

China Logistics Industry Report, 2010-2011

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Abstracts

According to the statistics of China Federation of Logistics & Purchasing (CFLP), in 2010, the total amount of social logistics in China approximated RMB125 trillion, up 1.6 folds over 2005 at an annual average growth rate of 21%; the added value of Chinese logistics industry approached RMB2.7 trillion, up 1.2 folds over 2005 at an annual average growth rate of 16.7%, and accounting for 7% of the GDP and 16% of the added value of the tertiary industry.

In regard to the structure of the total amount of social logistics, industrial product logistics has maintained the lion's share of 90% or so ever since 2010, followed by import cargo logistics with roughly 7.5% share, and other types of logistics with even fewer shares; for instance, agricultural products logistics takes only 2%, while renewable resources logistics accounts for around 0.4%, indicating uneven development of the industry with significant disparities.

As for industry segments, automotive logistics has become one of the relatively booming industries in recent years, which is mainly fueled by the flourishing domestic automotive manufacturing and auto consumption market. It is estimated that the market size of automotive logistics in China has surpassed RMB200 billion in 2006 and exceeded RMB300 billion in 2010, and accordingly, will rest on RMB500 billion in 2020.

The future automotive logistics in China will take on the following four characteristics. First of all, domestic third-party logistics will witness an obvious rise in the market share and blossom into the mainstream of the industry. Secondly, railway and waterway transportations will enjoy climbing market shares. Thirdly, an increasing number of international logistics companies will enter Chinese automotive logistics market. And finally, auto spare parts logistics will become a highlight of the industry development along with the improving logistics system in China.

China's home appliance industry is among the earliest industries involved in the field of modern logistics. Third-party home appliance logistics enterprises have mushroomed in China in recent years, and the market competition has been fierce. It's estimated that the market size of Chinese home appliance logistics has doubled within 3 years from over RMB100 billion in 2007 to RMB200 billion or so in 2010. As waste & old home appliances emerge in progressive numbers nowadays, home appliance recycling logistics will become a hot topic in the industry.

Apart from automotive logistics and home appliance logistics industries, this report casts light on such logistics market segments as petrochemical logistics, steel logistics, coal logistics, and pharmaceutical logistics as well as the key enterprises from different angles like current development, enterprise operation, and development trend. Furthermore, it underlines the current operation of medium and large-sized comprehensive logistics enterprises in China, including Sinotrans, COSCO Logistics, China Shipping Group, CMST Development Stock Co., Ltd. (CMSTDC), Shanghai International Port (Group) Co., Ltd. (SIPG), and China Merchants Energy Shipping Co., Ltd.

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