

Competition pattern and Investment Risk of Cross-border E-commerce Industry in China 2016-2021

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Abstracts

It takes 3-5 business days to dispatch the report after the purchase is made.

The concept of cross-border e-commerce can be interpreted in a broad or narrow sense:

Broadly, the cross-border e-commerce refers to the cross-border import and export trade activities in which the transactions are concluded by the transaction participants belonging to different customs territories respectively by means of e-commerce.

Narrowly, the cross-border e-commerce refers in particular to the cross-border e-retailing which is one new business pattern of international trade that the transactions are concluded by the transaction participants belonging to different customs territories respectively by means of conclusion of transaction through e-commerce platform, cross-border payment and settlement and delivery of goods through cross-border logistics.

The cross-border e-retailing is one new trade pattern as a result of development of Internet to a certain stage.

In terms of type of interaction, the type of cross-border e-commerce is mainly divided into B2B, B2C, C2C, etc., in which the B2C and C2C are directly interacted with the final consumers, therefore collectively referred to as cross-border e-retailing; in terms of the business entity, the cross-border e-retailing is divided into platform type, self-run type and mixed type (platform + self-run).

In 2014, China innovated the regulatory system for cross-border e-commerce retail import, contributing to the rapid development of the cross-border e-commerce retail import in China and leading to the emergence of a number of cross-border e-commerce retail import platforms and enterprises including TMall.HK, koala.com, jumei.com, ymatou.com and xiaohongshu.com. The whole industry ushered in an explosive growth

in 2015.

Although the growth rate of global trade in 2015 slowed down, cross-border e-commerce in China grew against the trend, the e-commerce penetration rate in import & export trades continued to improve. Cross-border e-commerce retail is yielding unusually brilliant results as the new trade form in Internet Era, accounting a significantly increasing share in China's cross-border e-commerce market. Technical progress, industrial foundation, consumption upgrading and credit security will be four drivers of the growth of cross-border e-commerce in China.

The trade scale of cross-border E-commerce was about RMB4.8 trillion in 2015, with YoY growth of 28%. By estimates, the trade scale would reach RMB12 trillion by 2020, the CAGR reaches 20.1% during 2015 to 2020.

Relative agencies predict that trade size of global cross-border e-commerce will increase to 31.34 trillion in 2016 and total network export value of the 6 main e-commerce markets including America, Britain, Germany, Northern Europe, the Netherlands and France, will grow 5 times in 2020, especially Asia-Pacific region guided by China will gain the fastest growth in global cross-border e-commerce market with 30 percent of market shares, increasing faster than the other regions in global trade and leading the growth with more market shares of global trade in the future.

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