

## Retailing in China 2009: A Market Analysis

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### REPORT COVERAGE

This report covers the market for retailing in China. The report covers the following sectors:

- Department stores
- Supermarkets
- Specialist stores (including clothing and other non-food specialist stores)
- Petrol stations
- Franchise stores
- Convenience stores
- Warehouse clubs
- Furniture stores
- Others

### KEY REPORT FEATURES

This recently updated report includes:

- The total, regional and sector value for retail sales, including urban/rural and food/non-food splits, up to the end of 2008;
- Statistical data on leading retailer market shares by sales in China up to 2007;
- Market data for each key provincial and urban region, in terms both of volume retail trade and the value of the local economy, up to 2008;
- Value forecast retail market, up to 2013;
- Key current issues , and discursive analysis of the key factors affecting the market;
- The domestic industry examined by key statistical indicators , including number of outlets and turnover, by sector and by key city;
- SWOT analysis
- Overview of China's demographics and macroeconomics.

### Executive Summary

Based upon our own calculations of a realistic retail market size in China should be, between 2001 and 2008, China's total retail market grew 197.63% in current terms over the review period to RMB6.18trn – representing an annual average growth rate of 16.91%.

Over the past few years, China's retail market has continued to develop rapidly. New chain store networks, malls and shopping streets are now emerging outside the top three cities of Beijing, Guangzhou and Shanghai, as retailers extend their reach to other first-tier cities, and now many second-, third- and other-tier cities. There is aggressive consolidation in the market, as larger operators swallow up smaller players, while there are equally significant numbers of failures, both retail companies and shopping malls.

Now, as the Chinese economy lurches from being one reliant on export manufacturing to one more reliant on a robust domestic consumer market, the retail market is becoming even more important to the country. The race is now on to create the infrastructure that will bring more of rural China into the fold of the

consuming classes, driving a need for new transport and storage facilities, computerised inventory, a closed chill-chain, modern management systems and all the other accoutrements of a developed retail system.

Foreign retailers and retail suppliers have much to offer in this market, but competition is tough, and the years of rapid retail growth in China could be about to end, making now a crucial time in which to gain a foothold.

China's retail market is expected to grow by about 43% between 2009 and 2013, to reach a total value of over RMB9.82trn.

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