



# China Online Group Buying Industry Report, 2010-2011

Apr. 2011

## ***This report***

- ◆ **Analyzes the basic concept of online group buying.**
- ◆ **Focuses on the development of online group buying industry in China , such as market size , competition , investment & financing and trends.**
- ◆ **Highlights the operation and advantages & strategies of key enterprises in online group buying industry in China .**

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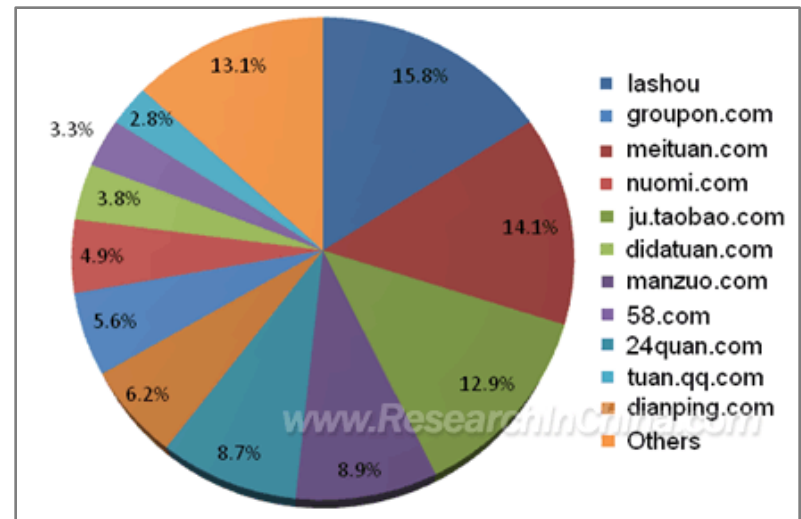
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## Abstract

In 2010, Chinese online group buying market emerged. Group-buying websites not only explore more and more product suppliers and consumers, but also expand to second and third-tier cities based on Beijing, Shanghai and other first-tier cities rapidly. In less than a year, the number of Chinese online group buying users registered 18.75 million, and the sales valued RMB1.66 billion.

According to the monitoring of ResearchInChina on major group-buying websites in China, Chinese online group buying market characterizes a low concentration degree. Lashou and Meituan.com took the first and second position by virtue of their first-mover advantages in the market in 2010, with 15.8% and 14.1% shares, respectively. Relying on the huge user base and excellent merchandisers of Taobao Mall, ju.taobao.com took the third position with mail products. In 2011, Taobao's open strategy will threaten Lashou and Meituan.com.

**Sales Percentage of Major Group Buying Enterprises in China, 2010**



Source: ResearchInChina

In China, group-buying websites have arisen since March 2010. By the end of December 2010, the number had approached 2,000. According to their backgrounds, group-buying websites fall into four categories.

First, emerging third-party independent group-buying websites, such as Meituan.com, Lashou, Groupon.cn, Gaopeng.com, Manzuo.com, and Didatuan.com. These websites were set up earlier, and they ranked among top ten in market shares. In 2010, they obtained the funds from investors. Then, they project huge capital into the advertising to attract consumers in 2011.

### Investment and Financing of Chinese Group-buying Websites, 2010-2011

Month/year	Group-buying Websites	Number of Financing Cases	Raised Funds
May, 2010	Kutuan.com	1	RMB10 million
May, 2010	5151tuan.com	1	RMB20 million
Sep. 2010	Manzuo.com	1	USD10 million
Sep. 2010	Tuanp.com	1	RMB30 million
Dec. 2010	Didatuan.com	1	USD10 million
Mar. 2010-Dec. 2010	Lashou	4	USD60 million
Apr. 2010-Dec. 2010	Groupon.cn	2	RMB300 million
May, 2010-Jun. 2010	Ayatuan.com	2	RMB120 million
Jun. 2010-Mar. 2011	Ftuan.com	2	USD35 million

Source: ResearchInChina

Second, group buying websites subordinated to e-commerce websites, such as Ju.Taobao, 360buy Tuan, Paipai Tuan and so forth. They have considerable high-quality merchandise resources. They entered the field of e-commerce earlier, so they own a large number of users. They enjoy inherent superiority in group buying sector, which can be shown from the sales share of Ju.Taobao in 2010.

Third, group buying channels of SNS websites and web portals, such as Nuomi, Kaixin001 Tuan and Sina Tuan, and QQ Tuan. Usually, they have more resources in users and information promotion. Nuomi and QQ Tuan was in the ascendant in 2010, with the sales reaching RMB81.30 million and RMB46.30 million respectively, and accounting for 4.9% and 2.8% of the total market sales.

Last, life service websites, such as Dianping Tuan, 58 Tuan, and Fantong Tuan. Compared with the second and third categories, they have fewer users, but more merchandise resources, with concentrated target users. In 2010, Dianping Tuan and 58 Tuan both made remarkable achievements and obtained the sales of RMB103 million and RMB54 million respectively.

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- Online Group Buying Industry Chain in China
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- Group Buying Events in China, 2010-2011
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- Baidu Search Index of Group Buying, Mar. 31, 2010-Mar. 31, 2011
- Major Manufacturers and Their Shares in Chinese Group Buying Market, 2010
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- Sales and Number of Buyers of Meituan.com, Mar. 2010-Jan. 2011
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- Sales and Number of Buyers of Nuomi.com, Jul. 2010-Jan. 2011
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- Sales and Number of Buyers of Dianping.com, Jun. 2010-Jan. 2011
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- Sales and Number of Buyers of Manzuo.com, Apr. 2010-Jan. 2011
- Sales and Number of Buyers of 58.com, Jun. 2010-Jan. 2011
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- Revenue and Proportion of tuan.qq.com by City, Jul. 2010-Jan. 2011
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