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China Cross-border E-commerce Industry Overview, 2017-2021

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Abstracts

Description

Cross-border E-commerce refers to import and export activities of cross-border trade conducted through e-commerce methods by transaction subjects from different customs borders. It is mainly classified into B2B and B2C.

In B2B, commercial platforms of cross-border e-commerce are added into the traditional international trade for staple cross-border transactions through information presentation, credit guarantee and payment means, which is still traditional in nature. In B2C, the cross-border transaction is conducted from concentrated purchase of merchants, storage in bonded warehouse and overseas warehouse to terminal consumers through express delivery, which reduces the costs of intermediate links and promotes the retail business of cross-border e-commerce. B2C is a new type e-commerce trade, of which the growth exerts significant impact on traditional trade and logistics mode.

With the increasing disposable income per capita, China is experiencing a new round of consumption upgrade. According to estimation, the number of middle class families with an annual income of over CNY 120,000 will exceed 200 million by 2020. The demand of Chinese consumers for mid-end and high-end skin care products, mother and baby products and health care products increases while most domestic products are inferior in quality but high in prices. Therefore, cross-border e-commerce platforms satisfy the import need of such domestic consumers for foreign goods.

The platforms of B2B and B2C emerge rapidly with the development of cross-border e-commerce industry in China from 2014. Leading enterprises in the e-commerce market such as Alibaba.com and JD.com together with some non e-commerce enterprises such

as NetEase all step into the cross-border e-commerce field. In addition, some logistics and payment platforms start the layout of cross-border e-commerce as well. Meanwhile, global e-commerce enterprises such as Amazon.cn enter the cross-border e-commerce market in China with integrated supplier resources, and many overseas e-commerce websites open the business of direct delivery to China.

In 2015, the import origins of top 10 cross-border e-commerce products in China included the U.S.A., Japan, Germany, South Korea, Australia, Holland, France, the U.K., Italy and New Zealand, of which the products are preferred by Chinese consumers. According to CRI, Chinese consumers purchased commodities from 3 countries by average per capita through cross-border e-commerce in 2016, of which the most active consumers purchased commodities from 20 countries. The cross-border e-commerce industry provides selectivity freedom to Chinese consumers towards global products.

In terms of import categories, three major categories including mother and baby products, cosmetics for personal care and nutrition health products pull the import of cross-border e-commerce retails. Generally, cross-border e-commerce becomes the major new channel for Chinese consumers to purchase these products with the improving requirements on qualities of health and safe products. For example, infant formula sold on cross-border e-commerce platforms exerts great impact on the domestic industry.

Chinese government presents ambivalence towards the policy formulation concerning the cross-border e-commerce industry. On one hand, it energetically supports the cross-border e-commerce and issues preferential policies for less product smuggling, better development of Chinese economy and more tax with more employment. On the other hand, the emerging cross-border e-commerce exerts great impact on traditional import industry leading to less tax and value added tax revenue so Chinese government has to enhance the supervision and regulate the tax rate to suppress the excessively rapid expansion of cross-border e-commerce. Such policy ambivalence will impact the cross-border e-commerce industry. However, commodities sold on cross-border e-commerce platforms are superior to that of domestic ones or imported ones through normal channels in terms of prices and quality so it presents a positive development trend in general.

The total import and export value of commodity trade was CNY 24.59 trillion in China in 2015 decreasing by 7% compared to 2014. Meanwhile, the import value was CNY 10.45 trillion decreasing by 13.2% YOY. It is estimated that the foreign trade presents a

negative trend with huge downward pressure in China in the next few years. However, the growth rate of cross-border e-commerce surpasses that of the import and export of commodity trade with an increasing penetration rate in China. The trade value of cross-border e-commerce reached CNY 4.8 trillion increasing by 28% YOY in China in 2015 and it is expected to exceed CNY 6 trillion in 2016. According to estimation, the trade value of cross-border e-commerce will exceed CNY 14 trillion by 2020 with the CAGR reaching 20% from 2015 to 2021.

Through this report, readers can acquire the following information or even more:

Development Environment of Cross-border E-commerce Industry in China

Supply and Demand Status of Cross-border E-commerce in China

Market Competition of Cross-border E-commerce in China

Major Cross-border E-commerce Enterprises and Their Operation Status in China

Major Driving Forces and Market Opportunities in China Cross-border E-commerce Industry

Risks and Challenges in China Cross-border E-commerce Industry

Prediction on Market Scale of Cross-border E-commerce in China

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