a CTR Service in China

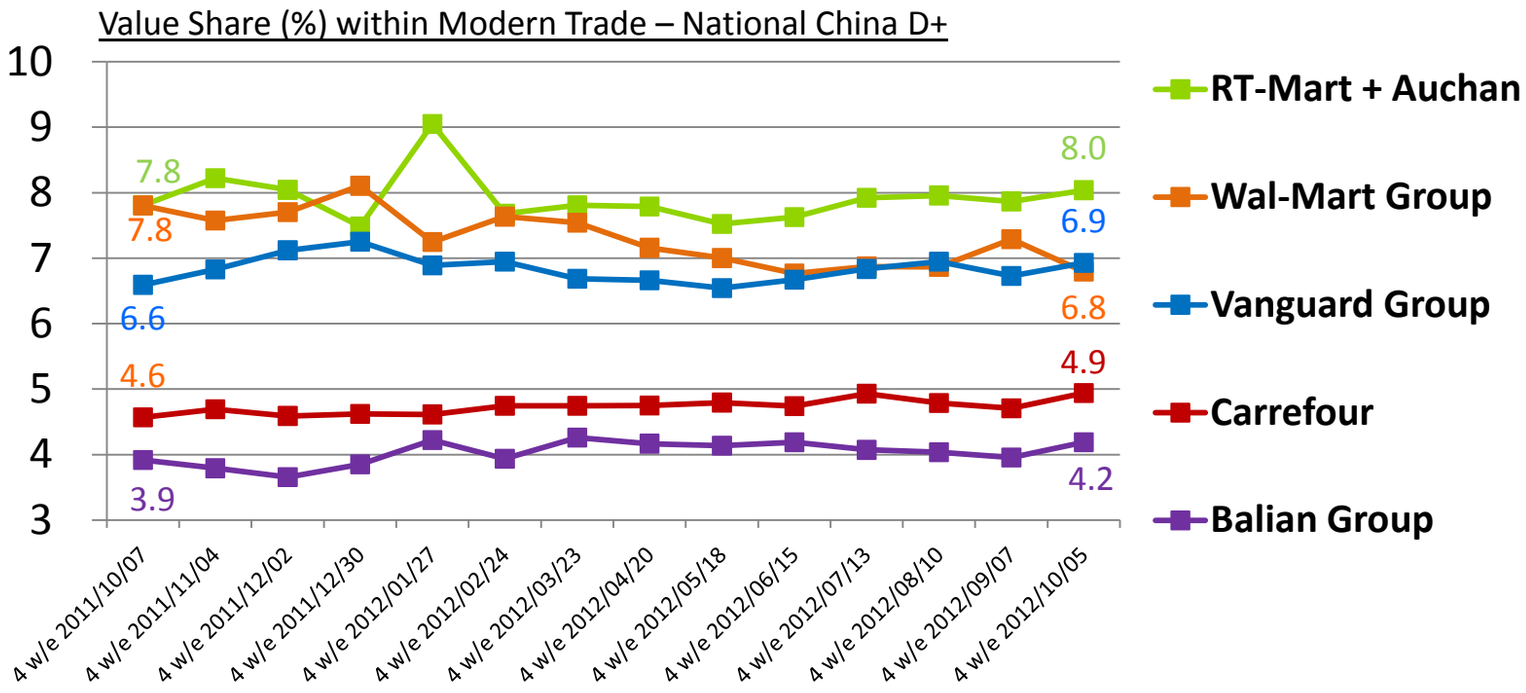
KANTAR WORLDPANEL

# Retail Snapshot

November 2012

## 4 week share tracking of top 5 retail groups

Value Share (%) within Modern Trade – National China D+




**4 of the 5 key players see share growth during the run up to Golden Week**

## 12 week KPI performance vs. last year for top 5 groups

12 w/e P10 2012 vs 12w/e P10 2011: Penetration vs Trip Spend vs Frequency – National China D+

| | More Shoppers? | Higher Value Baskets? | More Trips? |
|---|---|---|---|
| 大潤發 RT-MART / Auchan | 14.5% +3.1% | 85 RMB +7.3% | 4.5 trips -1.9% |
| Walmart 中国 | 15.7% -2.6% | 85 RMB +6.0% | 3.7 trips -7.4% |
| 华润万家 vanguard | 11.7% +1.0% | 80 RMB +5.3% | 5.1 trips +0.3% |
| Carrefour | 10.8% +0.1% | 90 RMB +13.0% | 3.5 trips -3.2% |
| 百联集团 BAILIAN GROUP | 7.4% -4.3% | 76 RMB +10.2% | 5.0 trips +0.9% |

**RT-Mart/Auchan group is experiencing healthy growth through attracting *more shoppers* as well as increasing shoppers *basket value***

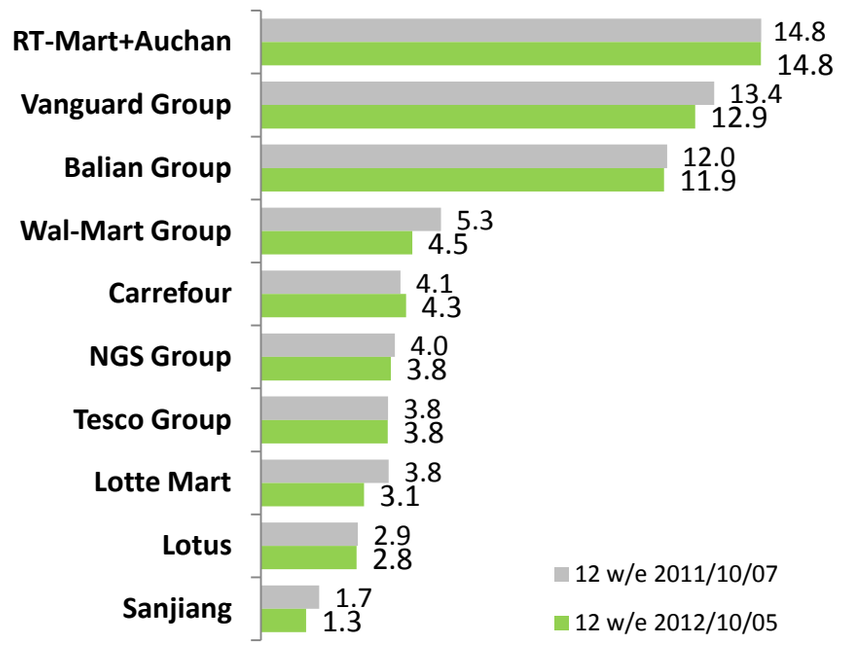
**Shoppers basket value is increasing across the top 5 retailers as shoppers *buy larger packs* and *up trade to more premium products* across many FMCG categories**

**Carrefour seeing share growth in all regions in the last 12 weeks except the South where Yonghui continue to grow their presence.**

### East

Retail Share by Top 10: East

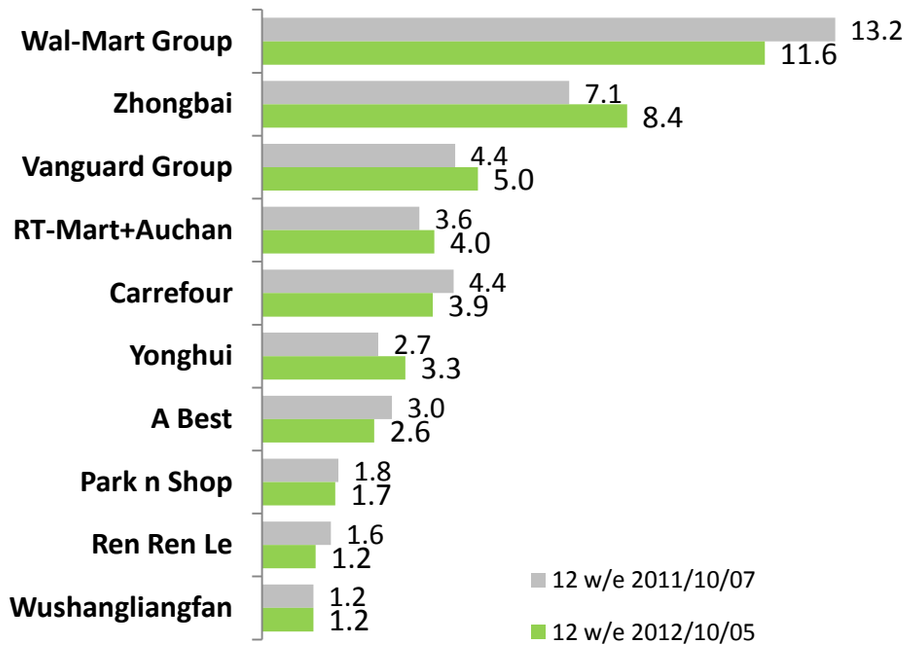
Value Share (%) – East




### South

Retail Share by Top 10: South

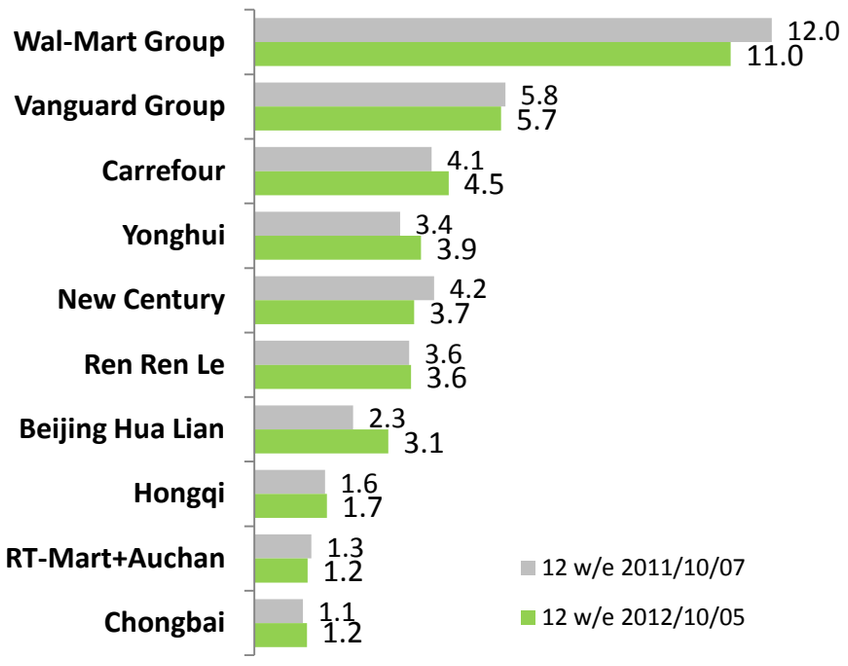
Value Share (%) – South




### West

Retail Share by Top 10: West

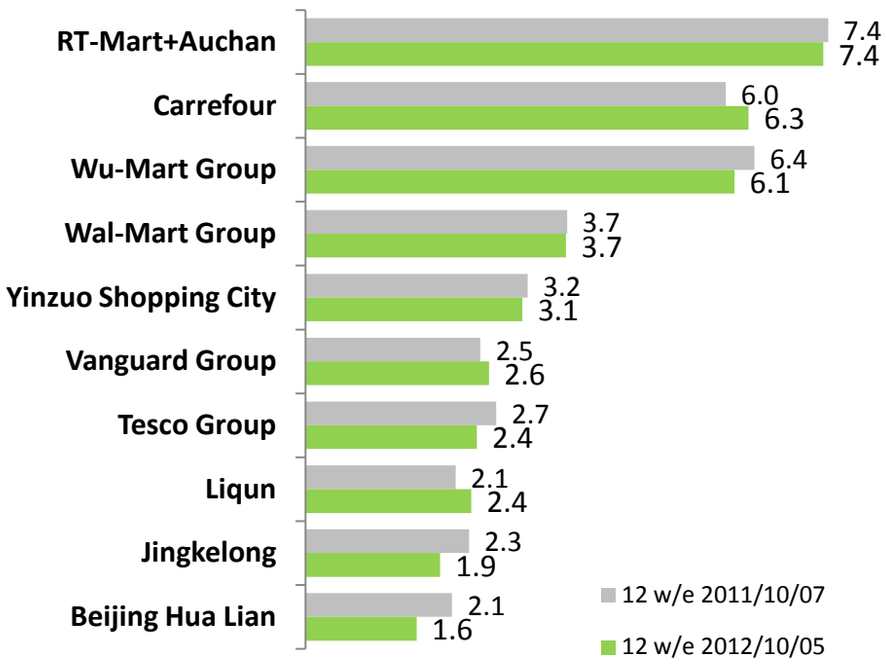
Value Share (%) – West




### North

Retail Share by Top 10: North

Value Share (%) – North




**Data Source: Kantar Worldpanel China - Based on FMCG Market**



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