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Global Express Parcels 2018 - Market Report

Global Express & Small Parcels 2018

The global express and small parcels market continues to be disrupted by e-commerce with new demands from consumers shifting the operations of all the major express providers. Find out how this trend will develop according to our team of experts, supported by our in-house market sizing including for the first time 5-year CAGR and 2018 full year estimates. The Global Express & Small Parcels report also looks in-depth at the pharma and healthcare sectors, including clinical trials and direct-to-patient services.

Inside the report:

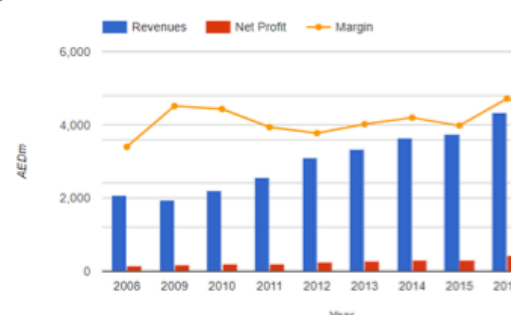
- Market sizing for the global express and small parcels market
- Profiles of the major express providers and a comparative analysis of 2017 performance
- Analysis of express opportunities in the healthcare and pharmaceuticals sector
- Profiles of major shippers changing the express sector – Alibaba, JD.com and Amazon

A sneak preview

Aramex

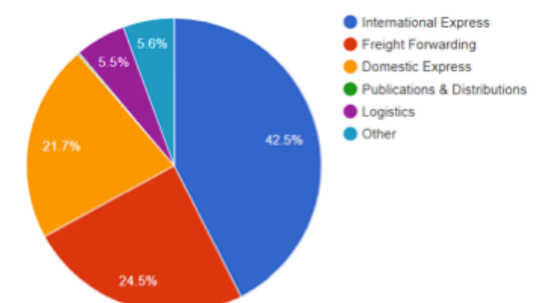
Aramex is a United Arab Emirates-based public joint stock company that is primarily engaged in domestic and international express, though it also has a significant presence in other logistics sectors, particularly freight forwarding. It operates in over 567 offices across 69 countries with over 18,000 employees.

In 2017, Aramex reported revenues of AED4.7bn, up 8.7% year-on-year.



Its most important business segment is international express (42.5% of revenues), followed by freight forwarding (24.5%), then domestic express (21.7%). Other logistics-related activities comprise much of its remaining revenue. In 2017, its International Express business grew by an impressive 19% to AED 2.0bn on the back of the strong growth in cross-border e-commerce. Across all

of its segments, e-commerce is becoming increasingly important, with cross-border e-commerce accounting for 25% of its annual revenues and growing at 30% annually.

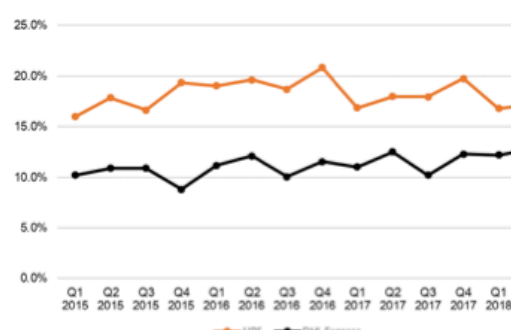


By geography, the Middle East accounts for 60.1% of revenues, followed by Asia & others (24.9%), Europe (12.2%) and North America (2.9%).

EBIT margin comparison

As with its volume growth, DHL Express' EBIT margin has been remarkably stable since 2015, hovering around the mark of 11%. UPS' margin on the other hand has been more volatile, but almost always higher than that of DHL. UPS' margin was especially strong from Q4 2015 to Q4 2016, when it was consistently around the mark of 20%. It then crashed in Q1 2017 to 16.9% and never fully recovered, with Q2 2018 registering figures at 17.2%.

Chart 5.2 International Express Provider EBIT Margins



Note: DHL Express' margin is for the whole division, which includes both domestic and international activities. Its premium international express product, time definite international, accounted for 78% of divisional revenues.

UPS' margin is for its 'International' division, which includes domestic revenues generated outside the United States. Around 75% of its revenues are generated from international express export shipments.

FedEx data can't be used as a comparison because it only reports operating profit for its Express division, and international export packages only account for around 40% of revenues, with various other domestic services accounting for the remaining 60%.

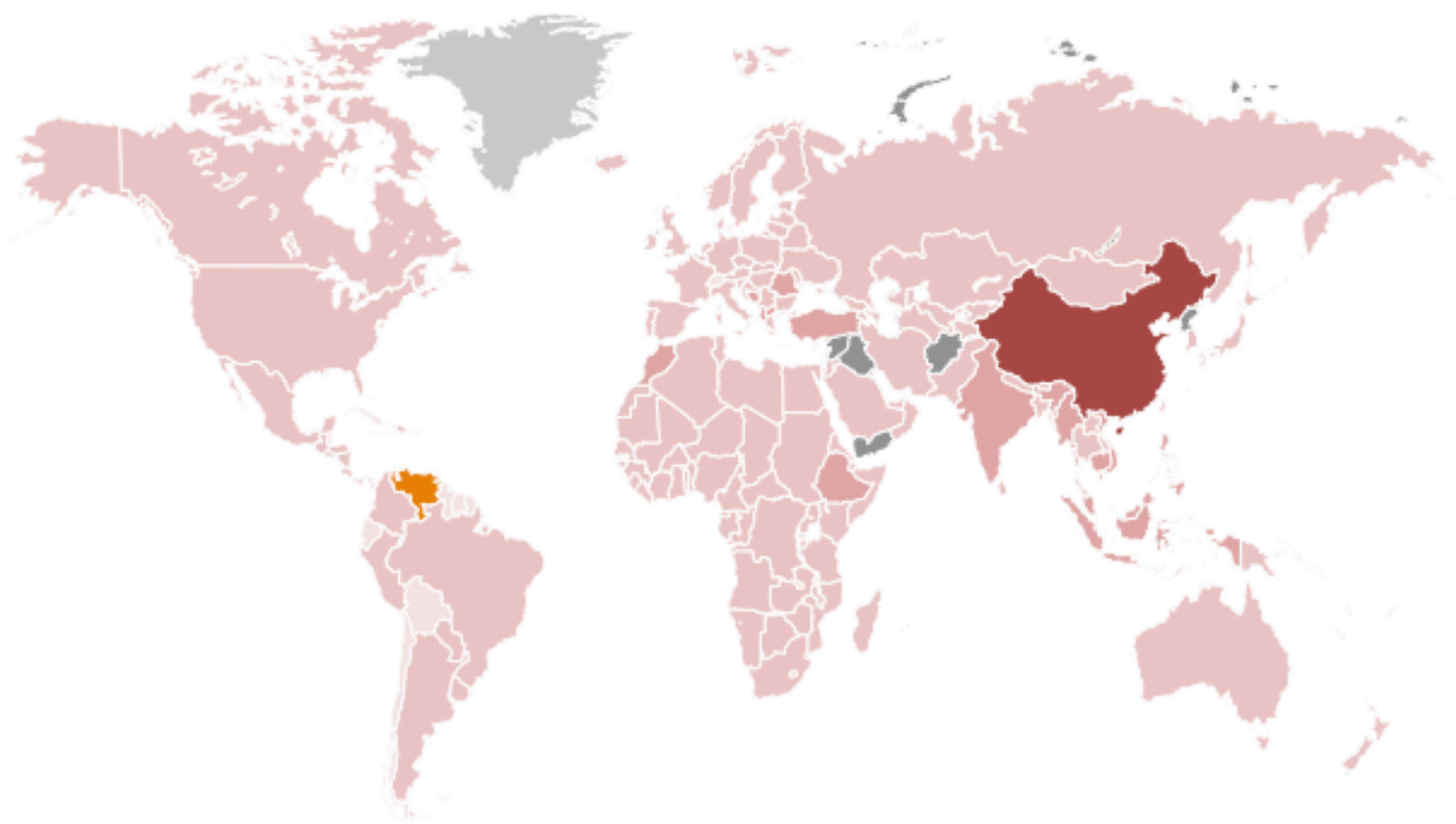
Volume growth comparison

An examination of international express provider volume growth since 2015 reveals that DHL Express' growth has been both strong and stable, averaging 8.7% over the period. UPS' growth path follows a similar overall trajectory to DHL Express, suggesting the two businesses are exposed to similar economic dynamics, however DHL growth is always several percentage points higher than UPS' every quarter. FedEx growth path follows a similar trajectory to DHL and UPS up until Q2 2016, after which volumes spiked mainly due to the integration of TNT Express. Since Q3 2017, FedEx' year-on-year volume growth matches that of DHL Express.

“Over the last several years, a trend for quicker growth in domestic express and small parcel markets when compared with international markets has emerged. Over 2017 this trend started to reverse, with notably strong international market growth in Asia Pacific and North America, as well as in Europe where the international market grew at a faster rate than domestic for the first time since 2010.”

Have a question? Contact Michael Clover mclover@ti-insight.com or call +44 (0)1666 519907 for more information.

Global Express & Small Parcels Market Growth Map



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- Investors
 - All C-level executives
 - Supply chain analysts

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