



China Online Shopping (B2C) Market Report, 2011-2012

Mar. 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information source is CNNIC.

Abstract

With the expanding of Chinese economy and the growing number of netizens, online shopping sees significant growth in market size and increasing investment activities. The number of online shoppers in China registered 158 million in 2010 and 198 million in 2011.

It is in the report that covers the followings:

- Characteristics and status quo of B2C market and relevant policies in China;
- Investment analysis of Chinese B2C market;
- Status quo and development trend of 6 kinds of B2C websites including general merchandise, food & gift, clothing & bags, digital & home appliances, health care and beauty supplies, maternal & child care.
- Operation, development, investment and sales of **23 B2C businesses covering Tmall, 360buy, Yihaodian, Xiu.com, Vancl, Newegg China and Suning Yigou.**

Since 2010, investment activities intensively have arisen in Chinese e-commerce industry, which can be attributed to the following aspects. On the one hand, the Internet is increasingly used in business field more than in entertainment area; and on the other hand, e-commerce serves as the optimal medium to combine the Internet and traditional consumption.

In China, e-commerce firms usually thrive from vertical B2C, that is, focusing on one or two market segments in order to grow big and strong. However, some vertical websites have started to commit themselves to becoming big and all-embracing platform since 2010. The shift from vertical type to comprehensive platform can utilize market resources to the maximum and accelerate the process to become competitive. So Dangdang and 360buy, featuring books and electronics, spared no efforts in diversifying its product categories and in entering the fields of clothing and daily necessities.

The rapidly expanding market size of Chinese food e-commerce industry suggests that the demand is extremely large in China. But the industry access requirement is higher than expected, so the industry practitioners that lack advantages in product supply chain and are unfamiliar with the e-commerce service system are easily driven out of the market. On October 26, 2011, casual snacks B2C Ximi.com announced the closure and the CEO revealed that the website was overburdened by high logistics costs.

After the clothing and bag online shopping boomed in China in 2010, it tends to grow stable and is expected to break RMB100 billion in 2012.

According to the data from Tmall.com, the largest B2C portal in China, from January to November of 2011, the total online retail sales of large home appliances was nearly quintupled over the same period of the previous year, with growth rate far exceeding that of traditional retailing market, of which, the online transaction for home appliances in the second and third-tier cities saw the fastest growth rate. Consumers in the second and third-tier cities may not be able to purchase the latest products in local shopping mall, and the online shopping breaks through geographical boundaries, so the consumers can easily buy the latest electrical products as long as they can be reached by express delivery service. More manufacturers choose Tmall.com to release their new products, which also helps boost the sales in the second and third-tier cities.

In 2010, the drug retail market size in China approximated RMB173.9 billion, with online sales of just over RMB100 million, while the sales of online drug stores in the United States accounted for nearly 30% of the entire drug distribution industry, from which it can be seen the Chinese drug B2C market enjoys great development potential.

1 Overview of Chinese B2C Market

- 1.1 Definition of B2C
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- 1.3 Market Features

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4.4 360buy.com

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