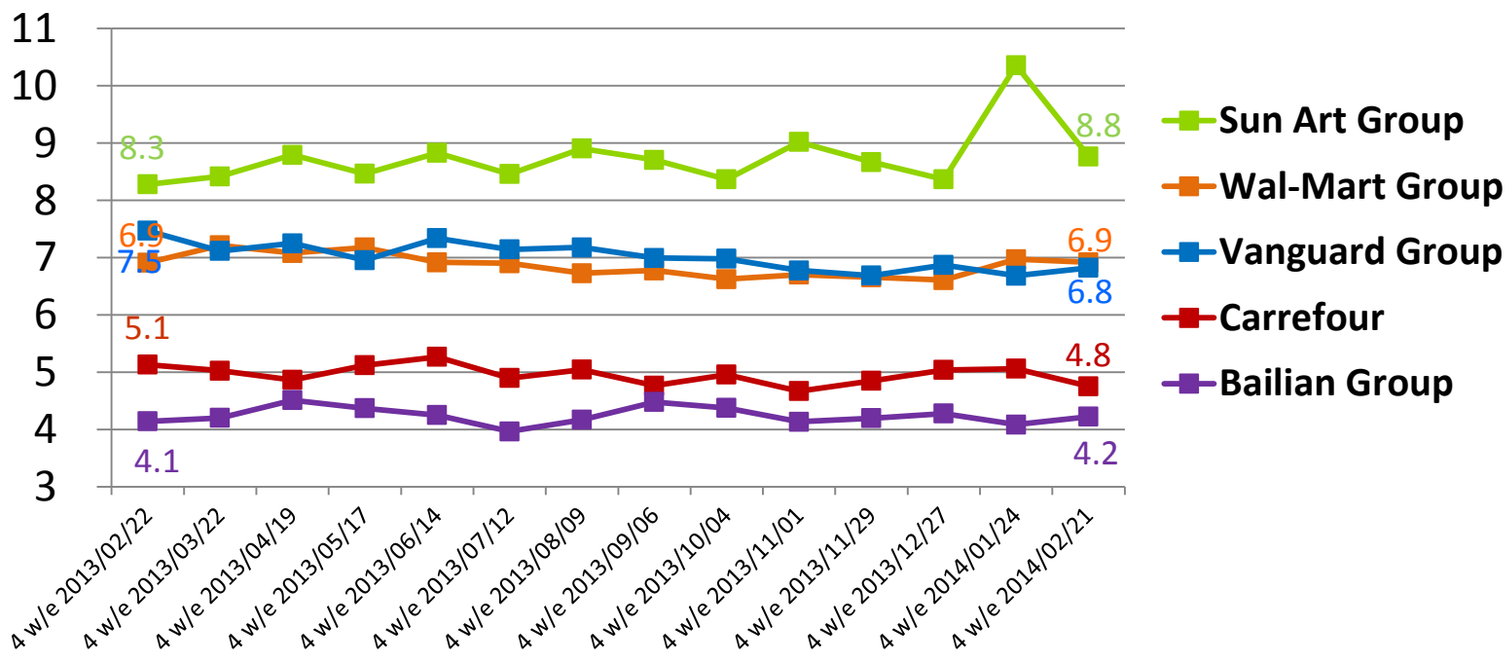
KANTAR WORLDPANEL a CTR service in China

Retail Snapshot

March 2014

4 week share tracking of top 5 retail groups

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



Sun Art Group retains its leading share as previous levels with 1.9 points ahead of Wal-Mart Group.

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

12 w/e P2 2014 vs 12w/e P2 2013: Penetration vs Trip Spend vs Frequency – National China D+

	More Shoppers?	Higher Value Baskets?	More Trips?
大潤發 RT-MART / Auchan	17.2% +4.8%	107 RMB +5.4%	4.3 trips -1.2%
Walmart 中国	16.4% -2.0%	104 RMB +4.1%	3.5 trips -2.3%
华润万家 vanguard	12.8% -3.3%	98 RMB +2.7%	4.7 trips -1.7%
Carrefour	12.3% -3.5%	104 RMB +2.1%	3.3 trips +0.3%
百联集团 BAILIAN GROUP	7.5% -5.8%	102 RMB +10.1%	4.7 trips -1.5%

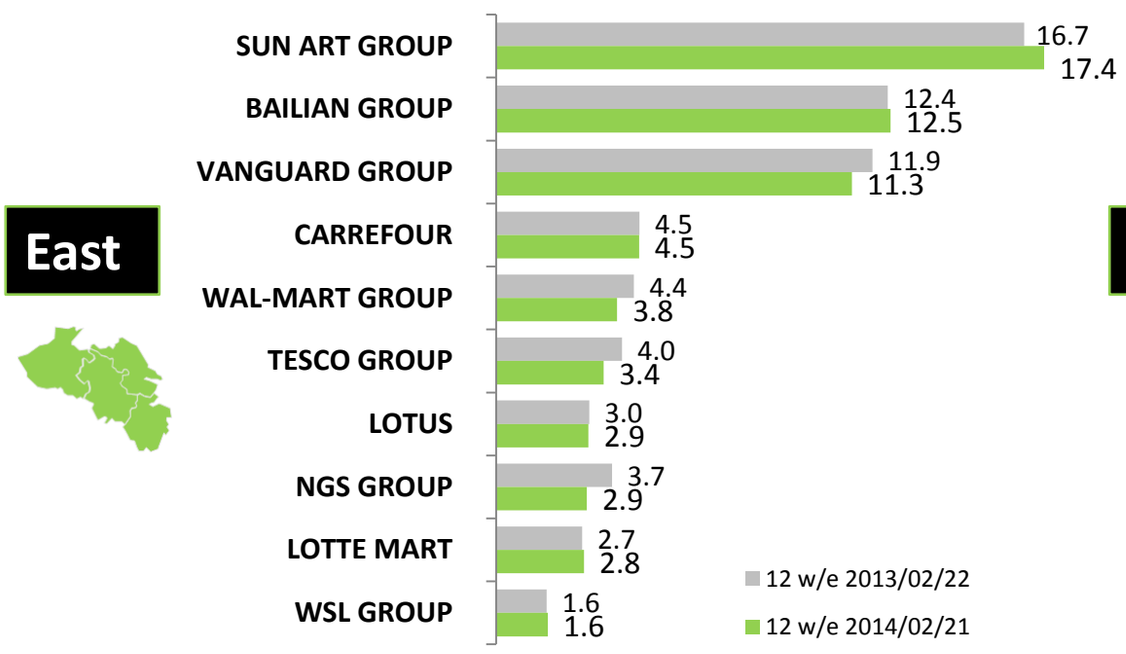
Sun Art Group keeps expanding its *proportion of shoppers* in past 12 weeks, but *less shopping trips* undermine its momentum of fast growth

Bailian Group recent growth has come from *higher value baskets* while also suffered the most serious loss of shoppers

Yonghui continues to grow their presence in the North and South; Sun Art keeps growing across all 4 regions.

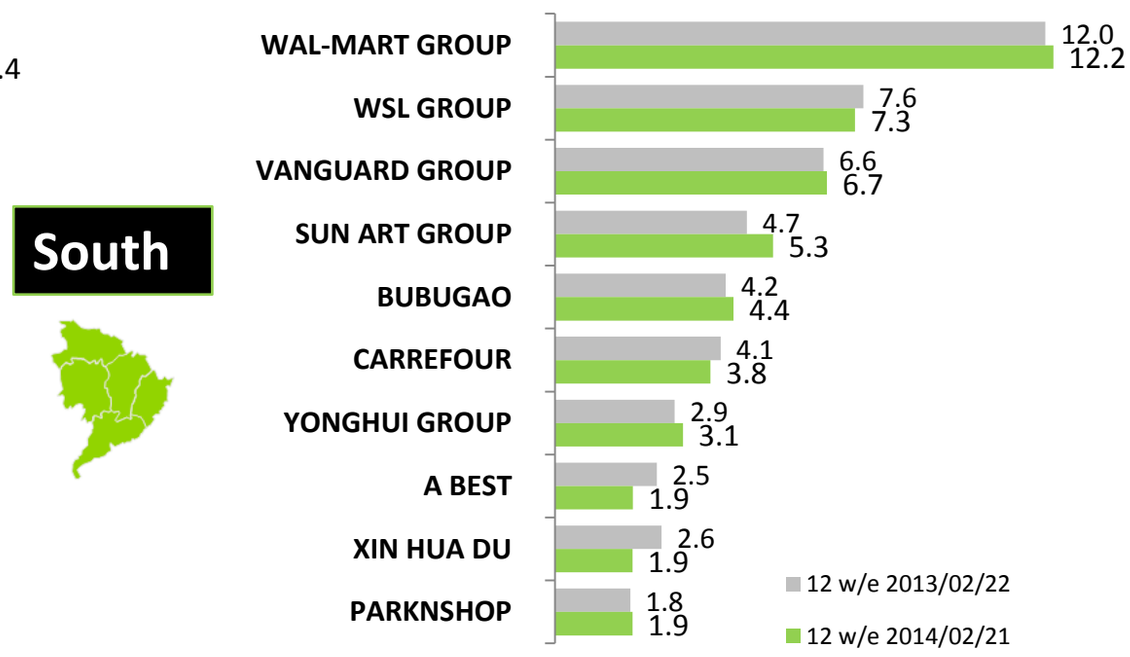
Retail Share by Top 10: East

Value Share (%) – East



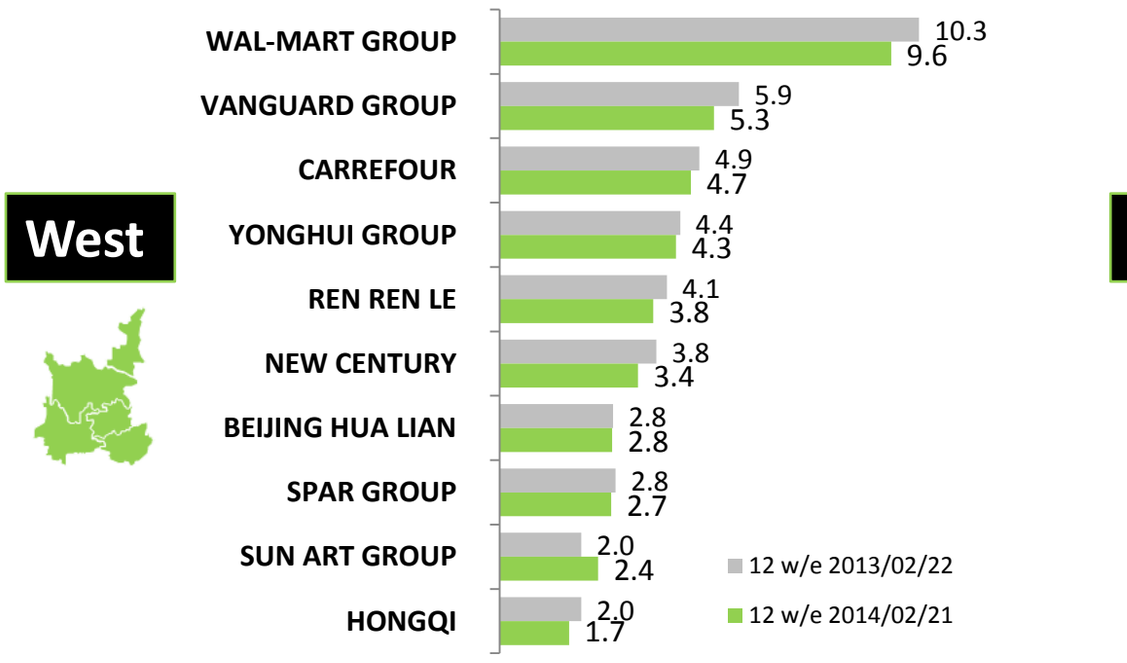
Retail Share by Top 10: South

Value Share (%) – South



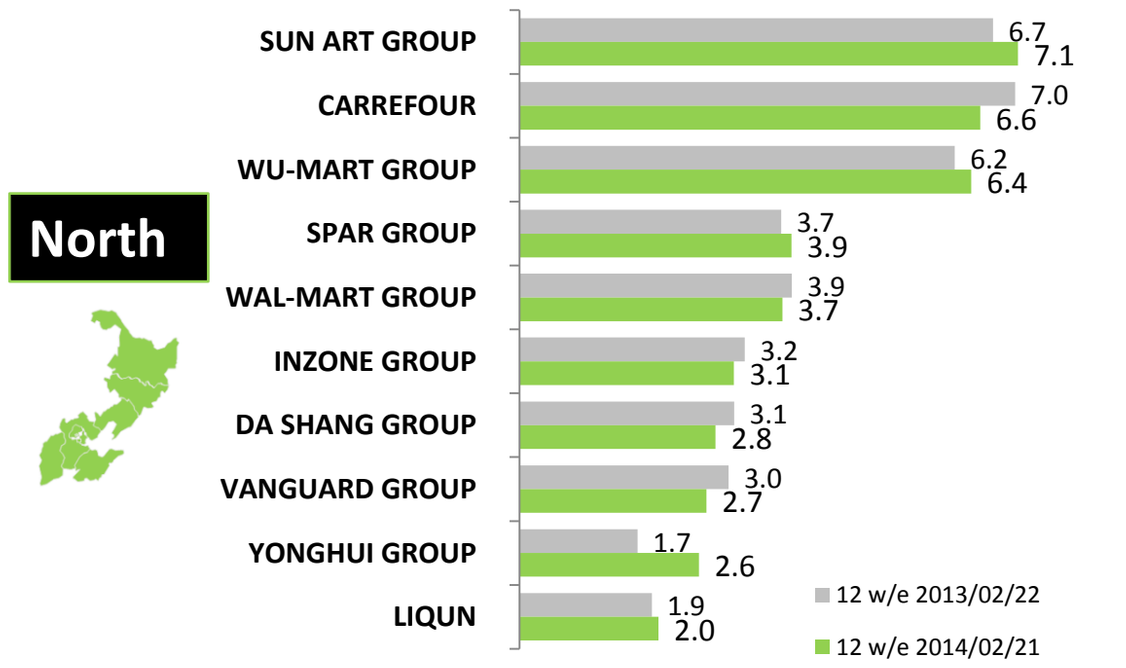
Retail Share by Top 10: West

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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