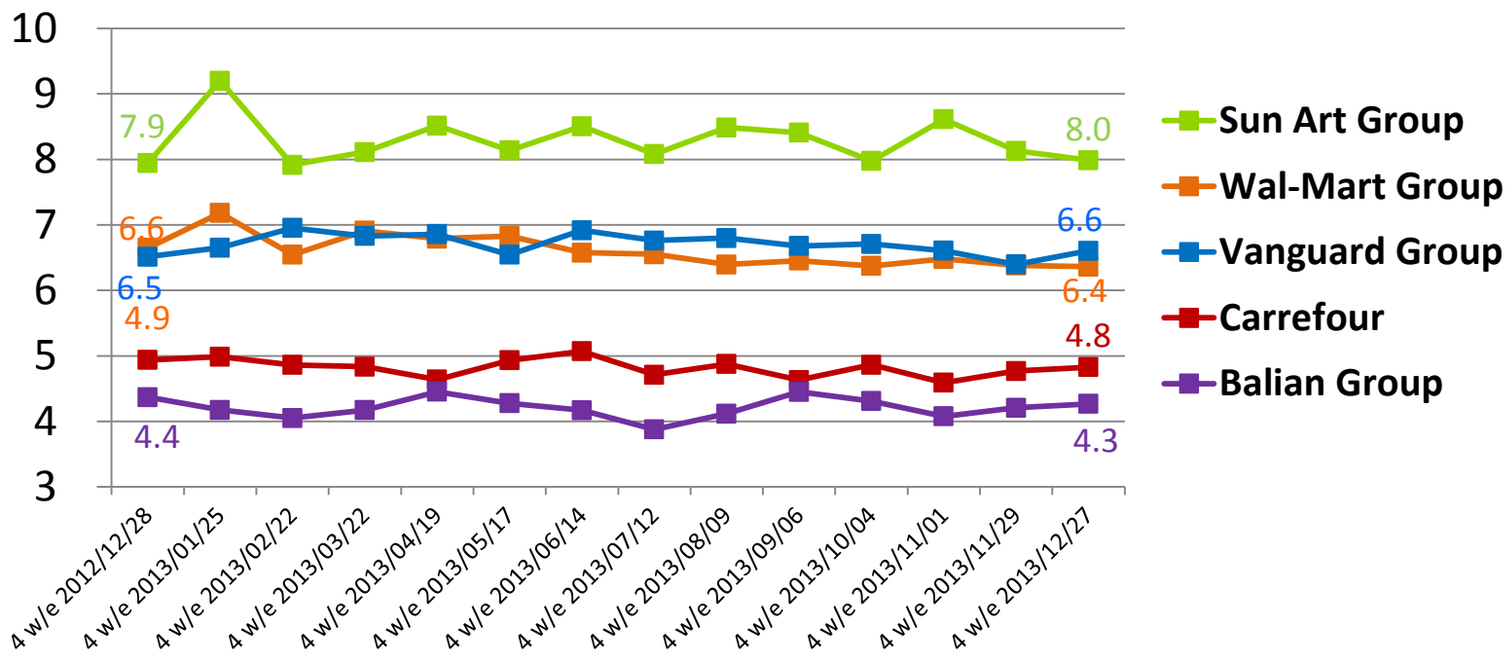
KANTAR WORLDPANEL a CTR service in China

Retail Snapshot

Feb 2014

4 week share tracking of top 5 retail groups

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



Vanguard Group reestablishes they lead over the Wal-Mart Group whilst the Sun-Art Group sees a 2nd period of share decline.

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

12 w/e P13 2013 vs 12w/e P13 2012: Penetration vs Trip Spend vs Frequency – National China D+

	More Shoppers?	Higher Value Baskets?	More Trips?
大潤發 RT-MART / Auchan	15.1% +3.1%	89 RMB +3.8%	4.2 trips +0.1%
Walmart 中国	14.8% +0.6%	87 RMB +0.2%	3.4 trips -3.1%
华润万家 vanguard	11.6% -1.5%	81 RMB +4.3%	4.7 trips -1.2%
Carrefour	11.0% -4.0%	87 RMB +0.7%	3.4 trips +1.1%
百联集团 BAILIAN GROUP	7.2% -6.1%	83 RMB +6.5%	4.8 trips +1.2%

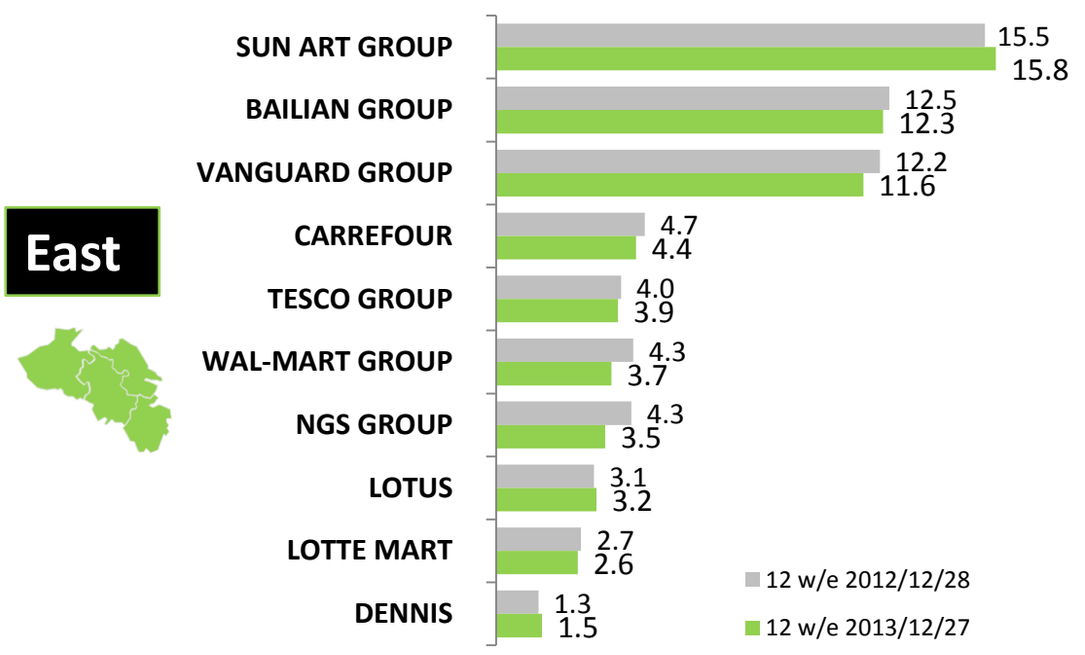
In the last 12 weeks most retailers have been more reliant on *higher baskets value* as a source of growth as opposed to attracting *more shoppers*.

Retailers continue to struggle to grow the *number of trips* as shoppers increase their visits to other channels such as e-Commerce.

Local retailers continue to see a strong performance particularly Yonghui in the North and BuBuGao in the South.

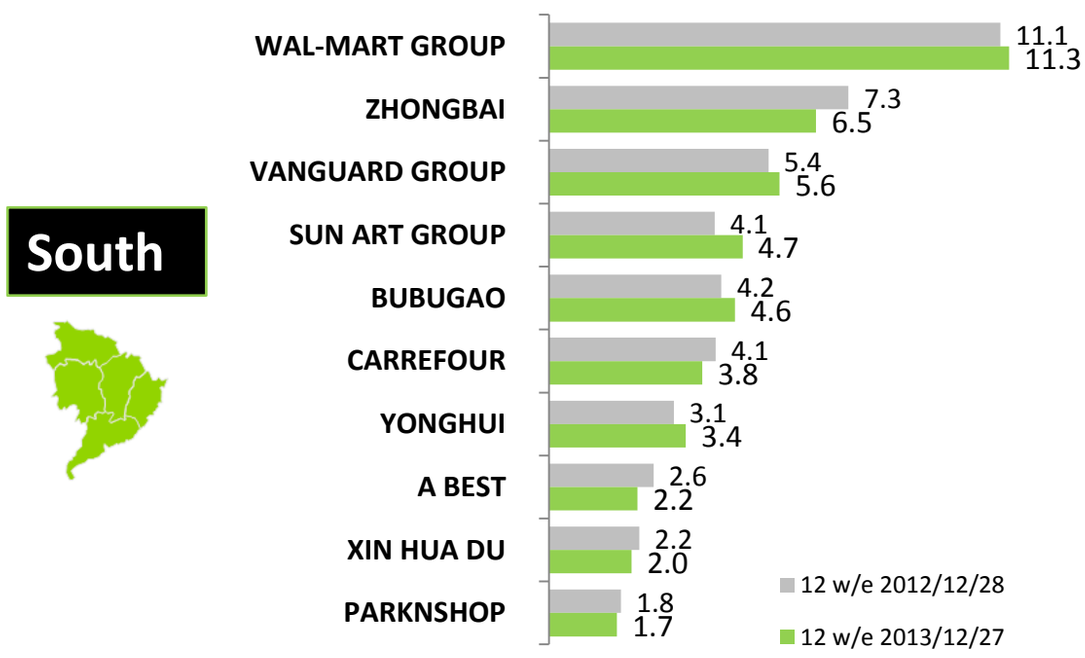
Retail Share by Top 10: East

Value Share (%) – East



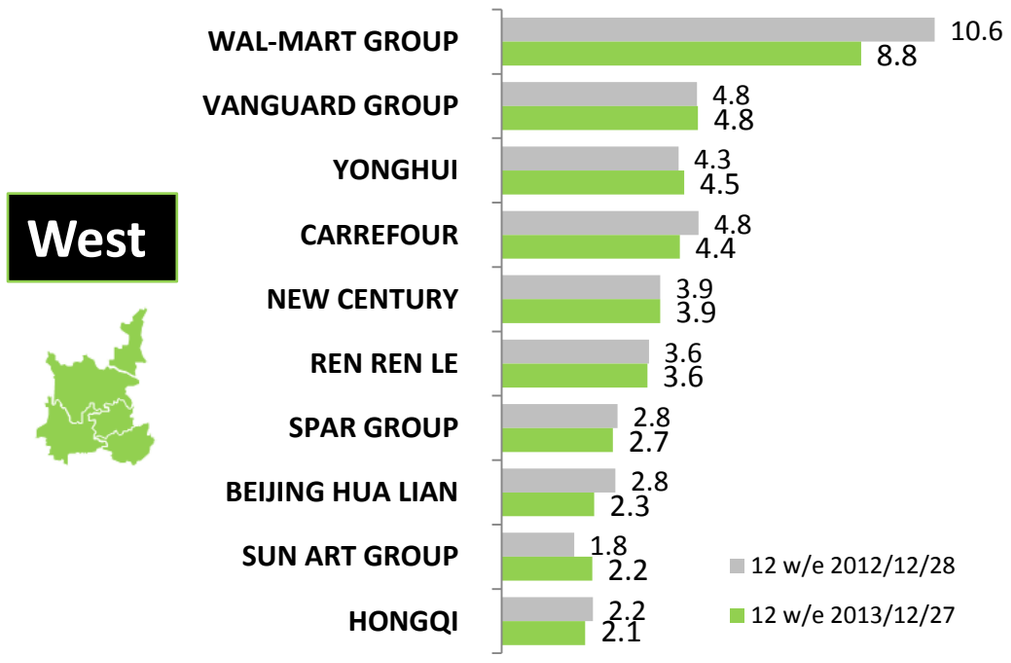
Retail Share by Top 10: South

Value Share (%) – South



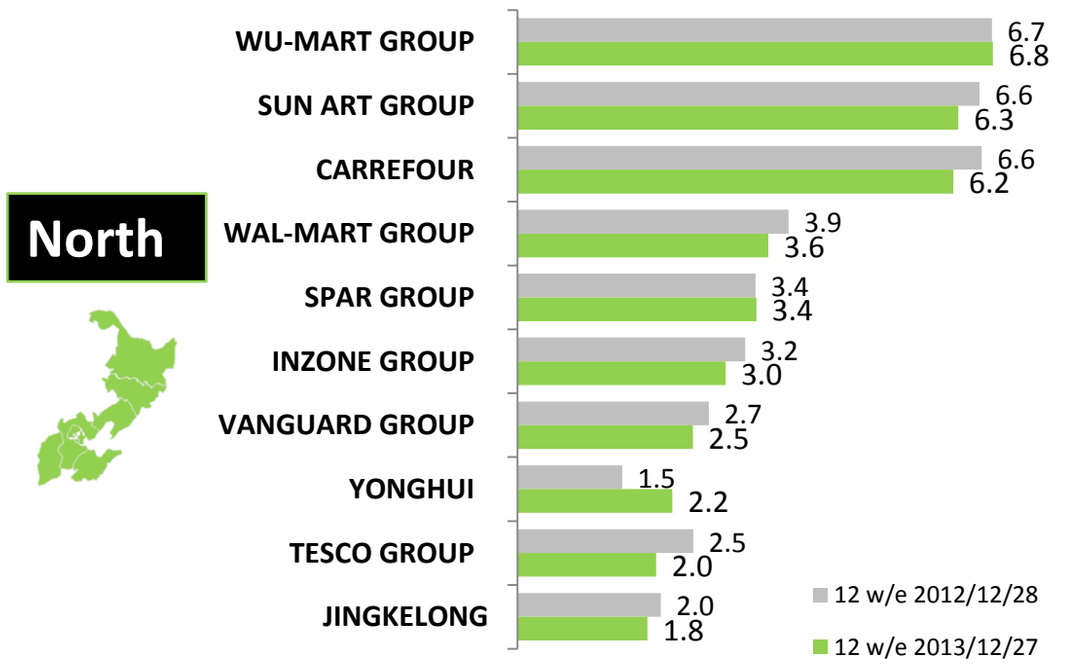
Retail Share by Top 10: West

Value Share (%) – West



Retail Share by Top 10: North

Value Share (%) – North



Data Source: Kantar Worldpanel China - Based on FMCG Market

©2014 KANTAR WORLDPANEL