把脉中国零售的律动

用最全面的数据和洞察系统洞见**快速消费品零售市场结构变革**，掌握下一个5年的制胜风口

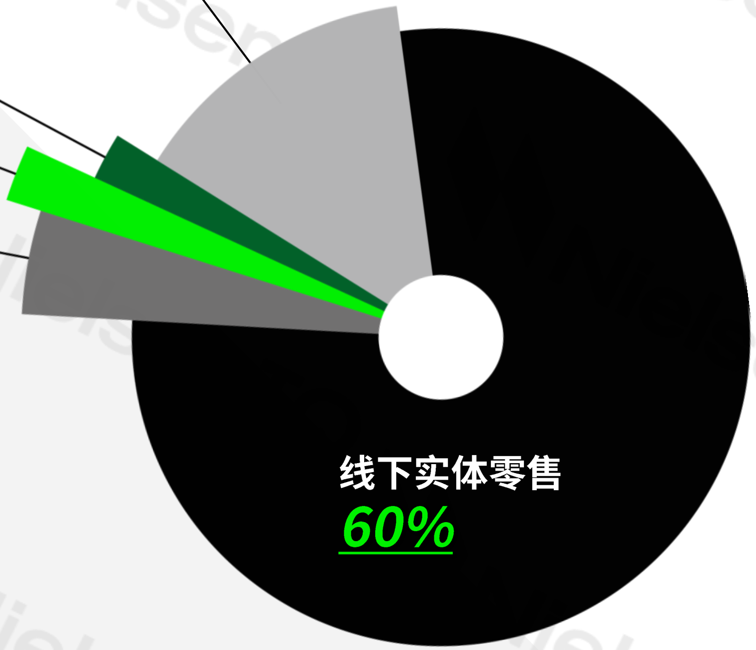
尼尔森IQ中国零售监测渠道定义重塑计划 2023

系列分享：第一期

NielsenIQ

线下实体零售是中流砥柱，但需升级并重获增长动力

今日中国快消品零售渠道结构

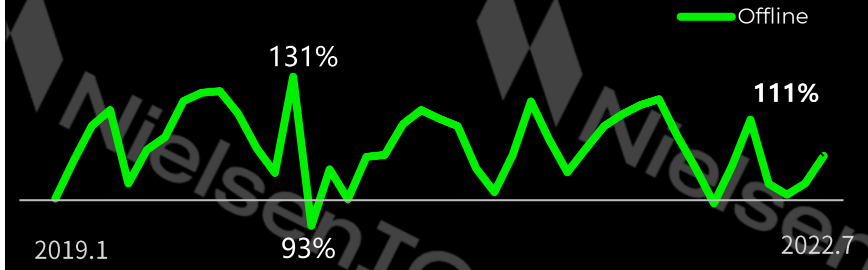


数据来源: 尼尔森IQ电商解码2021, 尼尔森IQ零售基础研究

社媒/内容电商：抖音, 快手, 得物，小红书；O2O-新零售：美团，饿了么，京东到家，盒马等
微信小程序：主流品牌与零售商小程序

线下实体零售的韧性…

实体零售的体量变化 (2019年1月：100)



Index: MOM sales / sales 2019.1

实体零售渠道销售占比

29% 现代渠道

23% 传统渠道

2%,+51% O2O渠道 (占比及增幅)

中国消费者追求更多选择，更便捷，更好的零售消费体验

新冠疫情前我们开始观察到

近场消费

小型化、近场渠道的重要性凸显

高端超市

能更好的体验、以及更多的进口商品选择

新兴电商

更多新兴电商、社交即时购物的体验

现在我们洞察到…

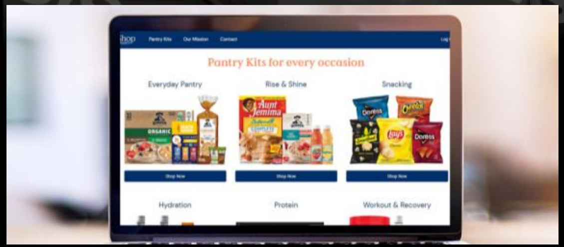
O2O近场购物体验、以及供应链的配送支持变得更重要

更多社区店、前置仓支持的O2O体验

更有效的产品选择（生鲜品类、自有品牌、新消费品牌)；更丰富的购物体验（方便快捷，场景化体验，环境舒适）

生鲜品类向下渗透，实体零售全面回归

跨平台(虚拟和实体)的价格及产品对比



全渠道的互动

供给端和需求端的变化驱动渠道重塑，应时而变

现代通路
- 大卖场
- 大型超市
- 小型超市
- 便利店

食杂通路
- 自选式食杂店
- 非自选式食杂店

供给端

- 移动互联网**技术革新**
- 商品**供应链**完善
- **物流配送**服务发展

渠道重塑

需求端

- **近场化/便捷消费**的需求提升
- 商品价值感，**品质化**要求提高
- 购物追求**体验感**，场景化

规模效应
品质保证
产品优势
服务优势

近场优势
情感优势
迭代升级
数字赋能

现代通路
- 连锁型现代通路店铺*
- 非连锁大型超市

- 非连锁小型超市
- 大型食杂店

食杂通路
- 中小型食杂店

*连锁现代通路包含：大卖场、连锁大型超市、连锁小型超市、便利店

现代连锁通路的机遇：中小型业态引领现代连锁的逆袭增长

大卖场发展收缩，便利店、小型连锁超市、连锁超市引领现代连锁通路整体增长，其中便利店和连锁超市脱颖而出

大型业态

大卖场

-3.7%

连锁大型超市

+14.3%

中小型业态

便利店

+22.3%

连锁小型超市

+0.2%

零售商转型

> 头部零售商从2019年开始转向新开更多中小型业态门店；加大O2O投入力度，多渠道融合发展。

政策支持

> 商务部在2021年出台政策促进“15分钟生活圈”建设，赋能及加快近场零售商业和低线城市零售市场发展。

消费需求

>购物便利和服务体验成为所有购买偏好中消费者优先考虑的因素，消费需求的贴合有利于中小型和社区形式的零售业态发展。

数据来源：尼尔森IQ零研基础研究2021，门店数量增长率为2021 vs 2019

连锁超市的逆袭：强供应链保障生鲜、产品价格优势，提高购物体验

94%

全国范围内，94%的连锁超市销售生鲜产品；在低线城市，生鲜产品在连锁超市的渗透率是92%

供应链赋能门店运营

>连锁企业的集中物流系统有效保证生鲜产品的丰富度和新鲜度

> 45%的消费者愿意去新开的超市购物

> 60%的消费者在选择店铺时受到鲜肉及海鲜产品因素的影响


生鲜区


就餐区

33%

卖场/超市用户的O2O渗透率

低线城市持续渗透

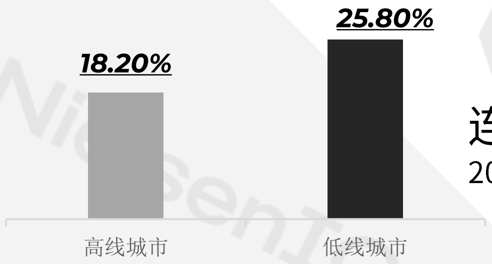
> 连锁超市在上线下线城市均快速发展;生鲜产品在低线城市连锁超市的渗透率由2020年的90%，提升到了2021年的92%。


西部某城市超市

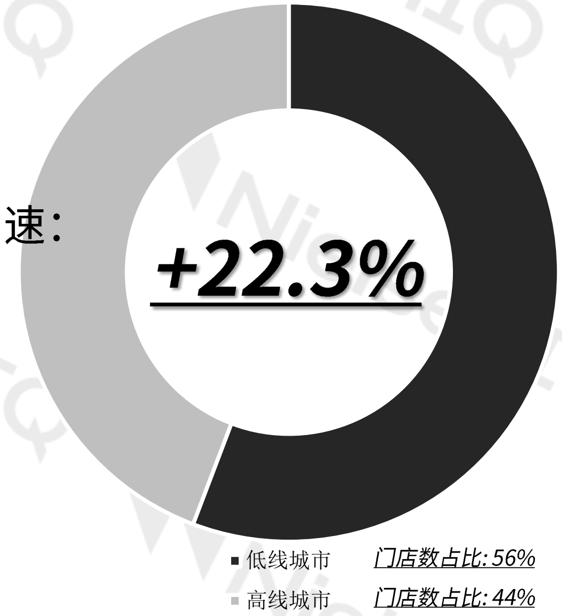

远西某城市超市

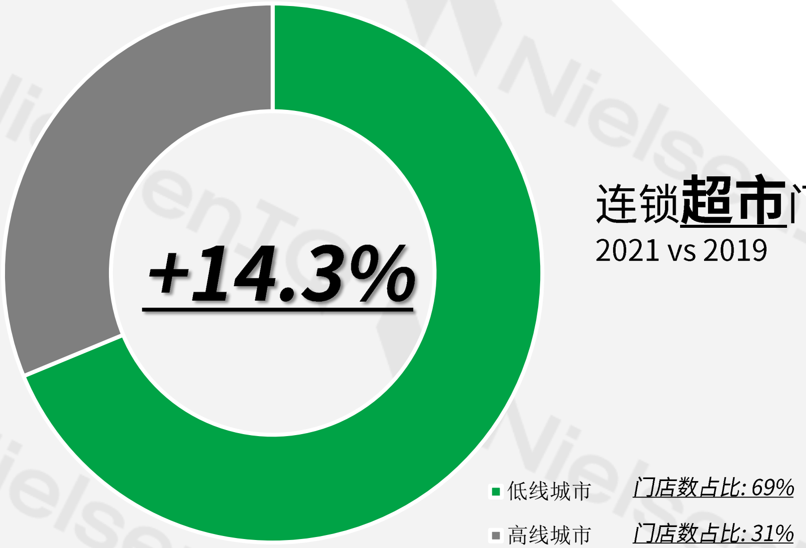
数据来源：尼尔森IQ全国消费者研究2021-2022，受访人群：13063，年龄结构：18-65岁
*上线城市：重点城市 / A类 / B类，下线城市：C类 / D类

现代连锁通路的机遇：中小型连锁业态进一步在高线及低线城市渗透，同步迈进

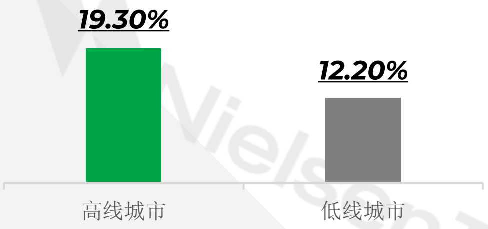


连锁**便利店**门店数量增速：
2021 vs 2019





连锁**超市**门店数量增速：
2021 vs 2019



+24%

2021 vs 2019

连锁超市和便利店在**低线城市**门店数量增速

+18%

2021 vs 2019

连锁超市和便利店在**高线城市**门店数量增速

数据来源：尼尔森IQ零研基础研究2021， 圆环比例代表低线城市和高线城市的门店数量占比
*上线城市: 重点城市 / A类 / B类, 下线城市: C类 / D类

现代化转型中的非连锁店铺：通路界限变得更模糊

设备升级

+24%

E-POS系统在大型食杂店的渗透率从2019年的14%增加到2021年的18%，增速为+24%

90%

2021年，90%的大型杂货店拥有冷藏冷冻设备，2020年为86%

产品丰富度提升

+19%

大型食杂店(m²>40)销售的平均品类数量从2019年的36个增加到2021年的43个，增长了+19%

供应链强化提升

电商巨头(京东、阿里巴巴等) 拓展线下 to B 渠道，促进食杂店售卖的商品种类丰富度，甚至部分网红产品、进口食品等也出现在食杂店渠道。

大型食杂店升级

- ✓ E-POS 更广泛的应用
- ✓ 设备升级
- ✓ 品类丰富度提升
- ✓ 供应链赋能

数据来源：尼尔森IQ零研基础研究2021

现代化转型中的非连锁店铺：满足近场即时消费需求，百万门店的机遇

现代化转型中的小店

非连锁小型超市 (平均面积200m²)

大型食杂店 （平均面积58m²)

+8.0% 2021 vs 2019
大型食杂店门店数量增速

自选式食杂店占比: **100%**
社区类型店铺占比： **77%**

E-POS渗透率: **18%**
平均营业面积: **58 m²**

传统夫妻老婆店

中型食杂店 (平均面积: 26m²)

小型食杂店（平均: 12m²)

+3.0% 2021 vs 2019
中型食杂店门店数量增速

-3.0% 2021 vs 2019
小型食杂店门店数量增速

数据来源：尼尔森IQ零研基础研究2021

现代化转型中的非连锁店铺：集中在沿海及人口密集省份，中西部省份增长速度迅猛

河北，山东，河南，四川，广东门店数量排名**前5位**，占现代化转型中的非连锁店铺总数的**43%**

贵州，云南，江西，山东，广西店铺数量增长排名全国**前5位**

数据来源：尼尔森IQ零研基础研究 2021

我们看到的未来5年的通路“转型”及“现代化”机遇

渠道类型	店铺类型* 店铺数量，增长率% ‘21 vs. 19		未来机遇
现代通路	连锁现代通路店铺 15万，+14%	连锁型现代通路店铺	关键词：强管理的“数字化转型” 推动力 • 利用O2O的时效优势，促进即时消费场景的便利性 • 供应链规模效应，确保生鲜产品质量及价格优势 • 集中化管理有效保证商品及服务质量，提升购物体验 • 长时间服务门店为近场即时性消费提供有效保障
现代通路	非连锁大超市 数量少，增速高		
现代通路	非连锁小型超市 30万，+27%	现代化转型中的非连锁店铺	关键词：强体验的“现代化升级” 推动力 • 商品丰富度升级 • 设备设施升级，促进购物体验 • 更加快捷便利的数字扫码及支付体验 • 供应链赋能优化库存管理，提升运营效率
传统通路	大型食杂店 111万，+8%	现代化转型中的非连锁店铺	
传统通路	中、小型食杂店 数量大，增速低		

* 店铺类型定义将在“尼尔森IQ 中国零售监测渠道定义重塑计划2023”中新增，原有现代通路店铺类型细分(大卖场，大超，小超，便利店)予以保留

尼尔森IQ在中国持续创新，把握零售市场脉搏，及时反应最真实的市场全貌

1984 尼尔森IQ进入中国市场

■ **连锁零售业全面发展**

2009 尼尔森IQ3年滚石计划: 逐步建立对中国零售市场**3百万**家省份级别零售门店的洞察网络

■ **专业化渠道遍地开花**

2010 尼尔森IQ 开始提供40余万家中国**母婴和化妆品专业化渠道**的销售洞察

■ **线上电商全面腾飞**

2013 尼尔森IQ 开始提供中国**电商渠道**的快消品销售洞察

■ **城镇化进程全面推进零售业在乡村市场的发展**

2020 尼尔森IQ 开始提供覆盖城镇及乡村市场近**6百万**家零售门店的营销洞察体系

■ **线上与线下融合**

2022 尼尔森IQ 开始提供线上线下整合渠道**O2O**的销售洞察监测

随着中国零售业持续不断的升级和变革……

尼尔森IQ零售研究体系

重大升级

重塑

线下通路渠道定义

为未来5年找到150万家零售转型及机遇门店

For more insights:

nielseniq.cn/global/zh/insights/

欲获取更多信息，请联系您的尼尔森IQ商业伙伴，
或致信邮箱：inquiry.china@smb.nielseniq.com

About NielsenIQ

Arthur C. Nielsen, who founded Nielsen in 1923, is the original name in consumer intelligence. After decades of helping companies look to the future, we are setting the foundation for our future by becoming NielsenIQ. We continue to be the undisputed industry leaders as evidenced by our experience and unmatched integrity. As we move forward, we are focused on providing the best retail and consumer data platform, enabling better innovation, faster delivery, and bolder decision-making. We are unwavering in our commitment to these ideals and passionate about helping clients achieve success. For more information, visit: nielseniq.cn/global/zh/

CHINA RETAIL HEARTBEAT

Leading ***FMCG channel landscape evolution*** *to capture future growth in the next decades*

Wave 1

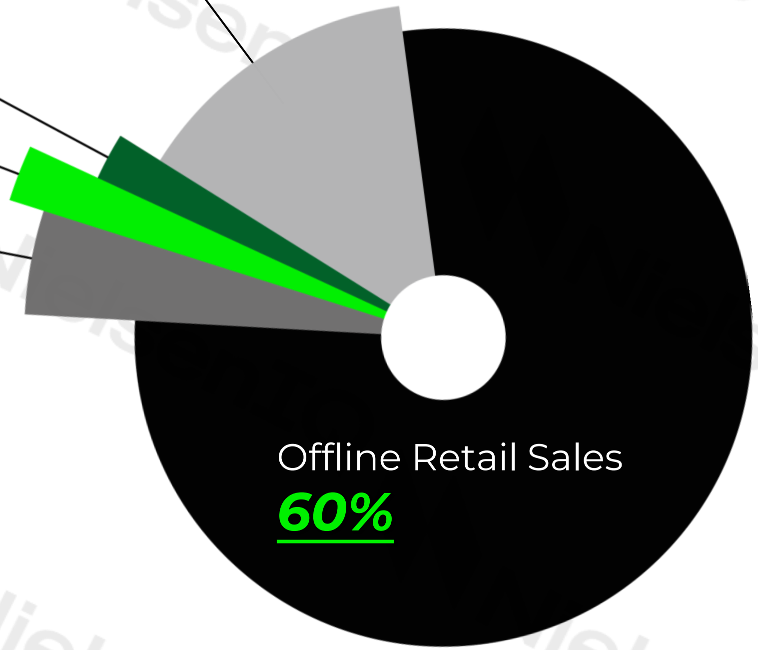
NielsenIQ China

August 2022

NielsenIQ

Retail landscape recovery with diversified channels booming in the new pandemic wave

China FMCG Retail Landscape

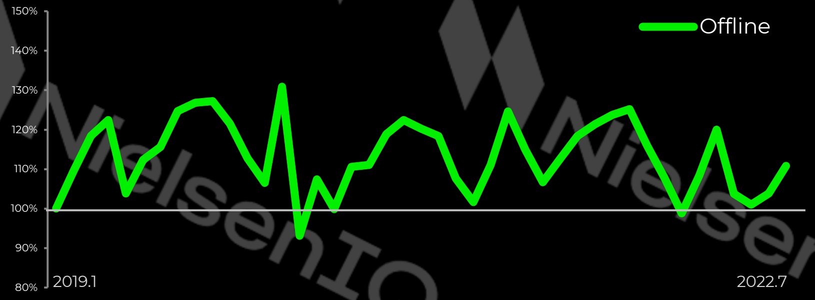


Data Source: NielsenIQ Ecom Discovery, NielsenIQ RMS

Social/Content Ecom : Tiktok, Kuaishou, Dewu, XHS； O2O New Retail: Meituan, ELM, JDDJ, HEMA, Others
Wechat miniprogram : mainly brand/retailer owned

The resilient offline growth…….

Offline Channel Recovery Index



Index: MOM sales / sales 2019.1

Offline Channel Importance

29% Modern Trade

23% Traditional Trade

2%, +51% O2O (Growth)

Chinese consumers want More choices, Quicker and Easier…….

Pre Covid we saw…

Proximity stores

Proximity will still be important

Premium Supermarkets

Better experience, and more choice of imported goods


Emerging eCommerce choices

More new e-commerce, social media shopping experience

Now we see…

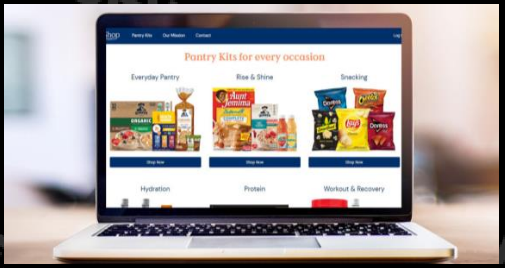
O2O fast delivery experience, supply chain management support becomes even **more** important


More O2O supported by community stores and front warehouses

More effective **product selection** (fresh categories, private brands, emerging consumer brands); **Richer shopping experience** (convenient and fast, better experience & environment)


Fresh penetrates in lower tier cities, driving offline retail recovery

Price and product comparisons across platforms **(virtual and physical)**



Omni-channel interaction

Supply and Demand jointly reshape the channel dynamics

Supply

- Mobile Internet technology innovation
- Supply chain upgrade
- Logistics services empowerment

Modern Trade
- Hypermarket
- Supermarket
- Minimarket
- CVS

Traditional Trade
- Self-service Grocery
- Non-self-service Grocery

Channel Dynamic

Scale advantage
Quality assurance
Product advantage
Service advantage

Neighborhood convenience
Emotional connection
Modernization
Supply chain upgrade

Modern Trade
- Chain Modern Trade*
- Independent Supermarket
- Independent Minimarket

Traditional Trade
- Large Grocery
- Medium & Small Grocery

Demand

- Shopping convenience demand
- Product quality, value for money
- The pursuit of Shopping Experience rises

*Chain Modern Trade：Hypermarket, Chain Supermarket, Chain minimarket, CVS

Chain MT Opportunities: Medium and Small formats led the growth

- CVS, Chain minimarkets and chain supermarkets sailed against the downstream of hypermarkets, leading the total growth of chain MT; among which **CVS and chain Super** outgrew

Large

Hypermarkets

-3.7%

Chain Supermarkets

+14.3%

Medium & Small

CVS

+22.3%

Chain Minimarkets

+0.2%

Retailer Transformation

*> Top retailors turned to open **more medium-small** sized businesses after 2019 and accelerated O2O integration.*

Policy Support

*> MOFCOM issued policies of "**15-mins life circle**" in 2021.07, accelerated the near-field retail commerce and retail development in low tier markets.*

Consumer Demand

*> Shopping **convenience and service experience** become more prior among all buying preferences, benefit the small and neighborhood format retailors.*

*The charts are based on 21UU2 census data from the RES survey, growth rate based on 2021 vs 2019

Chain MT: Strong supply chain system empowered the quality of fresh categories, shopping experience and service advantages

94%

Average Fresh rate in total and chain supermarkets; 92% in Lower tier cities.

33%

O2O penetration rate in Hyper/Supermarket consumers

Chain Logistics empower Fresh Stores

> Chain store centralized logistic system guarantees richness and freshness of fresh products

> 45% consumer would like to go to newly opened supermarkets for shopping

> 60% consumers are impacted by Fresh meat/seafood in store selection

Lower Tier Penetration

> Chain supermarkets store number growth across city tiers in both upper and lower; Fresh penetration achieved 92% in Lower tier cities, 90% in 2020.

Fresh Stores

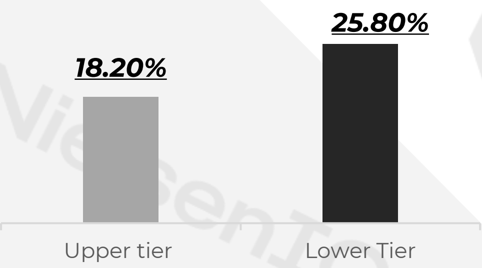
Dine in area

West D city

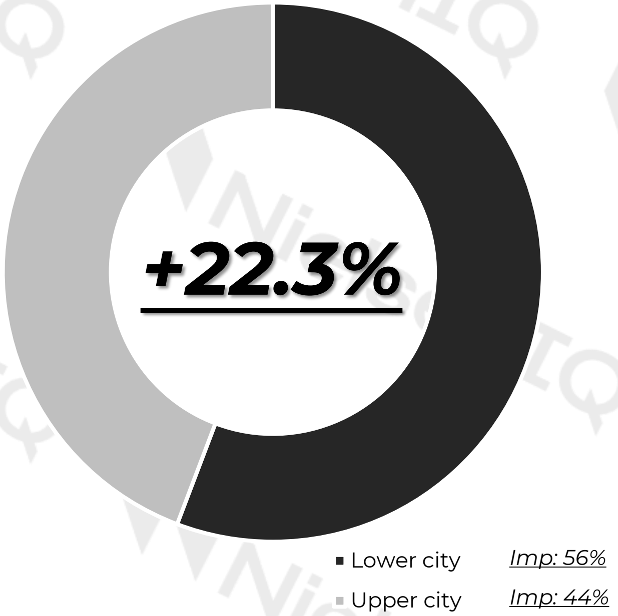
Far West Cities

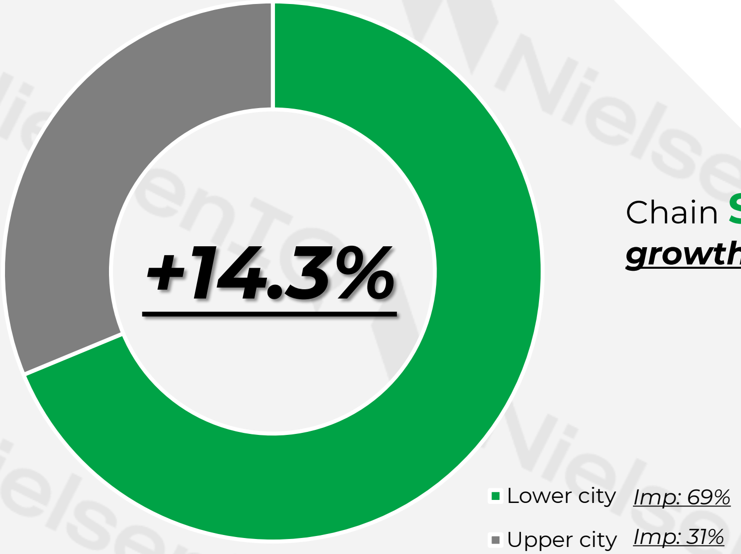
* NielsenIQ consumer survey 2021-2022, sample size 13063, 18-65, China Mainland
** Upper Tier Cities: Key / A / B, Lower Tier Cities: C / D

Chain Supermarket and CVS outperformed with further penetration into lower tier city

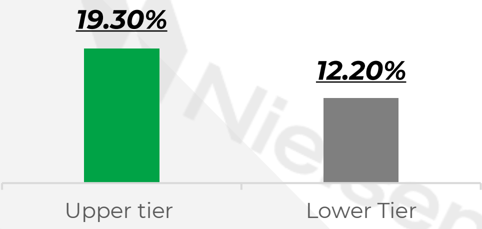


Chain **CVS** store number
growth% 2021 vs 2019





Chain **Supermarket** Store number
growth% 2021 vs 2019



+24%

2021 vs 2019

Chain supermarket and CVS growth by store number in **Lower tier city**

+18%

2021 vs 2019

Chain supermarket and CVS growth by store number in **Upper tier city**

*The charts are based on 21UU2 census data from the RES survey, circle represented the store count number importance upper tier and lower tier cities

Grocery modernization resulted in vaguer boundary between Large Grocery and Independent Minimarket

Equipment upgrade

+24%

The E-POS system penetration in Large grocery stores increased **24%** from **14%** in 2019 to **18%** in 2021.

90%

90% of Large grocery stores have **refrigeration** equipment in 2021, which is **86%** in 2020.

Products variety enrichment

+19%

The average category number selling in large grocery stores(m^2>40) increased 19% from **36** in 2019 to **43** in 2021.

Supply chain enhancement

EC players(JD, Alibaba, etc) explored offline to B channels, which enabled richer assortments, even some **best-selling products online** and high-level **import products**.

Large Grocery Evolution

- ✓ Wider E-POS application
- ✓ Facilities upgrade
- ✓ Richer assortment
- ✓ Supply chain enhancement

Data Source: NielsenIQ Retail Establishment Survey

Modernizing Independent Trade: neighborhood instant consumption demand satisfy, with millions of store opportunities yet to explore

Modernizing Small Shops

Independent minimarket

Large Grocery

+8.0% 2021 vs 2019

Large grocery store# growth

Self-serve Grocery: **100%**

Community type store： **77%**

EPOS penetration: **18%**

Average sales area: **58 m²**

Traditional Grocery

Medium Grocery (avg.area: 26m²)

Small Grocery (avg.area: 12m²)

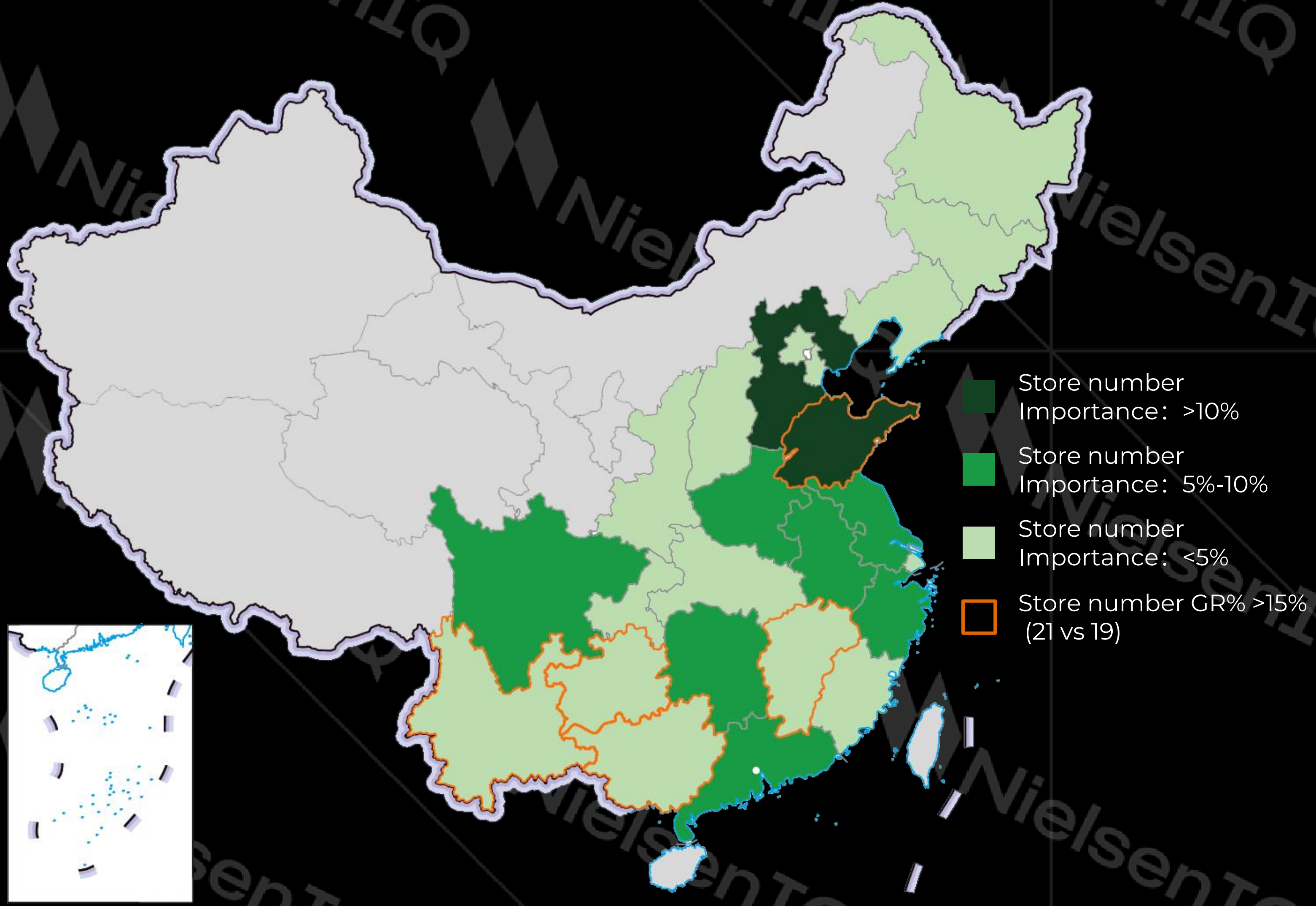
+3.0% 2021 vs 2019

Medium grocery store# growth

-3.0% 2021 vs 2019

Small grocery store# growth

Modernizing Independent Trade: highly concentrated in coastal and populous provinces, faster growth in western provinces



Hebei, Shandong, Henan, Sichuan, Guangdong

rank **top 5** provinces in store numbers, account for **43%** store numbers in total modernizing independent trade.

Guizhou, Yunnan, Jiangxi, Shandong, Guangxi

rank **top 5** store number growth province

Capture the future opportunities of Channel "Transformation" and "Modernization"

Channel Types*

Store number，GR% '21 vs. 19

Modern Trade
- **Chain Modern Trade** 150K，+14% → **Chain Modern Trade**
- **Independent Supermarket** Small quantity, high growth rate
- **Independent Minimarket** 300K, +27% → **Modernizing Ind- -ependent Trade**

Traditional Trade
- **Large Grocery** 1.11M，+8% → **Modernizing Ind- -ependent Trade**
- **Small, Medium Grocery** Large quantity, low growth rate

Future Opportunities

Keyword：Transformation

Drivers
- Leverage O2O to provide proximity and convenience
- Strong supply chain enabled fresh goods and price advantage
- Strong Central management on shopper experience
- Longtime service (16h+) to provide proximity

Keyword： Modernization

Drivers
- Better and diversified assortment
- Shopping Experience & Facilities upgrade
- Digital payment
- Better Supply Chain and OOS management

* The definition of channel sub-types will be added in the "NielsenIQ China Granularity 2 program", and the original channel type segmentation (hypermarket, Supermarket, Minimarket, CVS) will be retained

Three decades of efforts in China

"Continuously evolving measurement scope and granularity to reflect Full Picture of Truth for China retail landscape"

1984 NielsenIQ Enter China

Retail Modernization

2009 Establishing retail measurement panel to reflect 3 million stores retail universe

Specialization

2010 Start to monitor booming 450k Baby & Cosmetics Specialty stores

Ecommerce

2013 Start to cover the booming eCommerce channel

Urbanization

2020 Start to cover China Rural Retail

To reflect close to 6.0 million retail universe

Online to Offline

2022 Start to capture O2O sales

Continuous revolution of retail industry…

NielsenIQ RMS

BIG UPGRADE

Granularity 2 program

1.5million stores explore

to capture the future growth in the next decades

For more insights:

nielseniq.cn

If you have any query, please reach out to your NielsenIQ representatives or drop a message to this email: inquiry.china@smb.nielseniq.com

About NielsenIQ

Arthur C. Nielsen, who founded Nielsen in 1923, is the original name in consumer intelligence. After decades of helping companies look to the future, we are setting the foundation for our future by becoming NielsenIQ. We continue to be the undisputed industry leaders as evidenced by our experience and unmatched integrity. As we move forward, we are focused on providing the best retail and consumer data platform, enabling better innovation, faster delivery, and bolder decision-making. We are unwavering in our commitment to these ideals and passionate about helping clients achieve success. For more information, visit: nielseniq.cn