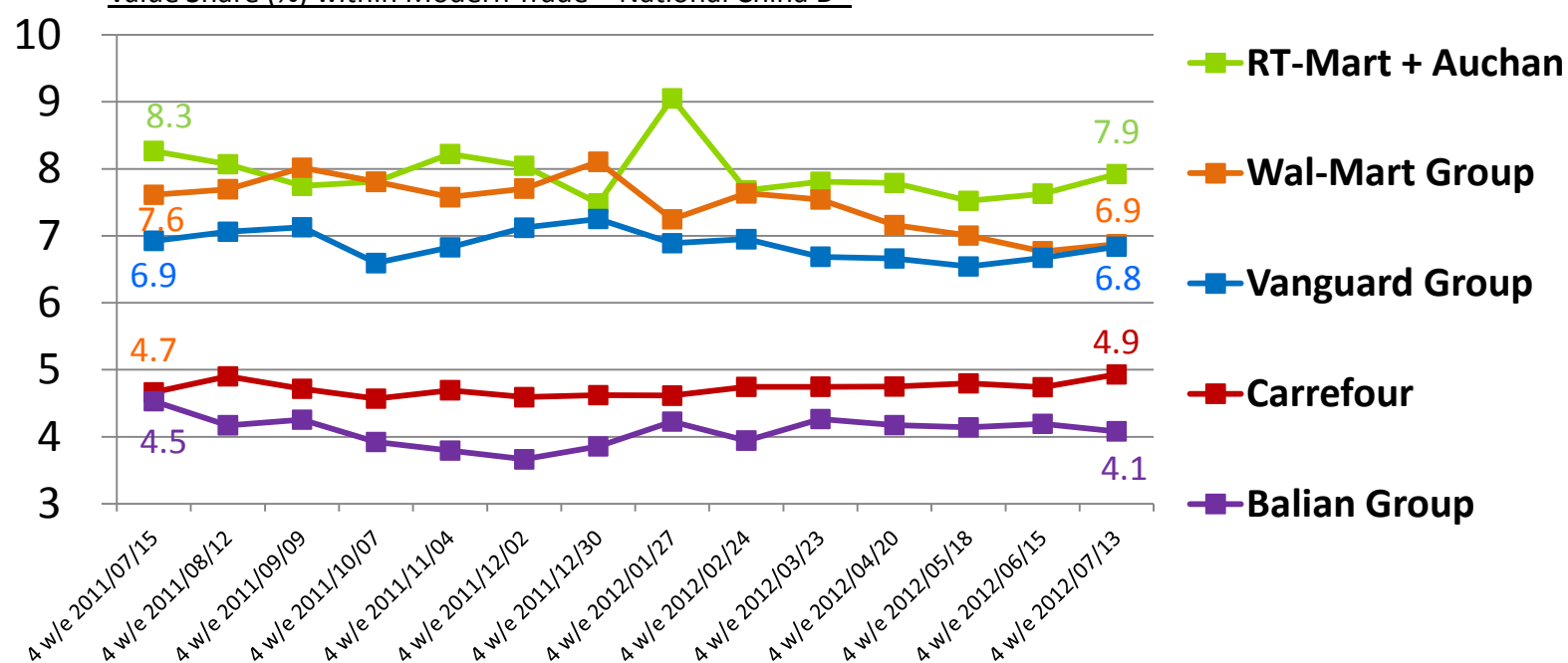


## Retail Snapshot

August 2012

## 4 week share tracking of top 5 retail groups

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



**Carrefour** maintains share position in latest month whilst other top 4 players lose share versus a year ago

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

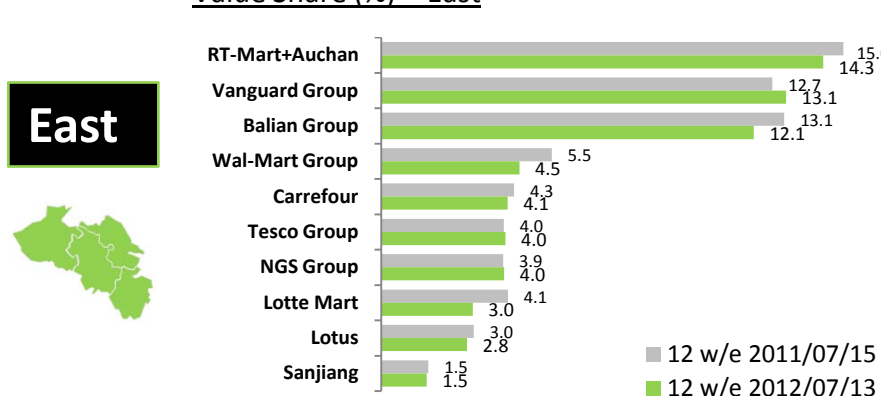
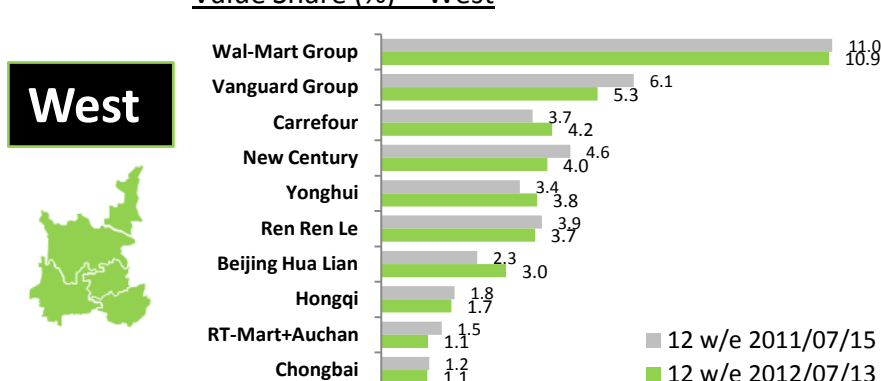
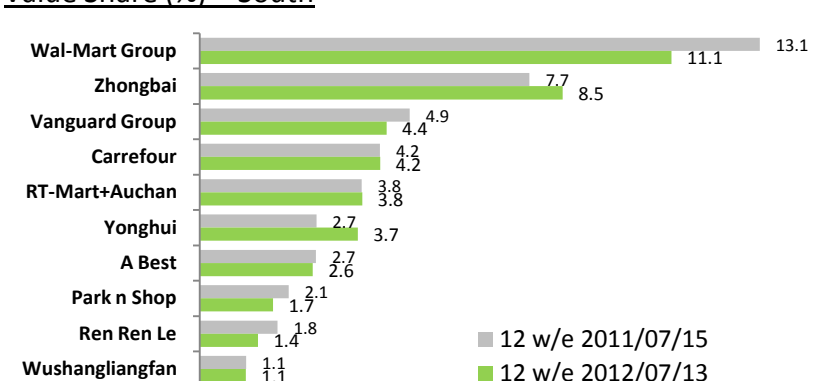
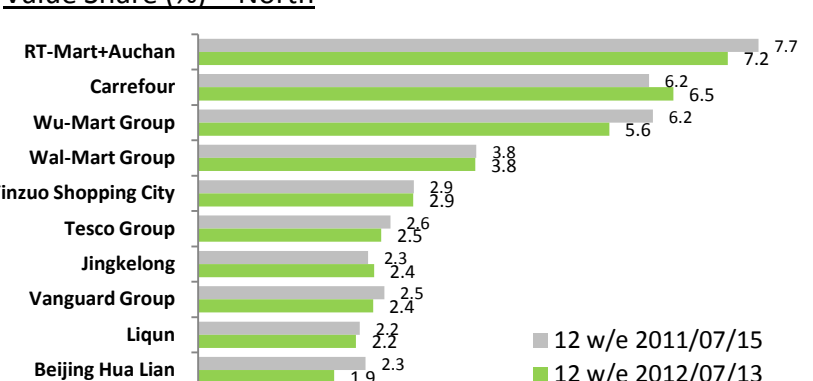
12 w/e P7 2012 vs 12w/e P7 2011: Penetration vs Trip Spend vs Frequency – National China D+

	More Shoppers? 	Higher Value Baskets? 	More Trips? 
	13.9% <b>-1.2%</b>	82 RMB <b>+10.1%</b>	4.6 trips <b>-4.1%</b>
	15.5% <b>-4.8%</b>	80 RMB <b>+5.3%</b>	3.8 trips <b>-2.3%</b>
	11.5% <b>-2.7%</b>	77 RMB <b>+10.7%</b>	5.1 trips <b>-0.7%</b>
	11.1% <b>+3.9%</b>	84 RMB <b>+8.7%</b>	3.5 trips <b>-0.9%</b>
	7.5% <b>-12.6%</b>	74 RMB <b>+14.0%</b>	5.1 trips <b>+0.7%</b>

Carrefour attracts more shoppers as well as increased basket spend while Walmart and Balian group seeing declining penetration

Frequency declining for most of the key stores as shoppers increase their trip spending

## Yonghui has now established itself as a key player in the South and West of China

Retail Share by Top 10: East  
Value Share (%) – EastRetail Share by Top 10: West  
Value Share (%) – WestRetail Share by Top 10: South  
Value Share (%) – SouthRetail Share by Top 10: North  
Value Share (%) – North

Data Source: Kantar Worldpanel China - Based on FMCG Market