Research and Forecast of China Express Delivery Industry, 2013-2017

(Sample)

Huidian Research

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4. Status Quo of China’s Express Delivery Industry

4.2 Express Delivery Business Situation

4.2.1 Business Status Quo

In 2012, express delivery business enjoyed rapid growth. Nationwide express delivery enterprises with above designated sizes had made 5.69 billion deliveries for the whole year, a 54.8% year-on-year rise; business revenue harvested CNY 105.53 billion, a 39.2% year-on-year increase. Express delivery business witnessed an increased proportion. Business revenue accounted for 53.3% of total revenue, registering the growth of 4.8 percentage points over last year.

At the first half of 2013, China's economic operation was steady, structural adjustment was stable with progress, and transformation and upgrading were steadily improved, in such macro background, the whole industry insisted to development serving as the first priority, accurately grasped the trend of industrial development so as to improve ability, expand demand, optimize environment, promote development and carry on various works with steady steps, thus the overall business kept a relatively fast development, universal service business operated firmly and express delivery business enjoyed vigorous growth.

At the first half of 2013, nationwide express service enterprises with above designated sizes made 3.84 billion deliveries, a 60.6% year-on-year growth; business revenue generated CNY 62.98 billion, a 34.5% year-on-year rise.

Fig. 7 China’s Express Delivery Business Situation, 2009-2013

Source: State Post Bureau of The People’s Republic of China; Huidian Research
5. Express Delivery Market Pattern

5.3 Urban Concentration Ratio

Express delivery business has a close relation with local economic development. Normally, the more developed cities, the better express delivery business. In China, business volume and revenue of express delivery enjoy a higher proportion in the first-tier and second-tier cities, while business is relatively less in third-tier and fourth-tier cities or remote areas.

As for business volume, the top 15 cities' business volume accounted for 61.1% of total business volume at the first half of 2013. Of which Shanghai ranked at the first place with 0.4 billion deliveries, Beijing and Guangzhou made over 0.3 billion deliveries, placing on the second and the third respectively. Among these top 15 cities, there were 2 municipalities and 6 provincial cities. In different provinces, Zhejiang province had 4 cities, Guangdong had 3 cities, Jiangsu and Fujian had 2 cities for each.

As for the top 15 cities, their business revenue accounted for 62.6% of total revenue at the first half of 2013. Of which Shanghai harvested more than CNY 10 billion ranking at the first place. Among these 15 cities, there were 3 municipalities and 6 provincial cities. In different provinces, Zhejiang province had 4 cities, Guangdong 3 cities, and Jiangsu had 2 cities.

Fig. 14 Top 15 Cities' Business Volume of Express Delivery at the First Half of 2013 (100 Million Pieces)

Source: State Post Bureau of The People’s Republic of China; Huidian Research
Fig. 15 Top 15 Cities’ Business Revenue of Express Delivery at the First Half of 2013 (CNY100 Million)

Source: State Post Bureau of The People’s Republic of China; Huidian Research

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