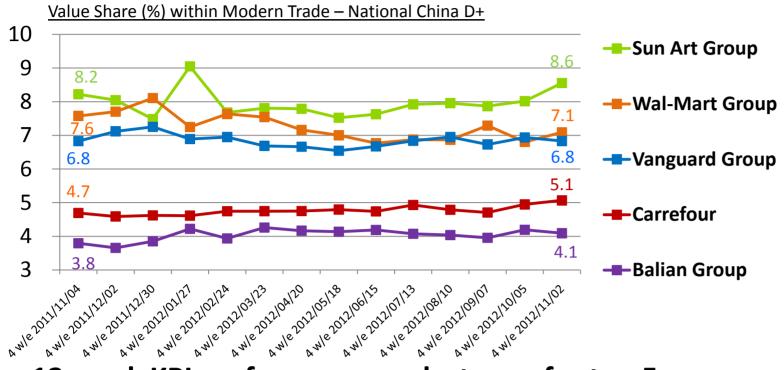
# Retail SnapshOt

## 4 week share tracking of top 5 retail groups



# Sun Art Group

further enlarged its lead over Wal-Mart group in the latest month

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

12 w/e P11 2012 vs 12w/e P11 2011: Penetration vs Trip Spend vs Frequency - National China D+

	More Shoppers?	Higher Value Baskets?	More Trips?
◆大潤毅 RT-MART <b>Auchan</b>	14.8% +6.4%	88 RMB +9.3%	4.5 trips -4.8%
Walmart :	15.5% <b>-1.7%</b>	88 RMB +5.2%	3.7 trips -5.8%
华润万家 vanguard	11.8% +3.2%	82 RMB +5.5%	5.0 trips -1.1%
Carrefour	10.8% +1.9%	92 RMB +13.5%	3.5 trips -1.8%
百联集团	7.4% +0.9%	79 RMB +8.5%	5.0 trips +0.9%

Sun Art Group has seen strong growth in its <u>shopper base</u> as it closes the gap on Walmart whilst also increasing <u>basket value</u>.

Frequency declining for most of the key stores as shoppers increase their basket spending. However, the local retailers are seeing a more stable position.

#### The key local players are gaining share from the international retailers in the South and the West. **Retail Share by Top 10: South Retail Share by Top 10: East** Value Share (%) - East Value Share (%) - South **Sun Art Group Wal-Mart Group** 15.0 13.2 12.8 **Vanguard Group** Zhongbai **Balian Group Vanguard Group** 3.4 4.9 4.5 **Wal-Mart Group Sun Art Group** South **East** 4.0 4.4 4.3 4.0 Carrefour Carrefour 3.8 3.8 Yonghui **NGS Group** 3.8 3.7 A Best **Tesco Group** Lotus Park n Shop Wushangliangfan **Lotte Mart** ■ 12 w/e 2011/11/04 ■ 12 w/e 2011/11/04 Ren Ren Le Sanjiang ■ 12 w/e 2012/11/02 ■ 12 w/e 2012/11/02 **Retail Share by Top 10: West Retail Share by Top 10: North** Value Share (%) - West Value Share (%) - North **Wal-Mart Group Sun Art Group Vanguard Group** Carrefour Carrefour **Wu-Mart Group** 4.0 3.8 North Yonghui **Wal-Mart Group New Century Yinzuo Shopping City** 3.7 3.4 **Vanguard Group** Ren Ren Le 2.8 2.5 **Beijing Hua Lian Tesco Group** 3.0 2.2 2.4 1.6 1.7 Hongqi Liqun 2.3 1.9 Jingkelong **Sun Art Group** ■ 12 w/e 2011/11/04

**Beijing Hua Lian** 

Chongbai

■ 12 w/e 2012/11/02

■ 12 w/e 2011/11/04

■ 12 w/e 2012/11/02