

# Transport Intelligence

Market Intelligence for the Transport and Logistics Industry



## Global Express Report 2010

A comprehensive overview of the global express parcels industry with special reference to emerging markets

November 2009

TIGE0911

Price: £995

Pages: 240

## Express industry prospects good despite downturn

The Global Express Parcels sector has been amongst the most dynamic of all transport and logistics markets over the past decade. The industry has been able to provide shippers with global reach, supply chain visibility and, of course, speed, in line with evolving supply chain requirements.

However the industry has not been immune from the global economic downturn. International air express operators have been especially impacted by falling volumes and the trend of clients to 'trade down' to lower cost ground or sea products. This has affected yields and profits.

Away from the more mature markets in Europe and North America, where the downturn has been most keenly felt, there are still areas of significant opportunity. Markets such as Turkey, Russia, Brazil and of course China, will provide companies with long term, sustained growth potential.

Global Express 2010 traces the origins of the industry, looks at the main trends and developments, the key players and forecasts growth up to 2012. In particular it details the emerging markets where growth is likely to be highest.

### ***What will you learn from Global Express Report 2010?***

**Global Express 2010** contains comprehensive market data, commentary and company profiles of the market leaders. It provides answers to a wide range of commonly asked questions:

- How big are the largest Express & Parcels markets?
- How fast are they forecast to grow in 2009 and up to 2012?
- Which countries have the most potential for future growth?
- What are the key trends affecting the industry?
- How is the market structured and what are the market dynamics?
- Which are the largest express operators in each sector?
- What is their market share?
- How are the biggest players performing?
- What business models do the leading operators employ?
- Where have the main investments been made and why?

The report will help you make decisions on investment, resource allocation and business planning.

### ***Who will benefit from the report?***

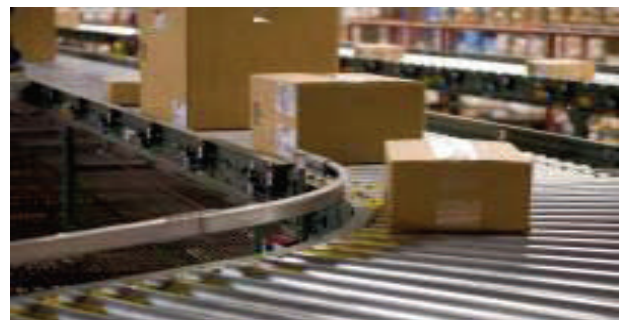
**Global Express 2010** is specifically written to provide easily accessible and understandable information to:

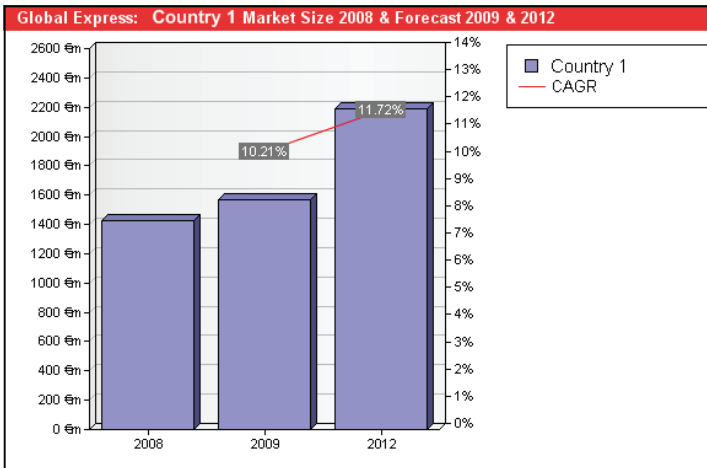
- Consultants and Financial Analysts
- Logistics Directors and Managers
- Marketing Directors and Managers
- Knowledge and Research Managers

As well as all **C-level executives**.

It is especially appropriate to:

- Express and Logistics companies
- Post Offices
- Airlines
- Transport equipment manufacturers
- Consultancies & Banks
- Industrial property developers
- Governmental organisations
- Manufacturers & Retailers





Country Market Size and Forecast

## Market sizing & forecasts

Transport Intelligence's market sizing and forecasts for the global express parcels industry will help companies build business plans, justify investment programmes (including acquisitions) and track the industry's development.

Global Express Report 2010 provides an insight into the size and growth of the market in 2008, 2009 and forecasts through to 2012.

The report includes market shares and top company listings for a range of countries and segments.

## Market and company profiles

Global Express Report 2010 covers a wide range of the largest and most promising express parcels markets in the world. Using the first hand experience of Ti's analysts, each geographical market overview contains details of some of the key trends and developments.

In addition the report contains profiles of the major European and US express network operators (DHL, TNT, FedEx, UPS, GLS, DPD) as well as a number of the 'local heroes' in some of the less well known markets.

As well as many developed markets, the report looks at India, China, Vietnam, Japan, Brazil, Mexico, Russia and Turkey.



TNT's Asia Road Network

## Essential intelligence for all players in the market

If you are active in the Express & Parcels market in any capacity, you will find Global Express Report 2010 an essential tool for understanding the structure and future of the market as well as the dynamics of the major players.

## How to buy Global Express Report 2010

**Global Express Report 2010**, price £995 can be purchased from the Transport Intelligence website: [www.transportintelligence.com](http://www.transportintelligence.com) or by contacting **Mike Nordmann** on:

**+44 (0)1666 519900**

Alternatively you can email him on [mnordmann@transportintelligence.com](mailto:mnordmann@transportintelligence.com)

# Contents Page

<b>About Transport Intelligence.....</b>	<b>2</b>
<b>Contents Page .....</b>	<b>3</b>
<b>List of Tables and Figures .....</b>	<b>6</b>
<b>1.0 Introduction .....</b>	<b>10</b>
1.1 Definitions .....	11
1.1.1 Time sensitivity.....	11
1.1.2 Size of consignment.....	12
1.1.3 Business to consumer (B2C)/business to business (B2B) .....	12
1.1.4 International/domestic.....	13
1.2 The origins and growth of the industry.....	13
1.2.1 The players in the market .....	16
1.3 DHL in the USA.....	17
1.4 How will the recovery impact on the express industry? .....	18
<b>2.0 The Global Express Market.....</b>	<b>19</b>
2.1 Global Market Size and Growth.....	23
<b>3.0 Integrator Profiles .....</b>	<b>30</b>
3.1 DHL Express .....	30
3.1.1 Finances.....	31
3.1.2 Operations.....	36
3.1.3 Strategy.....	43
3.2 FedEx.....	45
3.2.1 Finances.....	45
3.2.2 2009 Finances 1 <sup>st</sup> Quarter .....	53
3.2.3 Operations.....	57
3.2.4 Strategy.....	71
3.3 TNT .....	76
3.3.1 Finances.....	76
3.3.2 2009 Finances 3 <sup>rd</sup> Quarter .....	87
3.3.3 Operations.....	90
3.3.4 Strategy.....	98
3.4 UPS.....	102
3.4.1 Finances.....	102
3.4.2 2009 Finances Total 3 <sup>rd</sup> Quarter .....	109
3.4.3 Operations.....	112
3.4.4 Operations News .....	117
3.4.5 Strategy.....	122

<b>4.0</b>	<b>Europe</b> .....	<b>124</b>
4.1	Characteristics of the Market .....	124
4.2	Developed Markets .....	125
4.2.1	Spain .....	126
4.2.2	UK .....	129
4.2.3	Germany .....	132
4.2.4	France .....	136
4.2.5	Italy.....	140
4.3	Emerging Markets .....	144
4.3.1	Russia .....	144
4.3.2	Turkey .....	148
4.4	Main European Network Profiles .....	150
4.4.1	DPD Geopost.....	150
4.4.2	General Logistics Systems (GLS).....	154
4.5	Europe Market Size.....	158
<b>5.0</b>	<b>India</b> .....	<b>165</b>
5.1	Characteristics of the Market .....	165
5.2	Main Players .....	166
5.2.1	AFL Ltd.....	166
5.2.2	Blue Dart DHL.....	169
5.2.3	Gati.....	171
5.2.4	UPS Jetair Express Pvt.....	176
5.3	India Market Size .....	177
<b>6.0</b>	<b>Middle East</b> .....	<b>178</b>
6.1	Main Players .....	182
6.1.1	Aramex.....	182
6.2	Middle East Market Size .....	189
<b>7.0</b>	<b>Asia Pacific</b> .....	<b>193</b>
7.1	Characteristics of the Market .....	193
7.2	Japan.....	195
7.2.1	SG Holdings Group (Sagawa) .....	197
7.2.2	Yamato Holdings.....	202
7.3	China .....	210
7.3.1	Beijing ZJS Express (Zhaijisong Express).....	213
7.3.2	Neda Logistics (Guangdong Gangzhong Nengda Express).....	214
7.3.3	SF Express.....	215
7.3.4	STO Logistics (Shentonneg Express and Shentonneg E-logistics).....	216
7.3.5	TTK Express (TTK).....	217
7.4	Vietnam .....	219
7.5	Asia Pacific Market Size.....	222

<b>8.0</b>	<b>Americas .....</b>	<b>227</b>
8.1	USA .....	227
8.2	Canada .....	231
8.2.1	Purolator Courier Ltd.....	232
8.3	Mexico .....	236
8.3.1	Estafeta .....	238
8.4	North America Market Size .....	240
8.5	Latin America .....	245
8.5.1	Brazil .....	246
8.6	Latin America Market Size .....	248
	<b>Contact Transport Intelligence .....</b>	<b>252</b>

## List of Tables and Figures

<b>1.0</b>	<b>Introduction .....</b>	<b>10</b>
	Comparison of US GDP and Domestic Parcels Revenue, Quarterly Growth Year on Year .....	15
	Comparison of US GDP and International Parcels Revenue, Quarterly Growth Year on Year.....	15
<b>2.0</b>	<b>The Global Express Market.....</b>	<b>19</b>
	Global Express: World's Leading Express & Parcels Providers [€m] .....	20
	Integrators' Global Express Volumes – 2008 Number of Items / Packages .....	21
	Global Express: World's Largest Integrators International Market Share % [€m].....	22
	Global Express: Total Market Size 2008 & Forecast 2009 & 2012 [€m].....	23
	Global Express: Total International & Domestic Market Size % to Total [€m].....	24
	Global Express: Total Market Size by Region % to Total [€m] .....	25
	Global Express: Total International Market Size by Region % to Total [€m] .....	26
	Global Express: Total Domestic Market Size by Region % to Total [€m] .....	27
	Global Express: Total International Market Forecast 2009 & 2012 [€m] .....	28
	Global Express: Total Domestic Market Forecast 2009 & 2012 [€m] .....	29
<b>3.0</b>	<b>Integrator Profiles .....</b>	<b>30</b>
	DHL Express Finances: Total [€m] .....	31
	Deutsche Post Finances: 2009 Total 3rd Qtr Revenues 30.09.09. [€m] .....	34
	Deutsche Post Finances: 2009 Express 3rd Qtr Revenues 30.09.09. [€m] .....	35
	Deutsche Post DHL.....	36
	Deutsche Post DHL Divisions .....	36
	Express Operations.....	36
	DHL Express Regions and Products.....	37
	DHL Express Leipzig / Halle Airport International Hub .....	38
	Aerologic Air Network.....	39
	DHL Global Air Hubs and Network.....	40
	FedEx Finances: Total [US\$m] .....	46
	FedEx Finances: Revenue by Business Segment % to Total [US\$m].....	47
	FedEx Finances: Revenue by Geographic Location % to Total [US\$m] .....	48
	FedEx Finances: Express Segment Revenue [US\$m] .....	49
	FedEx Finances: Express Segment - Revenue by Business Sector % to Total [US\$m].....	50
	FedEx Finances: Express Segment - Express Package Revenue % to Total [US\$m].....	51
	FedEx Finances: Express Segment - US Domestic Package % to Total [US\$m].....	52
	FedEx Finances: Ground Segment Revenue [US\$m] .....	53
	FedEx Finances: 2009 Total 1st Qtr Revenues 31.08.09. [US\$m] .....	55
	FedEx Finances: 2009 Express 1st Qtr Revenues 31.08.09. [US\$m].....	56
	FedEx Finances: 2009 Ground 1st Qtr Revenues 31.08.09. [US\$m] .....	57
	FedEx .....	58
	FedEx Reporting Segments .....	59
	FedEx Express .....	60
	FedEx Asia One Network .....	61

FedEx Euro One Network .....	62
FedEx SmartPost .....	63
TNT Finances: Total [€m].....	78
TNT Finances: Revenue by Business Segment % to Total [€m].....	78
TNT Finances: Revenue by Geographic Region % to Total [€m].....	79
TNT Finances: Revenue by Geographic Location % to Total [€m].....	80
Air & Road Volumes 2008 .....	82
Move from Express to Economy Express in 2008 .....	82
TNT Finances : Express [€m].....	83
TNT Finances: Express Revenue by Business Segment [€m] .....	86
TNT Finances: 2009 Total 3rd Qtr Revenues 30.09.09. [€m].....	88
TNT Finances: 2009 Express 3rd Qtr Revenues 30.09.09. [€m].....	89
TNT Organisation Structure .....	90
TNT Express Structure 2008.....	90
TNT Express Hubs .....	91
Pan-European Road Network Depots.....	91
TNT: Pan-European Network.....	92
TNT: India.....	93
TNT: South-East Asia Road Network.....	94
TNT: Middle East Road Network (MERN).....	94
TNT Aircraft .....	95
TNT Airways Fleet Locations .....	96
Networks Portfolio .....	99
UPS Finances: Total [US\$m] .....	103
UPS Finances: Total Revenue by Business Segment % to Total [US\$m] .....	104
UPS Finances: Total Revenue by Geographic Location % to Total [US\$m] .....	105
UPS Finances: US Domestic Package [US\$m].....	106
UPS Finances: US Domestic Package Revenue by Business Segment % to Total [US\$m] .....	107
UPS Finances: International Package [US\$m] .....	108
UPS Finances: International Package Revenue by Business Segment % to Total [US\$m] .....	109
UPS Finances: 2009 US Domestic Package 3rd Qtr Revenues 30.09.09. [US\$m] .....	111
UPS Finances: 2009 International Package 3rd Qtr Revenues 30.09.09. [US\$m].....	112
UPS Global Network .....	113
Package Operations 2008.....	114
Air Hubs.....	114
The UPS Airlines Fleet 2008.....	115
The UPS Technology Infrastructure 2008.....	116
UPS Global Footprint .....	117
<b>4.0 Europe.....</b>	<b>124</b>
Main European Hubs of Integrators .....	125
Global Express: Spain Market Size 2008 & Forecast 2009 & 2012 [€m] .....	127
Global Express: Spain Leading Express & Parcels Providers [€m].....	128
Global Express: UK Market Size 2008 Forecast 2009 & 2012 [€m] .....	129
Global Express: UK Leading Express & Parcels Providers [€m].....	130

Global Express: Germany Market Size 2008 Forecast 2009 & 2012 [€m]	133
Global Express: Germany Leading Express & Parcels Providers [€m]	134
Global Express: France Market Size 2008 & Forecast 2009 & 2012 [€m]	137
Global Express: France Leading Express & Parcels Providers [€m]	138
Global Express: Italy Market Size 2008 & Forecast 2009 & 2012 [€m]	141
Global Express: Italy Leading Express & Parcels Providers [€m]	142
Global Express: Russia Market Size 2008 & Forecast 2009 & 2012 [€m]	145
Global Express: Turkey Market Size 2008 & Forecast 2009 & 2012 [€m]	148
DPD Facts (2008)	150
DPD Germany Facts 2008	152
General Logistics Systems Finances: Total [£m]	155
GLS Network	156
Global Express: Europe Market Size 2008 & Forecast 2009 & 2012 [€m]	158
Global Express: Europe International & Domestic Market Size [€m]	159
Global Express: Europe Total Market Size by Country % to Total [€m]	160
Global Express: Europe International Market Forecast 2009 & 2012 [€m]	161
Global Express: Europe Domestic Market Forecast 2009 & 2012 [€m]	162
Global Express: Europe Leading Express & Parcels Providers [€m]	163
<b>5.0 India</b>	<b>165</b>
AFL Warehouse Network	167
AFL Delivery Destinations Network	168
Blue Dart DHL Finances: Total [INRm]	170
Blue Dart DHL Facts	170
Gati Finances: Total [INRm]	172
Gati Finances: Revenue by Business Segment % to Total [INRm]	173
Gati Facts	174
Warehousing Network	174
Gati Strategic Business Units	175
Gati's Main Customers	175
Global Express: India Market Size 2008 & Forecast 2009 & 2012 [€m]	177
<b>6.0 Middle East</b>	<b>178</b>
Aramex Finances: Total [AEDm]	183
Aramex Finances: Revenue by Business Segment % to Total [AEDm]	184
Aramex Finances: Revenue by Geographic Location % to Total [AEDm]	185
Aramex Finances: International Express Revenue by Geographic Location % to Total [AEDm]	186
Global Express: Middle East Market Size 2008 & Forecast 2009 & 2012 [€m]	189
Global Express: Middle East International & Domestic Market Size % to Total [€m]	190
Global Express: Middle East International Market Forecast 2009 & 2012 [€m]	191
Global Express: Middle East Domestic Market Forecast 2009 & 2012 [€m]	192
<b>7.0 Asia Pacific</b>	<b>193</b>
Global Express: Japan Market Size 2008 & Forecast 2009 & 2012 [€m]	195

SG Holdings Finances: Total [¥m] .....	198
SG Holdings Finances: Revenue by Business Segment % to Total [¥m].....	199
SG Holdings International Network .....	201
Yamato Holdings Finances: Total [¥m] .....	203
Yamato Holdings Finances: Revenue by Business Segment % to Total [¥m] .....	204
Yamato Holdings Finances: Revenue by Geographic Location % to Total [¥m] .....	205
Yamato Holdings Finances: Delivery Business Segment [¥m] .....	206
Yamato Holdings Finances: Delivery by Business Segment % to Total [¥m].....	207
Global Express: China Market Size 2008 & Forecast 2009 & 2012 [€m] .....	210
ZJS Express Finances: Total [CNYm].....	213
TTK Express Facts .....	218
Global Express: Vietnam Market Size 2008 & Forecast 2009 & 2012 [€m] .....	219
Global Express: Asia Pacific Market Size 2008 & Forecast 2009 & 2012 [€m] .....	222
Global Express: Asia Pacific International & Domestic Market Size % to Total [€m] .....	223
Global Express: Asia Pacific International Market Forecast 2009 & 2012 [€m].....	224
Global Express: Asia Pacific Domestic Market Forecast 2009 & 2012 [€m] .....	225
Global Express: Asia Pacific Total Market Size by Country % to Total [€m] .....	226
<b>8.0 Americas .....</b>	<b>227</b>
Global Express: US Market Size 2008 & Forecast 2009 & 2012 [€m].....	227
Global Express: US Leading Express & Parcels Providers [€m] .....	229
Global Express: Canada Market Size 2008 & Forecast 2009 & 2012 [€m] .....	231
Purolator Courier Finances: Total [C\$m].....	233
Purolator Courier Finances: Revenue by Business Segment % to Total [C\$m].....	234
Global Express: Mexico Market Size 2008 & Forecast 2009 & 2012 [€m] .....	236
Estafeta Facts.....	238
Global Express: North America Market Size 2008 & Forecast 2009 & 2012 [€m].....	240
Global Express: North America International & Domestic Market Size % to Total [€m] .....	241
Global Express: North America Total Market Size by Country % to Total [€m].....	242
Global Express: North America International Market Forecast 2009 & 2012 [€m] .....	243
Global Express: North America Domestic Market Forecast 2009 & 2012 [€m] .....	244
Global Express: Brazil Market Size 2008 & Forecast 2009 & 2012 [€m].....	246
Global Express: Latin America Market Size 2008 & Forecast 2009 & 2012 [€m].....	248
Global Express: Latin America International & Domestic Market Size % to Total [€m].....	249
Global Express: Latin America International Market Forecast 2009 & 2012 [€m] .....	250
Global Express: Latin America Domestic Market Forecast 2009 & 2012 [€m] .....	251