CHINA FMCG MARKET EXPRESS

52 w/e 2014/08/08

KANTAR WORLDPANEL a CTR service in China

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KEY INDICATORS

China mainland market is still in low growth and stabilized by 5.6%.

FMCG TRENDS

Lower tier cities are key drivers.

HOT CATEGORIES

UHT yogurt for food and mask for non-food.

RETAIL LANDSCAPE

E-commerce continues in high speed growth.

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FMCG TRENDS

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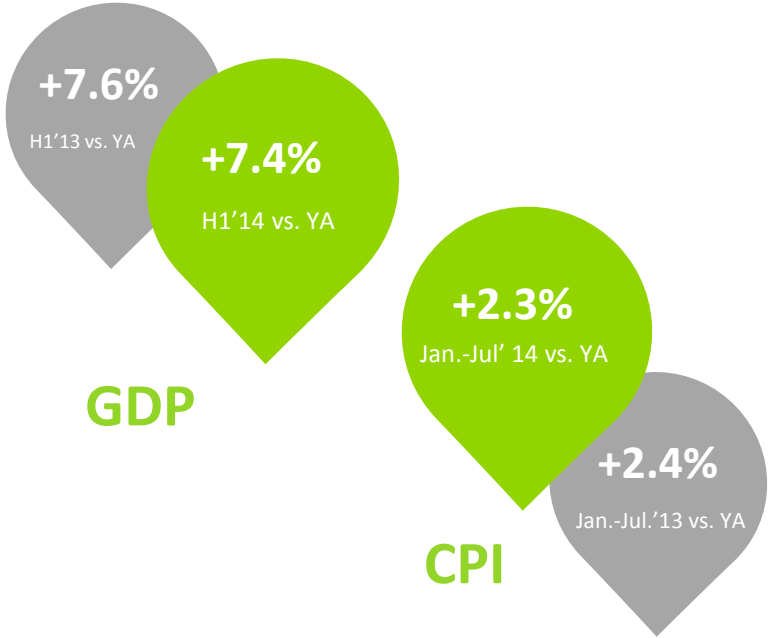
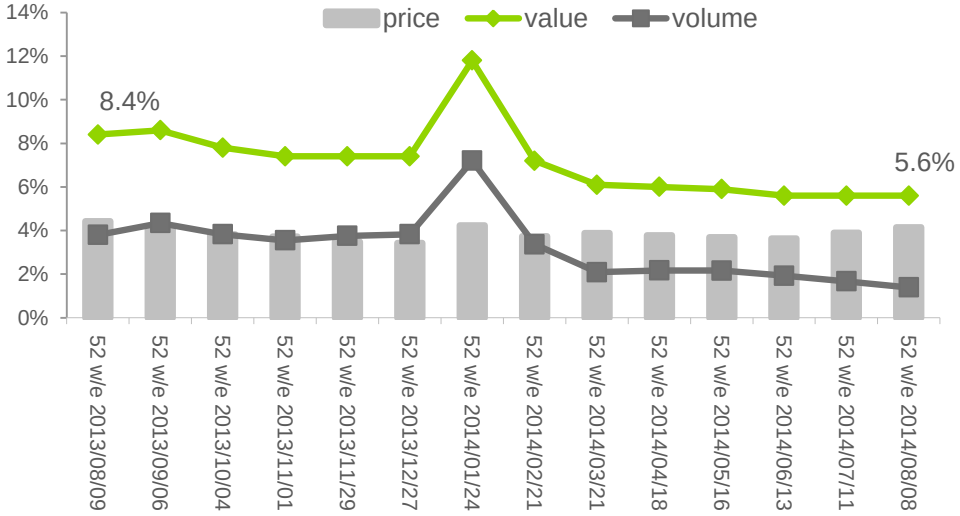
FMCG market in China mainland still grew slowly and increased 5.6%.



FMCG

52 week year on year change(%)



Source: National Bureau of Statistic of the People's Republic of China

Data: 40,000 urban households, Kantar Worldpanel

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FMCG GROWTH BY CITY TIERS

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Lower tier cities are key drivers for growth.

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CATEGORIES OVERVIEW

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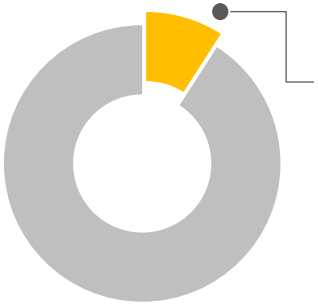
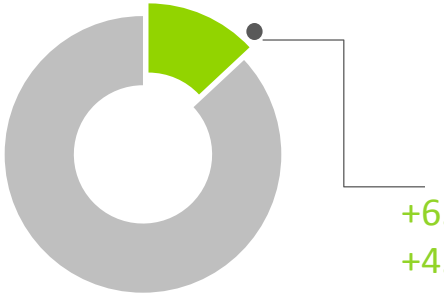
Beverage and Dairy lead the growth for food and personal care for non-food.

FOOD

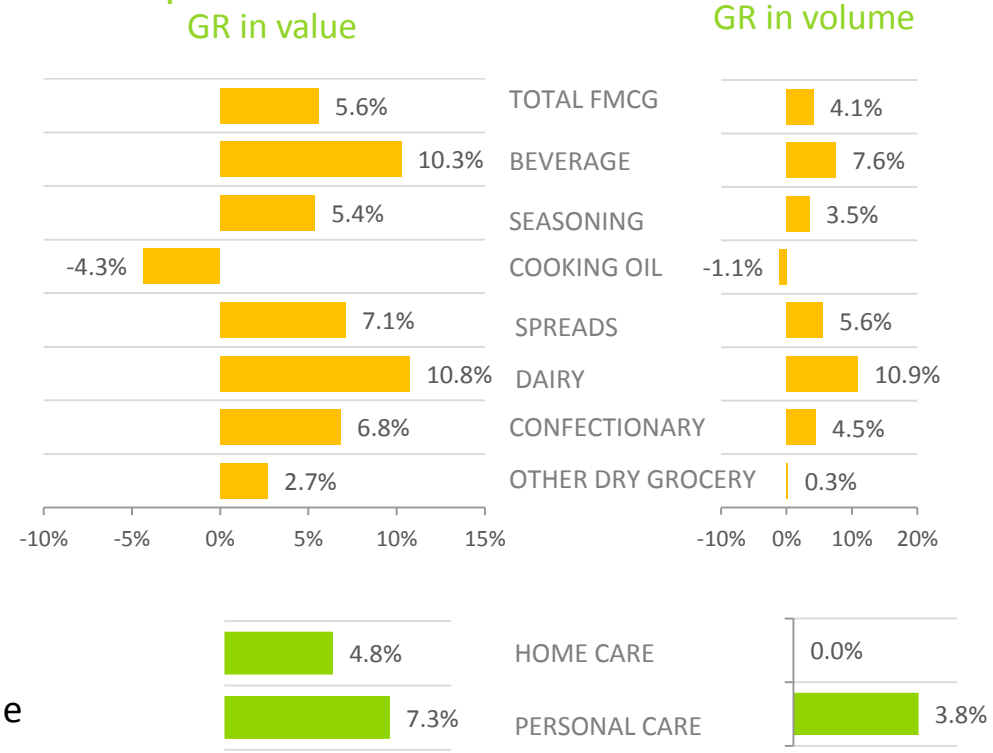


+5.3% in value
+0.9% in volume

NON-FOOD



+6.5% in value
+4.2% in volume



52 w/e 2014/08/08 vs. YA

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HOT CATEGORIES

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FOOD

VOL CHANGE%

+103%

UHT YOGURT

Penetration

Incremental of 17,256,020 households

+10.8pt

Average volume per buyer

Increase volume purchase by 12%

+12%

NON-FOOD

VOL CHANGE%

+12%

MASK

+2.9pt

Penetration

Incremental of 6,059,790 households

+2%

Average volume per buyer

Increase volume purchase by 2%

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RETAIL LANDSCAPE

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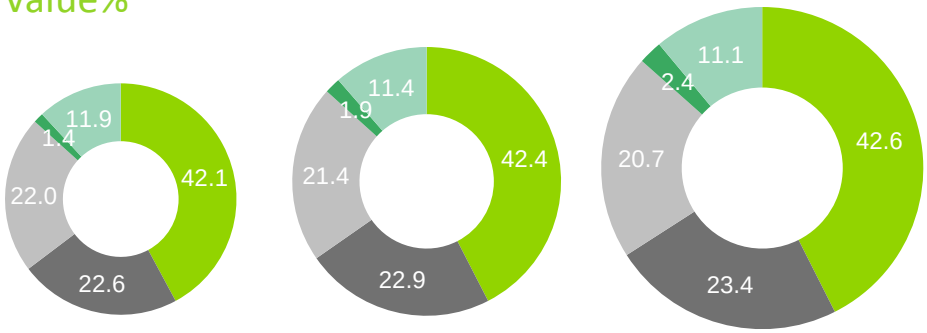
Value%

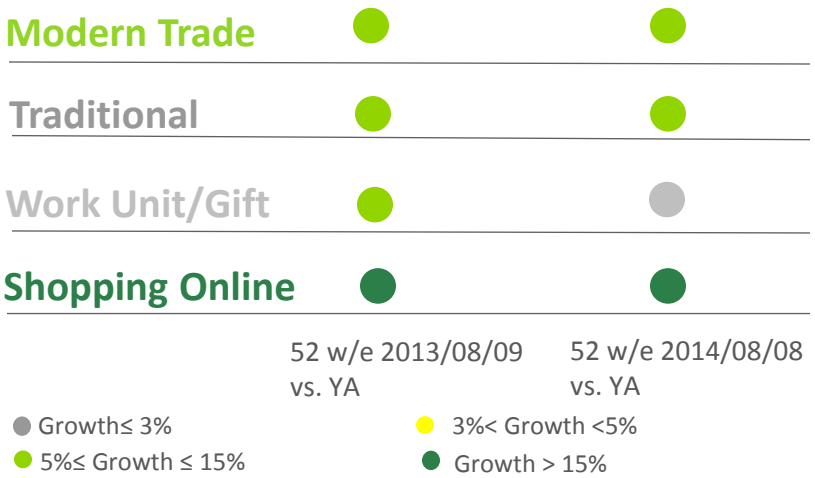


52 w/e 2012/08/10 | 52 w/e 2013/08/09 | 52 w/e 2014/08/08

Modern Trade | Traditional | Work Unit/Gift | Shopping Online | Others

52 w/e 2014/08/08

Value Growth Rate



The growth of gifting is less than 3%; E-commerce is experiencing high-speed increase.

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