

Research Report on China Express Delivery Industry, 2017-2021

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Abstracts

DESCRIPTION

Express delivery is the door-to-door logistics with additional post functions. It refers to the fast delivery of goods to customers through railway, road or air transport.

According to CRI, in China, both the efficiency and function of express delivery are better than that of postal services, but correspondingly, the charge is higher, too. There are three types of geographical scope of express delivery: intra-city delivery, nation-wide inter-city delivery and international delivery.

In 2016, online retail sales in China was CNY 5,155.6 billion, increasing by 26.2% YOY. Retail sales of physical goods was CNY 4,194.4 billion, increasing by 25.6% YOY and accounting for 12.6% of total retail sales of consumer goods. Among these goods, food, clothing and daily goods increased by 28.5%, 18.1% and 28.8%, respectively.

According to CRI, surging market demand brought about by the booming e-commerce in China stimulated the fast growth of express delivery. The volume of business of express delivery in China increased from 1.2 billion parcels in 2007 to 31.3 billion in 2016. In 2016, the revenue of China's express delivery industry exceeded CNY 400 billion. Both the Chinese government and some local governments have issued policies to support the development of the express delivery industry.

However, the development of the industry is also faced with risks and challenges. For example, the overall cost has been pushed up by increasing property rental and human capital costs. Some policies are also unfavorable to the express delivery industry. For example, Provisions on the Administration of the Running of Transport Vehicles with

Out-of-gauge Goods on the Road, which is known for its historical strictness, was implemented on September 21, 2016. It stipulated that the maximum of combined weight of the vehicle and goods shall be reduced from 55 tons to 49 tons. Total height of vehicle and goods combined must not exceed 4m from ground; total width of vehicle and goods combined must not exceed 2.55m; total length of vehicle and goods must not exceed 18.1m. A fine of CNY 500 would be imposed on every 1 ton in excess and the upper limit of fines is CNY 30,000. It is believed that these provisions would increase long-distance road transport costs by 20% to 30%.

As a result, part of road transport, especially commodities transport, would be transferred to railway transport, increasing the cost of express delivery.

China's express delivery industry is characterized by extensive development mode, severe homogeneous competition, declining profitability and huge infrastructure investment. As a result, many private express delivery companies which find it hard to borrow money from banks turned to going public to raise funds so as to improve their competitive advantages. The year 2016 saw the most dynamic capital activities in China's express delivery industry. A number of express delivery leaders were listed. For example, ZTO was listed on NYSE; YTO, S.F. Express, STO and Yunda Express were listed on A-share market through back-door listings utilizing Dalian Dayang Trands, Dingtai Rare Earth & New Materials, IDC Fluid Control and Xinhai Electric, respectively; Best Express and Deppon are also planning to go public.

According to CRI, the cost to run physical stores has been increasing with surging labor costs and rentals. As a result, the strength of online retailing has been enhanced. It is expected that China's e-commerce industry will keep growing fast from 2017 to 2021. In addition, new e-commerce modes, such as cross-border shopping, will also promote the development of China's express delivery industry. Government policies in the coming years will also support the development of the express delivery industry. For example, in early 2017, Premier Li Keqiang reiterated that online shopping is the 'new economy' which directly drives sales of physical factories.

As a representation of the 'new economy', express delivery is driving both consumption and production. State Post Bureau issued Thirteenth Five-Year Plan for Express Delivery Industry (2016-2020) in which six development targets were raised for China's express delivery industry from 2016 to 2020, one of which is to build flagship express delivery enterprises and to form three to four leaders by 2020. It is estimated that China's express delivery industry will keep growing at over 20% per year. With more mergers and restructuring going on, companies with ill management will be forced to

close down.

Readers can obtain the following information or more through this report:

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,
2012-2016

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,
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