KANTAR WURLDPANEL

Retail SnapshOt

4 week share tracking of top 5 retail groups



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?
◆大潤發 RT-MART	13.9% -1.2%	82 RMB +10.1%	4.6 trips -4.1%
Walmart 中国	15.5% -4.8%	80 RMB +5.3%	3.8 trips -2.3%
华海万家 vanguard	11.5% -2.7%	77 RMB +10.7%	5.1 trips -0.7%
Carrefour	11.1% +3.9%	84 RMB +8.7%	3.5 trips -0.9%
百联集团 BALIAN GROUP	7.5% -12.6%	74 RMB +14.0%	5.1 trips +0.7%

Carrefour attracts <u>more shoppers</u> 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 Retail Share by Top 10: South Value Share (%) - East Value Share (%) - South **Wal-Mart Group** RT-Mart+Auchan Zhongbai Vanguard Group 12.7 13.1 South 4.4 East **Vanguard Group Balian Group** 4.5 Carrefour 4.2 4.2 Wal-Mart Group RT-Mart+Auchan 4.3 4.1 4.0 4.0 Tesco Group A Best 2.7 2.6 3.9 4.0 **NGS Group** Park n Shop Lotte Mart Ren Ren Le 3.0 2.8 ■ 12 w/e 2011/07/15 Lotus ■ 12 w/e 2011/07/15 Wushangliangfan $\frac{1.1}{1.1}$ ■ 12 w/e 2012/07/13 Sanjiang ■ 12 w/e 2012/07/13 Retail Share by Top 10: West Retail Share by Top 10: North Value Share (%) - West Value Share (%) - North **Wal-Mart Group** 11.0 10.9 RT-Mart+Auchan **Vanguard Group** Carrefour North 3.7 4.2 Carrefour **Wu-Mart Group New Century** 4.6 4.0 Wal-Mart Group Yonghui 3.4 3.8 **Yinzuo Shopping City** Ren Ren Le 3.9 3.7 2.6 2.5 **Tesco Group** ^{2.3} 3.0 2.3 2.4 **Beijing Hua Lian Jingkelong** Hongqi Vanguard Group 2.5 2.4 RT-Mart+Auchan Liqun ■ 12 w/e 2011/07/15 ■ 12 w/e 2011/07/15 Chongbai Beijing Hua Lian ■ 12 w/e 2012/07/13 ■ 12 w/e 2012/07/13

Data Source: Kantar Worldpanel China - Based on FMCG Market