



中国(杭州)跨境电子商务综合试验区
CHINA (HANGZHOU) CROSS-BORDER E-COMMERCE COMPREHENSIVE PILOT AREA

The practice of high-quality development of cross-border e-commerce in Hangzhou New aspects of cooperation with Central Asia

November 2023



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Our awareness

01

To this day, the roulette wheel of globalization is still spinning fast

**32
trillion
dollars**

In 2022, the total global trade volume will reach 32 trillion US dollars, a year-on-year increase of 12.2%, of which the total import and export value of service trade will reach 7 trillion US dollars, a year-on-year increase of about 15%.

**34.4
trillion
yuan**

From 2012 to 2022, the added value of China's manufacturing industry increased from 16.98 trillion yuan to 34.4 trillion yuan, accounting for 27.7% of GDP, an increase of 0.2% year-on-year.

**703.65
billion
yuan**

From January to June 2023, the actual use of foreign investment in the country was 703.65 billion yuan, a year-on-year decrease of 2.7%.

**6.52
trillion
yuan**

In 2022, the trade volume between China and ASEAN reached 6.52 trillion yuan, a year-on-year increase of 15%, accounting for 15.5% of China's total foreign trade imports and exports.

**116.04
billion
US
dollars**

In 2022, the bilateral import and export volume of goods between China and Saudi Arabia was US\$116.04 billion, a year-on-year increase of 33.1%, of which exports increased by 25.7%.

Despite its challenges, globalization remains deeply rooted

Compared with the two-way trade between developed and developing countries in Europe, the United States and Japan in the early days, globalization in the future will give rise to more trade between developing countries

Economic globalization 1.0, which emerged in the 80s, was more of a restrictive globalization, and now a new global order is being established



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China's cross-border e-commerce from January to December 2022

15.7
trillion
Turnover

10.56%
increase

42.07
trillion
Trade in
goods

37.32%
Cross-border
e-commerce
accounts for
trade in goods

2.11
trillion
Customs
Data

In 2035, 50% of China's foreign trade will rely on cross-border e-commerce

The new foreign trade format with the fastest development speed, the greatest potential and the strongest driving effect



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2022 China's Top 50 Overseas Brands

#1 ByteDance Brand Power 2,484 Content Apps	#2 Alibaba Group Brand Power 2,258 E-commerce	#3 Lenovo Brand Power 1,898 Consumer Electronics	#4 MI Brand Power 1,859 Consumer Electronics	#5 HUAWEI Brand Power 1,674 Consumer Electronics	#6 oppo Brand Power 1,349 Consumer Electronics	#7 Hisense Brand Power 1,241 Home Appliances	#8 ONEPLUS Brand Power 1,124 Consumer Electronics	#9 Haier Brand Power 1,098 Home Appliances	#10 SHEIN Brand Power 1,070 Online Fashion
#11 vivo Brand Power 975 Consumer Electronics	#12 ANKER Brand Power 912 Consumer Electronics	#13 腾讯 Tencent Brand Power 847 Mobile Gaming	#14 TSINGTAO Brand Power 740 Alcoholic Drinks	#15 AIR CHINA Brand Power 725 Airlines	#16 FUNPLUS Brand Power 714 Mobile Gaming	#17 dji Brand Power 626 Smart Devices	#18 TCL Brand Power 614 Home Appliances	#19 ECOVACS Brand Power 565 Smart Devices	#20 miHoYo Brand Power 512 Mobile Gaming
#21 中國東方航空 CHINA EASTERN Brand Power 500 Airlines	#22 ZTE中兴 Brand Power 493 Consumer Electronics	#23 LUITH Brand Power 477 Mobile Gaming	#24 中國銀行 BANK OF CHINA Brand Power 459 Banks	#25 HONOR Brand Power 456 Consumer Electronics	#26 tp-link Brand Power 445 Consumer Electronics	#27 BYD Brand Power 422 Cars	#28 37GAMES Brand Power 421 Mobile Gaming	#29 IGG Brand Power 420 Mobile Gaming	#30 DiDi Brand Power 399 Transportation Apps
#31 GWM Brand Power 395 Cars	#32 CHERY Brand Power 391 Cars	#33 CENTURY GAMES Brand Power 386 Mobile Gaming	#34 NETEASE Brand Power 382 Mobile Gaming	#35 GEELY AUTO Brand Power 366 Cars	#36 zenjoy Brand Power 365 Mobile Gaming	#37 Midea Brand Power 357 Home Appliances	#38 IM30 Brand Power 351 Mobile Gaming	#39 KUNLUN Brand Power 348 Content Apps	#40 JAC MOTORS Brand Power 335 Cars
#41 MAGIC TAVERN Brand Power 334 Mobile Gaming	#42 ICBC Brand Power 327 Banks	#43 KUAISHOU Brand Power 325 Content Apps	#44 JD.COM Brand Power 317 E-commerce	#45 WORX Brand Power 313 Home & Garden	#46 AUKEY Brand Power 312 Consumer Electronics	#47 ECOFLOW Brand Power 312 Consumer Electronics	#48 Light in the box Brand Power 312 E-commerce	#49 FlexiSpot Brand Power 297 Home & Garden	#50 realme Brand Power 294 Consumer Electronics

- The global awareness of Chinese brands continues to increase
- Consumer electronics, smart devices related to strong performance
- Emerging markets provide growth drivers
- Nearly half of them are cross-border e-commerce enterprises



The state has intensively introduced cross-border e-commerce support policies

In January 2022, the State Council approved 27 new cross-border e-commerce comprehensive pilot zones

In April 2022, the State Administration of Taxation and other ten departments issued a notice on further increasing the support for export tax rebates to promote the steady development of foreign trade, and support the healthy, sustainable and innovative development of cross-border e-commerce

In May 2022, the Opinions of the General Office of the State Council on Promoting the Stability and Quality of Foreign Trade (Guo Ban Fa [2022] No. 18) pointed out that it is necessary to promote the accelerated development of cross-border e-commerce to improve quality and efficiency

In June 2022, the People's Bank of China (PBoC) issued the Notice on Supporting Cross-border RMB Settlement in New Foreign Trade Formats to support banks and payment institutions to better serve the development of new forms of foreign trade

In November 2022, the State Council approved 33 new cross-border e-commerce comprehensive pilot zones

In January 2023, the Ministry of Finance, the General Administration of Customs, and the State Administration of Taxation jointly issued a notice that 1210, 9610, 9710, and 9810 declared for export, and the goods (excluding food) returned to the country in their original state within 6 months from the date of export due to unsalable and returned goods can achieve "zero tax burden"



Cross-border e-commerce industry trends

Amazon's stage of seeking benefits from the market is about to enter a stage of seeking benefits from management

Cross-border **sellers integrate the supply chain, improve the efficiency of the organization's basic capabilities, and achieve a closed-loop of scale effect**

The priority of competition **has shifted from cost over quality to service and price**

Core Competitive Factors:

Accurately understand the user segmentation needs of next-generation products

Reasonable product mix

Improve the quality of core products

A broader product-side layout

The ability to build a systematic system of the whole organization



Enabled by digital infrastructure

The rise of new consumer groups

Tons of new opportunities are spawned

**"In the era of the digital economy
All the business is worth doing all over
again."**



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Our advantages



General Secretary Xi Jinping is cordial and caring for Hangzhou



- Hangzhou is a historical, cultural and commercial center in China, with a history of more than 1,000 years. For thousands of years, from Bai Juyi to Su Dongpo, from West Lake to the Grand Canal, Hangzhou's long history and cultural legends are fascinating.
- Hangzhou is a city of innovation and vitality, e-commerce is booming, and the whole world is connected with the click of a mouse in Hangzhou.
- Hangzhou is also the capital of ecological civilization, with beautiful mountains and rivers, good weather and strange rains, soaked in the charm of the south of the Yangtze River, and condensed with generations of ingenuity.

Economic indicators continue to improve



Gross domestic
product of the city

1.88 trillion yuan

↗ **1.5%** (Year-on-year growth)

GDP per capita of permanent
population

152,600 yuan

Internationally recognized high income
1.74 times the national level





The inflow of talents ranks first in the country

Hangzhou introduces college students under the age of 35

364,000 people

Average age in the city

Life expectancy of the registered population

38.77 years old 83.63 years old

For many years, the net inflow rate of talents, overseas talents and Internet talents has remained the first in the country, and it has been selected as the most attractive Chinese city in the eyes of foreign talents for 11 consecutive years.

The digital economy is leading in the country



The added value of the core industries of the digital economy

507.6 billion yuan

Account for the whole province

56.5%

accounts for the city's GDP

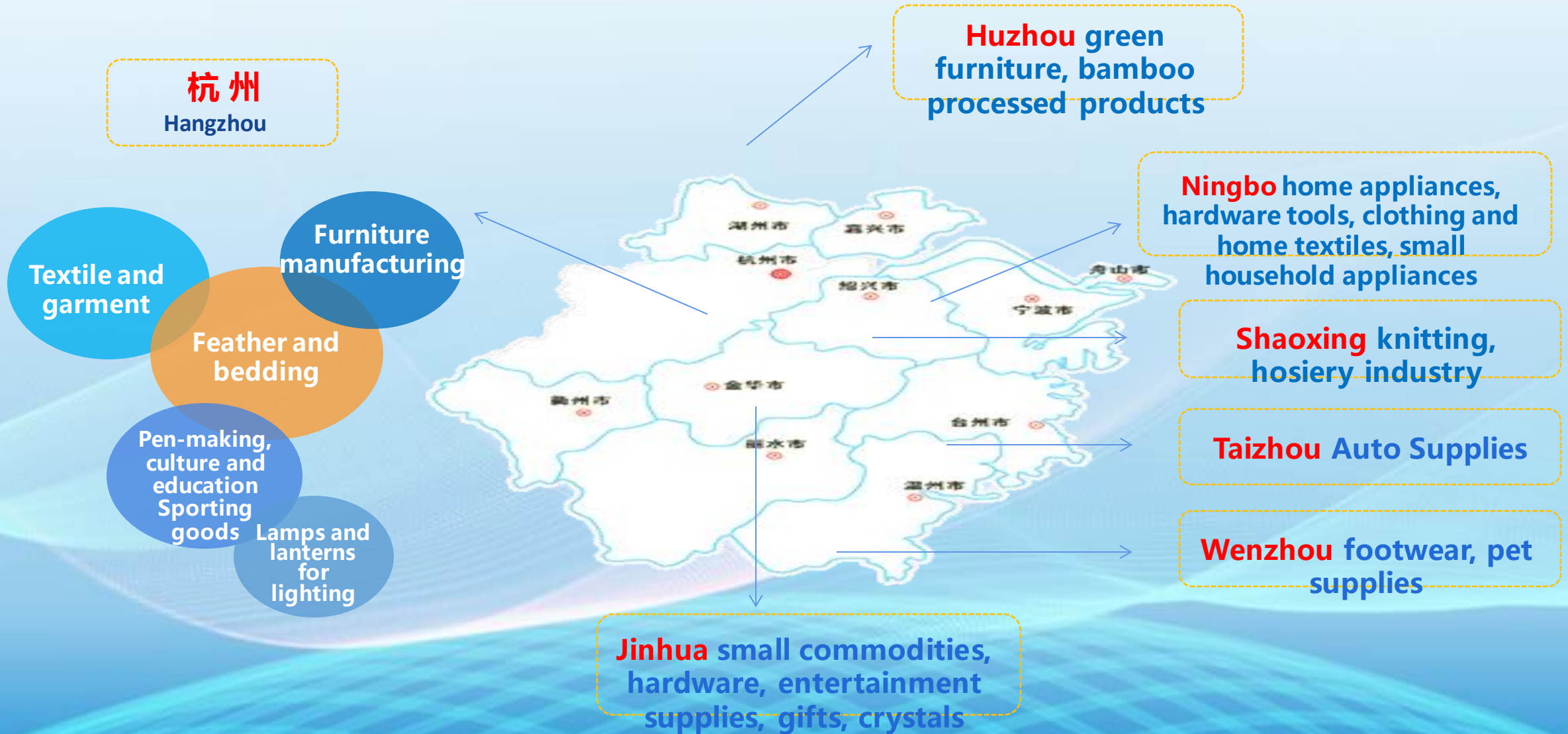
27.1%

Year 2022 data



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The industrial cluster is the best in the country





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There are more than **20** national
key specialized markets

There are about **200,000**
merchants

The business area is more than
12.3 million square meters

中国轻
纺城

嵊州中国领
带城

东阳中国
木雕城

中国塑
料城

中国茧丝
绸交易市
场

海宁中国
皮革城

杭州中国丝
绸城

杭州四
季青服
装市场

永康中国科
技五金城

湖州织里中
国童装城

中国杜桥
眼镜城

中国桥头
钮扣城

中国桐乡鞋
业皮革城

中国大唐袜
业城

桐乡濮院羊
毛衫市场

义乌小商
品城



There is a strong atmosphere of entrepreneurship and innovation

6

It has 6 national innovation and innovation demonstration bases

167

In 2022, there will be 1.678 million market entities in Hangzhou, of which 288,500 will be newly established, a year-on-year increase of 4.1%, with an average of 366 new enterprises per day

283

It has 283 listed companies, ranking fourth among the top 100 listed companies in China

8

8 companies are on the list of the top 100 unicorns in 2022



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The business environment is world-class

Utilization of
foreign capital

>\$7.8 billion

Foreign trade import and
export volume

756.5 billion yuan

It has attracted investment from 134 Fortune 500 companies

234 projects

Eight companies were listed in Fortune magazine

"2022 Fortune Global 500 Enterprises"

It has become one of the first batch of pilot cities for business environment innovation in China. 41 companies were listed in the "2022 Top 500 Private Enterprises in China", ranking first among cities in the country for 20 consecutive times.



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3

OUR PRACTICE

China's **first** cross-border e-commerce comprehensive pilot zone

Six systems and two platforms

The experience of cross-border e-commerce in Hangzhou, with "six systems and two platforms" as the core, has been replicated and promoted to the whole country by the executive meeting of the State Council for many times

Compiled into the "Memorabilia of the Communist Party of China in the Past 100 Years"

On the eve of July 1, 2021, the establishment of the China (Hangzhou) Cross-border E-commerce Comprehensive Pilot Zone was compiled into the "Memorabilia of the 100th Anniversary of the Communist Party of China"

The first level in the country "remarkable results"

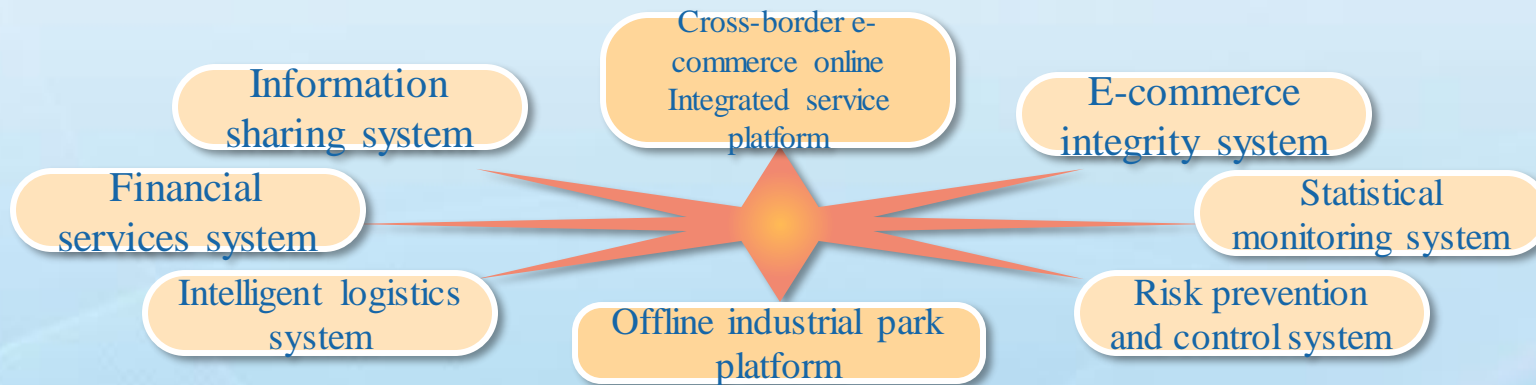
The Hangzhou Comprehensive Pilot Zone ranked first in the country in the "2021 Cross-border E-commerce Comprehensive Pilot Zone Evaluation" of the Ministry of Commerce of China, with "remarkable results"

A typical representative comprehensive test area that is open to the public

At the 5th and 6th Import Expo, Hangzhou Comprehensive Test Zone, as the only representative of the 165 comprehensive test zones in the country, was listed in the national exhibition area of the China Opening Up Achievement Exhibition.

It is a pioneer of cross-border e-commerce system innovation

"Six systems and two platforms"



The first cross-border e-commerce import and export return and exchange model,
The first global central warehouse model, the first digital customs clearance mode for imported personal belongings through delivery channels,
The first "bonded import + retail processing" model



A gathering place for cross-border e-commerce platforms

There are more than **60** platforms of various types, gathering two-thirds of the country's cross-border e-commerce platforms, and the annual export volume of Hangzhou's local cross-border e-commerce platform is about **413.8 billion yuan**, covering more than **200 countries** and regions, and serving more than 700,000 small and medium-sized enterprises.

Wish

Google

pingpong

one touch
一达通



AliExpress

贝贝
beibei.com



Paytm

亚马逊
amazon.cn



阿里巴巴
Alibaba.com

XX 连连支付
www.lianlianpay.com



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The headquarters of cross-border e-commerce sellers

There are **832** cross-border e-commerce enterprises above designated size, and **107** cross-border e-commerce listed enterprises, unicorn enterprises and quasi-unicorn enterprises

Cross-border e-commerce
import and export volume

120.333 billion yuan

Cross-border e-commerce
exports

↗ 100.855 billion yuan

20.68% (It accounts for the
proportion of the city's foreign trade)



Zibuyu Group was listed and became
the first cross-border footwear and
apparel stock in China



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Cross-border e-commerce service resource gathering place

14 offline parks and **12** cross-border e-commerce brand bases are developed in dislocation

Global Cross-border E-commerce Brand Research Center, Global Cross-border E-commerce Brand and Design Innovation Center, Global cross-border e-commerce brand operation center, national cross-border e-commerce industry belt live broadcast alliance

Overseas warehouse

335, with a total area of **7,147,600** square meters, The number and area account for **one-sixth** and **one-third** of the country, respectively

airline

Zhejiang's **first** fifth air right international cargo route, normalized operation of **20** international freight routes, Hangzhou's international cargo and mail throughput **ranks fifth** in the country

Cross- border payments

The annual cross-border payment transaction volume of Hangzhou's local cross-border payment enterprises is about **600 billion yuan**



1、共建全球跨境电商DTC创新中心

To co-build global CBEC DTC innovative center

2、联合阿里巴巴、高校共建跨境电商中国培训中心

To co-build the CBEC China training center with Alibaba and tertiary institutes

3、联合建设中国（杭州）跨境电商海外服务网络

To co-build China(Hangzhou) CBEC overseas

4、联合举办全球跨境创新创业大赛

To co-organize global CBEC innovation and entrepreneurship competition

5、邀请参加 第二届全球数字贸易博览会

invite them to take part in the 2nd digital trade fair.



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