

China Same Day Delivery - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 246 pages | Mordor Intelligence

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Report description:

The China Same Day Delivery Market size is estimated at 32.99 billion USD in 2025, and is expected to reach 49.08 billion USD by 2030, growing at a CAGR of 8.27% during the forecast period (2025-2030).

Established networks to meet the increasing demand for same day deliveries are driving the growth of the segment

- In 2022, the total volume of express deliveries, which also majorly include same day deliveries, accounted for about 80% of the total volume of the postal industry's delivery business, with the majority being same day deliveries. The cumulative revenue from express deliveries also increased by 2.3% YoY in 2022 due to recurring lockdowns, which increased demand for quick and same day deliveries, specifically for essential goods. Also, in 2022, the eastern, central, and western areas accounted for 76.8%, 15.7%, and 7.5% of the total volume of express delivery business, respectively. In alignment with this increasing demand, Cainiao Network, the logistics network of China's Alibaba Group Holding Ltd launched half-day express delivery service in Beijing in 2023.
- The government aims to establish a more pragmatic logistics network by 2035, specifically for domestic and international same day and express deliveries. Deliveries of packages via this network aim to take one day in China, two days to customers in adjacent nations, and three days to major cities worldwide. For this, 80 logistical hubs are expected to be operational to manage local and international express mail deliveries by 2035.

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China Same Day Delivery Market Trends

Rising focus on developing clean energy infrastructure and transport sector investment under 14th Five-Year Plan driving growth

- In 2023, China's clean energy sector significantly contributed to the country's economic expansion. According to Energy and Clean Air (CREA), China's investment in renewable energy infrastructure amounted to USD 890 billion, almost matching global investments in fossil fuel supply for the same year. Clean energy, including renewable energy sources, nuclear power, electricity grids, energy storage, electric vehicles (EVs), and railways, constituted 9.0% of China's GDP in 2023, up from 7.2% YoY. EV production grew by 36% YoY in 2023.
- In the 14th Five-Year Plan (2021-2025), China revealed goals for expanding its transportation network. By 2025, high-speed railways will extend to 50,000 kms, up from 38,000 kms in 2020, with 95% of cities with populations above 500,000 covered by 250-km lines. The country aims to increase its railway length to 165,000 kms, civil airports to over 270, subway lines in cities to 10,000 kms, expressways to 190,000 kms, and high-level inland waterways to 18,500 kms by 2025. The primary objective is to achieve integrated development by 2025, emphasizing advancements in the transformation of the transportation system and its contribution to GDP.

China's retail diesel and gasoline prices were soared to historically high levels amid the Russia-Ukraine War

- In 2023, China imported 11% more crude oil than in 2022, totaling 563.99 mn metric tons (MMT), or 11.28 mn barrels per day. This surge was due to increased global crude oil prices amid the Russia-Ukraine War, causing fuel prices in China to reach historic highs. In Jan-Feb 2024, crude oil imports rose by 5.1% YoY, reaching 88.31 MMT. This increase was driven by purchasing crude oil at lower prices earlier. Brent futures peaked at USD 97.69 in September 2023, fell to USD 72.29 in December, and rose to USD 84.05 by March 2024. The decision made by the OPEC+ group in March 2024 to extend output cuts until the end of June has further boosted crude prices. This move has raised concerns about global oil demand, as the group is reducing production by nearly 6% of world demand. The recent increase in crude prices may also dampen China's imports starting from H2 2024.
- China plans to adjust retail prices for gasoline and diesel to align with recent shifts in global crude oil prices. The price hike reflects a tightening of global supply and a positive forecast for demand. According to NDRC, gasoline and diesel prices in China will increase by USD 28 per ton in 2024. Although there's expectation of declining demand for fuels, oil-based fuels will remain the primary choice until 2035.

China Same Day Delivery Industry Overview

The China Same Day Delivery Market is fragmented, with the major five players in this market being China Post, SF Express (KEX-SF), Shanghai YTO Express (Logistics) Co., Ltd., STO Express Co., Ltd. (Shentong Express) and ZTO Express (sorted alphabetically).

Additional Benefits:

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

Table of Contents:

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1 EXECUTIVE SUMMARY & KEY FINDINGS

2 REPORT OFFERS

3 INTRODUCTION

3.1 Study Assumptions & Market Definition

3.2 Scope of the Study?

3.3 Research Methodology

4 KEY INDUSTRY TRENDS

4.1 Demographics

4.2 GDP Distribution By Economic Activity

4.3 GDP Growth By Economic Activity

4.4 Inflation

4.5 Economic Performance And Profile

4.5.1 Trends in E-Commerce Industry

4.5.2 Trends in Manufacturing Industry

4.6 Transport And Storage Sector GDP

4.7 Export Trends

4.8 Import Trends

4.9 Fuel Price

4.10 Logistics Performance

4.11 Infrastructure

4.12 Regulatory Framework

4.12.1 China

4.13 Value Chain & Distribution Channel Analysis

5 MARKET SEGMENTATION (includes Market Value in USD, Forecasts up to 2030 and analysis of growth prospects)

5.1 Mode Of Transport

5.1.1 Air

5.1.2 Road

5.1.3 Others

5.2 Shipment Weight

5.2.1 Heavy Weight Shipments

5.2.2 Light Weight Shipments

5.2.3 Medium Weight Shipments

5.3 Destination

5.3.1 Domestic

5.3.2 International

5.4 End User Industry

5.4.1 E-Commerce

5.4.2 Financial Services (BFSI)

5.4.3 Healthcare

5.4.4 Manufacturing

5.4.5 Primary Industry

5.4.6 Wholesale and Retail Trade (Offline)

5.4.7 Others

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6 COMPETITIVE LANDSCAPE

6.1 Key Strategic Moves

6.2 Market Share Analysis

6.3 Company Landscape

6.4 Company Profiles

6.4.1 BEST Inc.

6.4.2 China Post

6.4.3 DHL Group

6.4.4 FedEx

6.4.5 SF Express (KEX-SF)

6.4.6 Shanghai YTO Express (Logistics) Co., Ltd.

6.4.7 STO Express Co., Ltd. (Shentong Express)

6.4.8 United Parcel Service of America, Inc. (UPS)

6.4.9 Yunda Holding Co. Ltd.

6.4.10 ZTO Express

7 KEY STRATEGIC QUESTIONS FOR CEP CEOS

8 APPENDIX

8.1 Global Overview

8.1.1 Overview

8.1.2 Porter's Five Forces Framework

8.1.3 Global Value Chain Analysis

8.1.4 Market Dynamics (DROs)

8.1.5 Technological Advancements

8.2 Sources & References

8.3 List of Tables & Figures

8.4 Primary Insights

8.5 Data Pack

8.6 Glossary of Terms

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