a CTR Service in China

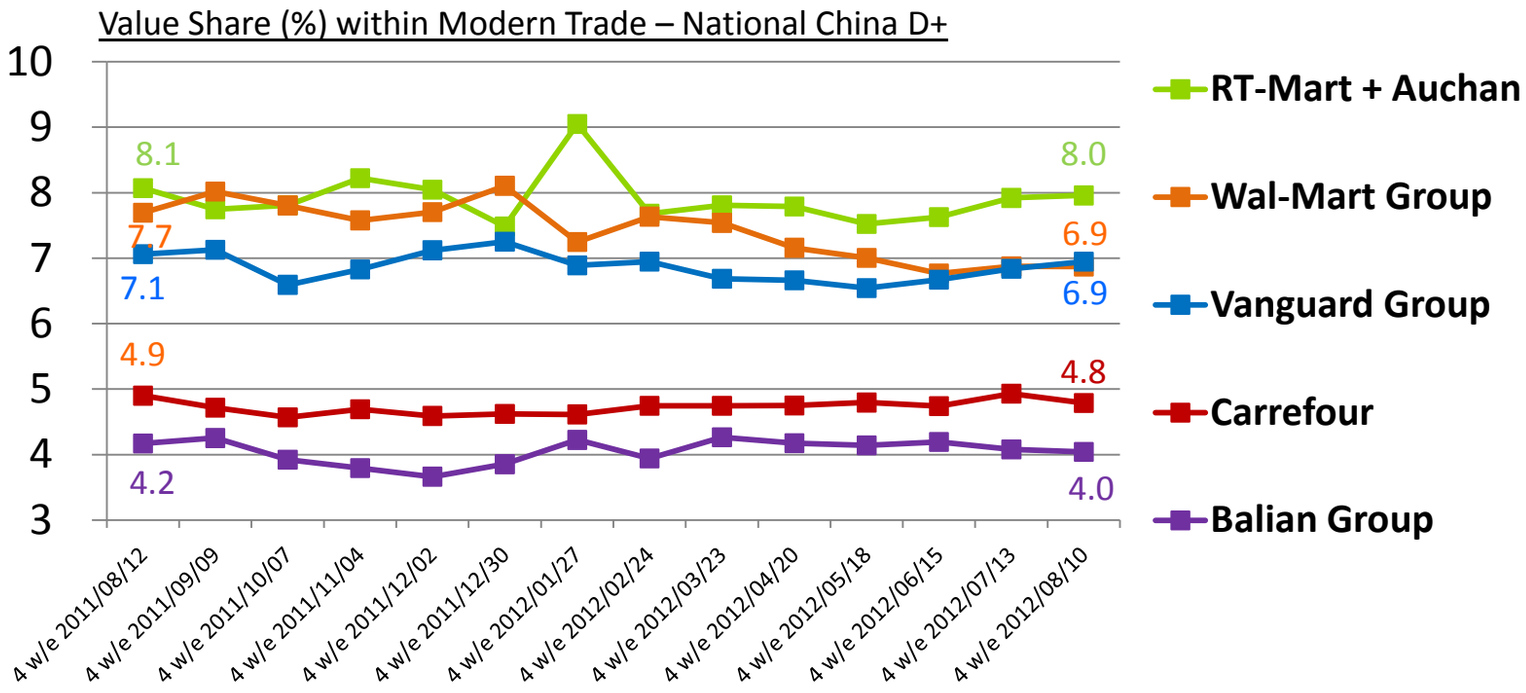
KANTAR WORLDPANEL

Retail Snapshot

September 2012

4 week share tracking of top 5 retail groups

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



All top 5 retail groups lose share position in latest month driven by stronger performance from smaller players

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

12 w/e P8 2012 vs 12w/e P8 2011: Penetration vs Trip Spend vs Frequency – National China D+

	More Shoppers?	Higher Value Baskets?	More Trips?
大潤發 RT-MART / Auchan	14.3% +0.7%	80 RMB +7.8%	4.6 trips -2.1%
Walmart 中国	15.5% -4.1%	80 RMB +5.4%	3.7 trips -3.4%
华润万家 vanguard	11.7% -0.3%	76 RMB +8.4%	5.1 trips -1.7%
Carrefour	11.1% +3.8%	83 RMB +7.3%	3.5 trips -0.8%
百联集团 BALIAN GROUP	7.5% -10.1%	73 RMB +15.1%	5.0 trips -1.4%

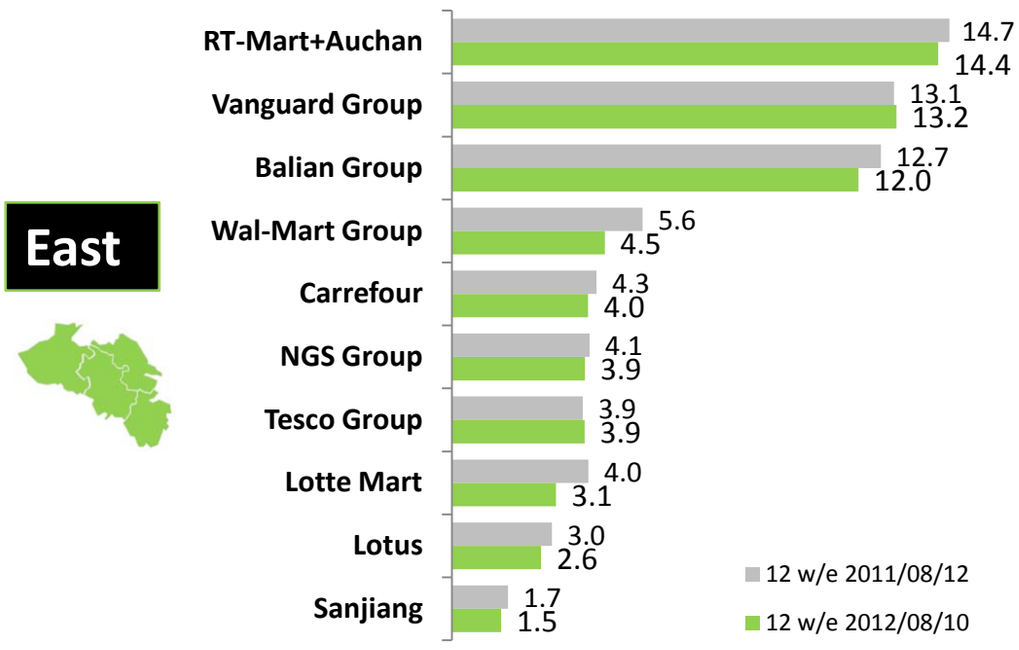
Carrefour and RT-Mart/Auchan Group attracts *more shoppers* as well as increased basket spend while Walmart and Balian group seeing declining penetration

Frequency declining for most of the key stores as shoppers increase their basket spending with the Wal-Mart group seeing the most significant decline

Wal-Mart performance driven by share losses in the South where Zhongbai and Yonghui have gained a stronger foothold

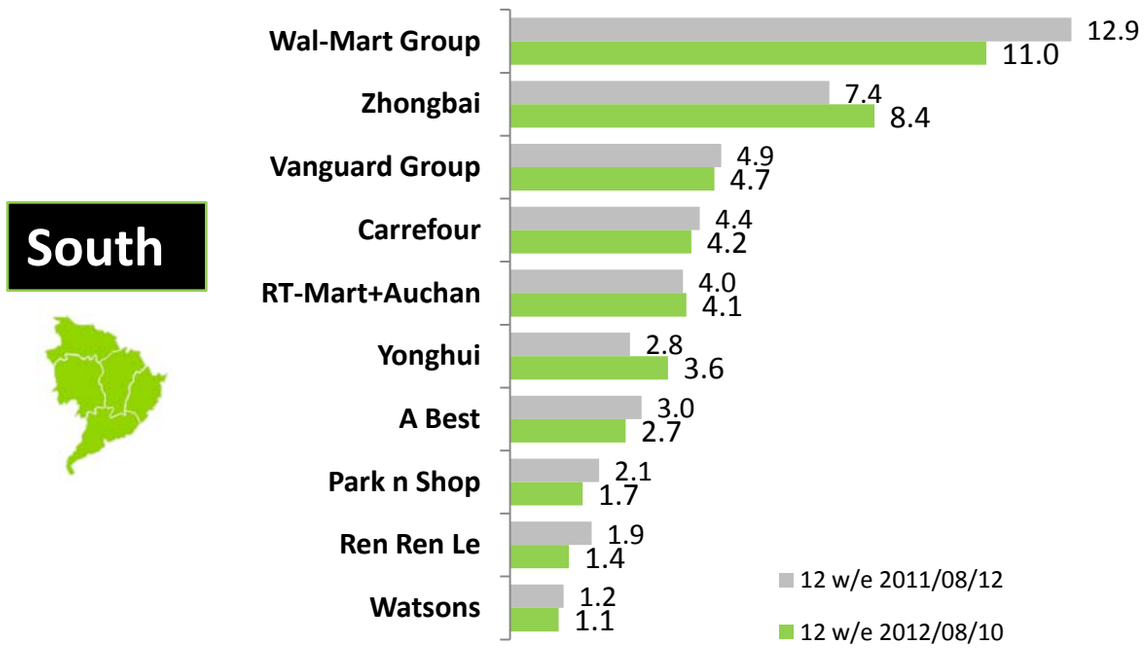
Retail Share by Top 10: East

Value Share (%) – East



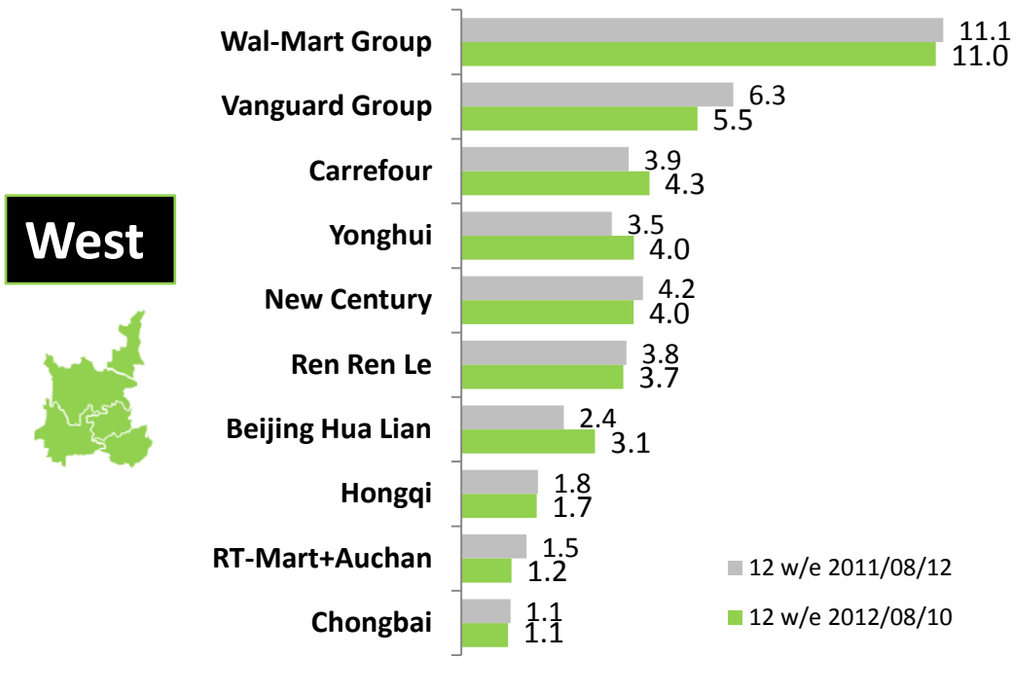
Retail Share by Top 10: South

Value Share (%) – South



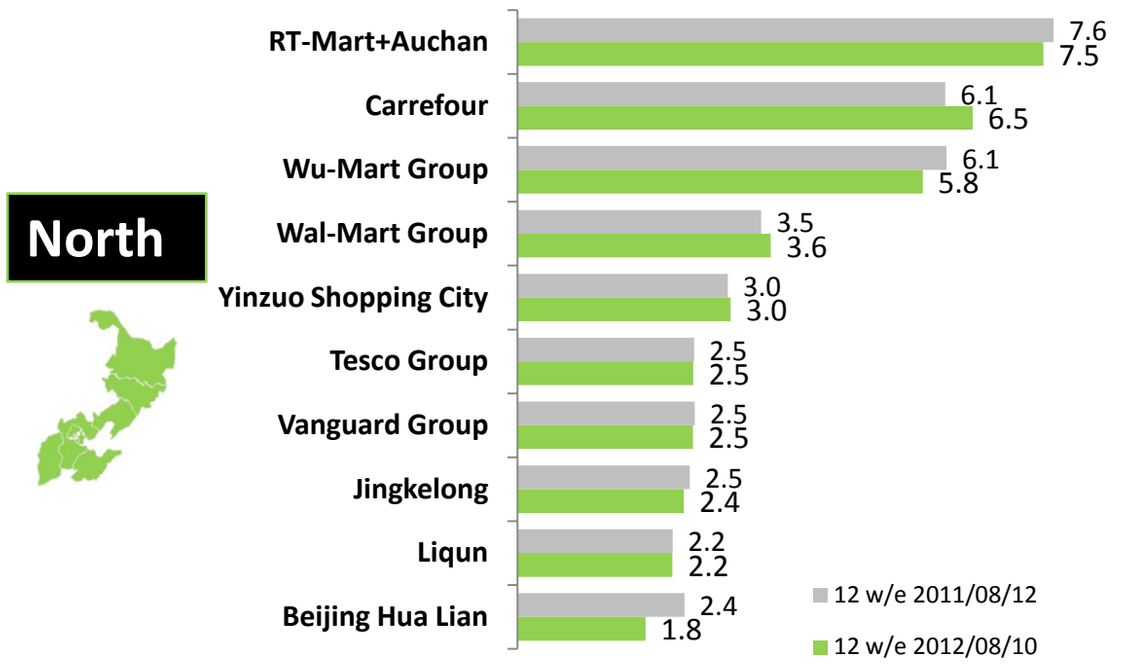
Retail Share by Top 10: West

Value Share (%) – West



Retail Share by Top 10: North

Value Share (%) – North



Data Source: Kantar Worldpanel China - Based on FMCG Market

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