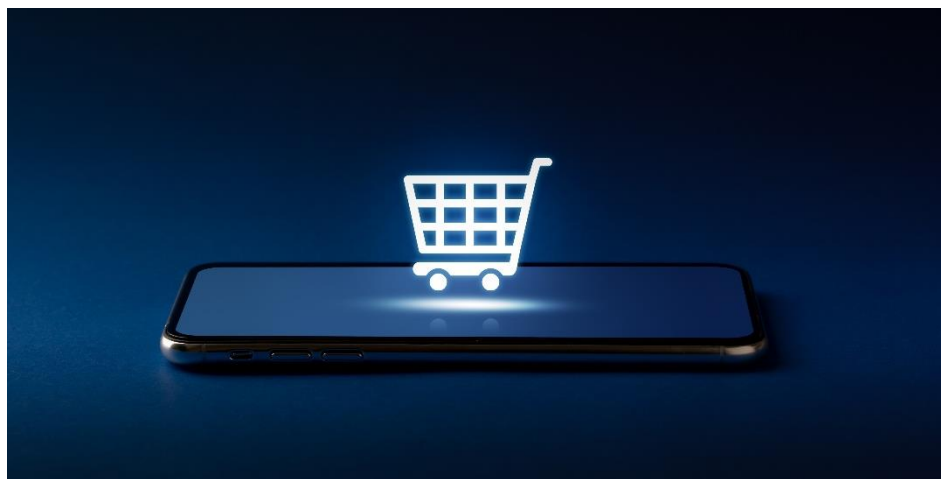


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I. Sector Review

Internet & E-commerce

Xiaohongshu's local lifestyle services to add 'leisure and entertainment' service category

On 4 July, Xiaohongshu (小红书) issued a notice soliciting opinions on revising the 'Xiaohongshu Local Group Buying Product Usage Standards.' The announcement shows that Xiaohongshu's local lifestyle services will add the 'leisure and entertainment' service category to all eligible merchants in the Chinese mainland, covering outdoor activities, exhibitions and performances, leisure and sports, and recreational activities. Merchants joining the platform need to provide relevant industry qualifications and business permits. The platform will waive entry deposits for merchants in the food and leisure and entertainment categories, and the technical service fee rate will be reduced from 2.5% to 0.6% until the end of 2025.¹

Meituan's daily instant retail orders exceed 120 million

As of 10:54PM on 5 July, Meituan's (美团) instant retail orders for the day exceeded 120 million, of which food delivery orders surpassed 100 million. 5 July was the first weekend after the start of the peak summer consumption season, and also the traditional promotional season for food delivery consumption. Last summer, Meituan's peak daily order volume exceeded 90 million.²

Douyin Mall upgrades low-price flash sale channel, focusing on industry belt products

Douyin Mall (抖音商城) recently upgraded its low-price flash sale channel. In terms of product supply, it has shifted from previous comprehensive brand coverage to focusing on quality products from industry belts, forming a differentiated competitive strategy with the Super Value channel. At the same time, the platform has launched the 'Direct from Origin · Super Flash Sale Week'. During the first 'Summer Cool Season' event (24-30 June), the flash sale channel achieved remarkable results, with overall daily average traffic increasing 131%, sales increasing 31%, and order volume increasing 41%.³

Taobao Flash Sale and Ele.me daily orders exceed 80 million

On 7 July, Taobao Flash Sale (淘宝闪购) and Ele.me (饿了么) recently announced that their combined daily orders exceeded 80 million, non-food orders exceeded 13 million, and Taobao Flash Sale's daily active users exceeded 200 million. Taobao Flash Sale officially launched on 2 May, with daily orders exceeding 40 million by the end of May and 60 million by the end of June. Within two months of launch, Taobao Flash Sale broke through 80 million daily orders. On 2 July, Taobao Flash Sale launched a 50-billion-yuan subsidy plan, significantly boosting consumer enthusiasm. The rapid growth of Taobao Flash Sale has also driven total market volume from an average of about 100 million orders per day in May to the current average of 200 million orders per day.⁴

Bilibili launches 'Codename H' AI tool for video podcasts

Video-sharing platform Bilibili (哔哩哔哩) is about to launch a series of support policies for video podcasts, as well as an AI tool named 'Codename H' to assist in video podcast production. This tool aims to help content creators transition from audio and text formats to video by automatically generating visuals based on audio and text input. Bilibili is working to attract podcast creators this summer, highlighting the potential for growth in video podcasts.⁵

JD Food Delivery: Nearly 200 restaurant brands achieve million-yuan sales in four months since launch, introduces 'Double Hundred Plan' to support quality merchants

JD Food Delivery (京东外卖) has now been online for four months, with nearly 200 restaurant brands achieving sales of over one million yuan on the platform. Luckin Coffee (瑞幸), Cotti (库迪), and Mixue Ice Cream & Tea (蜜雪冰城) became the first brands to break 100 million yuan in sales, while over 10 brands such as Chagee (霸王茶姬) and Tasiting (塔斯汀) achieved sales of over 10 million yuan. On 8 July, JD Food Delivery announced the official launch of its 'Double Hundred Plan', investing over 10 billion yuan to support more benchmark brands in achieving million-yuan sales. The platform will help more quality restaurant merchants achieve long-term online business growth through a 5A-level merchant service system including traffic support, marketing subsidies, bestselling product operations, premium delivery, and dedicated after-sales service.⁶

Taobao Flash Sale upgrades instant retail ecosystem by launching Freshippo section

The Taobao (淘宝) app recently added a Freshippo (盒马鲜生) section to its Flash Sale channel, marking a new integration within Alibaba's instant retail ecosystem. Taobao Flash Sale leverages Freshippo to expand instant retail from food delivery to fresh produce and all categories of daily consumption, building a more complete local lifestyle service ecosystem. Through Taobao Flash Sale's traffic hub, Freshippo can also reach more consumer groups and meet consumer demands for quality and efficiency.⁷

Taobao Flash Sale launches 'Ice Festival' with ice cream orders up 95% week-on-week

With the arrival of summer, demand for cooling and heat-relief products continues to grow. Taobao Flash Sale (淘宝闪购) recently invested 50 billion yuan in subsidies to boost consumption while launching the 'Flash Sale Ice Festival' event with various iced products and cooling gadgets. During the event, Taobao Flash Sale's ice cream orders increased 95% compared to the previous week, ice beverages increased 113% week-on-week (wow), ice alcoholic beverages increased 79% wow, and cold cup sales achieved 56% wow growth. Among merchants selling ice products, Meiyijia's (美宜佳) overall order volume increased 135% wow, Shihuike (拾惠客) increased 165% wow, Huilin PARKnSHOP (惠邻百佳) increased 92% wow, Huiyixuan (惠宜选) increased 122% wow, and Kuaikeda (快客达) increased 148% wow.⁸

JD Jingxi's first industry belt product selection centre lands in Yiwu

On 8 July, JD Jingxi's (京东京喜) first 'Factory Product Selection Centre' in China officially landed in Yiwu, Zhejiang. At the same time, the Jingxi self-operated business officially launched the 'Industry Belt Factory Product Selection Plan'. The Selection Centre will permanently display over 5,000 selected factory products available for users to order via QR code, while also having professional procurement teams working on-site locally to explore Zhejiang-sourced factory products, reaching nearly 300 million Jingxi self-operated users through JD Logistics. For merchants, the Selection Centre also provides full-chain services from business negotiations and product procurement to marketing placement, helping merchants reduce operational costs. Meanwhile, it will coordinate with various business departments across JD.com to offer multi-channel sales opportunities.⁹

Retail Logistics

JD Logistics upgrades tracking service, generating creative copy through self-developed LLM

JD Logistics (京东物流) recently upgraded its logistics tracking service, primarily combining roles, profiles, scenarios, and package transit situations to automatically generate personalized creative copy through JD.com's internally developed large language model (LLM) technology. It now provides consumers with more intelligent, humanized, and warmer logistics tracking services while still providing accurate delivery transit information. Currently, this service has been launched in over 20 cities including Beijing, Hangzhou, Xi'an, and Wuhan, with other cities forthcoming. This is also the first time in the express delivery industry that large language model technology has been introduced into logistics tracking scenarios.¹⁰

Supermarkets & Hypermarkets

Freshippo NB rebranded as 'Super Freshippo NB'

Freshippo NB (盒马邻里) brand has recently undergone some revamps. Fresh milk products in stores that were previously branded as 'Freshippo NB' have quietly had their packaging changed to read 'Super Freshippo NB'. Store staff confirmed that not only will the private brand logo be gradually replaced, but store signage will also be revamped. This change also marks a major strategic shift for Freshippo NB.¹¹

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