

2018 跨境进口消费 洞察报告

2018
Cross-border
Import
Consumption
Insights Report



CBNDATA × 天猫国际
第一财经商业数据中心

TMALL GLOBAL

PART

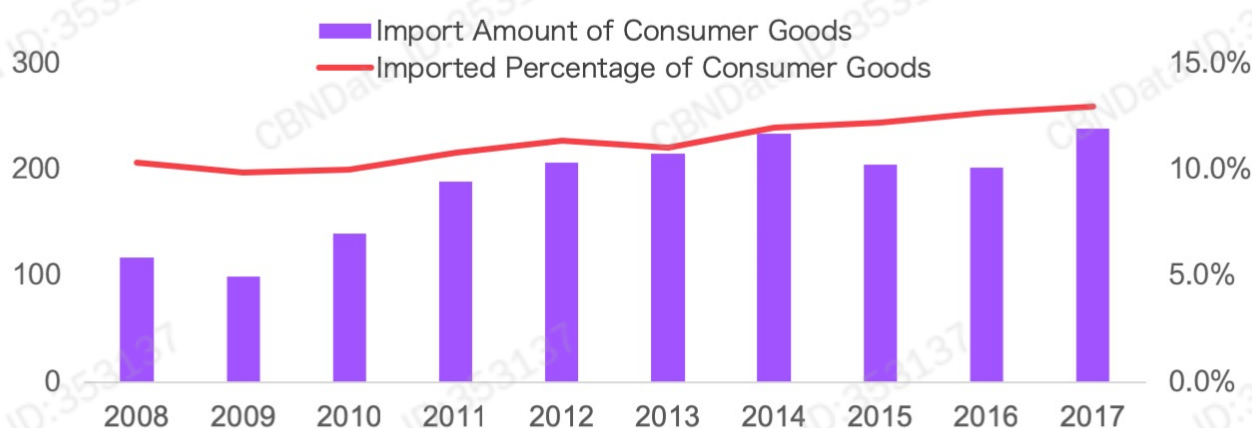


跨境进口消费新常态 Cross-border Import Consumption as New Normal

我国跨境进口消费规模不断增长，进口商品消费需求不断释放 Demand for Imported Goods Continues to Grow while Cross-border Import Consumption Increases

- As cross-border imported e-commerce retailers have continued to emerge and develop since 2010, the demand for imported goods of Chinese consumers has also risen.
- Imported consumer goods grew rapidly in terms of both amount and percentage, reaching 13% in 2017. In 2018, the amount of e-commerce retailer imported goods has increased for almost 40% from 2017.

2008-2017 我国消费品进口额(亿美元)及占比
2008-2017 Consumer Goods Import Amount (US\$ Billion) and Percentage



Data Source : World Integrated Trade Solution (WITS)
Data Explanation : Ratio = Consumer Goods' amount / imported goods' amount

2017-2018 我国通过海关跨境电子商务平台零售进口总额（十亿元）
2017-2018 Cross-border E-Commerce Retailer Imported Goods Amount
(CN¥ Billion) via Chinese Customs



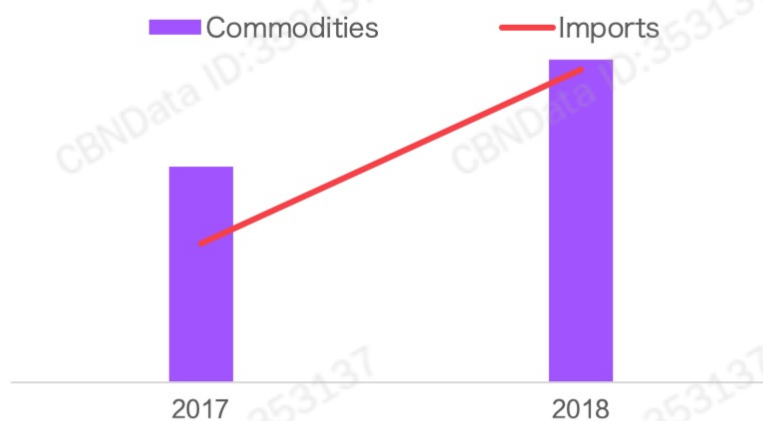
Data Source : Chinese Custom

进口商品市场越来越丰富，消费者选择更多样 More Diversified Import Market Means More Choices for Consumers

- The number of imported goods in 2018 more than doubled than that of 2017. Commodity variety and quantity have increased.
- As of the first three quarters of 2018, the sources of imports of commodities in China have been distributed in more than 200 countries and regions around the world.

2017-2018 中国保税仓进口货品数量及商品个数

2017-2018 Number of Bonded Warehouses Imports & Commodities in China



Data Sources : Chinese Custom

截至2018年前三季度，跨境进口商品来源地更趋多元

Sources More Diversified (First 3 Quarters of 2018)



Data Source : Chinese Custom

跨境电商进口新政落地， 让消费者更方便快捷地“享用”全球好物 New Import Policies Enable ‘More Convenient’ Global Shopping

- In November 2018, Chinese State Council decided to continue to implement the current supervision policy on cross-border e-commerce retail imports from January 1, 2019. The requirements for approval, registration and filing of first-time import licenses for cross-border e-commerce retails are loosened.



新增63个税目商品，品类更丰富 63 New Items, Richer Categories

Further expanded list of duty-free goods via cross-border e-commerce platforms: enjoy **zero tariffs within set quota** and have import VAT and consumer tax collected at 70 percent of the statutory taxable amount.

63 new tax items in categories such as beer, fitness equipment, game consoles, gold, platinum jewelry, etc.

提高税收优惠政策的商品限额 Lifting Tax Benefits



Single Transaction Limit Lifts

2,000 yuan → 5,000 yuan

Individuals are able to purchase higher-priced items

Yearly Transaction Quota Lifts

20,000 yuan → 26,000 yuan
per person per person

Individuals are able to buy more per year

When customs value exceeds the single transaction but is lower than the annual transaction limit, and only one commodity falls under the order, it can be imported via the cross-border e-commerce retail channel. Customs duties, import value-added tax, and consumption tax will be levied in full, with the transaction amount included in the total annual transaction.

政策适用试点城市增加，提升物流时效 More Pilot Bonded Cities & Higher Efficiency



From 15 to 37 Bonded Cities

Remote areas such as Hohhot and Lanzhou have become new pilot bonded cities. Due to the expansion of service scope, cross-border imports purchased by consumers can optimize the selection of the nearest bonded warehouse to deliver goods and effectively enhance the timeliness of logistics.

Data Source : According to public resources

跨境进口电商模式不断突破， 进一步为国人进口消费提供便利，开拓生活边界 Breakthroughs in Cross-border E-commerce Models Make Ways for Import Goods Consumption

- Since 2010, China's cross-border e-commerce has developed rapidly. The one-stop B2C model complements the C2C model to meet the long-tail demand. Industry-specific and comprehensive platforms coexist. With the favorable support of national policies, consumers' difficulty in purchasing overseas goods is constantly reduced.

从属主站型
Corporate

独立型
Independent



Data Source : According to public resources

旺盛的进口消费需求推动跨境进口电商发展， 天猫国际见证进口消费常态化

High Demand drives Development of Cross-border E-commerce Retailers, while Normalization of Import Consumption is witnessed by Tmall Global

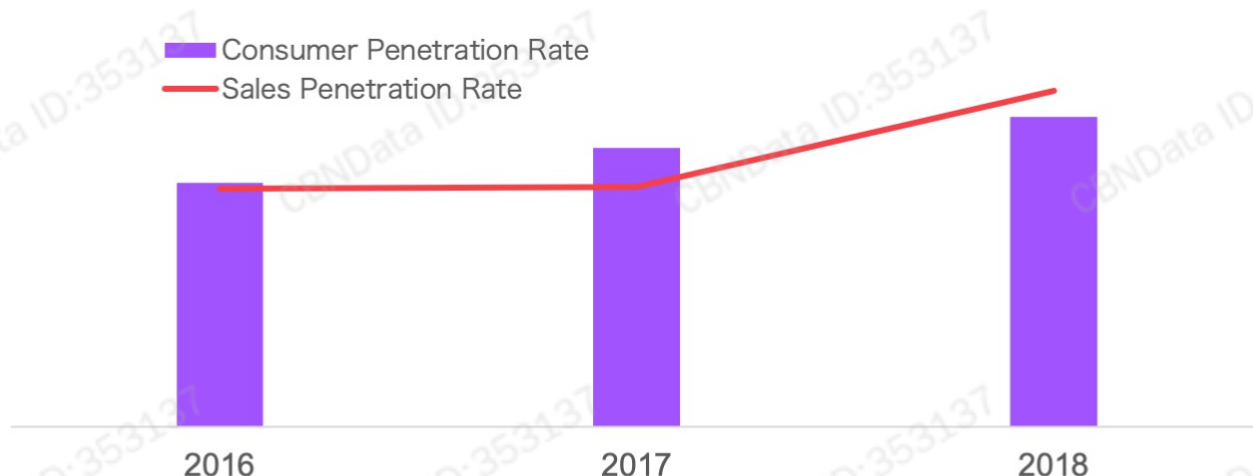
- Market share of Tmall Global ranked first for 3 years, with a market share of 31.7% in the fourth quarter of 2018.
- The proportion of cross-border import consumption in overall online daily consumption has continued to rise.

2018Q4 跨境进口零售电商市场（B2C）竞争格局
2018 Q4 Cross-border E-commerce Retailers Market Share



Data Source : Yi Guan Analysis

2016-2018 天猫国际占淘宝天猫平台的消费重要性
2016-2018 Penetration Rate of Tmall Global in Taobao & Tmall Platforms



Data Source : CBNDATA

Data Explanation : Consumer penetration rate = Tmall Global consumers / Alibaba consumers;
Sales penetration rate = Tmall Global sales amount / Alibaba sales amount

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https://www.yunbaogao.cn/report/index/report?reportId=1_17143

