



CHINA WAREHOUSING & TRANSPORTATION SURVEY

中国仓储货运调查





INTRODUCTION 引言

Growing wealth, globalization, a decline in export-led manufacturing and government stimulus measures are all driving shifts in China's economy and in turn, the country's logistics sector. Since China opened its logistics sector in 2006 in line with WTO, foreign companies have lined up to enter the market. The environment they entered in the early years was immature relative to that of their own countries and filled with challenges such as high infrastructure costs, a workforce that didn't understand the role of logistics in adding value to a multinational operation, and a market focused largely on price as a decision driver.

To gain a better reading of China's logistics climate, the Global Supply Chain Council, in partnership with FM Logistic, conducted the Warehousing and Transportation Survey in the spring of 2009. The survey results support what many of the Council's community have suggested in their writings, presentations and informal comments: The logistics sector is aligning rapidly with global standards.

One of our two key findings shows that service quality is now valued more highly than price. And efficiency, as measured by the cost of logistics as a percentage of sales, may also be higher than what is commonly believed about the sector in China. The average of our respondents' reported costs, about 10%, is much lower than commonly cited estimates of China logistics costs as a percentage of GDP. While our sample in this survey is not representative of the China logistics sector as a whole (an English-language survey is by definition skewed toward international companies, which likely exhibit more operational efficiency than totally local entities), this finding points at something potentially dramatic: China's logistics sector may in fact be far more efficient than common assumptions hold. This finding clearly deserves more investigation.

中国的经济不仅是在快速成长，在经济结构上也不断发生着变化。中国人民的日益富裕，经济全球化，出口导向型制造业的弱化，以及中国政府刺激经济的手段都在推动深刻的行业改变。物流行业也受这种趋势的影响。自从中国于2006年应WTO要求开放物流行业，许多外企纷纷涌入中国市场。当时他们面对的经济环境是相对不成熟并充满挑战，例如高昂的基础设施成本，公司的员工也没有充分理解物流价值链在跨国合作中的增值效用，同时当时的市场几乎完全以价格作为决策的基础。

为了更清楚地了解现今中国的物流市场环境，全球供应链理事会与FM物流有限公司共同合作策划了“2009仓储与运输调查”，结果证实了大多数协会成员的观点：物流业正逐渐与国际标准接轨，尤其是服务质量现在远比价格更受到顾客的重视。

对我们调查的回应显示 中国物流行业的实际效率 比一般相信的更高 其中物流成本在销售中的比例比只估大约10% 只有一般常用估计成本的60% 虽然我们的调查并不代表整个中国物流领域的现状（因为英文版本的调查主要以跨国企业为主，所以得出的运营效率数据往往比国内企业要略高一点），这些调查数据可以说是比较出乎意料的：中国的物流业实际上也许远比一般认为的更高效得多 因此这个有趣的发现非常值得未来更进一步的调查。

RESEARCH METHOD 研究方法

We surveyed the Global Supply Chain Council's member base and greater community, and received 125 valid responses. Eliminating incomplete answers from our analyses, we asked for responses in a variety of formats, from multiple choice and open-ended responses to rankings on a one-to-five scale. An indication of the interest of our respondents in this research: 70 of them provided their names and contact details, in exchange for the full data from the survey.

Nearly half of the valid responses came from supply chain or logistics directors or managers, with an additional 15% coming from managing directors, general managers or chief representatives. Survey respondents represented a wide range of industrial sectors—20% from the logistics services and equipment category, and 11% each from the automotive and retail/distribution sectors. The high tech and electronics, industrial equipment, electrical and appliances, clothing and textile, food and beverage, and healthcare sectors were also well represented.

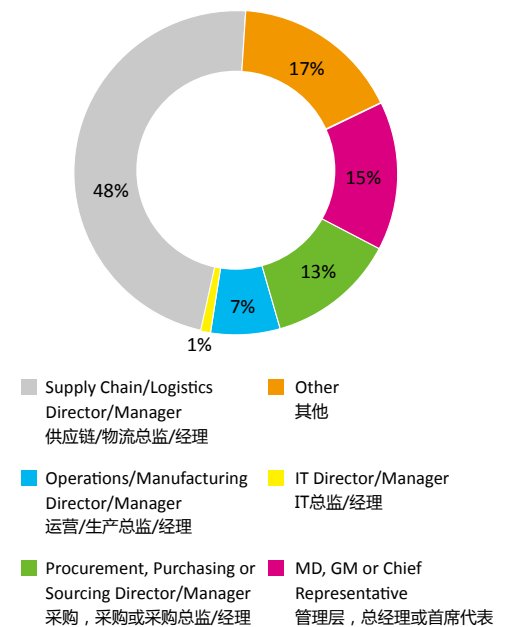
We asked a number of questions aimed at gaining an understanding of the operating environment, and others aimed at understanding the strategies and perceptions likely held by leaders in the supply chain sector. The following sections of the report are arranged accordingly.

我们调研了全球供应链理事会的会员及相关的大量团体/组织的成员。去掉无效的问卷，我们得到了125份有效的回复。这些回复是以不同形式出现的，有多选题，开放式的问答题，以及1-5的分级式评定。一个小细节可以表明受访者对这个调查的兴趣度：有70个人选择留下自己的名字和联系方式，来交换调查结果的相关数据。

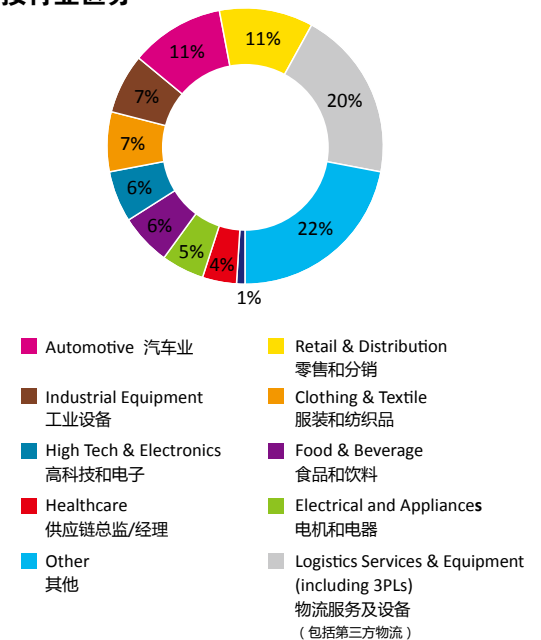
接近半数的有效回复来自供应链和物流的总监或经理，另外还有15%来自常务董事，总经理或首席代表。受访者代表了许多行业部门—20%来自物流服务及设备类，11%分别来自汽车和零售分销业。高科技和电子，工业设备，电机和电器，服装和纺织品，食品和饮料，和医疗行业也有诸多代表参加。

我们通过一些问题来了解目前的营运环境，并理解供应链行业领导者的战略构想和观念。文章的以下几个部分会有相应的阐述。

Respondents by Role 根据受访者角色区分



Respondents by Industry Sector 按行业区分



THE OPERATING ENVIRONMENT 营运环境

10%

average logistics cost
as a percent of sales

The commonly cited figure of logistics costs in China is approximately 18% of GDP, significantly higher than costs in Europe and North America, which are estimated to be in the range of 8-10%. Our survey's finding that logistics costs as a percent of sales are about 10% is startling; it suggests that China's logistics climate may have shifted even more dramatically in recent years than previous research indicates. Our surveyed companies report efficiency levels comparable to those in Europe or North America.

Warehouse/distribution center costs represent the largest single logistics cost for our respondents, several percentage points more than outbound customer transportation costs. A look into two of the best-represented industry sectors (auto and retail) reveals that those from the auto sector report ten percent less 'outbound customer transportation' than those from the retail sector report, and substantially more intra-company transportation costs—reasonable, since an auto-sector entity is moving greater weight and volume around inside the organization.

物流成本：权威数据表明，中国的物流成本大约占GDP的18%，明显高于欧洲和北美的成本比例（8-10%）。我们的调查表明物流成本占销售成本的比例居然达到了10%，可见中国的物流运作环境在近几年发生着巨大的变化，许多公司也发现相对于欧洲和北美，我们在成本和效率上的差距。

大多数受访者表示仓库/配送中心的成本是最大的一笔开支，大概要比运输成本多几个百分点。根据最具代表性两个行业（汽车和零售）调查对比显示，汽车业的对客户的运出成本比零售业要低10个百分点，而公司内部的运输费用却比零售业高一这个结果是合理的，因为汽车业需要在企业内部运送体积和重量都较大的货品。

Logistics Costs by Category 按物流成本类别

- Outbound customer transportation 运出服务
- Warehouse/distribution center 仓储和配送中心
- Intra - company transportation 企业内部
- Management activities and overhead 其他管理行为
- Packaging/labeling and other value-added components 包装，标签和其他加组件

	Outbound	warehouse	Intra	Overhead	Label
Retail	28%	17%	29%	17%	10%
Auto	17%	19%	34%	16%	14%
All Sectors	25%	20%	30%	13%	10%

Transportation Mode 运输方式:

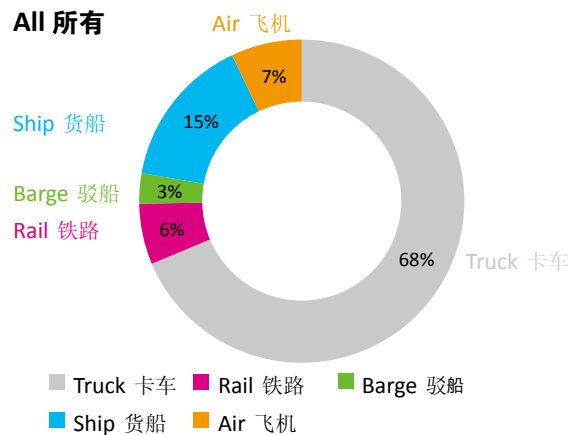
Not surprisingly, trucking is dominant (68%) among the various transportation modes offered as choices. Factoring out two industry sectors (auto and logistics services/equipment providers – together nearly one third of our total respondents), trucking becomes even more dominant (75%), while ship declines to less than 10%. Auto sector respondents indicate that more than 50% of their transport is by ship (by far the largest ship users by sector), no doubt reflecting not only the volume of export-oriented production in the sector, but a vehicle's weight, which eliminates air transport as a viable option. Logistics services and equipment providers indicate a heavier use not only of ship (25%), but also of air transport (21%), likely reflecting the export-oriented nature of their sector.

陆运在可选择的运输方式中是占绝对的主导地位（68%）。而扣除汽车业以后，物流服务和设备行业的受访者（占有受访者的三分之一）的调查显示，陆运是处于更加重要的地位（75%），而海运只占了不到10%。汽车行业的受访者表示超过50%的运输时交由海运（海运最大的行业用户）。由此可见，汽车业出口导向的生产量比较大，而且由于货物的重量，不可能选择空运方式运输。物流和设备服务商对海运和空运的使用较汽车业为高（分别为25%和21%），应是反映出了该行业出口导向性质对运输方式的影响。

	Truck 卡车	Rail 铁路	Barge 驳船	Ship 货船	Air 飞机
All 所有	68%	6%	3%	15%	7%
Auto 汽车	36%	4%	1%	54%	4%
Logistics service providers 物流服务和设备供应商	41%	12%	2%	24%	21%

Logistics Use by Mode 物流方式的选择

All 所有



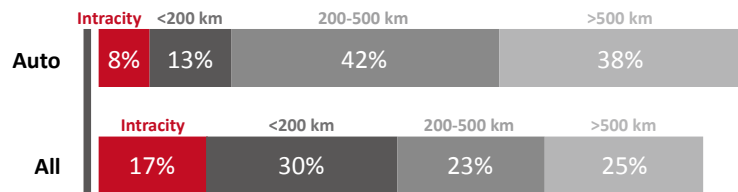
Distances Covered to Deliver Goods 物流成本:

As with transport mode, the auto sector stands out in terms of distances covered to deliver goods, with a substantially higher percentage of long-distance transport, no doubt reflecting that auto manufacturing is concentrated in fewer but larger manufacturing centers, while other sectors source and deliver from a much larger number of manufacturers, more widely dispersed and therefore closer to end users.

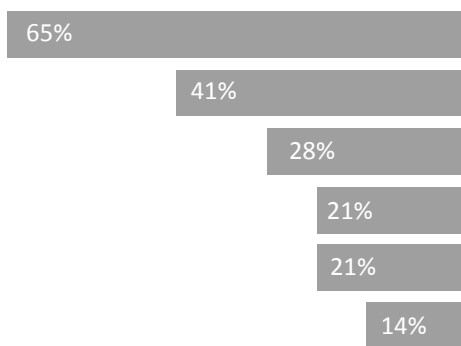
运输方式的选择往往与货物运输的距离有关。汽车行业总运输距离及长途运输的比例均较大，往往表明汽车行业专注于为数不多但规模较大的生产基地，而其他行业则选择使用较多的供应商，分部较为分散，因此更接近终端用户。

Distances Required for Delivery 按货物运输距离

- Intracity 市内 ■
- < 200 km 小于2百千米 ■
- 200 – 500 km 2百到5百千米 ■
- > 500 km 大于5百千米 ■



Distribution Strategies in the Coming Two Years 未来两年的分销策略



Better performance (cost, speed, quality) in existing network
在现有网络中寻求更好的绩效（成本，速度，质量的改进）

Nationwide network 全国覆盖式网络

Expanding beyond Tier II and Tier III cities 向二三级城市外扩张

Bypassing wholesalers and distributors—going direct to retail points
绕过批发商和分销商直接面向零售终端

Reducing the number of contractors (such as 3PLs) 减少承包商（如第三方物流）

Other 其他

STRATEGIES & PERCEPTIONS 战略和思路

To get a sense of where China's logistics industry is headed, it's important to understand what industry players think about their current situation, and what they plan to do about it in the future.

When asked about their China expansion strategies in the next two years, our respondents leaned strongly towards the development of a nationwide network (41%) - see "Distribution Strategies" chart on page 6. Only 28% indicated a desire to 'expand beyond tier two and tier three cities,' indicating that companies represented feel they can achieve sufficient nationwide coverage without having a presence in every single town. The desire to develop a nationwide network was no more or less popular with the supply chain/logistics directors and managers than it was with our respondents overall, but these directors/managers who also manage a smaller total warehouse footprint in China were more likely to choose 'nationwide network'.

Nearly two thirds of all the individuals responding indicate that they seek better performance in their existing network, but only 21% of total respondents selected 'reducing the number of contractors' or 'bypassing wholesalers and distributors' as strategic goals. We may assume then that while our respondents are aiming at improved performance, 3PLs, wholesalers and distributors can breathe easy—their services are still viewed as necessary.

虽然熟悉物流行业现今的操作方式很重要，但是了解决策人对目前趋势的判断，以及对未来的构想和计划则显得更加重要。

每当受访者被问起其在中国未来两年内的发展计划时，有很大一部分人（40%）有强烈地倾向于逐步在全国范围都建立网点，只有一小部分（28%）希望可以拓展到邻近的2-3线城市，这表明他们认为可以建立完善的网络覆盖但不需要在每个城镇都设立站点。供应链和物流总监跟经理并不比其它受访者更希望在全国范围内建立网点，不过这些供应链和物流总监跟经理当中管理的仓库面积较小者，却更愿意选择这种全面覆盖的模式。

近三分之二的受访者表示他们一直在寻找一种更高效的方式来运用现有的物流网络，但只有22%的受访者选择用“精简承包商”或者“绕过分销商和批发商”为战略目标，此外，供应链和物流管理者的思路与所有受访者并无太大差别。因此，在我们的受访者都在费尽心机提高业绩表现的时候，第三方物流，分销商和批发商大可喘一口气了—他们的地位不会受到威胁。





Desired Locations for Warehousing/DC 理想仓储地/配送中心的选择:

We've long known that Shanghai is a focal point for such facilities. A full two thirds of the respondents say that they use or plan to use warehousing or DC facilities in Shanghai, and another 21% indicate nearby Suzhou (no doubt in part because of the geographical location of the Council's mainland China office). Beijing and Guangzhou were chosen by 35% each, while Tianjin and Shenzhen were chosen by 27% and 23%, respectively. One interesting result: as many people said Chengdu (23%) as they did Shenzhen, another indication of Chengdu's growth as a regional center rivaling Chongqing, which was chosen by only 10%.

'Space utilization,' 'lack of scalability/flexibility' and 'waste management and environment' are seen as key weaknesses in facilities in China. 'Security and safety,' 'area for truck movement,' 'number of loading doors' and 'clear height of the building' are seen as relatively less weak. Since 'safety and security' ranked higher than even 'price', and second only to 'service quality', in our question about what decision-makers value most in selecting a 3PL, it seems that, while safety and security is of high importance, our respondents don't see a major issue with it in the current environment—a surprise to us given the horror stories we often hear about the safety/security risks in the environment.

理想仓储地/配送中心的选择: 我们都知道上海是具备完善仓储设施的选择热点。大概有三分之二的受访者表示他们愿意并计划将仓库及配送中心设在上海, 另有21%选择附近的苏州(也许是因为这里是全球供应链理事会中国总部的原因)。北京和广州分别有35%, 还有27%选择天津, 23%选择深圳。一个很有趣的结论在于, 选择成都的和深圳的人差不多都有23%, 显示成都正快速成区域性的中心, 而相鄰的競爭對手重庆却只有10%受访者青睐。

“空间利用率低下”, “缺乏扩展性和灵活性”, 和“环保与废弃物管理”被视为中国供应链发展环境的主要弱点所在。“安全与保障”, “可陆运区域”, “可装卸门点”, 和“建筑净高”则相对来说较不是问题。问卷的结果显示, 当我们问到决策者在选择第三方物流时最在意的考虑因素时, 安全与保障排名第二, 仅次于服务质量, 其重要性甚至高于价格。不过虽然安全与保障被认为极为重要, 我们的受访者似乎不认为在当前的环境下这是一个很大的问题—这个结果的确让我们意外, 因为我们还是常听到关于安全风险事故。

Top 5 Warehouse Locations

Shanghai
Nearby Suzhou
Beijing
Guangzhou
Shenzhen

Satisfaction with Existing Service Providers 对现有服务供应商合作的满意度:

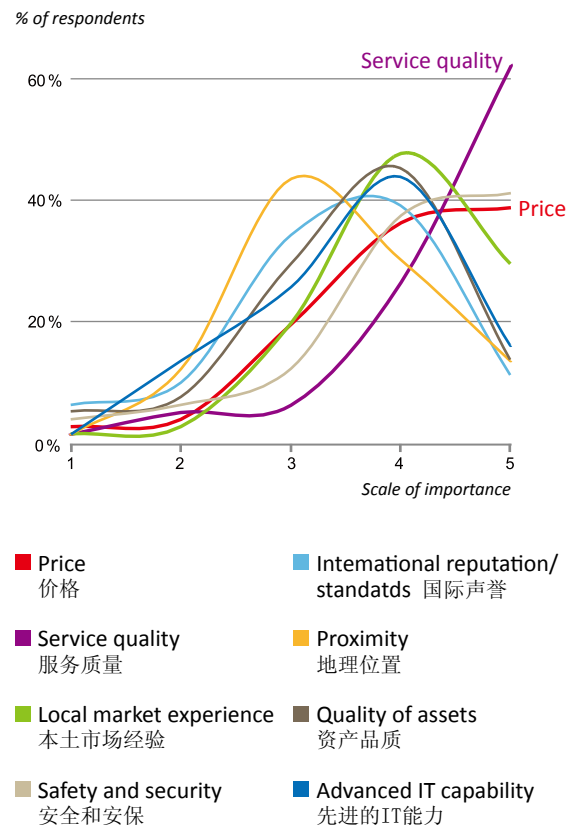
Three fourths of our respondents say that they are at least satisfied with their current 3PL. Particularly interesting: one in three of those dissatisfied manage less than 5,000 square meters of warehouse space, compared with one in five of those managing 5,000 square meters of warehouse space or more. And only four of the supply chain/logistics directors/managers report dissatisfaction. Professional focus and responsibility seems to drive ability to select and manage 3PLs successfully—dedicated directors and managers in the supply chain/logistics field, or those responsible for large warehouse footprints, seem less likely to face issues.

What's more, two thirds of those who are dissatisfied say that 'service quality and professionalism' is the cause of their dissatisfaction, with 'price' and 'inability to adapt' far behind (about 40%) as reasons for dissatisfaction. 'Price' wasn't even a clear second choice. One explanation is that customers negotiate for low-end prices but then expect high-end services, but the dramatic gap our survey reveals is consistent with developments in the service sector economy overall: service providers who remain focused on price are lagging market expectations—and market opportunity. Moreover, 100% of those who report dissatisfaction and manage a larger warehouse footprint indicate that service quality is the primary cause of dissatisfaction, and all of the dissatisfied supply chain/logistics directors and managers indicate service quality as a primary reason.

差不多有四分之三的受访者对目前合作的第三方物流比较满意。有趣的是，那些管理仓库面积在5000平方米以下的管理者只有三分之一对供应商的服务不满，而管理仓库面积在5000平方米以上的管理者只有五分之一对供应商服务不满。而只有4%的供应链和物流管理者表示对现时的服务不满。专业和负责的态度似乎是成功选择和管理第三方物流的驱动力。专责管理供应链与物流领域的管理者和经理人，以及负责大型仓库的领导者，往往不会遇到类似的问题。

更重要的是，有三分之二对供应商服务不满的受访者表示服务质量和专业度是导致不满的主要原因，而价格和无法适应变化等因素则仅为35%和43%。当然有一种合理的解释是，客户总是在追求低价却高质量的服务，而这两类不满原因间的巨大差距基本与服务经济体的整体发展是一致的：只专注于价格的服务供应商无法跟上市场预期及机会，“价格”甚至不一定是用户第二重要的选择条件。此外，100%表示对供应商不满的大型仓库管理者和供应链经理都认为服务质量是不满的主要因素。

Criteria Used to Choose a Logistics Service Provider



SUMMARY 总结

Two findings stand out from among many other interesting ones:

- Service quality, compared to price, is substantially more important among decision-makers;
- The industry may well have achieved a level of efficiency, and therefore value such efficiency, much higher than commonly believed.

These findings are yet another indication that the China-specific logistics sector is globalizing, and therefore expecting increasingly global standards of service quality and efficiency. We believe that 3PLs and other service providers therefore have a window of opportunity to shift their focus to such quality and efficiency, and not just attempt to compete on price. We also infer from the results that service providers who are willing to perform at global standards need not fear that they'll be marginalized. On the contrary, decision-makers indicate that their expansion plans do not include bringing logistics in-house or cutting back on the number of suppliers they use. Bottom-line: service providers who are able to offer global standards of performance have a bright future in China.



在诸多有趣的调查结果中，我们发现其中有有两个典型的特征值得我们关注

- 服务质量和价格相比，对决策者的影响力逐步增强
- 物流行业已经普遍达到一定的效率水平，并因此更加关注效率的提高，并且重视程度超过大众的预想。

这些结果都从某种程度上表明，有中国特色的物流行业已逐步加入全球化进程，并逐步达到世界标准的服务质量和效率水准，我们坚信第三方物流和其他服务供应商将因此有了绝好的机会从价格导向型竞争转向服务质量导向型竞争。提供高质量服务的供应商尤其不用担心自己会被边缘化。相反的，企业决策者们表示他们的发展计划并不包括将外包的物流服务收回企业内部或者减少他们合作的供应商的数量。总之：能在中国提供高质量服务的供应商将前途一片光明。

Research team: 研究小组

Max Henry, Founder and Executive Director,
Global Supply Chain Council

With 20 years of Asia working experience, Max has worked in trade publishing, sourcing, procurement, IT and logistics for the past 12 years. For the past 5 years, Max is the executive director of the Global Supply Chain Council, Asia's leading professional organization.

John D. Van Fleet, Director, Marketing Solutions,
Global Supply Chain Council

Based in Shanghai, Van Fleet has worked in the B2B sector in Asia since the early 1990s. In addition to his role with the Council, Van Fleet serves as advisor and adjunct faculty for the Antai College of Economics and Management, Shanghai Jiao Tong University.

Russel Beron, Managing Editor, CHaINA
Magazine

Also based in Shanghai, Beron has written about the supply chain sector for a variety of publications prior to managing CHaINA Magazine. CHaINA is a leading supply chain focused publication covering China and the Asian region.

马克思亨利，创始人和执行董事，供应链理事会
马克思先生拥有20年在亚洲工作的经验。在过去的12年里，他致力于贸易出版、采购、IT和物流等行业。5年前他创办了亚洲领先的专业组织 Global Supply Chain Council。

约翰范佛里特，营销方案总监，供应链理事会
常驻上海，约翰范佛里特先生从90年代初起 在亚洲地区从事B2B的管理。他除了在理事会任职，还担任上海交通大学，安泰经济管理学院资深顾问并兼任讲师？。

罗素贝龙，CHaINA杂志，总编
常驻上海，贝龙在执掌CHaINA杂志前就在多种供应链管理相关刊物发表过论文。CHaINA杂志是中国及亚太地区供应链领域的重点出版刊物，深深影响着供应链的决策者们。

FM Logistic

3 West Guangzhou Road, Taicang EDZ, Jiangsu Province
Tel: +86 (512) 8889 8666
Fax: +86 (512) 8889 8604
www.fmlogistic.com

Global Supply Chain Council

Unit A, 10F, Block 2, 543 Xin Hua Rd., Shanghai
Tel: +86 (21)
Fax: +86 (21) 6091 1054
Email: info@supplychains.com
www.supplychains.com



FM LOGISTIC is a leading European based logistics company providing a high standard of warehousing, distribution and transport services in high growth markets such as Central and Eastern Europe, through the company's own network. With a long term commitment to China, since 2004 FM has been investing in a domestic logistics network to support the needs of major multinational fast moving consumer goods companies. This network already includes three large high grade warehousing platforms and a regional transport hub network.

弗玛物流是欧洲一家领先的物流公司。在诸如中欧和东欧，此类高增长市场中通过自己的网络来提供高标准的仓储，配送和运输服务。由于对中国长期的承诺，自2004年以来弗玛物流一直处于国内物流网络的投资，以支持主要的跨国快速消费品公司的需要。这一网络已经包括了三个大型高档仓储平台和区域交通枢纽网络。



The Global Supply Chain Council is an industry association headquartered in China, with the mission of driving supply chain excellence through information, events and benchmarking of best practices across industries. The Council publishes both CHaINA Magazine and a Vendors' Directory and reaches a community of over 65,000 supply chain professionals in China, India and Vietnam.

The Global Supply Chain Council是一个行业协会，总部设在中国，以引领供应链发展方向为使命，提供相关信息，事件报道，跨行业实践经验与操作标准。理事会出版CHaINA杂志和供应商目录，范围已涵盖到中国，印度和越南65000家供应商。