



INTRODUCTION

China, one of the most fast-changing FMCG markets in the world, has been growing at a staggering pace for the last 10 years. It is creating opportunities and challenges for both multinational and local suppliers. As a result, understanding the market's structure and development is as important as ever to successful marketing.

Retail Market Study Results

In regions covered by ACNielsen's 2004 Retail Market study, there were an estimated 4.5 million outlets compared to 4.6 million in 2003, that handled fast moving consumer goods (FMCGs) in cities and towns. This represents an annual growth rate of 0%.

Sales of FMCG products through these outlets have grown from RMB 38.5 billion in 2003 to 40.6 billion in 2004. This represents an annual growth rate of 5% compared to the 2003 estimate of 38.5 billion. Thus sales per store has grown by 9%.

The changes by geography, population centre and store type all vary significantly from the national averages. Sales of cities growth fast than town while significant growth of the modern trade* is again evidenced. The number of modern trade stores has increased 35% from 2003, which contribute by convenience stores .but sales have increased 21% meaning that the sales per outlet have decreased. This would mean that one must achieve distribution in a growing number of stores, in order to remain exposed to the same share of consumer expenditure.

前言

作为全球最富有生机的快速消费品市场之一，过去10年以来中国一直在以惊人的速度持续增长。这无疑给本土企业和外资企业都带来了许多机会和挑战。正因为如此，了解零售市场的结构和发展态势开始变得和制定成功的市场策略同样重要。

零售普查结果

在AC尼尔森2004年零售普查所覆盖的区域当中，预计城镇地区共计有450万个销售快速消费品的零售网点，与2003年相比未有增长。

这些零售网点的销售额在2002年为362亿元，2003年这一数字大约为385亿元。2004年的销售额进一步达到406亿元，同比增长了5%。由于零售网点数量已开始减少而销售额有5%的速度增长，因此单店的销售额与2003年相比增长了9%。

不同地理区域、不同人口分布以及不同门店类型与全国整体趋势相比情况都有明显的差别。整体销售额上，城市比乡镇增长尤其迅速，而现代渠道*的增长仍然明显。现代渠道门店数量较2003年增加了35%，当中的增长由便利店所带动，意味着门店的开设更贴近消费者。而同时销售额的增长率仅为21%，因此单店的销售额呈下降趋势。这也意味着为争取到同等比例的花费，生产商需要增加铺货的范围，把货铺到更多的门店。



The modern trade, accounts for less than 1% of total national store count but contributes 33% of total national sales and 57% of key city (4 key cities + 23 A Cities) ** total sales. Hypermarkets at the national level have increased by 37% in store numbers between 2003 and 2004, and 26% in sales, which means that the per store sales have decreased by 8%.

现代渠道仅占全国零售网点总量的1%，但其销售额所占的比例却占了全国销售总额的33%以及主要城市(4大重点城市加上23个A类城市)**销售额的57%。2004年全国大卖场的门店数量增长了37%，但销售额仅增长了26%，因此单店的销售额下降了8%。

Although the modern trade is increasing, the traditional trade *** still accounts for 99% of outlets, and there has been annual growth of -4% from 2004, whilst sales have decreased 1% V.S. 2004. Per store sales have slight growth of 5%.

虽然现代渠道在持续增长,传统渠道***仍然占有所有零售网点的99%,与2003年相比销售额下降1%,门店数量减少4%,因此单店的销售额上升了5%。

Note:

* Modern trade includes hypermarkets, supermarkets, convenience stores.

** 4 Key Cities: Beijing, Shanghai, Guangzhou, Chengdu
23 A Cities:
North: Changchun, Dalian, Haerbin, Shenyang, Taiyuan, Shijiazhuang, Qingdao, Jinan, Tianjin,
East: Hangzhou, Nanjing, Zhengzhou, Hefei
South: Wuhan, Changsha, Fuzhou, Nanchang, Shenzhen
West: Chongqing, Xi'an, Guiyang, Nanning, Kunming.

*** Traditional trade includes groceries, kiosks and other miscellaneous store types

注解:

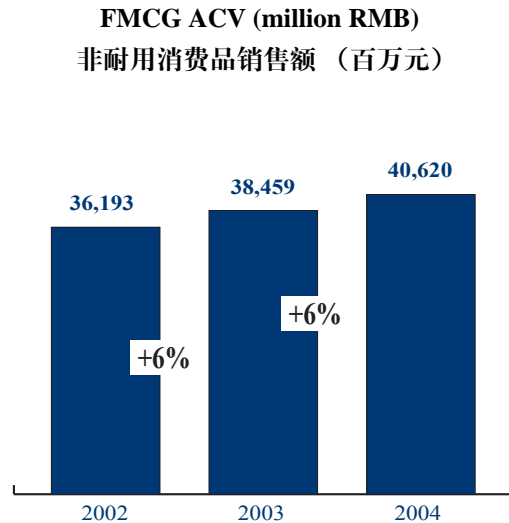
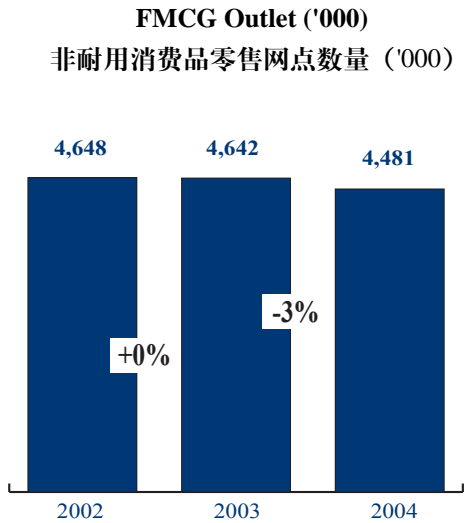
* 现代渠道包括大卖场、超市、便利店。

** 4个重点城市: 北京、上海、广州和成都
23个A类城市:
北区: 长春、大连、哈尔滨、沈阳、太原、石家庄、青岛、济南、天津
东区: 杭州、南京、郑州、合肥
南区: 武汉、长沙、福州、南昌、深圳
西区: 重庆、西安、贵阳、南宁、昆明

*** 传统渠道包括杂货店、售货亭以及其他类型的店铺。



FMCG Retail Market Development
非耐用消费品零售市场总体发展
ACNielsen Defined National (City & Town) AC 尼尔森定义的全国(城市 + 城镇)



Growth Rate of FMCG Outlet Count & Sales Turnover
非耐用消费品零售网点数量和销售增长率

	FMCG Outlets % Chg 04 vs 03 网点数增长率 04年比03年	FMCG Sales % Chg 04 vs 03 网点销售额增长率 04年比03年	FMCG Sales/Outlets % Chg 04 vs 03 单点销售额增长率 04年比03年
ACNielsen Defined National (City+Town) AC 尼尔森定义的全国 (城市 + 城镇)	-3	6	9
Cities 城市	2	7	9
Towns 城镇	-5	0	6
Hyper/Supermarket 大卖场 / 超市	35	21	-10
Grocery/Kiosk 杂货店 / 售货亭	-8	-1	8
All Other Stores 其他类型商店	6	1	-6

Source: ACNielsen Retail Market Study / 资料来源: AC 尼尔森零售普查



FMCG Retail Market Structure by Shop Type
非耐用消费品零售市场结构（按商店类型划分）

ACNielsen Defined National (City & Town) AC 尼尔森定义的全国（城市 + 城镇）

	FMCG Store Counts Number of Outlets 售卖非耐用消费品的商店数			Annual Growth 年度增长率 (%)	Monthly FMCG Sales Million RMB 非耐用消费品月销售额（百万元）			Annual Growth 年度增长率 (%)
	2002	2003	2004		2002	2003	2004	
DEFINDED NATIONAL CITIES + TOWNS 定义的全国城市 + 城镇								
Total FMCG Handlers 所有非耐用消费品销售网点	4,648,616 100%	4,642,355 100%	4,480,940 100%	-3%	36,193 100%	38,459 100%	40,620 100%	6%
Hyper/Supermarkets/CVS 大卖场 / 超市 / 便利店	28,114 0.6%	40,375 0.9%	54,471 1.2%	35%	9,480 26.2%	11,202 29.1%	13,570 33.4%	21%
Grocery + Kiosk 杂货店 + 售货亭	3,247,097 69.9%	3,214,610 69.2%	2,960,426 66.1%	-8%	24,001 66.3%	24,382 63.4%	24,146 59.4%	-1%
Other FMCG Handlers 其他非耐用消费品销售网点	1,373,405 29.5%	1,387,370 29.9%	1,466,043 32.7%	6%	2,713 7.5%	2,876 7.5%	2,904 7.1%	1%

FMCG Retail Market Structure by City & Town
非耐用消费品零售市场结构（按城市 + 城镇划分）

ACNielsen Defined National (City & Town)/AC 尼尔森定义的全国（城市 + 城镇）

	FMCG Store Counts Number of Outlets 售卖非耐用消费品的商店数			Annual Growth 年度增长率 (%)	Monthly FMCG Sales Million RMB 非耐用消费品月销售额（百万元）			Annual Growth 年度增长率 (%)
	2002	2003	2004		2002	2003	2004	
DEFINDED NATIONAL CITIES + TOWNS 定义的全国城市 + 城镇								
Total FMCG Handlers 所有非耐用消费品销售网点	4,648,616 100%	4,642,355 100%	4,480,940 100%	-3%	36,193 100%	38,459 100%	40,620 100%	6%
National City 全国城市	2,460,966 52.9%	2,505,755 54.0%	2,461,346 54.9%	-2%	27,454 75.9%	29,415 76.5%	31,568 77.7%	7%
> A-Cities + BJ/SH/GZ/CD 23个A类城市+北京/上海/广州/成都	645,652 13.9%	665,209 14.3%	663,774 14.8%	0%	12,448 34.4%	13,273 34.5%	14,761 36.3%	11%
>National Other Cities 全国其他城市	1,815,314 39.1%	1,840,546 39.6%	1,797,572 40.1%	-2%	15,006 41.5%	16,141 42.0%	16,807 41.4%	4%
National Town 全国城镇	2,187,650 47.1%	2,136,600 46.0%	2,019,594 45.1%	-5%	8,739 24.1%	9,045 23.5%	9,052 22.3%	0%

Source: ACNielsen Retail Market Study / 资料来源: AC 尼尔森零售普查



FMCG Modern Trade Development by Cities Level
非耐用消费品的现代通路市场结构发展（按城市划分）
ACNielsen Defined National (City & Town)
AC 尼尔森定义的全国（城市 + 城镇）

	FMCG Store Counts Number of Outlets 售卖非耐用消费品的商店总数			Annual Growth 年度增长率	Monthly FMCG Sales Million RMB 非耐用消费品月销售额（百万元）			Annual Growth 年度增长率
	2002	2003	2004	%	2002	2003	2004	%
Total NATIONAL CITIES+TOWNS 定义的全国城市 + 城镇								
-Total Modern Trade 整体现代通路	28,114 100%	40,375 100%	54,471 100%	35%	9,480 100%	11,202 100%	13,570 100%	21%
- Cities - Modern Trade 整体城市 - 现代通路	21,722 100%	30,973 100%	39,436 100%	27%	8,869 100%	10,351 100%	12,659 100%	22%
>23 A - Cities - Modern Trade 整体 23 个 A 类城市 - 现代通路	5,788 20.6%	8,144 20.2%	10,569 19.4%	-1%	3,119 32.9%	3,618 32.3%	4,109 30.3%	14%
>Beijing - Modern Trade 北京 - 现代通路	940 3.3%	1,723 4.3%	2,336 4.3%	36%	1,002 10.6%	1,150 10.3%	1,289 9.5%	12%
>Shanghai - Modern Trade 上海 - 现代通路	3,576 12.7%	5,036 12.5%	5,746 10.5%	14%	1,301 13.7%	1,499 13.4%	1,983 14.6%	32%
>Guangzhou - Modern Trade 广州 - 现代通路	499 1.8%	712 1.8%	909 1.7%	28%	335 3.5%	395 3.5%	645 4.8%	63%
>Chengdu - Modern Trade 成都 - 现代通路	455 1.6%	581 1.4%	1,228 2.3%	111%	164 1.7%	182 1.6%	334 2.5%	84%
>Other Cities - Modern Trade 其他整体城市 - 现代通路	10,464 37.2%	14,778 36.6%	18,649 34.2%	26%	2,948 31.1%	3,507 31.3%	4,299 31.7%	23%
-Town - Modern Trade 城镇 - 现代通路	6392 22.7%	9402 23.3%	15036 27.6%	60%	610 6.4%	851 7.6%	911 6.7%	7%



FMCG Modern Trade Development by Store Size
非耐用消费品的现代通路市场结构发展（按商店规模划分）
ACNielsen Defined National (City & Town)
AC 尼尔森定义的全国（城市 + 城镇）

	FMCG Store Counts Number of Outlets 售卖非耐用消费品的商店数			Annual Growth 年度增长率 %	Monthly FMCG Sales Million RMB 非耐用消费品月销售额（百万元）			Annual Growth 年度增长率 %
	2002	2003	2004		2002	2003	2004	
NATIONAL CITIES+TOWNS 全国城市 + 城镇								
-Total Modern Trade 整体现代通路	28,114 100%	40,375 100%	54,471 100%	35%	9,480 100%	11,202 100%	13,570 100%	21%
>Hypermarkets 大卖场	726 2.6%	855 2.1%	1,175 2.2%	37%	3,139 33.1%	3,525 31.5%	4,446 32.8%	26%
>Supermarkets 超市	1,848 6.6%	2,355 5.8%	3,297 6.1%	40%	1,685 17.8%	2,001 17.9%	2,336 17.2%	17%
Mini Markets (1000 - sq.m.) 小型超市 (1000 - 平方米)	21,800 77.5%	24,693 61.2%	30,755 56.5%	25%	4,334 45.7%	4,646 41.5%	5,492 40.5%	18%
>Convenience Stores 便利店	3,739 13.3%	12,472 30.9%	19,244 35.3%	54%	323 3.4%	1,029 9.2%	1,296 9.6%	26%



FMCG Modern Trade Development by Store Size
非耐用消费品的现代通路市场结构发展（按商店规模划分）
ACNielsen Defined A - Cities
AC 尼尔森定义的 A 类城市

	FMCG Store Counts Number of Outlets 售卖非耐用消费品的商店数			Annual Growth 年度增长率 %	Monthly FMCG Sales Million RMB 非耐用消费品月销售额 (百万元)			Annual Growth 年度增长率 %
	2002	2003	2004		2002	2003	2004	
DEFINED NATIONAL - A CITIES 定义的全国 A 类城市								
-Total Modern Trade 整体现代通路	5,788 100%	8,144 100%	10,569 100%	30%	3,119 100%	3,618 100%	4,109 100%	14%
>Hypermarkets 大卖场	348 6.0%	433 5.3%	544 5.1%	26%	1,532 49.1%	1,728 47.8%	2,026 49.3%	17%
>Supermarkets 超市	608 10.5%	630 7.7%	846 8.0%	34%	523 16.8%	553 15.3%	574 14.0%	4%
Mini Markets (1000 - sq.m.) 小型超市 (1000 - 平方米)	4,368 75.5%	5,726 70.3%	6,947 65.7%	21%	1,025 32.9%	1,237 34.2%	1,351 32.9%	9%
>Convenience Stores 便利店	464 8.0%	1,355 16.6%	2,222 21.0%	64%	38 1.2%	100 2.8%	158 3.8%	58%



FMCG Tradition Trade Development by Cities Level
非耐用消费品的传统通路市场结构发展 (按城市划分)
ACNielsen Defined National (City & Town)
AC 尼尔森定义的全国 (城市 + 城镇)

	FMCG Store Counts Number of Outlets 售卖非耐用消费品的商店数			Annual Growth 年度增长率 %	Monthly FMCG Sales Million RMB 非耐用消费品月销售额 (百万元)			Annual Growth 年度增长率 %
	2002	2003	2004		2002	2003	2004	
Total NATIONAL CITIES+TOWNS 定义的全国城市 + 城镇								
- Total Tradition Trade 整体传统通路	4,620,502 100%	4,601,980 100%	4,426,469 100%	-4%	26,714 100%	27,258 100%	27,257 100%	0%
- Cities - Tradition Trade 整体城市 - 传统通路	2,439,244 52.8%	2,474,782 53.8%	2,421,910 54.7%	-2%	18,585 69.6%	19,064 69.9%	18,909 69.4%	-1%
>23 A - Cities - Tradition Trade 整体 23 个 A 类城市 - 传统通路	433,402 9.4%	443,655 9.6%	434,935 9.8%	-2%	4,405 16.5%	4,398 16.1%	4,378 16.1%	0%
>Beijing - Tradition Trade 北京 - 传统通路	51,577 1.1%	54,31 1.2%	55,154 1.2%	2%	531 2.0%	495 1.8%	490 1.8%	-1%
>Shanghai - Tradition Trade 上海 - 传统通路	62,903 1.4%	62,350 1.4%	63,682 1.4%	2%	857 3.2%	799 2.9%	794 2.9%	-1%
>Guangzhou - Tradition Trade 广州 - 传统通路	62,370 1.3%	62,197 1.4%	62,322 1.4%	0%	435 1.6%	426 1.6%	426 1.6%	0%
>Chengdu - Tradition Trade 成都 - 传统通路	24,142 0.5%	26,499 0.6%	26,895 0.6%	1%	300 1.1%	311 1.1%	312 1.1%	0%
>Other Cities - Tradition Trade 其他整体城市 - 传统通路	1,804,850 39.1%	1,825,769 39.7%	1,778,923 40.2%	-3%	12,058 45.1%	12,634 46.3%	12,509 45.9%	-1%
-Town - Tradition Trade 城镇 - 传统通路	2,181,259 47.2%	2,127,198 46.2%	2,004,558 45.3%	-6%	8,129 30.4%	8,194 30.1%	8,141 29.9%	-1%



FMCG Modern Trade Development by Shop Type

非耐用消费品零售市场结构（按商店类型划分）

4 Key Cities - Beijing, Shanghai, Guangzhou, and Chengdu

4 个重点城市 - 北京, 上海, 广州和成都

		FMCG Store Counts				Annual Growth	Monthly FMCG Sales			Annual Growth
		Number of Outlets					Million RMB			
		2002	2003	2004		(%)	2002	2003	2004	(%)
		售卖非耐用消费品的商店数				年度增长率	非耐用消费品月销售额 (百万元)			年度增长率
BEIJING	北京	52,517	56,036	57,489	3%	1,532	1,644	1,779	8%	
-BJ Hyper market	- 北京卖场	63	64	67	5%	363	366	336	-8%	
-BJ Supermarket/CVS	- 北京超市 / 便利店	877	1,659	2,269	89%	639	783	953	23%	
-BJ Grocery/Kiosk	- 北京杂货店 / 售货亭	37,574	35,214	31,007	-12%	504	460	455	-1%	
-BJ Others	- 北京其他类型商店	14,003	19,099	24,147	26%	26	35	35	0%	
SHANGHAI	上海	66,479	67,386	69,427	3%	2,159	2,298	2,777	21%	
-SH Hyper market	- 上海卖场	73	93	104	12%	584	681	827	21%	
-SH Supermarket/CVS	- 上海超市 / 便利店	3,503	4,943	5,642	14%	718	818	1,156	41%	
-SH Grocery/Kiosk	- 上海杂货店 / 售货亭	49,471	43,250	39,448	-9%	825	755	749	-1%	
-SH Others	- 上海其他类型商店	13,432	19,100	24,234	27%	32	44	45	2%	
GUANGZHOU	广州	62,940	62,952	63,231	0%	770	821	1,071	30%	
-GZ Hyper market	- 广州卖场	10	15	36	140%	75	102	238	133%	
-GZ Supermarket/CVS	- 广州超市 / 便利店	489	697	872	25%	260	293	406	39%	
-GZ Grocery/Kiosk	- 广州杂货店 / 售货亭	47,412	44,172	40,928	-7%	407	393	392	0%	
-GZ Others	- 广州其他类型商店	14,958	18,025	21,394	19%	28	33	34	3%	
CHENGDU	成都	24,594	27,080	28,122	4%	463	494	646	31%	
-CD Hyper market	- 成都卖场	20	27	31	15%	86	110	204	85%	
-CD Supermarket/CVS	- 成都超市 / 便利店	435	554	1,197	116%	78	72	130	81%	
-CD Grocery/Kiosk	- 成都杂货店 / 售货亭	18,175	19,133	18,465	-3%	285	294	295	0%	
-CD Others	- 成都其他类型商店	5,967	7,366	8,430	14%	15	17	18	6%	



Sales Composition (%) in Modern Trade

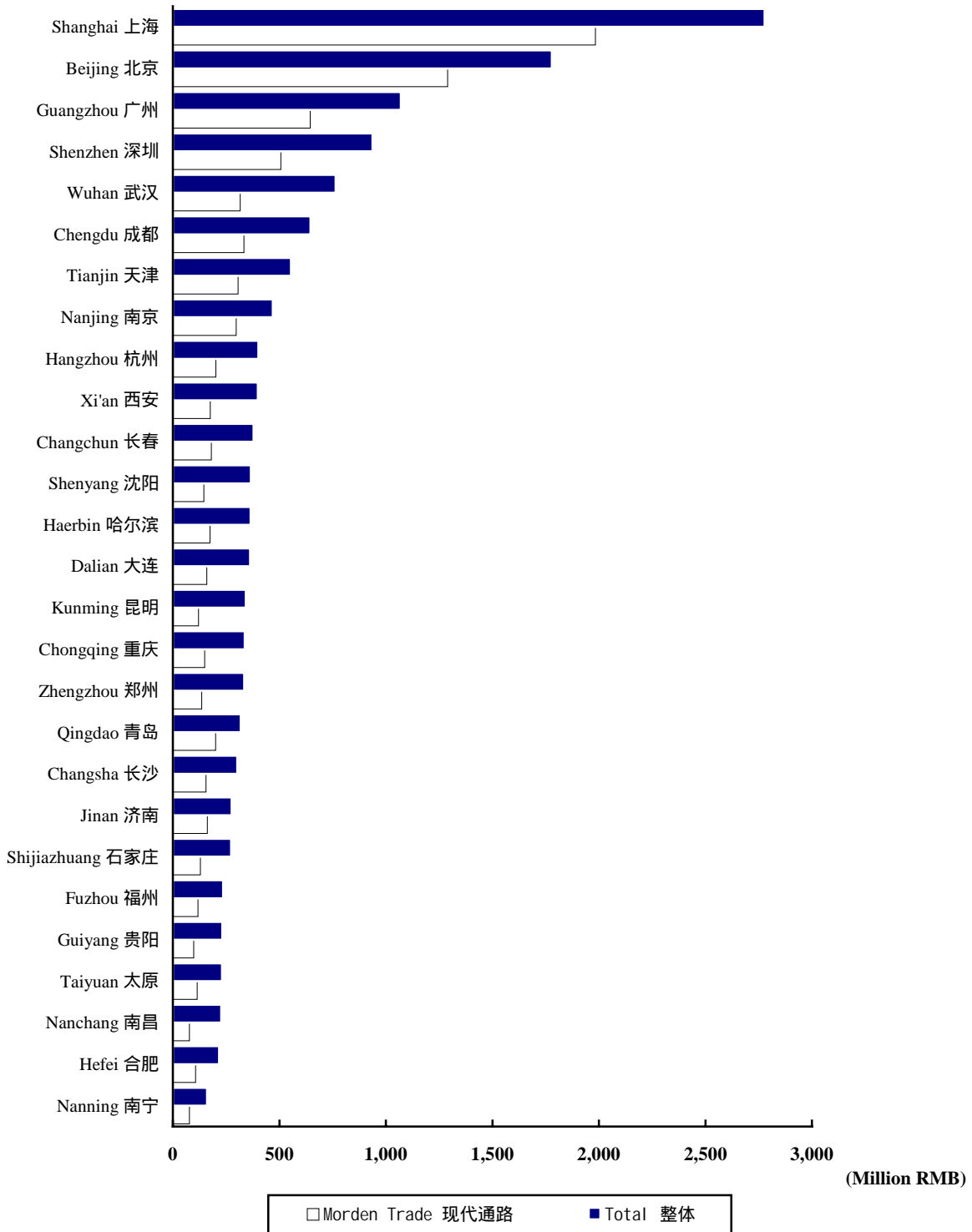
4 个重点城市和 23 个 A 类城市现代通路中非耐用消费品的销售额比重

Morden Trade ACV Importance 现代通路非耐用消费品的销售额比重

CITY 城市	2002 (%)	2003 (%)	2004 (%)
Beijing 北京	65.4	69.9	72.5
Shanghai 上海	60.3	65.2	71.4
Nanjing 南京	46.8	51.6	63.4
Qingdao 青岛	61.3	62.8	62.8
Guangzhou 广州	43.5	48.1	60.2
Jinan 济南	55.5	52.5	58.7
Tianjin 天津	55.4	59.9	55.1
Shenzhen 深圳	42.2	45.1	54.2
Chengdu 成都	35.4	36.8	51.7
Changsha 长沙	39.8	44.1	51.4
Hangzhou 杭州	49.4	53.4	50.1
Fuzhou 福州	38.6	44.0	50.1
Taiyuan 太原	46.7	50.7	49.6
Hefei 合肥	37.1	39.5	49.1
Nanning 南宁	47.8	49.3	48.5
Haerbin 哈尔滨	41.6	43.3	47.9
Changchun 长春	43.6	46.7	47.6
Shijiazhuang 石家庄	37.5	41.3	47.4
Chongqing 重庆	35.2	40.4	44.3
Xian 西安	36.0	40.7	44.0
Dalian 大连	41.5	45.2	44.0
Guiyang 贵阳	29.3	33.8	42.3
Wuhan 武汉	31.3	34.3	41.4
Zhengzhou 郑州	27.4	37.1	40.3
Shenyang 沈阳	40.1	44.7	39.7
Kunming 昆明	31.4	34.0	35.1
Nanchang 南昌	39.3	41.1	34.2



FMCG All-Commodity Value (ACV) by 4 key cities + 23 "A" Cities in China
中国 4 个重点城市和 23 个 "A" 类城市非耐用消费品的销售额

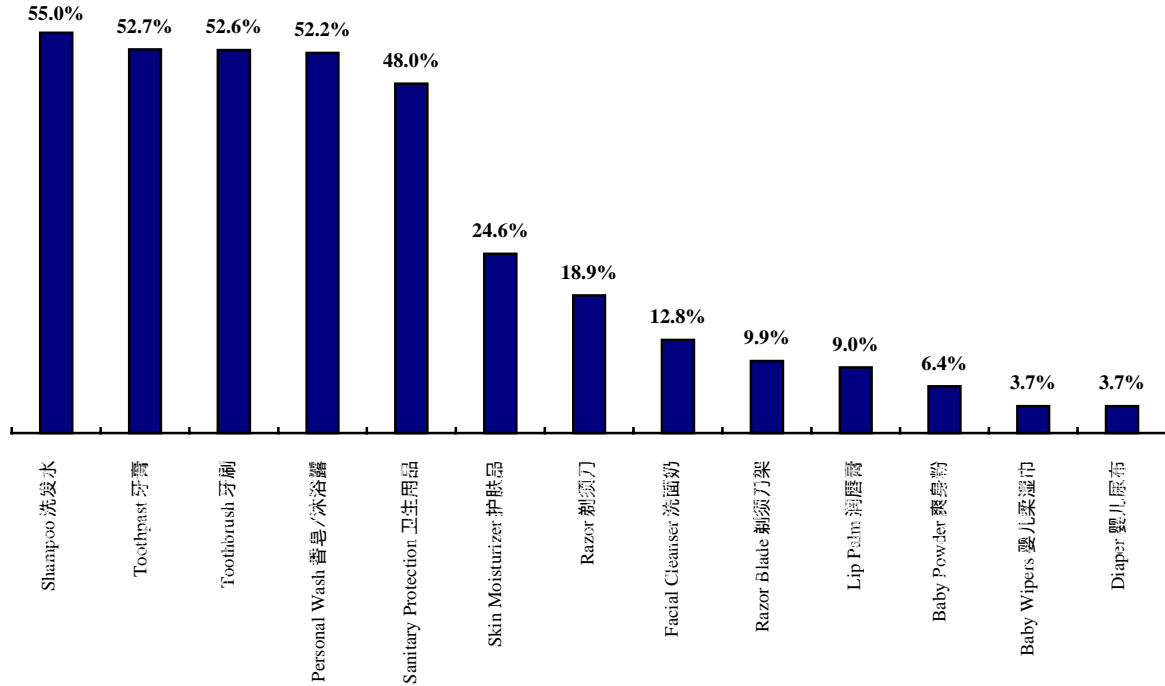


Source: ACNielsen Retail Market Study | 资料来源: AC 尼尔森零售普查

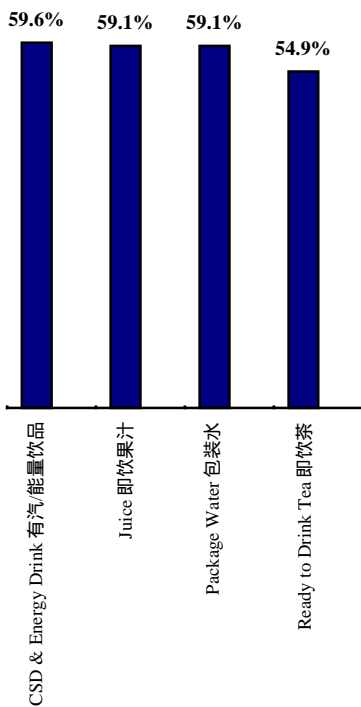


Category Penetration based on 4 key cities + 23 "A" cities (2004)
4 个重点城市和 23 个 "A" 类城市品类渗透 (2004)

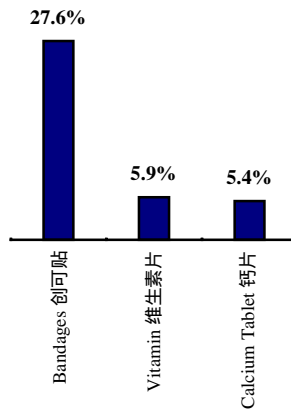
Personal Care (个人护理产品)



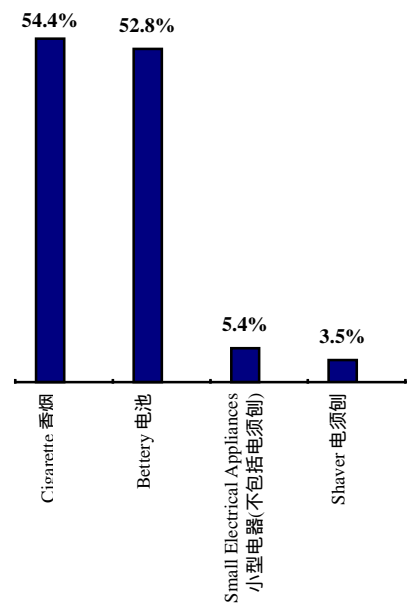
Soft drink (饮料)



OTC (药品)



Others (其他用品)

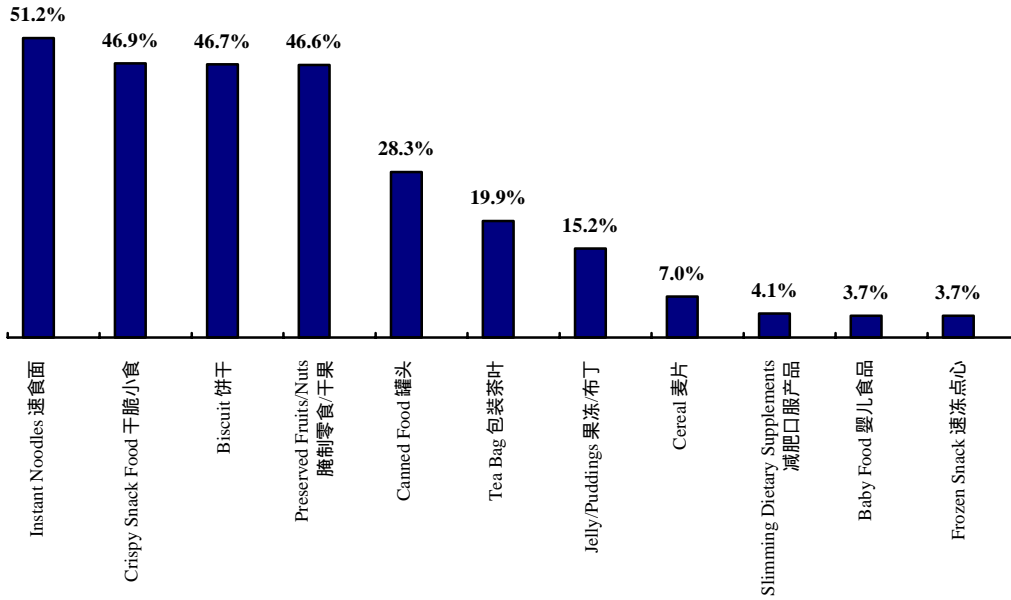


Source: ACNielsen Retail Market Study | 资料来源: AC 尼尔森零售普查

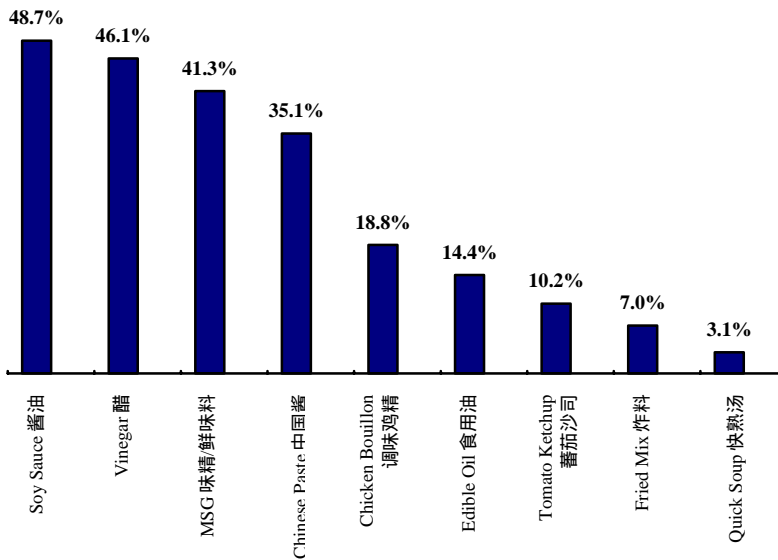


Category Penetration based on 4 key cities + 23 "A" cities (2004)
4 个重点城市和 23 个 "A" 类城市品类渗透 (2004)

Food (食品)



Cooking (烹调产品)

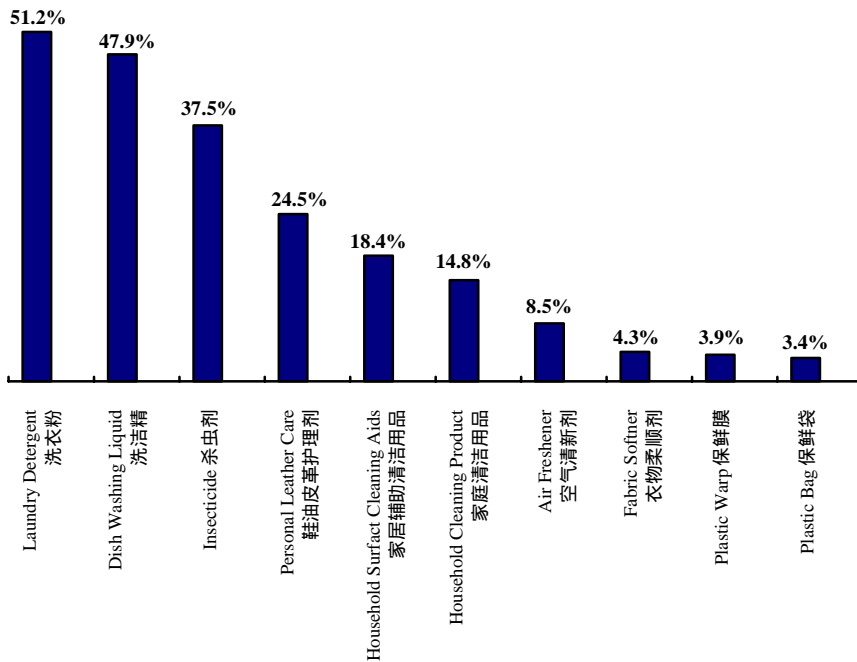


Source: ACNielsen Retail Market Study | 资料来源: AC 尼尔森零售普查

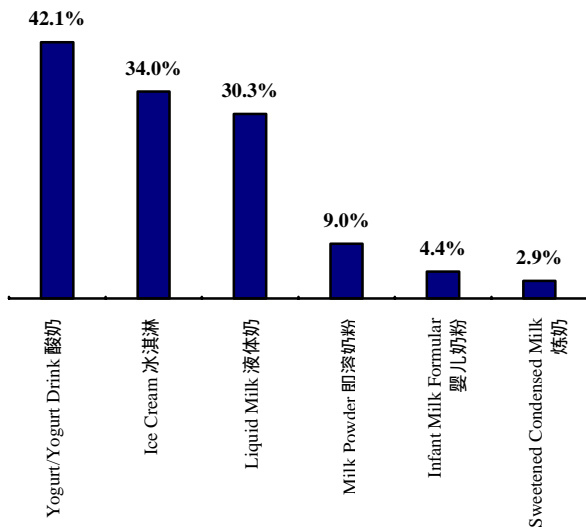


Category Penetration based on 4 key cities + 23 "A" cities (2004)
4 个重点城市和 23 个 "A" 类城市品类渗透 (2004)

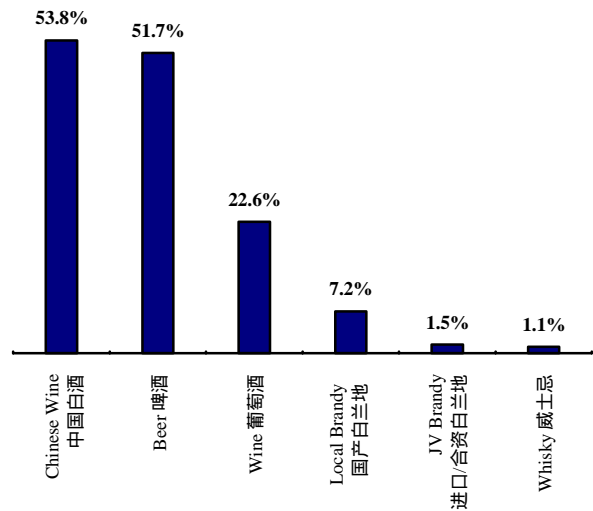
Household Cleaning (家庭卫生用品)



Dairy (奶制品)



Alcohol Drink (酒精类饮品)



Source: ACNielsen Retail Market Study | 资料来源: AC 尼尔森零售普查