Abstracts

The China Same Day Delivery Market size is estimated at 30.18 billion USD in 2024, and is expected to reach 49.08 billion USD by 2030, growing at a CAGR of 8.44% during the forecast period (2024-2030).

Established networks to meet the increasing demand for same day deliveries are driving the growth of the segment

In 2022, the total volume of express deliveries, which also majorly include same day deliveries, accounted for about 80% of the total volume of the postal industry's delivery business, with the majority being same day deliveries. The cumulative revenue from express deliveries also increased by 2.3% YoY in 2022 due to recurring lockdowns, which increased demand for quick and same day deliveries, specifically for essential goods. Also, in 2022, the eastern, central, and western areas accounted for 76.8%, 15.7%, and 7.5% of the total volume of express delivery business, respectively. In alignment with this increasing demand, Cainiao Network, the logistics network of China's Alibaba Group Holding Ltd launched half-day express delivery service in Beijing in 2023.

Major cross-border e-commerce platforms in China are TMall Global & Kaola, JD Worldwide (Jd.com's cross-border e-commerce platform), and Vipshop, accounting for 80% of the cross-border e-commerce traffic. Of this, Alibaba-owned overseas shopping e-commerce platforms like TMall Global & Kaola provide same day deliveries, and they captured 60% of China's cross-border import online retail market as of 2021. JD.com

delivers approximately 90% of orders on the same or next day via a network of its 1,500 warehouses that include small to medium-sized and cross-border warehouses.

The government aims to establish a more pragmatic logistics network by 2035, specifically for domestic and international same day and express deliveries. Deliveries of packages via this network aim to take one day in China, two days to customers in adjacent nations, and three days to major cities worldwide. For this, 80 logistical hubs are expected to be operational to manage local and international express mail deliveries by 2035.

China Same Day Delivery Market Trends

E-commerce logistics flourished in China, with the index rising to 104.3 points in 2022, fueling industry supply chain

China is the world's largest logistics market, propelled by favorable logistics prospects and strong business fundamentals. The Chinese government allocated a significant investment of CNY 181.6 billion (USD 24.94 billion) in 2021 toward the logistics sector. This substantial backing has translated into a doubled market value for China's logistics industry, soaring beyond CNY 335 trillion (USD 46.02 trillion) in 2021. This expansion is intricately tied to the thriving domestic and cross-border e-commerce activities currently surging in the country.

E-commerce logistics in China experienced a rebound in May 2022, with the index increasing by 2.1 points to 104.3 from April. This improvement was driven by various policies implemented by China, including efforts to eliminate transportation bottlenecks and ease the operational challenges faced by logistics companies. Shanghai, in particular, initiated an action plan aimed at accelerating economic recovery. The plan includes measures to stabilize industrial and supply chains in the Yangtze River Delta region and enhance the efficiency of domestic and international logistics and transportation networks.

The transportation and storage sector in China experienced a significant decrease in YoY growth, dropping from 19.32% in 2021 to 2.58% in 2022. This decline was primarily attributed to a 40% reduction in China's manufacturing orders, which had a notable impact on the demand for transportation and storage services. Therefore, China has prioritized enhancing transportation and logistics to maintain business operations and

economic stability, with the Industrial and Commercial Bank of China's Shandong branch disbursing over USD 1.19 billion in loans to support the logistics sector in 2022.

Crude oil demand in China was expected to decline slightly owing to strong demand for EVs in 2023

China's retail diesel and gasoline prices are set to soar to historically high levels following a surge in global crude oil benchmarks amid the Russia-Ukraine War. Under China's pricing system, retail fuel prices are assessed every ten working days to reflect global crude oil benchmarks if the benchmark prices move between USD 40 and USD 130. Outside that band, retail prices do not change or only move marginally. Chinese oil refiners, both state-backed and independent, are lowering operational rates to cope with high oil prices and ebbing fuel demand in the country due to the mobility restrictions during the COVID-19 pandemic.

Unlike Japan and South Korea, both looking for ways to battle runaway oil prices via subsidies and tax cuts, China raised its ceiling prices for gasoil and gasoline in keeping with its domestic oil pricing mechanism. It has no plans to lower consumption tax as consumers shrug off higher transportation fuel costs. The National Development and Reform Commission raised the country's ceiling retail price for gasoline and gasoil by USD 31.3 per ton and USD 29.84 per ton, respectively, in 2022. China's 2023 crude oil demand is expected to grow less than expected, as strong demand for electric vehicles weighs on gasoline demand.

China is unlikely to reduce the consumption tax on gasoline and gasoil during its net-zero journey. Operational rates in Shandong province, China's oil refining hub, fell to a two-year low of 57.09%. China's daily oil throughput in the first two months of 2022 fell to its lowest since December 2020. Oil prices rose in the first half of 2022 due to a fear caused by Russia's invasion of Ukraine and concerns that sanctions against Russia would lead to shortages.

China Same Day Delivery Industry Overview

The China Same Day Delivery Market is fragmented, with the top five companies occupying 34.69%. The major players in this market are China Post, SF Express (KEX-

SF), YTO Express, Yunda Express and ZTO Express (sorted alphabetically).

Additional Benefits:

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