

China Special Freight Logistics Industry Report, 2011-2012

<https://marketpublishers.com/r/C2EF68C7380EN.html>

Date: May 2012

Pages: 51

Price: US\$ 1,300.00 (Single User License)

ID: C2EF68C7380EN

Abstracts

This report highlights the study of large goods and dangerous cargo logistics, and also analyzes the highly specialized logistics fields, such as IT logistics, pharmaceutical logistics and home appliance logistics.

Automotive logistics providers often depend on large groups. The logistics subsidiaries of large automakers like SAIC and Changan Automobile Group not only engage in their own automotive logistics, but also provide logistics services for other small automotive brands.

Fueled by the downstream demand, China's automotive logistics industry has witnessed robust growth. The net income of Changan Minsheng APLL Logistics Co., Ltd. achieved a CAGR of 35.6% in 2008-2011. The revenue of Anji TNT, 80% of whose businesses are vehicle logistics, grew at CAGR of over 25% in recent three years. Commercial automobile transportation has become the major business of China Railway Special Cargo Services Co., Ltd. which delivered 320,000 commercial automobiles in the first four months of 2012, equivalent to six times as its annual transportation volume in 2006.

The petrochemical logistics grows quickly in China and the top three providers are FreeTrade Science and Technology, Winbase and Oriental Energy. In 2008-2011, the revenue and net income of FreeTrade Science and Technology increased at a CAGR of 50.3% and 60% separately, and those of Winbase rose at a CAGR of 9.1% and 6.8% respectively.

China's pharmaceutical logistics is still in the stage of optimization of single link in the supply chain which hardly involves the integration of upstream pharmaceutical plants

and providers and downstream wholesale & retail pharmaceutical enterprises and hospitals. There are a large number of small pharmaceutical logistics businesses, featuring low degree of industry concentration. The top 3 pharmaceutical logistics providers, namely, Sinopharm Logistics, Shanghai Pharmaceutical Logistics Center and Jointown Pharmaceutical Logistic Center, together make up less than 20% market share.

IT logistics providers are mainly located in the Yangtze River Delta and the Pearl River Delta. Affected by the industry climate, IT logistics industry is wholly on the decline in recent years. In 2008-2011, the revenue of Jiangsu Feiliks International Logistics Inc. grew at a CAGR of negatively 16.8%, and the net income presented a CAGR of negatively 5.8%. And the revenue and net income of Xinning Logistics presented a CAGR of -26.8% and -9.8% separately.

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