

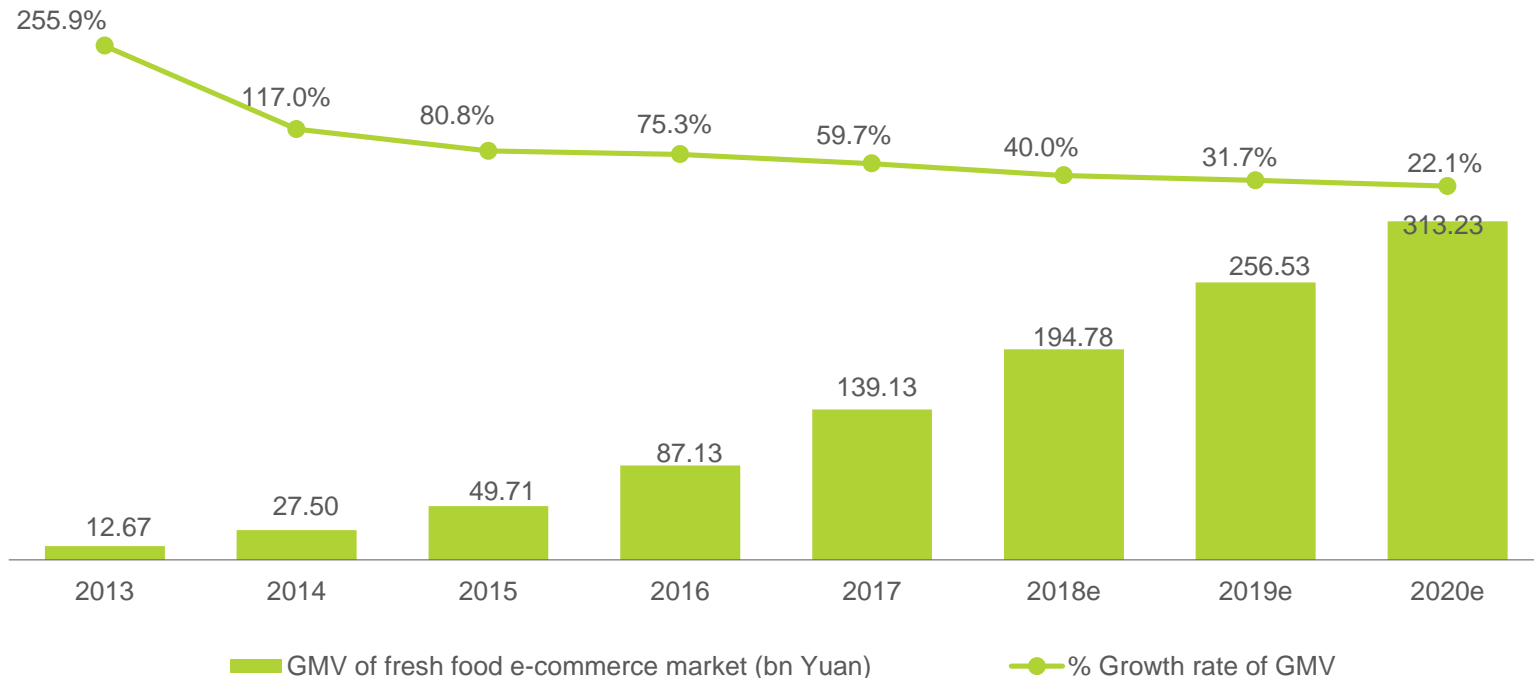
2018 China's Fresh Food E-commerce Consumption Report



Rapid GMV Growth of Fresh Food E-commerce

Fresh food e-commerce market in China keeps growing rapidly at a rate of over 50% annually. In 2016 and 2017, the market was reshuffled and many medium and small-sized fresh food e-commerce companies were closed down or acquired, indicating a cooling market. However, as Alibaba, JD and other e-commerce giants are entering the sector and are raising their investment in supply chain, logistics and other infrastructure. And with the innovative models of these new entrants, the fresh food e-commerce market will be revitalized. In 2017, GMV of fresh food e-commerce market approximated 139.13 billion Yuan, soaring 59.7% compared with 2016.

GMV of Fresh Food E-commerce Market in China 2013-2020e



Note: The statistical caliber is online fresh food GMV. Of the companies, Hema Fresh has both online and offline businesses, and only its online transaction part is included here.
Source: Source: The data are calculated based on the financial results published by related enterprises and interviews with experts in iResearch statistical forecast model.

Industrial Chain of Fresh Food E-commerce

Industrial Chain of China's Fresh Food E-commerce in 2017



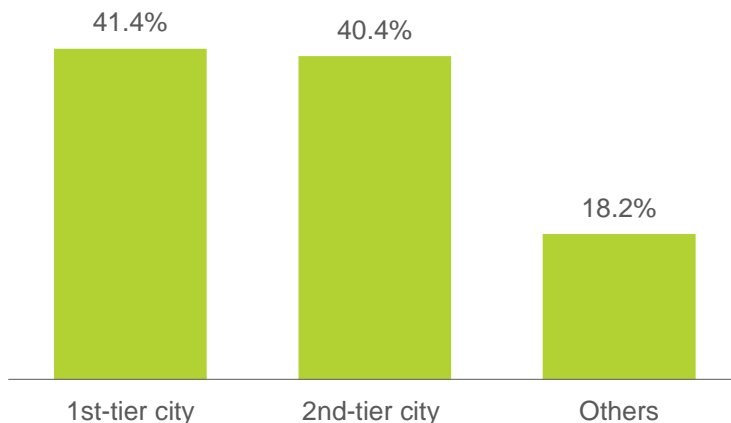
Note: All the company logos are not included in the graphic.

Source: Source: The data are calculated based on the financial results published by related enterprises and interviews with experts in iResearch statistical forecast model.

Fresh Food Online Shoppers Concentrate in First- and Second-tier Cities

Cold chain is a key factor influencing the development of fresh food e-commerce. In China, due to late start, consumer market cold chain logistics mainly covers the first- and second-tier cities, and fresh food online shoppers are mainly in 1st and 2nd-tier cities. According to research data, 41.4% of the fresh food online shoppers in China are in 1st-tier cities, and 40.4% of them are in 2nd-tier cities. Beijing, Shanghai, Guangzhou and Shenzhen have the largest number of fresh food online shoppers. In addition, relying on its logistics advantage, Jingdong (JD) keeps developing market beyond 1st and 2nd-tier cities. Its operation data show that during Jan.-Nov. 2017, sales volume of JD Fresh Goods grew the fastest in 3rd-tier cities at a rate of almost 400% YoY.

Regional Distribution of China's Fresh Food Online Shoppers in 2017



TOP10 Provinces by Sales Volume of JD Fresh Goods in 2017



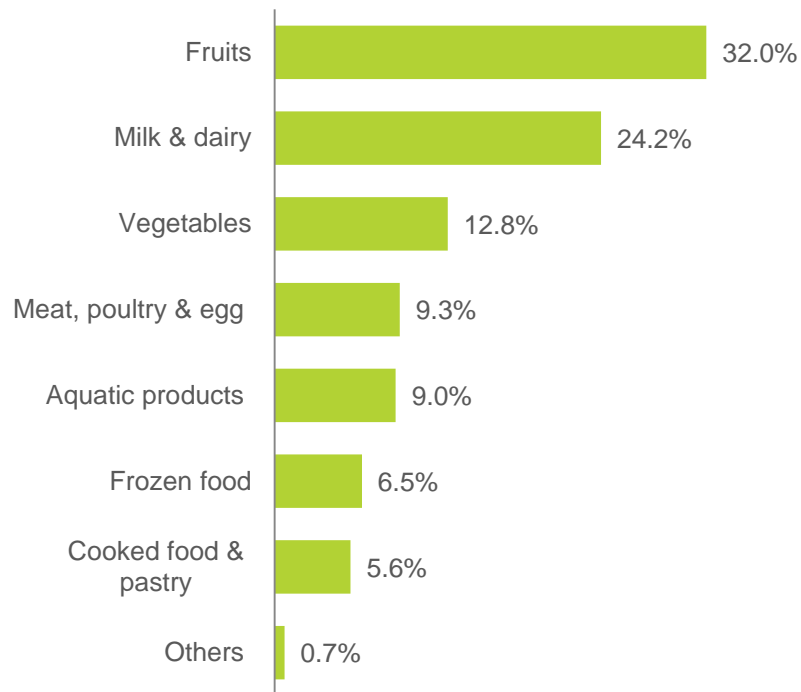
Source: Y8. Which city are you in?
Sample: N=1,507. It is based on iClick online survey in Nov. 2017.

Source: JD official operation data during Jan-Nov 2017, iResearch Consulting Group

Fruits Are The Most Popular Fresh Food Product Among Online Shoppers

Among the fresh food online shoppers, fruits are the most popular product and are bought by 32.0% of the shoppers, followed by milk & dairy products and vegetables. According to operation data of JD, fruits also have the highest sales volume. Besides fruits, the aquatic products & seafood and frozen food are also competitive products of JD Fresh Goods.

Products Most Frequently Bought by Fresh Food Online Shoppers in China in 2017



Top3 Products of JD Fresh Goods by Sales Volume in 2017



Top3 Products of JD Fresh Goods by Buying Frequency 2017



Source: A4. Which of the following fresh food did you buy online last year? What did you buy most frequently?
Sample: N=1,507. It is based on iClick online survey in Nov. 2017.

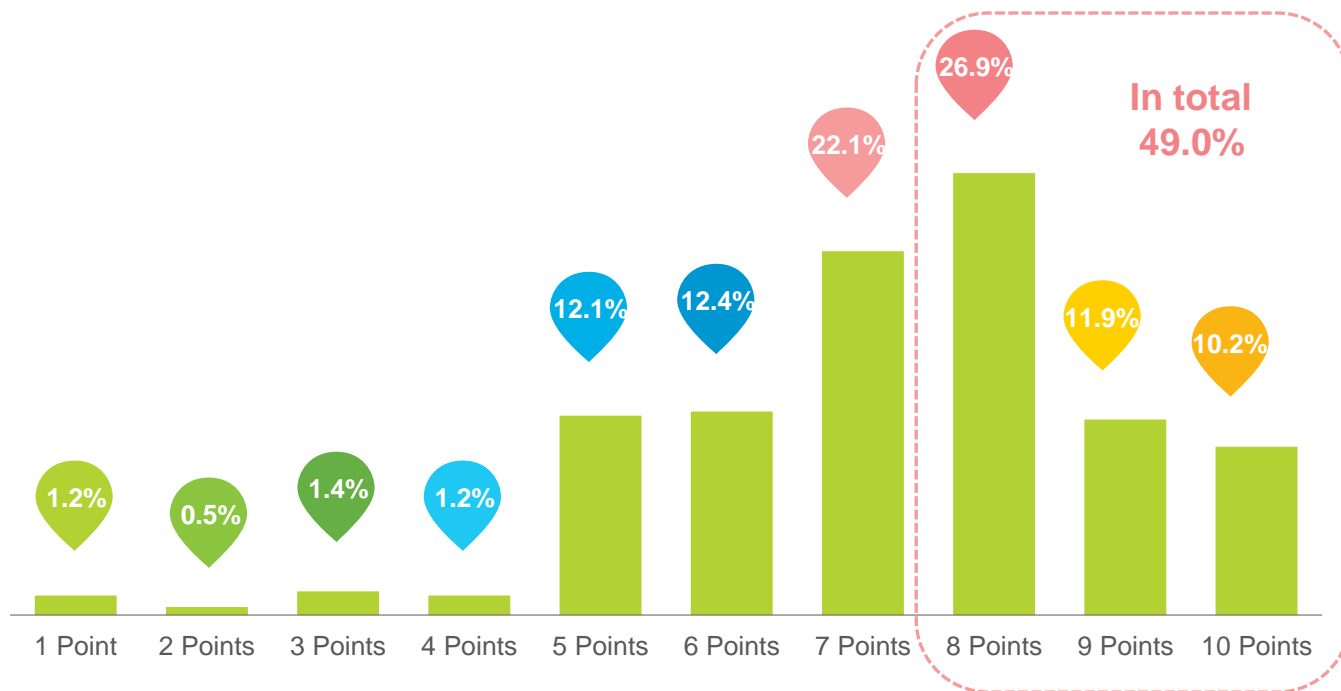
Source: JD official operation data during Jan-Nov 2017, iResearch Consulting Group

Potential Users Are Willing to Try Innovative Models

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Among the users who have not used the innovative models, the average rating of their willingness to try these models is 7.3 points. The rating of willingness of almost half of the users (49.0%) is 8 points or above, and rating of 11.9% of users is 9 points, indicating that users are willing to try new models.

Potential Users' Willingness to Try Innovative Models in 2017



Source: B9. How about your willingness to try innovative model platforms (Hema Fresh, Super Species, etc.) when buying fresh food? Please rate your willingness from 1 point for very unwilling and 10 for willing.

Sample: N=1,507. It is based on iClick online survey in Nov. 2017.

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Founded in 2002, iResearch is the first third-party firm focusing on research in China's internet sector. Since its inception, it has published thousands of industry reports and provided custom research and consulting services to thousands of clients. It is now the preferred third-party research brand for the IPO of Chinese internet companies. iResearch set up its global research center in 2015, expanding the scope of research to fast-growing sectors world-wide.

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