Passport GMID overview
Euromonitor International

March 2010

概述

- 欧睿公司背景简介

  Making sense of global markets

- Passport GMID 数据库

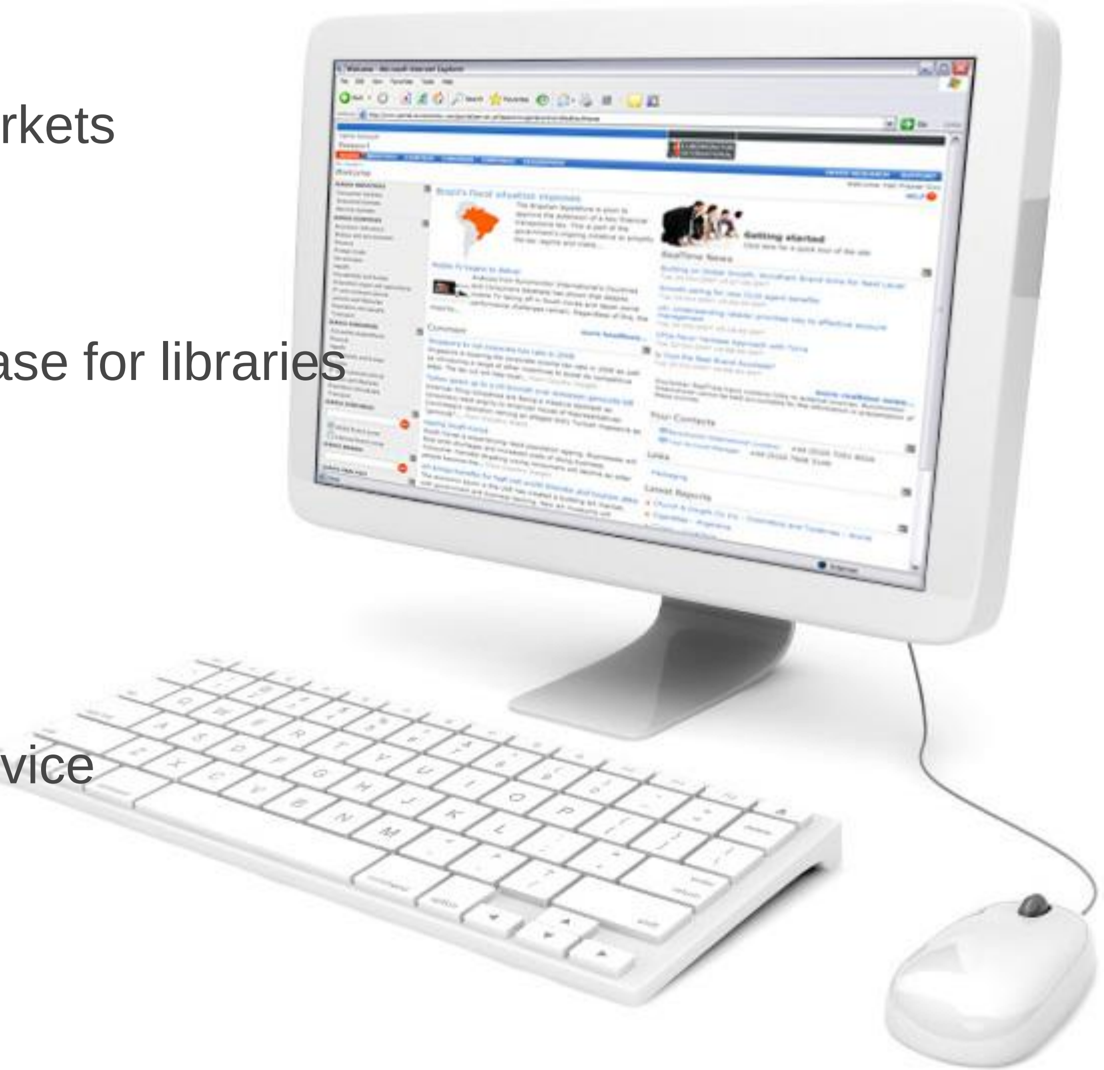
  A wining –business database for libraries

- 研究方法

- GMID数据库应用

  A complete intelligence service

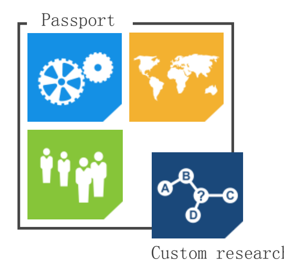
- Q&A



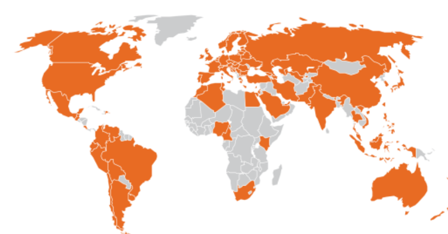
欧睿国际

- 值得信赖的全球商业信息提供商
- 帮助客户制定正确的商业决策

- 关注消费品和消费服务:行业，国家，消费者
- 数据库共享信息和定向研究服务



- **800**多名研究分析师遍布**80**多个国家
- 地区研究中心和行业专家客户支持



产品和服务

行业

- 消费品市场
- 消费者服务业
- **B2B**
- 工业品市场

国家

- 经济
- 人口结构
- 劳动力市场
- 法规和政策

消费者

- 生活方式
- 家庭结构
- 收入和支出
- 社会发展

市场表现和动因

- 发现增长点
- 竞争企业标杆分析
- 发现并购机会
- 分销渠道分析
- 制定价值链策略

影响商业环境的因素

- 追踪经济发展轨迹，展望未来趋势
- 监测人口结构变化
- 掌握劳动力市场动态
- 分析政策对商业的影响

消费者态度，观点，和行为

- 定位消费者群体
- 理解文化差异
- 发现新的消费趋势
- 定义新的市场区隔

Geographic reach

- 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

企业客户

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
bp
Watsons
Elizabeth Arden
ALCAN

高校客户

Brown
Columbia
Cornell
Dartmouth
Harvard
Penn
Princeton
Yale

SURF diensten
EDHEC BUSINESS SCHOOL Lille - Nice
POLYTECHNIC UNIVERSITY 香港理工大
CAMBRIDGE Judge Business School
eduserv chest
UNIVERSITY OF STIRLING
INSEAD
The University of Manchester Manchester Business School
LSE economics
CEIBS
DUKE THE FUQUA SCHOOL OF BUSINESS
NGEE ANN POLYTECHNIC
RSM Erasmus ERASMUS UNIVERSITY
Wharton UNIVERSITY of PENNSYLVANIA
INSTITUTO PANAMERICANO DE ALTA DIRECCION DE EMPRESA
CREPUQ CONFÉRENCE DES RECTEURS ET DES PRINCIPAUX DES UNIVERSITÉS DU QUÉBEC
DLSU De La Salle University
IMD
ESPM
Handelshøjskolen i Århus Aarhus School of Business
KOREA UNIVERSITY
WIRTSCHAFTS UNIVERSITÄT WIEN
HARVARD BUSINESS SCHOOL
TECNOLÓGICO DE MONTERREY
GOLDEN GATE UNIVERSITY
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
MIT
UNIVERSITY OF LEEDS
DIT
UNIVERSITI SAINS MALAYSIA
BCIT Openet
BRITISH COLUMBIA INSTITUTE OF TECHNOLOGY A POLYTECHNIC INSTITUTION
1906 SZKOŁA GŁÓWNA HANDLOWA W WARSZAWIE 2006
Od wieku na oceanie wiedzy
ECOLE HOTELIERE LAUSANNE Since 1893 First in the World
SMU SINGAPORE MANAGEMENT UNIVERSITY
NHH
ALMA MATER STUDIORUM UNIVERSITÀ DI BOLOGNA

What is Passport GMID?

Industries & Countries& Consumers

Industries

- 含酒精饮料
- 热饮
- 软饮料
- 新鲜食品和包装食品
- 服饰及鞋类
- 个人电子消费品
- 化妆品及盥洗用品
- 一次性纸制品
- 家用电器
- 眼镜
- 包装行业
- 家用清洁产品
- 家用器皿及家具织物
- 非处方药（OTC）
- 个人休闲产品
- 宠物食品及宠物护理品
- 烟草
- 玩具及游戏
- 营养保健食品饮料
- 零售业
- 旅游业
- 消费金融业
- 餐饮业

统计数据（历史+5年预测数据）

- 市场销售额
- 公司市场占有率
- 品牌占有率
- 价格数据
- 销售渠道

报告

- 行业报告（全球和国家）
- 品类报告
- 公司报告（跨国公司和当地公司）

评论

- 新产品推出
- 兼并重组
- 市场营销战略

- 评估产业市场的增长潜力
- 评价公司、品牌和渠道的经营情况（公司战略规划，市场策略研究)
- 评估所有分销商的销售实力
- 分析产业增长的驱动因素

行业研究范围


含酒精饮料


服装鞋帽


个人电子消费品


化妆品行业


一次性纸制品


DIY和园艺用品


家电行业


眼镜


个人金融服务


餐饮行业


新鲜食品


健康食品


家庭清洁护理品


家具与家居用品


独立销售渠道


原料行业


非处方药品


包装食品


包装行业


宠物


零售行业


软饮料


烟草行业


玩具与游戏


旅游业


热饮料

C&C-Countries & Consumers

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（1977-2014）

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

外贸情况（全球各个国家详尽的进出口额）

- 按目的地国家分
- 按商品类别分（100小类）

收入法、支出法计算的GDP

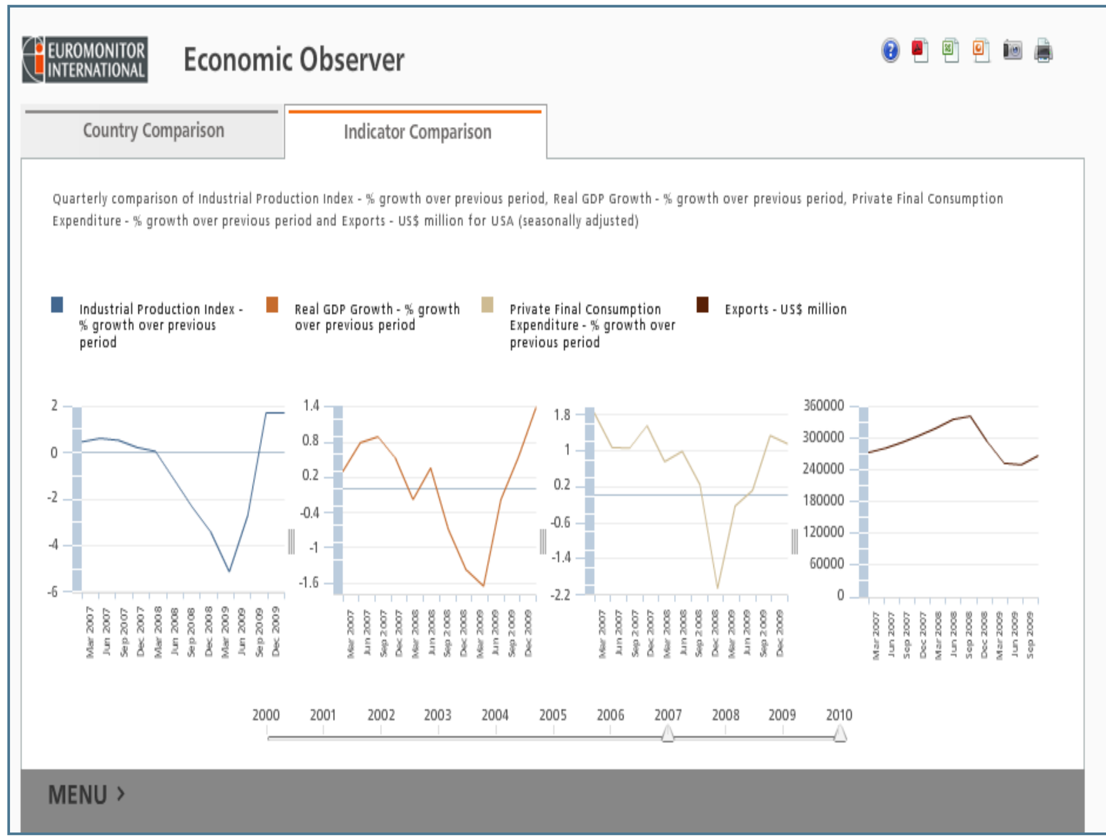
- GDP按来源分，国民经济各个行业的贡献额（40多个小类）农业，狩猎业，林业和渔业；采矿及采石业；食品制造业；饮料和烟草业；纺织品制造业；零售贸易；个人和家庭用品维修业；餐饮及酒店业；运输，仓库及通讯业；金融中介服务业

C&C-Economy Finance and Trade-- 续 (2000-current)

What is it?

- 季度和月度数据
- 52个国家,19 个经济指标
- 每星期更新

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



C&C-Economy Finance and Trade-- 续 (G7+10 emerging economies +China)

- 外贸进出口情况
- FDI
- 固定资产投资情况
- 零售业销售情况
- 工业生产
- 各城市通货膨胀率

C& C – Government ,labor and education (1977-2014)

- 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

政府

- 政府开支:政府在公共服务,国防,教育,医疗等方面的开支
- 金融：国际清偿能力，存款银行资产，存款行债务；年度贷款利率，银行的存款储备量；政府财政，预算：开支，税收，盈亏；对外：债务，外汇储备，黄金储备；市值；货币供应量

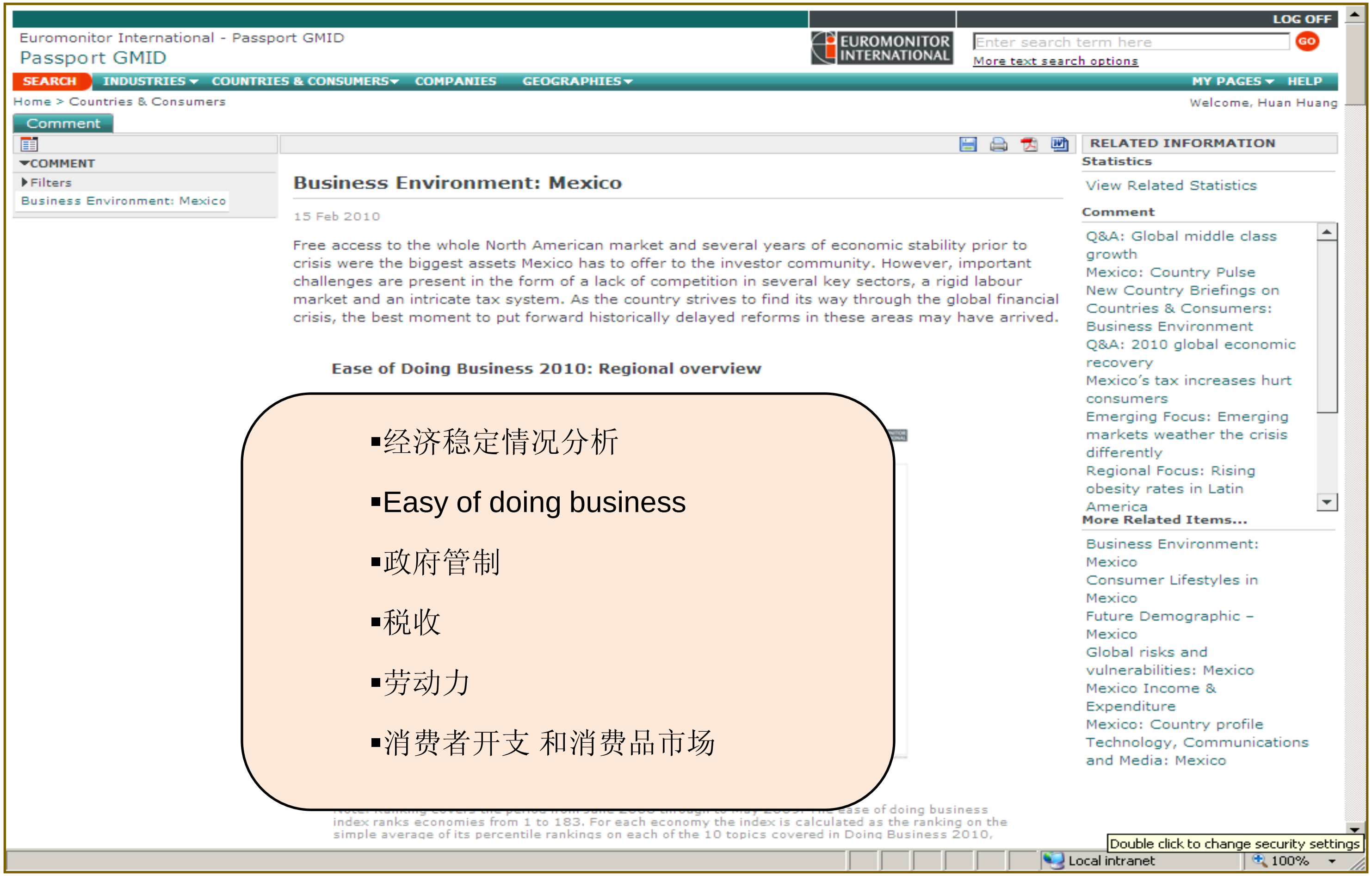
劳动力

- 各国的人工成本、工作时间、
- 国民经济中各部门的劳动力，各个年龄段的男女性劳动力（20-24 岁女性劳动力人口）
- 每个年龄段的男女就业人口/每个年龄段的男女失业人口
- 兼职人口、各个年龄段的男性和 女性失业率、按受教育程度划分的失业率。

教育

- 成人识字率、义务教育开始年龄，离校年龄，学前教育男女性入学率
- 大学老师数量；学习各个专业大学生数量
- 受初等、中等、高等教育的人口；二级专科学校学生，二级师范学院在校学生，教学人员；高等教育，大学和高等教育场所，
- 在购买力平价条件下各层次教育的支出。

C&C government labor education–续 report(Business Environment)



- 经济稳定情况分析
- Easy of doing business
- 政府管制
- 税收
- 劳动力
- 消费者开支 和消费品市场

C&C—Industry ,Infrastructure ,and Environment

Agriculture

Automotives

Industrial output

transportation

Energy resources and output

Environmental data

农林畜牧业、工业

- 各种农产品的产量及出口量（香蕉、鸡蛋、蜂蜜，奶酪，牛肉等30种）
- 林业（纸张 纸浆产量）；畜牧业（禽类养殖量）
- 工业：煤和各种金属矿石的产量

能源

- 各种能源的消耗、产量和储藏量（煤，石油，天然气，生物燃料等）；
- 利用各种不同能源的发电量（由化石燃料、废弃物、地热、水利、核能、太阳能等）

交通

- 经公路运输的货物，公路网，公路网密度；
- 商船运输，散货干货运输船，化学品运输船，
- 集装箱运货船，通用货船，液化天然气运输船，商船运输队，油轮，客运/滚装船

环境

- C02 排放及其他污染气体的排放，森林砍伐
- 遭到威胁的各物种数量
- 生态保护区
- 铝制品循环利用

C&C-Technology, communitcations and media

- Ci
- C
- M
- Te

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.

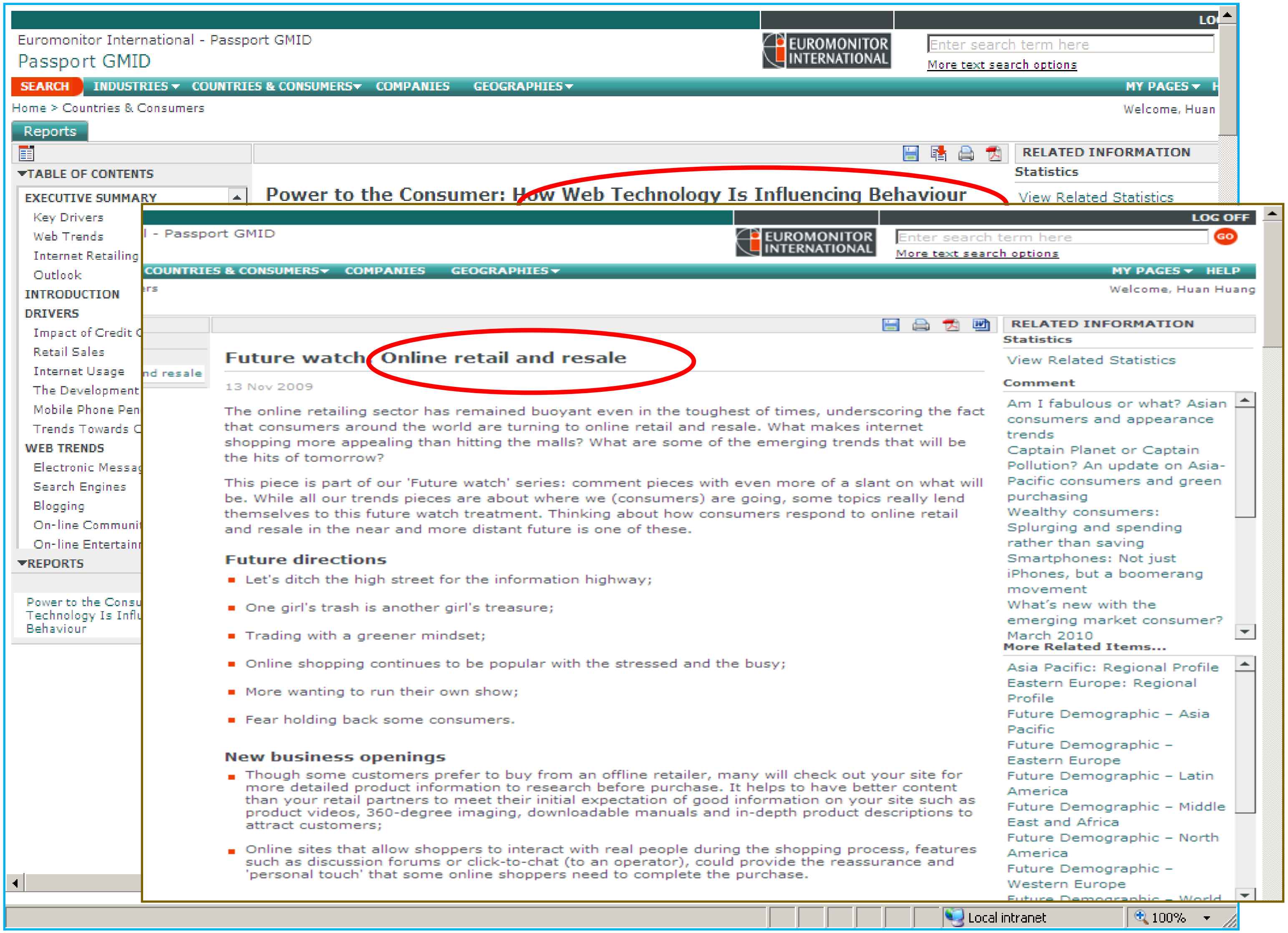
报告内容

机；
- 互联网使用者，互联网客户；
- 拨号上网、宽带上网和ISDN用户；互联网用户；
- 网上购物；

性，电信资金总额，电话，正在使用的电话线数量，国内电话，国际外拨电话，
- 移动电话：用户，呼叫；移动电信收入，移动短信发送量

通信技术的发展情况：
- 网络营销的发展现状及趋势；
- 通信技术对消费者行为的影响

C&C-technology ,communications ,and media –续（报告）



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

人口指标

- 生育女性平均年龄
- 婚外生育
- 各种犯罪的犯罪率
- 人口出生率，生育率，活产婴儿，死亡率，死亡(数量)，人口密度
- 外国公民，人均土地面积
- 平均初婚年龄：女性、男性；平均结婚年龄：男性，女性；离婚率，结婚率，离婚次数，结婚次数

人口数量

- 各个年龄点的男女人口数量(1977-2020)
- 按下述教育程度划分的人口
- 按婚姻状况划分人口：已婚，离异，丧偶，单身
- 按城乡位置划分人口：城市人口，农村人口，人口

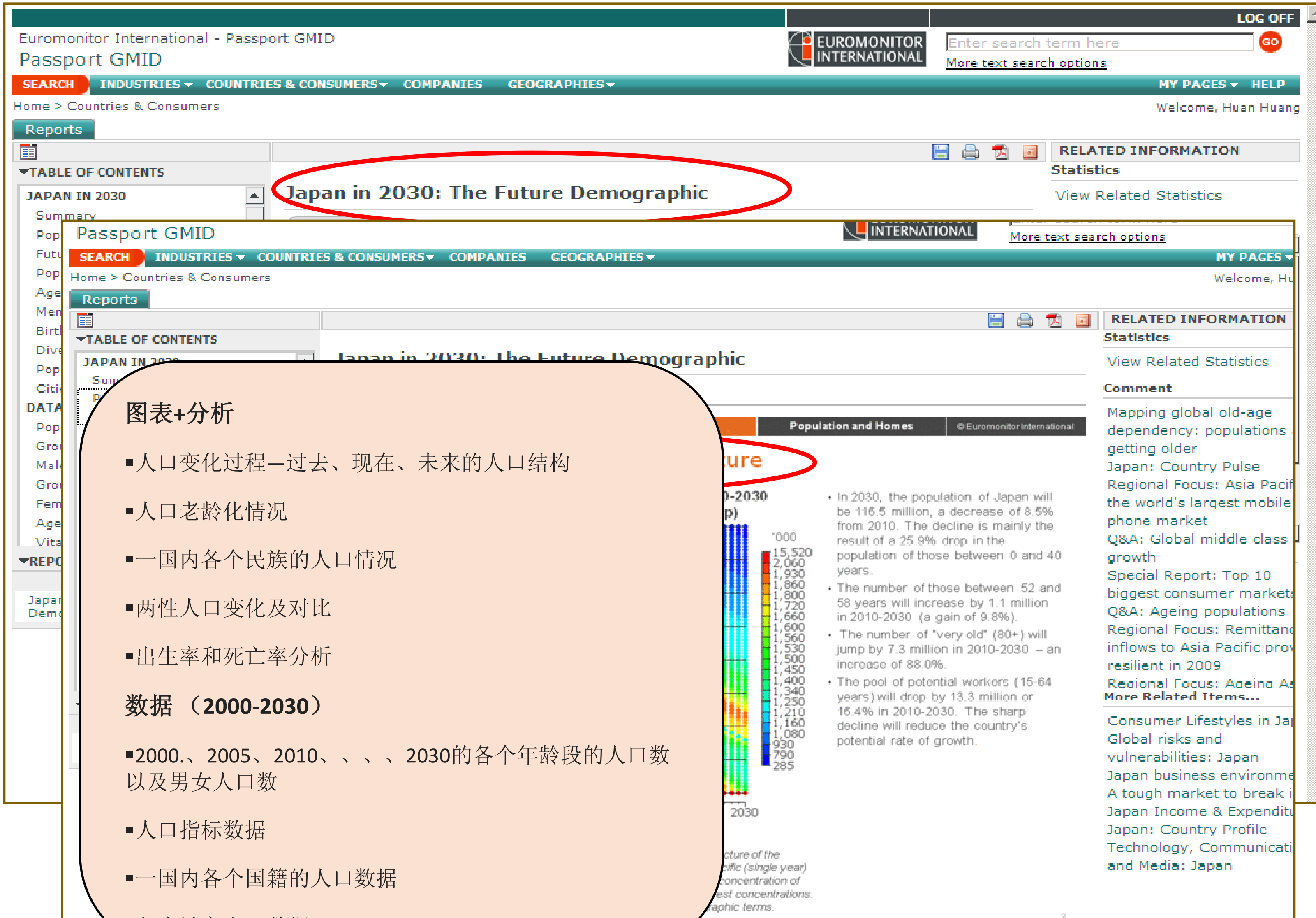
家庭构成

- 按居住人口划分的家庭住户按居住人口划分的家庭住户：1人、2人、、及以上
- 按房间数目划分的家庭住户，
- 按户主年龄划分的家庭住户
- 按户主受教育程度划分的家庭住户
- 按住户性别划分的家庭住户：按家庭类型划分的家庭住户，单身，无子女夫妇，有子女夫妇，单亲家庭，其他
- 按城市/农村地区、宠物数量、
- 狗、猫、住宅存量、
- 新竣工住宅划分的家庭住户

家居和住宅

- 按房屋使用期限划分家居类型:**住宅**业主，无抵押**住宅**业主，有抵押**住宅**业主，租房者，其它；按住所类型划分家居类型：房屋，独立式房屋，半独立式房屋和排房，公寓，其他
- 家庭住户对耐用消费品拥有量：空调器，电话答录机，自行车，黑白电视机，有线电视，照相机，CD播放机等

C&C—Population and homes --续（报告，未来人口）



图表+分析

- 人口变化过程—过去、现在、未来的人口结构
- 人口老龄化情况
- 一国内各个民族的人口情况
- 两性人口变化及对比
- 出生率和死亡率分析

数据 （2000-2030）

- 2000.、2005、2010、、、、2030的各个年龄段的人口数以及男女人口数
- 人口指标数据
- 一国内各个国籍的人口数据
- 各个城市人口数据

C& C –Income and expenditure (1997-2015)

- Annual gross income
- Annual disposable income
- Annual gross income by age
- Annual gross income by source
- Disposable income by education
- Average annual disposable income by sex
- Household disposable income distribution
- Savings
- Taxes and social contributes
- Consumer expenditure
- Consumer prices and costs

收入	消费价格及成本	支出模式
•各个年龄段人口的总收入、平均收入 •各个年龄段在各个收入段的人数（45-49人口在US$0-500,501-1000,1000-1500……等段的平均收入） •各个收入段在各个年龄段的人口数量 •各个教育层次人口的平均收入 •家庭收入：年收入在US$500+,1500+……..45000+等收入段的家庭数量及比例	•CPI：食品与非酒精饮料价格，酒精饮料和烟草的价格，服装和鞋类的价格，住房价格，保健品和医疗服务价格，交通运输价格，通讯价格，休闲和娱乐价格，教育价格，酒店和餐饮价格 等等 •成本：每公斤苹果， 每33厘升啤酒， 每250克黄油，每公斤面粉等	•消费开支模式：分类详尽（食品+非酒精饮料，烟酒，服装，住房，家庭用品，医疗健康，通信，休闲娱乐，教育，住宿餐饮） •以家庭结构划分消费开支，以收入水平划分消费开支

C&C—Consumer trends and lifestyle（报告）

Cimema and film

Consumer megatrends

Consumer segementation

Heatlh

Leisure time

Media access

Museumes

Press trends

消费行为大趋势，消费者细分

- 消费行为大趋势：年龄界限的模糊化； 茧居族； 消费者积极分子； 便利性； 环保意识； 身份； 个人主义和自我表现； 多重角色； 过度花费； 个性化选择； 超值优惠；小嗜好； 时间饥荒； 虚幻；Web2.0和移动通讯等等
- 消费者细分：按性别和性取向划分：女性，男性，同性恋；按年龄段划分，婴儿/幼儿，儿童，青少年，少年，学生， y代人，x代人，婴儿潮时出生的一代(40-60岁)；按收入/经济划分，富裕消费者，贫困消费者，城里人，农民，工人，雅皮士，移民；

消费者休息娱乐方式

- 影院和影片：电影院，每人每年前往电影院次数，票房收入，电影院上座率；参观各种博物馆的人数；新闻业趋势

健康

- 死亡原因：因疾病死亡（慢性肝病及肝硬化、循环系统，消化系统，因心脏、恶性肿瘤等）；交通事故死亡，伤害和中毒，自杀和自残
- 口腔卫生
- 卫生开支
- 婴儿死亡数量，婴儿死亡率
- 传染病
- 平均寿命与健康平均寿命
- 医疗服务（普通科医生会诊，牙医，医生，医院收治，医院和诊所等数量）
- 营养（蔬菜，蛋白质，脂肪等）
- 肥胖
- 吸烟
- 水和卫生设施

C&C—Consumer trends and lifestyle—续（报告，消费生活方式）

消费大趋势

人口

▪人口变化

▪按性别，婚姻状态，乡村/城市划分人口趋势

消费者细分

▪婴儿

▪儿童

▪青少年

▪学生

▪20-30岁

▪30-40 岁

▪中年人

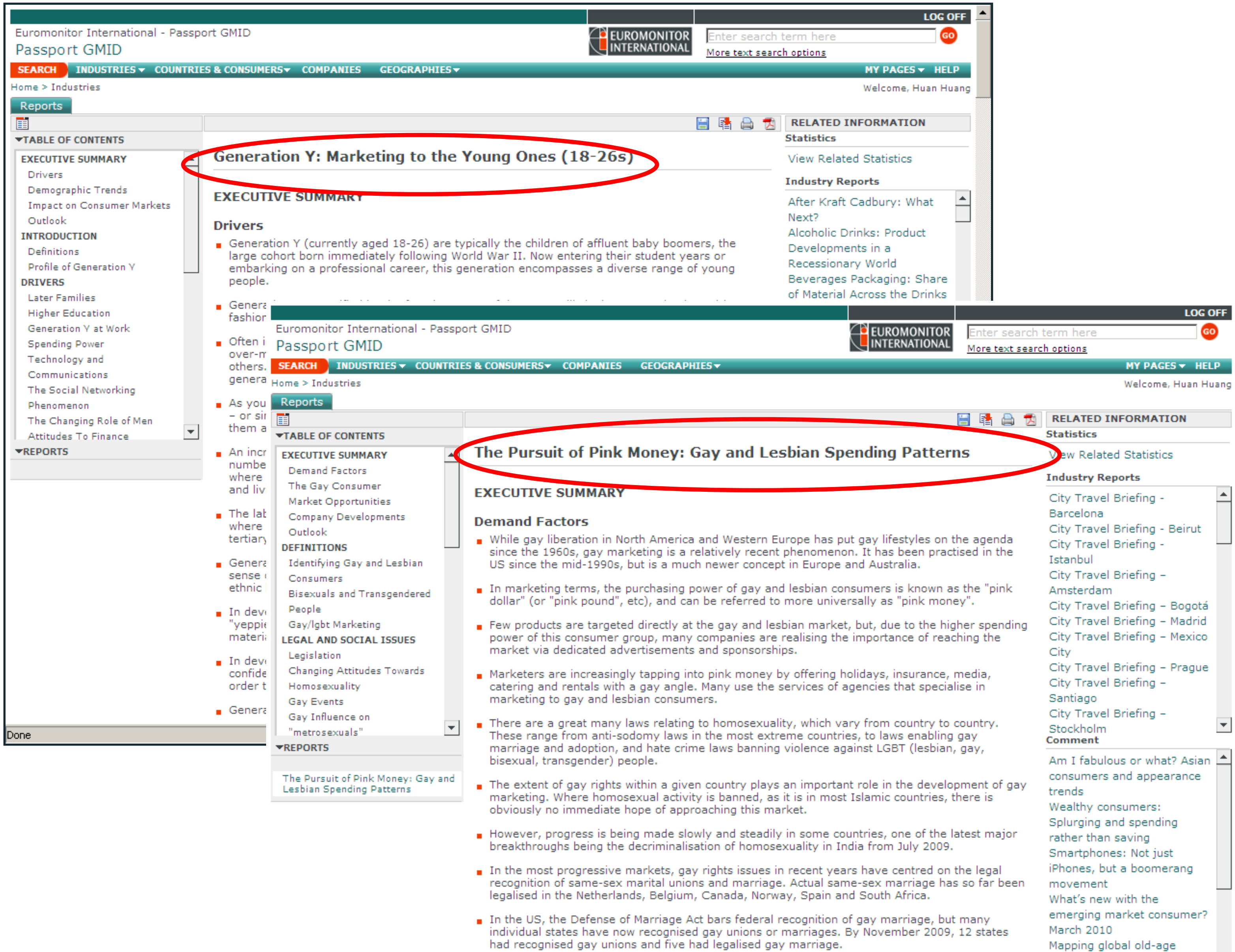
▪拿退休金的老人

家庭结构分析

收入情况分析

消费支出模式分析（食品和非酒精饮料、烟酒、服装、住房、家庭用品、医疗、交通、通信、休闲娱乐、教育、住宿、金融、个人护理、养老金）

C&C—Consumer trends and lifestyle—续（报告，消费细分和新兴消费趋势）



研究方法

行业调研方法

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

MARKET ANALYSIS

Data finalisation and report writing

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

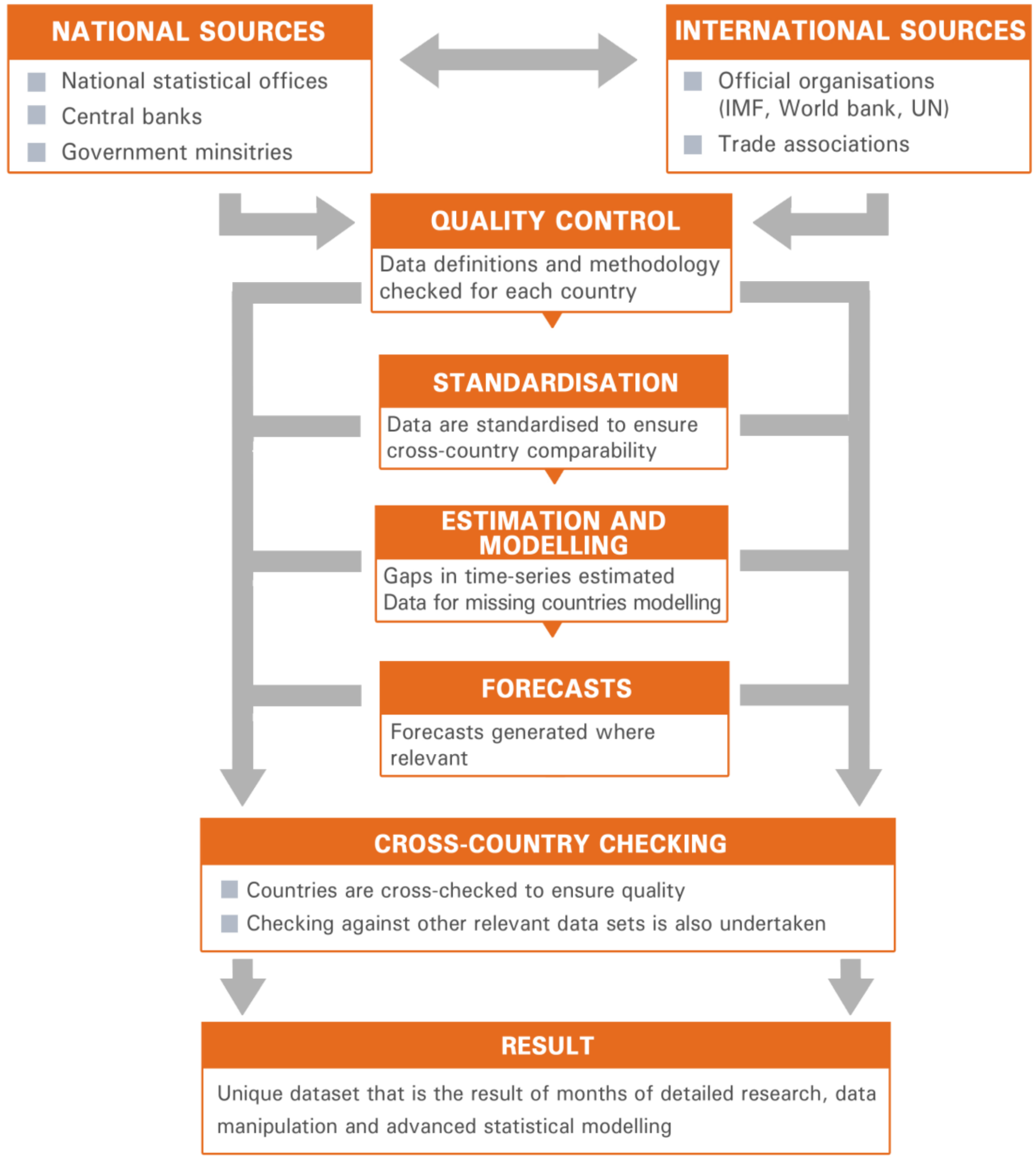
INTERNAL AUDIT

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

NATIONAL MARKET ANALYSIS
IN 80 COUNTRIES WORLDWIDE

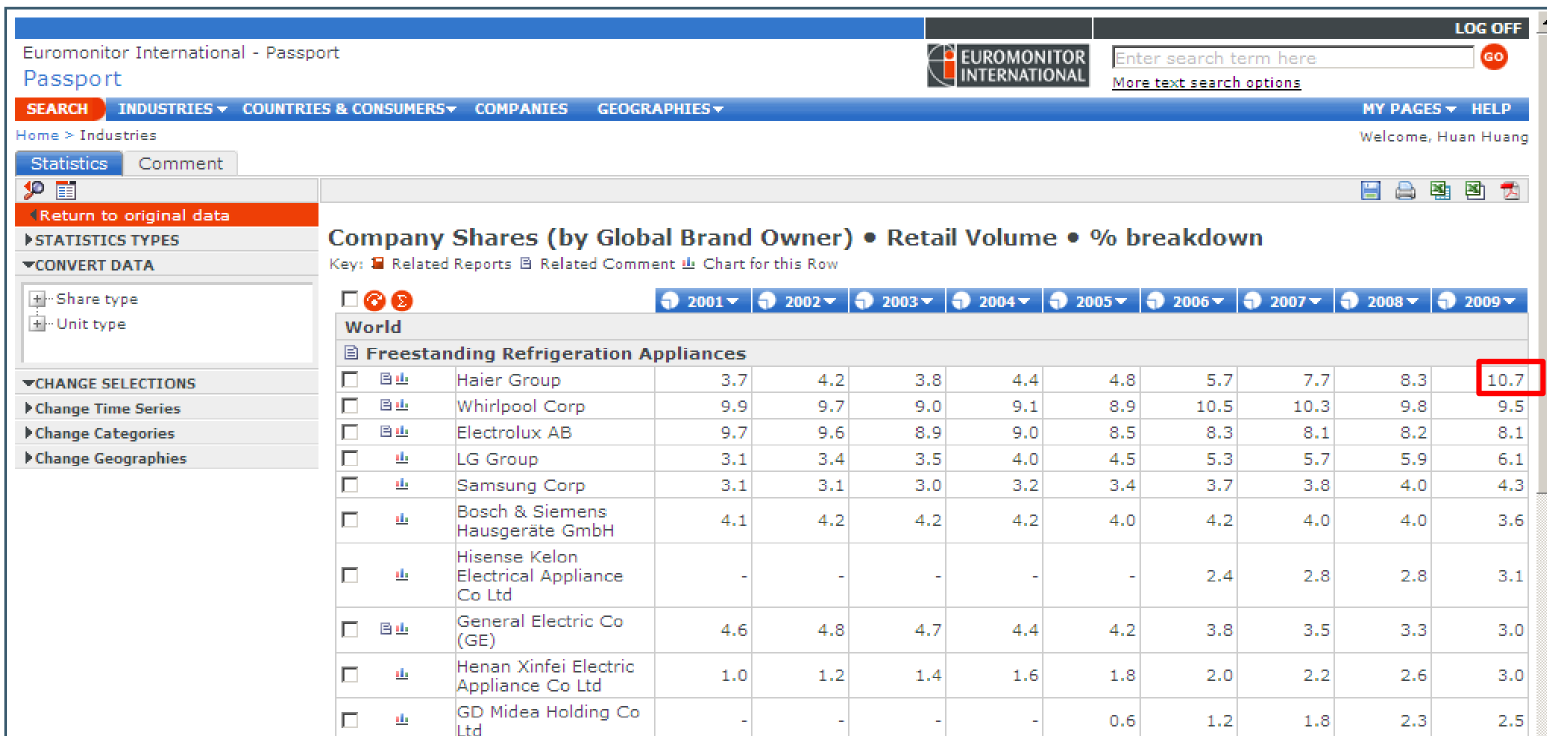
BOTTOM UP

国家和消费者—调研方法


NATIONAL SOURCES
National statistical offices
Central banks
Government minsitries
INTERNATIONAL SOURCES
Official organisations (IMF, World bank, UN)
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
CROSS-COUNTRY CHECKING
Countries are cross-checked to ensure quality
Checking against other relevant data sets is also undertaken
RESULT
Unique dataset that is the result of months of detailed research, data manipulation and advanced statistical modelling

Let us start with some fun facts…

- 2009年全球立式冰箱市场上哪个公司的市场占有率最大?



Euromonitor International - Passport

Passport

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Statistics Comment

Return to original data

STATISTICS TYPES

CONVERT DATA

Share type

Unit type

CHANGE SELECTIONS

Change Time Series

Change Categories

Change Geographies

Company Shares (by Global Brand Owner) • Retail Volume • % breakdown

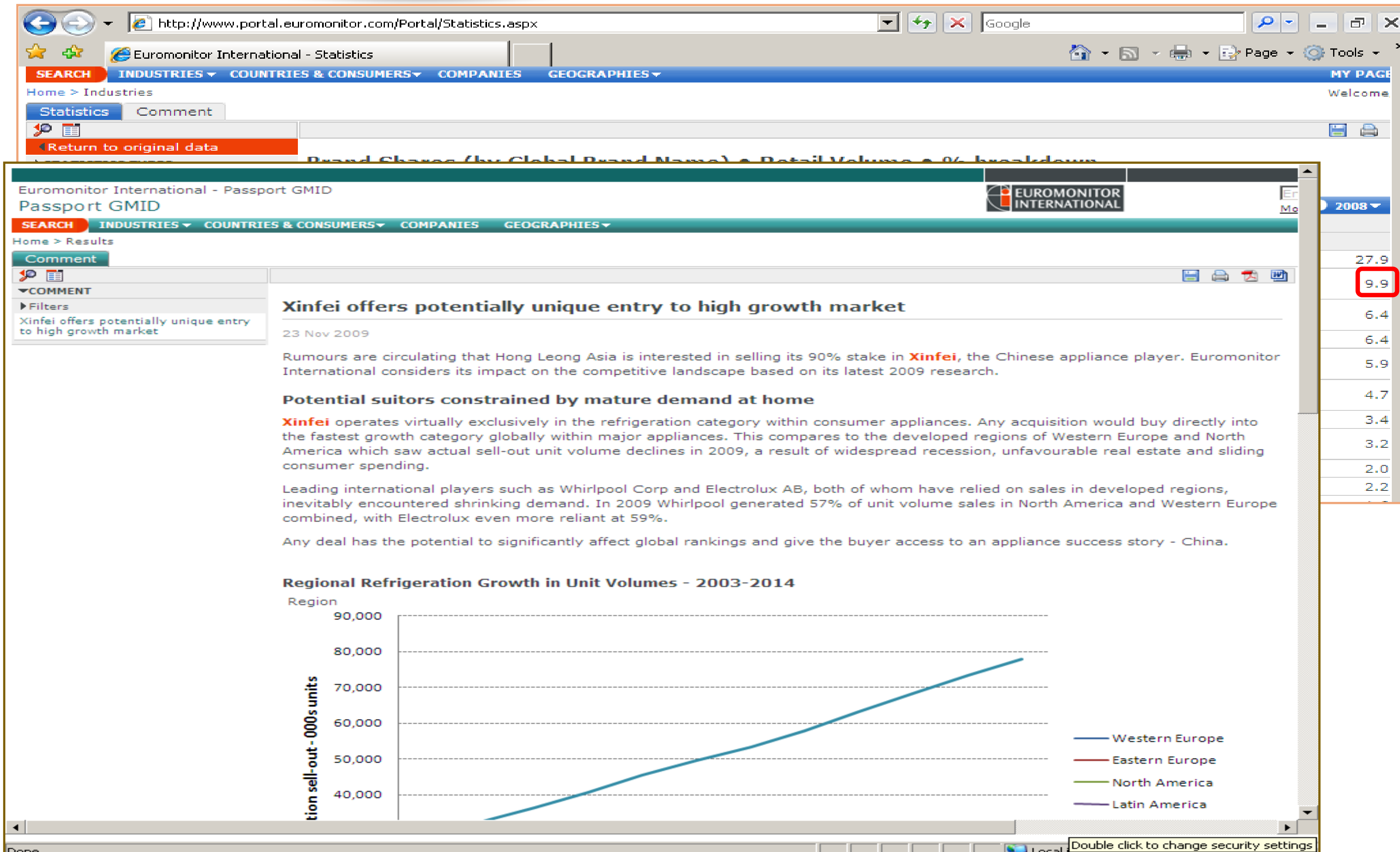
Key: Related Reports Related Comment Chart for this Row

World

Freestanding Refrigeration Appliances

	2001	2002	2003	2004	2005	2006	2007	2008	2009
Haier Group	3.7	4.2	3.8	4.4	4.8	5.7	7.7	8.3	10.7
Whirlpool Corp	9.9	9.7	9.0	9.1	8.9	10.5	10.3	9.8	9.5
Electrolux AB	9.7	9.6	8.9	9.0	8.5	8.3	8.1	8.2	8.1
LG Group	3.1	3.4	3.5	4.0	4.5	5.3	5.7	5.9	6.1
Samsung Corp	3.1	3.1	3.0	3.2	3.4	3.7	3.8	4.0	4.3
Bosch & Siemens Hausgeräte GmbH	4.1	4.2	4.2	4.2	4.0	4.2	4.0	4.0	3.6
Hisense Kelon Electrical Appliance Co Ltd	-	-	-	-	-	2.4	2.8	2.8	3.1
General Electric Co (GE)	4.6	4.8	4.7	4.4	4.2	3.8	3.5	3.3	3.0
Henan Xinfei Electric Appliance Co Ltd	1.0	1.2	1.4	1.6	1.8	2.0	2.2	2.6	3.0
GD Midea Holding Co Ltd	-	-	-	-	0.6	1.2	1.8	2.3	2.5

中国市场又是如何呢？


http://www.portal.euromonitor.com/Portal/Statistics.aspx

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Comment

COMMENT

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Xinfei offers potentially unique entry to high growth market

Xinfei offers potentially unique entry to high growth market

23 Nov 2009

Rumours are circulating that Hong Leong Asia is interested in selling its 90% stake in **Xinfei**, the Chinese appliance player. Euromonitor International considers its impact on the competitive landscape based on its latest 2009 research.

Potential suitors constrained by mature demand at home

Xinfei operates virtually exclusively in the refrigeration category within consumer appliances. Any acquisition would buy directly into the fastest growth category globally within major appliances. This compares to the developed regions of Western Europe and North America which saw actual sell-out unit volume declines in 2009, a result of widespread recession, unfavourable real estate and sliding consumer spending.

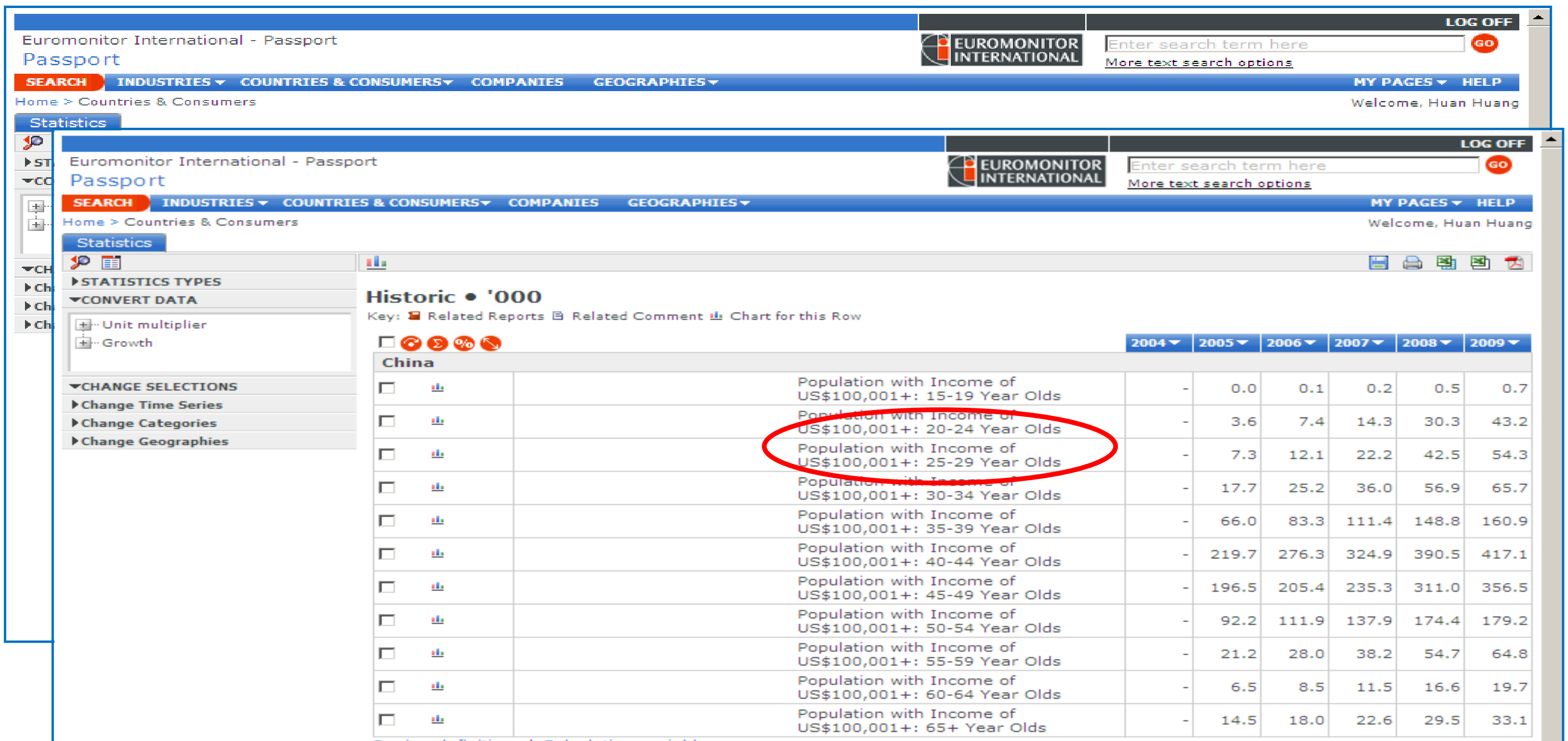
Leading international players such as Whirlpool Corp and Electrolux AB, both of whom have relied on sales in developed regions, inevitably encountered shrinking demand. In 2009 Whirlpool generated 57% of unit volume sales in North America and Western Europe combined, with Electrolux even more reliant at 59%.

Any deal has the potential to significantly affect global rankings and give the buyer access to an appliance success story - China.

Regional Refrigeration Growth in Unit Volumes - 2003-2014

Let us start with some fun facts…

- 中国2009年，在年收入高于10万美金的人口中，哪段年龄的人口数最多？



Historic • '000

Key: Related Reports Related Comment Chart for this Row

China	2004	2005	2006	2007	2008	2009
Population with Income of US$100,001+: 15-19 Year Olds	-	0.0	0.1	0.2	0.5	0.7
Population with Income of US$100,001+: 20-24 Year Olds	-	3.6	7.4	14.3	30.3	43.2
Population with Income of US$100,001+: 25-29 Year Olds	-	7.3	12.1	22.2	42.5	54.3
Population with Income of US$100,001+: 30-34 Year Olds	-	17.7	25.2	36.0	56.9	65.7
Population with Income of US$100,001+: 35-39 Year Olds	-	66.0	83.3	111.4	148.8	160.9
Population with Income of US$100,001+: 40-44 Year Olds	-	219.7	276.3	324.9	390.5	417.1
Population with Income of US$100,001+: 45-49 Year Olds	-	196.5	205.4	235.3	311.0	356.5
Population with Income of US$100,001+: 50-54 Year Olds	-	92.2	111.9	137.9	174.4	179.2
Population with Income of US$100,001+: 55-59 Year Olds	-	21.2	28.0	38.2	54.7	64.8
Population with Income of US$100,001+: 60-64 Year Olds	-	6.5	8.5	11.5	16.6	19.7
Population with Income of US$100,001+: 65+ Year Olds	-	14.5	18.0	22.6	29.5	33.1

Region definitions | Calculation variables

Let us start with some fun facts…

- 在亚洲所有国家当中，哪个国家的女孩首次结婚最早呢？

Historic

Key: Related Reports Related Comment Chart for this Row

Average Age of Women at First Marriage	2004	2005	2006	2007	2008	2009
Azerbaijan - years	23.3	23.4	23.3	23.3	23.8	24.0
China - years	23.3	23.3	23.5	23.5	23.6	23.7
Hong Kong, China - years	28.3	28.5	28.7	28.8	28.9	28.9
India - years	19.0	18.9	18.9	18.9	18.9	18.9
Indonesia - years	19.6	19.6	19.7	19.7	19.8	19.8
Japan - years	27.6	28.0	28.2	28.3	28.3	28.4
Kazakhstan - years	24.0	24.1	24.2	24.3	24.4	24.4
Malaysia - years	27.4	-	-	-	-	-
Pakistan - years	22.4	22.5	22.7	22.8	22.9	23.0
Philippines - years	23.6	23.6	23.6	23.5	23.5	23.5
Singapore - years	26.7	26.9	27.0	27.2	27.3	27.4
South Korea - years	27.3	27.5	27.7	27.9	28.0	28.2
Taiwan - years	26.8	26.8	26.9	26.9	26.9	27.0
Thailand - years	24.5	24.5	24.5	24.6	24.6	24.6
Turkmenistan - years	23.4	23.3	23.3	23.3	23.4	23.4
Uzbekistan - years	22.1	22.2	22.4	22.6	22.7	22.8
Vietnam - years	21.4	21.4	21.5	21.6	21.6	21.7

Let us start some applications

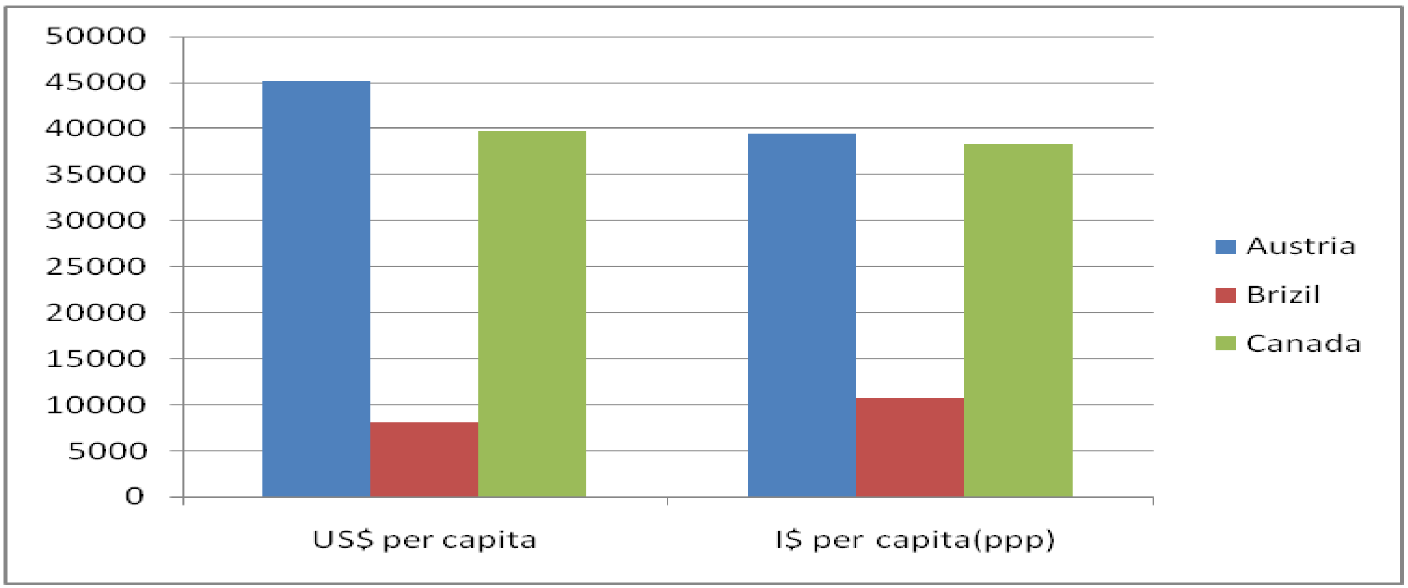
C&C-GDP In Australia, Brizil , Canada

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 $	654,660.6	696,075.6	742,279.2	798,323.9	837,653.4	859,055.6
Brazil						
Total GDP - R$ mn	1,941,498.0	2,147,238.0	2,369,797.0	2,661,344.0	3,004,881.0	3,153,510.7
GDP Measured at Purchasing Power Parity - mn international $	1,494,609.7	1,584,677.5	1,701,218.2	1,894,195.0	2,063,791.9	2,087,035.6
Canada						
Total GDP - C$ mn	1,290,180.0	1,368,730.0	1,439,290.0	1,531,430.0	1,602,470.0	1,524,052.6
GDP Measured at Purchasing Power Parity - mn international $	1,065,384.0	1,127,454.7	1,194,431.5	1,266,691.5	1,302,821.1	1,288,294.7

Category definitions | Calculation variables



举例：GDP相关数据来源（多个来源）

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

- 出口总额占GDP的79.3%
- 出口到德国，占全部出口的26.3%
- 向德国出口量每增加10%，GDP将随之增长2%。
- 2008年荷兰经济GDP增长2%，2009年出口德国的贸易总额量减少了15%，2009年荷兰GDP增长率为-4.0

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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

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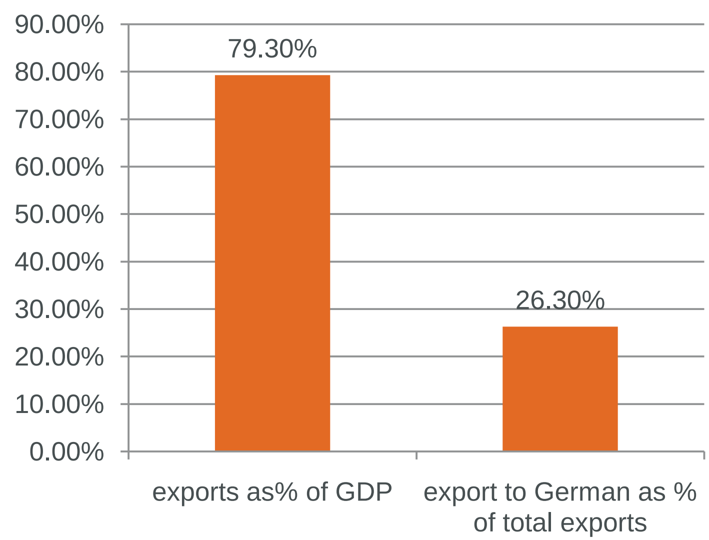
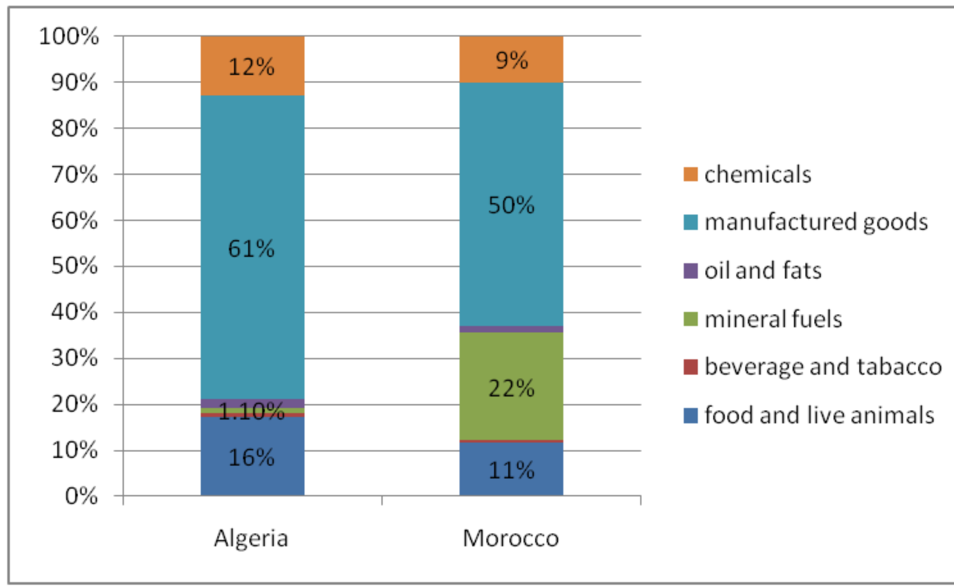


C&C –Imports of Algeria ,Morocco

❑两个国家都非常依赖于制造业产品进口，表明这两个国家的制造业都相对薄弱。

❑阿尔及利亚非常依赖食品进口，而摩洛哥非常依赖燃料进口，都是必需品，在经济危机中也很难减少进口。

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 Classification 6	3,071.6	3,407.6	4,742.3	6,030.2	9,242.1	8,227.7
Imports (cif) of Machinery and Transport Equipment, SITC Classification 7	7,348.1	8,541.3	7,887.6	10,412.2	14,471.8	12,697.5
Imports (cif) of Miscellaneous Manufactured Goods, SITC Classification 8	871.0	1,045.0	1,014.6	1,234.9	1,716.7	1,504.4



C&C –Government spending

❑各个国家不同的政府开支，表现出各个国家对不同方面的关注程度—公共设施、国防、医疗卫生、社会安全和福利，经济服务、房屋社区建设。

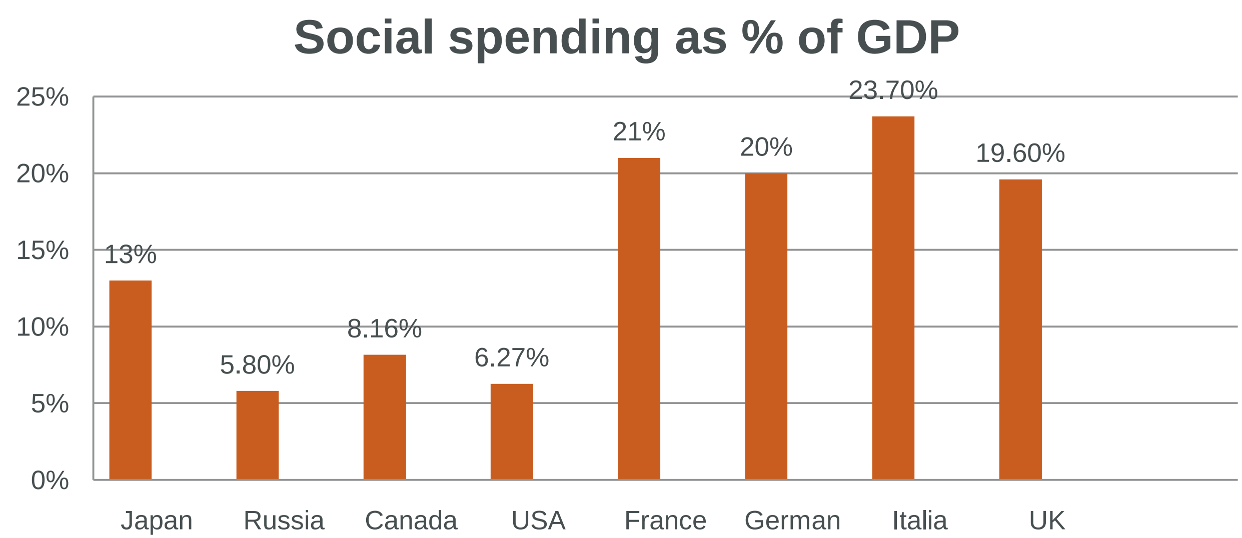
❑2009年， G20集团中，国防开支占政府开支最高的是沙特阿拉伯 占68%，其次是美国，20%。

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

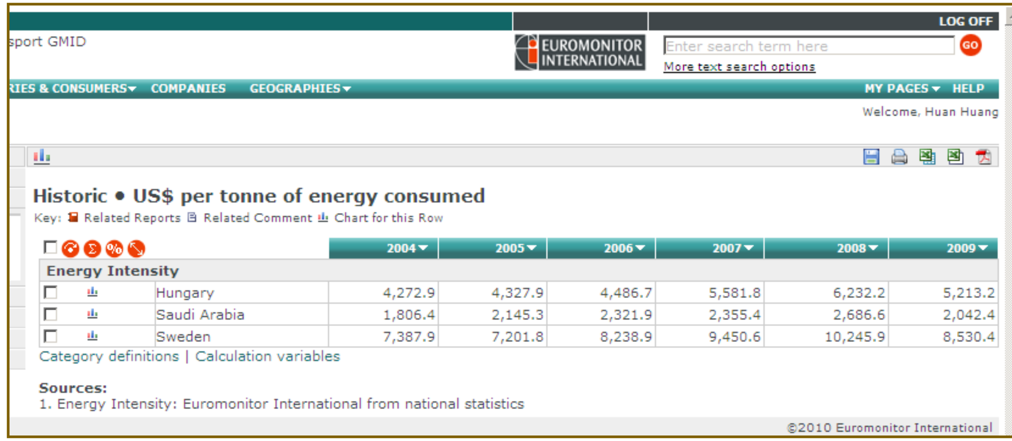
Category definitions | Calculation variables



C&C—Energy intensity

Energy Intensity

Indicates the value of gross domestic product produced per tonne of oil equivalent of energy consumed.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Historic • US$ per tonne of energy consumed

Key: Related Reports Related Comment Chart for this Row

Energy Intensity	2004	2005	2006	2007	2008	2009
Hungary	4,272.9	4,327.9	4,486.7	5,581.8	6,232.2	5,213.2
Saudi Arabia	1,806.4	2,145.3	2,321.9	2,355.4	2,686.6	2,042.4
Sweden	7,387.9	7,201.8	8,238.9	9,450.6	10,245.9	8,530.4

Category definitions | Calculation variables

Sources:
1. Energy Intensity: Euromonitor International from national statistics

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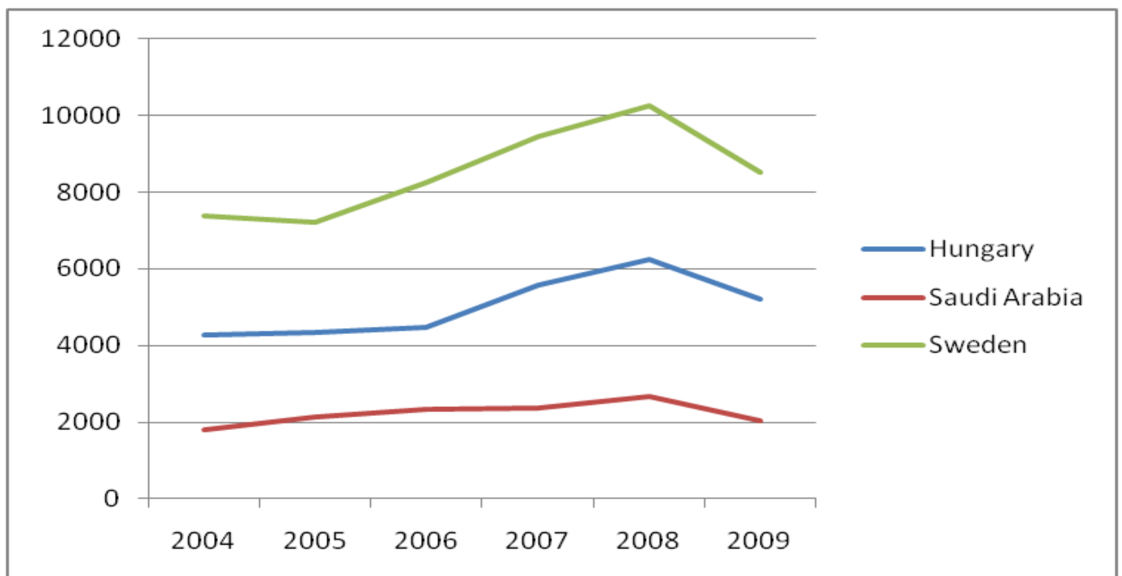


C&C-- Income distribution of households in singapore and Norway

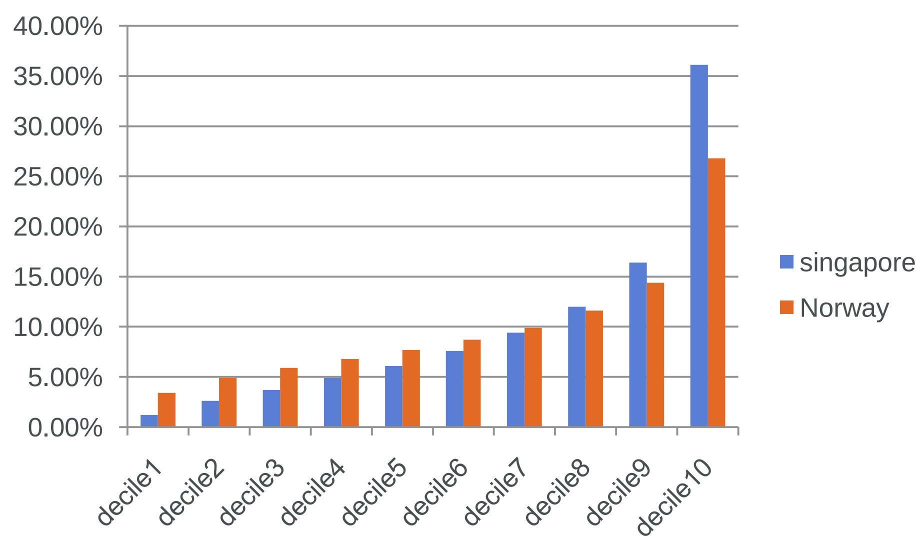
❑把全国的收入分为10 个等次，图表中的数据呈现的是：在各个等次总收入占全国家庭收入的百分比

❑新加坡和挪威的基尼指数分别是：47.9%，35.2%

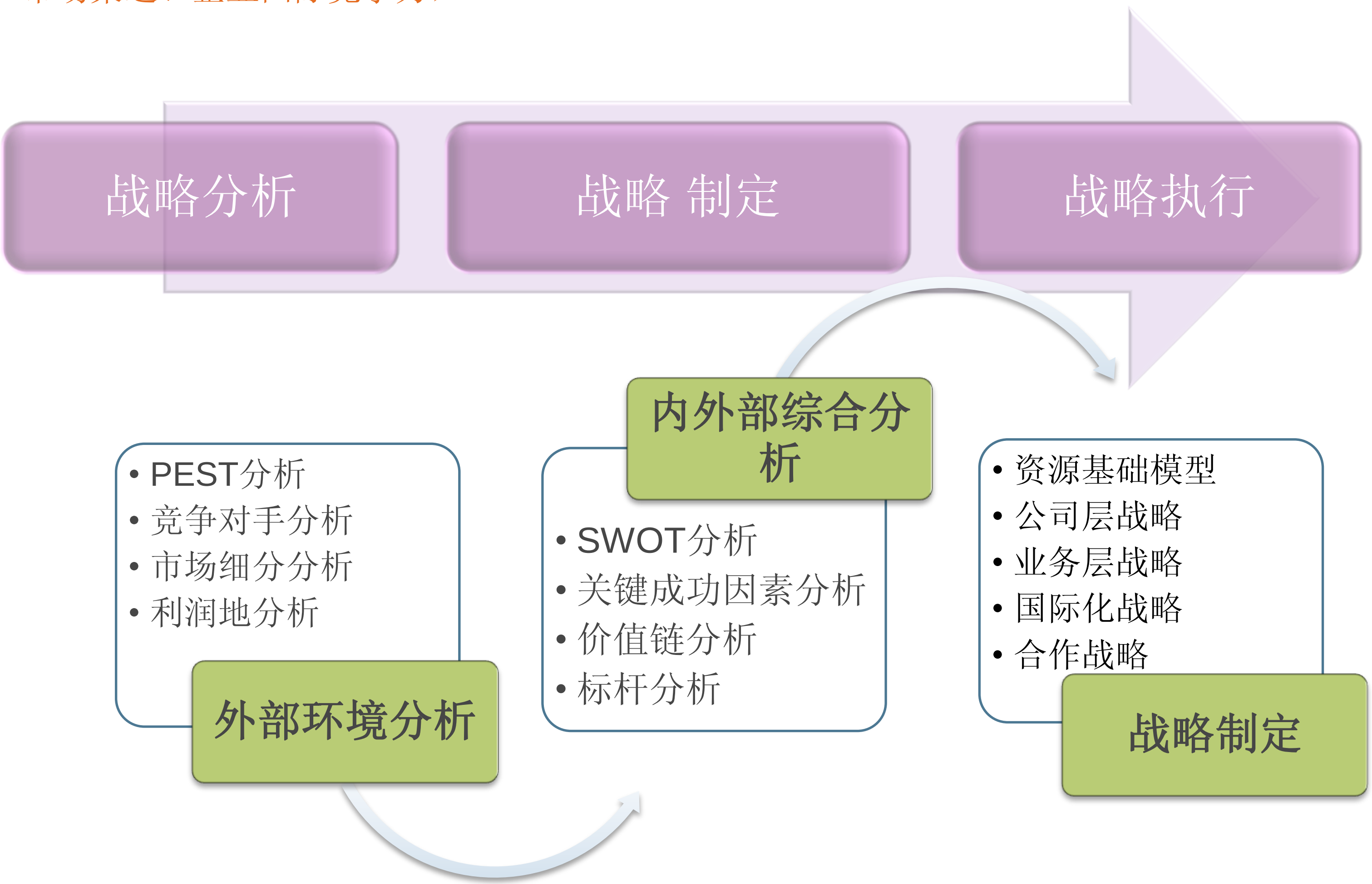
Historic • %

Key: Related Reports Related Comment Chart for this Row

Singapore	2004	2005	2006	2007	2008	2009
% of Household Annual Disposable Income by Decile: Decile 1	1.4	1.3	1.3	1.3	1.3	1.2
% of Household Annual Disposable Income by Decile: Decile 2	2.8	2.8	2.7	2.7	2.6	2.6
% of Household Annual Disposable Income by Decile: Decile 3	4.0	3.9	3.8	3.8	3.8	3.7
% of Household Annual Disposable Income by Decile: Decile 4	5.1	5.0	5.0	4.9	4.9	4.9
% of Household Annual Disposable Income by Decile: Decile 5	6.3	6.3	6.2	6.2	6.2	6.1
% of Household Annual Disposable Income by Decile: Decile 6	7.8	7.7	7.7	7.6	7.6	7.6
% of Household Annual Disposable Income by Decile: Decile 7	9.5	9.5	9.5	9.5	9.4	9.4
% of Household Annual Disposable Income by Decile: Decile 8	12.0	12.0	12.0	12.0	12.0	12.0
% of Household Annual Disposable Income by Decile: Decile 9	16.3	16.3	16.4	16.4	16.4	16.4
% of Household Annual Disposable Income by Decile: Decile 10	34.8	35.3	35.4	35.7	35.9	36.1
Gini Index	46.3	46.8	47.2	47.5	47.7	47.9

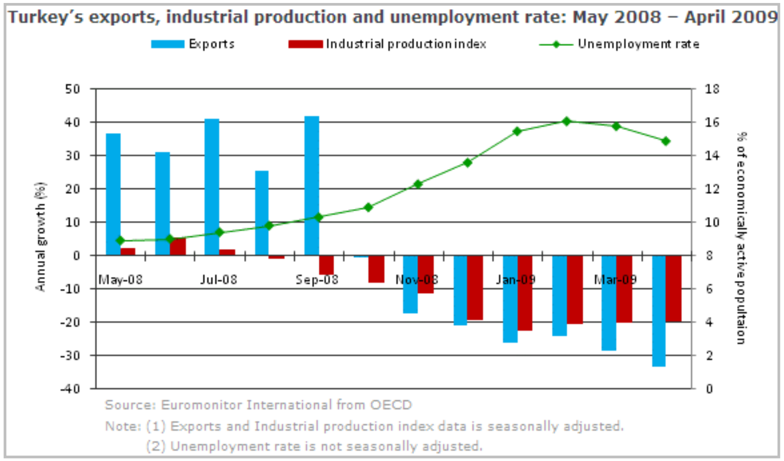


GMID SUPPORT 战略分析（战略管理、国际化战略、跨国公司管理、市场营销、消费者行为、市场渠道、企业国际竞争力）

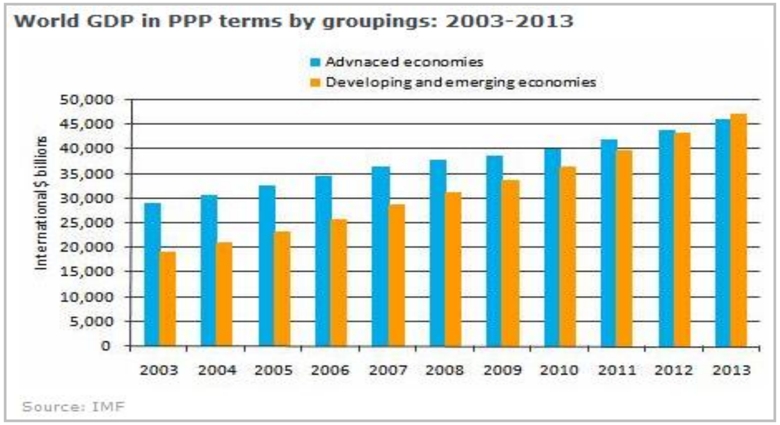


RETAIL—外部环境分析 -Economic conditions

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.

Retail—外部环境分析—Economic conditions

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

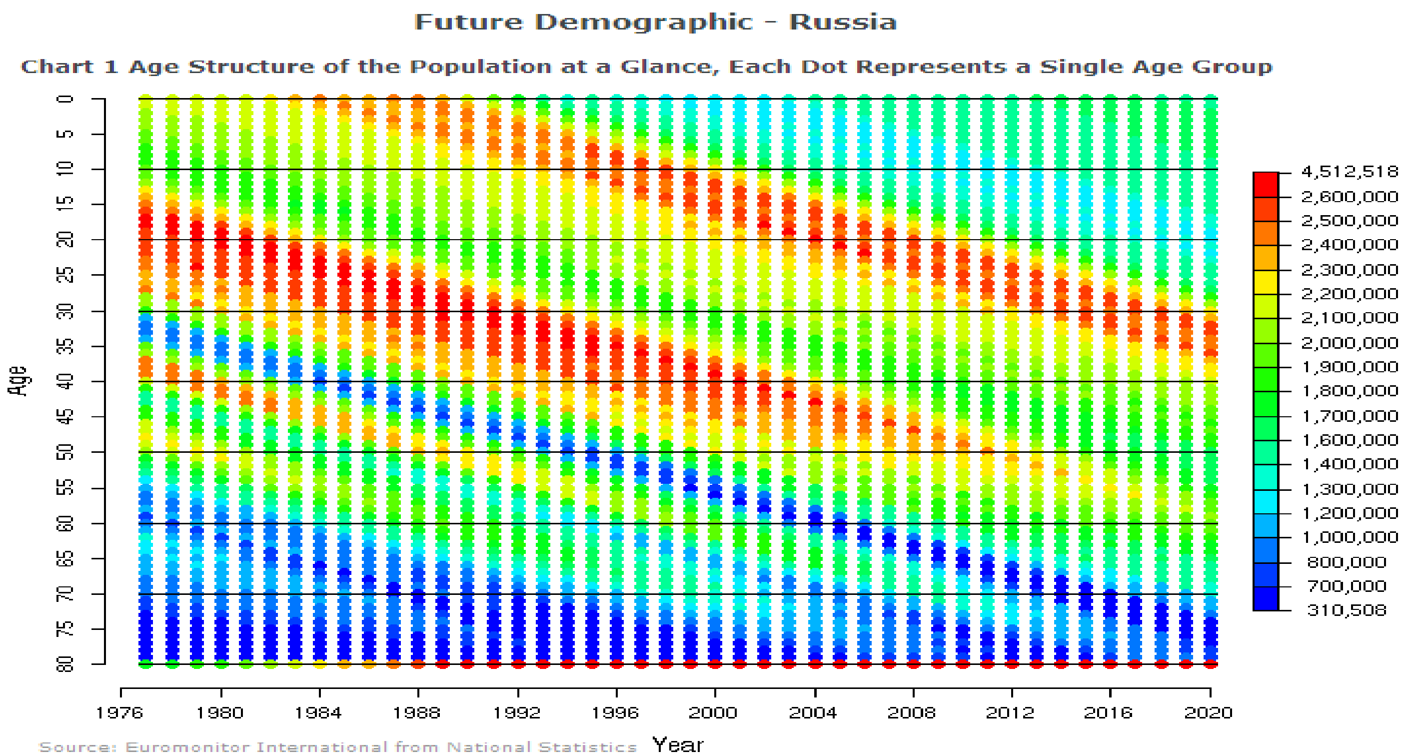
		2003-08 Absolute
Germany		
☑	GDP from real estate, renting and business activities	125,045.8
☑	GDP from manufacturing	111,095.8
☑	GDP from electricity, gas and water supply	38,866.1
☑	GDP from health and social work	28,567.4
☑	GDP from wholesale trade and commission trade, except of motor vehicles and 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

Category definitions

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.'

Retail—外部环境分析-Consumers



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).

Retail—竞争环境分析--companies

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

Note: Financial year end January. Latest year available to January 2009.

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. In Latin America, strong growth in Mexico remained driven by aggressive network expansion.
- Excluded from retailing sales are the activities of warehouse club operating the Sam's Club banner, with sales reaching US$46.9 billion in the year to January 2009, up by 6%. Sam's Club is present in six markets (Brazil, Canada, China, Mexico, Puerto Rico and the US).

World's largest revenues, profits and cash flow

- Wal-Mart's revenues far exceed its direct competitors', at US$401 billion over the financial year ending January 2009, up by 7%. Net profits are also much higher than direct rivals, at US$13.4 billion over the same period, up by 5%. The world's second largest retailer Carrefour had a global turnover of almost EUR98 billion in 2008 (US$144 billion) in 2008, up by 6%.
- Wal-Mart's free cash flow amounted to a record US$11.6 billion, almost twice as much as over the previous year, indicating that it will be in a strong position to acquire other retailers during 2009. Carrefour's operating free cash flow is estimated to reach only EUR1.5 billion (US$2.2 billion) in 2008.

2

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 will face competitors' stores of the same format: Pão de Açúcar's Assaí (operated by Cia Brasileira de Distribuição SA) and Carrefour's Atacadão (Carrefour Comércio e Indústria Ltda). Wal-Mart's experience with Sam's Club may constitute a competitive edge in this segment.
- Currently, Todo Dia is responsible for a small share of Wal-Mart's business in Brazil. However, this is expected to change over the forecast period as the company has announced plans to make Todo Dia a major element in its growth strategy.
- Wal-Mart is expected to begin online sales, given the growth of internet retailing in Brazil. This will be in response to competitors' 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 11 2103 5800
Fax:	+55 11 2103 5776
www:	www.walmartbrasil.com.br
Retail formats/channels:	Hypermarkets, supermarkets, disco
Retail brands:	Wal-Mart, Wal-Mart Supercenter, To Mercadorama, Drogaria Wal-Mart, D

Source: Euromonitor International from company reports, trad

Summary 2 Wal-Mart Brasil Ltda: Operational Indica

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

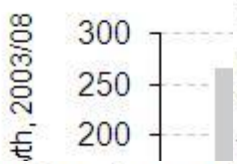
Category definitions | Region definitions | Calculation variables

Sources:

1. Retailing: Euromonitor from trade sources/national statistics

Retailers Increasingly Important Foodservice Players

Conve… …is …nd …lly,



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.

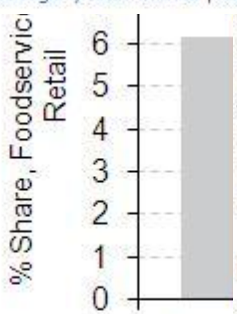
This represents the next step in the evolution of supermarket foodservice—rather than simply offering a selection of hot items,

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



…supermarket chains have steadily upgraded their outlets, stocking more premium items, more natural and organic products, and refitting existing outlets with improved furnishings and whole sections devoted to specialty products such as wine and cheese. This trend has steadily eroded Whole Foods' competitive advantage, while leaving the chain open to the perception that its products are overpriced relative to the competition. The new, expanded focus on foodservice and other amenities represents Whole Foods' effort to reclaim the high ground, offering an experience fundamentally different to that found at any other local grocer. It also represents an effort to boost sagging profits, with foodservice offering among the highest margins of any item in a given store.

No Shortage of Competition

Of course, Whole Foods is far from the only supermarket chain to embrace the foodservice challenge, with even smaller, more

…rs …r …o

foodservice to many markets is expanding rapidly and is expected to continue to do so going forward.

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						
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

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	36.8
Store Card Transactions	277.9	314.6	201.3	75.8	94.2	88.5

Region definitions | Calculation variables

Sources:
1. Consumer Finance: Euromonitor from trade sources/national statistics

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

Key: Related Reports Related Comment Chart for this Row

	2004	2005	2006	2007	2008	2009
Retailing						
Uzbekistan						
Dori-Darmon DAK	1.1	1.1	1.0	1.1	1.5	2.2
Chorsu Savdo Markazi OAJ XK	1.9	1.8	1.6	1.4	1.3	1.4
Oriflame Cosmetics SA	0.5	0.6	0.7	1.0	1.0	1.0
Sharq-Mir MChJ XK	0.7	0.7	0.7	0.7	0.6	0.7
Anglesey Food ShK	0.2	0.2	0.2	0.2	0.2	0.5
Asklepiy MChJ XK	0.2	0.2	0.2	0.2	0.3	0.4
Toshkent Univermagi TPO OAJ	0.4	0.4	0.4	0.3	0.3	0.3
Saf Savdo MChJ	0.2	0.3	0.2	0.3	0.2	0.3
Metro Superstore Sarl	0.2	0.2	0.2	0.2	0.2	0.2
Megapolis Asia MChJ	0.1	0.1	0.1	0.1	0.1	0.2
Mashenko DV ChP	0.1	0.1	0.1	0.1	0.1	0.1
Vitek International	0.2	0.2	0.2	0.2	0.2	0.1
Grand Farm Medical MChJ	0.0	0.0	0.0	0.0	0.1	0.1
Integral Asia MChJ	0.1	0.1	0.1	0.1	0.1	0.1
HVS MChJ	0.1	0.1	0.1	0.1	0.1	0.1
Indesit Co SpA	0.2	0.1	0.1	0.1	0.1	0.1
Kasymov NN ChP	0.1	0.1	0.1	0.1	0.1	0.0
Boltaboev ChP	0.1	0.1	0.1	0.1	0.1	0.0
Eshbaev ChP	0.1	0.1	0.1	0.1	0.1	0.0
Others	93.1	93.3	93.7	93.6	93.2	92.1
Total	100.0	100.0	100.0	100.0	100.0	100.0
Serbia						
Delta Holding doo	3.2	5.1	6.5	8.0	8.5	9.3
Univerexport doo	1.3	1.6	1.7	2.0	2.2	2.6
Mercator dd	0.7	0.6	0.6	1.0	1.7	1.8
Interex doo	0.3	0.6	0.7	1.4	1.1	1.1
Veropoulos Bros SA	0.2	0.4	0.4	1.0	1.0	1.1
Apotekarska Ustanova	0.6	0.6	0.6	0.7	0.7	0.9
Futura Plus doo	-	-	0.1	0.9	0.8	0.9
Agrokor dd	0.1	0.1	0.2	0.6	0.7	0.8
Simpo ad	0.3	0.4	0.5	0.6	0.6	0.7
Ziper doo	0.3	0.3	0.4	0.4	0.5	0.5

International sales Domestic sales

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.

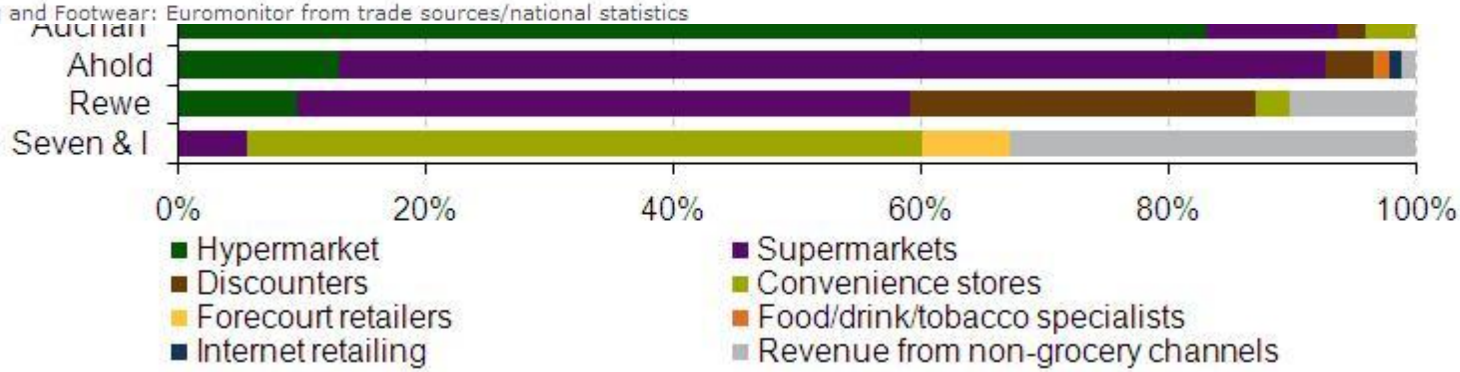
Distribution • Retail Value RSP • % breakdown

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



merchandisers and Drugstores/parapharmacies, amongst others.

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	2.2
Debit Function	1.7	1.8	1.9	2.0	2.1	2.1
Credit Function	1.6	1.7	1.9	2.0	2.0	2.1
Charge Card Function	0.1	0.1	0.1	0.1	0.1	0.1
Pre-Paid Function	1.7	2.0	2.1	2.4	2.6	2.9
Store Cards	0.0	0.0	0.0	0.0	0.0	0.0
India						
ATM Function	0.0	0.0	0.0	0.1	0.1	0.1
Debit Function	0.0	0.0	0.1	0.1	0.1	0.1
Credit Function	0.0	0.0	0.0	0.0	0.0	0.0
Charge Card Function	0.0	0.0	0.0	0.0	0.0	0.0
Pre-Paid Function	0.0	0.0	0.0	0.0	0.0	0.0
Store Cards	0.0	0.0	0.0	0.0	0.0	0.0
Brazil						
ATM Function	1.3	1.5	1.7	1.9	2.1	2.3
Debit Function	0.7	0.9	1.0	1.0	1.1	1.2
Credit Function	0.4	0.5	0.6	0.7	0.8	1.0
Charge Card Function	0.0	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

Why Passport GMID? (研究型和应用型为一体的事实类数据库)

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- 享誉世界的世界战略情报独立供应商，38年的研究经验
- 真正的全球数据库，产品定义和数据定义国际标准化，数据库可进行国际间对比

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- 每年18000份深度研究报告
- 每年7500份每日跟新的评论

❑宏观、微观、中观， 三个角度带您深入了解行业发展态势及趋势

- 宏观信息：经济指标、外贸、基础设施、能源环境；人口和家庭、收入和支出；消费者生活方式
- 中观信息：行业市场报告，产品简报
- 微观信息：地方公司报告，全球公司报告

Why passport GMID? –续

❑研究型和应用型为一体的事实类数据库

- 学术研究应用：国家信息，历史和预测数据，以及月度和季度数据相结合，便于研究经济、人口的老师和研究人员开展各国经济的研究，监控各国经济未来走向。

- 案例教学应用：时新的商业情报，是真实商业环境的客观反映，便于教师做开展案例教学，通过 Passport GMID，学生有同等机会获取世界顶级投行、咨询公司、制造企业、零售企业和政府机构等正在使用的高价值的研究信息。
  - 公司战略规划，市场进入项目研究，合并与收购计划
  - 竞争公司信息，标杆企业分析，机会分析
  - 市场策略制定，新业务发展，消费者洞察

❑研究三大领域，市场上唯一一个对消费者行为进行分析和研究的数据库

Q&A ?

Thank you

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