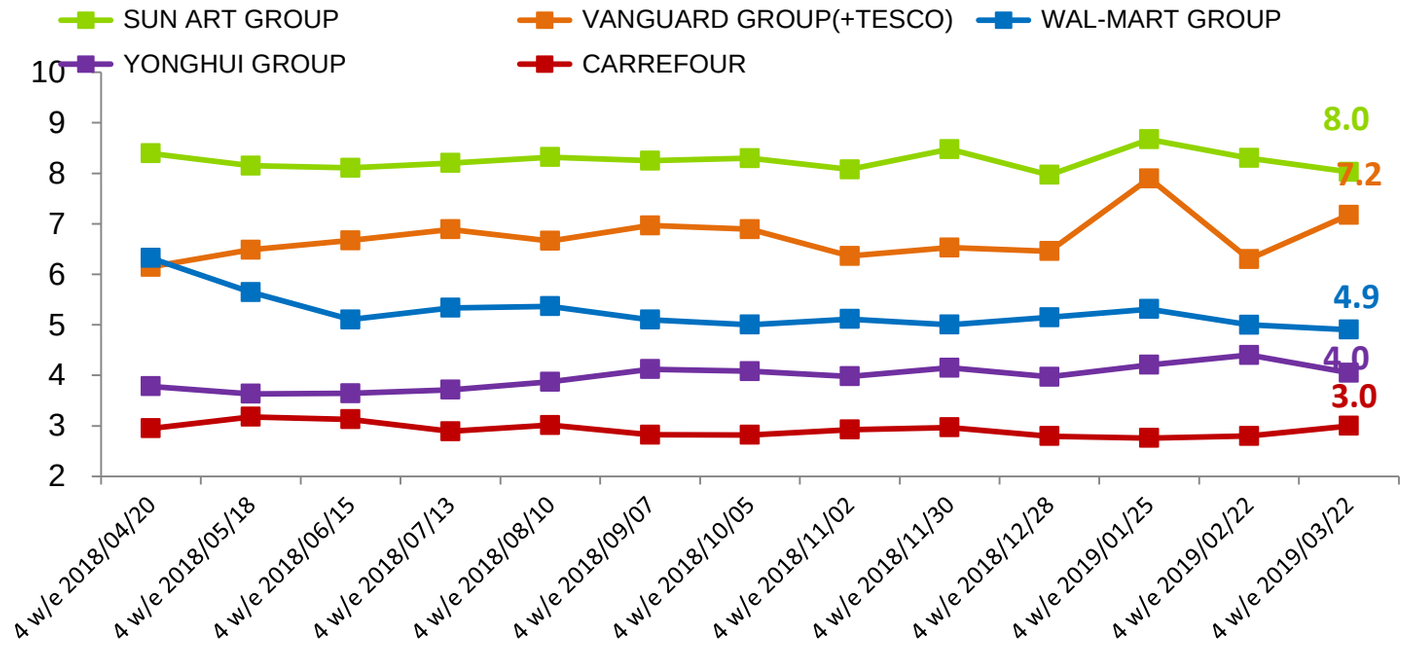
March. 2019 | Retail Snapshot

4 week share tracking of top 5 retail groups

Value Share (%) within Modern Trade – National China D+



Vanguard Group improved share and narrowed the gap with Sun Art Group. Carrefour showed a slight pick up in March.

12 week KPI performance vs. last year for top 5 groups

12 w/e P3 2019 vs 12w/e P3 2018: Penetration vs Trip Spend vs Frequency – National China D+

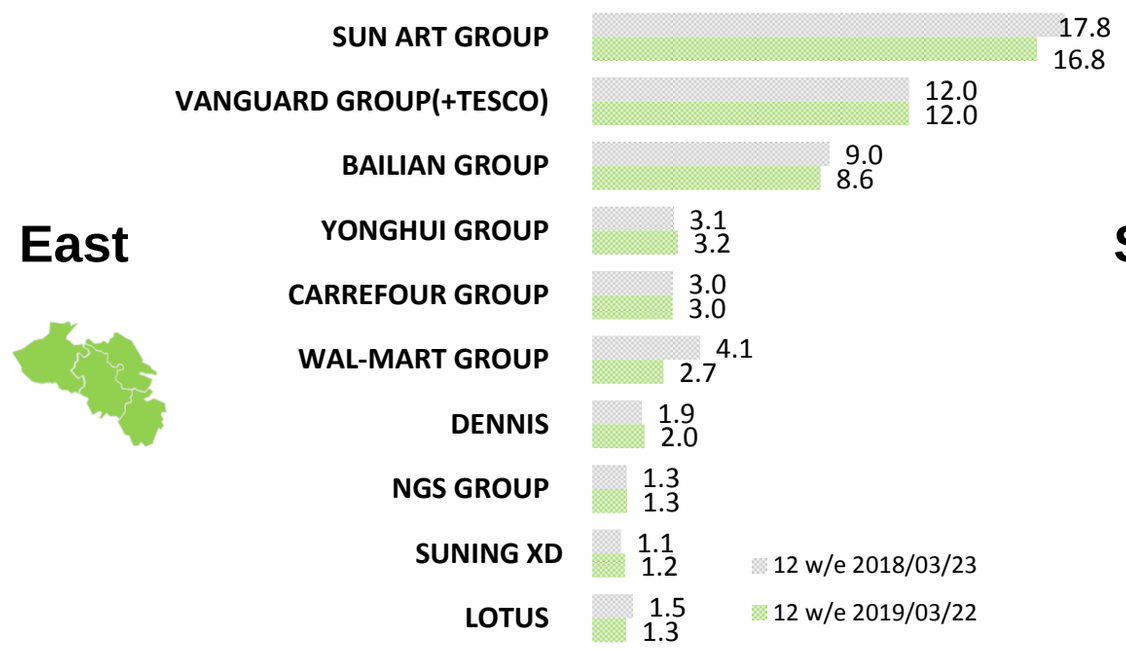
	More Shoppers?		Higher Value Baskets?		More Trips?	
大潤發 RT-MART / Auchan	17.2%	-4.9%	106.7 RMB	+0.9%	4.1 trips	-2.5%
Vanguard 华润万家 / 乐购	13.9%	-2.2%	106.4 RMB	+1.7%	4.3 trips	-2.6%
Walmart 中国	12.2%	-6.6%	111.2 RMB	+2.4%	3.4 trips	-18.2%
永辉超市 YONGHUI SUPERSTORES	10.3%	+3.9%	89.8 RMB	-2.4%	4.1 trips	+0.4%
Carrefour	7.3%	-12.4%	111.4 RMB	+4.1%	3.2 trips	0.0%

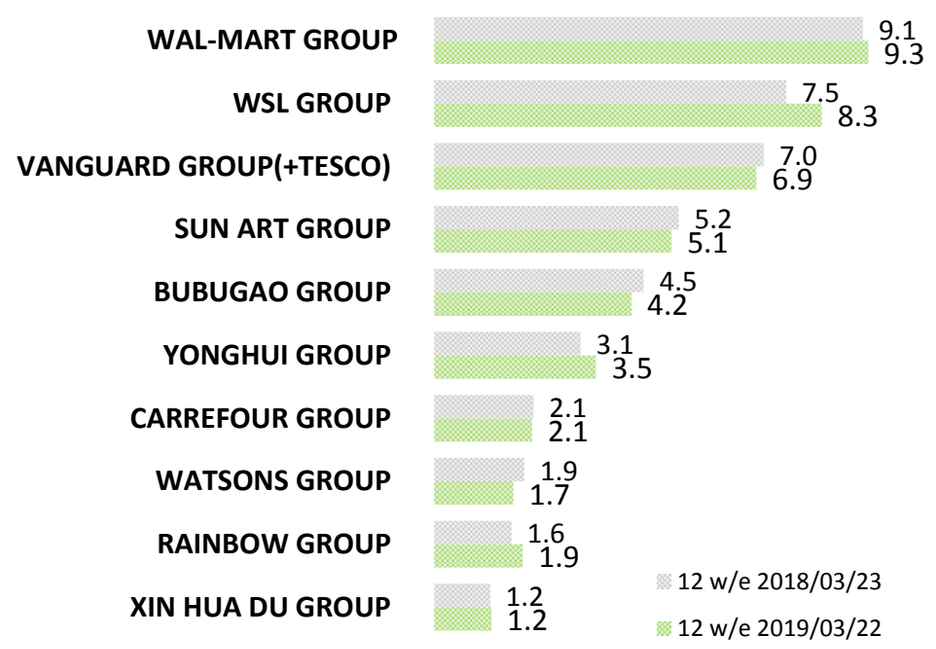
Walmart and Carrefour both enjoyed bigger basket but face severe challenges in penetration loss.

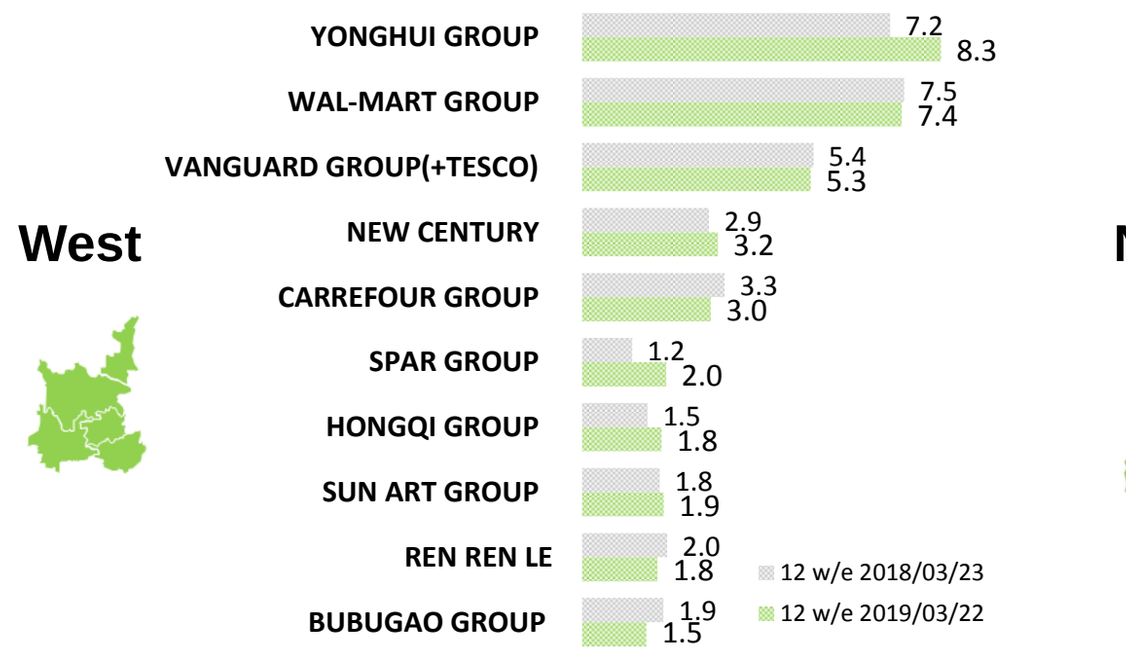
With the opening of more small format stores, Yonghui started to experience dilution in basket size.

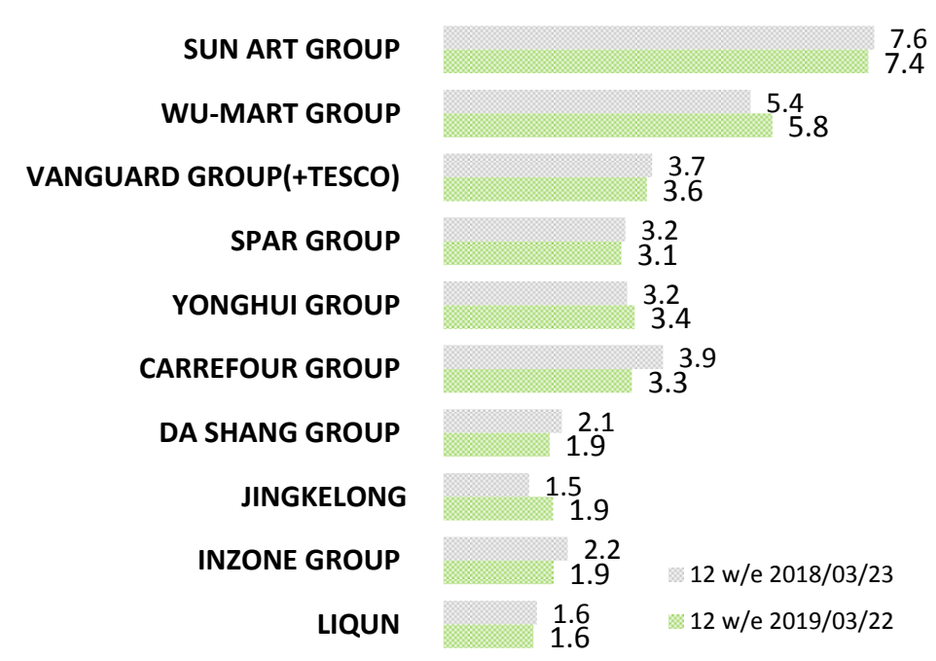
12 week share tracking of top 10 retail groups in four regions

Sun Art experienced share losses in most regions; Yonghui and Wu-mart gained share in the West and North respectively









SUN ART Group includes Auchan and RT-Mart; WAL-MART Group includes Wal-Mart, Trust-mart, Sam's Club; VANGUARD GROUP includes Vanguard, Ole, Huarun SG, Hongkelong, TESCO; BAILIAN Group includes Century Mart, GMS, Lian Hua, Hua Lian, Quik etc. Bubugao Group includes Bubugao, Nancheng. Hongqi Group includes Hongqi and Huhui. Watsons Group includes Parknshop, Watsons, Taste

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