

China Retail Industry Report, 2010-2011

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Abstracts

In 2010, the sales of China's top 100 chain enterprises hit RMB 1.66 trillion, up 21.2% YoY, accounting for 11% of the total retail sales of social consumer goods. In the meantime, the number of stores of top 100 chain enterprises reached 150 thousand in 2010, up 9.8% YoY, which was the lowest growth rate since 2003; moreover, 18 of the 100 enterprises didn't open new stores or even shut down existing stores in the year.

In 2010, among the top 100 chain enterprises in China, there were 21 overseas-funded enterprises, including 12 supermarkets, 5 department stores and 4 home appliance & catering enterprises. The total sales revenue of these 21 enterprises achieved RMB 353.9 billion, occupying 21.3% of the sales revenue of top 100 chain enterprises, with a YoY rise of 22.4%. In 2010, the store expansion rate and sales growth rate of overseas-funded enterprises were generally higher than those of domestic-funded enterprises. Specifically, 6 overseas-funded enterprises achieved a store expansion rate of over 20% in 2010.

Department store: In 2010, 35 of China's top 100 chain enterprises are department stores, whose average growth rates of sales revenue and outlet quantity reached 23.2% and 18.5% respectively, obviously exceeding the average level of chain industry. As for Dashang Group, its operating income registered RMB 24.343 billion, up 15.03% YoY. Till the end of 2010, it had approximately 73 department stores in total, with newly added 6 stores in 2010. It is expected that the number of department stores of Dashang Group will accumulate to 78 by the end of 2011.

Supermarket: In 2010, overseas-funded supermarket enterprises kept a rapid development pace in general. Top 5 overseas-funded supermarkets opened 140 new stores, up 22% YoY. Among domestic-funded supermarket enterprises, CR Vanguard continued to hold the leading position, with its operating income increased by 5.6% YoY to RMB 71.8 billion in 2010. As of the end of 2010, it had approximately 3,155 stores, up

7.8% YoY.

Jewelry: During 2010-2011, among domestic jewelry enterprises, Shanghai Lao Fengxiang Co., Ltd. has kept the leading position, with its operating income increased by 49% YoY to RMB 6.49 billion in Q1 2011. Till the end of 2010, Lao Fengxiang had 516 franchised stores, and plans to add 150-160 more in 2011.

With an aim to explore the market potential and master the development trend of China's retail industry, this report makes an in-depth analysis of key issues in the industry, including the status quo of China's retail industry, related policies, investment and financing situation, operation of enterprises, and market segments.

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