

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.

Contents

1. OVERVIEW OF LOGISTICS

1.1 Definition and Classification

1.1.1 Definition

1.1.2 Classification of Logistics System

1.2 Report Highlights

2. DEVELOPMENT OF LOGISTICS INDUSTRY IN CHINA

2.1 Status Quo

2.1.1 Characteristics

2.1.2 Operation of Logistics Companies

2.1.3 Top 50 Logistics Companies in China

2.2 Overview of Transport Logistics Market

2.2.1 Competitive Landscape

2.2.2 Three Transportation Groups

2.2.3 Operation of Listed Companies

2.3 Overview of Integrated Logistics Market

2.3.1 Operation of General Cargo Listed Companies

2.4 Overview of Warehouse Logistics Market

2.4.1 Operation of Warehousing Companies in 2011

2.4.2 Operation of Listed Companies

3. TRANSPORT LOGISTICS COMPANIES

3.1 China COSCO Holdings Company Limited

3.1.1 Profile

3.1.2 Freight Volume and Capacity

3.1.3 Revenue Share

3.1.4 Performance Outlook for 2012

3.2 China Shipping Development Company Limited

3.2.1 Profile

3.2.2 Revenue Structure

3.2.3 Strategy

3.3 China Shipping Container Lines Co., Ltd.

3.3.1 Profile

3.3.2 Revenue Structure

- 3.4 China Shipping Haisheng Co., Ltd.
 - 3.4.1 Profile
 - 3.4.2 Revenue Structure
 - 3.4.3 Performance Outlook for 2012
- 3.5 Sinotrans Ltd.
 - 3.5.1 Profile
 - 3.5.2 Revenue Structure
 - 3.5.3 Development Plan
- 3.6 Sinotrans Air Transportation Development Co., Ltd.
 - 3.6.1 Profile
 - 3.6.2 Revenue Structure
 - 3.6.3 Development Plan
- 3.7 China Merchants Steam Navigation Company Limited
 - 3.7.1 Profile
 - 3.7.2 Revenue Structure
 - 3.7.3 Freight Volume and Capacity
 - 3.7.4 Suppliers and Clients
 - 3.7.5 Performance Outlook for 2012
- 3.8 Ningbo Marine Company Limited
 - 3.8.1 Profile
 - 3.8.2 Revenue Structure
 - 3.8.3 Freight Volume
 - 3.8.4 Suppliers and Clients
- 3.9 Chang Jiang Shipping Group Phoenix Co., Ltd.
 - 3.9.1 Profile
 - 3.9.2 Revenue Structure
 - 3.9.3 Suppliers and Clients
 - 3.9.4 Development Strategy
- 3.10 SITC International Holdings
 - 3.10.1 Profile
 - 3.10.2 Revenue Structure
 - 3.10.3 Shipbuilding Plan

4 INTEGRATED LOGISTICS COMPANIES

- 4.1 Xiamen Xiangyu Group Corporation
 - 4.1.1 Profile
 - 4.1.2 Procurement & Supply
 - 4.1.3 Integrated Logistics Service

- 4.1.4 Logistics Network Platform
- 4.1.5 Revenue Structure
- 4.1.6 Business Mode
- 4.2 Shanghai International Port Group (SIPG)
 - 4.2.1 Profile
 - 4.2.2 Revenue Structure
 - 4.2.3 Performance Outlook for 2012
- 4.3 Feima International Supply Chain
 - 4.3.1 Profile
 - 4.3.2 Revenue Structure
 - 4.3.3 Performance Outlook for 2012
- 4.4 Yangtze River Investment
 - 4.4.1 Profile
 - 4.4.2 Revenue Structure
 - 4.4.3 Performance Outlook for 2012
- 4.5 Eternal Asia
 - 4.5.1 Profile
 - 4.5.2 Revenue Structure
- 4.6 Xiamen C&D Inc.
 - 4.6.1 Profile
 - 4.6.2 Revenue Structure
 - 4.6.3 Supply Chain
- 4.7 Tielong Container Logistics
 - 4.7.1 Profile
 - 4.7.2 Revenue Structure
- 4.8 CTS International Logistics
 - 4.8.1 Profile
 - 4.8.2 Revenue Structure
 - 4.8.3 Clients and Suppliers
- 4.9 PG Logistics

5. WAREHOUSE LOGISTICS COMPANIES

- 5.1 CMST Development
 - 5.1.1 Profile
 - 5.1.2 Revenue Structure
 - 5.1.3 Warehouse Logistics
 - 5.1.4 Spot Market
- 5.2 Aucksun

5.2.1 Profile

5.2.2 Revenue Structure

5.2.3 Development Plan

Selected Charts

SELECTED CHARTS

Business Pattern of Modern Logistics

Revenue Growth of Chinese Logistics Enterprises

Revenue Scale of Chinese Logistics Enterprises

Revenue and Profit of Chinese Logistics Enterprises

Four Major Logistics Enterprises in China

Top 50 Logistics Enterprises in China, 2011

Listed Companies Subordinated to COSCO Group and Their Major Businesses

Listed Companies Subordinated to Sinotrans & CSC Group and Their Major Businesses

Major Business, Revenue and Net Income of Listed Transport Logistics Companies in China

Gross Margin of Listed Transport Logistics Companies in China, 2009-2011

Net Profit Margin of Listed Transport Logistics Companies in China, 2009-2011

Major Business, Revenue and Net Income of Listed Integrative Logistics Companies in China

Gross Margin of Listed Integrative Logistics Companies in China, 2009-2011

Net Profit Margin of Listed Integrative Logistics Companies in China, 2009-2011

Proportion of Revenue and Profit of Chinese Storage Industry by Business, 2011

Major Business, Revenue and Net Income of Listed Warehouse Logistics Companies in China

Gross Margin of Listed Warehouse Logistics Companies in China, 2009-2011

Net Profit Margin of Listed Warehouse Logistics Companies in China, 2009-2011

Container Shipping Volume of COSCO by Shipping Lines, 2010-2011

Container Shipping Revenue of COSCO by Shipping Lines, 2010-2011

Dry Bulk Freight Volume of COSCO, 2010-2011

Dry Bulk Shipping Capacity of COSCO

Business Volume of COSCO Logistics, 2010-2011

Revenue and Net Income of COSCO, 2009-2011

Container Shipping Volume of COSCO, 2012Q1

Bulk Freight Volume of COSCO, 2012Q1

Number of Ships and Shipping Capacity of CSDC

Revenue and Net Income of CSDC, 2008-2011

Revenue of CSDC by Freights, 2009-2011

Gross Margin of CSDC by Freights, 2009-2011

Cost Structure of CSDC, 2011

Shipbuilding Plan of CSDC

Freight Volume of CSCL by Shipping Lines, 2011
Freight Volume of CSCL by Shipping Lines, 2011H1
Revenue of CSCL by Shipping Lines, 2011H1
Revenue and Net Income of China Shipping Haisheng Co., Ltd, 2009-2011
Revenue and Gross Margin of China Shipping Haisheng Co., Ltd by Business, 2009-2011
Revenue of China Shipping Haisheng Co., Ltd by Region, 2009-2011
Equity Structure of SINOTRANS
Revenue and Net Income of SINOTRANS, 2006-2011
Business Volume of Freight Forwarding, Shipping Agency and Storage & Dock Service of SINOTRANS, 2006-2011
Revenue of SINOTRANS by Division, 2010
Profit of SINOTRANS by Division, 2010
Revenue and Net Income of SINOTRANS Development, 2009-2011
Revenue of SINOTRANS Development by Business, 2009-2011
Gross Margin of SINOTRANS Development by Business, 2009-2011
Revenue of SINOTRANS Development by Region, 2009-2011
Equity Investment Yield of SINOTRANS Development, 2010-2011
Revenue and Net Income of CMES, 2008-2011
Revenue and Gross Margin of CMES by Business, 2008-2011
Cost of CMES, 2009-2011
Net Income and Net Profit Margin of CMES, 2008-2011
Operation of Newly-Built Ships, 2011
Production Quota of CMES, 2009-2011
Bulk Freight Volume of CMES, 2009-2011
Top 5 Clients of CMES, 2010-2011
Top 5 Suppliers of CMES, 2011
Shipping Capacity of CMES's Tanker Fleet, Late 2003-Late 2012E
Shipping Capacity of CMES's Bulk Carrier Fleet, Late 2003-Late 2012E
Revenue and Gross Margin of Ningbo Marine Group, 2008-2011
Revenue and Gross Margin of Ningbo Marine Group by Business, 2008-2011
Net Income and Net Profit Margin of Ningbo Marine Group, 2008-2011
Ningbo Marine Group's Revenue from Top 5 Clients, 2009-2011
Ningbo Marine Group's Procurement Value from Top 5 Suppliers, 2009-2011
Revenue and Gross Margin of Changjiang Shipping Group Phoenix Co., Ltd, 2008-2011
Revenue of Changjiang Shipping Group Phoenix Co., Ltd by Region, 2008-2011
Net Income and Net Profit Margin of Changjiang Shipping Group Phoenix Co., Ltd by Region, 2008-2011
Revenue of Changjiang Shipping Group Phoenix Co., Ltd from Top 5 Clients,

2009-2011

Name List and Revenue Contribution of Changjiang Shipping Group Phoenix Co., Ltd's Top 5 Clients, 2011

Procurement Value of Changjiang Shipping Group Phoenix Co., Ltd from Top 5 Suppliers, 2009-2011

Shipbuilding Progress of Changjiang Shipping Group Phoenix Co., Ltd

Revenue and Net Income of SITC International, 2009-2011

Revenue and Gross Margin of SITC International by Business, 2009-2011

Carrying Capacity and Freight Forwarding Volume of SITC International, 2009-2011

Operating Cost of Offshore Logistics of SITC International, 2009-2011

Operating Cost of Onshore Logistics of SITC International, 2009-2011

Major Clients of Integrated Logistics Service of Fujian Xiamen Xiangyu Stock Co., Ltd

Major Clients of Logistics Network Platform of Fujian Xiamen Xiangyu Stock Co., Ltd

Revenue and Net Income of Fujian Xiamen Xiangyu Stock Co., Ltd, 2010-2011

Revenue and Gross Margin of Fujian Xiamen Xiangyu Stock Co., Ltd by Businesses, 2011

Top 5 Clients and % of Revenue of Fujian Xiamen Xiangyu Stock Co., Ltd, 2010-2011

Revenue and Net Income of SIPG, 2009-2011

Revenue of SIPG by Business, 2008-2011

Gross Margin of SIPG by Business, 2008-2011

Operating Network of Feima International

Revenue and Net Income of Feima International, 2008-2011

Revenue of Feima International by Sector, 2008-2011

Revenue of Feima International by Business, 2010-2011

Gross Margin of Feima International by Business, 2010-2011

Revenue of Feima International by Region, 2009-2011

Revenue and Net Income of Yangtze River Investment Industry Co., Ltd, 2008-2011

Revenue of Yangtze River Investment Industry Co., Ltd by Sector, 2008-2011

Gross Margin of Yangtze River Investment Industry Co., Ltd by Sector, 2010-2011

Government Subsidies Obtained by Yangtze River Investment Industry Co., Ltd, 2007-2011

Revenue and Net Income of Eternal Asia, 2008-2011

Revenue of Eternal Asia by Sector, 2009-2011

Revenue of Eternal Asia by Business, 2009-2011

Gross Margin of Eternal Asia by Business, 2009-2011

Revenue of Eternal Asia by Region, 2008-2011

Name List and Revenue Contribution of Eternal Asia's Top 5 Clients, 2009-2011

Revenue and Net Income of Xiamen C&D Inc, 2008-2011

Revenue of Xiamen C&D Inc by Sector, 2007-2011

Gross Margin of Xiamen C&D Inc by Business, 2008-2011
Revenue and Growth Rate of Supply Chain of Xiamen C&D Inc, 2007-2011
Revenue and Net Income of Supply Chain of Xiamen C&D Inc by Sector, 2011
Revenue and Net Income of Tielong Container Logistics, 2008-2011
Revenue of Tielong Container Logistics by Business, 2008-2011
Gross Margin of Tielong Container Logistics by Business, 2008-2011
Special Container Businesses of Tielong Container Logistics by Origin of Revenue, 2007-2011
Name List and Revenue Contribution of Tielong Container Logistics' Top 5 Clients, 2011
Revenue and Net Income of CTS International Logistics, 2009-2011
Revenue of CTS International Logistics by Business, 2009-2011
Gross Margin of CTS International Logistics by Business, 2009-2011
Revenue of Cross-border Integrated Logistics of CTS International Logistics by Origin of Revenue, 2009-2011
Gross Margin of Cross-border Integrated Logistics of CTS International Logistics by Origin of Revenue, 2009-2011
Operating Data of Cross-border Integrated Logistics of CTS International Logistics, 2009-2011
Top 5 Clients of Cross-border Integrated Logistics of CTS International Logistics, 2009-2011
Top 5 Clients of Supply Chain Trading Business of CTS International Logistics, 2009-2011
Operating Network of P.G. Logistics
Revenue and Net Income of CMST, 2009-2011
Revenue of CMST by Region, 2011
Revenue and Gross Margin of CMST by Business, 2008-2011
Revenue and Growth Rate of CMST's Logistics Business, 2008-2011
Throughput and Fee Rate of CMST's Storage Logistics, 2005-2010
Storage Area of CMST, 2005-2010
Spot Market and Area of CMST
Revenue and Net Income of Aucksun, 2008-2011
Revenue of Aucksun by Sector, 2010-2011
Gross Margin of Aucksun by Business, 2008-2011
Revenue of Aucksun by Region, 2010-2011

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