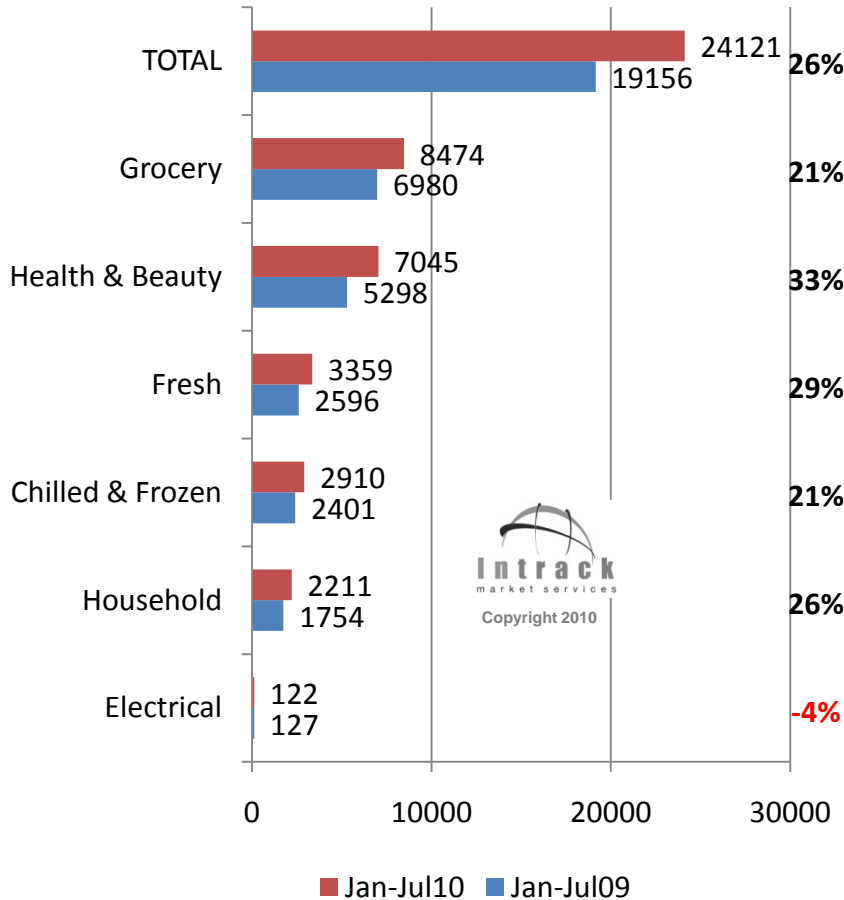




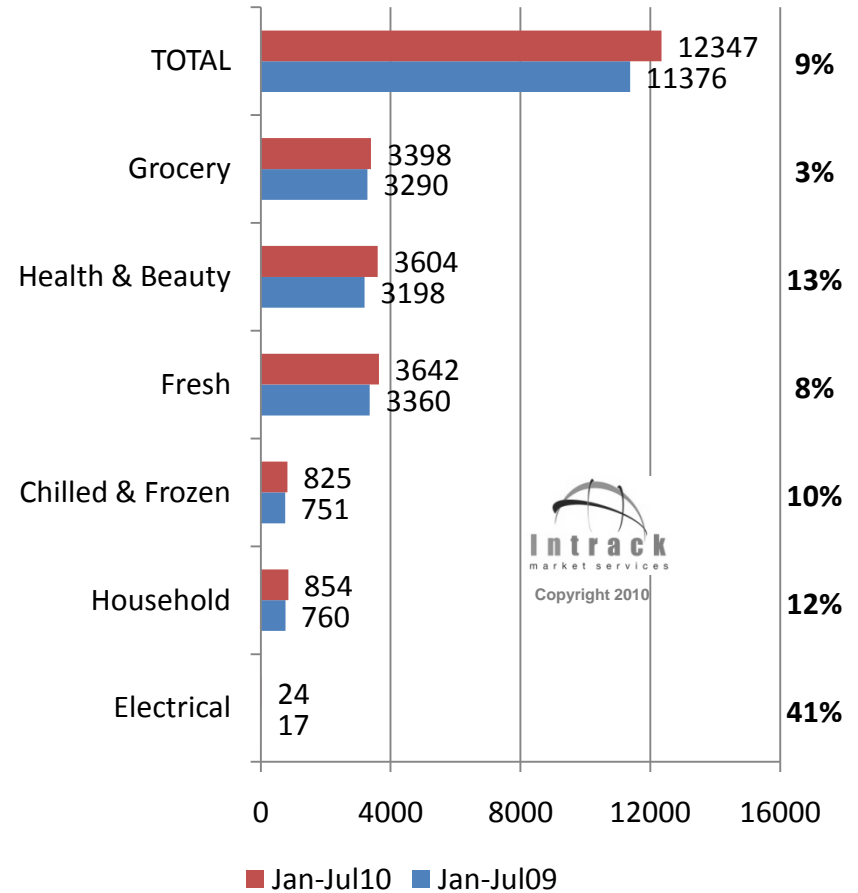
MailerTrack Advertised Promotions Update Jan-July 2010 vs. 2009

Total mailer & newspaper features grew by 26% & 9% respectively compared to the same period last year

Mailer Features by Department Jan-Jul 10 vs. 09



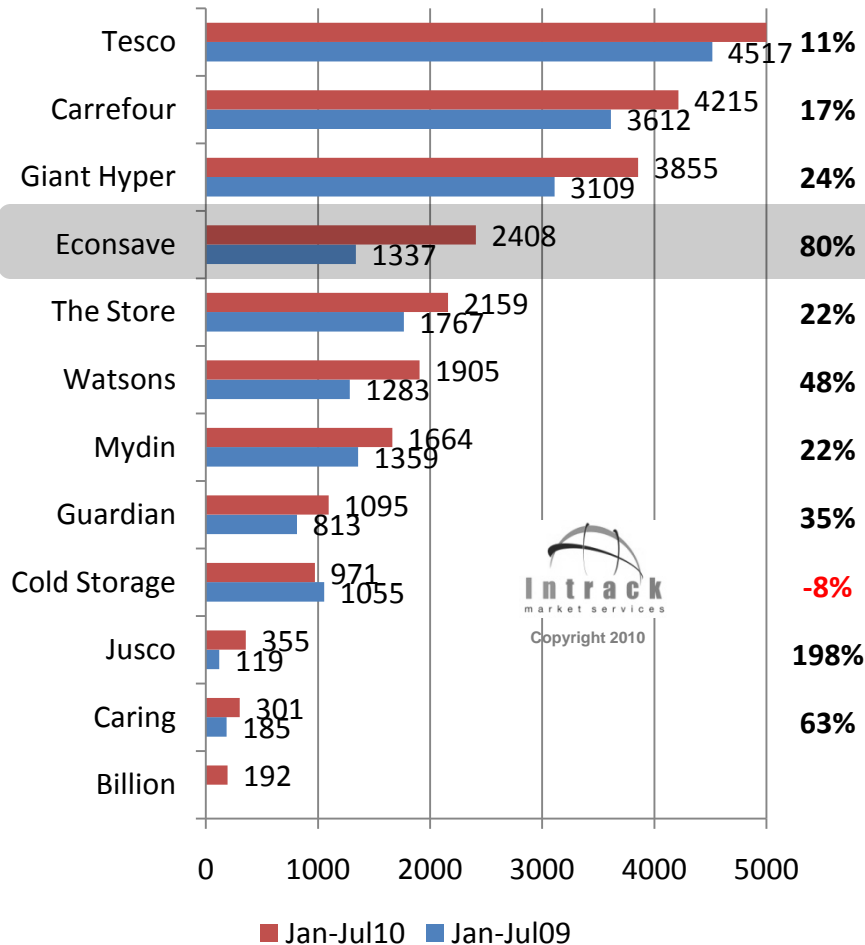
Newspaper Features by Department Jan-Jul 10 vs. 09



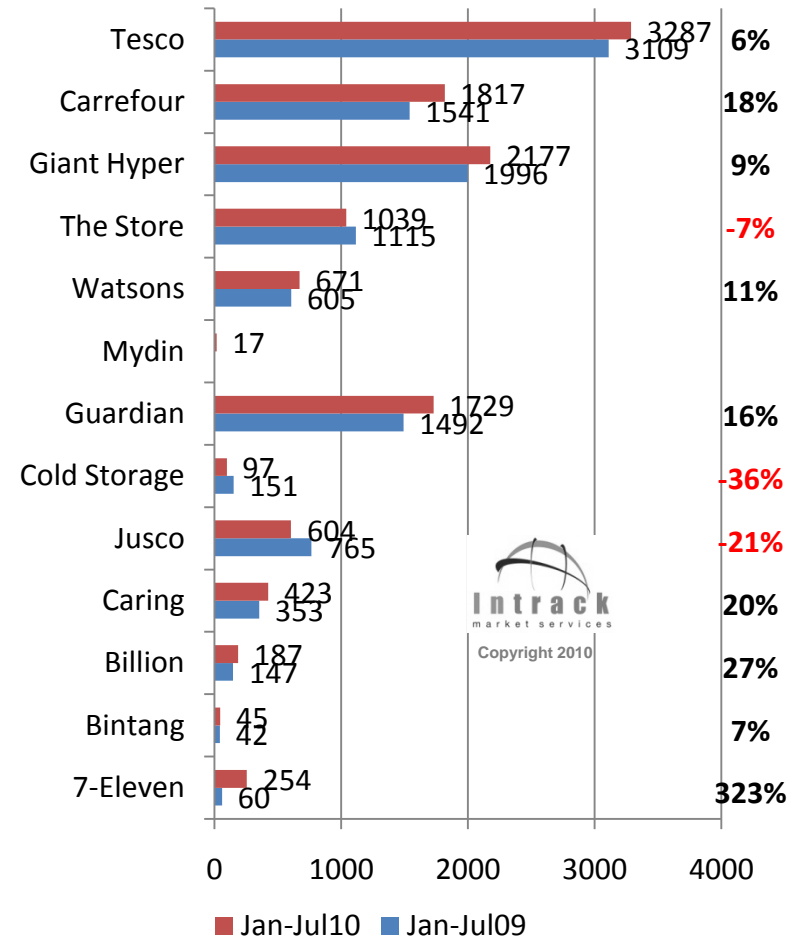
Source: MailerTrack – All Channels, excluding Regional promotion, Jan-Jul2010 vs. Jan-Jul2009

Eonsave has the 4th most mailer features and grew by 80%, however they do not have any newspaper promotions

Mailer Features by Retailer Jan-Jul 10 vs. 09



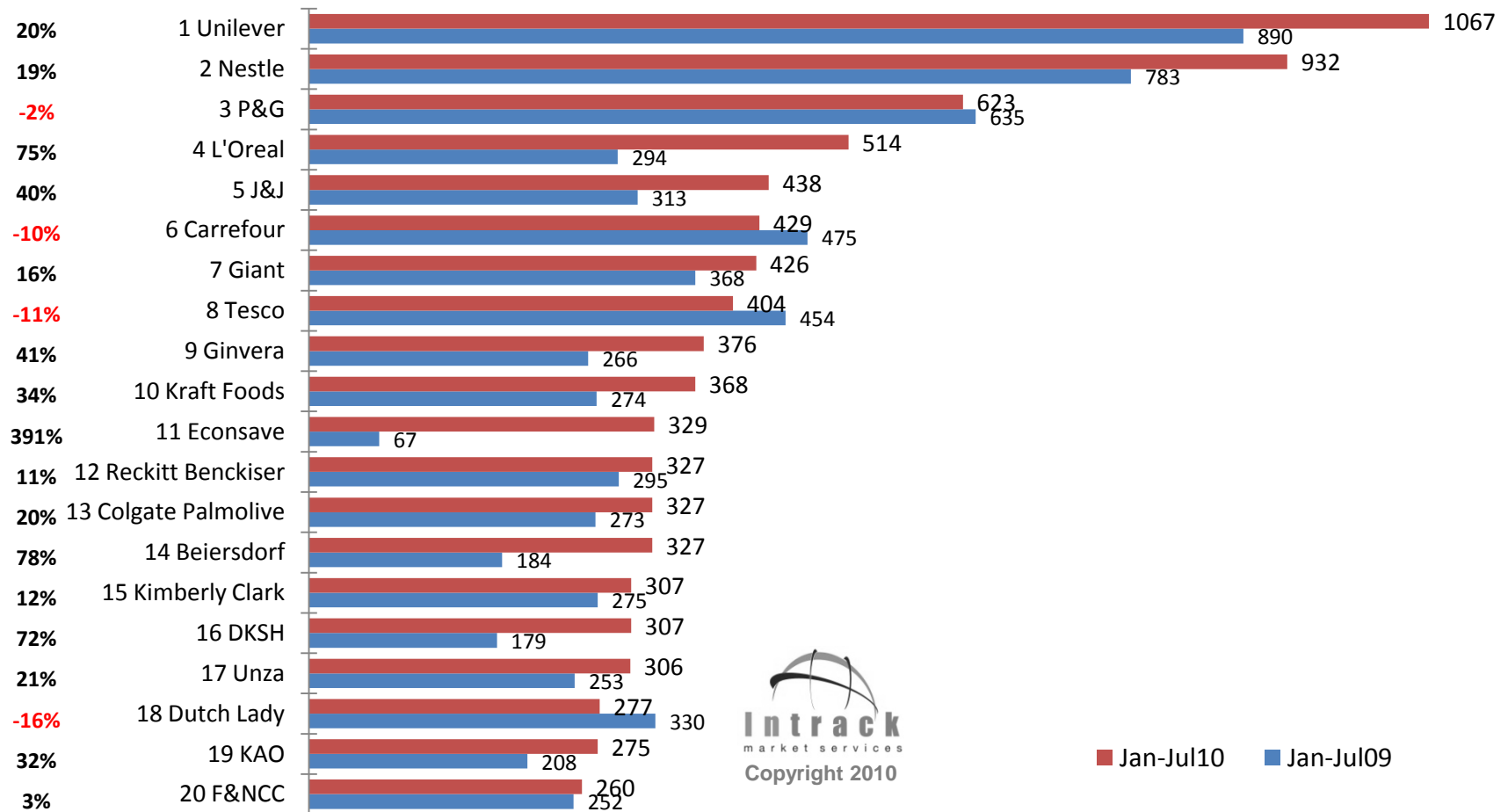
Newspaper Features by Retailer Jan-Jul 10 vs. 09



Source: MailerTrack – All Channels, excluding Regional promotion, Jan-Jul2010 vs. Jan-Jul2009

Amongst the top 20 most promoted manufacturers in mailers, P&G, Carrefour, Tesco & Dutch Lady have decreased their mailer features

Mailer Features by Manufacturer Jan-Jul 10 vs. 09



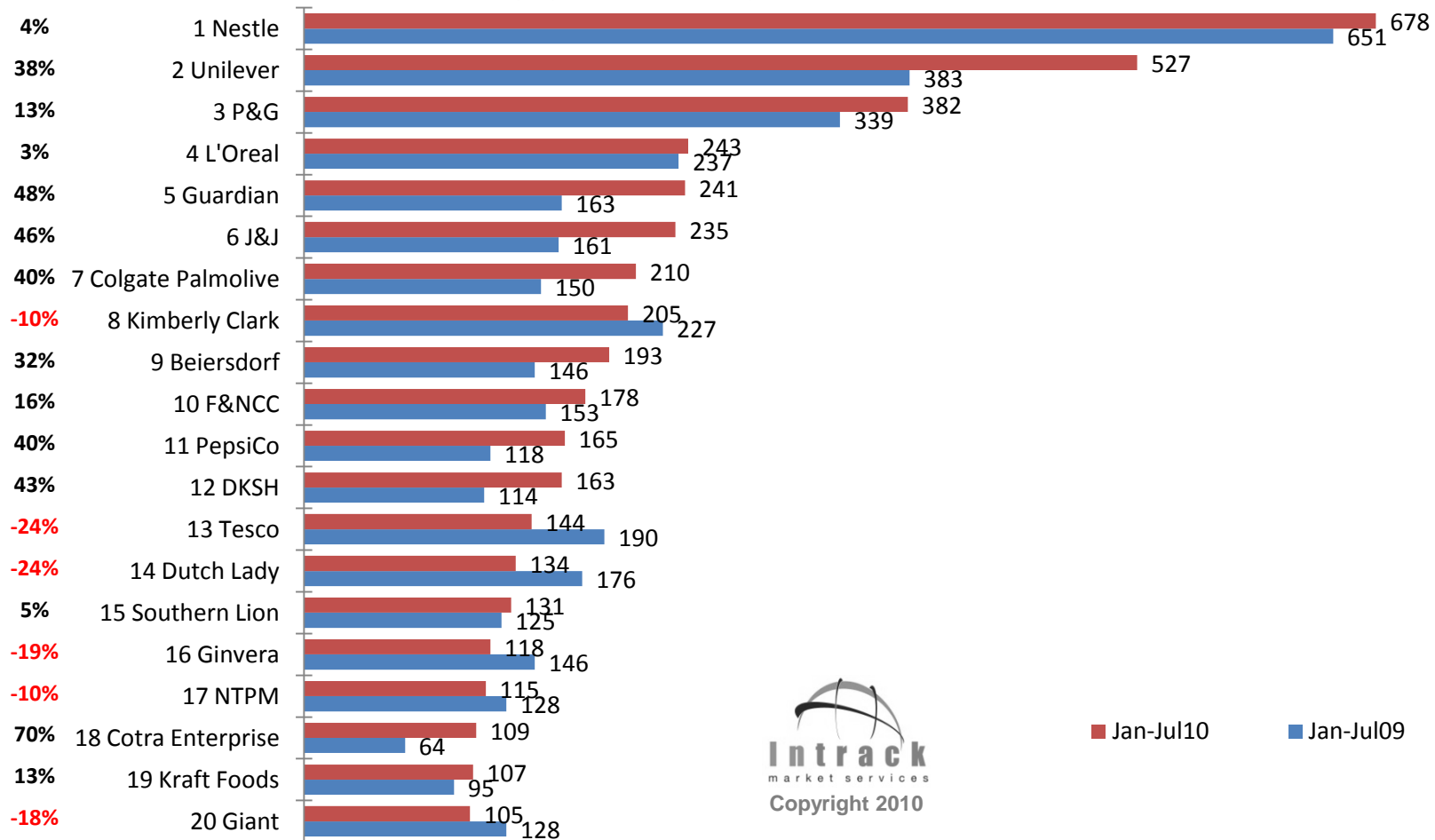
■ Jan-Jul10 ■ Jan-Jul09

Source: MailerTrack – All Channels, excluding Regional promotion, Jan-Jul2010 vs. Jan-Jul2009

Note: Only top 20 manufacturers shown

Kimberly Clark, Tesco, Dutch Lady, Ginvera, NTPM & Giant have declined in newspaper features

Newspaper Features by Manufacturer Jan-Jul 10 vs. 09



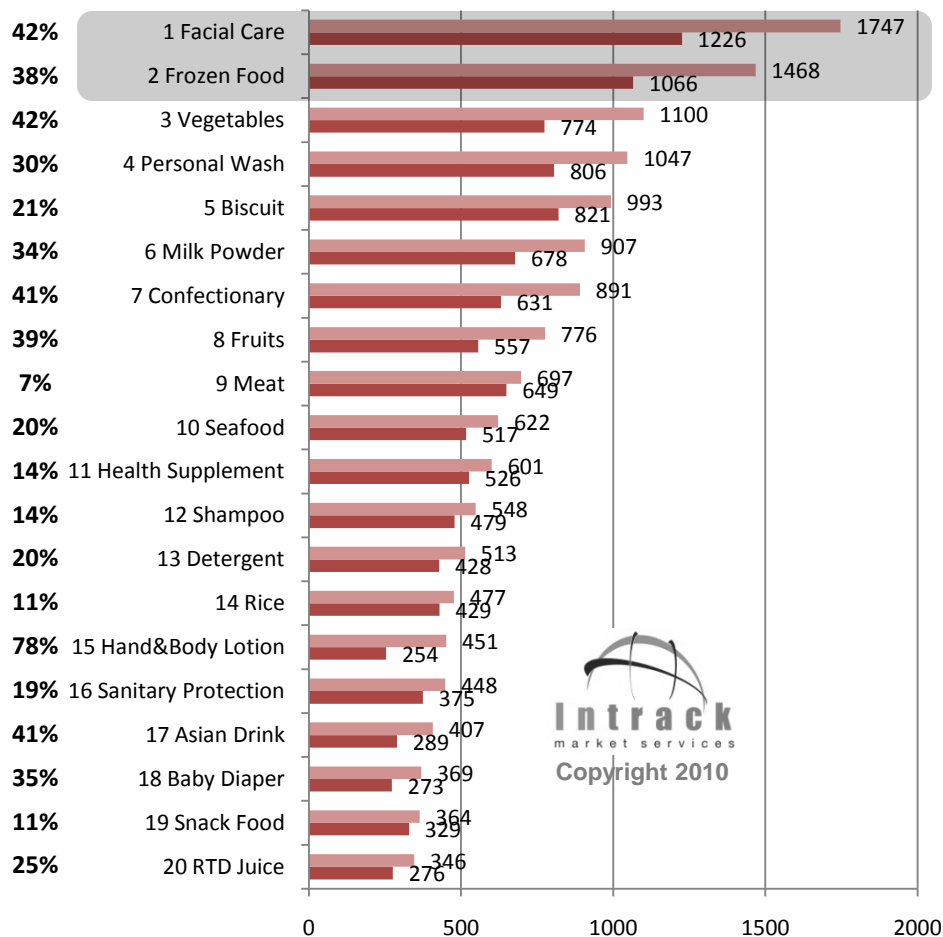
■ Jan-Jul10 ■ Jan-Jul09

Source: MailerTrack – All Channels, excluding Regional promotion, Jan-Jul2010 vs. Jan-Jul2009

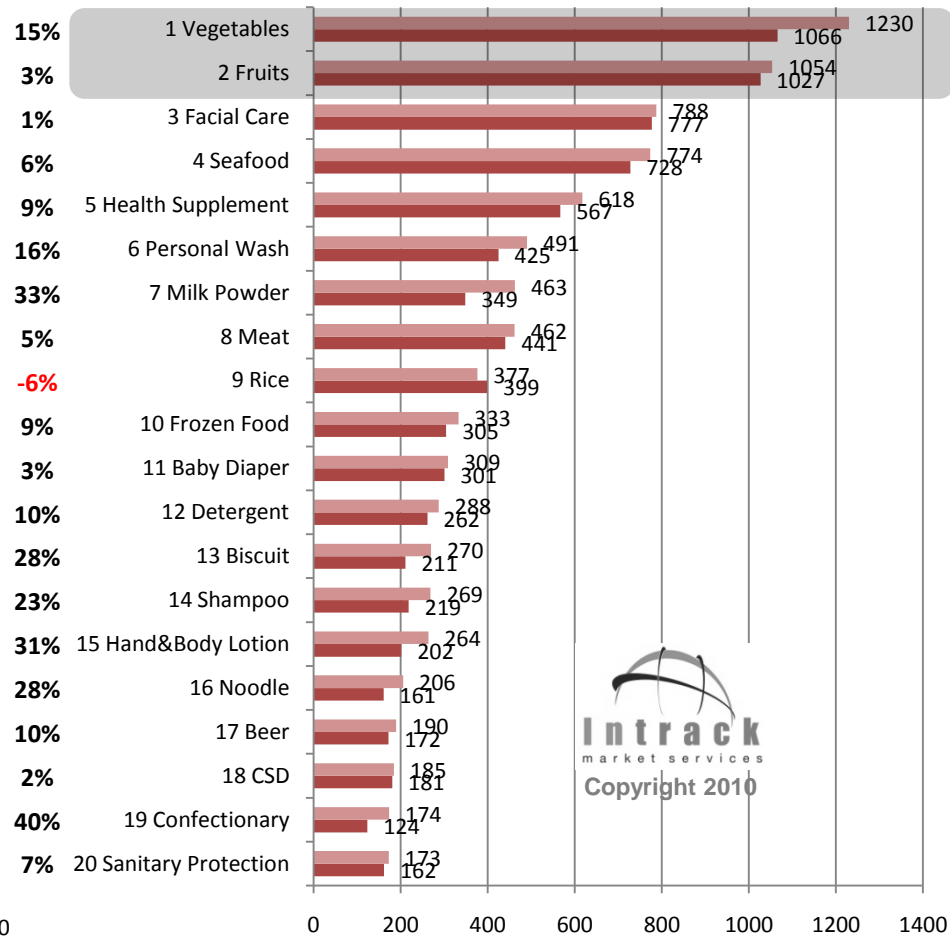
Note: Only top 20 manufacturers shown

Facial care is the most promoted category in Mailer and its features grew by 42%. In newspapers, Fresh categories are the most promoted. Only newspaper features for Rice has declined

Mailer Features by Category Jan-Jul 10 vs. 09



Newspaper Features by Category Jan-Jul 10 vs. 09

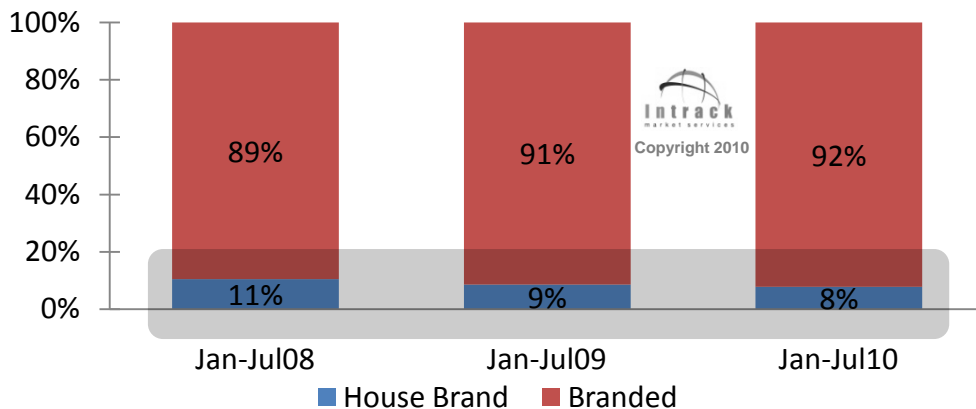


Source: MailerTrack – All Channels, excluding Regional promotion, Jan-Jul2010 vs. Jan-Jul2009

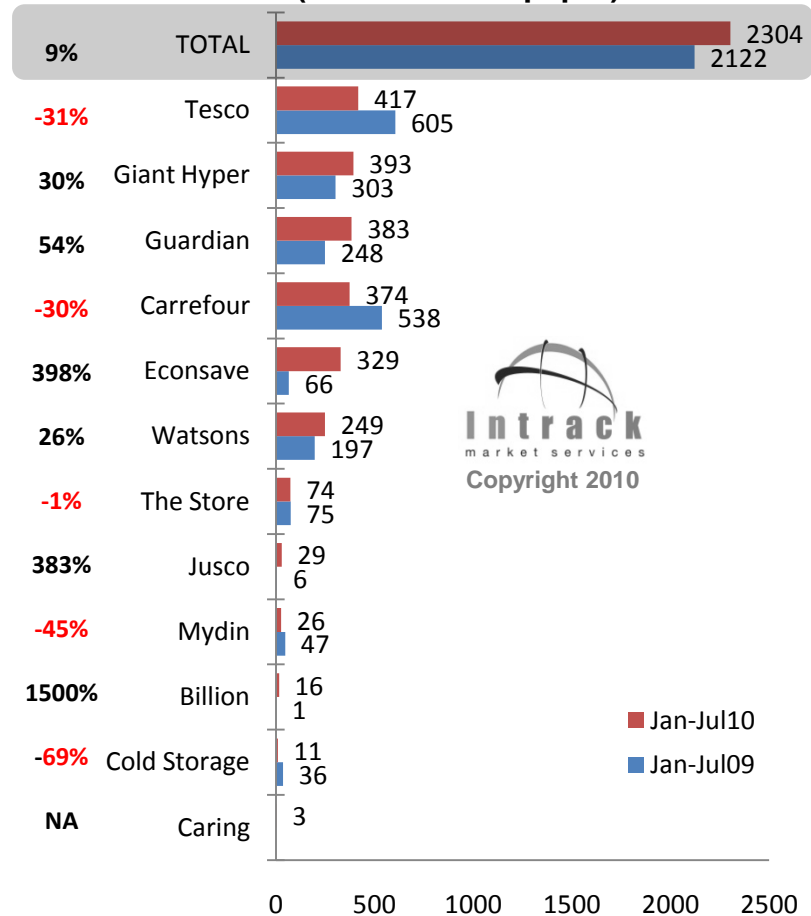
Note: Only top 20 categories shown

Overall House Brand promo features increased by 9%. However House Brand share of features declining, falling from 11% in Jan-Jul 08 to 8% in Jan-Jul 10

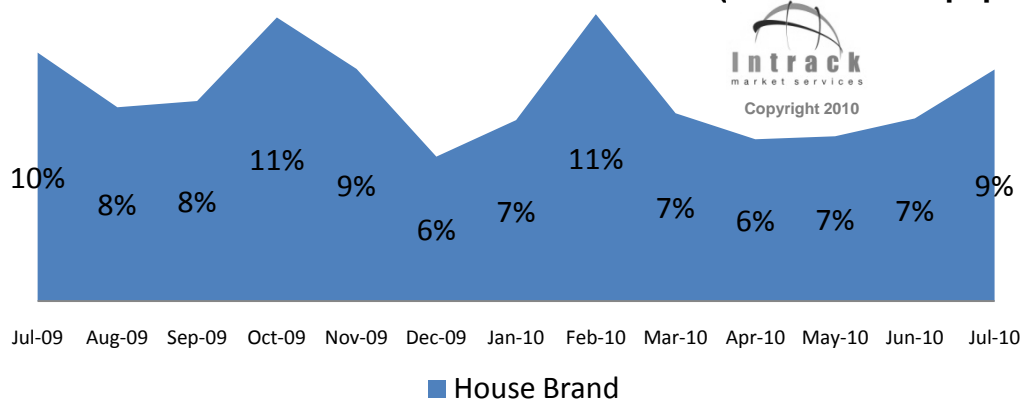
House Brand Features by year (Mailer & Newspaper)



House Brand Features by Retailer (Mailer & Newspaper)



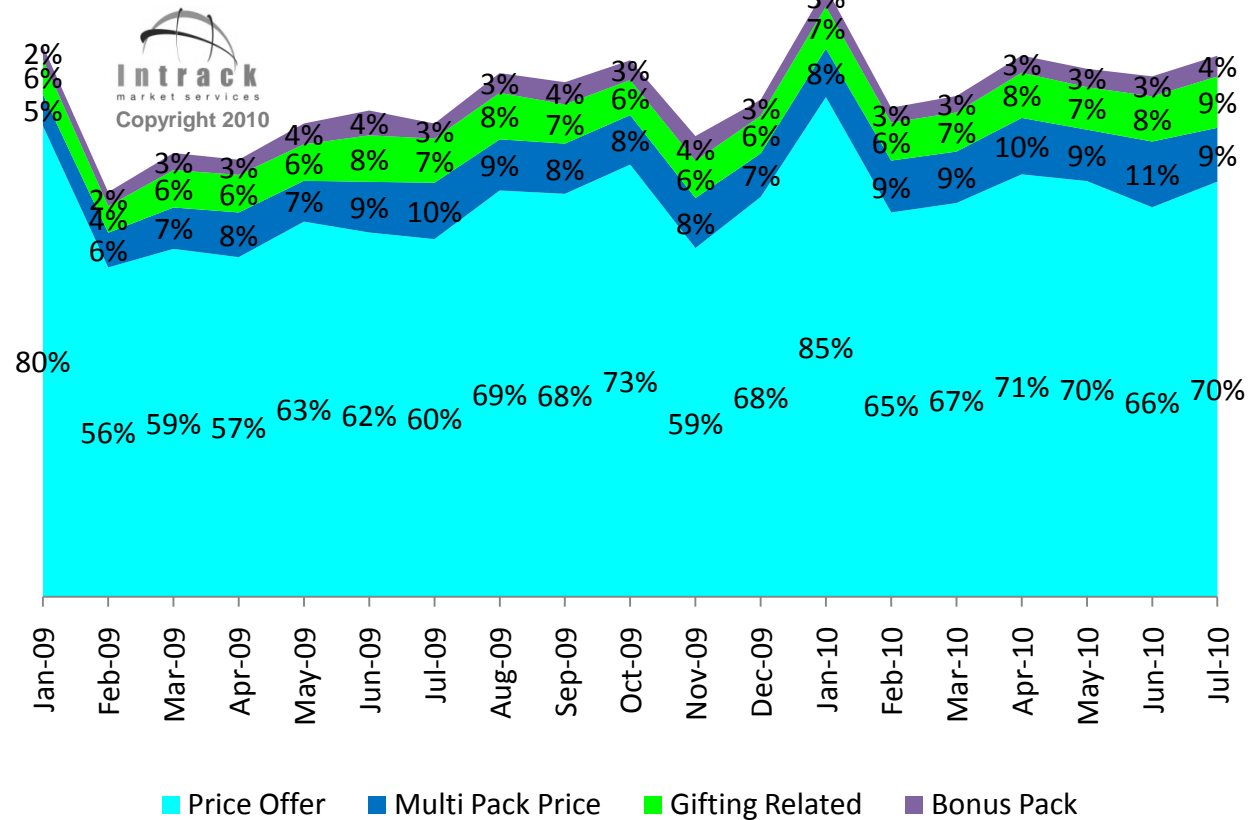
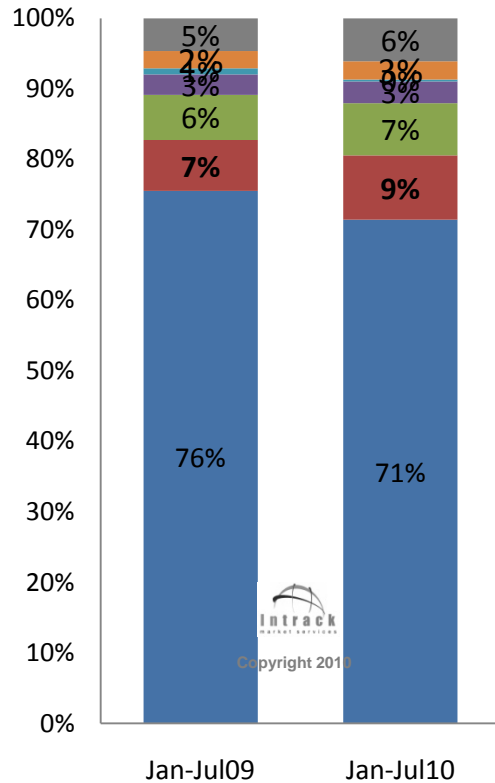
House Brand Trended Features Last 12 months (Mailer & Newspaper)



Source: MailerTrack – All Channels, excluding Regional promotion & FRESH Dept, Jan-Jul2010 vs. Jan-Jul2009

Single Pack Price Offer mechanics reduced in Jan-Jul10; while Multipack Price Offer & Gifting Related mechanics increased

Promotion Mechanics Trend Total Categories (Mailer & Newspaper)



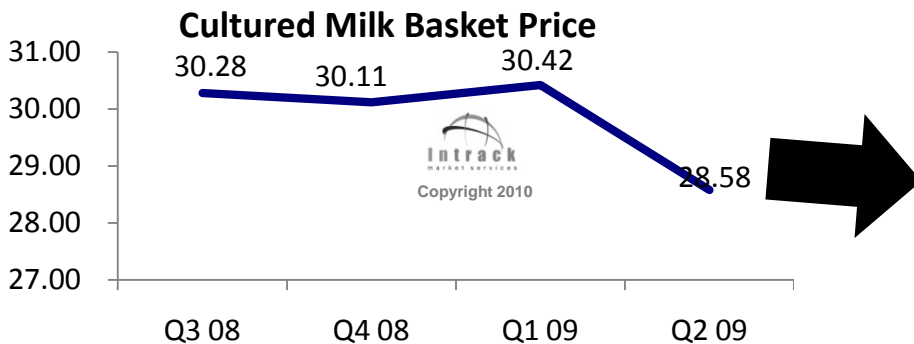
Source: Mailer Track – All Channels, excluding Regional promotion



What is Promotion Basket Price?

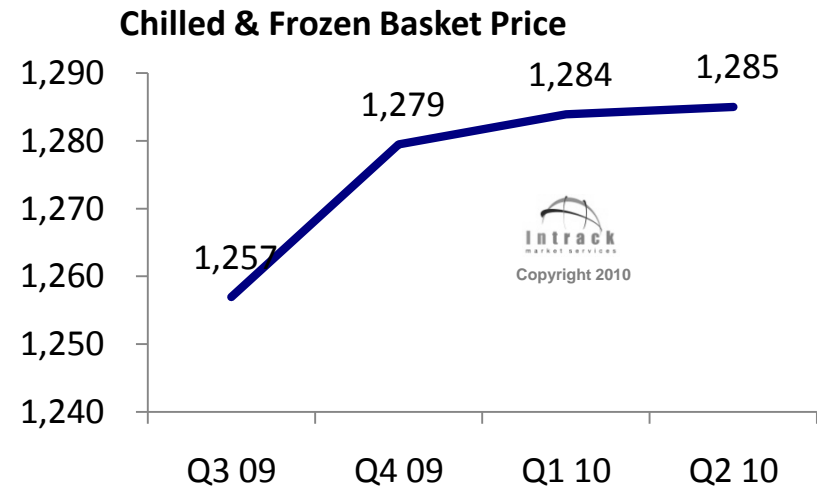
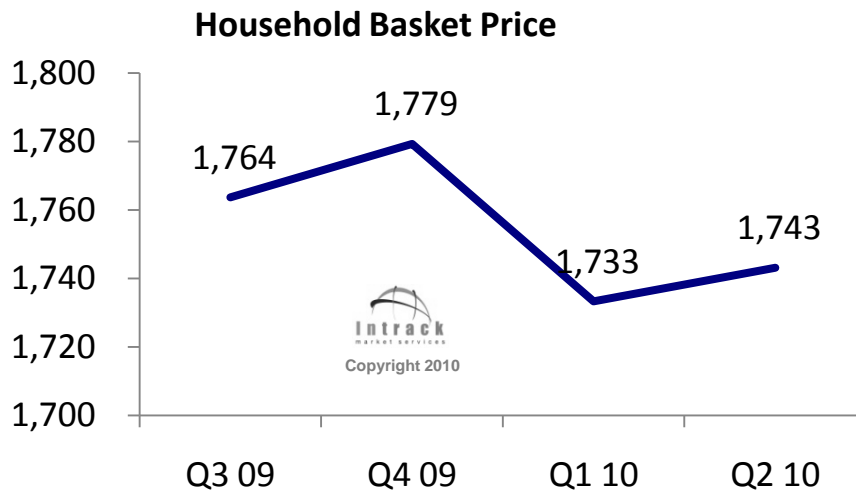
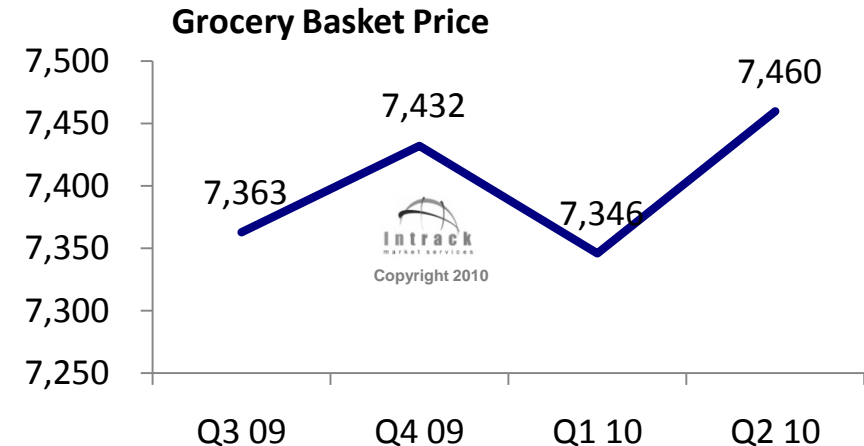
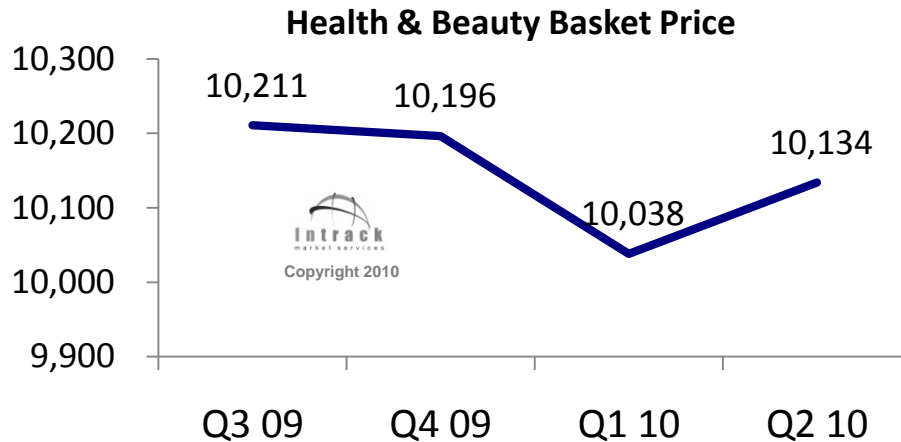
- Basket price derive from summation of average SKU promotion price within the department or categories that being promoted at least once in every 4 quarters period (The list comprised of 1530 items across various categories)
- We use the average of both mailer & newspaper promotion price for all retailers that we tracked

These are SKUs that at least being advertised once in either leaflet or newspaper of all retailers. The price is average of both leaflet and/or newspaper promotion price of all retailers combined.



Category	Product Name	Q308	Q408	Q109	Q209
Cultured Milk	Nutrigen Cultured Milk 5x125ml	3.10	3.29	3.19	3.10
Cultured Milk	Solivite Cultured Milk 5x150ml Assort	3.45	3.49	3.49	3.43
Cultured Milk	Vitagen 5x125ml Assort	3.59	3.58	3.59	3.59
Cultured Milk	Vitagen 5x125ml Twin pack Assort	7.15	7.15	7.20	6.46
Cultured Milk	Vitagen Collagen 5x125ml Assort	5.59	5.39	5.64	4.58
Cultured Milk	Vitagen Less Sugar 5x125ml Assort	3.89	3.79	3.99	3.96
Cultured Milk	Yoco Cultured Milk 5x120ml Assort	3.52	3.43	3.34	3.46
	Basket Sum	30.28	30.11	30.42	28.58

All 4 department's categories' promotion price had increased in the 2nd quarter of 2010



Source: MailerTrack – All Channels, Mailer & Newspaper combine excluding Regional promotion

Average Promotion Price of these most promoted SKUs mostly increased in Q2 2010



Dept	Product Name	Category	Q3 09	Q4 09	Q1 10	Q2 10
Grocery	Milo Softpack 2kg	Health Food Drink	23.39	24.20	25.34	26.99
	Dutch Lady 123/ 456 Honey/Vanilla/Chocolate 1kg	Milk Powder	18.53	19.11	18.92	18.87
	Naturel Blend Sunflower & Canola Oil 3kg	Oil	23.44	23.59	22.19	22.20
	Pepsi PET 1.5lit Assort	CSD	2.19	2.37	2.39	2.39
	Jacob's Assorted Cracker 750gm-800gm	Biscuit	11.06	10.55	11.13	10.48
Health & Beauty	Sunsilk Shampoo 375ml Assort	Shampoo	10.67	11.28	10.28	11.37
	Drypers Wee Wee Dry Baby Diaper M84/L72/XL60	Baby Diaper	32.98	34.05	33.44	32.03
	Lux Shower Liquid 700ml Assort	Personal Wash	12.61	12.18	11.10	11.34
	Kotex Soft & Smooth Maxi 2x30s	Sanitary Protection	11.32	12.31	11.23	12.36
	Darlie Double Action Toothpaste 2x250gm	Toothpaste	11.86	11.62	10.79	10.63
Household	Dynamo Liq Detergent 4.7kg Assort	Detergent	21.18	22.17	20.55	19.75
	Glo Dishwash Liquid 900ml Assort	Dishwashing Agent	3.45	3.70	2.97	3.46
	Softlan Fabric Softener 3lit Assort	Fabric Softener	7.56	7.54	7.72	6.99
	Scott Kitchen Towel Regular 6s	Kitchen Towel	7.92	8.75	7.99	8.07
	Scott Extra Regular Toilet Roll 20s	Toilet Roll	10.12	10.92	10.00	9.69
Chilled & Frozen	Ayamas Golden Nuggets 850gm	Frozen Food	8.25	8.24	8.11	8.97
	Vitagen 5x125ml Assort	Cultured Milk	3.59	3.60	3.60	3.68
	Marigold HL Low Fat Milk 1lit Assort	Pasteurised Milk	4.61	4.62	4.64	4.61
	Sunkist Juice Orange/ Apple 1.89lit	RTD Juice	6.27	6.50	6.59	6.47
	Nestle Bliss Low Fat Yogurt Drink 700ml Assort	Yogurt Drink	3.76	3.80	3.85	3.94