

China Domestic Courier, Express and Parcel (Cep) Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 150 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

The Chinese courier, express, and parcel (CEP) market is expected to record a CAGR of over 8% during the forecast period 2022-2027.

Due to the COVID-19 pandemic, several express firms in China were unable to operate regularly from January to February 2020. The transportation restriction of express companies reverted to normal at the beginning of March 2020. Significant corporate organizations have become prepared to fight the COVID-19 pandemic's detrimental impact. For example, in the first quarter of 2020, SF Express sold 1.7 billion express tickets. The organization's sales revenue increased to USD 4.8 billion.

China remains the Parcel Shipping Index's powerhouse. In 2020, China shipped more than 83 billion parcels, increasing 31% from 64 billion in 2019. This equated to 2643 parcels each second or approximately 228 million per day.

The rise of e-commerce platforms like Alibaba has been one of the key factors in the development of the courier, express, and parcel (CEP) sector in China even before the boost provided by the COVID-19 pandemic.

China Domestic Courier Express & Parcel Market Trends

Growth of E-Commerce in China Driving the CEP Market

China's e-commerce market is not only large but diverse, providing rich pickings from a variety of brands. Although richer cities like Beijing, Shanghai, Guangzhou, and Shenzhen remain important, the main growth drivers are smaller and less wealthy cities. These cities are home to emerging middle-income buyers who have turned to online stores in droves due to limited access to

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scott-international.com

www.scott-international.com

physical retail stores in their cities. They mainly purchase value-for-money consumer and household necessities rather than high-end goods.

In 2021, China contributed more than half of the world's e-commerce retail sales, with its sales value exceeding that of Europe and the United States combined. In 2021, China had the world's largest digital buyer population, with over 840 million people.

In 2021, over 90% of e-commerce sales in China were through mobile devices versus 43% in the United States. More broadly, in 2021, China had 932 million mobile internet users representing 99.2% mobile internet penetration.

The government announced plans to build 5G networks in Beijing, Shanghai, Shenzhen, and other key cities in 2019. In 2021, operators had 450 million customers, or 27% of all subscribers, and 1.15 million 5G base stations. In 2021, the handset sector shipped 210 million 5G phones, up 69% from 2020.

The improvements in technology are projected to improve internet connectivity in rural regions, hence boosting the country's internet user base. With increased internet usage among residents, the e-commerce industry is expected to develop rapidly, thus, propelling the expansion of China's CEP market.

Growth of Courier and Parcel Market Fueling CEP Growth in China

According to the country's postal service regulator, China's courier industry handled more than 74 billion packages in 2021, an average of 52 deliveries for each individual. According to the bureau, over 63 billion packages were delivered via express service in 2020, recording a 24% increase year-on-year.

According to the State Post Bureau, the Chinese express delivery development index stood at 316.2 in 2021, up 11.1% year-on-year. The development scale sub-index was 343.8, up 26.2% year-on-year, while the service quality sub-index was 483.3, up 5.6% year-on-year.

New delivery service models have been emerging, bringing courier services to more villages. In 2021, a courier-postal service combination was introduced to 155,000 administrative villages.

In 2021, the State Post Bureau (SPB) continued to tap into the rural market's potential, constructing 40 new high-quality programs demonstrating courier services' facilitation of modern agriculture, bringing the total to 100. In 2021, 37 billion express parcels were collected and shipped to rural areas across China, facilitating USD 290.26 billion in rural-urban commodity exchanges.

China Domestic Courier Express & Parcel Market Competitor Analysis

The Chinese domestic CEP market is fragmented, with a mix of global and local players, which makes the sector highly competitive. Some of the key players in the market include China Post, SF Express, YTO Express, etc. The market has also seen the entrance of new players, with logistics startups like J&T Express, Hivebox, and Lalamove. The local companies are facing high competition from multinational companies that have a comparatively well-developed infrastructure. China's CEP market witnessed some acquisitions and disinvestments in 2021. Delivery and parcel companies are investing in technologies like parcel tracking and click-and-collect systems to gain an edge and scale their services in the country.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table of Contents:

1 INTRODUCTION

- 1.1 Study Deliverables
- 1.2 Study Assumptions
- 1.3 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET INSIGHTS

- 4.1 Current Market Scenario
- 4.2 Value Chain/Supply Chain Analysis
- 4.3 Government Regulations and Initiatives
- 4.4 Technological Trends and Automation
- 4.5 Insights into China Postal and Mail Services
- 4.6 Insights into the E-commerce Market
- 4.7 Insights into Startups and Venture Capital Funding in the CEP Industry
- 4.8 Elaboration on Storage Functions and Value-added Services in CEP Business
- 4.9 Brief on Courier Rates
- 4.10 Insights into Reverse Logistics and Same-day Delivery Market
- 4.11 Impact of COVID-19 on the Market

5 MARKET DYNAMICS

- 5.1 Market Drivers
- 5.2 Market Restraints/Challenges
- 5.3 Market Opportunities
- 5.4 Industry Attractiveness - Porter's Five Forces Analysis
 - 5.4.1 Bargaining Power of Buyers/Consumers
 - 5.4.2 Bargaining Power of Suppliers
 - 5.4.3 Threat of New Entrants
 - 5.4.4 Threat of Substitute Products
 - 5.4.5 Intensity of Competitive Rivalry

6 MARKET SEGMENTATION

- 6.1 By Business Model
 - 6.1.1 Business-to-Business (B2B)
 - 6.1.2 Business-to-Customer (B2C)
 - 6.1.3 Customer-to-Customer (C2C)
- 6.2 By Type
 - 6.2.1 E-commerce
 - 6.2.2 Non E-commerce
- 6.3 By End User
 - 6.3.1 Services
 - 6.3.2 Wholesale and Retail Trade
 - 6.3.3 Healthcare
 - 6.3.4 Industrial Manufacturing

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

6.3.5 Other End Users

7 COMPETITIVE LANDSCAPE

7.1 Overview (Market Concentration and Major Players)

7.2 Company Profiles

7.2.1 China Post

7.2.2 SF Express

7.2.3 YTO Express Group Co. Ltd

7.2.4 ZTO Express

7.2.5 STO Express Co. Ltd

7.2.6 Best Inc.

7.2.7 Deppon Logistics Co. Ltd

7.2.8 Yunda Express

7.2.9 China Postal Tracking

7.2.10 Haihang Tiantian Express

7.2.11 FedEx

7.2.12 Kerry Logistics

7.2.13 ZJS Express*

8 FUTURE OF THE MARKET

9 APPENDIX

9.1 Macroeconomic Indicators (GDP Distribution by Activity, Contribution of Transport/Courier Industry to Economy)

9.2 Key Statistics Related to CEP Sector (such as Sales/Revenue, Consumer Preferences, etc.)

China Domestic Courier, Express and Parcel (Cep) Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 150 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-03"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

