Public and Contract Warehousing Trends and Value Added Services 公共仓储与合同仓储-发展趋势与增值服务

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Agenda

- Outsourcing 外包/ Definitions
- Value Added Services 增值 仓储
- Warehousing 仓储 in China
- Outsourcing 外包 in the US
- Trends 趋势
- Areas of Opportunity 机会
- Acquisitions & Mergers
- Contract Lengths

What Is Outsourcing? 什么是外包？

Having Someone conduct a service which you would otherwise need to provide yourself.

让别人负责管理一项本应由您自己负责的服务。

That someone not being otherwise associated with you.

这个别人不可以是您的同行。

Traditionally this amounts to the contracting out of support or assessorial activities.

传统意义上来说，您不能对这个合同的签约方提供任何支持或评估。

Third Party Services 第三方服务

• Distribution	•配送
• Installation & Setup	•安装
• Reverse Logistics	•逆向物流
• Global / Import & Export	•国际/进口及出口
• Personnel	•人事
• Transportation	•运输
• Packaging/Labeling	•包装/贴标
• Sourcing	•采购

Types of Outsourcing 外包的类型

Third-party warehousing is normally divided into two categories:

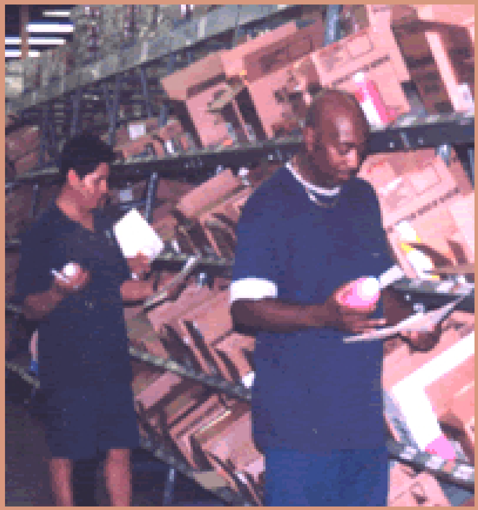
第三方仓储一般可以分为两类：

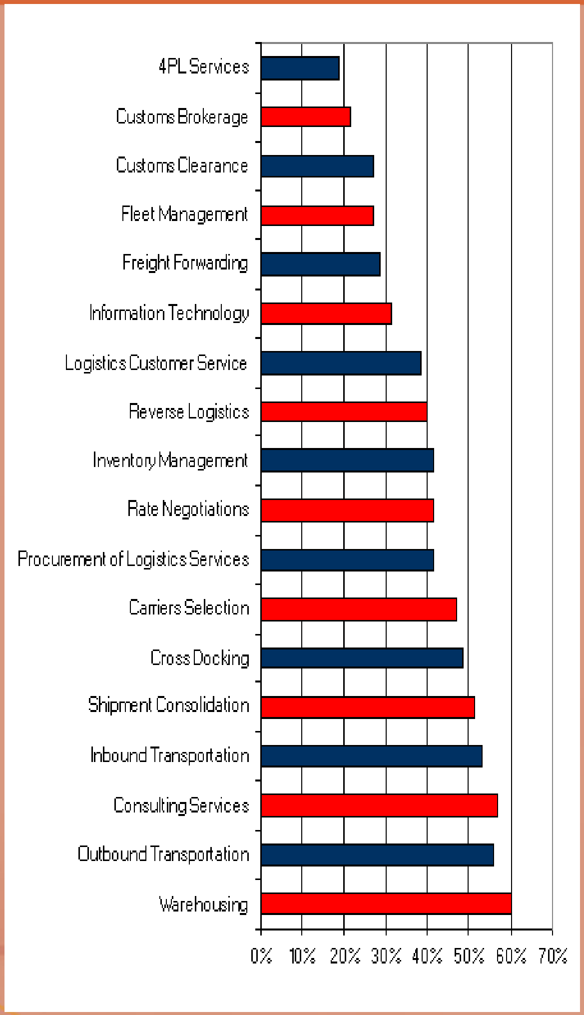
- **Public warehousing**
- **Contract warehousing**

•公共仓储

•合同仓储

Value Added 增值





Warehouse Services Trends

仓储 服务 趋势

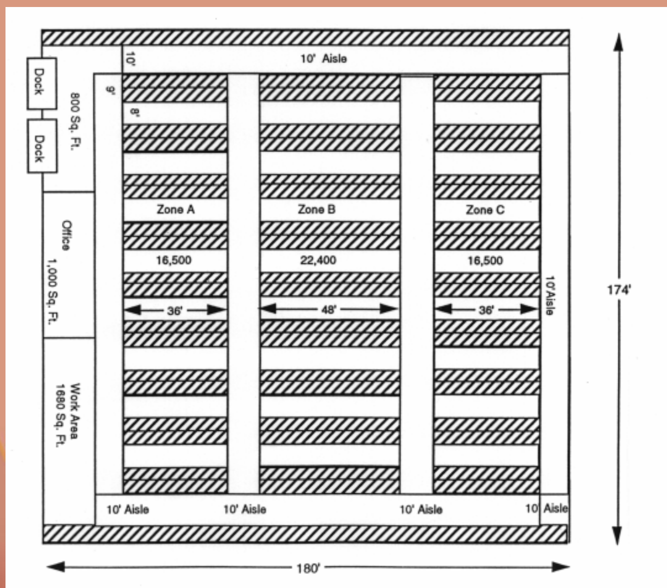
Trending To More Value Added Services

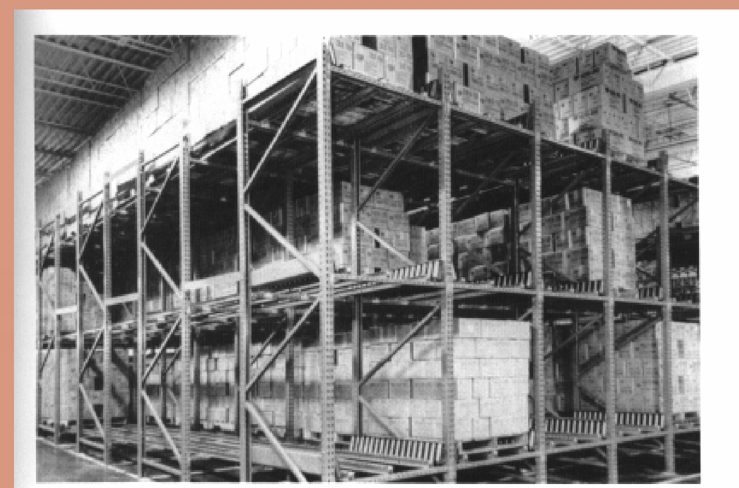
Outsourcing 外包 in China

A Changing Market in China

Logistics is Changing in China

It used to be all about storage 存储





Zone A	16,500
Zone B	22,400
Zone C	16,500
Wall Area	9,200
Bridging	3,100
Total	67,700

World Class Warehousing in China

Top Thirty 3PL's in China

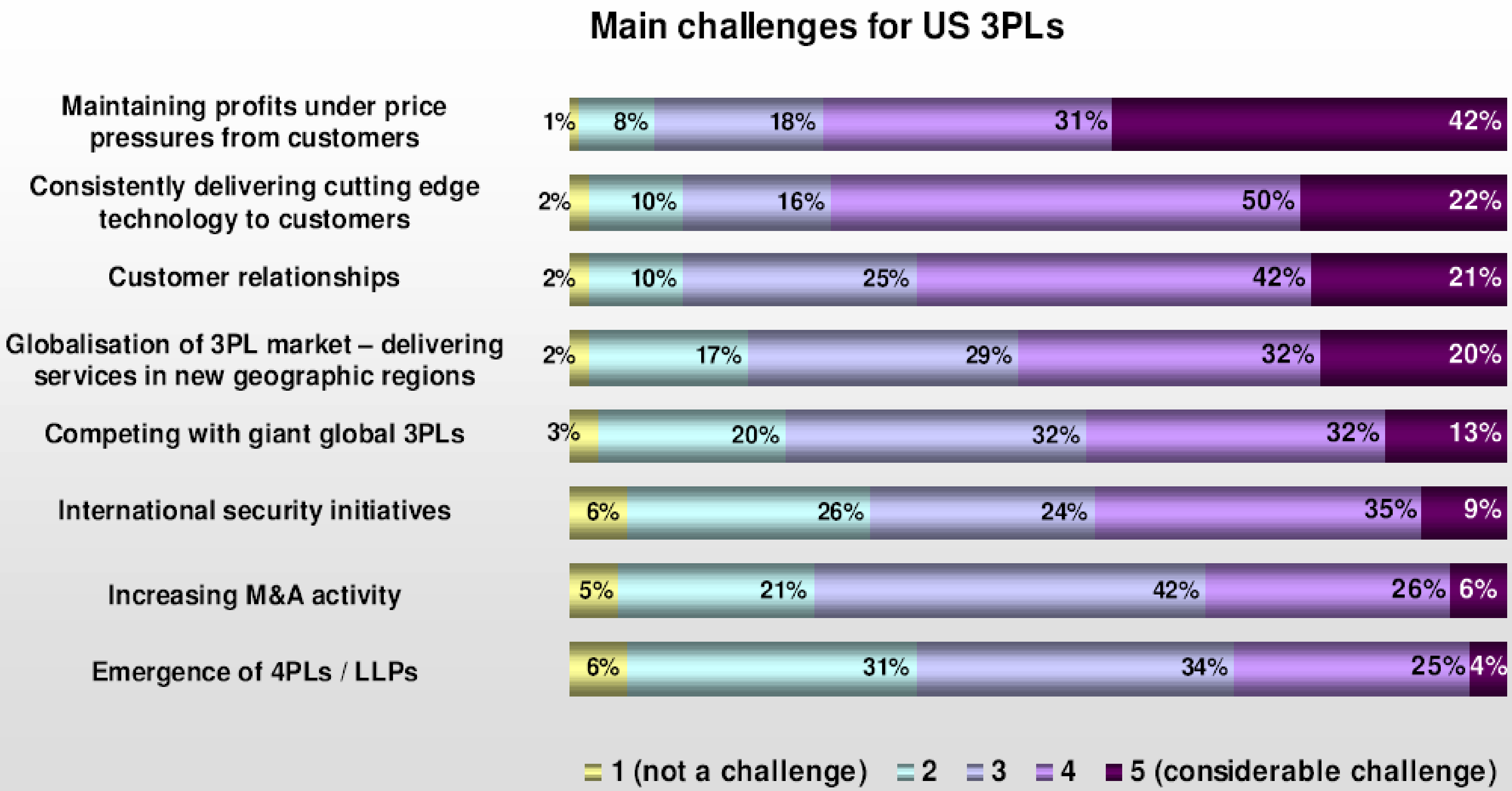
Place	Company Name
1	COCSCO Logistics Ltd.
2	China Postal Logistics Co., Ltd..
3	JC International Logistics Group Co., Ltd.
4	Heilongjia Provincial Huayu Logistics Group Co., Ltd.
5	Guangdong Postal Logistics Distribution Service Co., Ltd.
6	China Shipping Logistics Co., Ltd.
7	Anji - TNTAuto Logistics Co., Ltd
8	EAS International Logistics Co., Ltd.
9	Tianjin Datian Group Co., Ltd.
10	China Material Warehousing and Transportation Co., Ltd.
11	JHJ International Transportation Co.
12	Sinotrans-Yue Lee Logistics, Ltd.
13	China Railway Container Transportation co., Ltd.
14	CHINA AIR EXPRESS CO., Ltd.
15	Tianjin Zhehua Logistics Group
16	China Railway Sepcial Cargo Service Co., Ltd.
17	Shanghai Jiaji Express Co., Ltd.
18	Tsingtao Haier Logistics Co., Ltd.
19	Tsingtao Transportation Group
20	ShenzhenTempus Logistics Co., Ltd.
21	China Railway Express Co., Ltd.
22	South Logistics Co., Ltd.
23	China Railway Modern Logistics Technology Co., Ltd.
24	PG Logistics Group Co., Ltd.
25	Shenzhen EH Supply Chain technology Co., Ltd.
26	Guangzhou Haiyuan Logistics Ltd.
27	Shanghai Ba-shi Yuexin Logistics Development Co., Ltd.
28	China Container Holding Group Company
29	China Southern Airlines
30	China Merchants Logistics Group Co., Ltd.

Source: China Association of Transportation and Communications, 2004.

US Outsourcing 外包

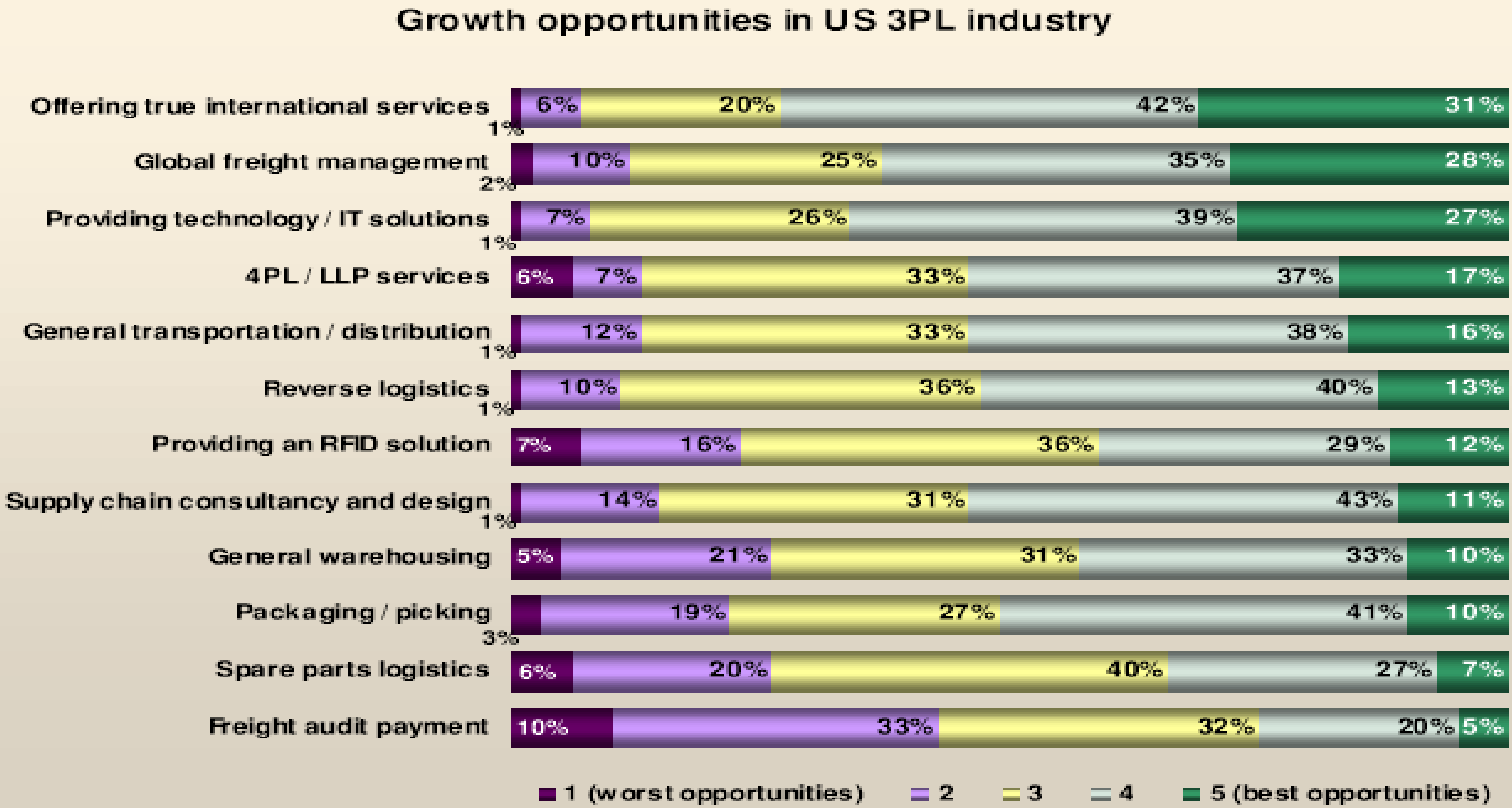
Outsourcing Trends in the US Market

Main Challenges for US 3PLs



Source: North American 3PL Market Report, April 2007

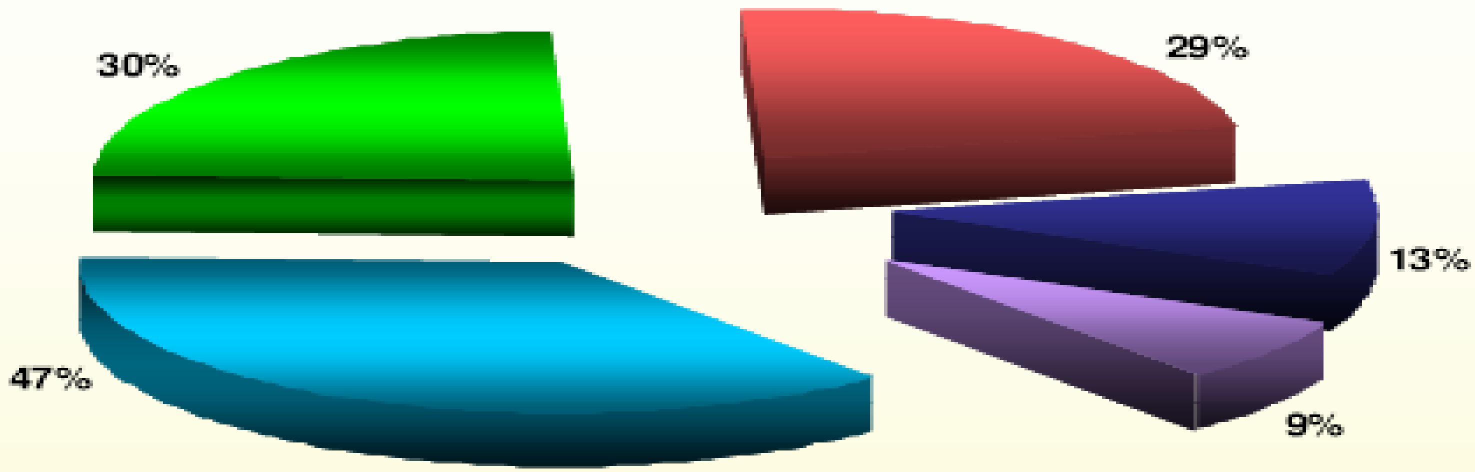
Growth Opportunities in US 3PL Industry



Source: North American 3PL Market Report, April 2007

Geographic Growth Strategies

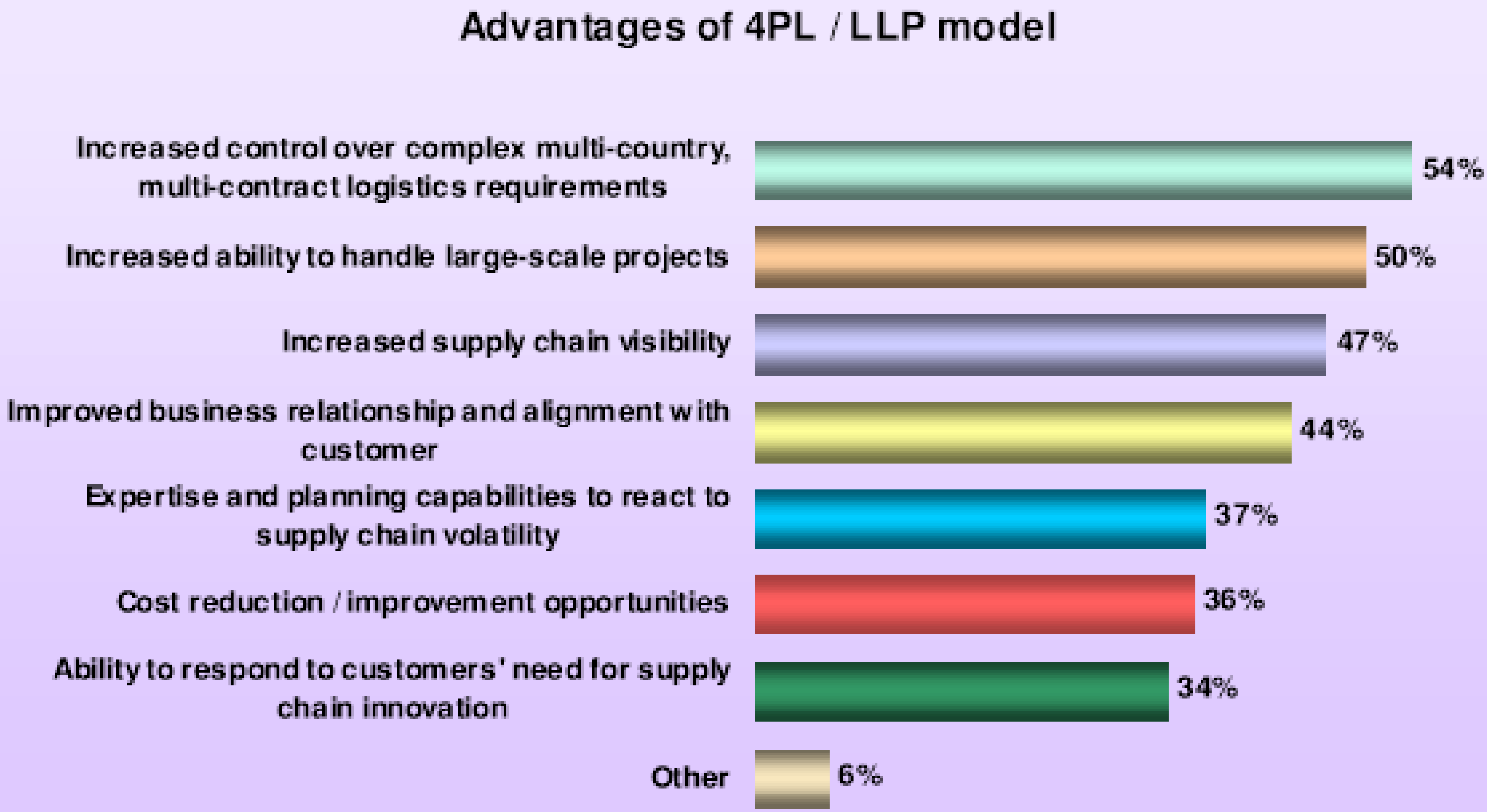
Strategy for expansion into new geographical regions



- We are entering new geographical markets when our customers do
- We are pro-actively investing in distribution networks and distribution centres in new geographical markets before customers have actually demanded it
- We are acquiring local logistics / transport providers in new geographical markets to expand our network in those areas
- We are not expanding into new areas
- Other

Source: North American 3PL Market Report, April 2007

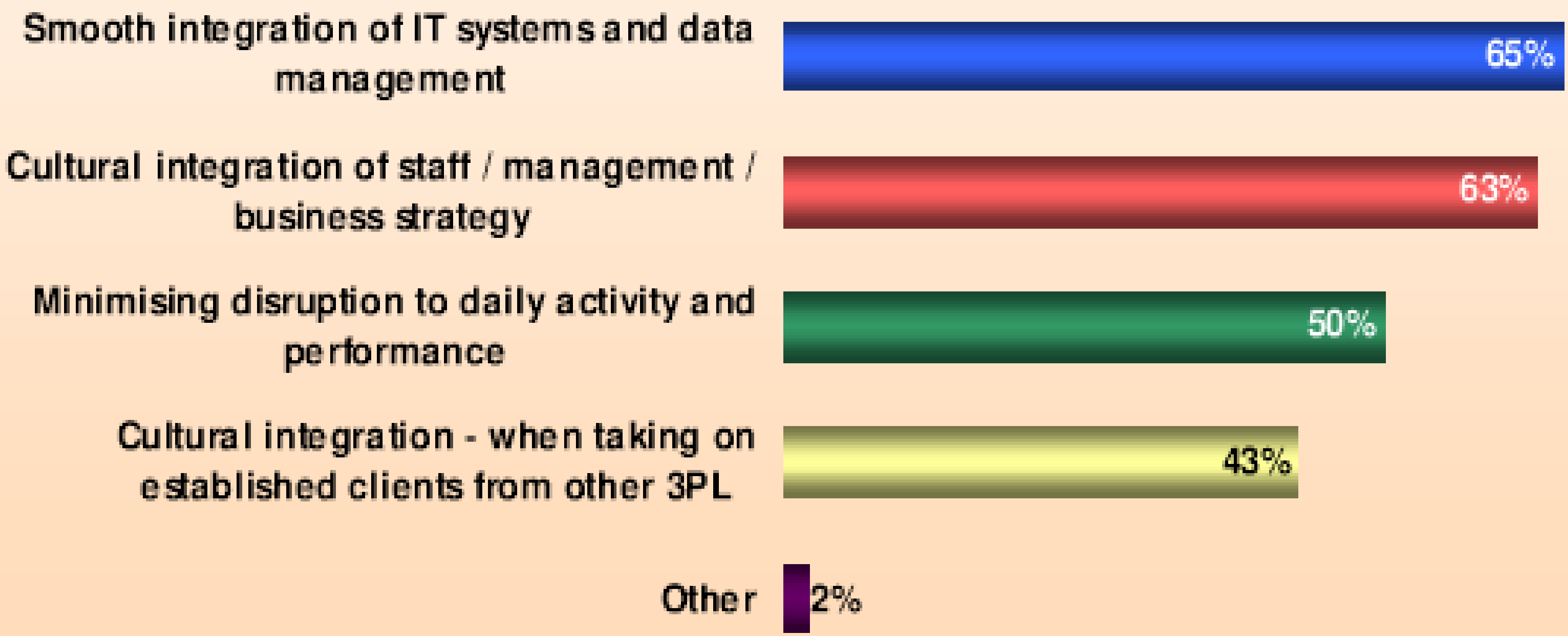
4PL / LLP Strategies



Source: North American 3PL Market Report, April 2007

Acquisition Risks/Challenges

Key acquisition challenges

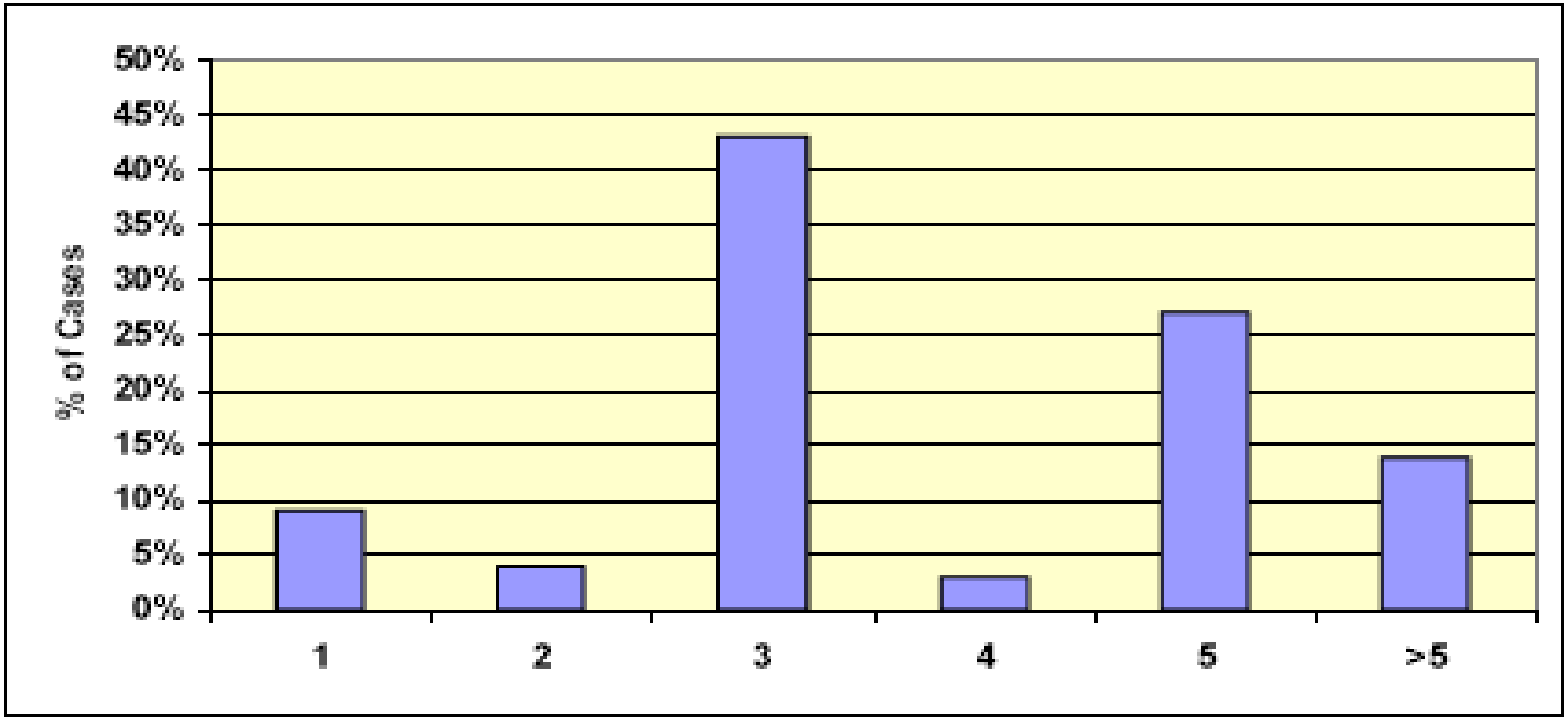


Source: North American 3PL Market Report, April 2007

Users Concerns

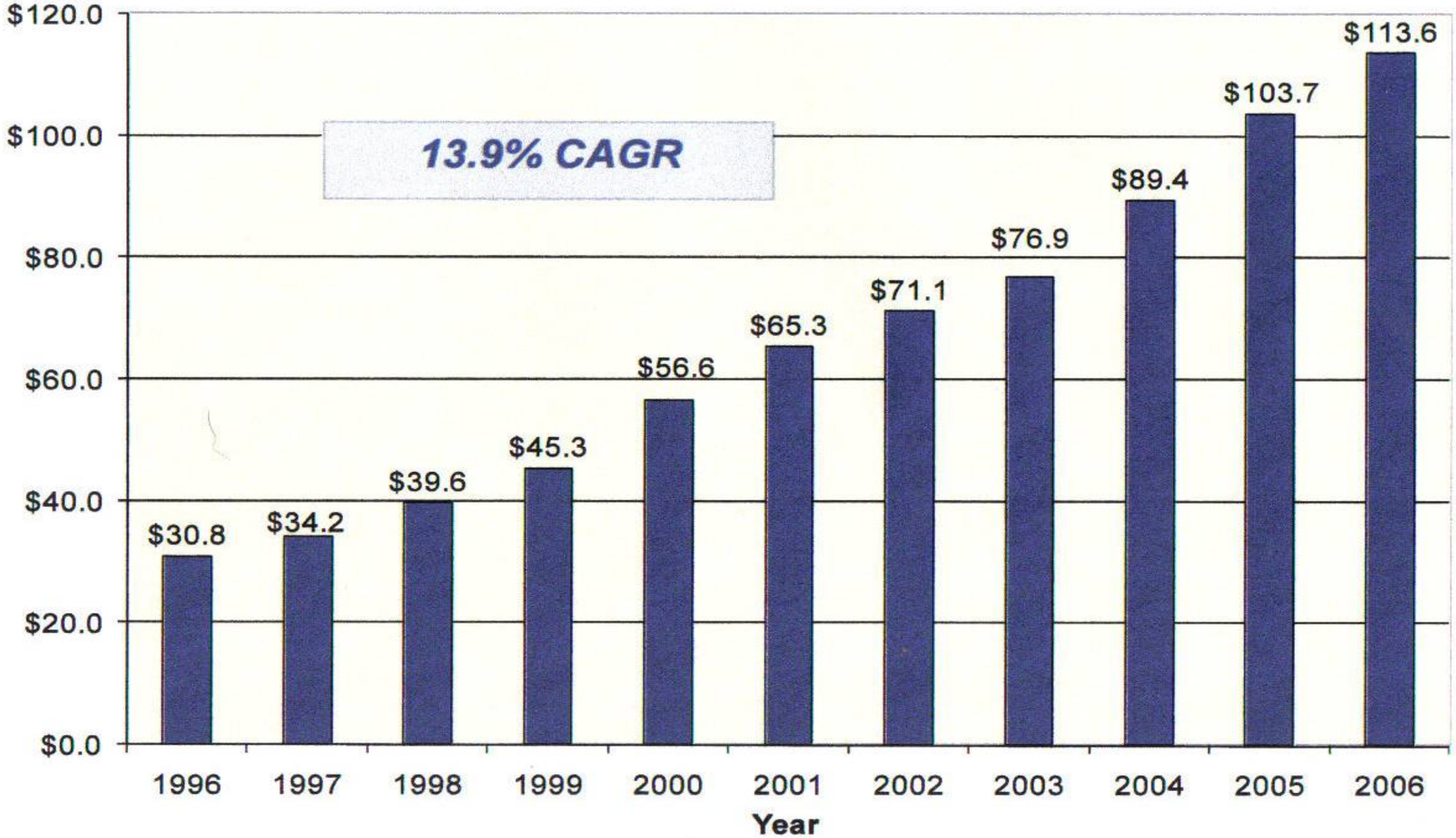
Source: North American 3PL Market Report, April 2007

Warehouse Contract Length



Source: Armstrong & Associates, Inc. White Paper: "An Overview of Warehousing in North America – Market Size, Major 3PLs, Benchmarking Prices and Practices ".
Sample Size Information: Contract 258 locations, > 800 Customers. Public176 locations, > 1,700 customers.

U.S. 3PL Market 1996 to 2006
($ Billions)



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Top 25 North American 3PL companies based on Net Revenues			
	Company	Revenues - Gross ($ mln)	Revenues - Net ($ mln)
1	UPS Supply Chain Solutions	1,514	1,514
2	Ryder	1,877	1,463
3	Exel	2,407	1,293
4	Schneider	1,194	1,194
5	DHL Danzas Air & Ocean	1,358	1,168
6	Caterpillar Logistics Services	1,750	1,050
7	Penske Logistics	2,459	1,048
8	Menlo Worldwide	1,576	1,000
9	NYK Logistics (Americas)	997	997
10	Tibbett & Britten Group Americas	948	948
11	TNT Logistics North America	754	754
12	Expeditors International of Washington Inc	2,624	735
13	APL Logistics	975	693
14	J.B.Hunt Transport Services Inc.	671	671
15	USCO/Kuehne & Nagel	1,890	645
16	Fedex -Supply Chain Services	603	603
17	UTI Worldwide, Inc	1,503	596
18	Ruan	620	580
19	AmeriCold Logistics Inc.	700	575
20	C.H. Robinson	3,437	545
21	Nippon Express USA, Inc.	6,540	527
22	north American Logistics	941	499
23	EGL Eagle Global Logistics	735	479
24	BAX Global Supply Chain Management	976	464
25	Genco	409	320

Source: eyefortransport

Trends in Outsourcing
趋势 外包

The Direction for Tomorrow

Global Estimates of 3PL Revenue – 2006

($ Billions)

	Gross Revenue	Net Revenue	ITM	Contract Logistics
U.S.	114	53	42	72
Europe	139	68	41	98
Japan	37	17	7	30
China	30	15	10	20
Other Asia Pacific	18	9	6	12
Other Americas	24	12	8	16
Other	29	14	10	19
Totals	391	188	124	267

Global 3PL Market penetration is low, but growing.
3PL Penetration is 20% in Europe, 17% in US and lower in Other countries.

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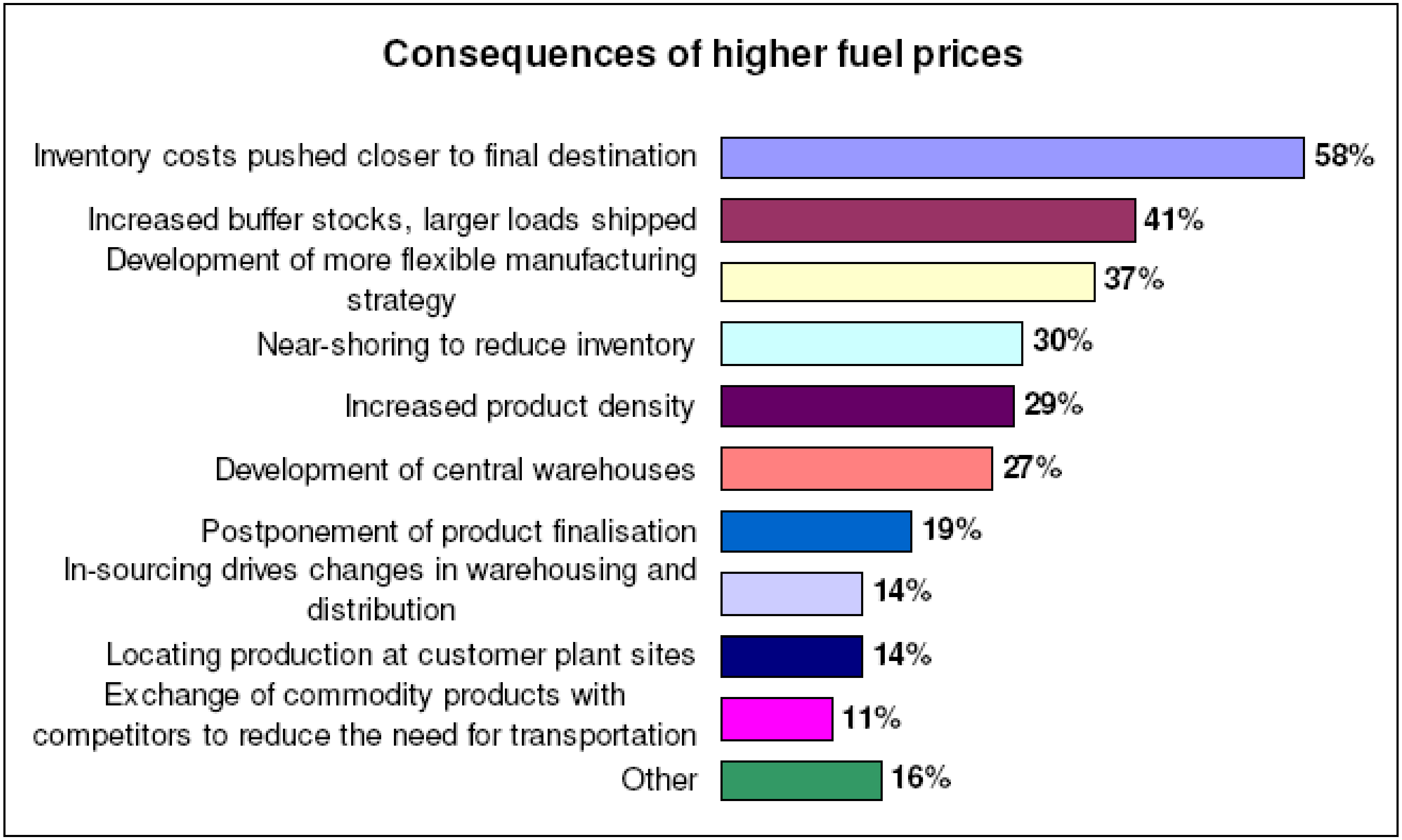
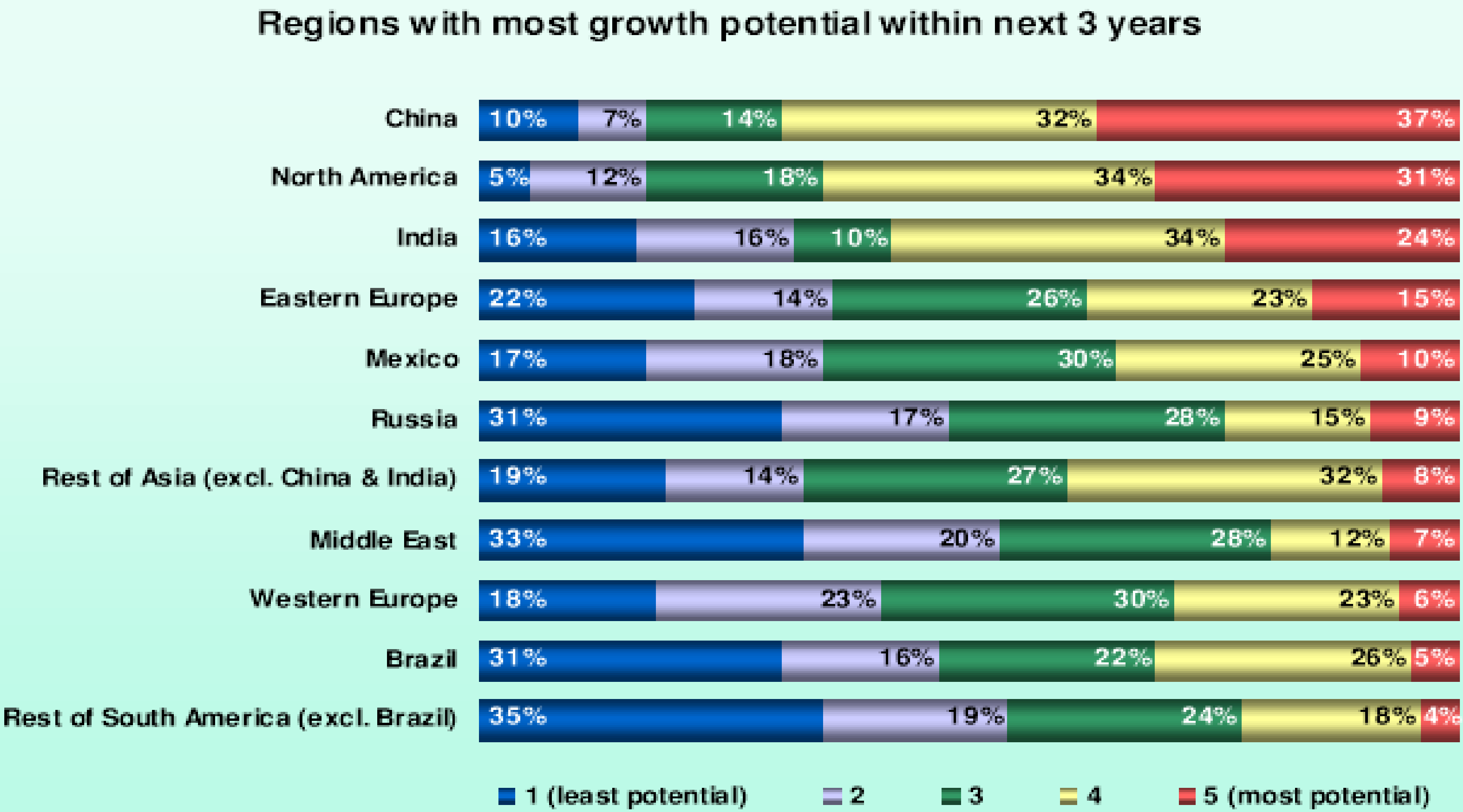
Consequences of Rising Fuel Costs



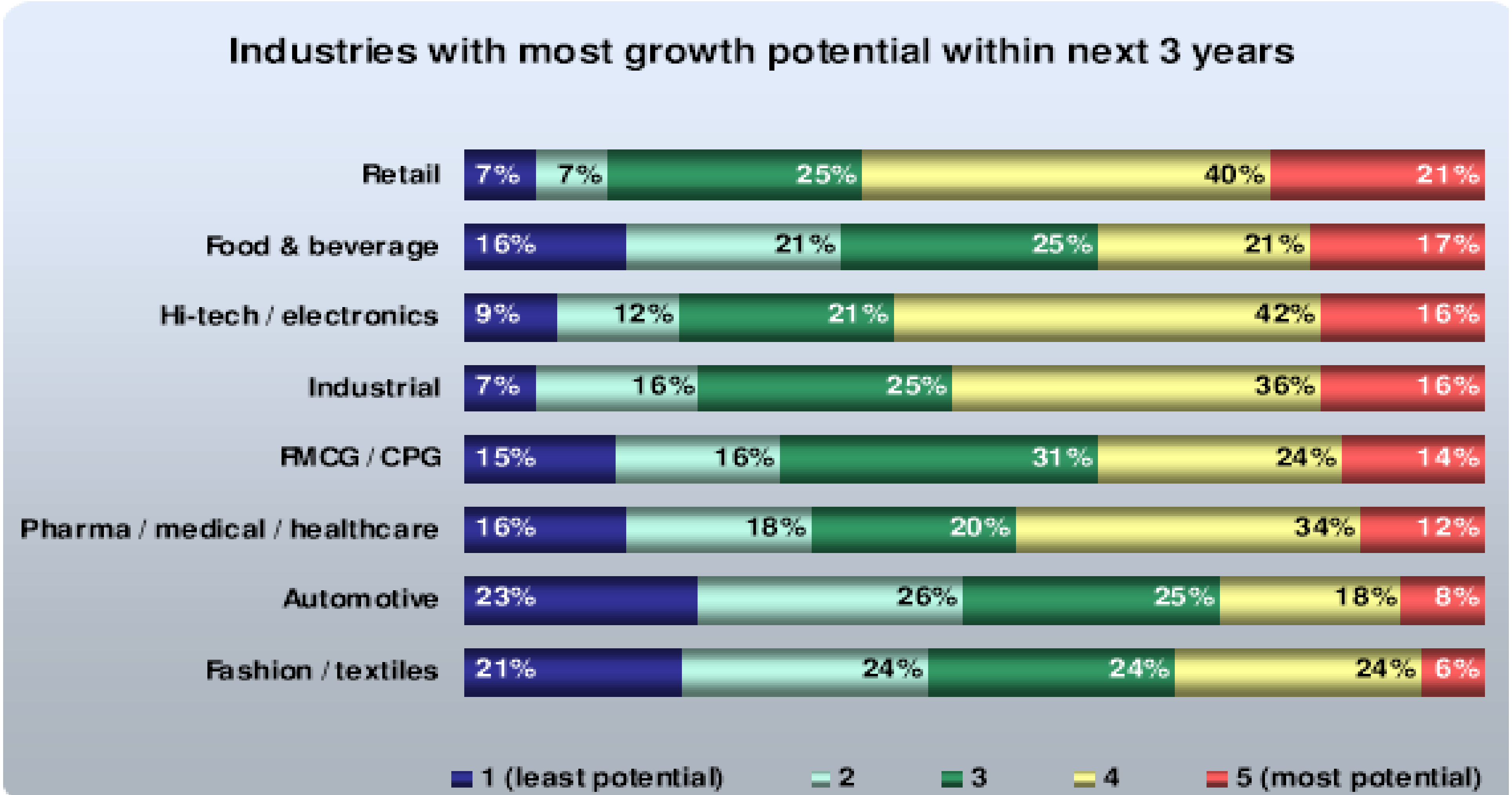
Source: eyefortransport Fuel Pricing Report, August 2008

Regions With Most Growth Potential



Source: North American 3PL Market Report, April 2007

Industries With Most Growth Potential



Source: North American 3PL Market Report, April 2007

Key Reasons for Non-Renewals

Source: North American 3PL Market Report, April 2007

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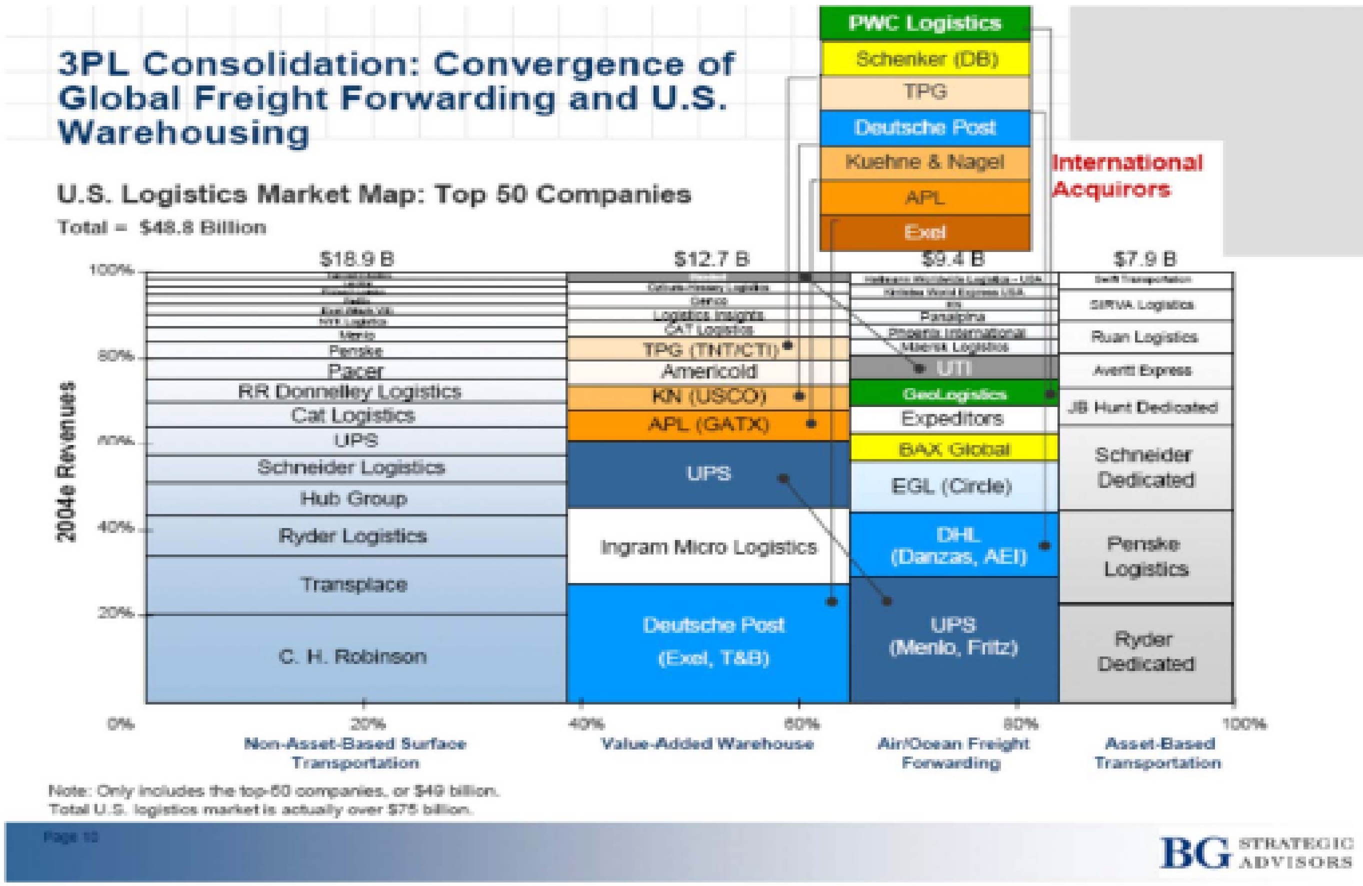
Trends Influencing Warehousing

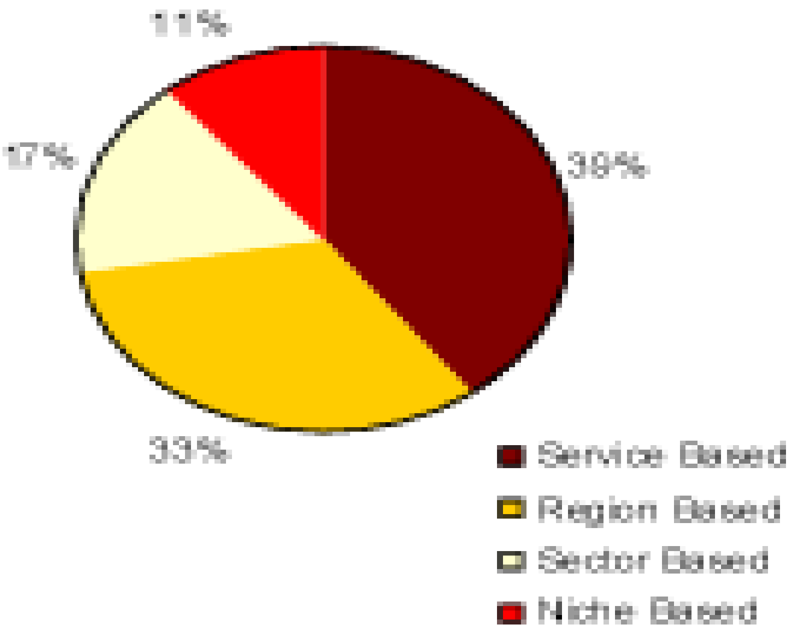
- Industry Landscape Changing….



MURPHY WAREHOUSE COMPANY

Consolidation – a major market driver

3PL M&A Break Down



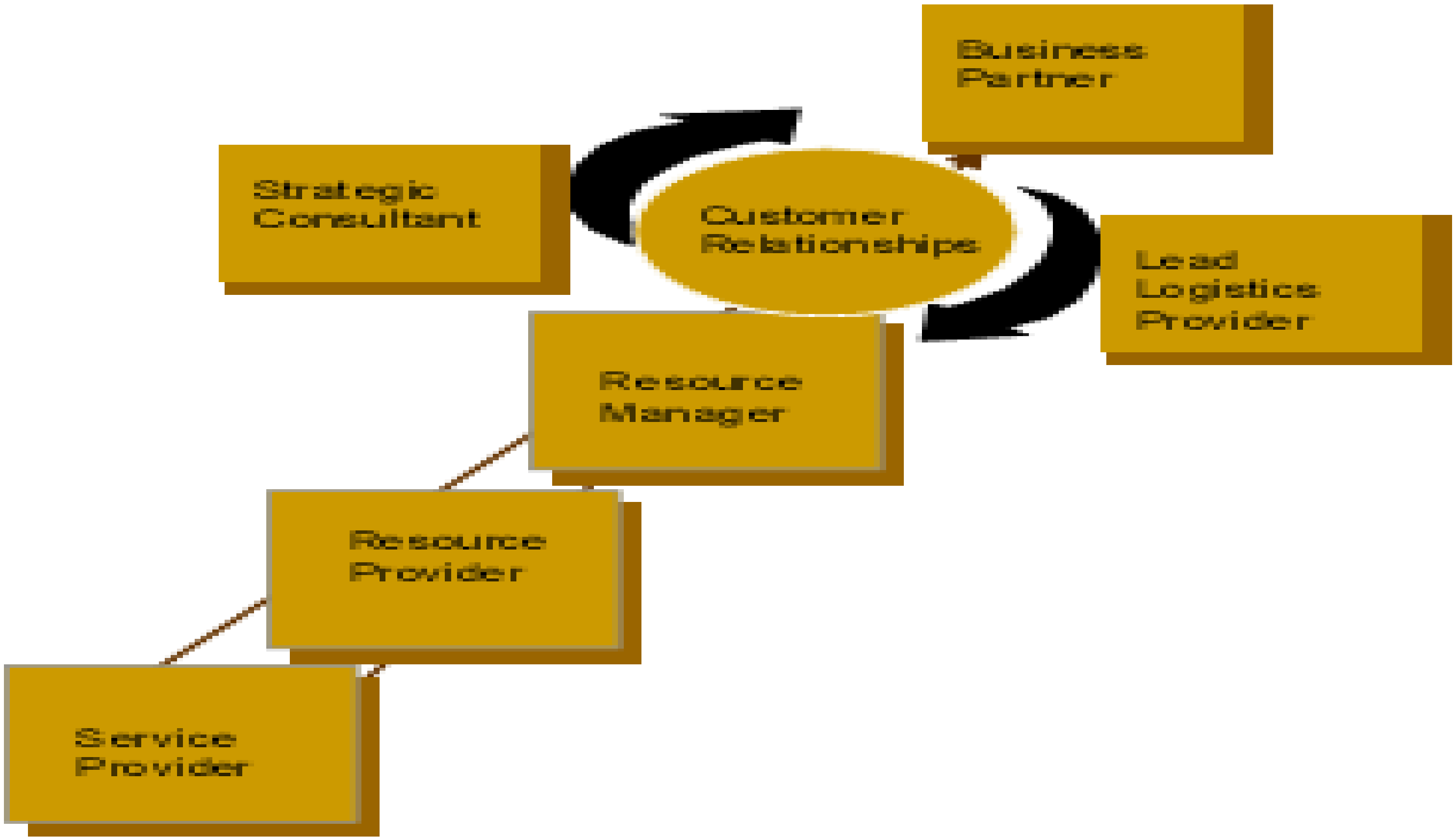
Of the 83 recent M&A transactions analyzed, 39% are services based, 33% are region based, 17% are sector based and 11% towards growth in niche segment.

The largest acquisitions are asset based, followed by service based and then regional based. Non-asset based players are acquiring asset based players and vice versa, for effective risk management.

Source: eyefortransport

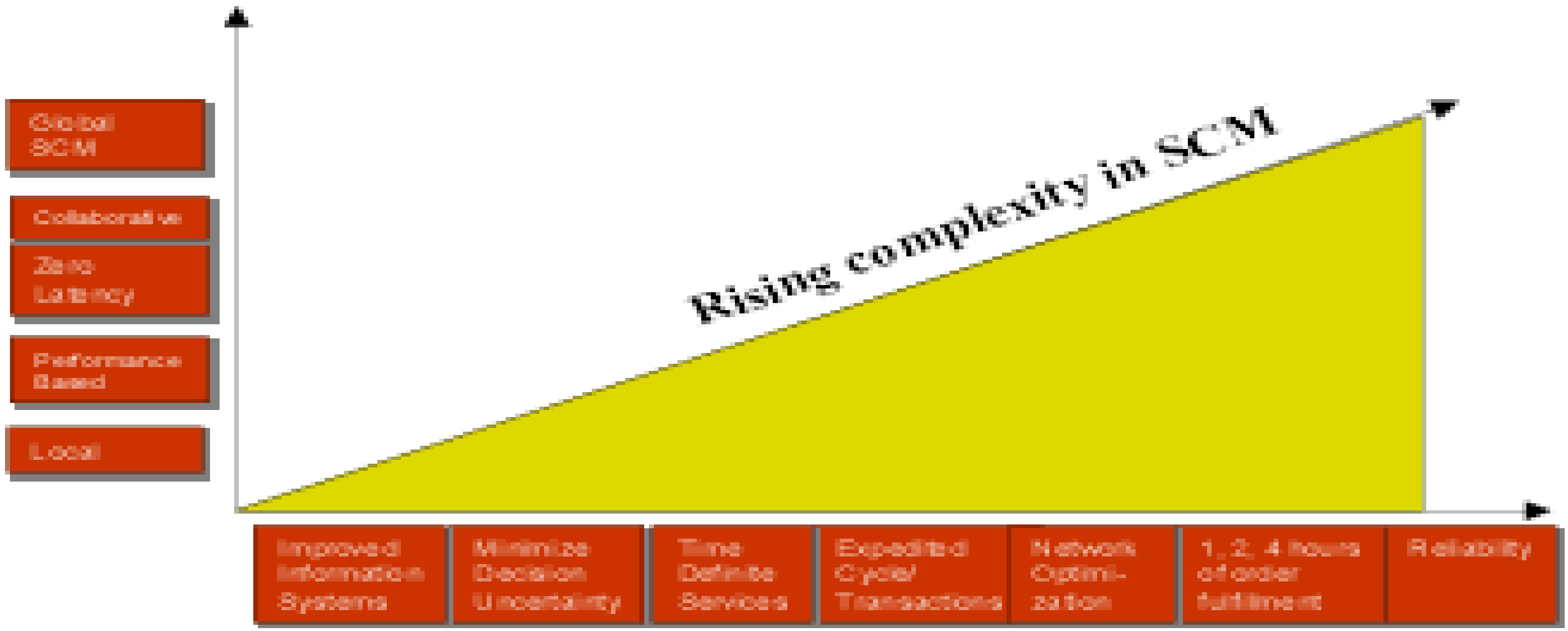
The Future of the 3PL Industry

The new 3PL playing field – Where the future winners can be found



Source: eyefortransport

Evolving Supply Chains – increasing complexities



Source: eyefortransport

Questions 问题

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