

# Competitive Analysis of the Logistics Industry in the Context of Cross-Border E-Commerce

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**Abstract:** This paper describes the current situation of China's cross-border e-commerce logistics industry, mainly using the literature research method, SWOT analysis found that the problems of China's cross-border logistics industry are: the lack of professional cross-border e-commerce logistics personnel, cross-border e-commerce logistics information technology level is not high, the logistics infrastructure is not perfect, the lack of third-party logistics to provide specialized services, and the high cost of logistics. Threats faced in the development are: global turbulence and big reshuffle, deepening trade barriers, different status of logistics and distribution in different countries, mismatch between the speed of logistics development and demand, and complicated return and exchange of goods. According to the SWOT matrix of cross-border logistics industry, it summarizes the shortcomings of cross-border logistics development and puts forward suggestions and future development prospects.

**Keywords:** Cross-Border E-Commerce; Cross-Border Logistics; Competitive Analysis; SWOT Analysis

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## 1.Introduce

In recent years, many large e-commerce enterprises have grown rapidly, the scale of e-commerce transactions has been expanding, and traditional e-commerce companies have also carried out cross-border business. As a new form of foreign trade, cross-border e-commerce is developing rapidly. And cross-border e-commerce requires the participation of logistics in addition to transactions between the two parties. The current situation of logistics also affects the further development of cross-border e-commerce. Therefore, in the context of global economic integration, it is particularly important to vigorously develop cross-border logistics.

## 2.Status of China's cross-border e-commerce logistics industry

### 2.1 Numerous cross-border e-commerce platforms

By comparing the number of cross-border e-commerce platforms, there were 441 new cross-border e-commerce enterprises registered in China in 2012, the number of new cross-border e-commerce enterprises reached 1,134 in 2014, and there were 2,136 new cross-border e-commerce enterprises in 2015, which is an 88.4% increase compared to the previous year. Between 2015 and 2018, the number of new business registrations stayed right around 2,300 each year. In 2019, the number of new cross-border e-commerce enterprises for the whole year was 3,191, a year-on-year increase of 30.1%, which is 7.2 times of the data from eight years ago. In 2020, in the first half of the year alone, the number of new cross-border e-commerce

enterprises reached 2,356, which is almost as high as the number of registrations in the whole year of 2015-2018, which is a significant improvement from the supply end, it promotes the growth of cross-border e-commerce industry and boosts the demand of China's cross-border logistics industry.

## 2.2 Broad market for cross-border e-commerce

China's annual import and export of goods totaled 321,557 billion yuan in 2020, up 1.9% compared with 31,562.8 billion yuan in 2019, and up 32.1% compared with 2,433.86 billion yuan in 2016. Among them, total exports of goods amounted to 179,326.6 billion yuan, up 4.0% compared with 172,374.4 billion yuan in 2019, and up 29.6% compared with 1,384.9 billion yuan. With the vast number of cross-border e-commerce users in China, the data on China's import and export volume in 2020 is still very optimistic despite the global environment of the epidemic, economic setbacks and declining trade.

According to the data on the total import and export of goods in 2020, China's exports to the United States, the main exporting country, amounted to 3,127.9 billion yuan, accounting for 17.4% of the total exports, an increase of 8.4% over the previous year; exports to the European Union amounted to 2,708.4 billion yuan, accounting for 15.1%, an increase of 7.2% over the previous year; exports to ASEAN amounted to 2,655.0 billion yuan, accounting for 14.8%, an increase of 7%. Overall, the amount of China's exports of goods to major countries are on an upward trend. It can be seen that under the epidemic, China's export products are still recognized by the world, and the market for cross-border e-commerce in China is very open. Under the 2020 New Crown epidemic, China's foreign exports have not decreased, but have been increasing. Due to the epidemic, the opportunity for face-to-face communication has been reduced, promoting the shift to online consumption, and cross-border e-commerce, a form of foreign trade, is very suitable for the resumption of work and production under the epidemic, further expanding the market size of cross-border e-commerce.

## 2.3 Dramatic increase in cross-border courier business

In 2014, China's express delivery business volume was only 13.96 billion pieces, and the national postal industry completed business income of 1.1 trillion yuan in 2020, of which the volume of express delivery business reached 83 billion pieces, compared with 63.52 billion yuan in 2019, an increase of 30.8%, an increase of 4.9 times compared with 2014; the business income in 2014 reached 204.54 billion yuan, and in 2020 the business income will reach 875 billion yuan, compared with 749.780 billion yuan in 2019, an increase of 16.7%, an increase of 3.3 times over 2014. With the accelerating process of urbanization, the development of the express delivery industry is also improving year by year, and in 2020, the volume of express delivery business and total revenue increased significantly compared with previous years, showing a stable development trend. The rise of e-commerce and the transformation of business models help the logistics industry to move forward, and it is expected that the business volume of the express industry will still maintain a growth rate of about 20% in the future cross-border express business.

## 2.4 Cross-border e-commerce logistics market grows in size

At present, China's third-party trading platform is gradually improving, the number of users is increasing, and more and more e-commerce enterprises are entering the field of cross-border e-commerce, which also makes the cross-border e-commerce platform transaction volume increasing, further stimulating the scale of the cross-border logistics industry, and also promotes the development of international trade and the international logistics industry<sup>[1]</sup>. In 2015, the market scale of the cross-border e-commerce logistics industry only reached 1.08 trillion yuan, by 2019, the market size of the logistics industry reached 2.1 trillion yuan, an increase of 16.7% compared with 2018, and the market size in 2019 is almost twice as much as in 2015. The scale of China's cross-border e-commerce logistics industry is growing at a high rate, and the future development space of cross-border logistics is very broad.

## 2.5 Cross-border logistics leads the world in export demand

With excellent craftsmanship and low labor costs, the Chinese are always able to produce goods that are good value for money, attracting many foreign customers. Stable quality of goods makes the production supply chain extra stable, which also makes China's cross-border e-commerce export logistics demand higher than that of other countries, and occupies a dominant position globally. In 2011, the number of China's express delivery pieces 130 million pieces, in 2013 it was at a growth rate of 46% to reach 270 million pieces, reached 1.44 billion pieces in 2019, and reached 1.09 billion pieces in the first eight months

of 2020 alone. From 2011 to 2020, the total number of express shipments in China has continued to grow at an average growth rate of about 30%, laying the foundation for the development of China's cross-border logistics. Of the total cross-border e-commerce parcels in the world from August 2019 to July 2020, the U.S. issued parcels accounted for 13.7%, the UK, Germany, the Netherlands, Singapore and other countries issued parcels accounted for an average of about 2%, while the parcels issued by China accounted for 60% of the total global parcels, which is much higher than other countries. Most of the parcels sent from China were sent to the United States, the United Kingdom and France.

## 2.6 Diversification of cross-border logistics models

The continuous increase in cross-border logistics demand has stimulated many logistics companies to set up logistics points overseas, through contacting local residents for cooperation, or re-establishing their own outlets, using different forms to develop the market, improve the structure of overseas outlets, and provide more cross-border logistics services. China's Yunda, China Express, Yuantong, Shentong, SF and other courier companies have adopted such a model. In addition, some e-commerce platforms have also launched integrated logistics services, such as Dunhuang online "online delivery" dedicated logistics services for foreign trade merchants to provide express services, covering 107 countries and regions around the world. PayPal in the postal service, courier, overseas warehousing with a number of internationally renowned service providers, the launch of 14 overseas Dedicated logistics solutions for five European countries, Canada, Australia, Japan, Brazil, Russia, Spain, South Korea, the Middle East major countries, to provide cross-border logistics services for Chinese users<sup>[2]</sup>. As cross-border logistics users come from different countries, customers' needs vary, and the products traded are very different, making the logistics mode gradually diversified. Cross-border e-commerce logistics modes are various: overseas warehouse mode, third-party logistics mode, logistics alliance mode, etc., all of which promote the diversified development of cross-border logistics. Together with the continuous innovation of science and technology, the cross-border logistics mode will gradually transform and develop in the direction of more technological, more intelligent and more diversified<sup>[3]</sup>.

## 3. SWOT analysis of cross-border e-commerce logistics industry

### 3.1 Development strengths

Consumption demand drives the development of cross-border logistics. In 2016, the national per capita income was 23,821 yuan, and the per capita disposable income in 2020 reached 1.35 times of that of four years ago, and the per capita disposable income of the residents has been growing year by year at a high rate. National income increases, per capita disposable income is also gradually increasing, people's living standards gradually improve, people's demand for goods also began to increase, people are more willing to use their income to buy some more improve the quality of life of the goods, therefore, the demand for consumption pull cross-border e-commerce development, and further in the demand side of the demand side of the cross-border logistics to promote the further development of cross-border logistics.

Cross-border e-commerce drives cross-border logistics growth. The 2020 Annual China Cross-border E-commerce Market Data Report shows that in 2015, the size of the export cross-border e-commerce industry was 4,500 billion yuan, and in 2016 it reached 5,500 billion yuan at a growth rate of 2.22%, and in 2020 the size of the cross-border e-commerce industry reached 9,700 billion yuan, a figure that is 2.16 times higher than that of five years ago, and 8,030 billion yuan higher than that of 2019. A year-on-year increase of 20.79%. The industry transaction scale of cross-border e-commerce is so large that it further drives the growth of cross-border logistics from the supply side.

The China-European liner train improves logistics efficiency. Cross-border e-commerce, as one of the sub-industries of e-commerce, creates opportunities for the development of existing cross-border e-commerce under the existing e-commerce policy. On the one hand, the government policy strengthens the guidance of cross-border retailing and promotes the opening of more cross-border e-commerce pilot cities; on the other hand, with the gradual deepening of the "One Belt, One Road" policy, more and more cities in China have opened "China-European liner trains" one after another, and these "China-European liner trains" have become more and more important for cross-border e-commerce. The opening of "China-European liner" promotes the construction of cross-border logistics, provides conditions for cross-border transportation, and effectively improves the efficiency of cross-border logistics.

Cross-border logistics is lucrative. From the gross profit margin performance of each business of China Trade Logistics, it can

be seen that the gross profit margin of the new business cross-border e-commerce logistics is 19%, significantly higher than the gross profit margin of 12% for air transportation and 8% for sea transportation. Meanwhile, the cross-border e-commerce logistics business is in a period of high growth in the business structure of the entire company, with an annualized growth of 75%, compared with the full year of 2019, and the proportion of cross-border e-commerce logistics revenue in the first half of 2020 increased from 2% to 14%.

### 3.2 Development weaknesses

Lack of specialized cross-border e-commerce logistics talents. Cross-border e-commerce belongs to a new type of transaction mode, cross-border logistics also needs advanced technology as a support, cross-border logistics practitioners need to have international trade, marketing, e-commerce, logistics and supply chain and other aspects of knowledge of composite talents<sup>[4]</sup>. According to incomplete statistics, there are only seven schools in China that offer cross-border e-commerce, and the annual output of cross-border logistics talents is even less, while China's cross-border e-commerce and cross-border logistics are developing rapidly, and the output of cross-border logistics talents is far from being able to meet the market demand. And the future of cross-border logistics will be more complex, the technical requirements of the logistics industry will be higher, and cross-border logistics will be more stringent on the demand for talents<sup>[5]</sup>.

The level of cross-border e-commerce logistics informatization is not high. The market economy is constantly advancing, the development of cross-border logistics needs the support of e-commerce, and the technical requirements in the development of e-commerce are crucial to its impact. The development of cross-border e-commerce logistics requires modern technical systems to provide information support, in the process of logistics and transportation, order entry, cargo tracking, logistics updates and other information can not be presented in a timely manner with the network, the level of informatization in cross-border logistics is yet to be improved, which leads to problems in the distribution of commodities in the distribution process, which affects the efficiency of the transaction of cross-border logistics, and also inhibits the development of cross-border logistics.

Poor timeliness of logistics in China. At present, the overall logistics distribution speed in China needs to be improved. According to the survey of cross-border logistics timeliness situation found that the parcels that can arrive on the same day only accounted for 1%, 13% of the parcels can arrive in 2-3 days, while most of the goods generally reach the time of 10 days or more, and the arrival time of 30 days or more accounted for 11%. It can be seen that, in the context of the rapid development of cross-border exports, the existing logistics and distribution time is poor, distribution services are not good enough to meet the development of cross-border e-commerce.

Lack of third-party logistics to provide specialized services. Compared with the fast-growing demand for cross-border e-commerce, the development of the logistics industry is lacking, the number of third-party logistics that effectively reduces the transportation time is small, the platform network is not reasonable enough, the function is not perfect enough, and the connection between the third-party logistics enterprise and the customer and with the exporter is not close enough, which is difficult to satisfy the needs of the supply and demand sides, making the third-party's advantages fail to be brought into play.

High logistics cost. For cross-border export trade, the cost of logistics and transportation process, packaging and loss and other problems have been plagued by cross-border logistics enterprises, hindering their operational development, the logistics costs of the entire e-commerce industry are increasing, and cross-border e-commerce is also increasing<sup>[6]</sup>. Compared with the general e-commerce logistics transportation in China, cross-border e-commerce logistics has a longer distance in the process of transportation, not only to bear the logistics transportation within the country, but also to take into account the transportation of international logistics, and all these costs make the cross-border logistics cost higher than the general logistics.

### 3.3 Development opportunities

The popularization of the Internet stimulates consumption. With the gradual popularization of computer networks and the increase in Internet users, people's consumption patterns have changed, and the number of Internet shoppers is increasing. The Internet has greatly changed people's lifestyle and consumption habits. The convenience and speed of Internet shopping directly stimulates consumers' purchase desire and potential demand.

Epidemic pulls cross-border logistics transactions. China's economy is able to withstand risks and has strong adaptability. When foreign trade enterprises face epidemic and other irresistible factors, the economic system itself can make corresponding adjustments to adapt to changes in the external environment to ensure the stability of the national economy. When the state finds that the new crown epidemic may affect foreign trade, it will actively take measures to adjust the export credit and effectively regulate exports. The promotion of cross-border e-commerce requires cross-border support and cooperation from cross-border logistics enterprises. It is reported that cross-border logistics plays an important role in promoting the development of cross-border e-commerce <sup>[7]</sup>.

Consumption pattern transformation promotes the development of logistics. Due to the impact of the new crown epidemic, the movement of foreign trade personnel has become a problem, and face-to-face communication is difficult to realize. While the market for foreign trade exports is yet to be satisfied, people have shifted from offline communication to online live streaming with goods. Sales through live webcasting can save consumers' time, reduce transportation costs, and the view of samples crosses the boundaries of time and space. And live e-commerce has become an opportunity for the traditional industry to turn around. The market has formed a low-cost, high-efficiency industrial docking mode, and the explosive growth of domestic live e-commerce is expected to lead to the further development of cross-border live e-commerce, forming a source of support for the development of cross-border e-commerce logistics industry.

Policy support for cross-border logistics to provide protection. The state has adopted a series of supportive policies and subsidy programs to promote the development of cross-border e-commerce: Shenzhen provides bank loan subsidy support for overseas warehouse business; Guangzhou gives bonus support to cross-border e-commerce enterprise logistics; Hangzhou assists cross-border e-commerce development in six aspects such as warehousing and logistics construction; obliges subsidies for bonded imports of direct purchases of imports; and Ningbo Haikou all gives a certain degree of financial support to cross-border e-commerce enterprises. National policy to help cross-border e-commerce diversified development, the market system is also improving, cross-border e-commerce market gradually standardized, the structure is more reasonable and stable.

### **3.4 Development threatens**

Global turbulence reshuffle. Due to the epidemic, making some uncertainties appear, will indirectly affect the development of cross-border logistics in the economy. 2020 epidemic occurred, the economic turbulence of the countries, the level of inflation in our country has an impact on the development of cross-border logistics, which in turn affects the development of cross-border logistics. If this situation continues, it is not conducive to China's export trade, the competitiveness of U.S. goods exports increased, the volume of China's exports decreased imports increased, the trade surplus between China and the United States decreased, and China's small and medium-sized enterprises will face an existential crisis <sup>[8]</sup>. The export of China's cross-border e-commerce enterprises is restricted, and the development of cross-border logistics is hindered.

Trade barriers. When the U.S. begins to erect trade barriers against China, it will increase the import tax on Chinese goods, the difficulty of customs clearance and procedures increase, the timeliness of the goods decreases, the customer waiting time is extended, the experience is reduced, and the operating cost of cross-border e-commerce is increased, and the huge cost burden impacts on the cross-border e-commerce enterprises in China. Trade barriers in the impact of China's cross-border e-commerce industry, the cost of cross-border logistics further increased, cross-border logistics of goods trading volume is affected, the development of cross-border logistics will therefore be hindered.

The status quo of logistics and distribution varies from country to country. Different regions, different geographic environments, there are some differences in the actual state of development of local logistics, different levels of logistics development, consumer demand for distribution is also different, the geographical logistics infrastructure is also different. And because of this, the differentiation of logistics and distribution in different countries also adds to the difficulty of cross-border logistics development.

Mismatch between the speed of logistics development and demand. The scale growth of cross-border logistics is far from catching up with the growth rate of cross-border e-commerce. In the peak season of sales like Christmas, China's cross-border e-commerce exports will increase dramatically, and to face so much import and export transportation of goods, relying solely on international logistics companies is far from enough, there will often be a backlog of express mail, burst warehouses



and other phenomena, which will make the logistics of the time limit is further extended, and the corresponding cost of transportation will also increase, which has brought a huge obstacle to the development of cross-border e-commerce.

Returns and exchanges are complicated. The process of cross-border e-commerce transportation is more complex, mailing a commodity, from the merchant to reach the hands of consumers need to go through a number of processes. The exporting country merchants after receiving the order, through inland transportation to reach the country's distribution center, how to unify sent to the customs supervision area, where after the audit for the export distribution loading, and then for customs clearance procedures to reach the export port, after shipping to the importing country, in the importing country is also in the customs supervision area for audit, after the end of the audit for clearance, and then import distribution, after transportation to reach the Distribution center, the mailer for delivery, after reaching the hands of consumers. This is a complex and long process.

#### **4.Recommendations**

Integrate supply chain resources and optimize costs. As mentioned above, cross-border e-commerce costs, logistics accounted for 20% to 30%, accounting for a larger share, the high cost of logistics directly leads to the high cost of cross-border trade, and at present, reducing cross-border logistics costs is the most important thing. In the process of logistics and transportation, cross-border logistics and cross-border e-commerce enterprises in-depth integration, integration of all resources in the supply chain, contacting upstream and downstream enterprises to form a scale effect, and effectively save costs.

Create a smart informationized cross-border e-commerce logistics platform. Within a reasonable range of cost, adopt advanced Internet of Things technology, establish a refined and standardized data sharing system, and share the data in real time, so that both sides of the transaction are more convenient and safe. The improvement of consumption level makes people pursue more individual satisfaction, and the cross-border logistics platform should satisfy the personalized needs of exporters and customers as much as possible, improve the quality of logistics services, and make the platform develop in the direction of verticalization, intelligence, and compactness.

Strengthen the construction of cross-border e-commerce logistics professional talent team. Universities and colleges should be committed to cultivating logistics talents to meet the market demand, and enterprises should also provide in-depth training for logistics employees so that they can understand the current situation of cross-border logistics and be able to solve all kinds of emergencies that occur in cross-border logistics. The government should also clarify the cross-border logistics support policies, enterprises to improve the management system of cross-border logistics personnel, to cultivate more composite talents with excellent quality, to form a strong cross-border talent team. Logistics personnel should also strengthen their own requirements, and strive to learn cross-border logistics-related knowledge, to contribute to the internationalization of cross-border logistics development.

Vigorously develop specialized third-party logistics. The supply chain system in cross-border e-commerce trade is incomplete, and in the huge logistics network system, it is necessary to vigorously develop specialized third-party logistics, actively study the problems arising from third-party logistics, explore the improvement methods and enhancement strategies, build a modern management system, stimulate the potential of the logistics industry, closely connect the customer and the exporter, give full play to the third-party bonding function, improve the utilization rate of each link in logistics, effectively reduce the Costs, so that the existence of third-party logistics really simplify the transaction process and improve transaction efficiency.

Integration of logistics enterprises to become bigger and stronger. The integration of resources of major logistics enterprises, so that enterprises with different advantages to join forces, the use of scale effects, reduce costs to reduce costs, making cross-border logistics to the direction of intensification, scale development. By integrating manufacturing, e-commerce and other fields together, modern logistics enterprises with strong competitiveness, outstanding business capacity and high transportation efficiency are formed, transforming into a diversified, modernized and networked logistics service industry.

Continuously improve cross-border logistics business functions and service level. The logistics industry targets different customer groups with different service requirements. For ordinary mail, customers generally require economic, more appropriate in price; for international air settlement business, users generally care more about time, need to get more high-end

services; and international freight storage and distribution, customers pay more attention to flexibility, innovation. Users of cross-border logistics requirements are increasing day by day, in order to meet customer demand, the logistics industry should be followed from the development of innovative development to change, and constantly improve the level of service and business capacity, and take the initiative to adapt to the market demand at multiple levels.

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