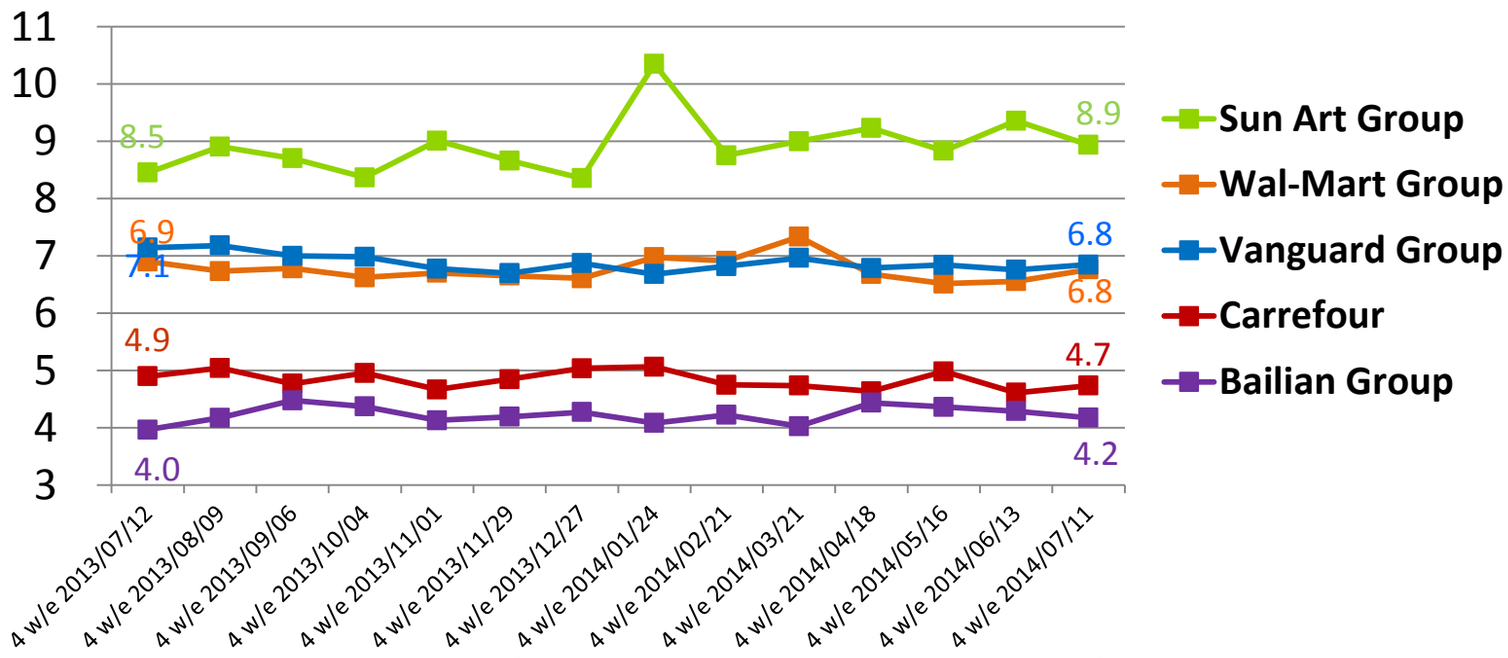
KANTAR WORLDPANEL
a CTR service in China

Retail Snapshot

August 2014

4 week share tracking of top 5 retail groups

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



Sun Art Group floats around 9% of its market share in 2014; Vanguard Group maintains the same number in the latest 12 weeks.

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

12 w/e P7 2014 vs 12w/e P7 2013: Penetration vs Trip Spend vs Frequency – National China D+

	More Shoppers?	Higher Value Baskets?	More Trips?
大潤發 RT-MART / Auchan	15.9% +2.9%	93 RMB +4.1%	4.3 trips -0.3%
Walmart 中国	14.9% -6.6%	91 RMB +4.6%	3.5 trips -2.0%
华润万家 vanguard	12.1% -3.5%	83 RMB +3.8%	4.8 trips -3.4%
Carrefour	11.4% -4.3%	90 RMB +5.2%	3.3 trips -5.6%
百联集团 BAILIAN GROUP	7.3% -4.1%	86 RMB +7.0%	4.8 trips +0.7%

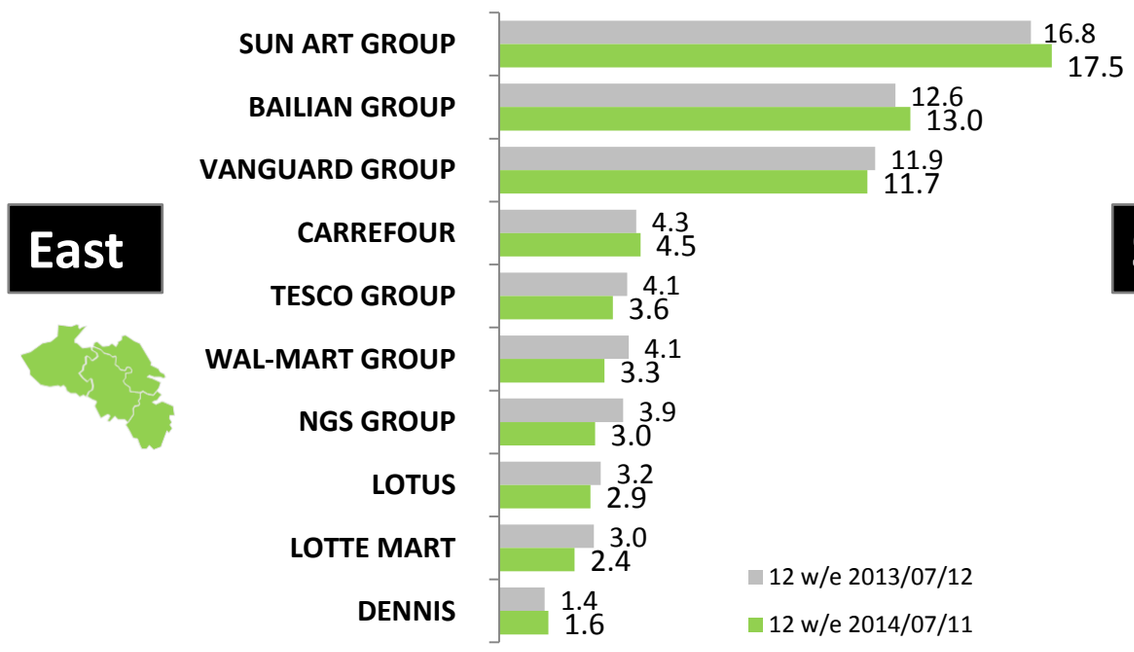
Sun Art Group continued to grow its *proportion of shoppers* over the last 12 weeks but the growth momentum slowed down slightly when compared to previous periods.

Though Bailian managed to grow shopping trips, *a consistent decline in shopper numbers* dragged down its performance in latest 12 weeks.

Vanguard Group and Yonghui continually gained shares in west.

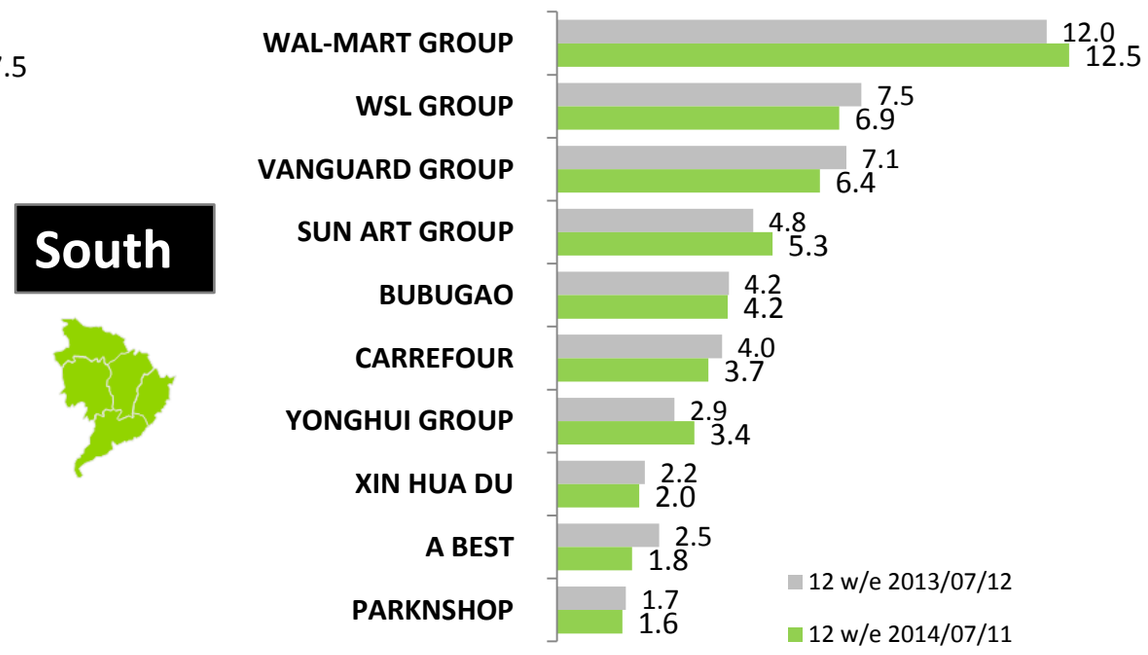
Retail Share by Top 10: East

Value Share (%) – East



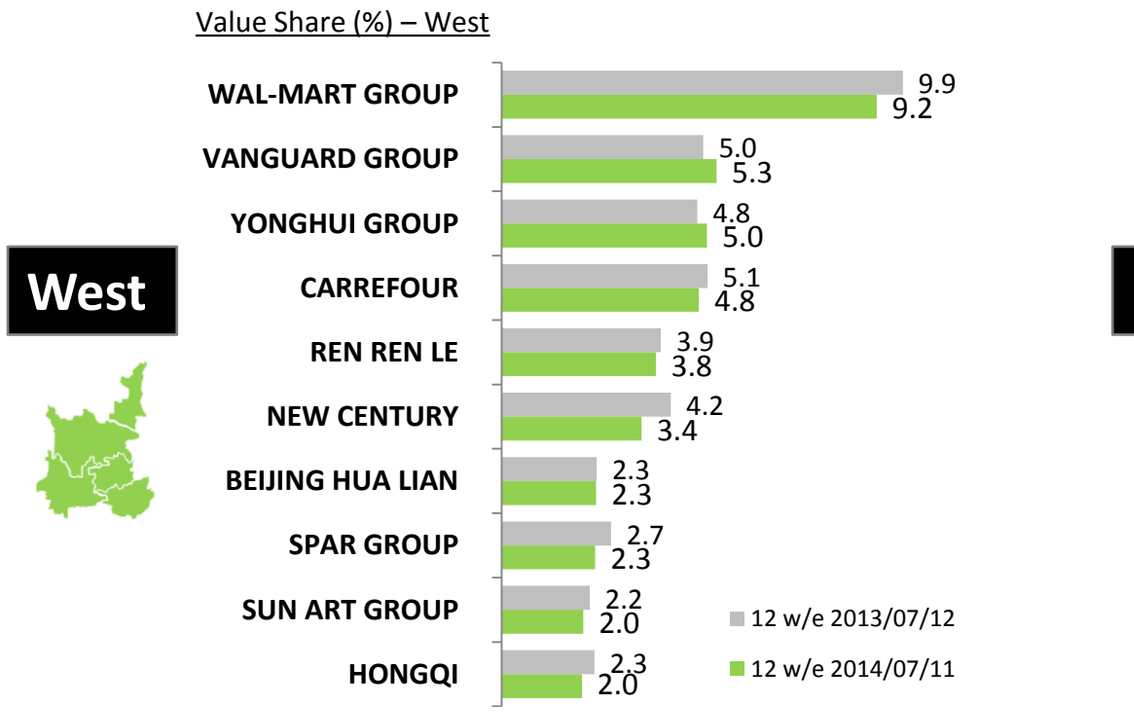
Retail Share by Top 10: South

Value Share (%) – South



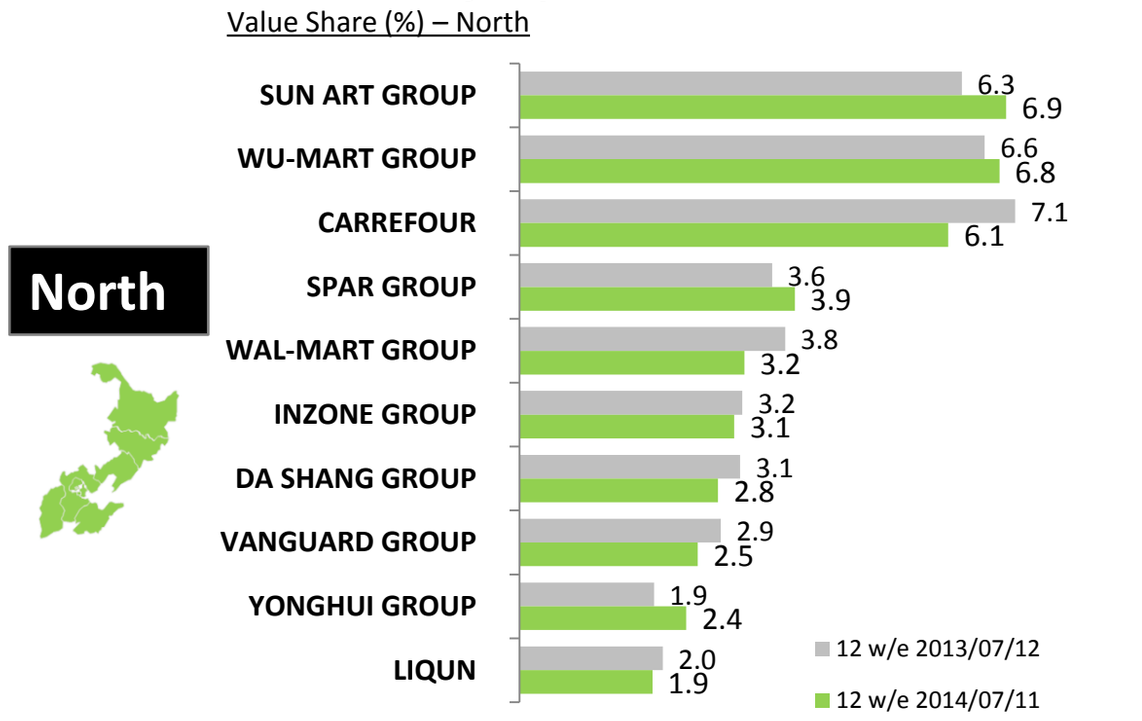
Retail Share by Top 10: West

Value Share (%) – West



Retail Share by Top 10: North

Value Share (%) – North



Data Source: Kantar Worldpanel China - Based on FMCG Market

SUN ART Group includes Auchan and RT-Mart; WAL-MART Group includes Wal-Mart, Trust-mart, Sam's Club; VANGUARD GROUP includes Vanguard, Ole, Huarun SG, Hongkelong; BAILIAN Group includes Century Mart, GMS, Lian Hua, Hua Lian, Quik etc.

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