



# ***Media Kit***

November 2012

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## Welcome

Thank you for your interest in our Media Kit.

The purpose of this document is to provide you with background information on the Canadian Courier & Logistics Association, our members and the industry in general.

I trust that you will find it very useful in furthering your understanding of this fast-paced, growing sector of the Logistics industry, and the role our organization plays within it.

Just visit our web site at [www.canadiancourier.org](http://www.canadiancourier.org) and go to the Media Room area of the site. All the instructions you will require may be found there.

If you have any questions please feel free to contact us at the coordinates below:

**President & CEO** – David Turnbull

CCLA Office: 416-696-9995

Email: [dturnbull@canadiancourier.org](mailto:dturnbull@canadiancourier.org)

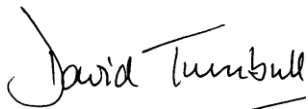
**Manager, Administration & Membership Services** – Frances Reid

CCLA Office: 416-696-9995

Email: [freid@canadiancourier.org](mailto:freid@canadiancourier.org)

Or at [info@canadiancourier.org](mailto:info@canadiancourier.org)

Yours truly,

A handwritten signature in black ink that reads "David Turnbull". The signature is written in a cursive style with a horizontal line under the name.

David Turnbull  
President & CEO

## **Organizational Mission/Structure**

The Canadian Courier & Logistics Association (CLA) is a non-profit organization, whose mission is to be a recognized leader in supporting the profitable growth of couriers and time sensitive delivery providers of all types and sizes across Canada by providing professional, informed and proactive representation and information on common issues.

The day-to-day operations of the Canadian Courier & Messenger Association are supported by a 2 person team that includes:

**President & CEO** – David Turnbull

CCLA Office: 416-696-9996

Email: [dturnbull@canadiancourier.org](mailto:dturnbull@canadiancourier.org)

**Manager, Administration & Membership Services** – Frances Reid

CCLA Office: 416-696-9995

Email: [freid@canadiancourier.org](mailto:freid@canadiancourier.org)

Additional resources are also utilized for lobbying and/or administrative support on an as required basis.

## **Press Contact Summary**

The person at the CCLA you should contact to obtain information and/or conduct interviews will depend on the topic you are interested in.

Below is the CCLA's primary press contact:

- David Turnbull – President & CEO: CCLA Mandate, Past Achievements, Current Lobbying Activities, Organizational Positions On Various Topics, Customs/Trade Issues

Additional information/statistics on the courier and logistics industry such as: Market Size/Structure, Key Market Trends can be sourced from:

[www.breiningerasociates.com](http://www.breiningerasociates.com)

Contact: Gary Breininger  
Breininger & Associates Inc.  
Tel. 905-915-4291  
Fax 905-915-4471  
Email: [gbreininger@breiningerasociates.com](mailto:gbreininger@breiningerasociates.com)



## **CCLA Membership Profile**

The Canadian Courier & Logistics Association (CCLA) represents courier companies in both the overnight or later and sameday/messenger segments of the industry, many of which offer logistics services. This is in contrast to other countries, such as the United States, where separate Associations exist for each segment individually. In this sense the CCLA is truly unique in its ability to provide a full 360 perspective of the industry when dealing with various regulators and legislators, and developing services and programs.

Our regular, or courier company members have combined annual sales of over \$5.5 billion, which in turn represents over 87% of the total value of the courier market.\* CCLA members also employ and/or use the services of over 46,800 Canadians, operate just under 24,000 vehicles, hundreds of aircraft, and maintain over 3,200 operational centers across the country. Based on this information, it is clear that CCLA members serve as a key component in many companies' overall supply chain management strategies, and therefore contribute significantly to the success and well being of the overall Canadian economy.

Embodying time sensitive delivery service company operations of all types and sizes across Canada; we provide professional, informed and proactive representation and information on common issues. Our members include large firms with global delivery networks, such as DHL, FedEx, Purolator, TNT and United Parcel Service, overnight trans-border integration firms, mid size local and regional delivery firms with strong area distribution networks and smaller local firms such as same day and messenger companies maintaining an extensive stake in the time sensitive shipping business.

The express transportation industry specializes in time-definite, cost effective, reliable transportation services for documents, packages and freight. Express delivery has vital importance to businesses utilizing time-sensitive, "just-in-time" manufacturing techniques and supply-chain logistics in order to remain internationally competitive. Collectively the industry acts as economic "catalysts" in facilitation of goods to market expediently - that translates to enhanced trade and industry prospects for the countries we service and hence a better way of life for all.

Worldwide, CCLA members have operations in over 200 countries; the Canadian Courier market translates to the movement of over 2 million packages per day encompassing approximately 2,400 courier companies across Canada. The courier environment is a multifaceted one, widely known as carriers employing air as well as ground movement of goods; we are also integrated logistics providers who execute a myriad of services such as: Customs clearance, warehousing, consulting, systems interface, freight forwarding, specialized transport as well as innovative supply chain solutions.

Our members embody the highest level of technology and investment of any mode in controlling and monitoring the progress of enormous volumes of time sensitive goods with tight delivery "cycle times," through their networks. The industries' focus on ensuring delivery reliability by deploying advanced systems and automated operations has contributed to advanced targeting methods developed internationally, proven to intercept contraband and threats to security.

\*Calculation excludes revenues derived from the various Physical Distribution services offered by Canada Post, whose primary business is postal services.

\*\*The CCLA has three types of membership categories; Regular, Supplier and Resource. For details about each type of membership please visit the Join CCLA section of our Web site.

## Industry Overview

It was during the late 1960's and early 1970's that businesses (mainly banks) first began to realize the value of having a dedicated delivery service other than Canada Post.

Industry growth was rapid from this time forward, with annual double digit increases right through until the mid 1980's, fueled by a series of postal strikes and an ever-increasing pace of business. In 2005 our regular, or courier company members have combined annual sales of over \$5.5 billion, which in turn represents over 87% of the total value of the courier market.\* CCLA members also employ and/or use the services of over 46,800 Canadians, operate just under 24,000 vehicles, hundreds of aircraft, and maintain over 3,200 operational centers across the country.

The courier industry may be broken down into two major segments;

a. Overnight Or Later Delivery: Shipments that are delivered at least one day after the day they are picked up. This segment of the market includes shipments delivered within Canada, to the United States or other countries around the world.

b. Sameday/Messenger: Shipments that are delivered the same day they are picked up. By definition, these tend to be primarily local and/or regional deliveries.

The overnight or later segment represents the majority (85%) of market activity.

Total industry compound annual growth between 2001 and 2003 was .9% for volume and 3.5% for revenue.

A weakening of the Canadian economy on both an export and domestic basis that began in the second half of 2000, along with various other extraordinary events (e.g. the 9/11 tragedy in the U.S., SARS, Ontario blackout, etc.) are seen as major drivers underlying the sluggish growth that has characterized market growth over the past few years.

Just over 55% of the total business handled by courier companies (in terms of revenue) is classified as "Express".

Among other defining characteristics, Express service features overnight delivery, usually before noon. In providing this level of service, it is absolutely critical courier companies utilize the most efficient and effective operational systems possible. Literally speaking, every minute counts. The share of business accounted for by Express is even higher for shipments traveling outside and/or coming into Canada. For example, on an export basis, over 80% of industry U.S./International revenue is accounted for by Express shipments.

Between 2004 and 2006 the industry experienced growth at 2.6% for volume and 5.9% for revenue on a compound annual basis.

Overall economic performance will continue to be the primary determinant of overall industry growth in the future.

In summary, the Canadian Courier industry is a key component in many companies' overall supply chain management strategies and contributes significantly to the success and well being of the overall Canadian economy.

Source: Breininger & Associates. (visit [www.breiningerassociates.com](http://www.breiningerassociates.com) for more information)

## **Additional Industry Information Sources**

While a complete listing of many links may be found in the Links section of our Web site, the following lists a number of recognized leaders in providing information and statistics on the courier industry:

Canadian Transportation & Logistics Magazine; [www.ctl.ca](http://www.ctl.ca)

Gestion Logistiques; [www.bomartgroup.com](http://www.bomartgroup.com)

Industry Canada; [www.strategis.ic.gc.ca](http://www.strategis.ic.gc.ca)

Infobase Marketing; [www.breiningerassociates.com](http://www.breiningerassociates.com)

Logistics Magazine; [www.logistics-mag.com](http://www.logistics-mag.com)

Materials Management & Distribution Magazine;  
[www.bizlink.com/materialsmanagementdistribution.htm](http://www.bizlink.com/materialsmanagementdistribution.htm)

Statistics Canada; [www.statcan.ca](http://www.statcan.ca)

Transport Canada; [www.tc.gc.ca](http://www.tc.gc.ca)

There are also two specialized research firms in the United States that do a limited amount of research on the Canadian market.

Air Cargo Management Group; [www.cargofacts.com](http://www.cargofacts.com)

Colography Group; [www.colography.com](http://www.colography.com)