《阿里和腾讯向实体零售商发起100亿美元的争夺战》

你是站阿里巴巴还是站腾讯？

Above: Customers queue to pay as they shop at a Carrefour supermarket in Wuhan, Hubei province on December 3, 2011.

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(Reuters) — China’s tech giants Alibaba Group Holding and Tencent Holdings, worth a combined $1 trillion, are on a retail investment binge, forcing merchants to choose sides amid a battle for shoppers’ digital wallets.

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Since the start of last year, the two companies have between them spent more than $10 billion on retail-focused deals, boosting their reach online and in brick-and-mortar stores.

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The aggressive drive, supported by large cash piles and soaring share prices, is part of a battle to win over consumers and store operators to the two firms’ competing payment, logistics, social media and big data services.

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The result: fewer and fewer retailers left without allegiance to either Tencent or Alibaba.

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“All of the retailers in the brick-and-mortar world are very worried.They have to take a side,” said Jason Yu, Shanghai-based General Manager of market research firm Kantar Worldpanel.

“??????????????????????????????????Jason Yu??“??????????”

“Otherwise they are afraid they will be eaten alive in the future.”

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Alibaba is China’s top e-commerce player and its affiliate Ant Financial leads in mobile payments.Tencent’s strengths lie in social media, digital payment and gaming.It also has a major stake in the second-largest online retailer, JD.Com.

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Tencent and JD.com have a growing range of allies, including French grocer Carrefour, which has announced a potential investment from Tencent, and U.S. retail giant Walmart, which has a stake in JD.com.

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Tencent also bought a stake in Yonghui Superstores, apparel retailers Vipshop Holdings and Heilan Home, mall operator Wanda Commercial, and this month snagged a strategic tie-up with grocer Bubugao.

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In the other corner is Alibaba, which has invested even more heavily in Suning.com, Intime Retail, Sanjiang Shopping Club, Lianhua Supermarket, Wanda Film and IKEA-like home improvement store Easyhome.

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Key to the battle is China’s nearly $13 trillion mobile payment market, where Alibaba and Tencent are going head-to-head.Alibaba took a 33 percent stake in its payment affiliate Ant Financial this month ahead of an expected mega IPO.

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Ant operates China's top mobile payment platform, Alipay, while Tencent's payment system on its hugely popular Weixin chat app is catching up fast.Both firms are also making a big push in cloud computing and data.

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"I think for payment (the retail push) is a very critical part because it's almost a gateway," said Yu.Brick-and-mortar stores in China account for about 85 percent of retail sales, creating a huge lure for tech giants.

"?????????????????????????????????"Yu???????????????85%??????????????????

"That's the pot that Alibaba, JD.com and even Tencent want a slice of," Yu added."That's the majority of the business where they can actually look for future growth."

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In return, the physical stores get access to payment systems, logistics networks and other services — not to mention the reams of data on consumers that the tech firms control.

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Alibaba invested $486 million this month in a retail-focused big data firm, saying the deal meant it could better "help brick-and-mortar retailers succeed in the digital age."

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