# China Express Delivery Industry Report, 2015

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## Abstracts

In 2014, China surpassed the United States to become the world's largest express delivery country for the first time in terms of workload. Since 2015, the industry has continued to maintain a rapid growth trend. From January to May of 2015, Chinese express delivery enterprises completed the delivery of 6.81 billion mails and parcels, jumping by 42.7% year on year; the revenue footed up to RMB96.95 billion, up 31.9% year on year. Wherein, the revenue generated by intra-city business reached RMB13.63 billion, climbing by 51.1% year on year; the inter-city business revenue hit RMB53.29 billion, presenting a year-on-year rise of 30.2%; the revenue from the business with foreign countries, Hong Kong, Macao and Taiwan increased by 17.5% year on year to RMB14.04 billion.

Since 2014, China express delivery industry has been featured as follows:

First, the express delivery market competition has picked up with the expanding workload. The workload proportion of top four express delivery enterprises in the national workload slumped from 70.3% in 2010 to 49.9% in 2014, marking the first decline to below 50%; their revenue contribution descended from 68.5% in 2010 to 51.0% in 2014.

Second, the market share of private express delivery firms has kept rising. In 2014, private express delivery enterprises finished delivering 11.95 billion mails and parcels, representing a year-on-year increase of 64.83%; and the revenue herein hit RMB154.1 billion, soaring 58.25% year on year. The workload and revenue of private express delivery firms accounted for 85.6% and 75.3% of the industry respectively, rising by 6.62 and 7.75 percentage points year on year separately.

Third, major domestic express delivery enterprises have planned to step in the cross-border e-commerce field to expand their business scope and raise revenue.

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Fourth, foreign express delivery companies have been more cautious about their layout in China. In September 2014, the Chinese government announced the full liberalization of the domestic parcel express delivery market and issued business licenses to qualified foreign express delivery companies in accordance with the approved business scope and areas. However, most foreign express delivery enterprises claim that China's domestic express delivery market is immature and still stays at the 'price war' phase, so they will continue to focus on the international express delivery business in China.

The report highlights the following aspects:

- Policies, market size, market structure, service capability and business complaints of China express delivery industry;
- Competition between express delivery enterprises in China, including the overall pattern, the development of private enterprises, the layout of foreign players in China, the relationship between e-commerce and express delivery;
- The development of express delivery industry in major provinces and cities of China, embracing regional competition 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, express delivery business and future development plans of 14 Chinese private express delivery companies.

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**4. DEVELOPMENT OF EXPRESS DELIVERY INDUSTRY IN CHINA'S MAJOR PROVINCES (MUNICIPALITIES)**

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