

Research Report on China Express Delivery Industry, 2020-2024

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Abstracts

From 2015 to 2020, the frequency of online shopping applications of Chinese Internet users increased from 56.00% to 79.7%. Online shopping has become one of the important daily activities of Chinese residents. With the development of China's economy, especially e-commerce industry, the volume of express delivery kept increasing from 20.67 billion in 2015 to 63.52 billion in 2019, indicating that China's express delivery industry is booming.

With the outbreak of COVID-19 in China in early 2020, due to the launch of lockdown by multiple local governments in China, China's express delivery industry has been greatly affected from January to February 2020. According to CRI's market research, the total volume of China's express delivery from January to February 2020 is about 6.54 billion, a year-on-year decrease of about 10%. From January to February 2020, the number of express delivery from China to foreign countries reached 188.8 million, a year-on-year increase of 5.3%. After March 2020, the epidemic in China has gradually been brought under control, and more and more Chinese residents have chosen to shop online, which has gradually increased the volume of express delivery in China. From January to August 2020, China's express delivery volume totaled 48.05 billion, a year-on-year increase of 25.4%. The outbreak of COVID-19 has promoted the growth of China's express delivery industry to a certain extent.

According to CRI's market research, Chinese express delivery companies can be classified into four types: 1) Foreign-funded express delivery companies, such as DHL; 2) State-owned express delivery companies, such as EMS; 3) Large private express delivery companies, such as S.F. Express, STO Express; and 4) other small private express delivery companies.

Top 5 express delivery players in China usually refer to S.F. Express, YTO Express, ZTO Express, Yunda Express and STO Express.

According to CRI's market research, two of the most important costs in express delivery industry is transportation and labor cost. On the one hand, the price of gasoline and diesel oil is in a downward trend soon, so the cost of express industry is facing a downward trend. In addition, due to the large fluctuation of oil price, the cost of express industry will be affected to some extent; on the other hand, labor costs are measured by wages, showing a slow upward trend. It means that the express industry is facing high labor costs. In recent years, the price of each express company has been equal. From the time dimension, the price level is decreasing year by year.

The reasons for the price changes of express delivery in China in 2015-2019 can be explained from two perspectives: the booming online shopping and mobile business in China; gradually formed scale effect, which saves part of the cost and is able to maintain the price stability.

With the maturity of the express industry, various express companies are competing in different ways, and the price gap is expected to be widened. In addition, due to the rising trend of labor and other costs, the overall average price of express delivery will slightly rise.

According to CRI's market research, although the COVID -19 epidemic will not be completely over in the short term, the epidemic has not caused a significant adverse impact on the express delivery industry. To a certain extent, the existence of the epidemic has promoted the demand for the express delivery industry in the Chinese market.

Topics Covered:

Economic Environment of Express Delivery Industry in China 2015-2020

Policies in Express Delivery Industry in China

Analysis of Supply and Demand in Express Delivery Industry in China

International and domestic express delivery in China

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 international express delivery and China's domestic
express delivery industry

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