



China Franchise Market Report, 2010

Jan. 2011

This report

- ◆ **Analyzes the status quo and development of China's franchise market**
- ◆ **Highlights the operation and development of major enterprises in franchise market in China.**
- ◆ **Describes the characteristics of the China's franchise market and future trends**

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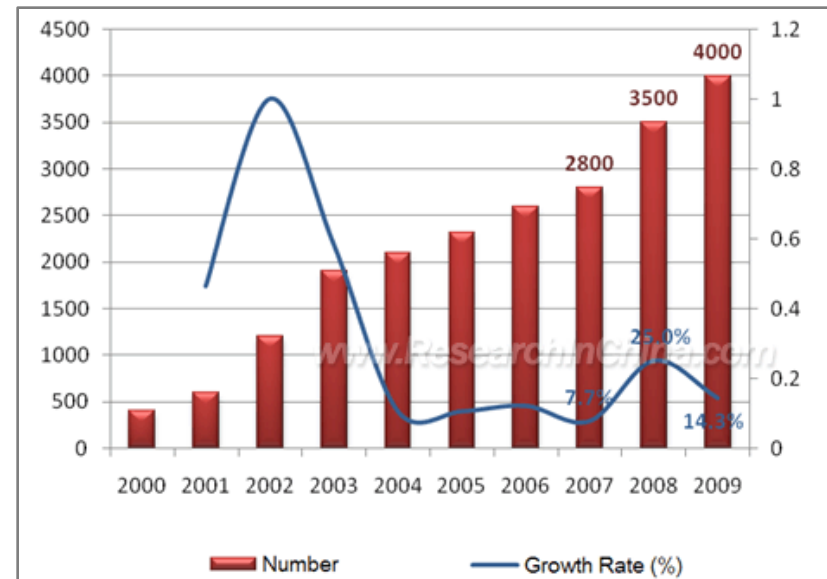
China Guarantee Industry Investments and Market Outlook to 2011

Abstract

In 2009, China's franchise industry experienced rapid development, the number of franchise systems broke 4,000, up nearly 15% over 2008; the total number of franchised stores exceeded 330,000, and each franchise system had 83 franchised stores on average. By industry, franchise systems were mainly concentrated in retailing, catering, and service industries in China in 2009, with the proportions of 44%, 30% and 26% respectively. Service franchise enterprises, especially, witnessed the fastest growth.

In 2009, the main features of the Chinese franchise market were: franchise enterprises in retail and catering industries developed swiftly; more categories of industries ranked among top 100 Chinese franchise enterprises, indicating the rapid advance of some new service industries in the field of franchise.

Number of Franchise Systems In China, 2000-2009



Source: China Chain Store & Franchise Association;
ResearchInChina

In 2009, Lianhua Supermarket Holdings Co., Ltd., Suguo Supermarket Co., Ltd., YUM! Restaurants (China) Investment Company Limited, Linyi Xincheng Jinluo Meat Products Co., Ltd. and Wenfeng Great World Chain Development Ltd. ranked top 5 in the franchise field of China. As of the end of 2009, these five companies achieved the total sales income of RMB171.962 billion, with 25,320 chain stores. Lianhua Supermarket Holdings Co., Ltd. has taken the first position in recent years. From January to June of 2010, it had 5,040 stores, achieved total turnover of RMB13.009 billion (up 5.9% year on year), and gross profit of RMB1.753 billion (up 13.8% year on year), showing robust growth momentum.

In the next 5-10 years, Chinese franchise market will show the following four characteristics:

- The industry will be reshuffled, and weak franchise companies will be phased out;
- The franchise market will expand to the second and third tier cities, urban-rural fringe areas, and rural areas;
- More and more franchise brands with Chinese characteristics will emerge, and some Chinese traditional franchise brands have comparative advantages;
- M & A will occur more frequently, and the concentration degree of top 100 enterprises will be further enhanced.

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