

Research Report on China's Top 50 Logistics Enterprises, 2010-2011

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Abstracts

The logistics industry involves manufacturers and logistics enterprises, including a series of links such as storage, transportation, package, distribution and information processing. By the end of 2010, there have been about 100,000 related enterprises of the logistics industry with low industrial concentration.

After the entry into WTO, China comprehensively carried out the policy of opening-up. In 2008, the Ministry of Commerce listed modern logistics in industries encouraged for foreign investment. And China was listed as one of the most important logistics markets in the world by a number of foreign logistics enterprises.

In recent years, international logistics enterprises constantly increase the investment in China and speed up logistics network expansion. Currently, China has become an important overseas market for various international logistics enterprises, and the number of international logistics enterprises in China increases. International logistics enterprises speed up mergers of large-scale logistics enterprises and provide increasingly abundant services in various forms (joint ventures/mergers, especially with large private logistics enterprises). At present, multinational logistics enterprises have formed strategic superiority in air freight field, while that in express delivery has been initially formed. Following port, parks and transit center, domestic airports become new investment spots for foreign investors, who are optimistic about investment in China's domestic airports in the long term. In recent years, foreign industrial estate developers bring in new development mode of logistics estate, break original market pattern, accelerate transformation, reorganization and upgrade of China's logistics industry, and also bring competition to China's local logistics enterprises.

International operation is an important way for local logistics enterprises to tackle the

international competition. It will be the development direction for China's local logistics giants to explore multinational service demand of domestic and overseas clients with local advantages, provide powerful support of logistics and supply chain management for domestic clients to expand business overseas, and offer complete localized logistics and supply chain solutions. In fact, local logistics enterprises represented by COSCO Logistics and Sinotrans Logistics are improving their services to enhance their competitiveness. For instance, COSCO Logistics emphasizes on high value-added supply chain and logistics service related to the shipping industry and transnational transportation. On the basis of storage resources, China National Materials Storage and Transportation Logistics Co., Ltd. form comprehensive logistics business mode efficiently combining spot market, movable property supervision, bulk trade, processing and distribution with freight agency.

In China, foreign logistics giants like Maersk, ProLogis and four international express giants successively adopt more sound and pragmatic business strategies. The innovative and value-added services of many foreign logistics enterprises such as vendor managed inventory, supply chain finance and logistics in duty-free zones show powerful risk resistance capacity.

The main business revenue of China's top 50 logistics enterprises totaled CNY 450.60 billion in 2009 with a slight decrease over 2008. Among China's top 50 logistics enterprises, the main business revenue of COSCO Group exceeded CNY 100 billion, and that of 9 enterprises represented by Sinotrans Shipping Limited exceeded CNY 10 billion. The average main business revenue of China's top 50 logistics enterprises in 2009 exceeded CNY 1 billion, among which the 50th logistics enterprise's main business revenue reached CNY 1,219.70 million.

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Prediction on development trend of China's logistics industry

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Selected Charts

SELECTED CHARTS

Chart Operations of COSCO Group, 2006-2010

Chart Operations of Sinotrans Shipping Limited, 2006-2010

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