



# Retail in China 2008

## Market analysis and development forecasts for 2008-2010

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## A word from the author



“The already significant Chinese retail market, worth €685bn in 2007 and driven by the country's strong economic growth and customers' rising incomes, is set to continue to develop vigorously. Despite prevailing regional disparities between the cities and the countryside, overall, considering the country boasts the world's largest population, a great number of cities still underdeveloped in terms of an existing modern retail network and emergence of savvy, middle-class customers, China is a promising land for retailers, but only those which are able to adapt to local requirements.

The relaxation of the government's attitude toward foreign investment in retail as well as direct sales, is expected to continue to stimulate the enthusiasm of foreign retailers, for developing a presence and increasing the rate of penetration in China. Meanwhile, upcoming international events, including the 2008 Olympics in Beijing and World Expo 2010 in Shanghai, are expected to provide a considerable impetus to retail sales in China”.

**Małgorzata Machnicka**, Head Retail Analyst

## PMR MarketInsight Methodology

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PMR MarketInsight is the result of over 10 years of experience in conducting industry analysis on Central and Eastern European markets.

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Methodology

The combined turnover of retail chains operated by the 20 largest companies involved in retail trade in China amounted to €60bn in 2007, constituting over 7% of total Chinese retail sales.

## Report description

**Retail in China 2008** is the first PMR publication to focus on the retail market in China. This brand new report presents vital statistical data and analysis on the market as a whole, and also covers each individual segment – grocery, consumer electronics (includes mobile phone segment) clothing and footwear, cosmetics and toiletries, and DIY. Major market trends and influences are explored, and leading industry players are profiled at length. The challenges of selected retailers are also described via interesting case studies.

**Retail in China 2008** features some **40 specially constructed profiles** of leading consumer retail outlets in China, both grocery and non grocery, operating in all major sectors. The profiles include vital data such as: country of origin, entry/set up date, number of stores for 2007, revenue for 2007 and y-o-y change, brief company history, and insights on strategy and plans for the future.

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## Key sections

**Section One presents an overview of the economic and demographic situation** in China. Statistics on population from 1990-2007 are provided, along with an extensive treatment of the leading macroeconomic indicators, such as GDP growth, CPI 2001-2007, unemployment for 2002-2008, and average disposable income.

**Section Two provides an overview of the retail sector** in China. It tracks market value and development from 2001-2007, gives an overview of current conditions and provides forecasts for the period 2008-2010. Influential trends are analysed and the commercial property market in China is evaluated.

**Section Three concentrates on the grocery retail market**, providing an overview of market value from 2001-2007, along with forecasts for 2008-2010. Market trends and major distribution channels for grocery products are described, along with the grocery outlets operated by major retailers across China. Leading players are ranked by 2007 sales, and profiles of these companies are provided.

**Section Four focuses on the non-food retail market**, presenting an overview of the Chinese non-food retail segment and data on market value from 2005-2007, along with forecasts for the period 2008-2010 for each of these segments: consumer electronics market, fashion market, cosmetics and toiletries market, and DIY market. Leading players are ranked by 2007 sales, and profiles of these companies are provided.

The annual per capita net income of urban households in China (€1,259 in 2007) was over three times larger than that of rural households. It also grows more dynamically.

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China's retail industry will see more merger and acquisition activity in the years ahead, as the more business-friendly policy encourages foreign retailers to expand their Chinese businesses.

## Report overview

Understanding the economic and demographic forces at work in China is crucial to an effective evaluation of the current retail market, as well as the projected trends and forecasts for the industry.

This report contains all the pertinent economic and demographic data, including:

- GDP growth and CPI for 2001-2007
- unemployment rates for 2002-2008
- average disposable income of Chinese urban residents 2004-2007
- population statistics for 1990-2007.

Retail in China 2008 provides a comprehensive overview of the retail market in China, featuring:

- retail market values 2001-2010
- trends that have influenced and continue to effect market development
- leading retailers in China, listed by 2007 sales data
- commercial property market details
- retail market forecast 2008-2010.

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The report presents a comprehensive overview of the grocery retail sector of the market, including market value and dynamics statistics and forecasts for the years 2005-2010, followed by information on:

- the various distribution channels
- types of grocery outlets being developed in China
- leading grocery retailers in China, listed by 2007 sales
- detailed profiles of selected players.

Non-food sales represent a large portion of the retail market in China. An overview of this segment is presented along with market value and dynamics data and forecasts for the period 2005-2010, along with details of leading market participants from each of these segments, listed by 2007 sales:

- consumer electronics retail market, including mobile phone chains
- clothing and footwear retail market
- cosmetics and toiletries retail market
- DIY retail market.

Foreign retailers are dominant in the supermarket and hypermarket formats of the grocery market but are also becoming active with regard to convenience stores, specialist outlets (DIY, cosmetics etc.) and department stores.

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Value of Chinese clothing and footwear market is to exceed RMB 1,000bn (€90bn) in 2009.

## The information provided in Retail in China 2008 targets the needs of:

- retail business currently operating in China, as well as those considering expansion into this growing marketplace
- producers and suppliers looking for new markets for their products
- companies that support retail businesses with products and services such as supplies and information technology
- consultants and analysts that provide advice and intelligence to governmental and business organizations and those seeking investment opportunities.

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