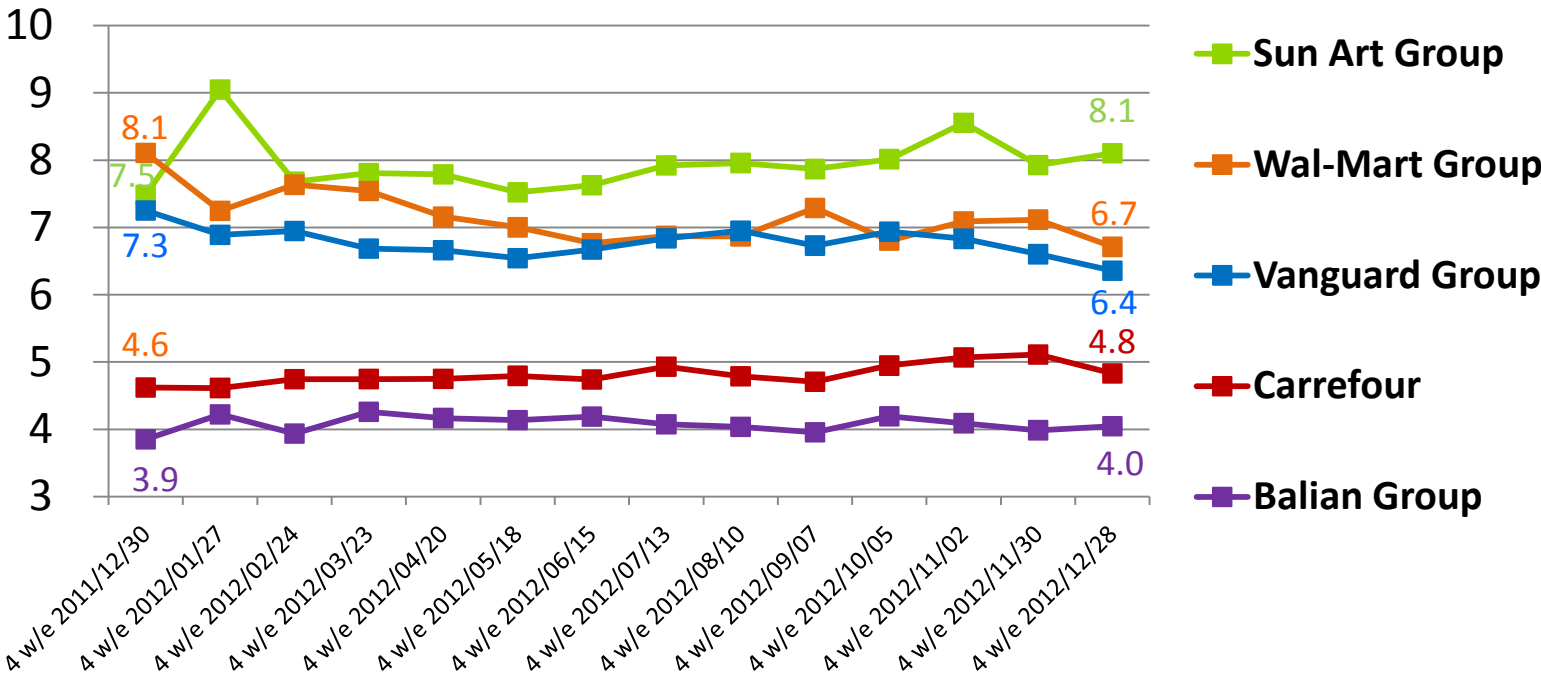


# Retail Snapshot

2012 Year-end edition

## 4 week share tracking of top 5 retail groups

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



**Sun Art Group** strengthens its number 1 position as the other 4 players are unable to grow share, impacted by strong performance from local retailers such as Yonghui

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

12 w/e P13 2012 vs 12w/e P13 2011: Penetration vs Trip Spend vs Frequency – National China D+

	More Shoppers? 	Higher Value Baskets? 	More Trips? 
	15.0% +6.4%	86 RMB +8.9%	4.3 trips -4.6%
	14.9% -4.6%	88 RMB +3.7%	3.7 trips -3.5%
	11.7% +2.5%	78 RMB -0.6%	5.0 trips -2.2%
	11.2% +5.5%	88 RMB +8.1%	3.5 trips +1.0%
	7.5% +6.7%	77 RMB +8.7%	4.8 trips -1.2%

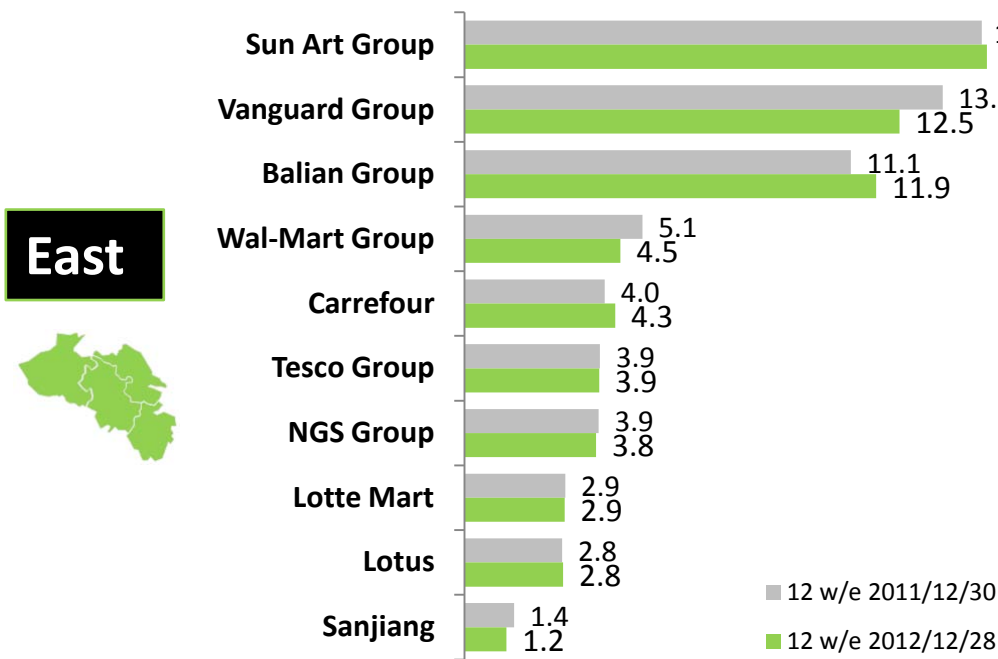
Sun Art Group now reaches more shoppers than Walmart and this combined with it's higher number of trips gives this retailer their number one position.

The Vanguard Group and Balian Group, which offer smaller store formats, see a higher number of trips but smaller basket sizes and fewer shoppers mean they have a lower share compared to the Sun Art Group and Walmart.

Yonghui's performance is particularly impressive in the West where the retailer's share is now nearly the same as Carrefour's.

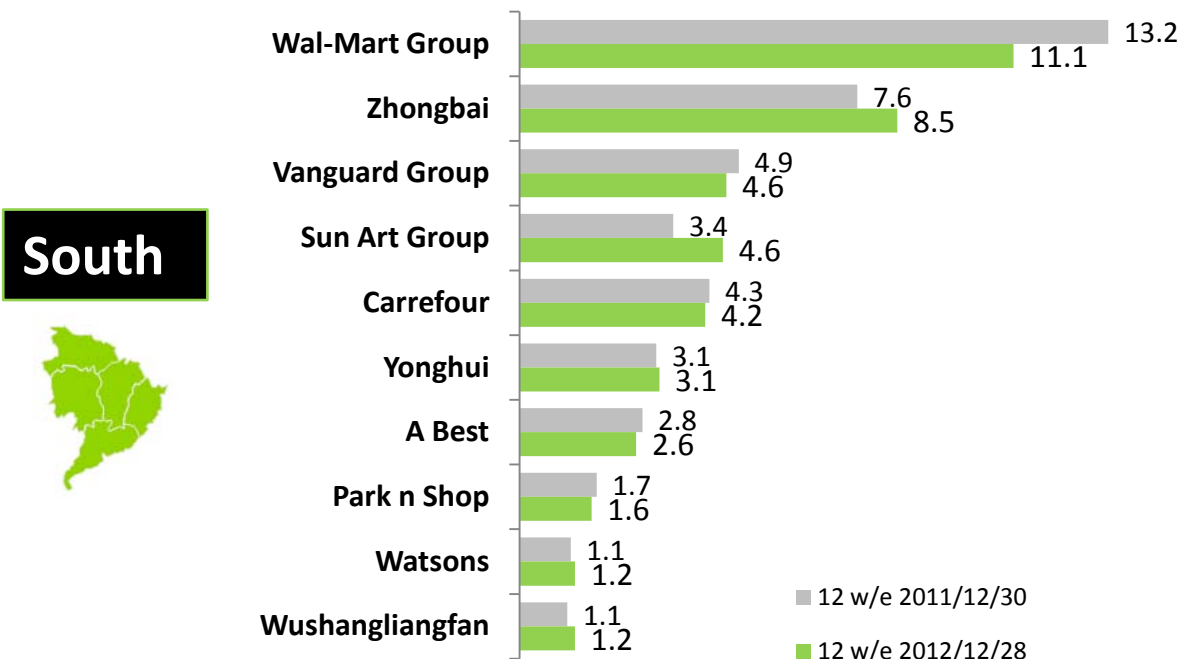
### Retail Share by Top 10: East

Value Share (%) – East



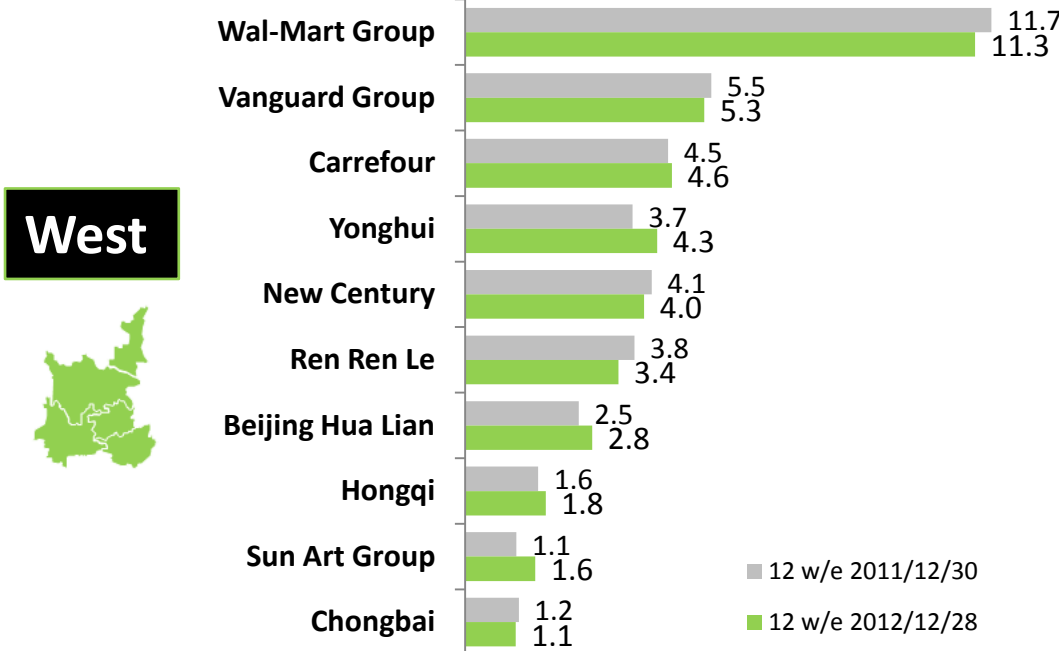
### Retail Share by Top 10: South

Value Share (%) – South



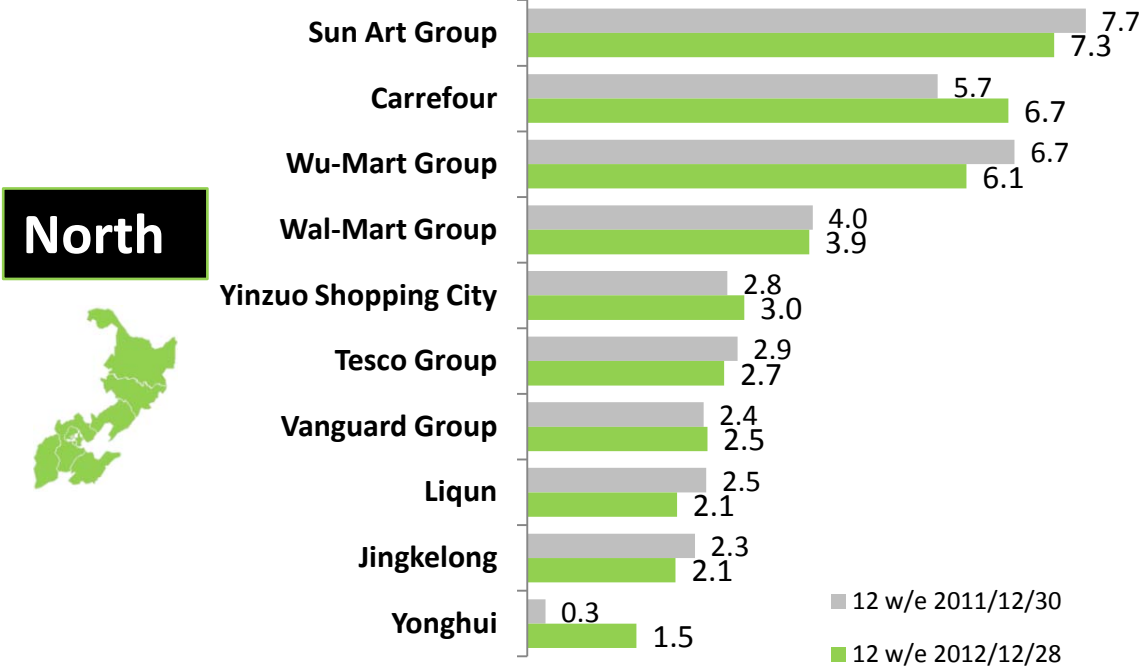
### Retail Share by Top 10: West

Value Share (%) – West



### Retail Share by Top 10: North

Value Share (%) – North



Data Source: Kantar Worldpanel China - Based on FMCG Market