

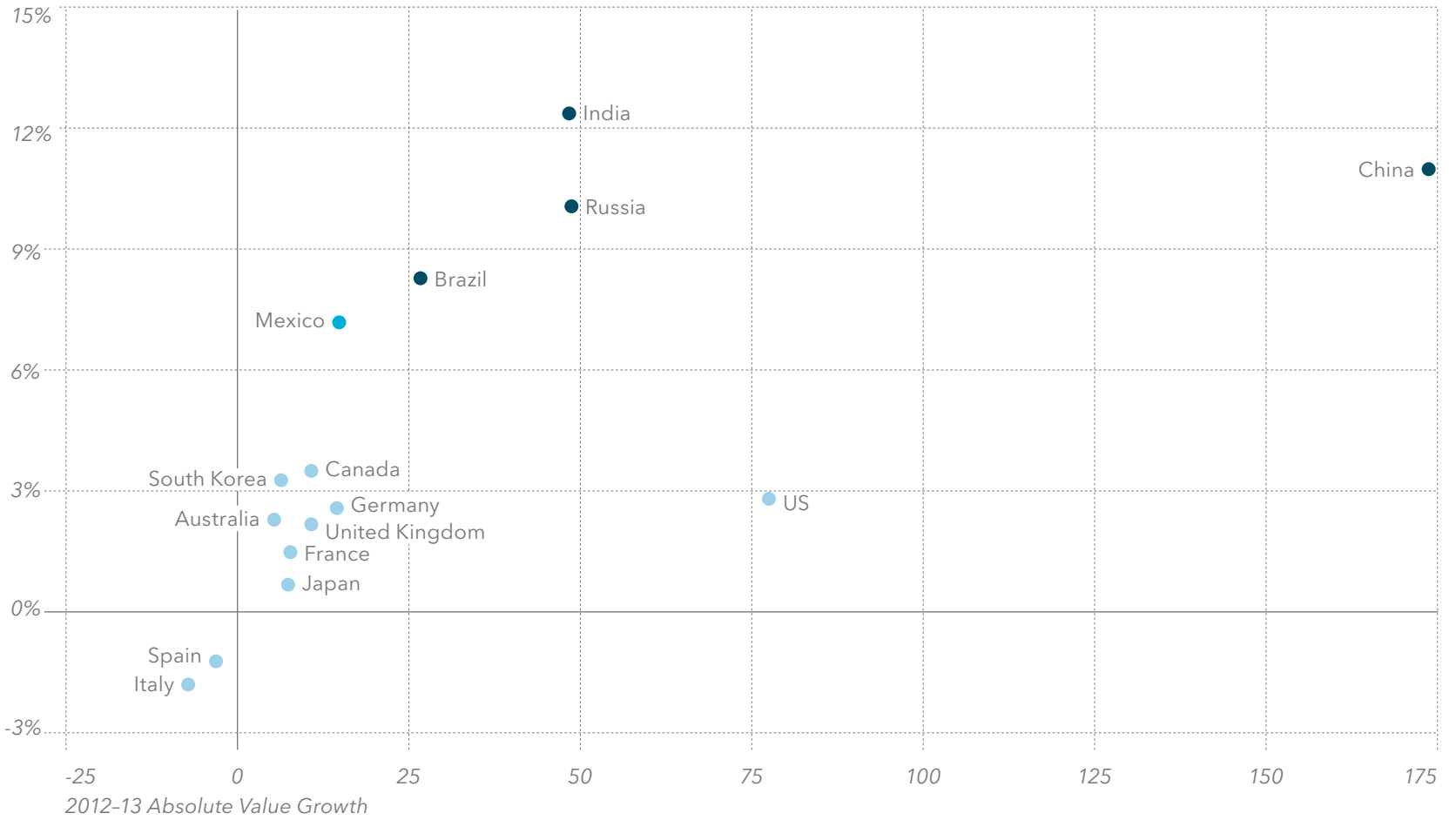
Retailing Overview: Key Highlights for 2013

15 Biggest Retail Markets

China Growth Dwarfs Other Retail Markets
retail value, US\$ billion

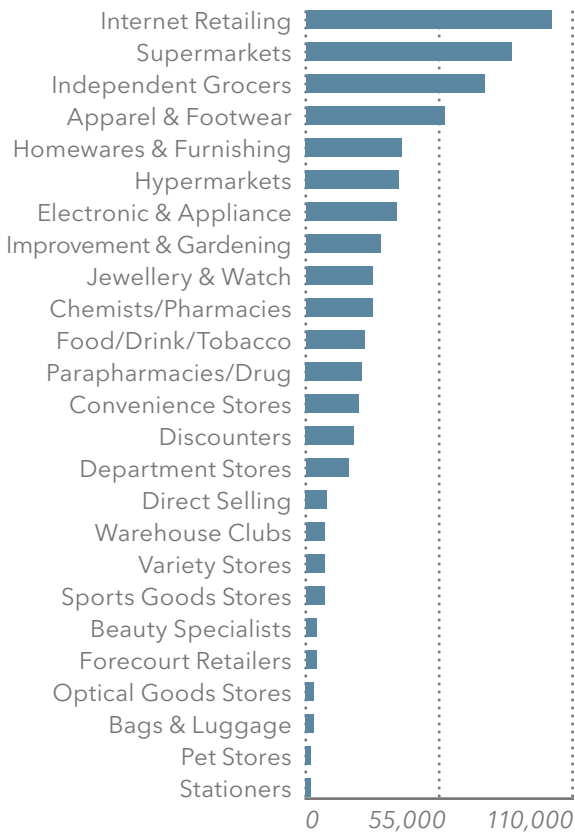
2012-13 % Growth

● Emerging ● BRIC ● Developed



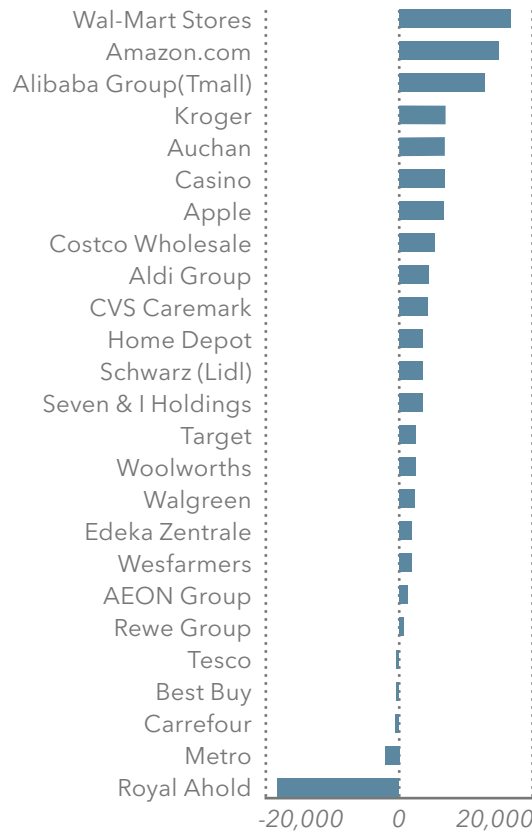
Channel Dynamics in 2013

Channel Growth, 2012-2013
absolute growth, US\$m, excl VAT



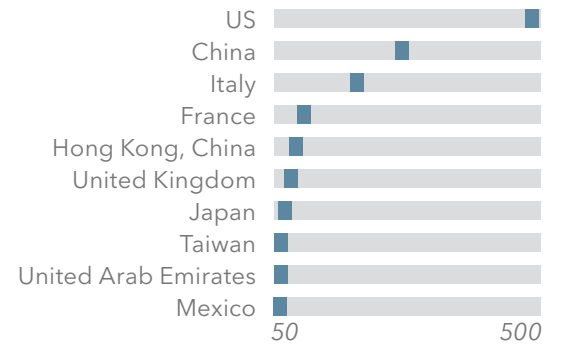
Top 25 Retailer Growth

Absolute Growth, 2012-2013
US\$m, excl VAT



Luxury Retail Hotspots

Number of Apparel Luxury Stores
2013, excl concessions



MOBILE INTERNET RETAILING

12.3%
share of internet sales through
tablets and smartphone globally
in 2013

APPAREL INTERNET SALES

\$123
the largest product category
sold online in 2013