

# Investigation Report on China's Express Delivery Industry 2021-2025

<https://marketpublishers.com/r/l8BE6BB89316EN.html>

Date: June 2021

Pages: 50

Price: US\$ 2,600.00 (Single User License)

ID: l8BE6BB89316EN

## Abstracts

Express delivery is a door-to-door logistics activity with postal functions, which means express companies use rail, road, and air transportation to quickly deliver customers' goods.

According to CRI's analysis, the efficiency and functions of express delivery services are better than ordinary postal services in China, but the charges are also significantly higher than ordinary postal services. There are three types of courier services: intra-city courier, domestic inter-city courier, and international courier.

In 2020, China's online retail sales value reached CNY11,760.1 billion, with a year-on-year increase of 10.9%. Among them, the online retail sales value of physical goods was CNY975.9 billion, with an increase of 14.8%, accounting for 24.9% of the total retail sales of consumer goods; among the online retail sales of physical goods, food, clothing, and consumer goods increased by 30.6% and 5.8% and 16.2% respectively.

According to CRI's analysis, the rapid rise of e-commerce in China in recent years and the surge in market demand have led to rapid growth in the express delivery industry. The volume of China's express delivery business has increased from 31.3 billion in 2016 to 83.4 billion in 2020. In 2020, the revenue of China's express delivery industry has reached CNY879.5 billion. The Chinese government has issued a series of policies to support the development of the express delivery industry, and some local governments have also issued policies to support the development of the express delivery industry in the region. However, the development of China's express delivery industry also has some risks and challenges, such as rising rents and labor costs leading to an increase in overall costs. And some government policies may also have an adverse effect on China's express delivery industry.

Due to the extensive development of China's express delivery industry, severe homogeneity competition, the continued decline in profit margins, and capital needs of large infrastructure, many private express companies that have difficulty in obtaining bank loans have chosen to be listed to raise funds to increase their competitive advantage in the market. By 2020, the market structure of China's express delivery industry has not undergone major changes. Major companies in the express industry have been listed. For example, Zhongtong Express and Best Express are listed on the New York Stock Exchange. S.F. Holding Co., Ltd., YTO Express, STO Express, and Yunda Express with their backdoor listing plan are listed on the A-share market. Debon, as the first express company to be listed on the domestic main board through an IPO, is listed on the A-share market.

According to CRI's analysis, due to rising labor costs and store rents in China, the cost of physical stores has continued to rise, enhancing the advantages of the online retail industry. It is expected that China's e-commerce industry will develop rapidly from 2021 to 2025. In addition, due to the severe impact of the COVID-19 epidemic on the real economy in 2020, the advantages of e-commerce have become prominent, driving the rapid development of the express delivery industry. At the same time, new e-commerce models such as cross-border shopping will also promote the development of China's express delivery industry and bring new development directions to the express delivery industry. The policies of the Chinese government in the next few years will also be beneficial to the development of the express delivery industry. For example, the State Council executive meeting held in 2021 has determined a series of measures to support transportation, express delivery, and other logistics industries to alleviate difficulties and speed up the recovery and development. These include that all localities should provide equal access to postal and express delivery companies of various ownerships, break the "last mile" delivery barriers in villages and communities and increase reductions of the tax fee.

#### Topics Covered:

Economic Environment of Express Delivery Industry in China

Policies in Express Delivery Industry in China

Analysis of Supply and Demand in Express Delivery Industry in China,  
2016-2020

Analysis of Market Competition in Express Delivery Industry in China

Analysis of Major Companies in Express Delivery Industry in China

Analysis of Costs in Express Delivery Industry in China

Price Trend of Express Delivery Services in China

Driving Forces and Opportunities in Express Delivery Industry in China

Unfavorable Factors in Express Delivery Industry in China

Forecast on Supply and Demand in Express Delivery Industry in China  
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The impact of COVID-19 on the Express Delivery Industry in China

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