

超市发展对中国食品供应链的影响

Impact of Supermarket Development on Food Supply Chain in China

--食品供应链的二元结构论--

On the Twain Food Supply Chain in China

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超市将彻底改变中国食品供应链，将是拉动农业,食品加工业和零售业走向全球化的火车头！

Supermarket development would change the structure of food supply chain in China thoroughly, and it will become a locomotive that lead the agricultural and retail sectors and food processing industry toward modernization in China!



超市正在逐渐成为13亿中国人的主要购物场所。

Supermarkets are gradually turning into main shopping place for 1.3 billion population in China.



超市在城市 SMs in Urban area



超市在农村 SMs in rural area



中国超市的发展

Development of supermarket in China

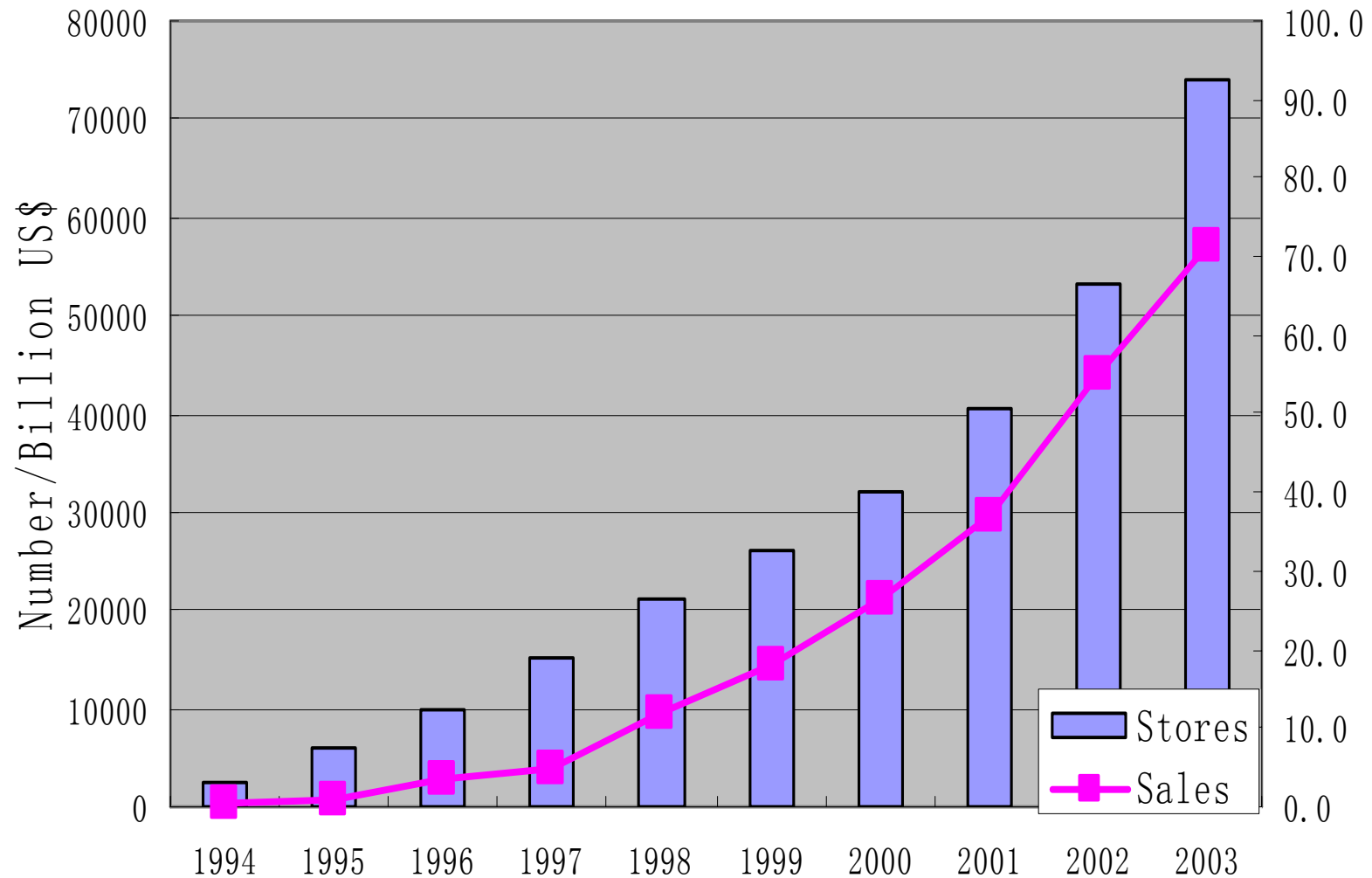
中国超市从1990年开始，到2003年超市门店数达到7.4万个，销售总额711亿美元。

Supermarket started in China in 1990;

- In 2003, there are 74.0 thousand SM stores and total sales at US\$ 71.1 billion.



Development of Spermarket in China



The Proportion of supermarket sales at total retail of consumer goods in 12 cities

City Name	Total Retail (US\$ Billion)	Sales of Supermarket (US\$ Billion)	Proportion of Supermark et (%)	Numbers of Supermarket stores
Shanghai	29.6	11.2	37.7	10220
Beijing	26.4	7.7	29.0	5000
Tianjin	12.7	3.0	23.3	
Chongqing	11.5	2.5	21.9	3000
Qingdao	7.3	2.1	28.7	3785
Shenyang	9.7	2.6	26.7	4000
Wuhan	11.6	3.0	25.9	2350
Suzhou	7.5	1.2	16.2	1093
Ningbo	7.2	1.7	24.0	
Taiyuan	2.7	0.6	20.4	
Hangzhou	8.5	1.5	17.9	1222
Yantai	5.3	0.7	13.9	1400
Harbin	8.5	0.4	4.7	253

超市在中国快速发展的主要原因

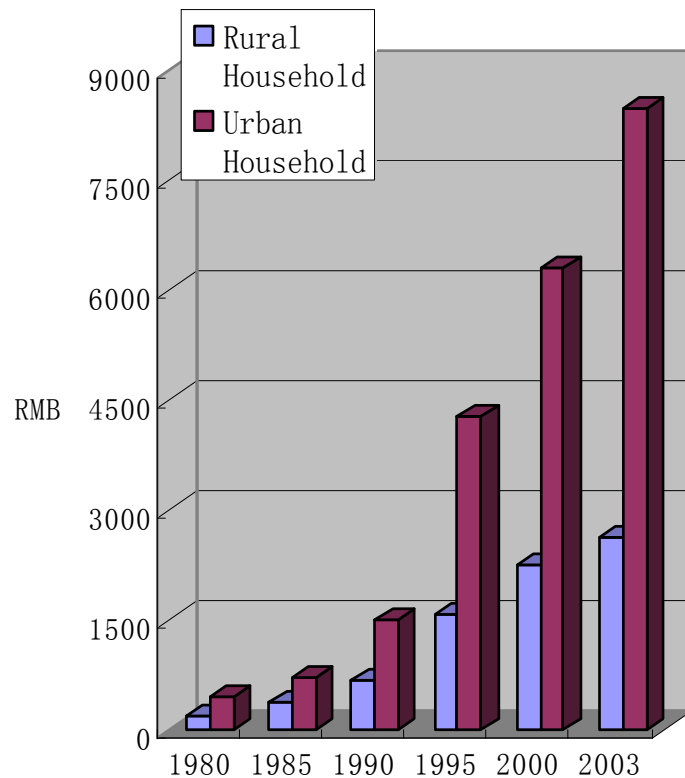
Why are the rapidly development of
SMs in China



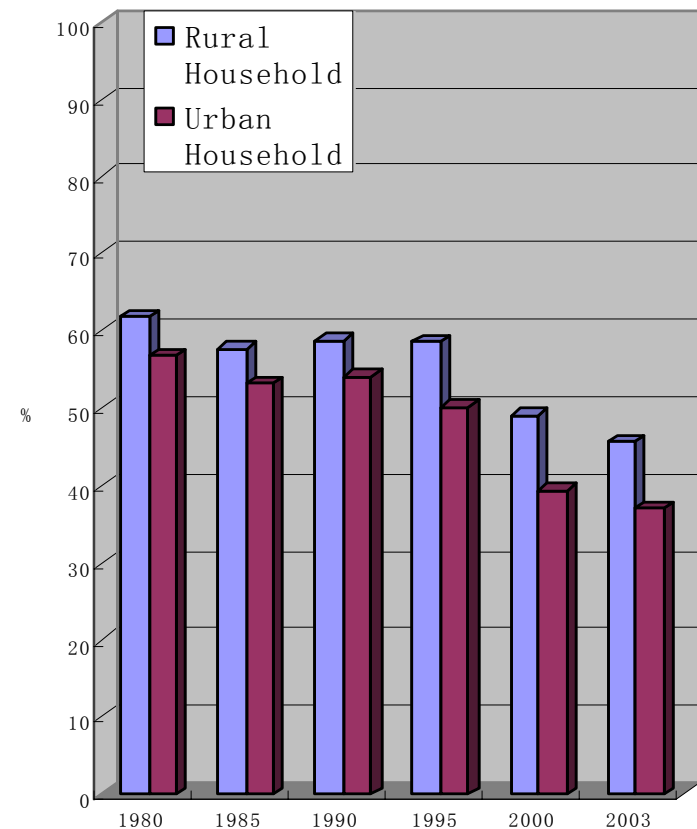
1、经济发展和城乡居民收入提高

Development of economy and raising income of residents

Per Capita Annual Income of Urban and Rural Households

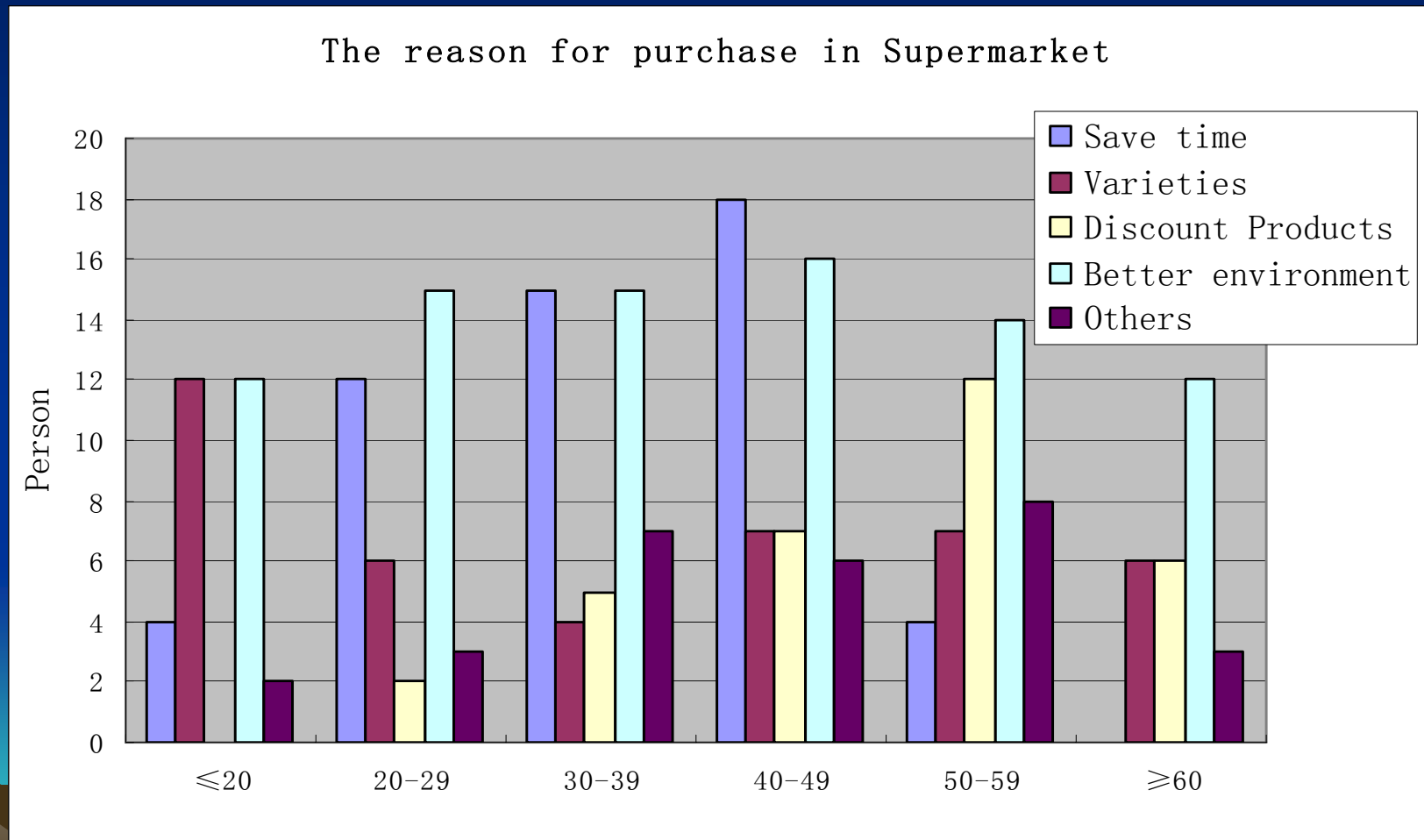


Engle Coefficient of Urban and Rural Households



2、消费者需要更加好的购物环境

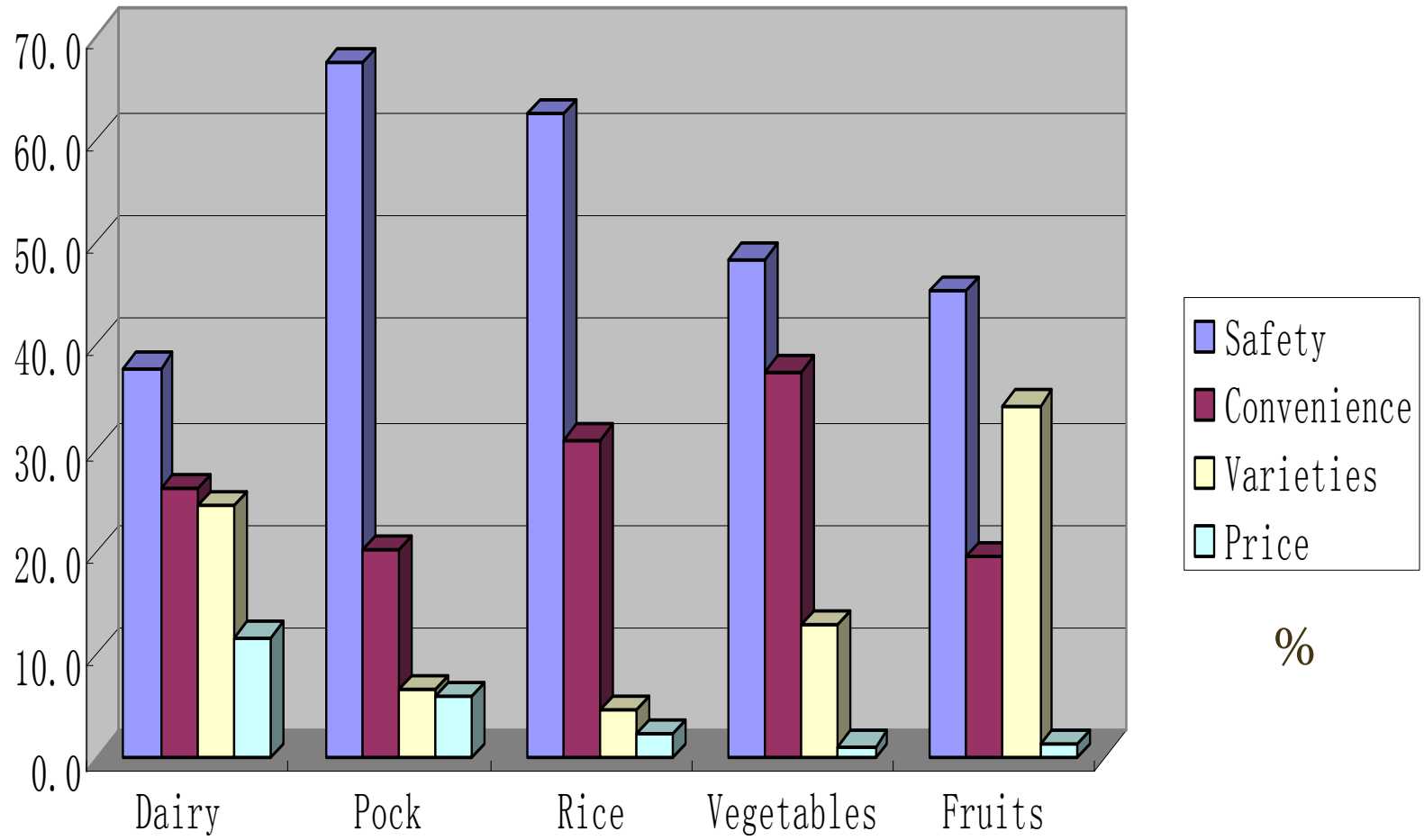
Consumers need better shopping Environment



A survey on 240 Beijing Households by author, 2004

3、购买到安全和可靠的商品

Needs of safety and quality agri-food



A survey on 240 Beijing Households by author, 2004

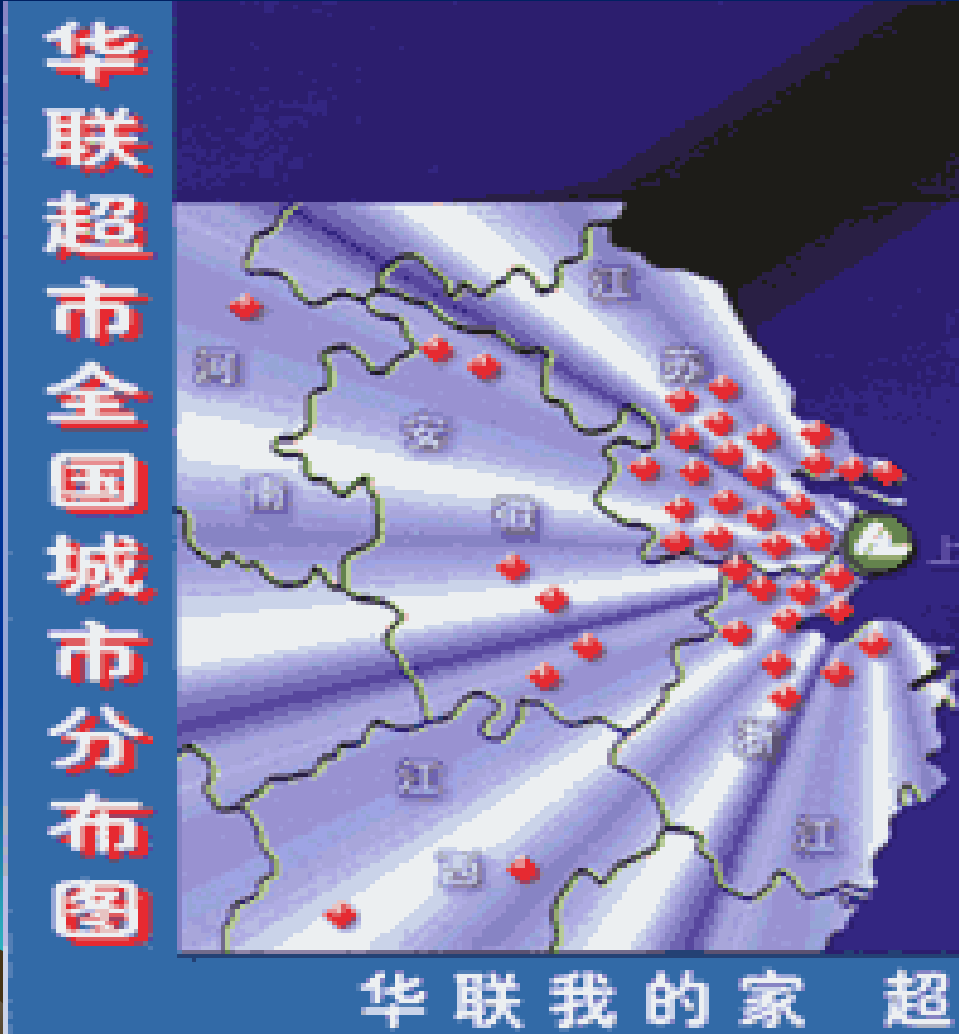
4、超市试图通过规模化来取得经济效益

Supermarkets attempt to gain profits
from increasing scales



(1)连锁超市开设新门店

SM chains open new stores



(2) 大规模的国内外超市兼并中小超市;
Large Chinese and foreign chains are
acquiring smaller and medium chains



超市收购情况(2002-2005)

Supermarket chain buy list (2002-2005)

Year	Name	Be Bought Chain	Area	Investment (100 0 US\$)	store Number	Explain
2002	Lianua	Huashang Group	Hangzhou	25301		
2002	Huanren	Suguo	Nanjing			Buy 39.25% Stocks
2002	Huaren	Huaren Wanfang		16867	150	
2002	Huarun	Guangdong Baihui				
2002	Carrefour	Tianjin Quanye	Tianjin	10000	4	
2002	Huishang Group	Shangzhidu	Hangzhou			
2002	Beijing Huanlian	Beijing Small SM Chains		37711	40	
2002	7-eleven	Shanghai Liangyou			550	
2003	Dashang Group	Tiankelong	Beijing			Buy 34.77% Stocks
2003	Shoulian Group	Itanfu SM Chain	Beijing	10000	16	
2003	Huanrun Group	Huanlian	Shanghai	9639		Buy 20.0% Stocks
2004	Tesco	Lrgou		260000		Buy 50.0% Stocks
2004	Wu-mart	Chaoshifa	Beijing	8875		Buy 25.03% Stocks
2004	Wu-mart	Darong	Tianjin		12	
2004	Lianhua	Youjia Group	Shenyang		2	
2004	Lianhua	Xiebei	Hongzhou	1181		Buy 25.03% Stocks
2004	Lianhua	Jiadelili	Linan		7	
2004	Huarun	Suguo	Nanjing	4578		Buy 34.25% Stocks
2004	Dashang Group	Hayibai	Haerbing			
2005	Lianhua	Wanlifu	Shijiazhuang	9277		Buy 34.25% Stocks
2005	Lianhua	Dasuang Group	Dalian	8675		Joint venture
2005	Lianua	Jiayong	Nanning	12892		

5、外资超市进入中国市场

foreign chains enter China

Year	Name of Company	Country	Place of first Supermarket
1991	Yohan	Japan	Shanghai
1992	7-Eleven	Japan	Shenzhen
1995	Carrefour	France	Shanghai
1996	Metro	Germany	Shanghai
1996	Wal-Mart	USA	Shenzhen
1997	Lotus Super Center	Thailand	Shanghai
1998	Ito Yokado	Japan	Beijing
1999	Auchan	France	Shanghai



外资超市在中国销售额156亿美元，门店3402家。 4.6%门店， 占销售总额的21.9%.

Sales of foreign chains in China in 2004 at 15.6 billion US\$ & 3402 Stores

No.	name of SM Chain	Sales (US\$ Million)	Number of Stores	No.	name of SM Chain	Sales (US\$ Million)	Number of Stores
1	家乐福 (Carrefour)	1957	62	14	华堂 (Ito Yokado)	349	5
2	苏果 (Suguo)	1672	70	15	百佳 (Parknshop)	331	31
3	好又多 (Trust Mart)	1446	88	16	万客隆 (Makro)	181	6
4	百胜集团 (YUM!)	1430	1400	17	德客士 (Dicos)	122	383
5	华润万家 (Huarun)	1327	476	18	欧倍德 (OBI)	12	11
6	大润发 (darenfa)	1145	40	19	全家便利店 (Family Mart)	96	43
7	沃尔玛 (Wal-Mart)	920	43	20	冠军 (Chamion)	60	6
8	百盛 (parkson)	892	30	21	天津大荣 (Daiei)	54	12
9	易初莲花 (Lotus)	891	41	22	7-Eleven	54	198
10	乐购 (TESCO)	843	31	23	喜事多 (C-store)	54	150
11	锦江麦德龙 (Metro)	778	23	24	罗森 (Lawson)	27	120
12	太平洋百货 (Pacific)	518	10	25	屈臣氏 (Watson)	18	100
13	欧尚 (Auchan)	423	11	26	OK便利店 (OK)	7	12
					Total	15607	3402

6、政府的各项有利政策 Government policies

- 1、农改超政策； Policies of Changing wet-market into SM;
- 2、商务部的“万村千乡”工程。给与扶持政策，引导流通企业在3年内建立25万家乡和村一级连锁“农家超市”。
Project of Ministry of Commerce:
“Ten thousands villages and thousands counties project”, to set up 250,000 supermarkets in rural areas with in 3 years.

超市发展对食品供应链的影响

Impact of SM Development up the food
supply chain



1、改变了传统食品供应链

Set up a new food supply chain

超市在供应链内引进了供应商

SMs introduce suppliers into supply chain.



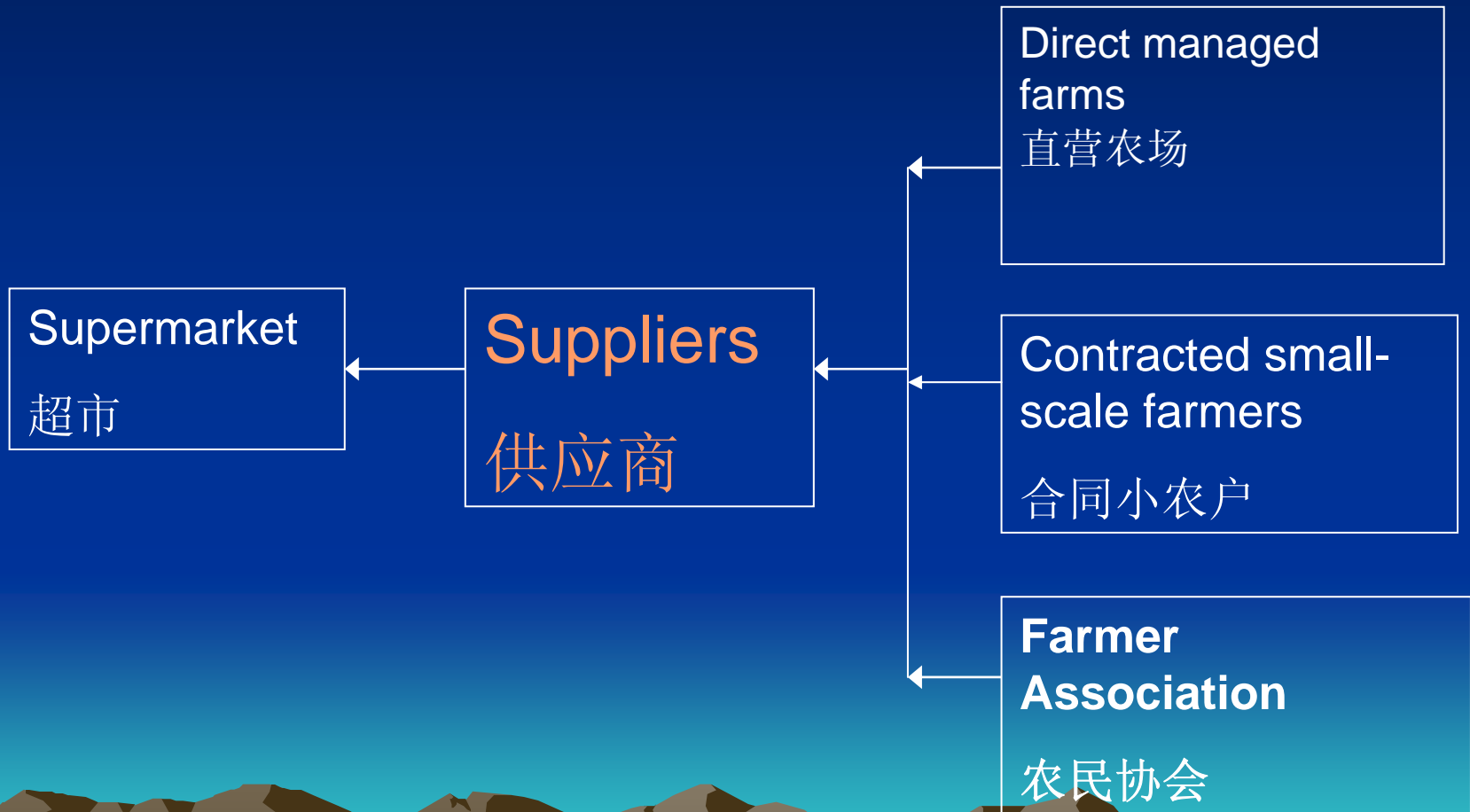
北京地区家乐福超市有三家蔬菜供应商：北京方圆平安安全食品开发公司；古机鸿食品商贸有限公司和凌云鸿食品有限公司；

Carrefour chain in Beijing has 3 vegetable suppliers, Beijing Fangyuan Ping'an Safety Food Development Co., Gujihong Trade Co. Ltd. and Lingyuanhong Food Co. Ltd.



2、引进新的农产品生产模式

Introduce new agri-food production model



北京方圆平安安全食品开发公司 Beijing Fangyuan Ping'an Safety Food Co.

方圆在北京市朝阳区孙河镇建立了400公顷的示范基地，生产各种有机和绿色食品蔬菜。2004年方圆的年蔬菜销售量为2万多吨，销售额达到1.7亿元。

Fangyuan sets up 400 ha directly managed farm in Chaoyang district in Beijing, which cultivates green and organic vegetables. In 2004 the output of vegetables was at 20,000 tons, and sales at 170 million RMB.





3、引进现代化物流管理技术

Introduce new technical of distribution



部分大型的连锁超市开始建立物流中心

Build distribution centers with warehousing and transportation facilities



整个连锁超市采用计算机单品管理

Computerized inventories



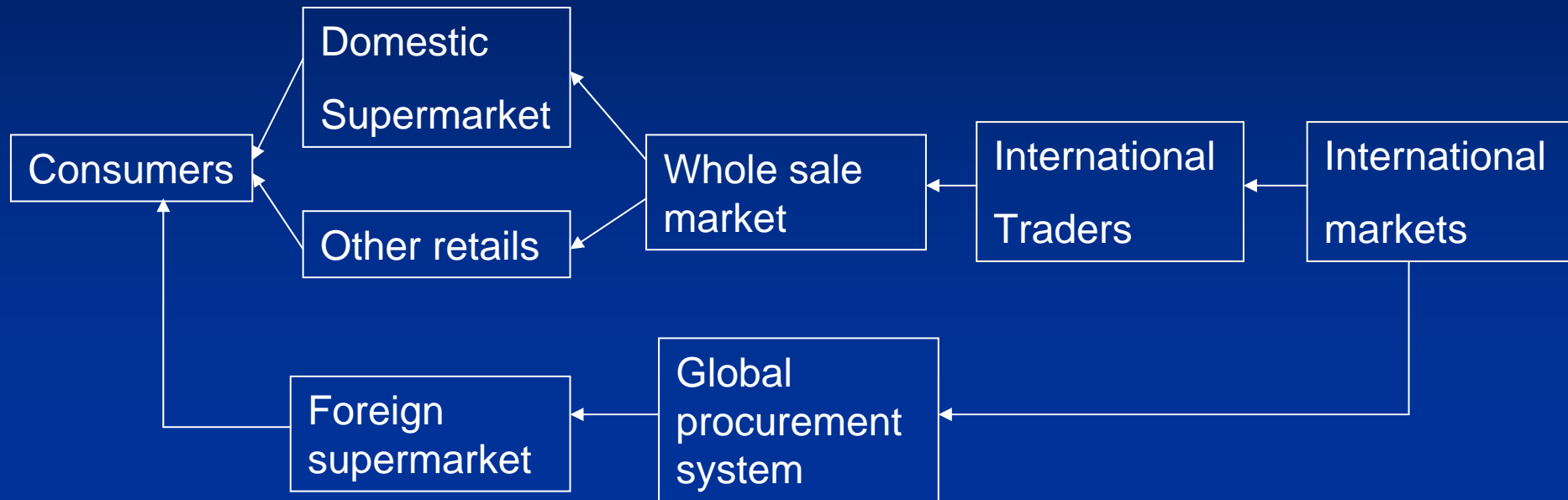
4、加快进口食品进入中国市场的速度

Increasing the speed of import food into domestic markets



国外农产品进入中国途径

The routes of Foreign Agri-foods into domestic market



进口食品进入中国市场需要有一个消费者认识和接受的过程。国外食品进入中国市场的途径是：

Import agri-food into the domestic market needs a process of consciousness and acceptance by consumers; The means of foreign agri-food to enter the domestic market are as follows:

- (1) 首先满足在中国的外国消费者需求(国外超市) ;
Satisfy with demands of foreign consumers in China (Foreign SM);
- (2) 满足有国外生活经验消费者需求 (国外超市) ;
Satisfy with the Chinese people who has living experiences abroad (Foreign SM);



(3) 被少数接受新事物消费者采用（国外和国内超市）；

Adopted by few people who love new things
(Foreign and domestic SMs);

(4) 为更加多中国消费者所接受（国内超市）。

Accepted by most Chinese consumers
(Domestic SMs)

案例：奶酪,黄油和新品种的水果，蔬菜

Cases: cheese, butter, new varieties of vegetable
and fruits





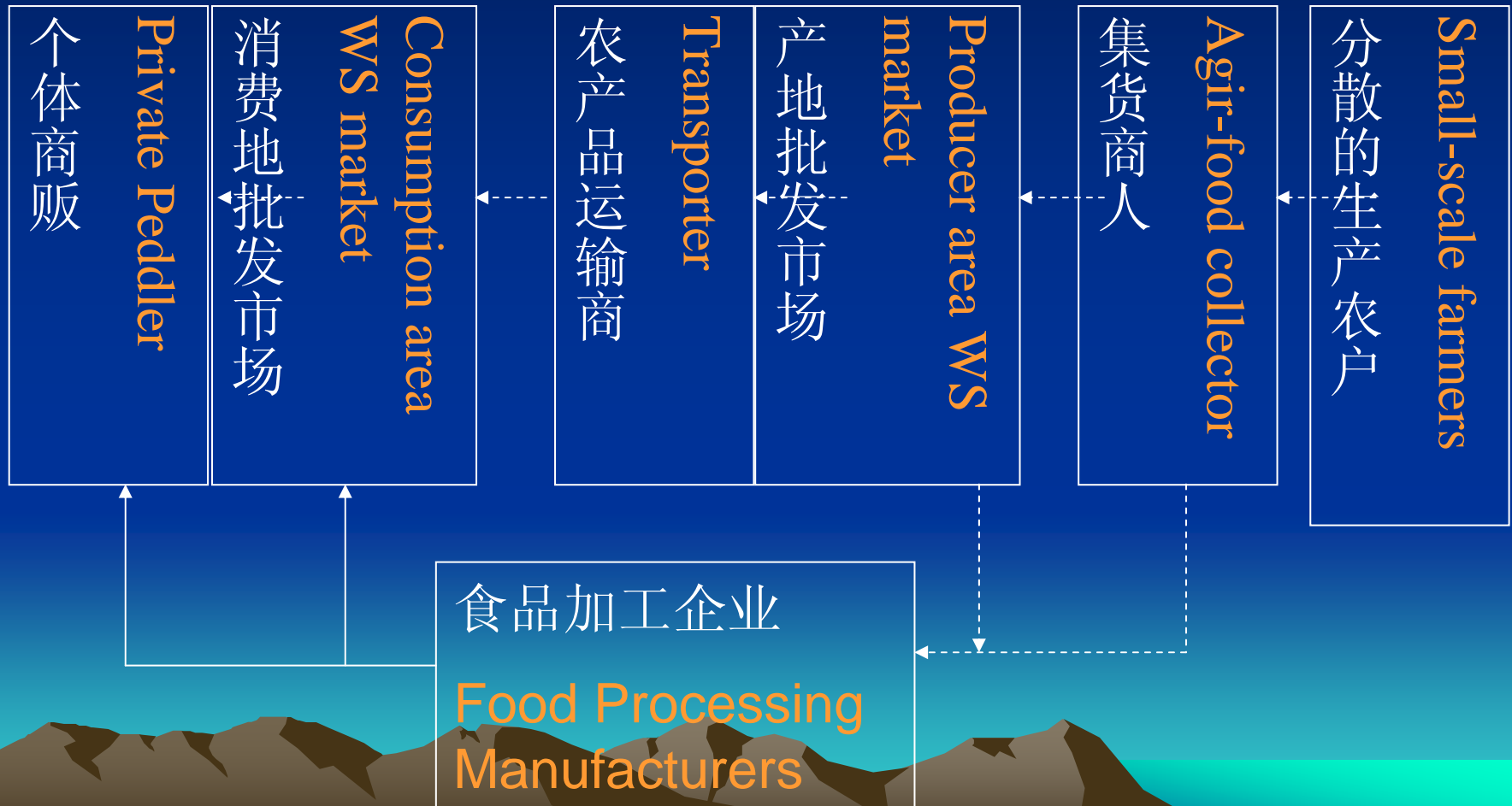
5、建立食品安全的供应链

Set up a safety food supply chain



传统的食品供应链

The traditional food supply chain



传统食品供应链存在的问题

Issues of traditional food supply chain

1、从生产到零售为止整个供应链的中间环节过于多；

There are too many intermediate stages from the beginning to the end of the supply chain;

2、供应链上各个环节之间缺乏有机联系；

Lack of connection among different stages;

3、机会主义存在，各个环节都有人为地损害食品安全的因素存在；

As opportunism existed, every links in the supply chain has a motive to hazard food safety;

4、消费者缺乏信心；

Consumers have less confidence for food safety.



超市为了增加同农贸市场和其它超市的竞争力，正在引进安全食品管理体系。

Supermarkets are introducing food safety and quality management system in order to increase competition power.



家乐福的食品安全控制项目

Carrefour CQL Project in China

1. CQL Litchi (1999) (荔枝);
2. CQL Pomelo & Mandarin (2002) (柚子和柑桔)
3. CQL Pork Shanghai (Dec. 2003) (猪肉)
4. CQL Pork Beijing (Dec. 2004) (猪肉)
5. CQL Salmon (From Norway, March 2003) (三文鱼)
6. Current Development:
Banana; Apple; Vegetables.

其它超市的质量管理体系

The food quality control system at other SMs

1、洋华堂引进日本的“新鲜食品安全管理系统”；

Ito Yakado introduces “Fresh food manage system ”from Japan into chain store in China.

2、物美超市正在建立“自有品牌的质量管理体系”。

Wu-mart set up “Own brand quality manage system”.



超市销售有机和绿色蔬菜

Organic & Green Vegetables in SM

Name of SM	Variety of vegetable	Organic or green vegetables	Name	Varieties of vegetable	Organic or green vegetable
Huarun	20	15	Huaguan	84	47
Hualian	32	17	Huaguan Shopping Center	70	33
Huapu	20	20	Taixingyuan	33	16
Hua'an	18	10	Wumart Fresh Food	77	46
Zhuangsheng	42	15	Yikelong	47	25
Auchan	87	46	Wumart (Yungang)	17	13
Huaguang	87	47	Wumart	20	9
Carrefour	92	30	Hengyuan	75	40
Chaoshifa	35	29	Wumart hypemarket	18	10
New World	68	68	Lotus (Liuli Bridge)	30	14
Jinkelong	18	0	Shuntianfu	72	30
Lotus	68	50	Huapu (Hangtian Bridge)	20	4
Meilianmei	67	34	Yikelong	32	17

供应商的安全优质农产品生产模式

The safety Agri-food productions are under the management of supplier

(1) 供应商直属农场：对生产的全过程进行管理；

Supplier's farm: to be managed at entirely by supplier self;

(2) 供应商的生产基地：

Supplier's AF production base;



供应商的农产品生产基地

Supplier's Agri-Food production base

通过签订合同的方式，在有条件的乡村建立基地。向合同农户提供种子，化肥、农药等生产资料，派遣技术人员人员对农户的生产进行指导和对生产过程进行控制。

Supplier set up the AF productive bases at certain village which productive condition fit for safety and quality AF. Supplier provide seeds, pesticide, chemical fertilizer, and give technical support to contracted farmers, at the aim to control productive process.



食品供应链的二元结构论

On the Twain Food Supply Chain in China

中国同时并存两条食品供应链

There are two agri-food supply chains in China;

(1) 一条是超市和供应商控制下食品供应链;

One food supply chain is under management of supermarket and suppliers

(2) 另一条是小规模农户+批发市场+个体摊贩的品供应链;

The other is small scale farmers + wholesale market + peddlers.



两条食品供应链的区别

The difference of two supply chain

超市和供应商管理下安全优质食品供应链
可以对产品进行跟踪追溯，确保安全性；

The food in the supermarket supply
chain could be traceable;

小规模农户，批发市场和个体摊贩供应链
无法追溯，很难保证食品的安全。

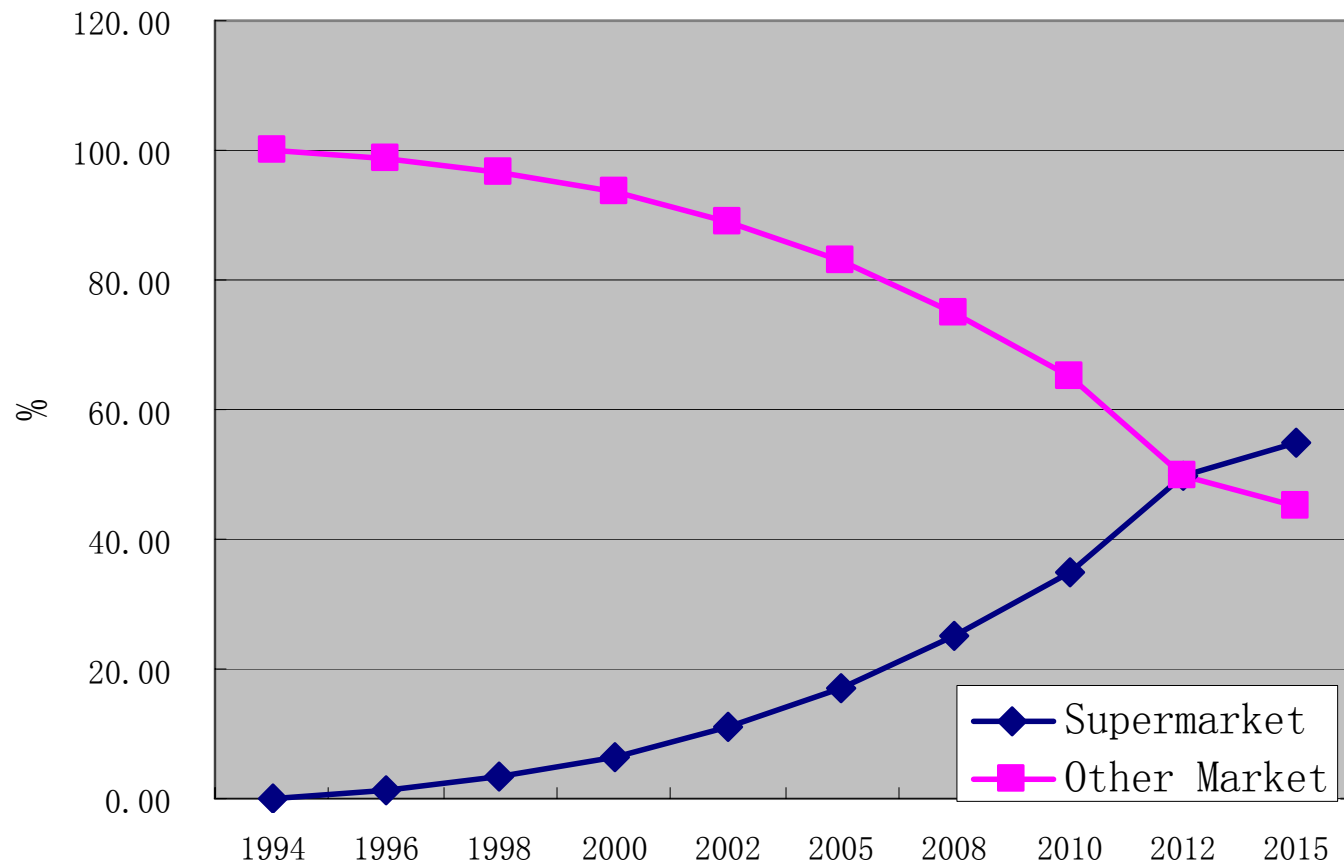
The food at paddlers could not be traceable.



对中国零售业的展望（超市每年递增5%）

Prospect of Retail Sector in China

The Proportion of Supermarket Sales at Total Retail



超市发展对传统零售商影响

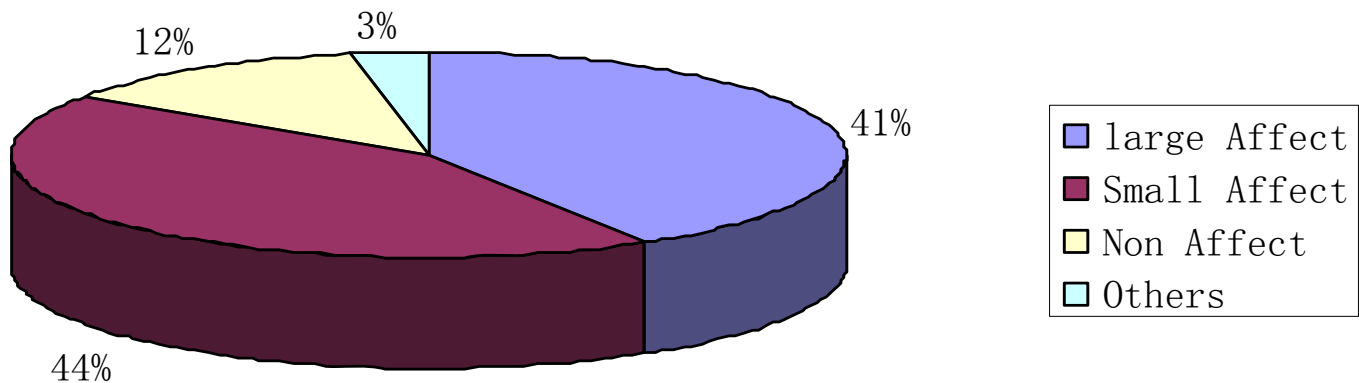
Impact of SM development upon
traditional retail sector





超市发展对传统零售商生意的影响

Affects of supermarket upon peddlers' business

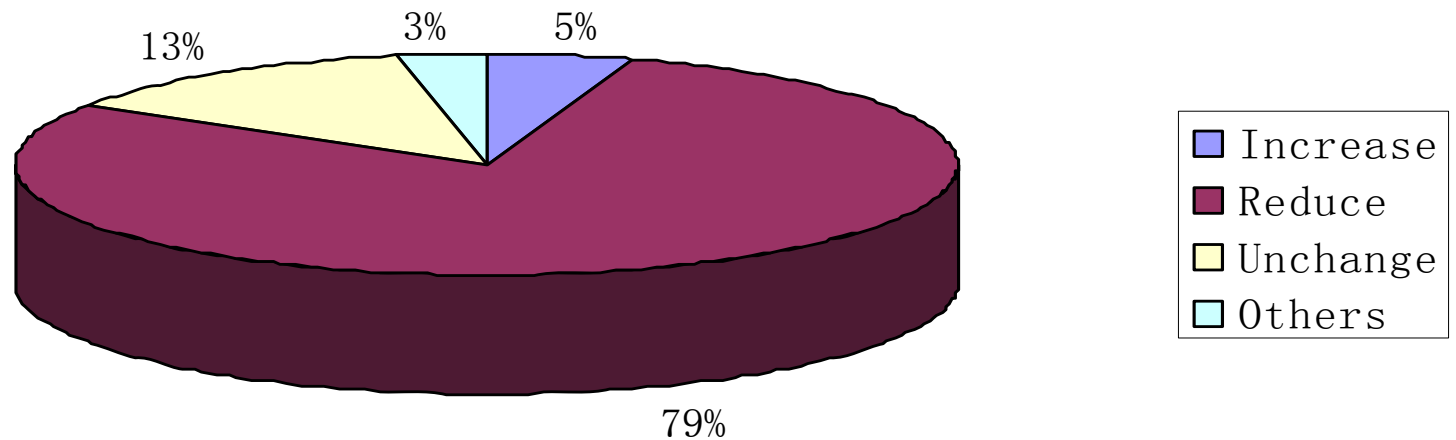


The survey on 100 small retail stores in Jinahou, Hubei Province

By Qi Dongliang, January 2005

超市发展对商贩销售额影响

Impact of SM upon the sales of peddlers

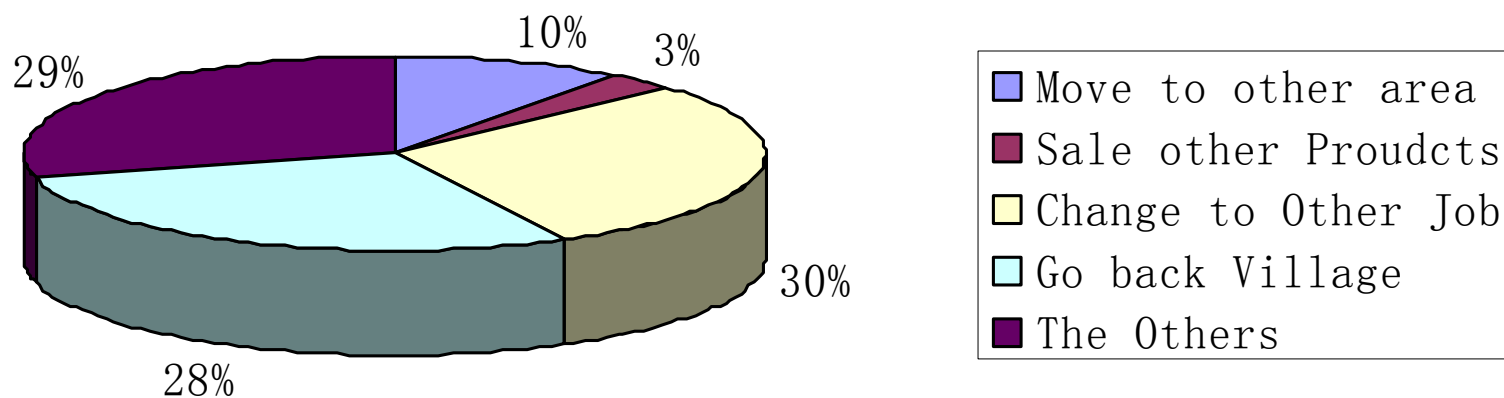


The survey on 100 small retail stores in Jinahou, Hubei Province

By Qi Dongliang, January 2005

小商贩将来的打算

The plan of peddlers in future



The survey on 100 small retail stores in Jinahou, Hubei Province

By Qi Dongliang, January 2005

需要解决的问题

Issues to be resolved



1、很多相关的政府部门还没有意识到超市发展对农业、流通、加工业和消费影响；

Many relevant government departments have not recognized the effect of SM development on agriculture, distribution sector, processing industry and consumption;

2、农民还没有建立农民组织来应对超市的发展；

Farmers have not set up farmer's associations to cope with the supermarket development;



3、如何帮助小规模零售业者来应对环境 的变化（组织职业培训）；

How to help small-scale private peddlers to cope with the changing of environment, help them to find out new job (Organize professional training);

4、制定相关政策和法规来帮助建立安全食品供应链；

Formulate relevant policies and regulations to assist the establishment of food safety supply chain;



5、通过国际合作方式来研究超市发展对国际贸易影响问题；

Study on the impact of SM development upon international trade through international cooperation.



总结 Conclusion

超市正在改变着中国！

**Supermarket makes China
changing!**



THANK YOU VERY MUCH!



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