

# China General Cargo Logistics Industry Report, 2011-2012

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## Abstracts

In China, the logistic cost is increasing these years. In 2007, the gross external logistic cost of China broke RMB4 trillion, while the figure in 2009 hit RMB6 trillion. In 2011, China's external logistic cost totaled RMB8.4 trillion, accounting for 17.8% of the GDP. By the structure of logistic cost, the transportation fee, warehousing charges and logistics management fee stands at 55%, 33% and 12%, respectively.

Of China's top 50 logistic enterprises, 22 ones are transportation-oriented, making up 44%; 26 ones are integrated businesses, occupying 52%; and the rest 2 are warehousing logistic firms, sharing 4%. Concerning geographical distribution of the top 50 businesses, 78% are spread in economically developed East China, 12% are located in West China, 8% in Central China, and the rest 2% in Northeast China.

In 2011, shipping companies suffered a hit in performance among transportation-oriented logistic enterprises. The reduction came as the glooming international economic environment, which caused the slash in demand and freight rate. And many shipping companies encountered heavy loss. In particular, the loss of China COSCO Holdings Company Limited reached RMB10.5 billion, followed by China Shipping Container Lines Co., Ltd. and Chang Jiang Shipping Group Phoenix Co., Ltd. with the respective loss of RMB2.7 billion and RMB880 million.

In 2011, the revenue of the top 8 integrated logistic companies was in excess of RMB1.0 billion each, among them Xiamen C&D Inc., Xiamen Xiangyu Group Corporation and Shanghai International Port Group (SIPG) were all with the revenue over RMB10 billion. When it comes to net income, SIPG ranked No.1 (RMB4.724 billion), followed by Tielong Container Logistics (RMB504 million) and Xiamen C&D Inc. (RMB230 million).

In 2011, the warehousing logistic enterprises generate profit mainly from value-added services. The traditional custodian service saw negative profit, while businesses including freight forwarding, spot market and impawning supervision all pay off. In 2011, CMST Development, the warehousing business of which involves in steel, coal and non-ferrous metal, realized the gross margin of 4.5% and the net profit margin of 1.7%; Aucksun, the warehousing business of which mainly engages in IT metal materials, registered the gross margin of 10.1% and the net profit margin of 5.7%, respectively.

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