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# Benchmarking Analysis

# Chapter A - Benchmarking Analysis

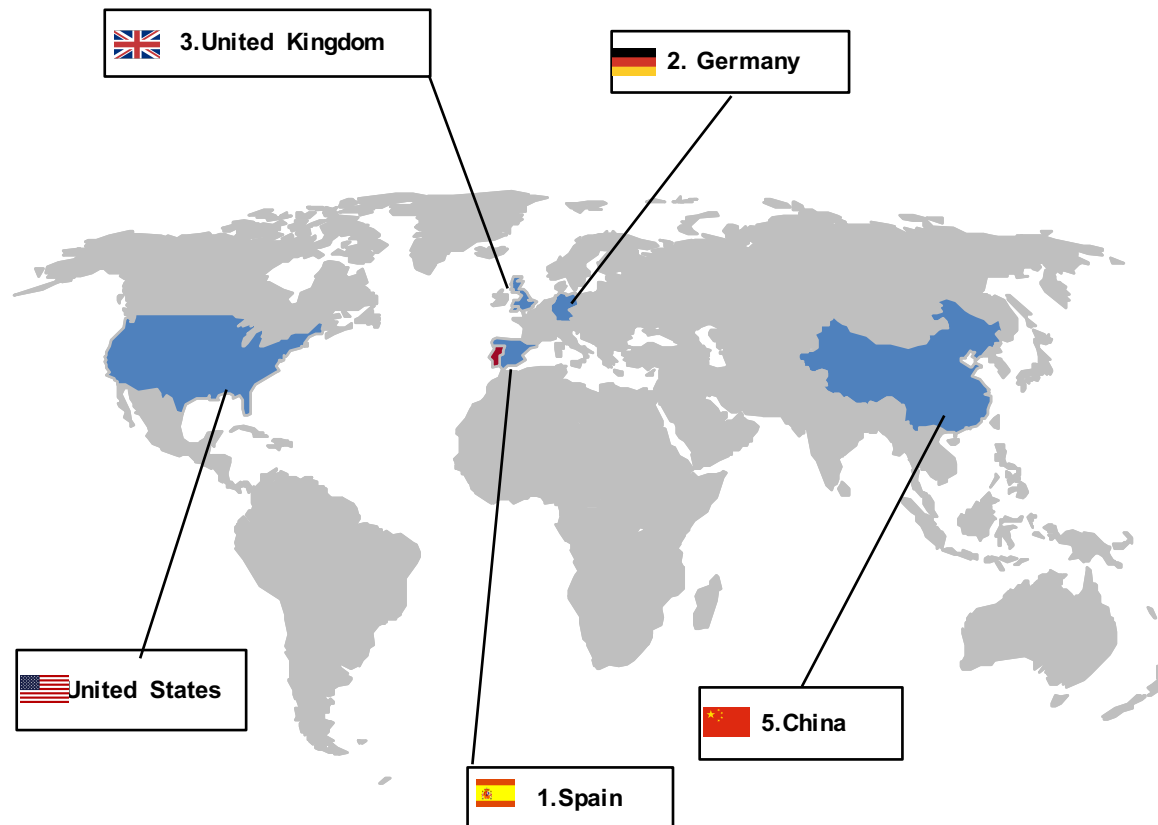
## Executive summary

### **A1** Benchmarking Analysis

- The benchmarking analysis allows to collect evidence from other markets, in this case, from other countries, to **better assess the situation and highlight the current trends.**
- The countries selection criteria was: strong Street Vending presence, organization of the markets and consumer behavior, Presence in rankings (eg. Daily News) and literature on the topic.
- The following countries were selected: **Spain, Germany, United Kingdom, USA and China.**
- Depending on the **state of development of the country, Street Vending takes different forms** – i.e., in China, there is a predominance of the unregulated selling, with the majority of sellers being low income class who have in Street Vending their primary source of income. In more developed countries, like the European ones, Street Vending is a tradition expressed in the weekly or monthly street markets, where a set of legislation exists and is strictly observed. On the other hand, in the USA, Street Vending (in the form of individual sellers with small carts) is an intrinsic part of the society and is highly regulated. Moreover, a trend in the European countries was identified – the street food. Young entrepreneurs are setting up food trucks to participate in street food fairs and events, and new associations are being set up to support this new sales channel.
- **Street Markets**, in all identified countries, are a successful type of business model

# Spain, Germany, United Kingdom, United States and China are real life examples where Street Vending is an everyday subject

World map target countries



## Benchmarking selection criteria:

- Strong **presence of concepts** of Street Vending
- Markets with **different structures and organizations**
- **Different types of cultures** and consumers behaviour
- Presence in rankings (eg Daily News) and literature on the subject



## Spain Facts



### Key facts and overview (2014)



#### Population

48.1 million



#### GDP per capita

\$ 30.262



#### Easiness of doing business ranking

33rd place



#### Starting a business ranking

74th place



#### City of Analysis

**Madrid** – the capital, which has a strong tradition of street markets. Other relevant cities – Barcelona, Zaragoza, Sevilla.

In Spain, Street Vending is very much focused in street markets – their sales volume is estimated to be 2,5 to 3,5% of total retail sales

### Street Vending in Spain

**38,250** licensed street vendors in Spain (2010)

- The number of Street Vending activities and street markets is underestimated, as they are frequently registered in the Trade Income Tax (IAE) at a provincial rather than at a municipal level (2011).

### Profile of Street Vending In Spain

- **Number of street markets:** between 3,500 and 4,000
- **Sales volume:** 2,5 – 3,5% of total retail trade sales
- **Trade Volume (2010):** 2,033.5 M€
- **Direct and full-time jobs:** 50,000 - Andalucía (21.2%), Comunidad Valenciana (15.6%) and Cataluña (11.8%), focusing in urban centres (91%). Also, 15% of full-time street vendors are gypsies (about 7,500).

### Economic Value of Spain's Street markets

- **38,250** licensed street vendors and **49,114** employees - According to the UPTA, this figure could reach 125,000 (one stall may be run by a family)
- According to the report "Non-sedentary selling in Spain" (1999), mobile selling in street markets on a regular basis represents around 95% of the total non-sedentary selling.
- **Average net profit** per street vendor: 12,000 Euros per annum and an actual benefit of 25% over the total costs.

El Rastro is one of the most famous street markets in Madrid, however, new kinds of markets have been emerging, like MadrEAT, a street food event.

## El Rastro

Always held on Sundays and holidays, in the neighborhood of La Latina, El Rastro is one of the most popular flea markets in the Spanish capital, being also one of the most known among tourists.



**MadrEAT** is a street food market held each third weekend of the month, in the center of Madrid. Live cooking shows, concerts and other activities complement the offer from the food trucks, that represent a wide variety of food and beverage products.



**Madrid Productores** is a monthly open-air market where food producers from the Madrid region show and sell their products, being also an opportunity for meetings between producers and consumers.

# Madrid Street Vending synopsis



## Population

3,16 million



## International annual visitors (2014)

4,54 million



## Number of street vendors

There are ~ 38 250 vendors in the country



## Market segmentation

### Punctual / Temporary Events-

Street food events, Festivals

**Daily Routine-** Street markets in different points of the city



## Concept

Small business owners or owners of stalls in the local markets



## Organization

Street markets with licensed vendors, street food events with mobile food trucks.



## Regulation

**Royal Decree** 1010/1985 – regulates non-sedentary Vending; **Local Corporations**, Act 7/1985

**What is missing** – municipal regulatory body that will allow street food trucks to sell in the street.

**Regulation entities-** European regulation N° 852/2004 – concerning hygiene of food products.

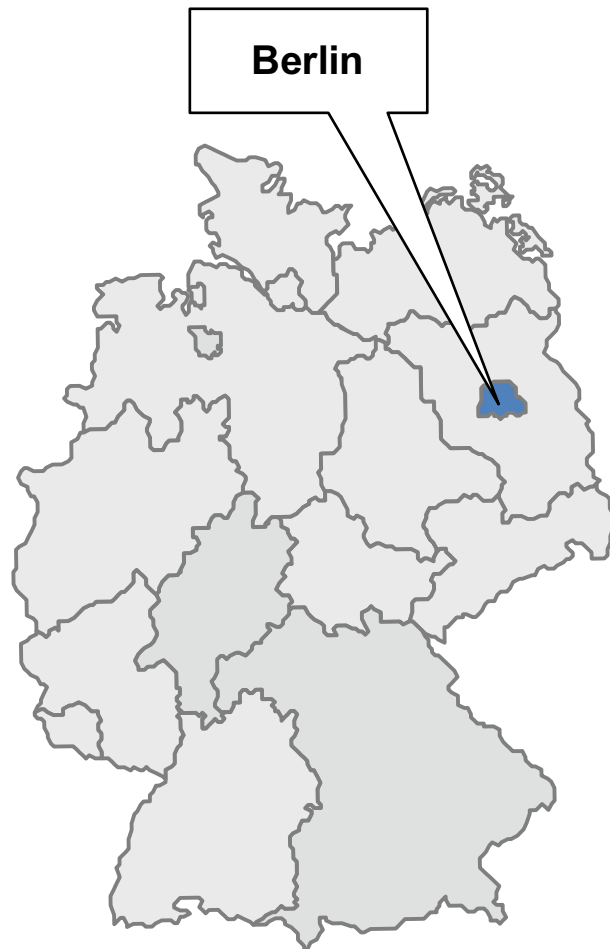
## Spain – Takeaways



- ✓ Street Vending has a moderate preponderance in Spain, and in particular, in Madrid, **mainly through established regular street markets**;
- ✓ Regulated market with a **system of licenses and permits** that obey to a certain organization;
- ✓ Currently, it is **missing specific legislation for the Street Food concepts**, a recent phenomena in the Street Vending market;
- ✓ The majority of the street vendors are **low-class income that have in Street Vending their main source of income** – however, a new generation is arising: the **young entrepreneurs** who set up their food trucks as new businesses;
- ✓ The most common goods sold are food, artefacts, and clothes.



# Germany Facts



## Key Facts and overviews (2014)



### Population

81 million



### GDP per capita

\$ 53.670



### Easiness of doing business

14th place



### Starting a business ranking

11th place



### City of Analysis

**Berlin** - Focused on temporary markets, specially known for the Christmas markets.

Other interesting Germany cities - Hamburg, Frankfurt, Nuremberg, Munich

# Berlin Street Vending events are focused on temporary markets mainly dedicated to food and beverages

## Street Vending segmentation

- Weekly markets
- Weekend flea markets
- Street fairs and Festivals
- Christmas markets

**There are over 634 markets in Berlin**

## Illustration of street markets focus on the food sector

| Type                                                                                                                         | Definition                                                                                                                                                                                                                               |
|------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  <p><b>The Weekly Market</b></p>           | <p>Tuesdays, Fridays and Saturdays, this market sells <b>locally sourced and seasonal products such as fruits and vegetables</b>. The portfolio ranges from fruits and vegetables to bakery goods and meat products over to flowers.</p> |
|  <p><b>The “Street Food Thursday”</b></p> | <p>Established in 2013 offers food from all around the globe, which <b>attracts over 10,000 visitors</b>. The project was awarded with the title of being the <b>gastronomic innovator of 2013</b></p>                                   |
|  <p><b>The “Culinary Cinema”-</b></p>     | <p>Established in 2007, <b>shows movies that deal with food, pleasure, and the environment</b>. After the screening the movie experience is accompanied by a top chef’s menu at the Gropius Mirror Restaurant</p>                        |

# The Street Vending market has its own regulation with emphasis in the food sector

## General Regulations

- Street Vending is usually executed in private spaces i.e. old industrial areas and parking lots
- Public areas for Street Vending are available during weekends with limitations and heavily regulated
- Food trucks and other Street Vending channels have to have a **transient merchant license**
- Transient merchant license issued by the district authority (max. stay at one location 6 weeks) allows to move to different locations and daily assembling and dismantling (cost: €60)

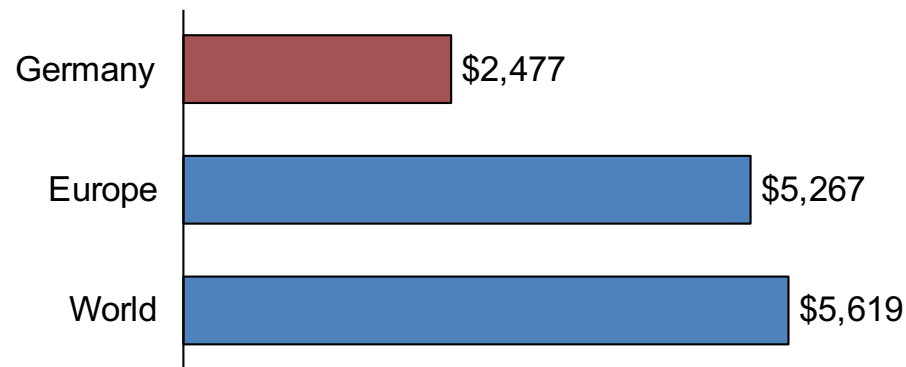
## Permits for operating businesses handling food

- **Food handler's permit** (red card) issued by the local public health department (cost: €400-3,000)
- **Health department certificate of inspection** issued by the veterinary and food authority (implementation of the Hazard Analysis Critical Control Point – concept)
- IHK-seminar on food hygiene regulation (optional)

# Christmas markets are one of the most outstanding events in Germany representing a huge success in worldwide comparison

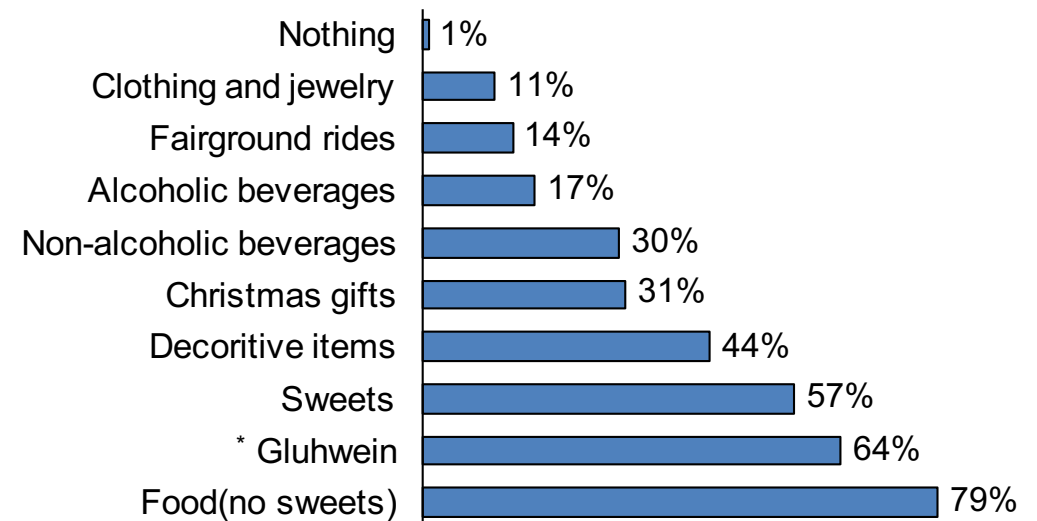
**Christmas Markets** - There are over 150 Christmas markets in Germany celebrating seasonal customs and traditions in historical settings where street vendors offer a vast variety of items.

Estimated revenue in worldwide Christmas markets [in millions of euros; 2014]



Germany has the biggest representation worldwide in Christmas markets. Last year **€2.477 million euros were spent in Christmas markets.**

Consumer choices at Christmas markets [in %; 2014]



**Only 1% of the market visitors leave without buying something.** German consumers tend to spend more in food than any other product.

\*Gluhwein is a traditional German hot alcoholic beverage; wine

# Berlin Street Vending synopsis



## Population

3.5 million



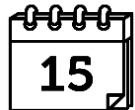
## International anual visitors

11.33 million (2014)



## Number of street markets

There are ~634 markets in Berlin



## Market segmentation

### Punctual / Temporary Events-

Weekly markets, Weekend flea markets, Street fairs, Festivals, Christmas markets



## Concept

Small business owners and known brands



## Organization

Street Vending is usually executed in private spaces. Public areas for Street Vending are available during weekends, heavily regulated



## Regulation

Documents: Transient merchant license  
Food handler's permit; Health department certificate of inspection

**Regulation entities:** Police, public health department, road traffic licensing department

## Germany – Takeaways

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- ✓ **Street markets are preponderant in Germany**, and one of the most emblematic events is the **Christmas Market**
- ✓ Vendors are both **small business owners and innovative brands** who use the street as a sales and marketing channel during the market's special events
- ✓ **Regulation sets possible locations and demands specific documents** for the Street Vending practice
- ✓ Vending is focused on food



## United Kingdom Facts



### Key facts and overview (2014)



#### Population

64.6 Million



#### GDP per capita

\$ 40.443.2



#### Easiness of doing business

9th place



#### Starting a business ranking

50th place



#### City of Analysis

**London** – City with great presence of street markets as New Covent Garden Market or Piccadilly.

In the UK there are 23 000 street vendors, most of whom are men

### Street Vending In UK

**23 000** The total number and street traders and assistants in the UK  
(2014) . <sup>1</sup>

### Vendors Profile

- Age profiles do vary among markets however most of them vary **from 30 to 59** years of age (74%)
- The large majority of traders (81%) are men.

### Goods Sold

- Primarily **fruit and vegetables, households good, textiles and prepared food.**
- There are also market (Specialized one's) that sell art & crafts antiques or second hand goods

### Consumers Profile

- **52% of the consumers are female and 48% male.**
- 64% of customers visit at least 1 market per week (69% of them travel by foot or bus)
- Domestic and foreign tourists due to the atmosphere, the experience and variety. <sup>2</sup>

Street Vending is segmented into 5 categories which have different characteristics such as regulation and goods sold

### “Street Vending” segmentation

| Types of markets          | Definition                                                                                                  | Who regulates                                                                                                                                     | What do they sell                                             | Examples                                               |
|---------------------------|-------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------|--------------------------------------------------------|
| <b>Street market</b>      | Any regular market taking place outside on a street.                                                        | Around three quarters of these markets in London are regulated by <b>local authorities</b> , with the remaining having <b>private operators</b> . | Households goods, clothes & accessories, fruit & vegetables.. | Queen's Market                                         |
| <b>Specialist markets</b> | Markets specialized in <b>particular goods</b>                                                              | Not defined                                                                                                                                       | Art & crafts, clothes, antiques or second hand goods.         | Bermondsey Square market (antiques)                    |
| <b>Farmers' market</b>    | The term Farmers' market is often used quite broadly to describe <b>markets selling high quality food</b> . | These markets are accredited by <b>FARMA - National Farmers' and Retail Markets Association</b> - which has strict accreditation standards.       | Quality food                                                  | Wimbledon and New Convent Garden                       |
| <b>Specialist food</b>    | Markets other than farmers' markets selling speciality food.                                                | Not defined                                                                                                                                       | Specially food                                                | Sutton of Camden (Queen's Crescent)                    |
| <b>Covered market</b>     | Any market with a dedicated permanent <b>roof covering</b> .                                                | Not defined                                                                                                                                       | Households goods, clothes & accessories, fruit & vegetables   | Camden Lock (Stables); Wood Green; Hampstead Community |

Street Vending is subject to fees, depending on the type of market and goods sold.

Average daily pitch fee.

| Market                                       | Type       | Average daily pitch fee |
|----------------------------------------------|------------|-------------------------|
| Camden Passage*                              | Specialist | £20                     |
| Chapel Market                                | Street     | £ 9 - 11                |
| Camden Lock*                                 | Specialist | £15 - 45                |
| Queens Crescent                              | Street     | £15                     |
| Portobello Road (Good Fairly Antique Market) | Specialist | £50 (Saturday)          |
| Portobello Road                              | Street     | £ 6,5 - 17              |

The **pitch fees reflect the relative commercial value of different markets**. Markets specializing in particular goods (e.g. Colombia Road, Camden Passage or Camden Lock) are able to charge higher fees. Average daily pitch fee in a Specialist market costs 33,3 pounds and in a Street market 12,25 pounds.

# New Covent Garden and Piccadilly are great examples of successful street markets



New Covent Garden Market is the UK's leading wholesale market for fresh fruit and vegetables. With over 200 businesses, employing over 2,500 people, supplies 40% of fresh fruit & vegetables eaten outside of the home in London and is used by 75% of London florists.

**The Fruit & Vegetable Market** and the **Flower Market's** wholesalers trade from Monday to Saturday.

**Special events: British Flowers Week** run from Monday 15 June to Friday 19 June 2015. <sup>1</sup>



*Piccadilly*  
MARKET

A vibrant and charming market in the heart of London, with over 60 stall holders. Piccadilly dedicated to selling an eclectic and unique range of food, arts, crafts, antiques, collectables, complementary therapy goods, cosmetics and clothing from around the world.

**The Food Market** is open Monday, **Antiques and Collectables Market:** Tuesday,; **Arts and Crafts Market:** Wednesday to Saturday. <sup>2</sup>

# London Street Vending synopsis



## Population

8.6 Million



## International anual visitors

There were 16.8m overseas visitors to London in 2013.



## Market segmentation

**Daily Routine-** New Covent Garden Market; Borough Market; Camden Market (which includes Camden Lock Market and Stables Market)

**Once a week** – Brick Lane and Columbia Road are open only on Sunday.



## Concept

Most often there are small business owners. But It depends on the market that is been considered.



## Organization

**Documents: Licenses** - The licensing authority is defined by the Local Government.



## Regulation

Street trading in the City of London is regulated by the Corporation under the City of London Various Powers Act 1987.

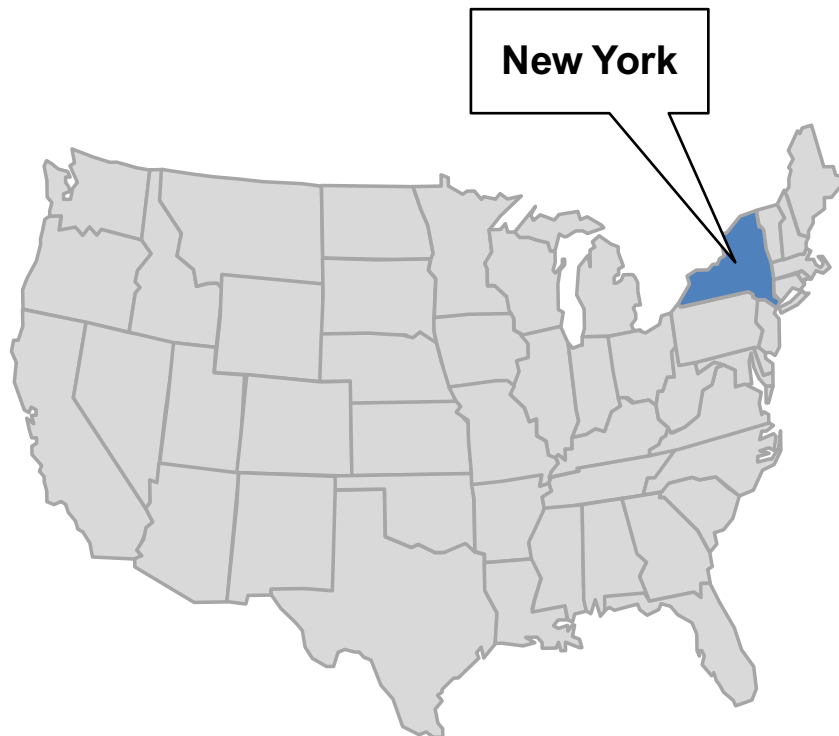
## United Kingdom - Takeaways



- ✓ Street Vending is, by definition, segmentated into **5 types of market** including both outdoor and indoor markets
- ✓ Depending on the goods sold higher fees can be charged
- ✓ **There are different rules for every zone**, and even for **different times of the year**, and no licenses or permits to vend are needed;
- ✓ The majority of the street vendors are male citezens
- ✓ The most commom goods fruit and vegetables, households good, textiles and prepared food



# United States Facts



## Key Facts and overviews (2014)



### Population

318.9 million



### GDP per capita

\$ 5.629.5



### Easiness of doing business

7th place



### Starting a business ranking

41th place



### City of Analysis

**New York-** clear street market segmentation and organization.

Other interesting U.S. cities- Indianapolis, Los Angels, Seattle, Chicago

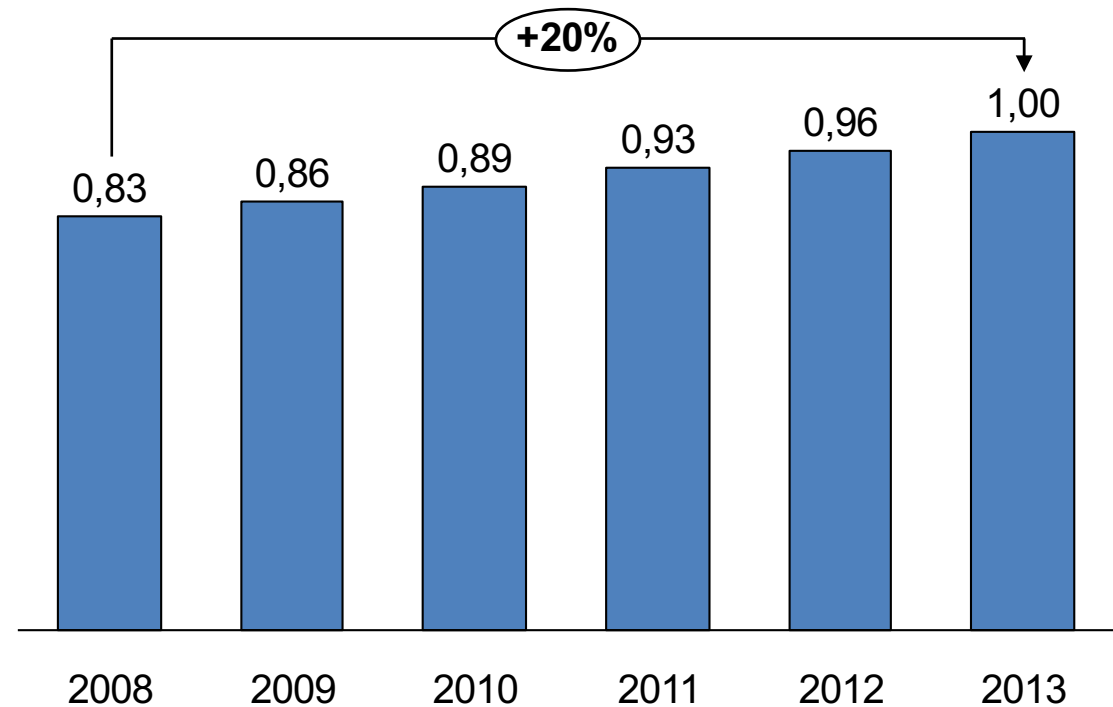
# Street Vending has long been part of the urban landscape in the United States and has been growing throughout the years

Currently there are over  
**20 000 Street Vendors in New York**



Street Vending has provided business to countless entrepreneurs over the past years.

Revenue of street vendors in the United States from [2008-2013; in U.S. billion dollars]



In six years the Street Vending market revenue increased in 20%

# In the streets of NY daily vendors are divided in five types providing all sorts of products

## Market segmentation of daily routine Street Vending

|                                                                                     | Type                       | Definition                                                                                                                                           | Weight (%)                                                                               |
|-------------------------------------------------------------------------------------|----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|
|    | <b>Food</b>                | Products: meals, vegetables, hot dogs, ice-cream, candy<br>Require a table, cart, or truck to vend the items that they sell.                         | 59    |
|    | <b>General Merchandise</b> | Products: T-shirts, bags, scarfs, perfume, necklaces<br>umbrellas, cellphones accessories                                                            | 4     |
|   | <b>Veteran</b>             | General vendors who, since 1894, have specific regulation to ease doing business.                                                                    | 7     |
|  | <b>1st Amendment</b>       | Products: books, newspapers, CDs, paintings, photographs<br>and any form of visual art. Protected by freedom of speech<br>under the First Amendment: | 4   |
|  | <b>Unlicensed</b>          | Sell all products without the necessary requisites (Permits,<br>licenses                                                                             | 25  |

# Temporary events are another segment of Street Vending and contribute to the city life for consumers, brands and small business owners

## Market segmentation temporary events

| Type                                                                                                                                                                                               | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  <p><b>Weekend Flea Markets</b></p>                                                                               | <p>Each flea market has a distinct way of operating and a distinct <b>criteria of vendors participation</b>, i.e.: <b>seniority, consumer based diversity</b>. They take place in a variety of spaces from <b>old banks</b> like the Brooklyn Flea to <b>cafeterias</b> like in the GreenFlea –<b>closed doors</b></p>                                                                                                                                                                                           |
|   <p><b>Holiday Markets</b></p> | <p>Markets happening in specific periods, holidays or festival occasions i.e.: <b>Holiday Shops at Bryant Park</b> -125 shops, <b>some reflecting brick-and-mortar stores</b>. Offer jewellery, clothing etc. and it also includes an ice skating ring. Date: Nov. 1-Jan. 5. <b>Union Square Holiday Market</b> -150 vendors in red-and-white-striped tents scenario at the Union Square, selling handmade ornaments and jewellery also with the presence of known brands and shops. Date: Nov. 21 - Dec. 24</p> |
|  <p><b>Street Fairs</b></p>                                                                                     | <p>Takes place on the road where food and merchandise vendors line the streets selling all types of items. Are day long events happen In large avenues (5-10 blocks). Streets are temporarily pedestrianized. <b>Vendors pay a fee to participate and part of the money goes back to the non-profit community organization and the city</b>. In 2010 there were 321 street fairs. i.e.: <b>Ukrainian Festival in the East Village, the Queens Art Express, and Atlantic Antic in Brooklyn</b></p>                |

Vendors have a substantial amount of rules and constraints upon their business, and there are 5 000 workers selling illegally on the streets

The majority of street vendors are small business owners and have strict regulations upon their business.

Unlicensed vendors account for 25% of all street vendors, there at least **5 000 people working illegally on the streets of New York**

### Regulation entities

- City Council
- Department of Consumer Affairs
- Department of Health and Mental Hygiene
- Sanitation Department
- Department of Environmental Protection
- Department of Parks and Recreation
- Police Department
- Finance Department

### General Regulations

In NYC since 1981 the City Council imposes a long standing **limit on the number of street vendor permits**. There have been **3,000** of such permits from which only 850 are available for non-veterans.

**Sellers need a license to sell on the street and a permit to sell food.**

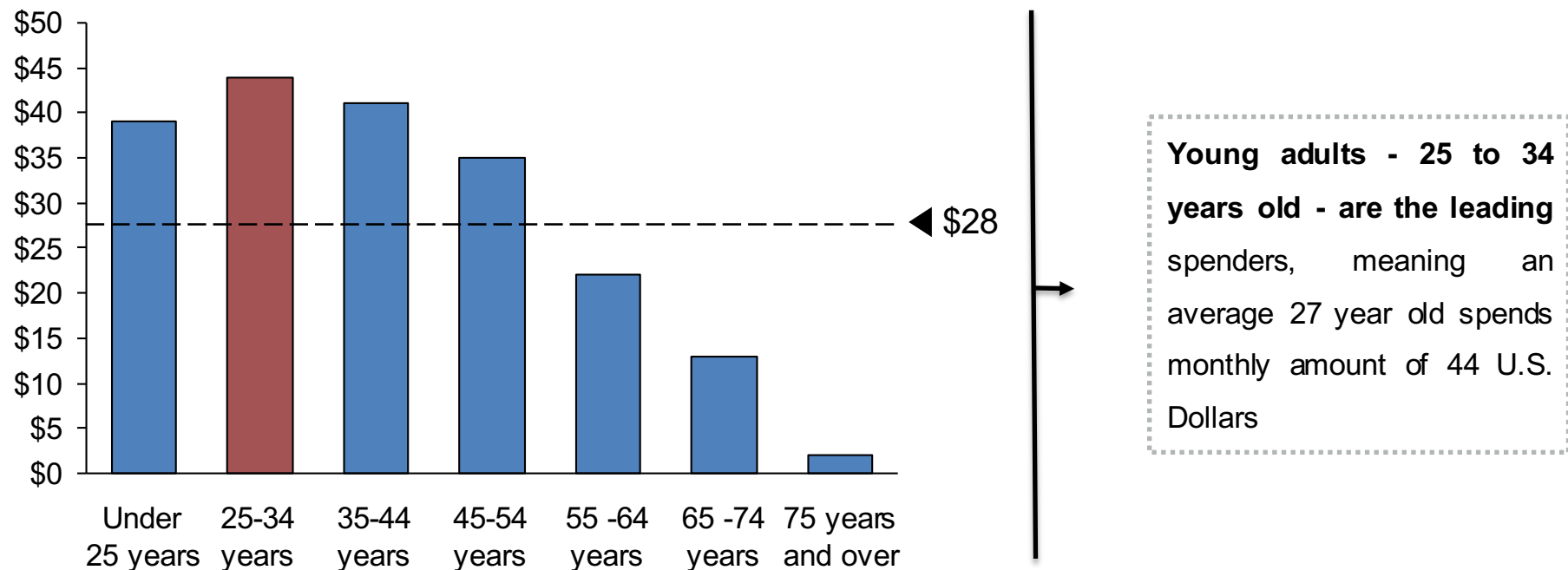
A Permit is sticker a card the each street vendor receives after DOH's inspection.

Vendors have to read **29 pages of text restrictions** in order to find a legal street to vend.

Furthermore they may only sell in streets with more then 3,7 m wide and must be 3 meters away from cross walks, 6 meters from doors.

# Consumers are spending more on the streets and technology seems to have a role in this

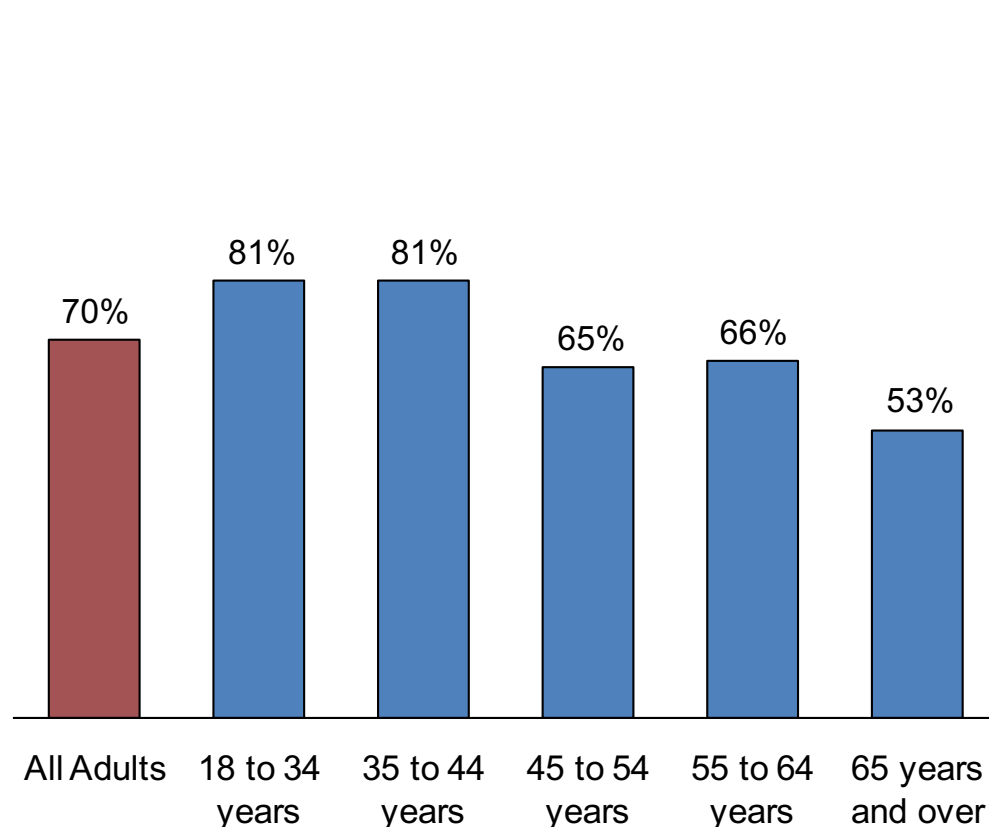
Average monthly consumer spending on street food snacks from mobile vendors [2008;in U.S. dollars]



Conventionally, food trucks and carts were very working class. Nowadays the concept has been adopted by the middle class as a legitimate way to buy and sell food. New technology has been a big game changer especially in the food sector, allowing trucks to pick up and move to where customers are on short notice. By using devices such as **Facebook and Twitter, and several apps** food trucks have created a sense of “being in the know.”

# Street Food has become a trend, more and more consumers would like to see their brands/restaurants on the streets

Share of consumers who would visit a food truck of their favorite restaurant, by age group [2014; 1,012 respondents]



**The share of consumers who would patronize a food truck of their favorite restaurant is very high – 70%.**

There seems to be a high interest from the consumer perspective to surpass the gap in the market, to be able to take their favorite restaurant food on the run of a busy day or in the comfort of a walk on the streets.

# New York Street Vending synopsis



## Population

8,5 million



## International annual visitors (2014)

11,86 million



## Number of street vendors

There are ~ 20 000 vendors in the city



## Market segmentation

### Punctual / Temporary Events-

Flea markets, Street fairs, Festivals

### Daily Routine- NYC Street Vendors



## Concept

Small business owners – Informal economy.



## Organization

Some areas and streets are interdicted. In overall each segment has it own special set of rules and legislation to follow.



## Regulation

Documents: **License-**to vend on the street;  
**Permit-** to sell food. General Rules: 3 meters from cross walks, 6 meters from doors

**Regulation entities:** Consumer Affairs; Health and Mental Hygiene; Sanitation; Environmental Protection; Parks and Recreation; Police; Finance

## United States – Takeaways



- ✓ Street Vending is extremely organized and it is divided in two sectors: daily and punctual / temporary events.
- ✓ Some closed door events are considered Street Vending.
- ✓ **Daily routine vendors are divided in 5 segments**, each with its particular characteristics
- ✓ **Severe** legislation with substantial amount of rules **decreases the easiness of starting the Street Vending business** and maintaining it legal
- ✓ **Different rules are applied depending on the type of goods sold**
- ✓ The restriction **in the limitation of the number of permits and licences** drives people to the black market and to sell illegally without the necessary inspections and without paying any taxes
- ✓ Organized citizens have begun to fight for the right of having more permits and educate the new business owners to understand respect the laws



# China Facts



## Key Facts and overviews (2014)



**Population**  
1.403 million



**GDP per capita**  
\$ 7.589



**Easiness of doing business**  
90th place



**Starting a business ranking**  
128th place

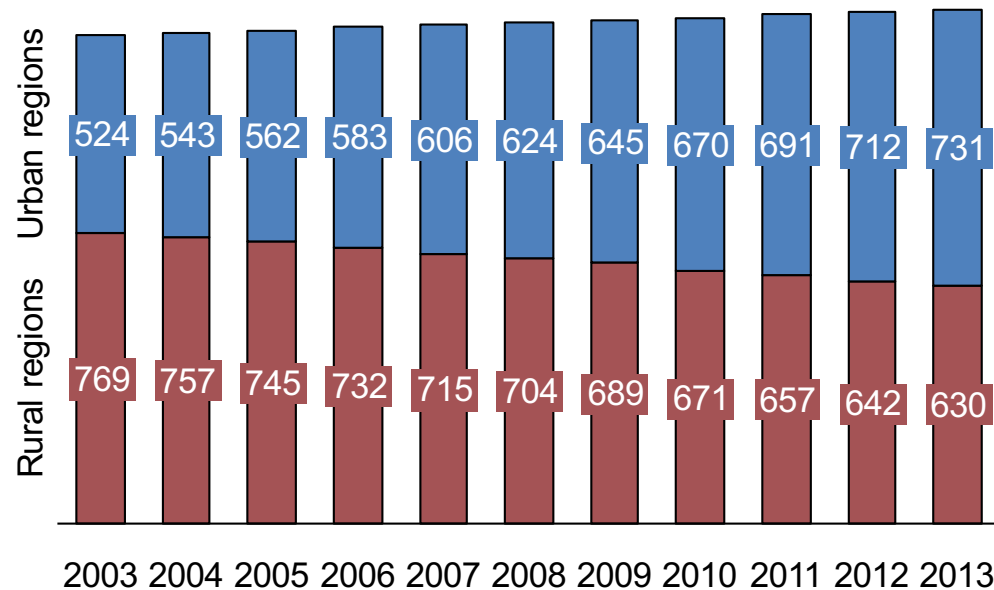


**City of Analysis**

**Guangzhou** – Typical developing country deregulated market, Street Vending in its pure state

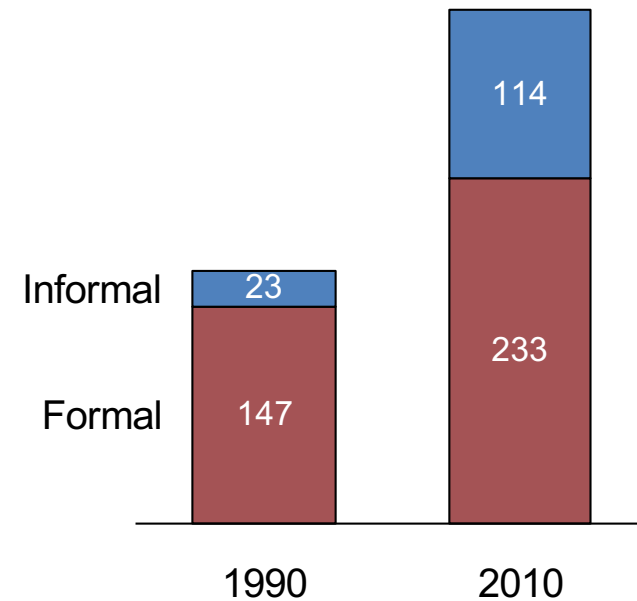
China's massive migration has fueled urbanization and caused the rise of informal work to almost half the total of formally employed people.

Urban and rural population of China (2003 – 2013 in millions)



Urban population grew almost 40% from 2003 to 2013

Number of people employed in urban areas in China (1990, 2010)



The proportion of urban informal employment grew from 13.6% to 32.8% (+90.7 million people)

Street vendors are one of the most common occupations in China and become central part of urban streetscapes

### Street Vending in China

**19.5 M** urban street vendors in China (2011)  
407,000 in Guangzhou

### Vendors Profile

According to survey  
in Guangzhou

- **92.5% are migrants.** Most of them **unregistered**. There are some unemployed local citizens or laid-off-workers, and also college students.
- In many places migrants **cannot get licenses**, making the very practice of Street Vending **illegal**
- Most of them **from 18 to 40** years of age
- Education level **below senior high school**
- **Women sell goods** preferentially while **men cook**

### Goods Sold

- Primarily **fruit, textiles** and **prepared food**
- Also include **paper products** for everyday use, **ornaments, toys** and **electronic items**.

### Consumers Profile

- **Low-income residents** who prefer the cheapness of the goods
- White-collar workers, undergraduates
- Domestic and foreign tourists who endorse these vendors for convenience and due to the novelty

Under the new policy framework, the definition of the (in)formality of Street Vending hang on where it is located rather than whether it is licensed by law

| Guangzhou Area                                                                                                                                        |                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                         |                                                                                                                                                                         |
|-------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| “Let it be”                                                                                                                                           |                                                                                                                                                                                                                                                                                                          | “Off-limits”                                                                                                                                                                            |                                                                                                                                                                         |
| Spaces where local authorities take a “let it be” approach creating spaces of tolerated illegality in which vendors can operate freely                |                                                                                                                                                                                                                                                                                                          | Local authorities have a “clear it away” or “zero tolerance” policy which keeps migrants and Vending out.                                                                               |                                                                                                                                                                         |
| Permitted Vending places                                                                                                                              |                                                                                                                                                                                                                                                                                                          | Prohibited Vending areas                                                                                                                                                                |                                                                                                                                                                         |
| 120 permitted Vending places with an area of 90,338 m2 and providing 8607 stalls; on average, each place has an area of 753 m2 and provides 72 stalls | District level: <ul style="list-style-type: none"> <li>83.3% in outlying districts</li> <li>16.7% in central city districts</li> </ul> Sub-district level: <ul style="list-style-type: none"> <li>53% in old neighborhoods</li> <li>29% in urban villages</li> <li>18% in other public spaces</li> </ul> | CBD, administrative center, commercial plaza/streets, tourist attractions, waterfront, sport center, exhibition center, city parks, airport and traffic stations (train, motor, subway) | During the Asian Games time in 2010, consisting of 145 main roads, 56 key areas and 49 sites around stadiums; after 2010, consisting of 148 main roads and 82 key areas |

\*“In-between” areas: Grey areas, increasingly contested and branded by clashes between local authorities and migrants

# Guangzhou Street Vending synopsis



## Population

14 million



## International annual visitors

9 million



## Number of street vendors

There are ~ 407 000 vendors in the city



## Market segmentation

**Daily Routine** - Flea markets,  
Guangzhou Street Vendors



## Concept

Small business owners – Informal economy



## Organization

Regulated by area – each area has its own rules enforced by the local authorities



## Regulation

Documents: **No permits needed**

**Regulation** - Local authorities – Police; Health and Hygiene department; Sanitation

## China - Takeaways



- ✓ Street Vending has a great preponderance in the China streetscape as the **19,5 million of street vendors** demonstrate
- ✓ **Deregulated market** where local authorities impose their will and strength;
- ✓ There are **“let it be” zones** and the ones where the sale is not allowed - **“Off-limits”**
- ✓ The majority of the street vendors are migrants seeking for a source of income, Street Vending is mostly necessity-driven and a way of subsistence;
- ✓ The most common goods sold are food and textiles