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Research Report on Chinese Chain Operation Industry 2011-2012

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Abstracts

As a form of retail business, chain operation first emerged and developed in the U.S.A., and gradually spread to other countries around the world.

Pierre Cardin exclusive shop located in Beijing, China's first enterprise in the form of trademark franchise, started business in Aug. 1984, which was regarded as the beginning of Chinese chain operation industry. In 1986, Tianjin Leadar Group Co., Ltd. set up Tianjin Leadar International Market, and took the lead to establish chain stores in China, starting Chinese domestic chain operation. For over 2 decades, chain operation, as a corporate organization form particularly represented by household appliance retail, pharmaceutical retail, hospitality and catering industries, has enjoyed a boom in China.

As statistics show, in 2010, sales scale of Chinese Top 100 chain enterprises reached CNY 1.66 trillion, increasing by 21.20% YOY, and their sales revenue accounted for over 10% of total retail sales of Chinese consumer goods.

According to international experience, once GDP per capita of a country exceeds USD 3,000, consumption of the country begins to grow. Chinese GDP per capita had exceeded CNY 3,000 in 2008. Urbanization becomes the important impetus to the growth of consumer demand. Chinese urbanization rate broke through 30% in 1996, thus China entered the rapid urbanization stage. In 2010, Chinese urbanization rate was about 47%, lagging far behind that in developed countries, which also signifies the huge space for Chinese urbanization. Per 1% rise of Chinese urbanization rate will result in urban population increase of over 13 million as well as bring enormous growth of consumption demand.

According to the statistics of the National Bureau of Statistics of China, in 2010, China's

GDP was up to CNY 39.80 trillion, rising by 10.30% over 2009, and total retail sales of Chinese consumer goods was CNY 15.70 trillion, ascending by 18.30% over 2009.

According to the development experience of global chain operation industry, high-income and populous regions are the hotbeds for the chain operation industry development. However, unbalanced levels of regional economic development lead to different levels of the chain operation industry development in different regions.

In 2008-2009, facing the influence of the international financial crisis, Chinese small and medium-sized retailers chose to reduce business scope, while large retailers tended to carry out expansion, i.e., supermarkets, department stores and household appliance chain enterprises implemented business expansion through establishing new shops and carrying out mergers. Therefore, it can be seen that investors are optimistic about the development prospect of Chinese retail industry. Since the costs of setting up a new shop and merging with retail enterprises with poor operation are low in the economic downturn, enterprises can realize low costs for expansion reversing the market tendency, so as to make competition preparation for a new round of industrial growth.

The Chinese government and local governments began to continually release incentive policies from the end of 2008 so as to promote the increase of domestic demand.

To regulate and promote the development of Chinese chain operation industry, the Chinese government keeps issuing various direct and indirect management policies in recent years. In the short term, some policies may bring bad effects to the industry development, but these policies will have a promoting effect on future healthy development of the industry in the long term.

With the growth of Chinese economy and increase of income per capita, Chinese chain operation industry will maintain a rapid growth in the next few years.

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