

China Express Delivery Industry Report, 2015

<https://marketpublishers.com/r/C39C4E1BA47EN.html>

Date: July 2015

Pages: 165

Price: US\$ 2,500.00 (Single User License)

ID: C39C4E1BA47EN

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 pricked 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.

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.

Contents

PREFACE

1. OUTLINE OF CHINA'S EXPRESS DELIVERY INDUSTRY AND ITS DEVELOPMENT PLAN

- 1.1 Definition of Express Delivery Industry
 - 1.1.1 Definition of Express Delivery Services
 - 1.1.2 General Principles of Express Delivery Services
- 1.2 Laws & Regulations and Policies
- 1.3 The Twelfth Five-Year Plan of Express Delivery Industry
 - 1.3.1 Development Goals
 - 1.3.2 Major Tasks

2. DEVELOPMENT OF CHINA'S EXPRESS DELIVERY INDUSTRY

- 2.1 Proportion of Express Delivery in Postal Industry
- 2.2 Market Size
 - 2.2.1 Business Volume
 - 2.2.2 Business Revenue
 - 2.2.3 Price
- 2.3 Market Structure
 - 2.3.1 Regional Structure
 - 2.3.2 Business Structure
- 2.4 Service Capability
 - 2.4.1 Construction of Basic Facility
 - 2.4.2 Construction of Express Delivery Parks
 - 2.4.3 Construction of End Network
- 2.5 Complaints about China Express Delivery Industry
 - 2.5.1 Types of Complaints
 - 2.5.2 Customer Complaints about China Express Delivery Enterprises

3. COMPETITION AMONG ENTERPRISES IN CHINA

- 3.1 Competition Overview
 - 3.1.1 Competitive Subject
 - 3.1.2 Concentration Ratio
- 3.2 Status Quo of Private Enterprises

- 3.2.1 Expanding of Market Share
- 3.2.2 Vigorous Development of Cross-border E-commerce
- 3.3 Foreign Companies' Development in China
- 3.4 M&A and Financing
- 3.5 Logistics Layout of E-commerce Firms

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

- 4.1 Regional Competition
- 4.2 Guangdong
 - 4.2.1 Market Size
 - 4.2.2 Business Structure
 - 4.2.3 Regional Structure
 - 4.2.4 Competitive Subject
 - 4.2.5 Service Capability
 - 4.2.6 The Twelfth Five-Year Plan
- 4.3 Zhejiang
 - 4.3.1 Market Size
 - 4.3.2 Business Structure
 - 4.3.3 Regional Structure
 - 4.3.4 Competitive Subject
 - 4.3.5 Service Capability
 - 4.3.6 The Twelfth Five-Year Plan
- 4.4 Jiangsu
 - 4.4.1 Market Size
 - 4.4.2 Business Structure
 - 4.4.3 Regional Structure
 - 4.4.4 Competitive Subject
 - 4.4.5 Service Capability
 - 4.4.6 The Twelfth Five-Year Plan
- 4.5 Shanghai
 - 4.5.1 Market Size
 - 4.5.2 Business Structure
 - 4.5.3 Regional Structure
 - 4.5.4 Competitive Subject
 - 4.5.5 Service Capability
 - 4.5.6 The Twelfth Five-Year Plan
- 4.6 Beijing

- 4.6.1 Market Size
- 4.6.2 Business Structure
- 4.6.3 Competitive Subject
- 4.6.4 Service Capability
- 4.6.5 The Twelfth Five-Year Plan
- 4.7 Fujian
 - 4.7.1 Market Size
 - 4.7.2 Business Structure
 - 4.7.3 Regional Structure
 - 4.7.4 Competitive Subject
 - 4.7.5 Service Capability
 - 4.7.6 The Twelfth Five-Year Plan
- 4.8 Shandong
 - 4.8.1 Market Size
 - 4.8.2 Regional Structure
 - 4.8.3 Competitive Subject
 - 4.8.4 The Twelfth Five-Year Plan
- 4.9 Sichuan
 - 4.9.1 Market Size
 - 4.9.2 Business Structure
 - 4.9.3 Service Capability
 - 4.9.4 The Twelfth Five-Year Plan
- 4.10 Hubei
 - 4.10.1 Market Size
 - 4.10.2 Business Structure
 - 4.10.3 Regional Structure
 - 4.10.4 Service Capability
 - 4.10.5 The Twelfth Five-Year Plan
- 4.11 Hebei
 - 4.11.1 Market Size
 - 4.11.2 Business Structure
 - 4.11.3 Regional Structure
 - 4.11.4 Competitive Subject
 - 4.11.5 Service Capability
 - 4.11.6 The Twelfth Five-Year Plan

5. FOREIGN EXPRESS DELIVERY COMPANIES IN CHINA

5.1 UPS

- 5.1.1 Profile
- 5.1.2 Operation
- 5.1.3 Operating Data
- 5.1.4 Development in China
- 5.1.5 Expanding Service Scale of Worldwide Express Freight Business
- 5.1.6 Opening Rail Freight between China and Europe
- 5.2 FedEx
 - 5.2.1 Profile
 - 5.2.2 Operation
 - 5.2.3 Operating Data
 - 5.2.4 FedEx and TNT Express Agree on Recommended All-Cash Public Offer for All TNT Express Shares
 - 5.2.5 Development in China
- 5.3 DHL
 - 5.3.1 Profile
 - 5.3.2 Operation
 - 5.3.3 DHL China
- 5.4 TNT
 - 5.4.1 Profile
 - 5.4.2 Operation
 - 5.4.3 Operating Data
 - 5.4.4 Development in China

6. STATE-OWNED EXPRESS DELIVERY COMPANIES IN CHINA

- 6.1 EMS
 - 6.1.1 Profile
 - 6.1.2 Development Course
 - 6.1.3 Listing Process
- 6.2 CRE
 - 6.2.1 Profile
 - 6.2.2 Development Course
 - 6.2.3 Partner
- 6.3 CAE
 - 6.3.1 Profile
 - 6.3.2 Business System
 - 6.3.3 Dynamics

7. PRIVATE-OWNED EXPRESS DELIVERY ENTERPRISES IN CHINA

7.1 SF-Express

7.1.1 Profile

7.1.2 Development Course

7.1.3 Business Platforms

7.1.4 Operation

7.1.5 Competitive Edges

7.1.6 Establishment of Shenzhen Fengchao Technology Co., Ltd.

7.1.7 Layout in Internet Finance Business

7.2 STO

7.2.1 Profile

7.2.2 Development Course

7.2.3 Strategic Cooperation

7.3 ZJS Express

7.3.1 Profile

7.3.2 Development Course

7.3.3 Cross-border Business

7.3.4 Financing

7.3.5 Strategy

7.4 YTO Express

7.4.1 Profile

7.4.2 Business Platforms

7.4.3 Development Course

7.4.4 Strategic Joining of Alibaba

7.5 YUNDA Express

7.5.1 Profile

7.5.2 Development Course

7.5.3 Establishment of New Zealand Service Center

7.5.4 Cooperation with Convenience Stores

7.6 ZTO Express

7.6.1 Profile

7.6.2 Development Course

7.6.3 Cross-border Business

7.6.4 Financing

7.7 TTK Express

7.8 Best Express

7.8.1 Profile

7.8.2 Development Course

7.9 GTO Express

- 7.9.1 Profile
- 7.9.2 Investing RMB150 million in Construction of Jinhua Transfer Center
- 7.10 UC Express
 - 7.10.1 Profile
 - 7.10.2 Development Course
- 7.11 SURE
 - 7.11.1 Profile
 - 7.11.2 Development Course
- 7.12 Fast Express
- 7.13 Quanfeng Express
 - 7.13.1 Profile
 - 7.13.2 Partners
 - 7.13.3 Financing
- 7.14 A Plus Express

8. MARKET SUMMARY AND DEVELOPMENT FORECAST

- 8.1 Market Summary
- 8.2 Development Forecast
 - 8.2.1 Drivers
 - 8.2.2 Trends
 - 8.2.3 Industry Data Forecast

Selected Charts

SELECTED CHARTS

General Principles of Express Delivery Services

Laws & Regulations and Policies concerning China's Express Delivery Industry, 2009-2015

China's Main Express Service Capability Construction Projects during the Twelfth Five-Year Plan (2011-2015)

Airline Network Planning Graph of China Express Delivery Industry

Express Delivery as Percent of Business Revenue of Postal Industry, 2008-2015

Business Volume and YoY Change of Express Delivery Companies in China, 2007-2015

Average Daily and Daily High Delivery Volume of Express Delivery Companies in China, 2010-2014

Monthly Business Volume of Express Delivery Companies in China, 2014-2015

Business Revenue and YoY Change of Express Delivery Companies in China, 2007-2015

Express Delivery Depth in China, 2010-2014

Monthly Business Revenue of Express Delivery Companies in China, 2014-2015

Average Unit Price of Express Delivery in China, 2010-2015

Regional Structure of Business Volume of Express Delivery in China, 2008-2015

Regional Structure of Business Revenue of Express Delivery in China, 2008-2015

Business Volume Structure of Express Delivery in China (by Key Regions), 2014

Business Revenue Structure of Express Delivery in China (by Key Regions), 2014

Business Volume Structure of Express Delivery (by Business Types), 2010-2015

Business Revenue Structure of Express Delivery (by Business Types), 2010-2015

Express Delivery Vehicles in China, 2010-2014

Area Density of Express Delivery Outlets in China, 2010-2014

Population Density of Express Delivery Outlets in China, 2010-2014

Expense and Usage of Express Delivery per Capita in China, 2008-2014

Monthly Effective Customer Complaints about China Express Delivery Industry, 2014-2015

Types and Proportion of Consumer Complaints about Express Delivery Industry, May 2015

Ratio of Complaints about Major Express Delivery Enterprises in China, May 2015

Business Volume and Revenue of Express Delivery Companies in China, 2011-2014

Market Share of Express Delivery Enterprises (by Business Volume), 2014

Market Share of Express Delivery Enterprises (by Business Revenue), 2014

Express Delivery Market Concentration in China (by Business Volume), 2010-2014
Express Delivery Market Concentration in China (by Business Revenue), 2010-2014
Private Express Delivery Enterprises' Layout in Cross-border Business in China, 2015
Development of Foreign Express Delivery Enterprises in China
M&A and Financing Cases in Chinese Express Delivery Industry, 2009-2015
Logistics System of TOP6 E-commerce Firms in China
Business Volume and Revenue of Express Delivery Companies (Each with Annual Revenue of over RMB20 Million) in China (by Regions), Jan.-May., 2015
TOP10 Cities in China Express Delivery Market (by Business Volume), Jan.-May., 2015
TOP10 Cities in China Express Delivery Market (by Business Revenue), Jan.-May., 2015
Business Volume and YoY Change of Express Delivery Companies in Guangdong, 2008-2015
Business Revenue and YoY Change of Express Delivery Companies in Guangdong, 2008-2015
Business Volume Structure of Express Delivery in Guangdong (by Business Types), Jan.-May., 2015
Business Revenue Structure of Express Delivery in Guangdong (by Business Types), 2014
Business Volume and Revenue of Express Delivery Companies in China (by Regions), Jan.-May., 2015
Business Volume and Revenue of Express Delivery Companies in Guangdong (by Cities), Jan.-May., 2015
Business Volume Structure of Express Delivery in Guangdong (by Enterprise Nature), 2014
Business Revenue Structure of Express Delivery in Guangdong (by Enterprise Nature), 2014
Expense and Usage of Express Delivery per capita in Guangdong, 2010-2014
Business Volume and YoY Change of Express Delivery Companies in Zhejiang, 2009-2015
Business Revenue and YoY Change of Express Delivery Companies in Zhejiang, 2009-2015
Business Volume of Express Delivery in Zhejiang (by Business Types), Jan.-May., 2015
Business Revenue of Express Delivery in Zhejiang (by Business Types), Jan.-May., 2015
Business Volume and Revenue of Express Delivery Companies in Zhejiang (by Cities), Jan.-May., 2015
Business Volume Structure of Express Delivery in Zhejiang (by Enterprise Nature), 2014

Business Revenue Structure of Express Delivery in Zhejiang (by Enterprise Nature), 2014

Development Goals of Express Delivery Industry in Zhejiang during the Twelfth Five-Year Plan

Business Volume and YoY Change of Express Delivery Companies in Jiangsu, 2010-2015

Business Revenue and YoY Change of Express Delivery Companies in Jiangsu, 2010-2015

Business Revenue of Express Delivery in Jiangsu (by Business Types), Jan.-May., 2015

Business Volume of Express Delivery in Jiangsu (by Business Types), Jan.-May., 2015

Business Volume and Revenue of Express Delivery Companies in Jiangsu (by Cities), Jan.-May., 2015

Business Volume Structure of Express Delivery in Jiangsu (by Enterprise Nature), 2014

Business Revenue Structure of Express Delivery in Jiangsu (by Enterprise Nature), 2014

Expense and Usage of Express Delivery per capita in Jiangsu, 2010-2014

Development Goals of Postal Industry in Jiangsu during the Twelfth Five-Year Plan

Business Volume and YoY Change of Express Delivery Companies in Shanghai, 2008-2015

Business Revenue and YoY Change of Express Delivery Companies in Shanghai, 2008-2015

Business Volume Structure of Express Delivery in Shanghai (by Business Types), Jan.-May., 2015

Business Revenue Structure of Express Delivery in Shanghai (by Business Types), Jan.-May., 2015

Business Volume and Revenue of Express Delivery Companies in Shanghai (by Regions), Jan.-May., 2015

Business Volume Structure of Express Delivery in Shanghai (by Enterprise Nature), 2014

Business Revenue Structure of Express Delivery in Shanghai (by Enterprise Nature), 2014

Expense and Usage of Express Delivery per Capita in Shanghai, 2008-2014

Business Volume and YoY Change of Express Delivery Companies in Beijing, 2010-2015

Business Revenue and YoY Change of Express Delivery Companies in Beijing, 2010-2015

Business Volume Structure of Express Delivery in Beijing (by Business Types), Jan.-May., 2015

Business Revenue Structure of Express Delivery in Beijing (by Business Types), Jan.-May., 2015

Business Volume Structure of Express Delivery in Beijing (by Enterprise Nature), 2014

Business Revenue Structure of Express Delivery in Beijing (by Enterprise Nature), 2014

Business Volume and YoY Change of Express Delivery Companies in Fujian, 2010-2015

Business Revenue and YoY Change of Express Delivery Companies in Fujian, 2010-2015

Business Volume Structure of Express Delivery in Fujian (by Business Types), 2014

Business Revenue Structure of Express Delivery in Fujian (by Business Types), 2014

Business Volume and Revenue of Express Delivery Companies in Fujian (by Regions), Jan.-May., 2015

Business Volume Structure of Express Delivery in Fujian (by Enterprise Nature), 2014

Business Revenue Structure of Express Delivery in Fujian (by Enterprise Nature), 2014

Business Volume and YoY Change of Express Delivery Companies in Shandong, 2012-2015

Business Revenue and YoY Change of Express Delivery Companies in Shandong, 2010-2015

Business Revenue of Express Delivery Companies in Guangdong (by Regions), 2014

Business Volume Structure of Express Delivery in Shandong (by Enterprise Nature), 2014

Business Revenue Structure of Express Delivery in Shandong (by Enterprise Nature), 2014

Business Volume and YoY Change of Express Delivery Companies in Sichuan, 2011-2015

Business Revenue and YoY Change of Express Delivery Companies in Sichuan, 2011-2015

Business Volume and Revenue Structure of Express Delivery in Sichuan (by Business Types), Jan.-May., 2015

Expense and Usage of Express Delivery per Capita in Sichuan, 2011-2014

Business Volume and YoY Change of Express Delivery Companies in Hubei, 2011-2015

Business Revenue and YoY Change of Express Delivery Companies in Hubei, 2011-2015

Business Volume Structure of Express Delivery in Hubei (by Business Types), Jan.-May., 2015

Business Revenue Structure of Express Delivery in Hubei (by Business Types), Jan.-May., 2015

Business Volume of Express Delivery Companies in Hubei (by Regions), 2014

Business Revenue of Express Delivery Companies in Hubei (by Regions), 2014
Business Volume and YoY Change of Express Delivery Companies in Hebei, 2010-2015
Business Revenue and YoY Change of Express Delivery Companies in Hebei, 2010-2015
Business Volume Structure of Express Delivery in Hebei (by Business Types), Jan.-May., 2015
Business Revenue Structure of Express Delivery in Hebei (by Business Types), Jan.-May., 2015?
Business Volume and Revenue of Express Delivery Companies in Hebei (by Regions), Jan.-May., 2015
Business Volume Structure of Express Delivery in Hebei (by Enterprise Nature), 2014
Business Revenue Structure of Express Delivery in Hebei (by Enterprise Nature), 2014
Profile of UPS (as of December, 2014)
Revenue and Net Income of UPS, 2008-2015
Revenue Structure of UPS (by Sectors), 2009-2015
Average Daily Package Volume of UPS, 2009-2015
Fleet of UPS (as of Q1, 2015)
UPS Asia Region Snapshot
Development Course of UPS in China
Business Units of FedEx
Revenue and Net Income of FedEx, FY2010-FY2015
Revenue Breakdown of FedEx (by Regions), FY2010-FY2015
Operating Data of FedEx Express, FY2013-FY2015
FedEx Express Aircraft and Vehicle Fleet Statistics, FY2013-FY2021
Operating Data of FedEx Ground, FY2013-FY2015
Operating Data of FedEx Freight, FY2013-FY2015
Development Course of FedEx in China
DHL Presence in Global Airports
Global Business Distribution of Deutsche Post DHL
Main Operating Indicators of Deutsche Post DHL, 2013-2015
Revenue Breakdown of Deutsche Post DHL (by Regions), 2014-2015
Operating Indices Breakdown of Deutsche Post DHL (by Sectors), 2014-2015
Development Course of DHL in China
Revenue and Profit of TNT, 2010-2015
Operating Indices Breakdown of TNT (by Regions), 2014-2015
Operating Data of TNT, 2013-2014
Operating Data of TNT, 2014-2015
Development Course of TNT in China

Net Sales of TNT (by Regions), 2013-2014
Profile of EMS (as of 2014)
Organization of EMS
Development Course of EMS
Profile of CRE (as of 2014)
Development Course of CRE
Partners of CRE
Business System of CAE
Profile of SF-Express (by End of December, 2014)
Development Course of SF-Express
Development Course of SFBest
Service Network of SF-Express
Revenue of SF-Express, 2005-2014
Profile of STO (by End of December, 2014)
Development Course of STO
Profile of ZJS Express (by End of June, 2015)
Development Course of ZJS Express
Profile of YTO Express (by End of June, 2015)
Development Course of YTO Express
Profile of YUNDA Express (by End of December, 2014)
Express Delivery Business of YUNDA Express
Development Course of YUNDA Express
YUNDA Express's Cooperation with Convenience Stores, 2014-2015
Development Course of ZTO Express
Profile of TTK Express (by End of December, 2014)
Distribution Network of Best Express
Development Course of Best Express
Development Course of UC Express
Development Course of Sure
Development Course of Fast Express
Partners of Quanfeng Express
Transaction Volume and YoY Growth of E-commerce Market in China, 2011-2015
Structure of Express Delivery Consumption in the Middle Class in the World
Business Volume of Express Delivery Companies in China, 2015E-2018E
Business Revenue of Express Delivery Companies in China, 2015E-2018E

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