

# Research Report on China's Logistics Industry, 2012

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## Abstracts

China's logistics industry starts relatively late. Since the reform and opening up, with the rapid development of Chinese economy, the market demand for logistics industry is also constantly enlarged.

In 2011, Chinese logistics industry sharply developed. In 2011, the total amount of Chinese social logistics was CNY 158.4 trillion, with an increase of 12.3% YOY, but the increase rate was with a decrease of 2.7% YOY. The total expense of social logistics was as high as CNY 8.4 trillion, accounting for 17.8% of GDP, nearly equal to that of 2010. Compared with the 9% of developed countries in the same index, there is still a big gap. The high costs of Chinese logistics are not only related to the backward operation concepts of Chinese logistics industry and low operation efficiency due to the lack of talents, but also the high extra costs faced, excessive toll roads, various kinds of fines, etc.

In terms of the classification of the total amount of logistics, in the whole year of 2011, the total amount of Chinese industrial product logistics reached CNY 143.6 trillion, with an increase of 13.1% YOY calculated according to the comparable prices, accounting for 90.2% of the total social logistics amount; the total logistics amount of renewable resources, units and resident items maintained the high-speed increase, with an increase of 20.4% YOY and 18.3% YOY separately; the growth speeds of the total amount of imported goods and agricultural product logistics were lower than the general level, which were 4.3% and 4.5% separately.

In 2011, the total logistics expense of China was CNY 8.4 trillion, with an increase of 18.5% YOY, and the increase rate was 1.8% higher than that of 2010. Among it, the transportation expense was CNY 4.4 trillion, with an increase of 15.9% YOY, which was 1.9% higher than that of 2010, accounted for 52.8% of the total logistics expenses of China; the management expense was CNY 1 trillion, with an increase of 18.7% YOY,

accounting for 12.2% of the total logistics expenses of China; the storage expense was CNY 2.9 trillion, with an increase of 22.6% YOY, whose increase rate was 2.1% higher than that in 2010, accounting for 35% of the total logistics expenses of China. On the whole, the logistics cost of China's economic operation was still relatively high in 2011.

Since the international financial crisis, the integration of Chinese logistics market has speeded up, which presents the obvious seasonal and structural changes. With the change of Chinese economic structure, the logistics of automobiles, household appliances and electronic products increases with a high speed; the logistics demand for infrastructure construction dramatically increases; the logistics demands for agricultural products, food and consumer goods steadily increase; the related city distribution, warehousing transit, freight and express delivery, and so on all maintain a high development momentum. In terms of regions, because of the entry into mature period of the logistics industry in the coastal developed regions in east China and the shrinking of foreign trade demands, so the increase speed there slows down; while because of the industrial transferring in the middle and west regions and the growing period of logistics industry in these regions, so the increase speed there is relatively fast. On the whole, the demand of Chinese logistics market continually increases with a bright prospect.

More following information can be acquired through this report:

Status Quo of China's Logistics Industry

Problems Faced by Chinese Logistics Industry

Government Policies for China's Logistics Industry

Chinese Major Logistics Enterprises

Sub-industries of Chinese Logistics Industry

Development Trend and Investment Suggestions of China's Logistics Industry

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