

Research report of China retail trade market and investment, 2008

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Abstracts

Since Dec. 11th 2004, China retail trade has been fully opening up to foreign capital, and 2005 is the first year to carry out this all-round opening up, in which a great variety of scale merits had acquired historical breakthroughs. The total volume of retail sales of consumer goods of whole nation is 6,717 billion RMB (USD 820 billion), 12.9% higher than 2004, which demonstrates both the potential and practical driving growth of the demand of China consumer goods.

In 2007, the gross China retail market of consumer goods had kept growing up steadily, the total volume of retail sales of consumption goods over the year reached 8900 billion RMB, 17.1% higher than 2006.

Undoubtedly, China has become the most important consumer market in the world, which had been foreseen by magnates more than 10 years ago. These big notches of retail trade had already landed on China and took possession of beachheads, although the investment situation at that time was still not as much as one wishes and the entering into WTO has not been set into shape.

According to the data issued by the department of commerce, the fast growing item with the direct foreign investment in 2007 was the wholesale and retail trade. The department anticipated that foreign investment would accelerate the speed of entering into China continuously. In fact, the speed of developing is only a straight reflection of the differences between China retail corporations and foreign ones. Moreover the core matter of the two parties lies in the difference of competitiveness.

Until the end of 2007, Carrefour had been possessed of 109 GMS (General Merchandise Store) in China; while including 102 Trust-Mart, Wal-Mart had held 100

stores. In 2007, Carrefour set up 19 new shops, Wal-Mart started up 29 new shops. The 11 foreign retail dealers, managing superstores mainly, started up over 100 stores, exceeding the corresponding period last year. Correspondingly, the growth rate of Bailian Group and Dazhong Electronics in 2007 was only 2%.

In 2006, among the Top 100 chain stores, 18 stores operated by foreign brands just set up 20% more, lower than the average level, but the sale volume went up 27%, higher than the mean level. And 11 of them, overseas-funded enterprise, dealing in superstores mainly, operated 567 ones in number, 102 more compared with that in 2005. The sale volume per store was 2.15 billion RMB, rising 5% on an annual basis, far greater than that of the domestic counterparts.

In 2003, the average gross profit rate of China retail corporations was only 9%, however that of foreign retail enterprises reached 24%, 15 point of percentage higher. It demonstrated that there was a huge gap of the ability to control procurement cost and logistic delivery cost between China retail corporations and the advanced international standards.

Furthermore the disparity of the ability of brand value between China and foreign retail enterprises tells its own story. Withal, during fighting about talents, the former was in apparent disadvantage, while the latter, by right of its munificent deal, consummate career planning and favorable enterprise atmosphere, has already took the lead in winning the favors of job seekers, which will reversely aggravate the conflicts of the shortage of senior executives in the former.

Although the fierce offensive of international retail groups has brought all-round impacts and challenges to China commerce, the domestic enterprises should seize the opportunity and conquer the threats to enhance the entire quality of our retail trade, rather than become therefore pessimistic. In view of so extensive China being, the circumstances are complicated. Great differences exist between urban and rural, among regions, which forms the dispersity, diversity and hierarchy of consumption. It is impossible to meet all wants by only a few capital groups or several types of operation.

This report analyzed China retail trade's status in quo and its tendency of development. It not only described the actuality, operation and strategies of overseas-funded enterprises in China retail markets, but also indicated the existing opportunities and threats of investment and come out with some risk-aversion suggestions. It is of considerable reference value due to its through knowledge of the situation of China retail trade and the grasp investment opportunity.

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