

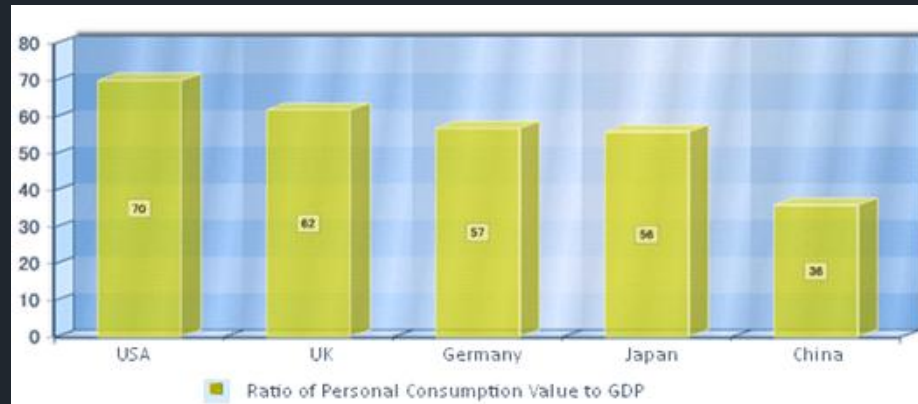
# China Supermarket Industry Report, 2009



China's personal consumption value has exceeded US\$890 billion, and China has become the 5th largest consumption market, just behind the USA, Japan, Britain and Germany. However, huge potential in China's consumption demand still desires to be fully released. The ratio of China's personal consumption value to GDP is only 36%, half of the USA figure and two thirds of the figures in Europe and Japan.

As the overseas consumption environment becomes more severe and the exports decline, China has rendered domestic demand expansion and the stimulation of residents' consumption as one future focus. With the continuous improving of the consumption environment, the consummation of social security system, the expanding of educational financing and consumer credit as well as the rising of household income, China's personal consumption ratio to GDP will witness remarkable rise from the current 36% and gradually reach the level of developed countries. The chain supermarkets focusing on necessities sales will enjoy broad development room in the future.

## Ratio of Personal Consumption Value to GDP in Major Countries



Source: National Bureau of Statistics of China

Strictly, no domestic-funded supermarkets have successfully realized national expansion; and the companies that have achieved successful cross-region expansion are just strong in some region, such as Vanguard in Guangdong and Jiangsu, Lianhua Supermarket Holdings Co., Ltd in Shanghai, Beijing Hualian Hypermarket Co., Ltd. and Wu Mart in Beijing and its surrounding areas.

Following the accelerated development of chain supermarkets in the Yangtze River Delta and coastal regions in 1990s, the chain supermarkets in inland regions, mainly including central and western provinces, are expected to welcome a booming period.

Based on the data of China Chain Store & Franchise Association, State Information Center and National Bureau of Statistics of China, etc authoritative channels, the report makes an in-depth research of the development of China supermarket industry and key enterprises and a forecast of future trends of the industry; besides, it discusses the investment opportunities and risks in the industry.

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