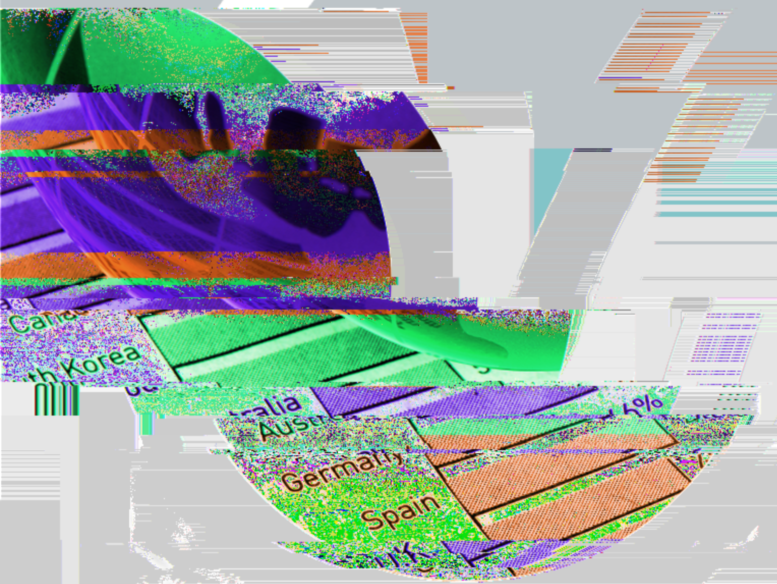
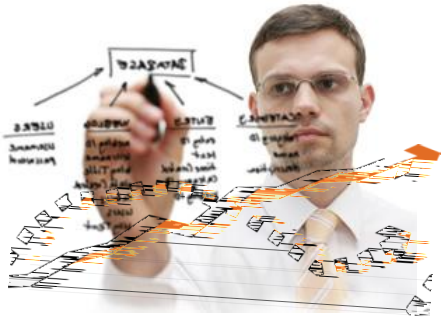


March 2010

- ❑ Making sense of global markets
- ❑Passport GMID
  A wining –business database for libraries
- ❑
- ❑GMID
  A complete intelligence service
- ❑Q&A



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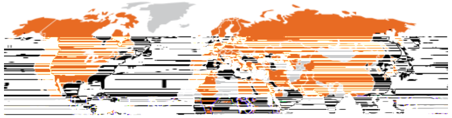

- B2B

- Industries: 95% of global consumer spending
- Countries, Consumers: 205 countries

地理區	國家
西歐	奧地利,比利時, 丹麥, 芬蘭, 法國, 德國,希臘,愛爾蘭,義大利, 荷蘭, 挪威, 葡萄牙, 西班牙, 瑞典, 瑞士, 土耳其, 英國
東歐	白俄羅斯,保加利亞,克羅埃西亞,捷克共和國, 愛沙尼亞, 匈牙利,拉脫維亞,立陶宛,波蘭, 羅馬尼亞,俄羅斯, 斯洛伐克, 斯洛維尼亞,烏克蘭
北美	墨西哥, 加拿大, 美國
南美 & 中美	阿根廷, 玻利維亞, 巴西, 智利, 哥倫比亞,厄瓜多爾, 墨西哥, 祕魯, 委內瑞拉
亞太地區	亞塞拜然, 中國, 香港, 印度, 印尼, 日本,哈薩克, 馬來西亞,巴基斯坦,菲律賓, 新加坡, 南韓, 台灣, 泰國, 越南,土庫曼
大洋洲	澳洲, 紐西蘭
非洲 & 中東	阿爾及利亞, 埃及, 以色列, 約旦,,科威特, 摩洛哥,奈及利亞,沙烏地阿拉伯, 南非

Unilever
Johnson & Johnson Inc.
FERRERO
Pfizer
L'ORÉAL
Heinz
ABN·AMRO
Coca-Cola
MARS incorporated
Henkel
A Brand like a Friend
P&G
Boots
Dresdner Kleinwort Wasserstein
Cadbury Schweppes
accenture
JPMorgan
STARBUCKS COFFEE
Nestlé
AVON
the company for women
ESTĒE LAUDER
THE BOSTON CONSULTING GROUP
KRAFT
oriflame
Pierre Fabre
gsk GlaxoSmithKline
Fonterra
CREDIT SUISSE | FIRST BOSTON
Goldman Sachs
PEPSICO
DANONE
Amway
Kimberly-Clark
i'm lovin' it
Merrill Lynch
SC Johnson
A FAMILY COMPANY
Ford Motor Company
BRITISH LIBRARY
IFF International Flavors & Fragranc
HERBALIFE
DANISCO
First you add knowledge...
Firmenich
REXAM
THE BODY SHOP
Carrefour
METRO Group
The Spirit of Commerce
ALCATEL
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LSE economics

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CREPUQ CONFÉRENCE DES RECTEURS ET DES PRINCIPAUX DES UNIVERSITÉS DU QUÉBEC

ESPM

Handelshøjskolen i Århus Aarhus School of Business

DLSU De La Salle University

IMD

KOREA UNIVERSITY

HARVARD BUSINESS SCHOOL

TECNOLÓGICO DE MONTERREY.

GOLDEN GATE UNIVERSITY

WIRTSCHAFTS UNIVERSITÄT WIEN

London Business School

HEC PARIS

IESE Business School University of Navarra

UNIVERSITY OF ALBERTA

ASTON BUSINESS SCHOOL

PACE UNIVERSITY

Vlerick Leuven Gent Management School

University of Indonesia

EDUTECH ENHANCING KNOWLEDGE

TVU

DIT

UNIVERSITI SAINS MALAYSIA

1906 SZKOŁA GŁÓWNA HANDLOWA W WARSZAWIE 2006 Od wieku na oceanie wiedzy

MIT

UNIVERSITY OF LEEDS

SMU SINGAPORE MANAGEMENT UNIVERSITY

NHH

ALMA MATER STUDIORUM UNIVERSITÀ DI BOLOGNA

ECOLE HOTELIERE LAUSANNE Since 1893 First in the W

What is Passport GMID?

Industries & Countries& Consumers

Industries

+5

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行业研究范围






DIY



















Countries

- ❑Economy Finance and trade
- ❑Government labor and education
- ❑Industry ,infrastructure and Environment
- ❑Technology ,communication and media

Consumers

- ❑Population and homes
- ❑Income and expenditure
- ❑Consumer trends and lifestyles

C&C-Economy Finance and Trade

- ❑Balance of payment
- ❑Consumer confidence
- ❑Foreign Direct investment (FDI)
- ❑GDP
- ❑Gross National Income(GNI)
- ❑Inflation
- ❑poverty
- ❑Imports
- ❑Exports
- ❑Trade balance

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GDP

- GDP

40

What is it?

▪

▪52 ,19

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- Inflation
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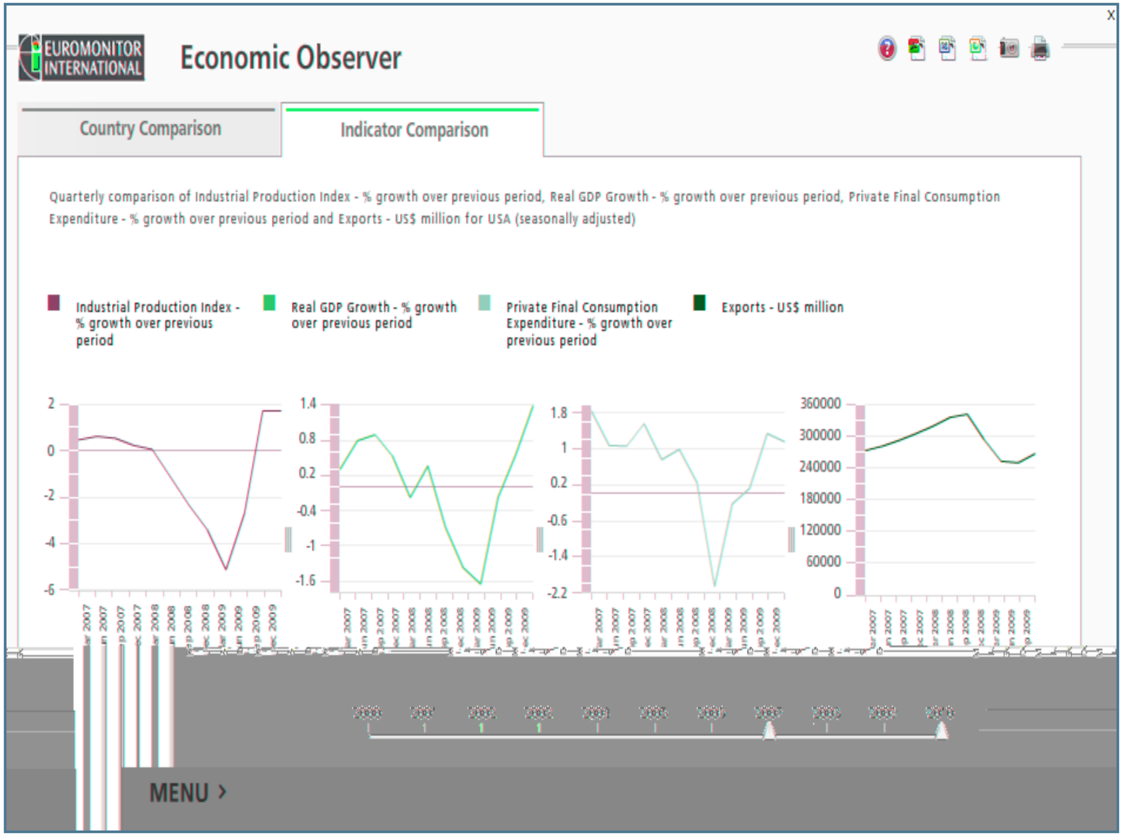
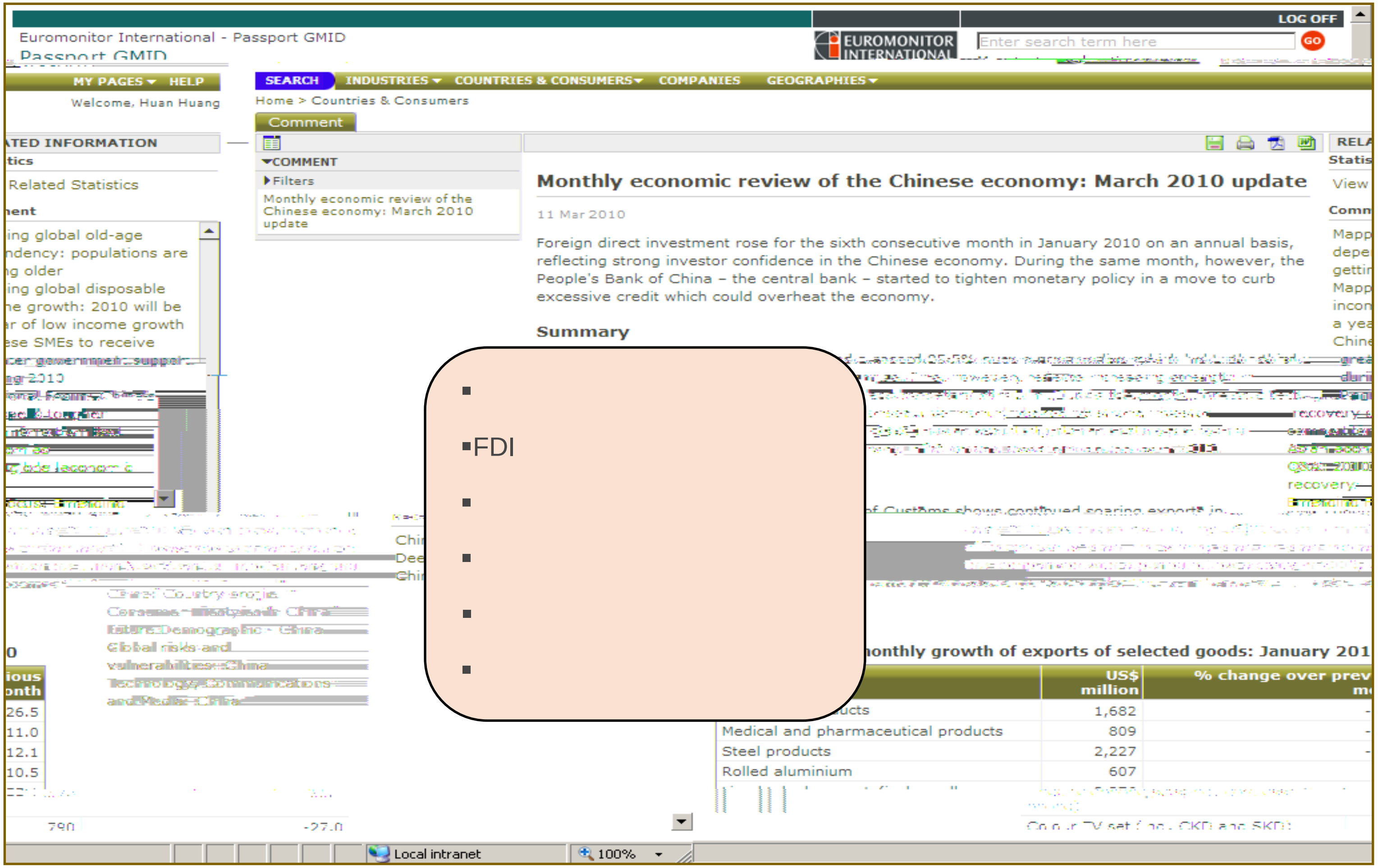
- Unemployment rate
- Trade balance
- Exchange rate against US
- Oil prices
- Import& exports
- CPI ,PPI
- Long term interest rate



C&C-Economy Finance and Trade--



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- Corruption
- Domestic policy
- Easy of doing business ranking
- Elections
- Foreign trade policy
- Global competiveness index
- Government expenditure
- Government finance
- Labor
- Literacy and education
- Minimum wage per month

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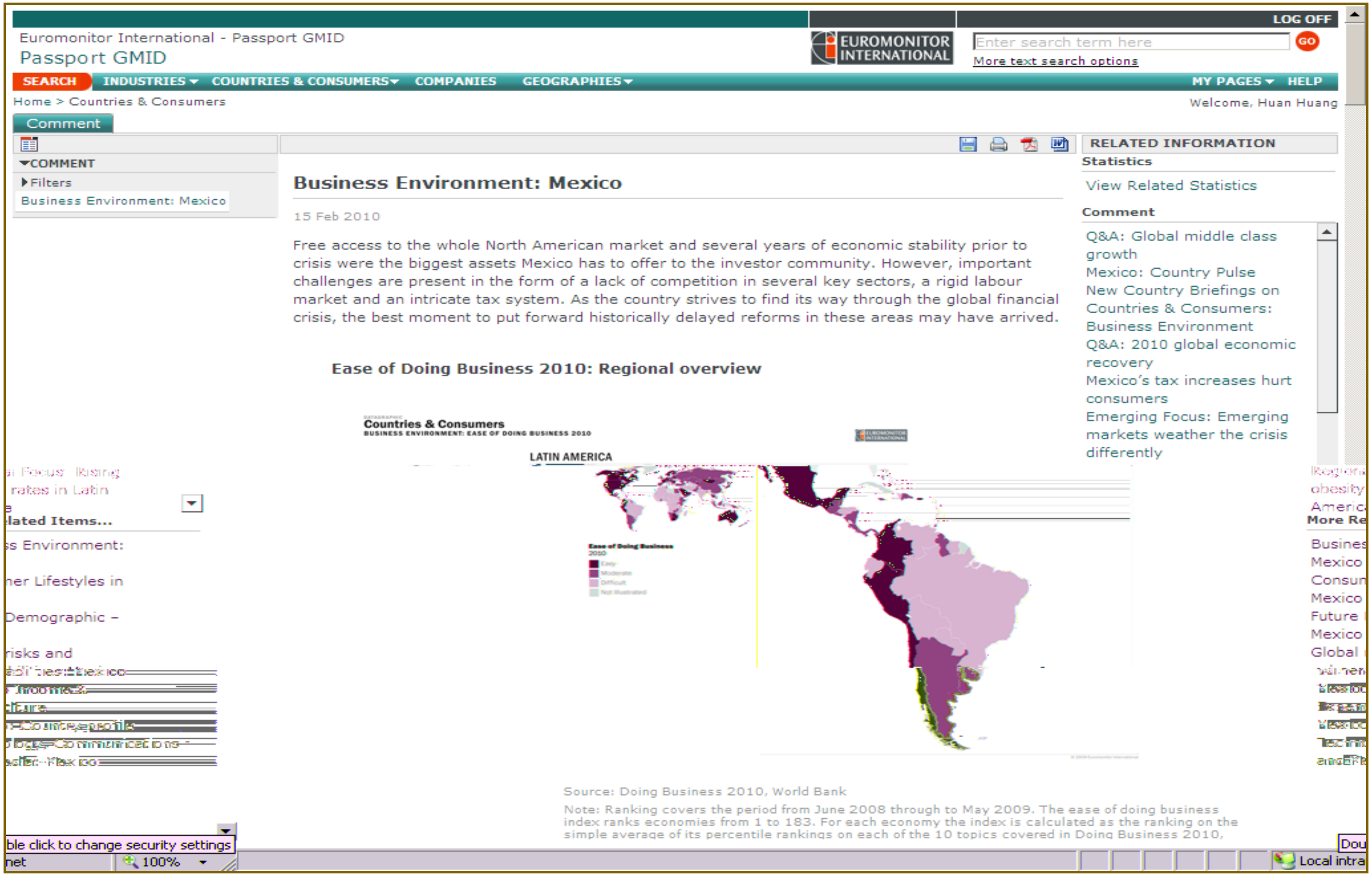
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Mexico: Country Pulse
New Country Briefings on Countries & Consumers: Business Environment
Q&A: 2010 global economic recovery
Mexico's tax increases hurt consumers
Emerging Focus: Emerging markets weather the crisis differently
Business Environment: Mexico
15 Feb 2010
Free access to the whole North American market and several years of economic stability prior to crisis were the biggest assets Mexico has to offer to the investor community. However, important challenges are present in the form of a lack of competition in several key sectors, a rigid labour market and an intricate tax system. As the country strives to find its way through the global financial crisis, the best moment to put forward historically delayed reforms in these areas may have arrived.
Ease of Doing Business 2010: Regional overview
Countries & Consumers
BUSINESS ENVIRONMENT: EASE OF DOING BUSINESS 2010
LATIN AMERICA
Source: Doing Business 2010, World Bank
Note: Ranking covers the period from June 2008 through to May 2009. The ease of doing business index ranks economies from 1 to 183. For each economy the index is calculated as the ranking on the simple average of its percentile rankings on each of the 10 topics covered in Doing Business 2010.
100%
Local intra

C&C—Industry ,Infrastructure ,and Environment

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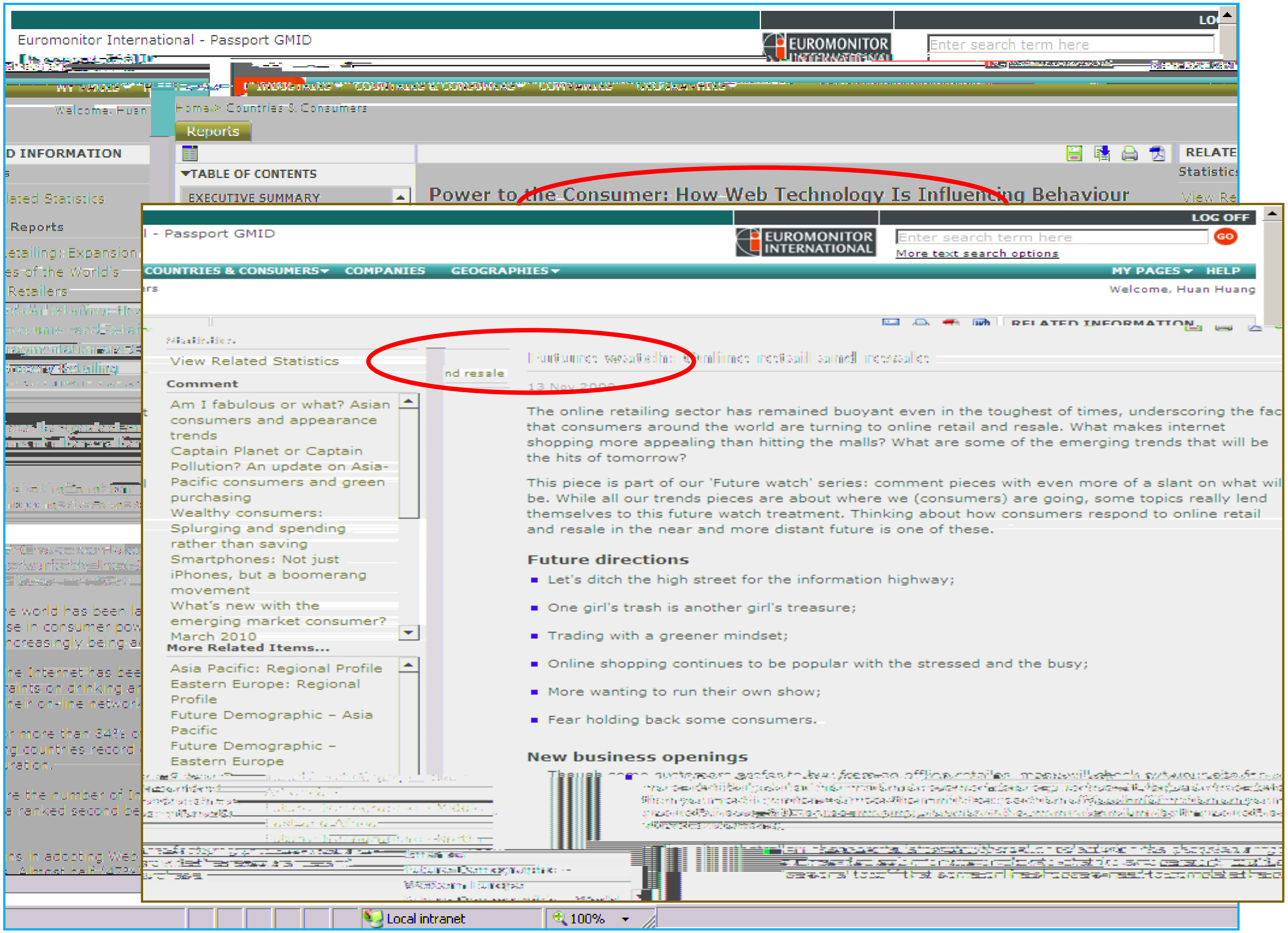
In India, e-commerce is booing ,but 85% of online shoppers are male.

In Mexico ,consumers tend to purchase expensive handset while using the actural mobile communication service as little as possible.

In South korea ,92.9% of the poorest10%(decile 1)houshoulds had a brandband internet connection in 2009, compared with only 18.9% of the decile 1 households in UK.

ISDN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Smartphones: Not just iPhones, but a boomerang movement
What's new with the emerging market consumer? March 2010
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Eastern Europe: Regional Profile
Future Demographic – Asia Pacific
Future Demographic – Eastern Europe
nd resale
The online retailing sector has remained buoyant even in the toughest of times, underscoring the fac that consumers around the world are turning to online retail and resale. What makes internet shopping more appealing than hitting the malls? What are some of the emerging trends that will be the hits of tomorrow?
This piece is part of our 'Future watch' series: comment pieces with even more of a slant on what wil be. While all our trends pieces are about where we (consumers) are going, some topics really lend themselves to this future watch treatment. Thinking about how consumers respond to online retail and resale in the near and more distant future is one of these.
Future directions
Let's ditch the high street for the information highway;
One girl's trash is another girl's treasure;
Trading with a greener mindset;
Online shopping continues to be popular with the stressed and the busy;
More wanting to run their own show;
Fear holding back some consumers.
New business openings
Local intranet
100%

C&C—Population and homes (1997-2020)

- Births
- Crime
- Death
- Dependency ration
- Foreign citizens
- Home ownership
- Household profiles
- Land area per capita
- Net migration
- Population density
- Average age of population
- Population: National estimates at January 1st

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(1977-2020)

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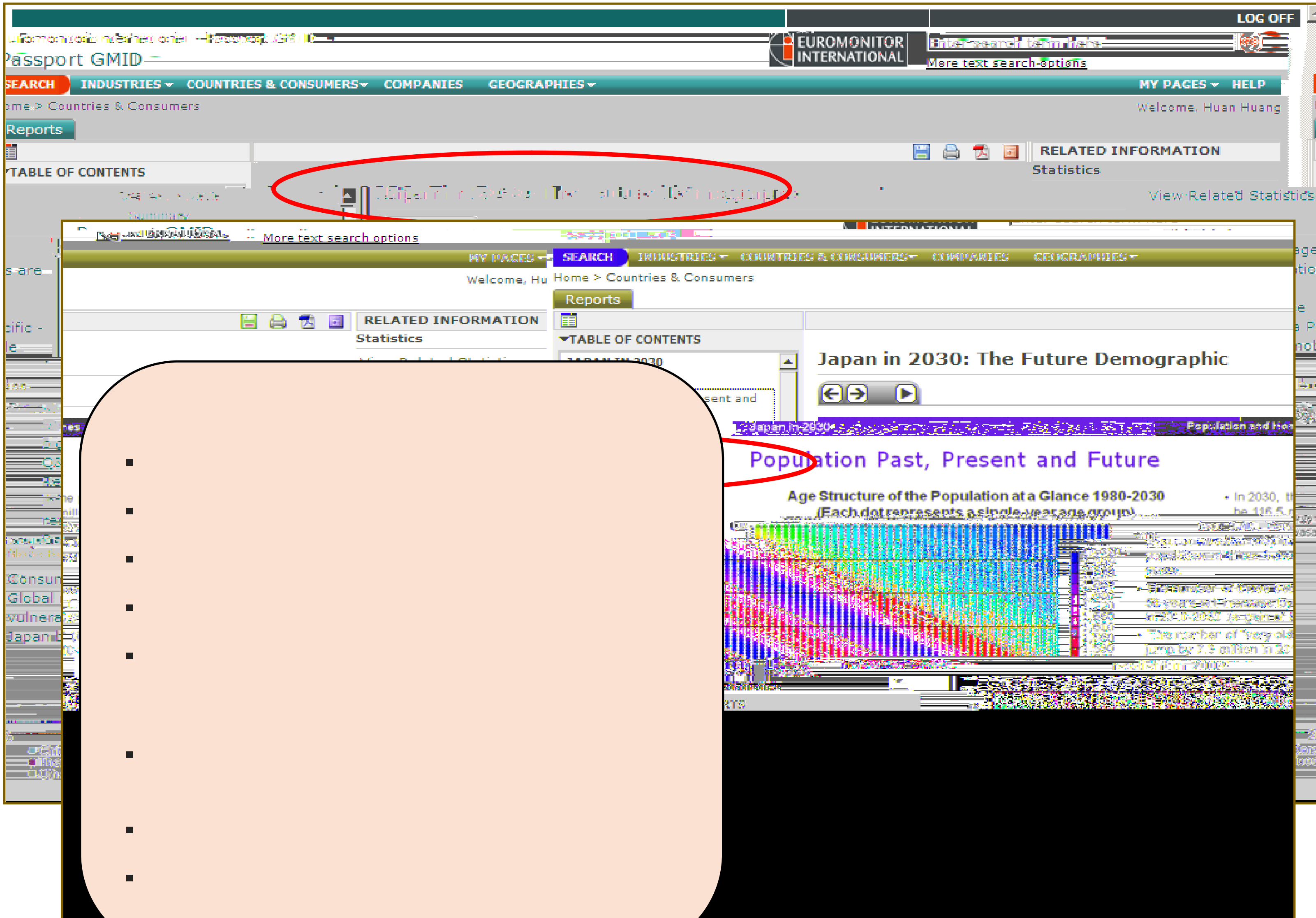
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Population Past, Present and Future
Age Structure of the Population at a Glance 1980-2030

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C&C—Consumer trends and lifestyle

Web2.0

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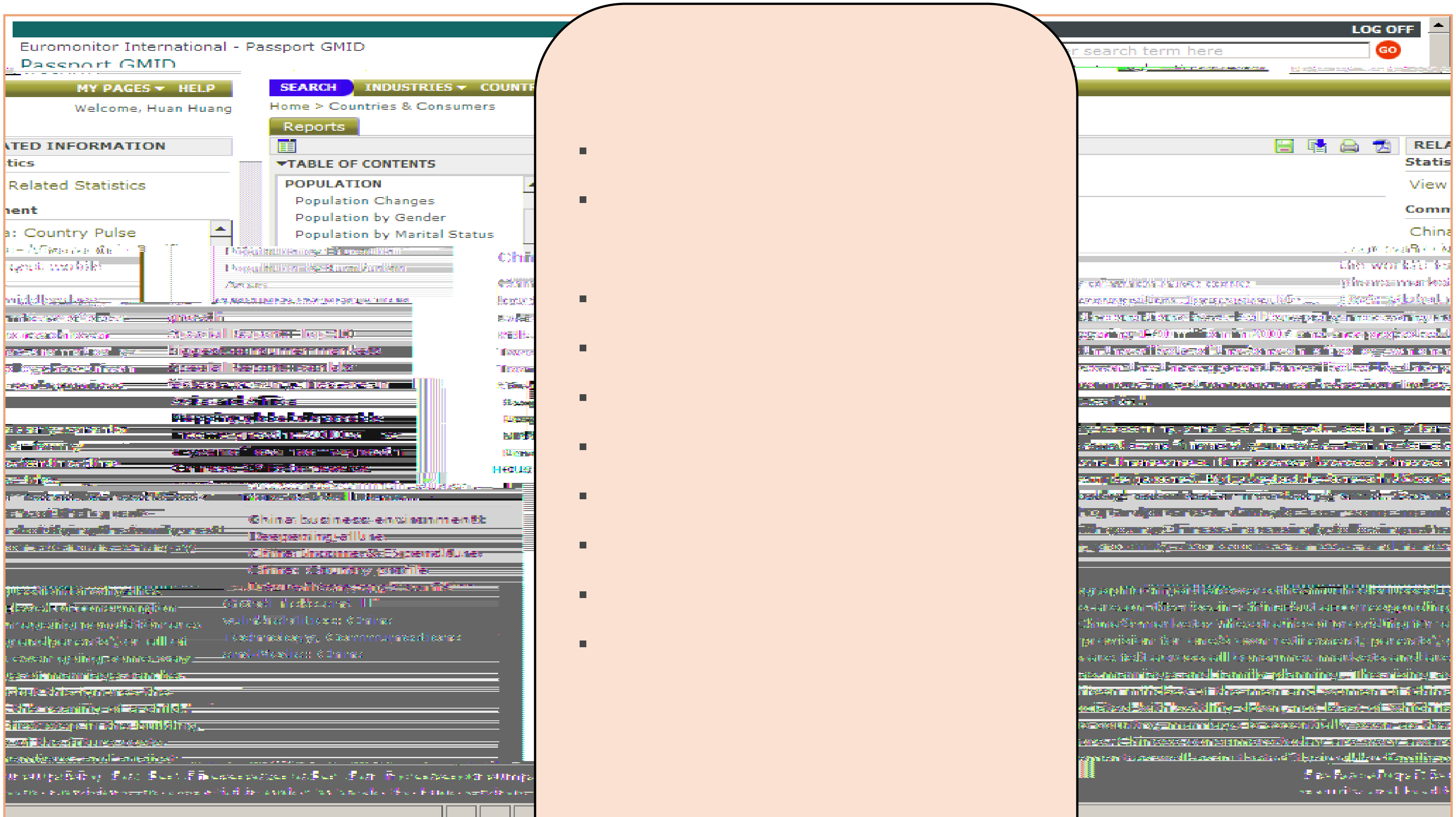
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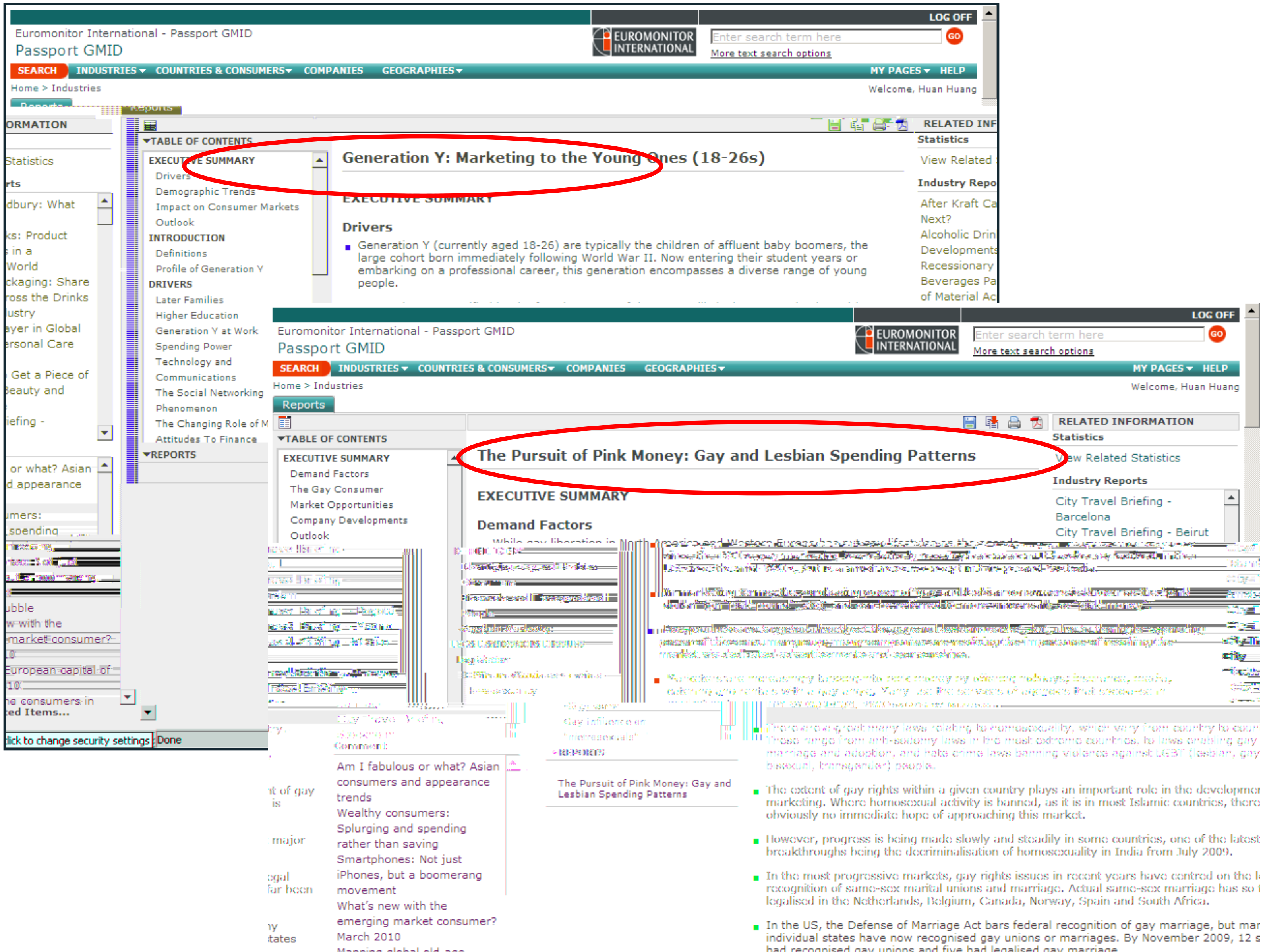
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Higher Education
Generation Y at Work
Spending Power
Technology and Communications
The Social Networking Phenomenon
The Changing Role of M
Attitudes To Finance
REPORTS
Generation Y: Marketing to the Young Ones (18-26s)
EXECUTIVE SUMMARY
Drivers
Generation Y (currently aged 18-26) are typically the children of affluent baby boomers, the large cohort born immediately following World War II. Now entering their student years or embarking on a professional career, this generation encompasses a diverse range of young people.
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Market Opportunities
Company Developments
Outlook
The Pursuit of Pink Money: Gay and Lesbian Spending Patterns
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City Travel Briefing - Beirut
Am I fabulous or what? Asian consumers and appearance trends
Wealthy consumers: Splurging and spending rather than saving
Smartphones: Not just iPhones, but a boomerang movement
What's new with the emerging market consumer?
March 2010
Mapping global old-age
The Pursuit of Pink Money: Gay and Lesbian Spending Patterns
The extent of gay rights within a given country plays an important role in the development marketing. Where homosexual activity is banned, as it is in most Islamic countries, there obviously no immediate hope of approaching this market.
However, progress is being made slowly and steadily in some countries, one of the latest breakthroughs being the decriminalisation of homosexuality in India from July 2009.
In the most progressive markets, gay rights issues in recent years have centred on the recognition of same-sex marital unions and marriage. Actual same-sex marriage has so legalised in the Netherlands, Belgium, Canada, Norway, Spain and South Africa.
In the US, the Defense of Marriage Act bars federal recognition of gay marriage, but man individual states have now recognised gay unions or marriages. By November 2009, 12 s had recognised gay unions and five had legalised gay marriage.
Click to change security settings
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TOP DOWN

GLOBAL AND REGIONAL ANALYSIS
BY INDUSTRY EXPERT TEAMS

INDUSTRY TREND MONITORING

- International industry sources
- Relationships with industry players
- Cross-border trend movements

COMPANY ANALYSIS

- Global and regional sizes and shares
- Multinational company profiles and brand ownership
- Draws on wealth of country research

DATA STANDARDISATION

- Consolidation and reconciliation
- Comparative analysis across countries
- Checking and validation

TRADE SURVEYS

- Suppliers, manufacturers, distributors, retailers, industry bodies
- Exchange of interpretations
- Consensus building
- Qualitative as well as quantitative issues

DESK RESEARCH

- National statistical offices, trade data
- Trade associations, trade press
- Annual accounts and reports, broker reports
- Business and financial press

STORE CHECKS

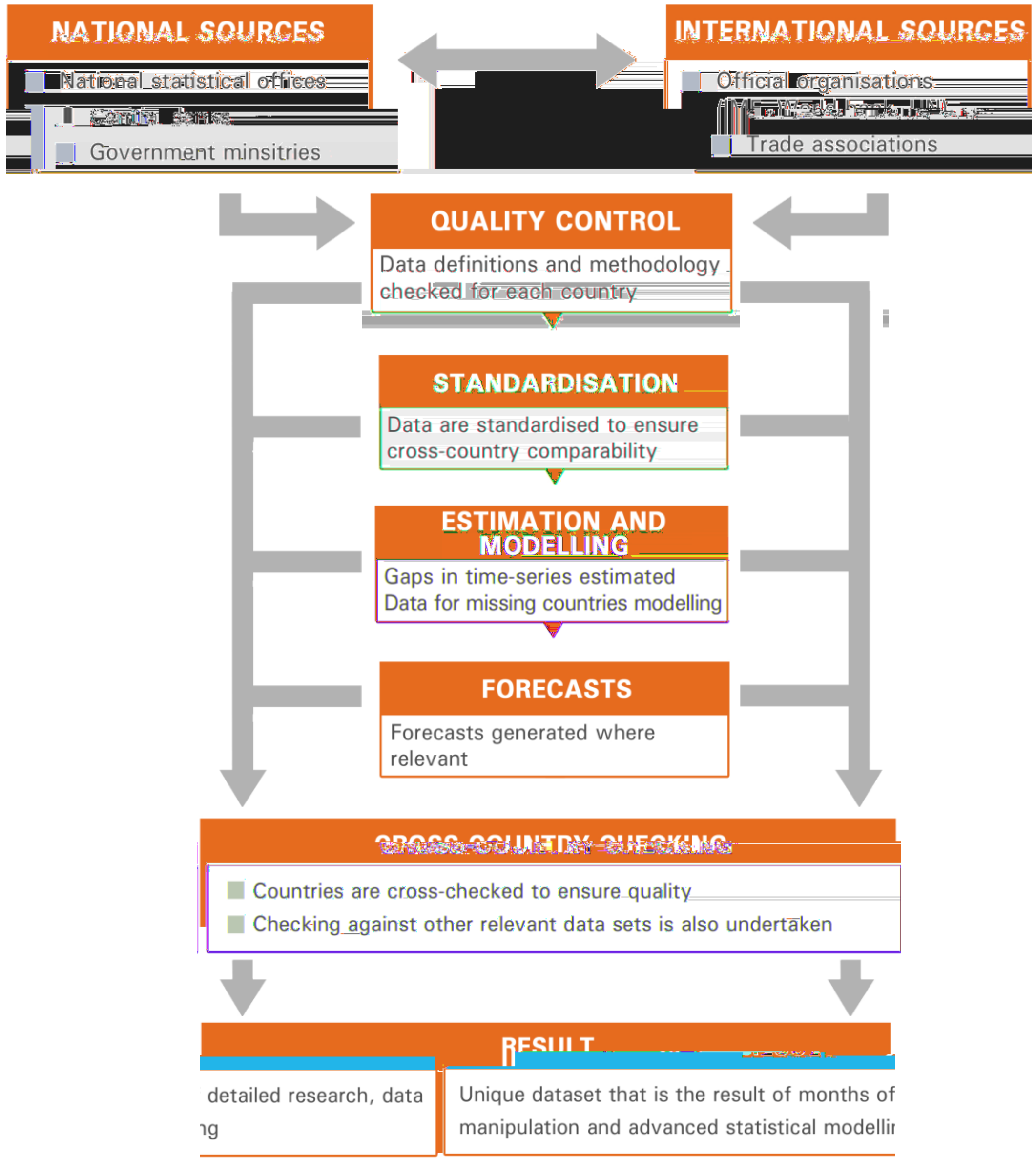
- All relevant distribution channels
- Product availability
- Company and brand presence
- Pricing, packaging, promotions

INTERNAL AUDIT

- Search and review existing Euromonitor International research
- Context and contacts for new annual update project

NATIONAL MARKET ANALYSIS
IN 80 COUNTRIES WORLDWIDE

BOTTOM UP


NATIONAL SOURCES
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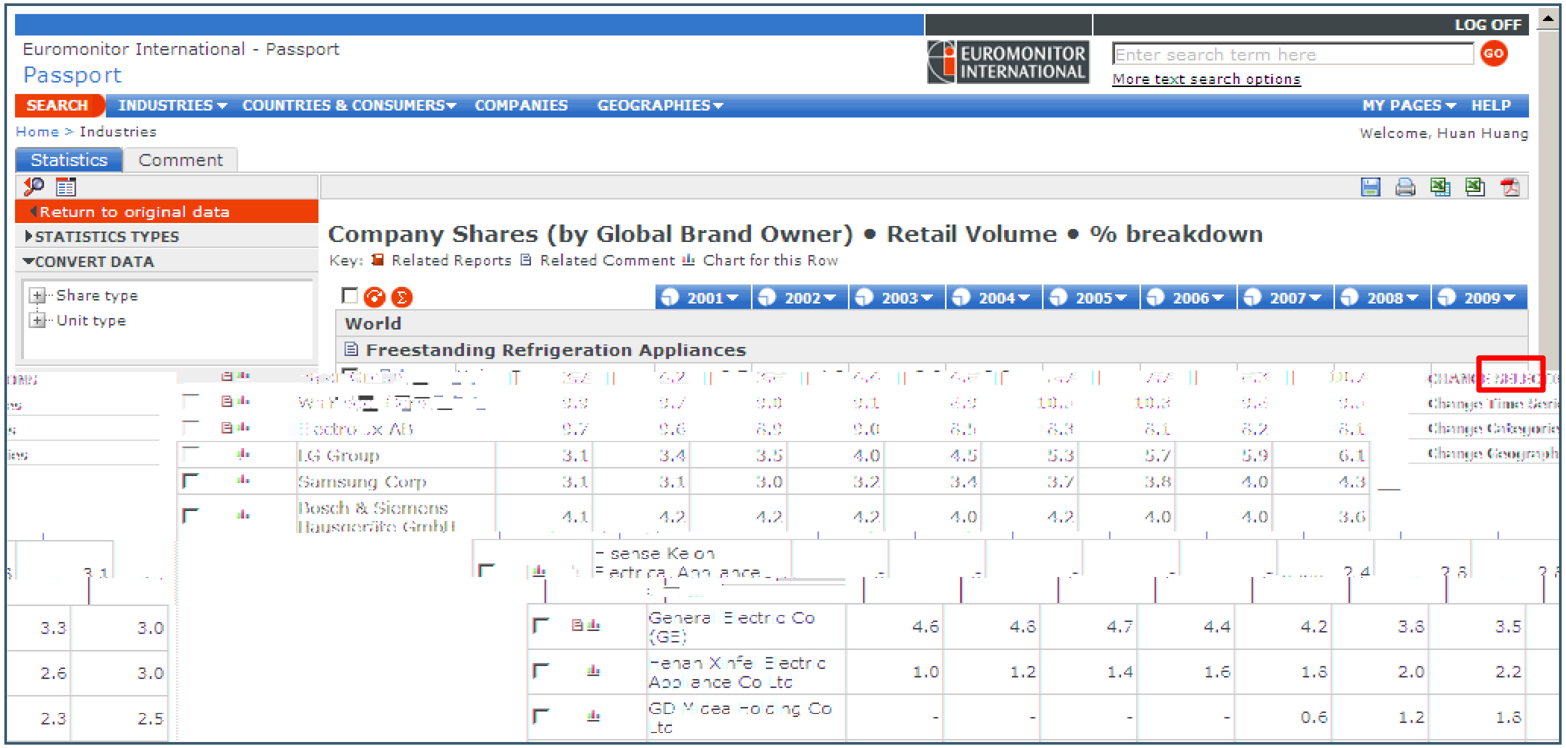
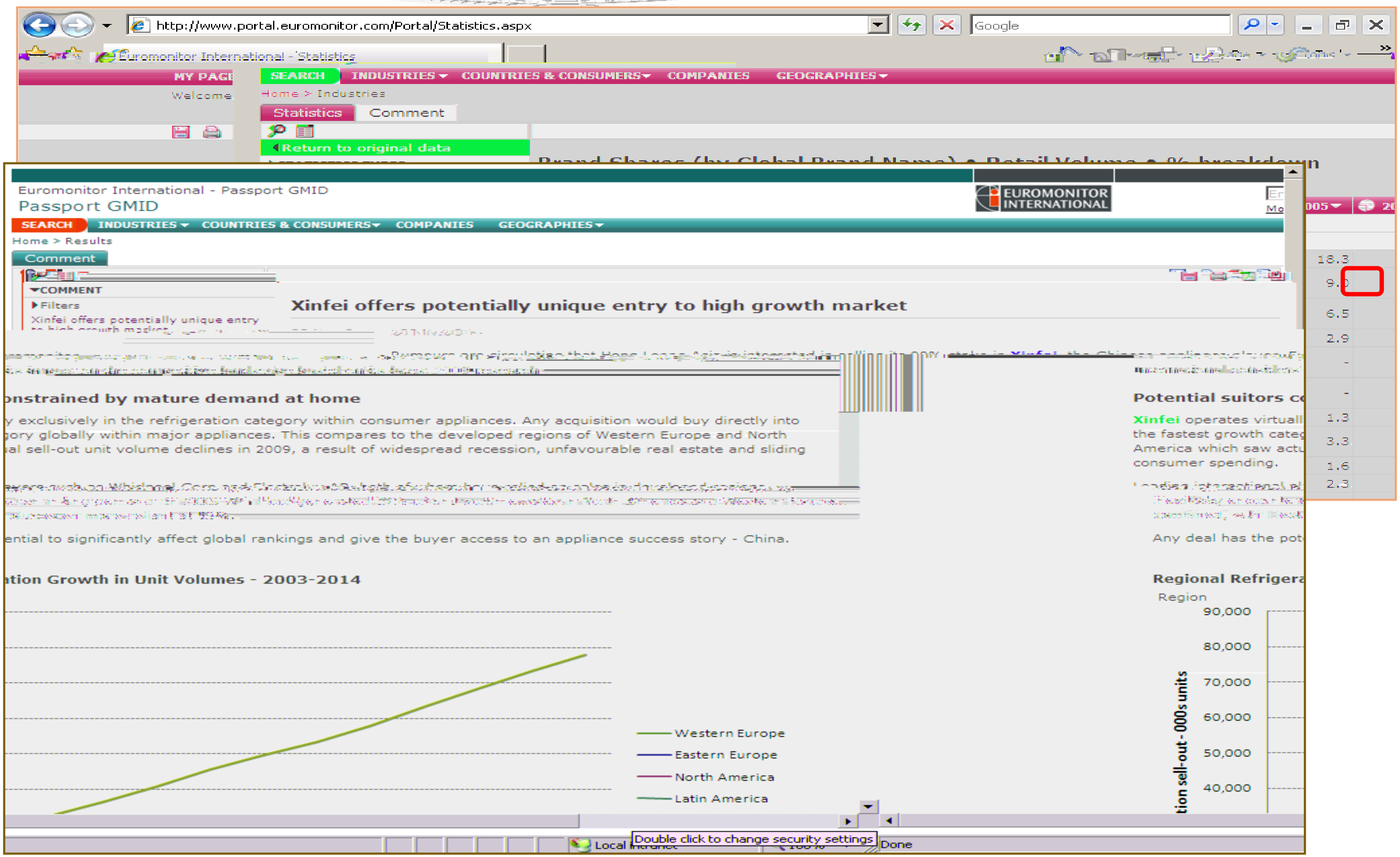
Government minsitries
INTERNATIONAL SOURCES
Official organisations
Trade associations
QUALITY CONTROL
Data definitions and methodology checked for each country
STANDARDISATION
Data are standardised to ensure cross-country comparability
ESTIMATION AND MODELLING
Gaps in time-series estimated
Data for missing countries modelling
FORECASTS
Forecasts generated where relevant
Countries are cross-checked to ensure quality
Checking against other relevant data sets is also undertaken
RESULT
detailed research, data
Unique dataset that is the result of months of
manipulation and advanced statistical modellir

Let us start with some fun facts…

- **2009** ?

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Xinfei offers potentially unique entry
Xinfei offers potentially unique entry to high growth market
onstrained by mature demand at home
y exclusively in the refrigeration category within consumer appliances. Any acquisition would buy directly into
gory globally within major appliances. This compares to the developed regions of Western Europe and North
al sell-out unit volume declines in 2009, a result of widespread recession, unfavourable real estate and sliding
ential to significantly affect global rankings and give the buyer access to an appliance success story - China.
tion Growth in Unit Volumes - 2003-2014
Western Europe
Eastern Europe
North America
Latin America
Potential suitors c
Xinfei operates virtuall
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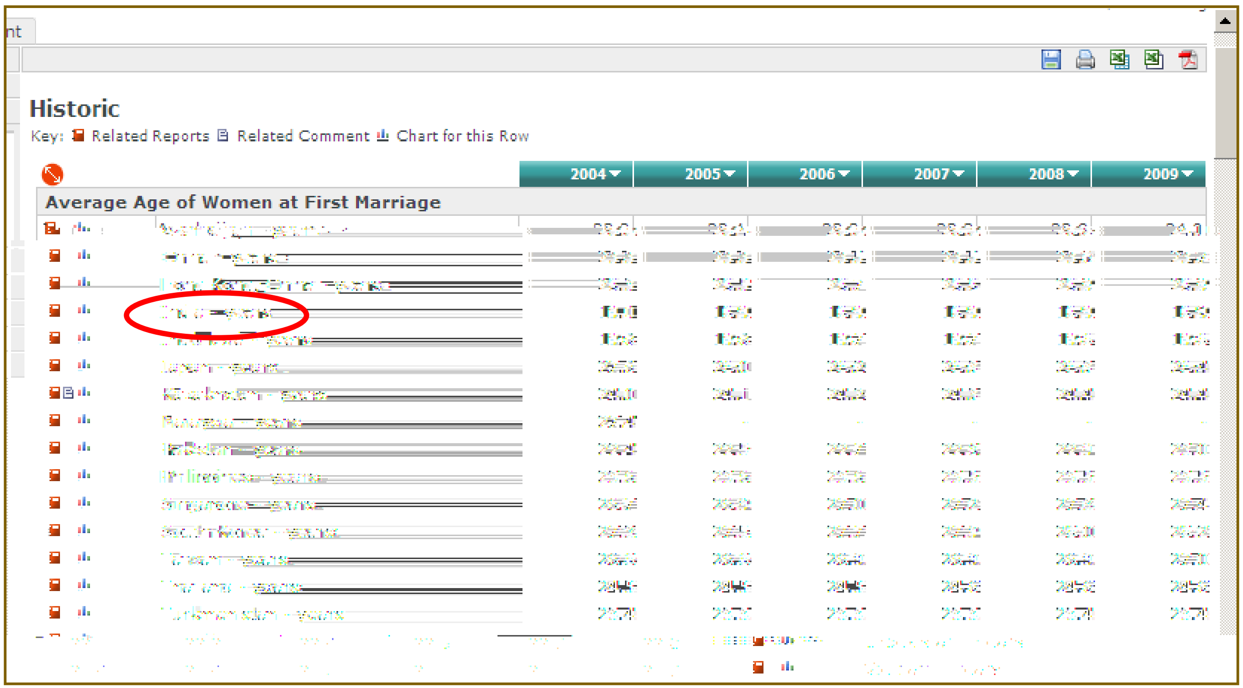
Let us start with some fun facts…



Let us start some applications

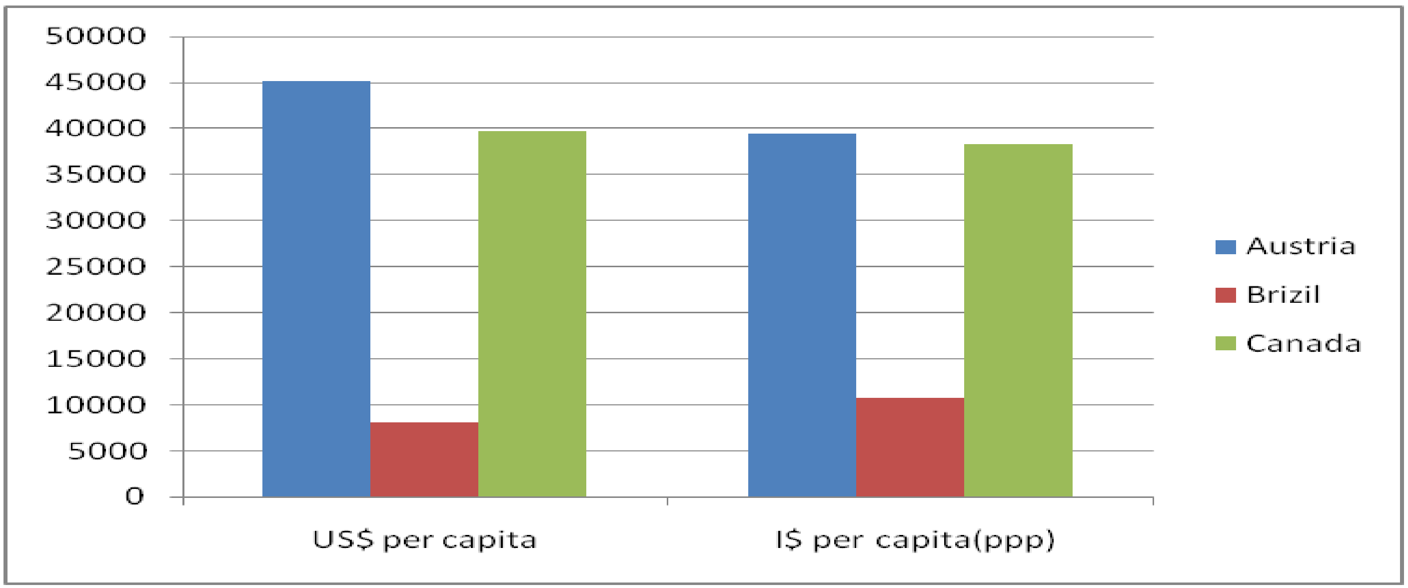
C&C-GDP In Australia, Brizil , Canada

Market Sizes • Historic • Value at Current Prices

Key: Related Reports Related Comment Chart for this Row

	2004	2005	2006	2007	2008	2009
Australia						
Total GDP - A$ mn	894,921.0	966,153.0	1,042,160.0	1,133,620.0	1,242,240.0	1,262,811.8
GDP Measured at Purchasing Power Parity - mn international $	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Brazil						
Total GDP - R$ mn	1,941,498.0	2,147,238.0	2,369,797.0	2,661,344.0	3,004,[illegible]	
GDP Measured at Purchasing Power Parity - mn international $	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	
Canada						
Total GDP - C$ mn	1,290,180.0	1,368,730.0	1,439,290.0	1,531,430.0	1,6[illegible]	
GDP Measured at Purchasing Power Parity - mn international $	1,065,384.0	1,127,454.7	1,194,431.5	1,266,691.5	1,3[illegible]	

Category definitions | Calculation variables



1.Total GDP: Euromonitor International from International Monetary Fund (IMF), International Financial Statistics
2.Real GDP Growth: Euromonitor International from International Monetary Fund (IMF), International Financial Statistics and World Economic Outlook/UN/national statistics

C&C –Exports of Netherland

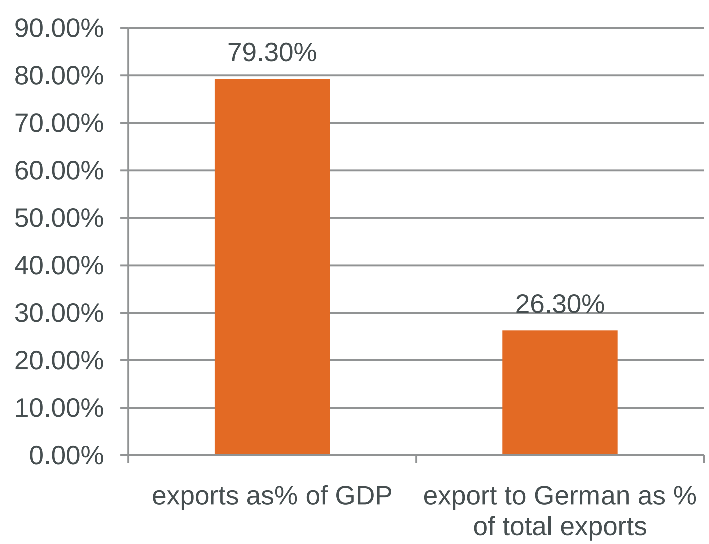
Market Sizes • Historic • Value at Current Prices

Key: Related Reports Related Comment Chart for this Row

Netherlands	2004	2005	2006	2007	2008	2009
Total GDP - € mn	491,184.0	513,407.0	540,216.0	568,664.0	595,883.0	569,402.0
Exports of Goods and Services - € mn	326,111.0	357,453.0	393,475.0	425,319.0	456,999.0	451,816.1
Exports (fob) to Germany - US$ mn	79,862.7	87,029.5	102,001.7	115,408.2	138,905.3	118,689.1

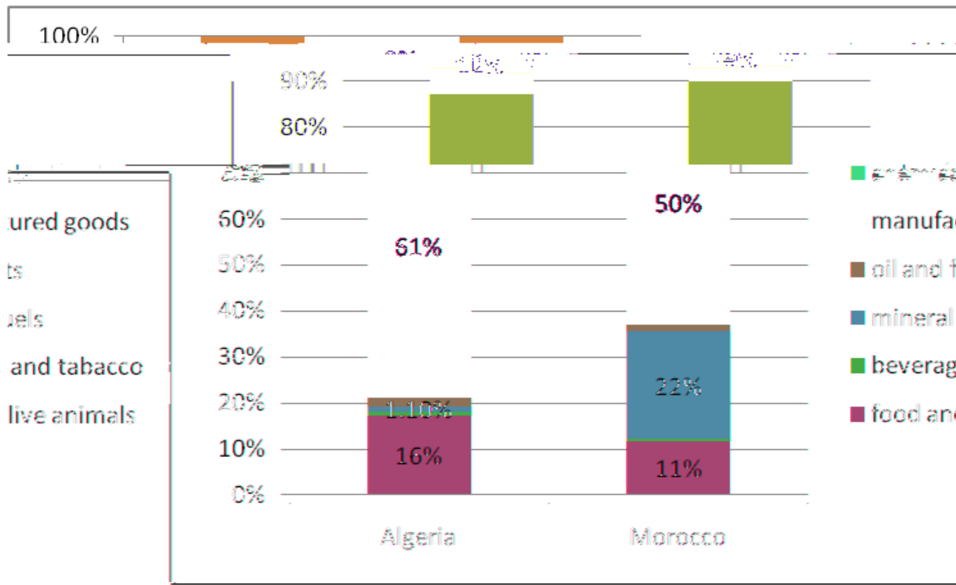
Category definitions | Calculation variables

Sources:
1. Exports (fob) to Germany: International Monetary Fund (IMF), Direction of Trade Statistics
2. Exports of Goods and Services: International Monetary Fund (IMF), International Financial Statistics
3. Total GDP: Euromonitor International from International Monetary Fund (IMF), International Financial Statistics



C&C –Imports of Algeria ,Morocco

Imports	17,954.0	19,857.0	21,010.0	27,439.0	39,156.0	34,544.0
Imports (cif) of Food and Live Animals, SITC Classification 0	3,489.5	3,438.0	3,542.9	4,760.7	6,522.5	5,746.7
Imports (cif) of Beverages and Tobacco, SITC Classification 1	34.3	57.4	96.4	149.1	258.7	232.5
Imports (cif) of Crude Materials Exc. Fuels, SITC Classification 2	451.5	487.4	588.6	809.1	1,211.5	1,076.1
Imports (cif) of Mineral Fuels, SITC Classification 3	164.3	194.5	234.3	300.5	452.5	401.2
Imports (cif) of Oils and Fats, SITC Classification 4	372.9	311.6	374.8	506.2	692.3	613.0
Imports (cif) of Chemicals, SITC Classification 5	2,150.4	2,373.4	2,527.1	3,221.2	4,566.4	4,025.2
Imports (cif) of Basic Manufactures, SITC [illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]



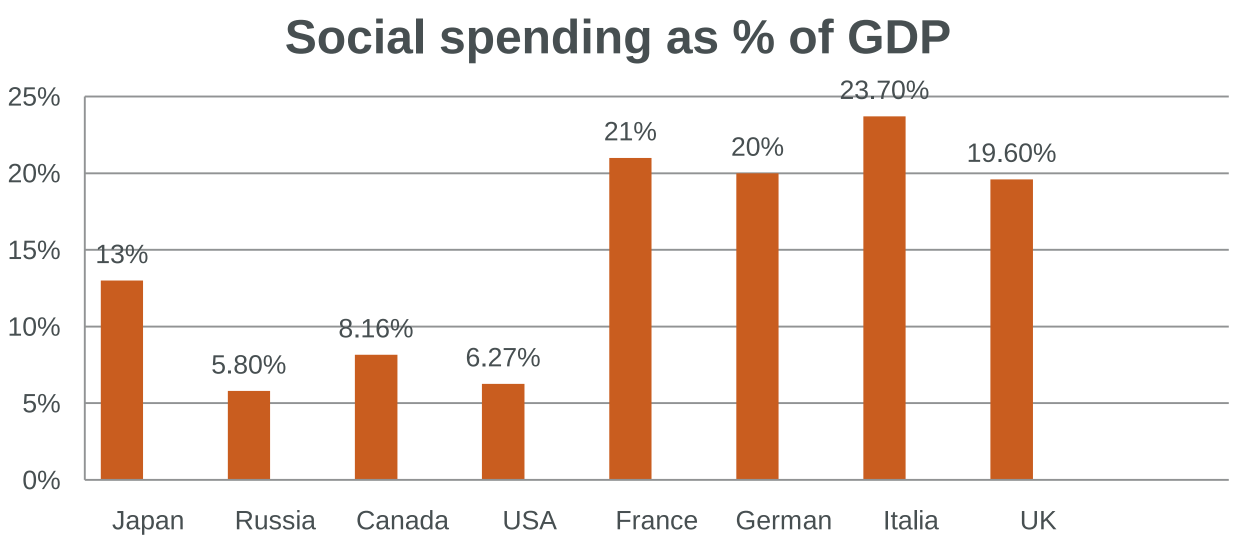
C&C –Government spending

Market Sizes • Historic • US$ mn • Fixed 2009 Exchange Rates • Value at Current Prices

Key: Related Reports Related Comment Chart for this Row

	2004	2005	2006	2007	2008	2009
Total GDP						
Japan	5,328,708.3	5,365,130.3	5,425,335.0	5,512,545.3	5,401,246.5	5,078,441.2
Russia	536,755.1	680,868.4	847,048.5	1,042,502.1	1,311,905.8	1,210,098.9
Canada	1,131,469.4	1,200,356.7	1,262,236.8	1,343,042.2	1,405,343.3	1,336,572.3
USA	11,867,700.0	12,638,400.0	13,398,900.0	14,077,600.0	14,441,400.0	14,299,909.4
France	2,306,695.5	2,398,231.2	2,509,904.0	2,632,467.1	2,708,477.3	2,660,654.9
Germany	3,071,892.6	3,115,381.8	3,230,565.6	3,373,815.9	3,467,741.5	3,311,013.7
Italy	1,933,435.0	1,986,162.6	2,063,829.0	2,146,552.7	2,184,522.9	2,118,629.2
United Kingdom	1,876,051.5	1,955,746.8	2,067,623.2	2,181,604.9	2,258,817.4	2,176,266.1
Government Expenditure on Social Security and Welfare						
Japan	636,850.6	648,012.6	659,040.3	670,964.6	683,374.3	661,348.0
Russia	43,470.9	48,905.2	56,313.5	69,994.2	80,010.9	69,650.8
Canada	95,267.0	99,976.4	104,063.1	109,903.8	114,268.4	109,149.8
USA	760,600.0	805,000.0	842,800.0	881,500.0	913,733.2	897,402.5
France	496,271.3	516,305.5	539,510.4	563,197.4	582,880.8	576,127.2
Germany	676,097.0	690,922.3	687,129.1	687,115.2	689,134.4	671,519.5
Italy	432,627.1	443,641.1	464,033.8	492,173.9	512,208.1	502,372.3
United Kingdom	384,136.5	399,464.8	411,285.5	429,009.9	440,031.3	425,948.9

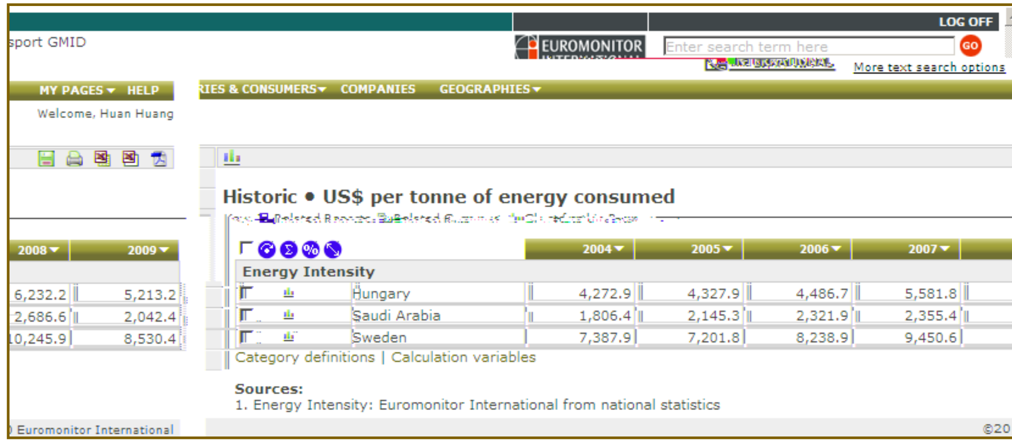
Category definitions | Calculation variables

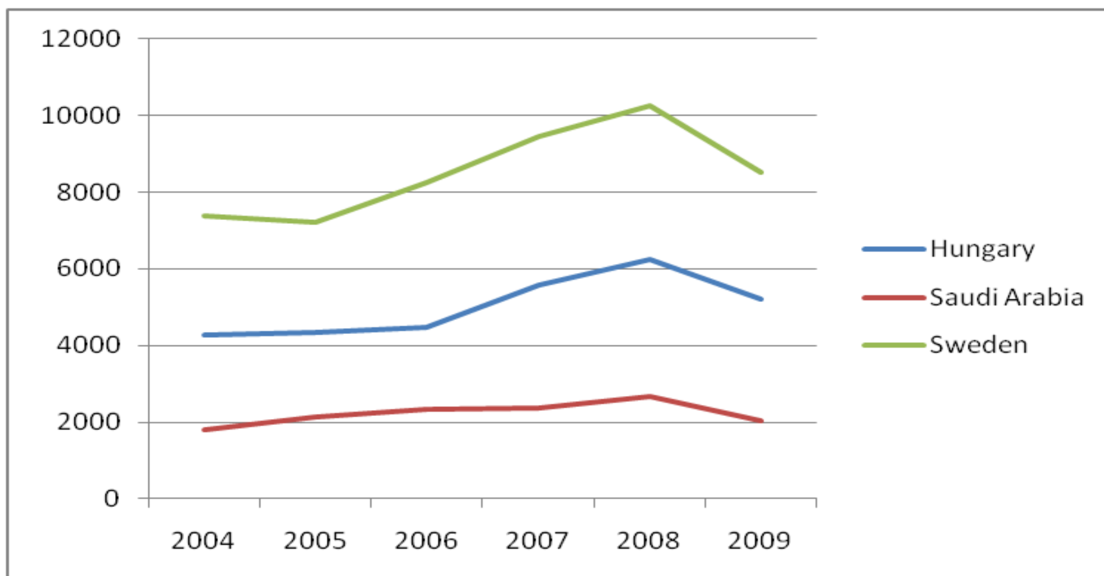


C&C—Energy intensity

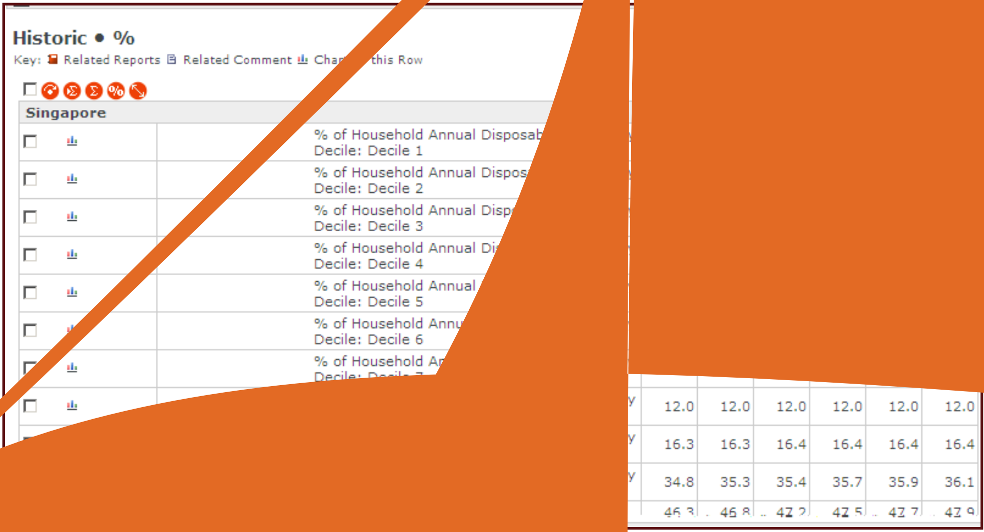
Energy Intensity

Indicates the value of gross domestic product produced per tonne of oil equivalent of energy consumed.





C&C-- Income distribution of households in singapore



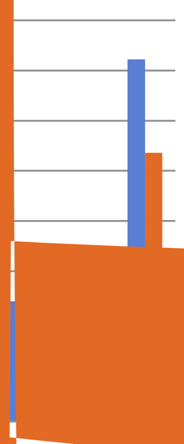
Historic • %

Key: Related Reports Related Comment Char this Row

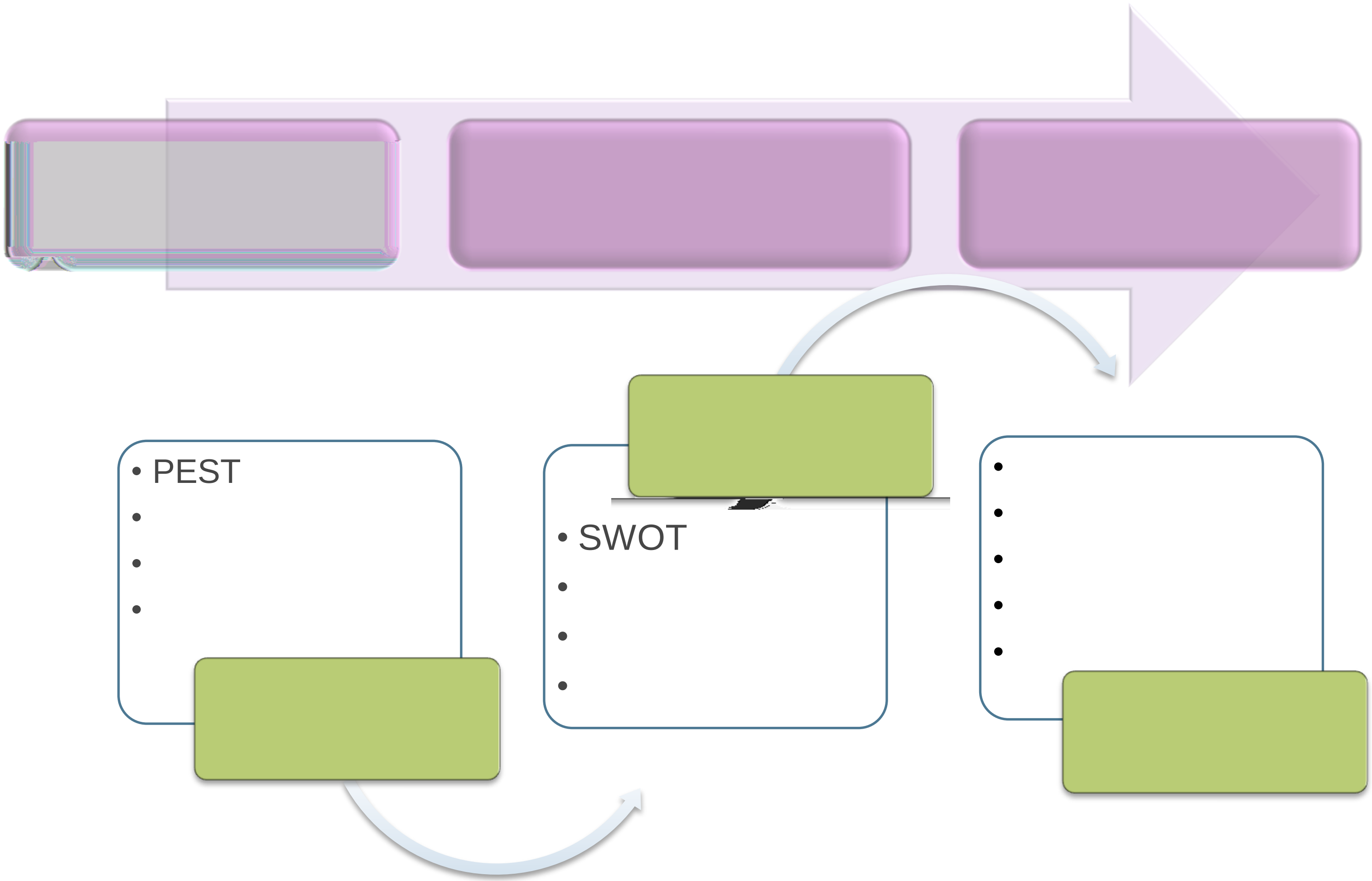
Singapore

% of Household Annual Disposab Decile: Decile 1						
% of Household Annual Dispos Decile: Decile 2						
% of Household Annual Disp Decile: Decile 3						
% of Household Annual Di Decile: Decile 4						
% of Household Annual Decile: Decile 5						
% of Household Annu Decile: Decile 6						
% of Household Ar Decile: Decile 7						
	12.0	12.0	12.0	12.0	12.0	12.0
	16.3	16.3	16.4	16.4	16.4	16.4
	34.8	35.3	35.4	35.7	35.9	36.1
	46.3	46.8	47.2	47.5	47.7	47.9

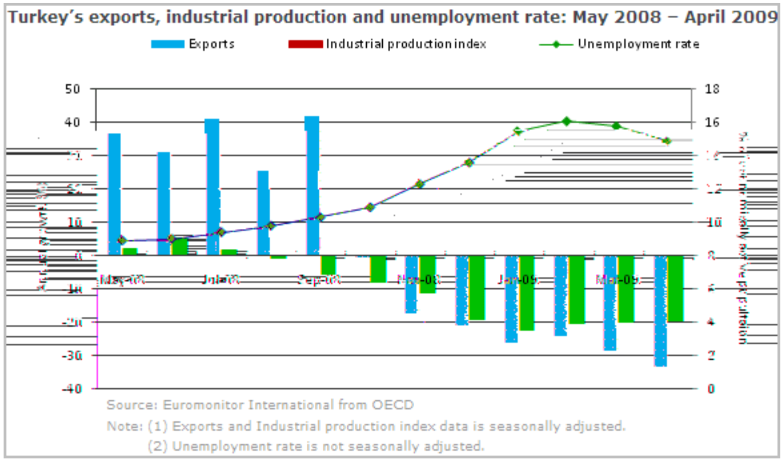
47 35.2%



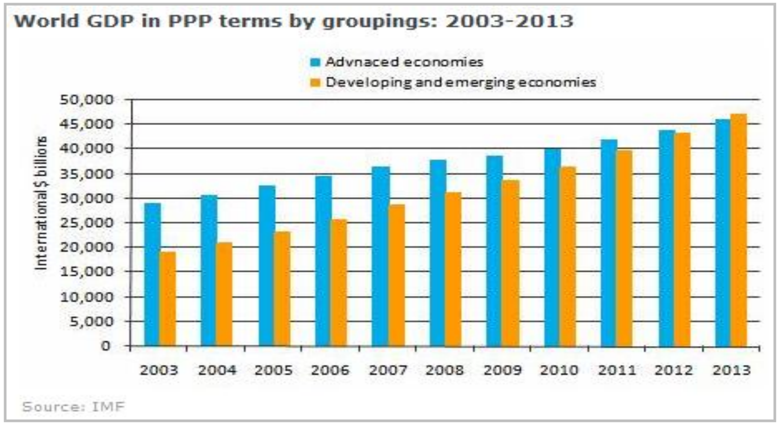
20.0


PEST
SWOT

Euromonitor takes a methodical approach to gathering, normalizing and forecasting the best sources for economic indicators from around the World. Clients use our cross-country comparable statistics and matching analysis with confidence as they make critical decisions regarding market opportunity and risk.



Real GDP contracted by 4.2% in Q1 2009 on top of the 4.6% decline in the previous quarter. With global demand for Turkish exports and industrial production dropping, the economy is expected to shrink by 5.1% in 2009.



By 2013, China and India are set to reach 20.3% of world GDP measured at purchasing power parity.

Euromonitor provides exceptional detail regarding the composition of international economies. Clients use datasets such as GDP by Origin to assess the comparative attractiveness regarding product sales and the development of operations.

Market Sizes • Historic • US$ mn • Fixed 2008 Exchange Rates • Value at Current Prices • Period Growth

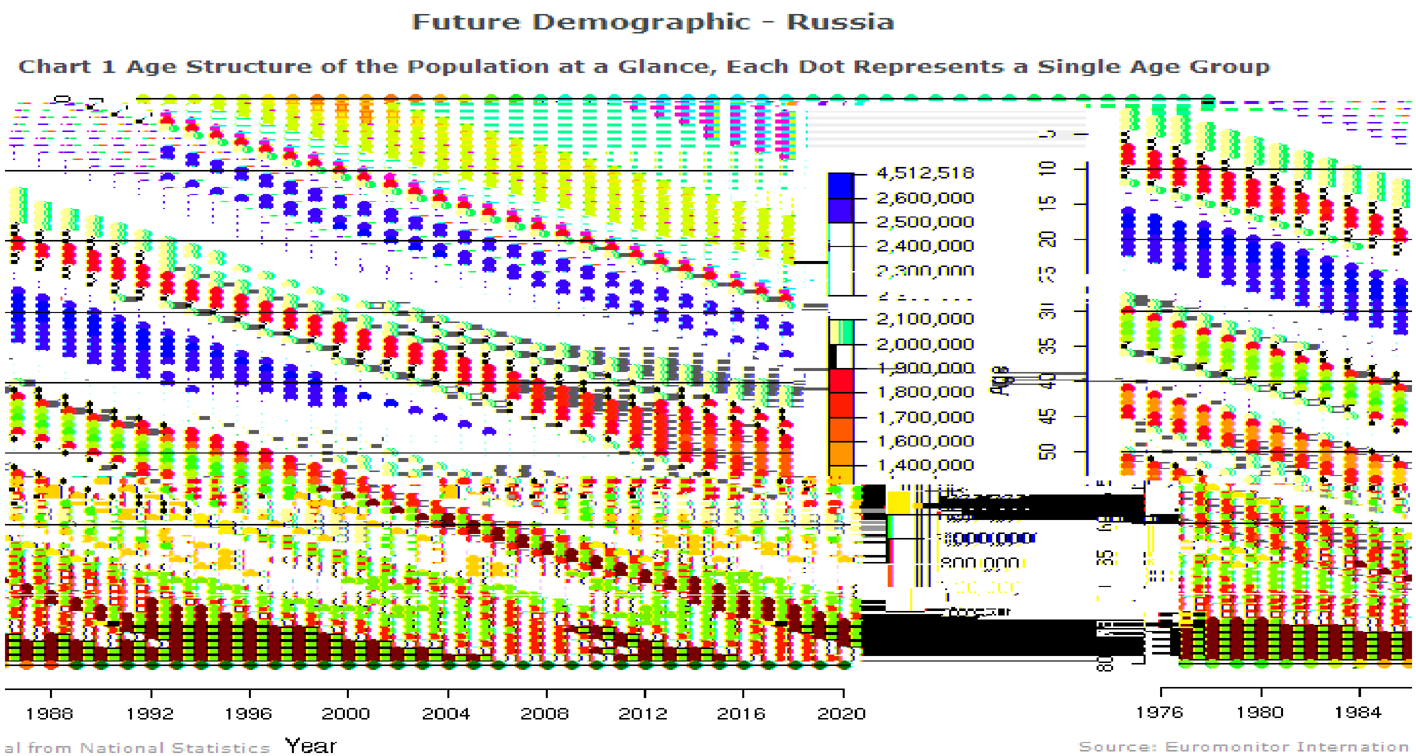
2003-08 Absolute

Germany	
GDP from real estate, renting and business activities	125,045.8
GDP from manufacturing	111,095.8
GDP from electricity, gas and water supply	38,866.1
GDP from health and social work	28,567.4
GDP from wholesale trade and commission trade, except of motor vehicles and motorcycles	24,713.5
GDP from financial intermediation	21,715.4
GDP from supporting and auxiliary transport activities; activities of travel agencies	15,911.1
GDP from education	14,093.6
GDP from retail trade, except of motor vehicles and motorcycles; repair of personal and household goods	13,301.5
GDP from other community, social, personal service activities	13,264.6
GDP from sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel	8,485.9
GDP from hotels and restaurants	7,984.9
GDP from water transport	7,667.3
GDP from post and telecommunications	4,204.7
GDP from air transport	2,260.6
GDP from public administration and defence; compulsory social security	1,877.3
GDP from activities of households	1,553.3
GDP from mining and quarrying of energy producing materials	1,146.6
GDP from mining and quarrying except energy producing materials	695.0
GDP from fishing	24.4
GDP from land transport; transport via pipelines	-1,974.0
GDP from construction	-2,790.7
GDP from agriculture, hunting and forestry	-4,057.0
Total	433,653.3

definitions Category

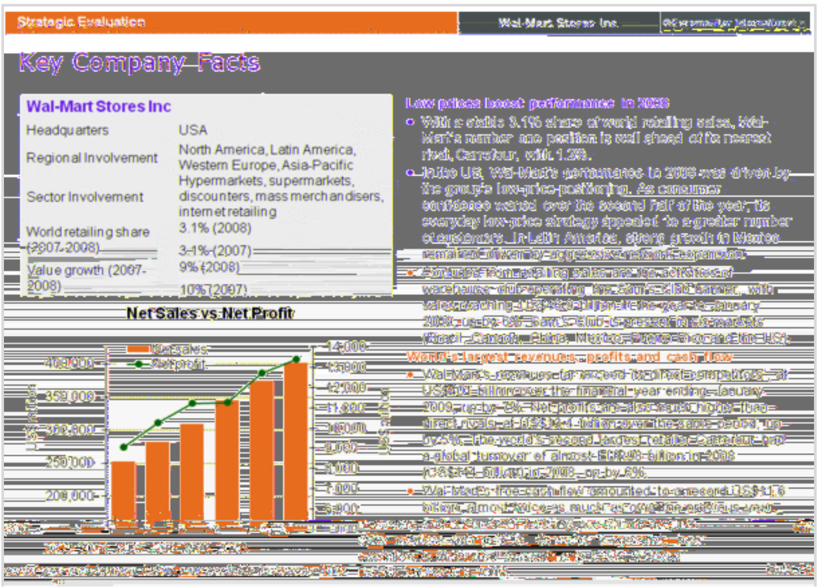
From 2003 to 2008, Germany's economy (GDP by Origin) grew by $433.6b.

The growth was largely driven by a $125b increase in 'GDP from real estate, renting and business activities' and a $111b increase in 'GDP from manufacturing.'



From 2008 to 2013, Russia's population is forecasted to decrease by over 1m people. The largest reduction is expected within the 15 to 19 year olds (less 3.2m).

Euromonitor offers unique insight regarding the global strategy and local operations of leading retailers and manufacturers. Clients use our company intelligence for long-term planning and market-by-market execution.


Strategic Evaluation | Wal-Mart Stores Inc | © Euromonitor International

Key Company Facts

Wal-Mart Stores Inc

Headquarters	USA
Regional Involvement	North America, Latin America, Western Europe, Asia-Pacific
Sector Involvement	Hypermarkets, supermarkets, discounters, mass merchandisers, internet retailing
World retailing share (2007-2008)	3.1% (2008) 3.1% (2007)
Value growth (2007-2008)	9% (2008) 10% (2007)

Net Sales vs Net Profit

Low prices boost performance in 2008

- With a stable 3.1% share of world retailing sales, Wal-Mart's number one position is well ahead of its nearest rival, Carrefour, with 1.2%.
- In the US, Wal-Mart's performance in 2008 was driven by the group's low-price positioning. As consumer confidence waned over the second half of the year, its everyday low-price strategy appealed to a greater number of customers.

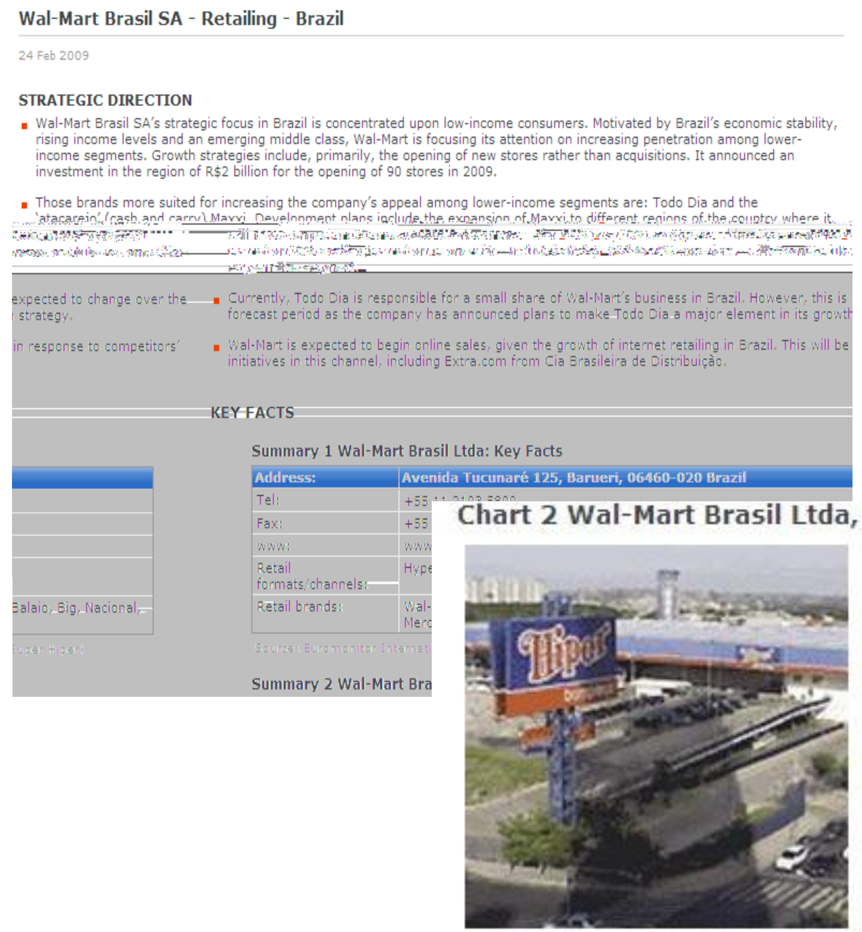
World's largest revenues, profits and cash flow


Strategic Evaluation | Wal-Mart Stores Inc | © Euromonitor International

SWOT – Wal-Mart Stores Inc

Sheer scale and size of profits	Low-price positioning and operating costs	Relies heavily on US market and global reach remains limited	Focus on large store formats
An unchallenged position as the world's largest retailer gives a competitive advantage in terms of the scale of operations and profits. This also grants Wal-Mart unrivalled bargaining power when dealing with suppliers	A low-price positioning will be an advantage for the company during the global economic crisis. Low operating costs combined with efficient logistics allow the group to retain healthy margins while keeping prices low	Wal-Mart relies strongly on the mature US market where expansion prospects are modest and is not present in numerous fast-growing emerging markets in Eastern Europe and Asia Pacific	The dependence on saturated large retail formats such as hypermarkets and mass merchandisers remains important, in contrast to a modest presence in formats with higher growth prospects such as convenience stores and discounters

Strengths Weaknesses


Wal-Mart Brasil SA - Retailing - Brazil

24 Feb 2009

STRATEGIC DIRECTION

- Wal-Mart Brasil SA's strategic focus in Brazil is concentrated upon low-income consumers. Motivated by Brazil's economic stability, rising income levels and an emerging middle class, Wal-Mart is focusing its attention on increasing penetration among lower-income segments. Growth strategies include, primarily, the opening of new stores rather than acquisitions. It announced an investment in the region of R$2 billion for the opening of 90 stores in 2009.
- Those brands more suited for increasing the company's appeal among lower-income segments are: Todo Dia and the 'atacarejo' (cash and carry) Maxxi. Development plans include the expansion of Maxxi to different regions of the country where it
- Currently, Todo Dia is responsible for a small share of Wal-Mart's business in Brazil. However, this is forecast period as the company has announced plans to make Todo Dia a major element in its growth
- Wal-Mart is expected to begin online sales, given the growth of internet retailing in Brazil. This will be initiatives in this channel, including Extra.com from Cia Brasileira de Distribuição.

KEY FACTS

Summary 1 Wal-Mart Brasil Ltda: Key Facts

Address:	Avenida Tucunaré 125, Barueri, 06460-020 Brazil
Tel:	+55
Fax:	+55
www:	
Retail formats/channels:	Hype
Retail brands:	Wal- Merc

Summary 2 Wal-Mart Bra

Chart 2 Wal-Mart Brasil Ltda,

DATAGRAPHIC

Retailing

THE EFFECT OF THE ECONOMIC DOWNTURN ON GLOBAL RETAILING
Value Growth 2008-2009

EUROMONITOR INTERNATIONAL

Market Sizes • Historic • Retail Value RSP excl Sales Tax • US$ mn • Fixed 2009 Exchange Rates • Value at Current Prices • Year-on-Year Growth (%)

Key: Related Reports Related Comment Company Shares Brand Shares Grocery vs Non-grocery

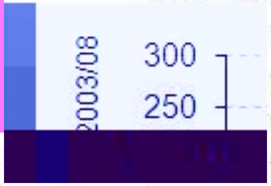
Retailing	2004-05	2005-06	2006-07	2007-08	2008-09
Finland	5.5	4.9	6.4	4.6	-1.7
USA	6.2	5.7	2.4	0.8	-2.2
Israel	4.0	8.3	7.4	5.7	-2.2
Russia	21.8	22.8	22.2	20.1	-2.3
Greece	10.9	6.6	5.0	-0.2	-2.5
Macedonia	6.1	8.3	10.5	10.0	-2.6
Czech Republic	4.0	4.8	4.7	4.1	-2.8
Denmark	6.3	6.0	5.6	0.2	-3.4
Japan	-0.7	-0.8	-0.3	-2.7	-4.0
Georgia	0.3	1.4	2.5	3.0	-6.3
Slovakia	13.6	15.3	15.9	8.8	-6.9
Croatia	6.4	3.5	2.2	1.4	-8.6
Estonia	13.8	19.3	16.2	0.8	-13.9
Latvia	24.0	21.7	17.4	4.2	-15.0
Lithuania	14.5	11.3	18.2	8.0	-16.9

Category definitions | Region definitions | Calculation variables

Sources:
1. Retailing: Euromonitor from trade sources/national statistics

Retailers Increasingly Important Foodservice Players

Conve



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Grocery Retailers Making Serious Push Into Consumer Foodservice

21 Oct 2009

While supermarket and hypermarket retailers have long offered a selection of foodservice items, in recent months a number of high-end operators have taken this a step further, opening working restaurants in new, flagship stores.

This represents the next step in the evolution of supermarket foodservice—rather than simply offering a selection of hot items,

Market Sizes • Historic • Retail Value RSP excl Sales Tax • US$ mn • Fixed 2009 Exchange Rates • Value at Current Prices • Year-on-Year Growth (%)

Key: Related Reports Related Comment Company Shares Brand Shares Grocery vs Non-grocery

	2004-05	2005-06	2006-07	2007-08	2008-09
USA					
Hypermarkets	17.3	14.3	11.4	9.0	7.2
Supermarkets	2.6	0.8	1.5	3.1	3.1
Discounters	6.6	-3.6	11.3	5.0	5.2
Food/Drink/Tobacco Specialists	6.3	9.2	-0.3	-0.9	-4.6
United Kingdom					
Hypermarkets	13.3	10.2	1.9	9.3	7.1
Supermarkets	-2.7	-1.9	0.3	2.3	2.9
Discounters	9.6	9.5	10.9	16.1	13.0
Food/Drink/Tobacco Specialists	-2.0	-1.2	-1.1	-4.8	-2.1

Category definitions | Calculation variables

permarket chains have steadily upgraded their outlets, stocking more premium items, more natural and organic products, and fitting existing outlets with improved furnishings and whole sections devoted to specialty products such as wine and cheese. This end has steadily eroded Whole Foods' competitive advantage, while leaving the chain open to the perception that its products are erpriced relative to the competition. The new, expanded focus on foodservice and other amenities represents Whole Foods' effort to claim the high ground, offering an experience fundamentally different to that found at any other local gro

Future Trends

- Number singles and one-person households to rise gradually to 2012, with fastest growth in emerging markets
- Growth will stem from higher number of women in work and education; increasing wealth; lower birth

Historic • number Per Capita

Key: Related Reports | Related Comment | Chart for this Row

Passenger cars in use	2003	2004	2005	2006	2007	2008
China	0.0	0.0	0.0	0.0	0.0	0.0
Pakistan	0.0	0.0	0.0	0.0	0.0	0.0
United Arab Emirates	0.2	0.3	0.3	0.3	0.3	0.4
Zimbabwe	0.0	0.0	0.0	0.0	0.0	0.0
Canada	0.6	0.6	0.6	0.6	0.6	0.6

Category definitions | Region definitions | Calculation variables

Sources:

1. Passenger cars in use: European Automobile Manufacturers' Association (ACEA) / International Road Federation (IRF)

discourage growth of single households, eg by introducing occupancy taxes or promoting shared or community housing schemes

- Growth in singles will lead to higher number of city apartments, offering opportunities for marketers of compact furniture & appliances

Market Sizes • Historic • Outstanding Balance • US$ Per Capita • Fixed 2009 Exchange Rates • Value at Current Prices

Key: Related Reports Related Comment Chart for this Row Non-performing vs Others loans

	2004	2005	2006	2007	2008	2009
China						

Market Sizes • Historic • Retail Value RSP • US$ Per Capita • Fixed 2009 Exchange Rates • Value at Current Prices

Key: Related Reports Related Comment Chart for this Row Company Shares Card Expenditure by Location Card Expenditure by Sector Domestic vs Foreign Spend

	2004	2005	2006	2007	2008	2009
China						
Debit Transactions	60.0	80.5	160.9	236.7	287.1	334.0
Credit Card Transactions	16.3	22.7	45.4	88.9	141.9	183.6
Charge Card Transactions	-	-	-	-	-	-
Pre-Paid Transactions	7.6	9.2	12.1	17.0	20.1	22.9
Store Card Transactions	-	-	-	-	-	-
Chile						
Debit Transactions	83.1	96.4	128.0	147.3	194.6	210.1
Credit Card Transactions	156.4	169.2	283.5	535.8	573.1	597.3
Charge Card Transactions	-	-	-	-	-	-
Pre-Paid Transactions	10.0	15.3	42.0	30.6	35.3	[illegible]

	2004	2005	2006	2007	2008	2009
Durables Lending	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Education Lending	346.0	415.3	485.1	579.4	703.5	875.4
Other Personal Lending	2,417.0	2,517.5	2,472.7	2,583.4	2,528.0	2,422.2

Category definitions | Region definitions | Calculation variables

Company Shares (by Global Brand Owner) • Retail Value RSP excl Sales Tax • % breakdown

Retailing

Uzbekistan

	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	0.2	0.2	0.2	0.2	0.3	[illegible]
Toshkent Univermagi TPO OAJ	0.4	0.4	0.4	0.3	0.3	[illegible]
Saf Savdo MChJ	0.2	0.3	0.2	0.3	0.2	[illegible]
Metro Superstore Sarl	0.2	0.2	0.2	0.2	0.2	[illegible]
Megapolis Asia MChJ	0.1	0.1	0.1	0.1	0.1	[illegible]
Mashenko DV ChP	0.1	0.1	0.1	0.1	0.1	[illegible]
Vitek International	0.2	0.2	0.2	0.2	0.2	[illegible]
Grand Farm Medical MChJ	0.0	0.0	0.0	0.0	0.1	[illegible]
Integral Asia MChJ	0.1	0.1	0.1	0.1	0.1	[illegible]
HVS MChJ	0.1	0.1	0.1	0.1	0.1	[illegible]
Indesit Co SpA	0.2	0.1	0.1	0.1	0.1	[illegible]
Kasymov NN ChP	0.1	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

Grocers Increasingly Want to be Everywhere

- As consumers' shopping patterns adapt to their changing working lives and the growth in the number of working women, so people are reducing the number of big shops they do, instead favouring more frequent "top up" shops. Consumers increasingly have the opportunity to shop in a number of different places: edge of town for the large shop, city centre for smaller visits, which leads to a fragmentation of where spending occurs.

Distribution • Retail Value RSP • % breakdown

Key: Related Reports Related Comment Chart for this Row

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Western Europe											
Clothing and footwear											
Store-Based Retailing	93.6	93.4	93.3	93.0	92.9	92.7	92.5	92.3	92.0	91.3	90.9
Grocery Retailers	6.3	6.8	7.3	7.8	8.3	8.8	9.3	9.7	10.1	10.4	10.5
Non-Grocery Retailers	87.3	86.6	86.0	85.2	84.5	83.8	83.2	82.5	81.9	80.9	80.4
Mixed Retailers	13.7	13.5	13.2	12.9	12.5	12.2	12.0	11.8	11.6	11.4	11.4
Clothing and footwear specialist retailers	64.8	64.6	64.5	64.2	64.0	63.8	63.6	63.3	63.2	63.0	62.7
Other Non-Grocery Retailers	8.8	8.5	8.4	8.1	8.0	7.8	7.6	7.5	7.2	6.5	6.3
Non-Store Retailing	6.4	6.6	6.7	7.0	7.1	7.3	7.5	7.8	8.0	8.7	9.1
Homeshopping	6.1	6.2	6.3	6.4	6.2	6.0	5.8	5.6	5.3	5.1	4.9
Internet Retailing	0.1	0.2	0.2	0.4	0.8	1.2	1.6	2.0	2.6	3.4	4.0
Direct Selling	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Category definitions | Calculation variables

Sources:
1. Clothing and Footwear: Euromonitor from trade sources/national statistics

Market Sizes • Historic • Number of Cards • cards Per Capita

Key: Related Reports Related Comment Chart for this Row Company Shares

	2004	2005	2006	2007	2008	2009
Hong Kong, China						
ATM Function	1.8	2.1	2.2	2.2	2.2	2.
Debit Function	1.7	1.8	1.9	2.0	2.1	2.
Credit Function	1.6	1.7	1.9	2.0	2.0	2.
Charge Card Function	0.1	0.1	0.1	0.1	0.1	0.
Pre-Paid Function	1.7	2.0	2.1	2.4	2.6	2.
Store Cards	0.0	0.0	0.0	0.0	0.0	0.
India						
ATM Function	0.0	0.0	0.0	0.1	0.1	0.
Debit Function	0.0	0.0	0.1	0.1	0.1	0.
Credit Function	0.0	0.0	0.0	0.0	0.0	0.
Charge Card Function	0.0	0.0	0.0	0.0	0.0	0.
Pre-Paid Function	0.0	0.0	0.0	0.0	0.0	0.
Store Cards	0.0	0.0	0.0	0.0	0.0	0.
Brazil						
ATM Function	1.3	1.5	1.7	1.9	2.1	2.
Debit Function	0.7	0.9	1.0	1.0	1.1	1.
Credit Function	0.4	0.5	0.6	0.7	0.8	1.
Charge Card Function	0.0	0.0	0.0	0.0	0.0	0.
Pre-Paid Function	0.2	0.2	0.2	0.3	0.3	

0.3	Store Cards	0.3	0.4	0.5	0.6	0.7
0.8	**Chile**					
	ATM Function	0.5	0.6	1.0	1.7	1.8
1.9	Debit Function	0.3	0.3	0.4	0.4	0.5
0.5	Credit Function	0.2	0.2	0.7	1.3	1.3
1.4	Charge Card Function	-	-	-	-	-
-	Pre-Paid Function	0.0	0.1	0.2	0.3	0.3
0.3	Store Cards	0.7	0.8	0.8	0.3	0.3
0.3						

Category definitions | Region definitions | Calculation variables

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- 2700 +
- 18000
- 7500

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Q&A ?