

Rural E-commerce Adventure in China

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电子商务，不断拓展新经济的版图

E-commerce is rapidly expanding the territory of new economy

阿里零售体的裂变之路

The evolution of Alibaba retail ecosystem

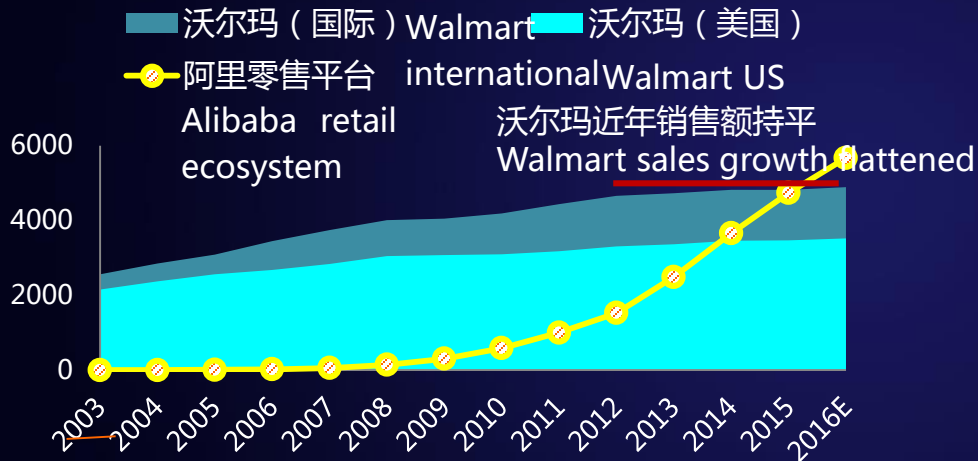


3万亿——电子商务新起点

RMB 3 trillion – the new journey of e-commerce

阿里巴巴零售平台与沃尔玛销售额比较

Alibaba retail ecosystem vs Walmart



交易额突破3万亿时间 Time to exceed the transaction amount of RMB 3 trillion



13 years



53 years

全球250强零售商排行榜(2015财年)

Global top 250 retailers (2015 fiscal year)

Names Sales (100 million USD) Growth rate Format

	企业名称	财年零售营收 (亿美元)	增长率	主要经营模式
1	Wal-Mart Stores 沃尔玛	4821.3	-0.7%	超市、大卖场
2	Costco 好市多	1161.99	3.2%	现购自运
3	The Kroger Co. 克罗格	1098.3	1.3%	超市、大卖场
4	Schwarz 施瓦茨	944.48	8.1%	折扣店
5	Walgreens Boots Alliance 沃博联	896.31	17.3%	药店
6	The Home Depot 家得宝	885.19	6.4%	家居装修
7	Carrefour 家乐福	848.56	3.1%	大卖场、超市
8	ALDI 阿尔迪	821.64	11.5%	折扣店
9	Tesco PLC 乐购	810.19	-12.7%	大卖场、超市
10	Amazon.com 亚马逊	792.68	13.1%	电商

中国农村发展滞后于城市

The development of rural China lags the urban counterpart

42.6%

- 中国有42.6%的人口居住在农村
- 42.6% of China's population lives in rural area

2.7X

- 城镇居民人均收入是农村的2.7倍
- The average income in urban China is 2.7 times of the rural counterpart

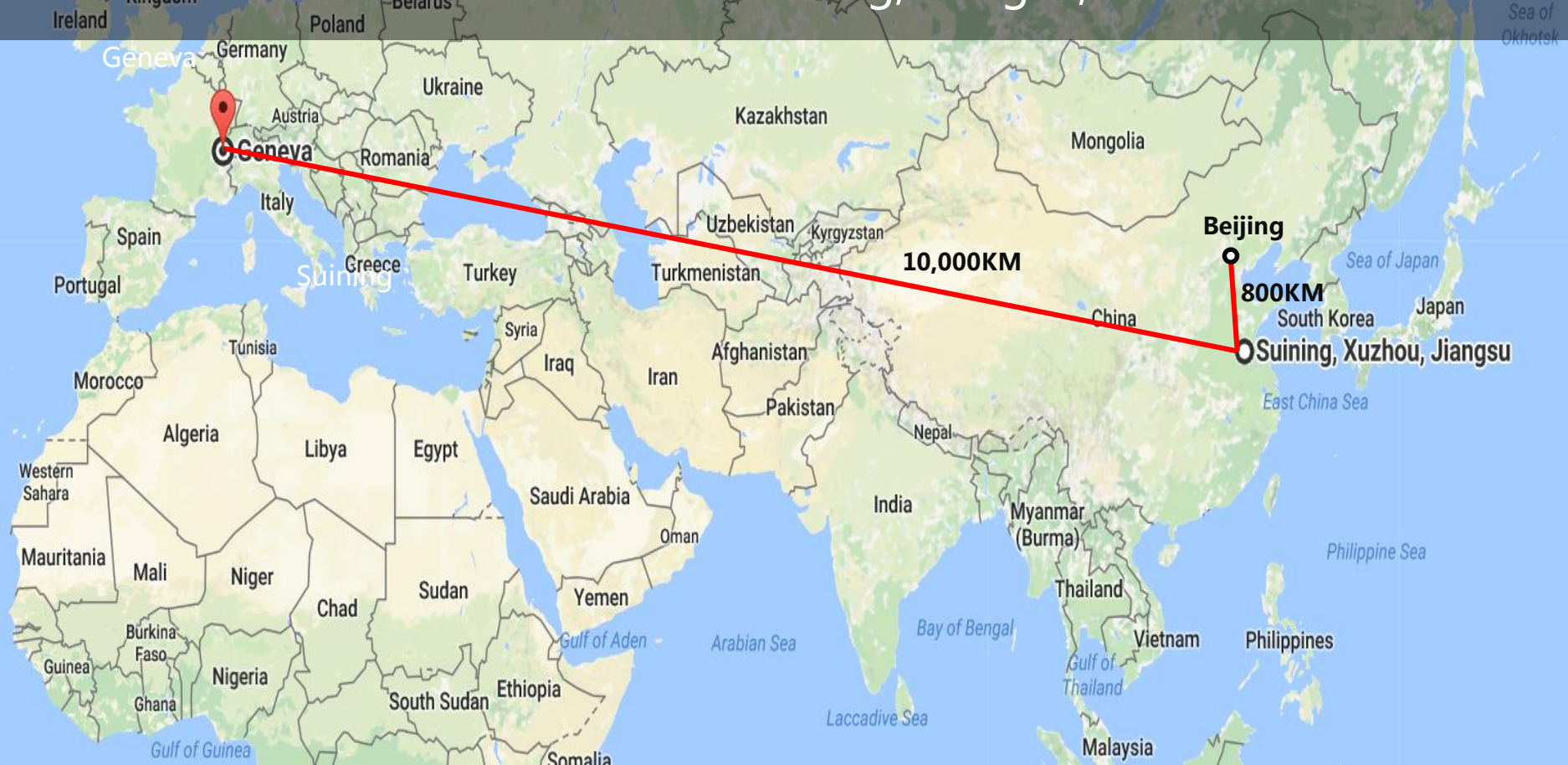
Source: China National Bureau of Statistics

农村遇到电子商务，会擦出怎样的火花？
What will happen when rural China meets e-commerce?



中国江苏睢宁——被电子商务改变的村庄

E-commerce has transformed Suining, Jiangsu, China



沙集三剑客传奇

The Three E-commerce Musketeers in Shaji, Suining



年轻人回乡创业

- 2006年，在江苏省睢宁县沙集镇东风村，三位年轻人孙寒、夏凯、陈雷尝试通过电子商务创业。

低成本起步

- 发现线下模式的投入成本高、发展时间长、风险巨大，因此将电子商务做为第一选择。通过天猫和淘宝平台，直接对接消费者。

草根裂变式发展

- 越来越多的村民看到开网店的好处，纷纷放下锄头。目前村里90%以上的年轻人都选择回乡开店，有资金的都和孙寒一样投资建厂；资金不足的，就从邻居家的工厂里进货、开网店售卖，全村开起上万家网店。

Young people returned home to start businesses

- In 2016, H. Sun, K. Xia and L. Chen returned to hometown and started e-commerce business.

Low e-commerce investment

- They found the disadvantages of the off-line channel, such as high initial investment, long cash flow cycle and high market uncertainty. On the Tmall and Taobao platforms, they directly reached consumers

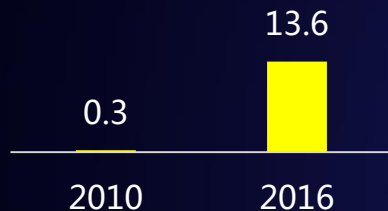
Rapid development of grassroots entrepreneurship

- Currently, 90% of young people open factories or open e-stores.



电子商务，让睢宁经济产生质的飞跃 E-commerce has created the new economic landscape in Suining

睢宁电子商务交易额（人民币十亿）
Suining e-commerce sales (RMB billion)



Equipment



2010

2016



36,900个网店 online stores

83家物流企业 logistics providers

200,000就业创造

job opportunities were created

Logistics

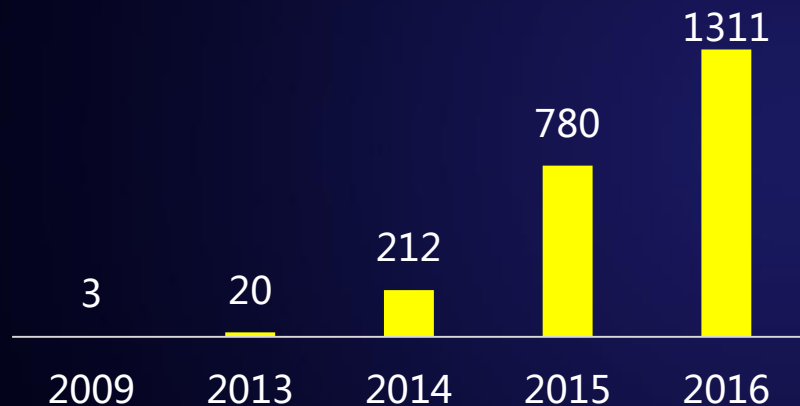


淘宝村星星之火，可以燎原

Taobao Village has sparked the next wave of rural development in China

淘宝村数量

of Taobao Villages



淘宝村：电子商务年交易额达到**1000万元**以上的村庄
Taobao Village: the minimum annual e-commerce sales is **RMB 10 million**

中国商务部数据显示：2016年，中国农村网络零售额达**8945亿元**。

Online retail sales of Rural China in 2016

RMB 894.5 billion

农村电商释放农村购买力

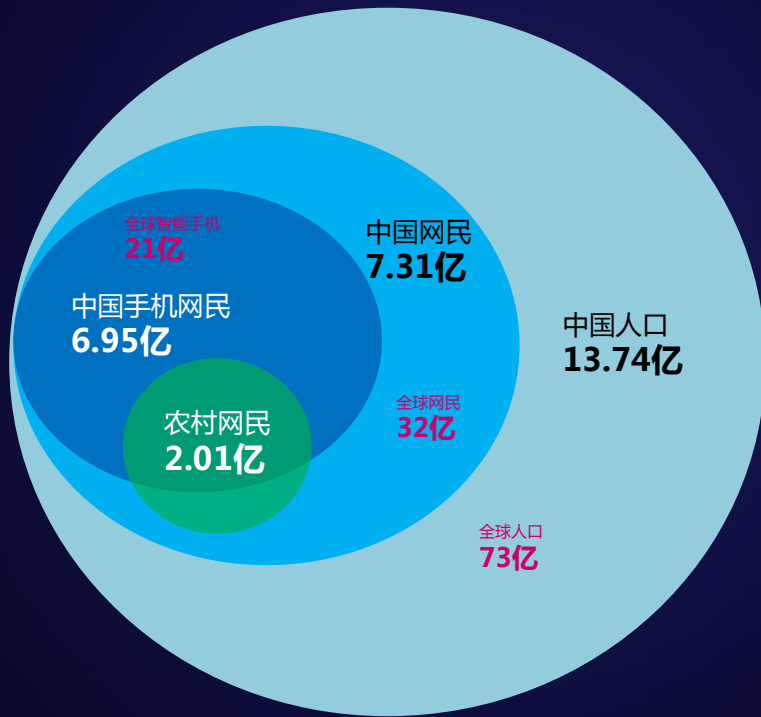
E-commerce has unleashed purchase power in rural China



Rural Taobao
delivery vehicle

2亿农民网上行

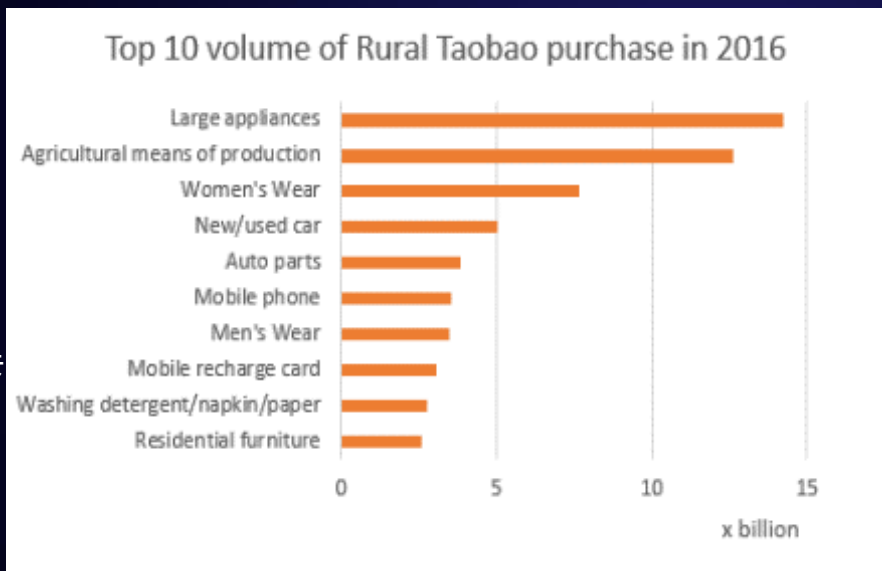
200 million rural population now has access to internet in China



农村淘宝——“想得到，买得到”

Farmers can buy almost whatever they want on Rural Taobao

农村淘宝销售十大品类



大家电
农用品
女装
汽车
汽车零件
手机
男装
手机充值卡
清洁用品
家具



- 在贵州省松桃县落塘村，村民们集资购买了18米长的龙舟，用于端午龙舟比赛
- Farmers in Luotang village, Songtao county, Guizhou bought a 18-meter dragon boat for festival racing

电商让农村和城市居民，享受相同的购物实惠

E-commerce enables rural residents to shop with the same price as in cities

↓ 20%

- 电商比农村线下渠道购物价格低20%
- E-commerce is 20% cheaper the rural off-line channels



- 在福建省尤溪县下川村，村民们购买了3座凉亭，安装到村里的公园，网购节省约一半费用
- Pavilions with the half price compared with the off-line price

案例：农村老人开洋荤

Case: a 92-year-old farmer' s encounter with Italian dinner



- 2015年4月15日，是贵州铜仁江口县云舍村92岁村民杨初学的生日。儿媳妇曾金钗通过“农村淘宝”网页下单，花5000元购买意大利美食套餐。
- A daughter-in-law in rural Guizhou ordered through Rural Taobao the Italian dinner set with RMB 5,000 to celebrate her 92-year-old farther-in-law' s birthday

“千县万村”计划，实现“网货下乡”和“农产品进城”

“1,000 counties & 100,000 villages program” targets to boost trades between urban and rural China

3-5年
3-5 years

100亿元
RMB10 billion

1,000个县级服务站
1,000 county service stations

10万个村级服务站
100,000 village service stations

- “千县万村”计划：用3至5年，阿里巴巴投资100亿元，建立1000个县级服务中心和10万个村级服务站，突破物流和信息的瓶颈，实现“网货下乡”和“农产品进城”。
- “1,000 counties & 100,000 villages program” : Alibaba invests RMB 10 billion to build 1,000 county service stations and 100,000 village service stations within 3-5 years in order to break the bottlenecks of logistics and information. Finally realize two-way goods flow between urban and rural.
- 截至2016年12月，农村淘宝与合作伙伴建立的农村电商服务站覆盖约500个县（市）、近28000个村庄。
- By December 2016, there are 500 county services stations and 28,000 village service stations.

电商消贫

E-commerce fights poverty

输血模式

Old approach



以货币帮扶为抓手，解“近渴”

Mainly use monetary assistance

造血模式

New approach



以电子商务为抓手，赋予创新发展能力，营造生态，建立新农村商业模式

Use e-commerce as enabler to build innovation capability and create rural business ecosystem

Source: AliResearch

利用电商平台，销售本地特色，建立可持续发展的农村商业模式

Sales of local-made goods through e-commerce platform nurture sustainable rural business model

2016年，在阿里巴巴零售平台，超过280个国家级贫困县全年网络零售额达到1000万元，其中40多个贫困县超过1亿元。

In 2016, 280+ national poverty counties sold goods worth of RMB 10+ million through e-commerce platform, among which 40 counties reached sales of RMB 100+ million.



Tea



Orange



Bike

案例：曹县曾经是省级贫困县，无资源、区位优势

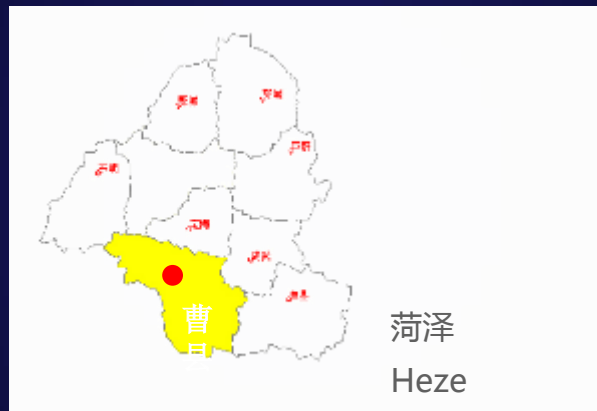
Case: Cao county used to be Shandong province's poverty county without resource and geographic advantage

2014年人均GDP

2014 per capita GDP



10000美元
USD10000



4287美元
USD4287



3245美元
USD3245

山东人均GDP的30%
30% of Shandong

AliResearch
阿里研究院

案例：曹县以演出服饰电子商务为抓手，带领农民走出贫困

Case: Cao county leverages costumes and e-commerce to fight poverty

截至2016年10月

As of October 2016

- 直接带动**6300**多名贫困人口脱贫

Lifted more than **6,300** people out of poverty

- 电子商务交易额超过**25亿元**

Online sales exceeded RMB **2.5 billion**

- 48**个淘宝村 Taobao villages
- 35000**个网店 online stores

曹县全系列演出服饰

Cao county's full collection of costumes



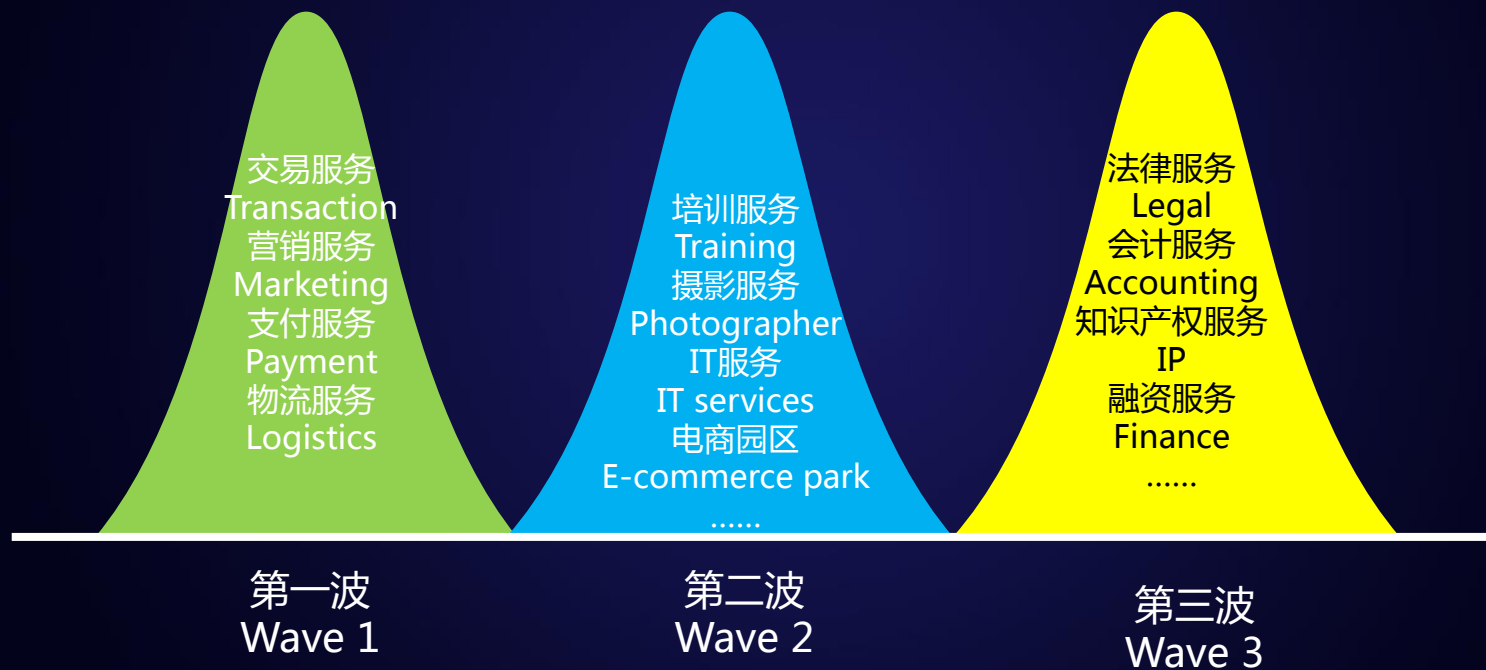
农村电商服务体系日趋完善

Rural e-commerce services system continues to improve

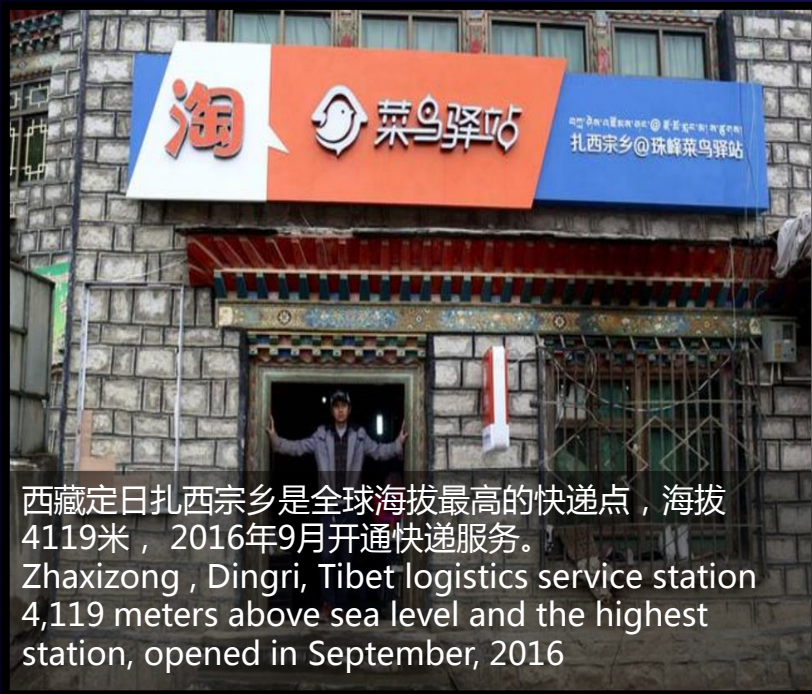


电商服务体系化，助力农村电商发展

The system of e-commerce services fuels e-commerce development



案例：物流和金融服务 Case: logistics and financial services



解构农村电商发展四要素

Anatomy of rural e-commerce development



智能手机
Smartphone

广泛参与
High participation

电商平台
E-commerce platform

政府支持
Government support



农村电商的普惠价值 Inclusive benefits of rural e-commerce

- 1 提供普惠服务，节省消费支出
Provide inclusive services and save consumers' spending
- 2 让技术和商业进入农村，孵化大批创业者
Incubate large number of rural start-ups using technology and business
- 3 带动小农经济产业化，创造大量就业机会
Promote the industrialization of small farmers , create massive jobs
- 4 电子商务有助于减少贫困
E-commerce fights poverty



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