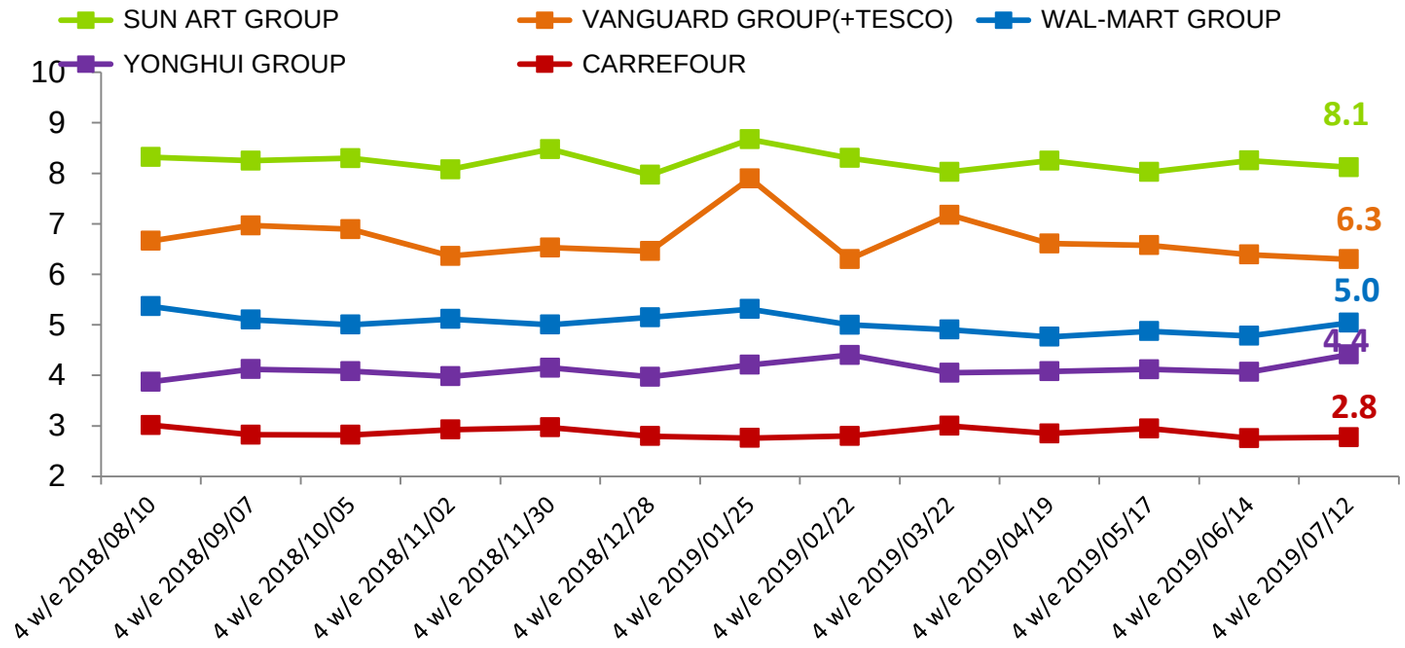
August. 2019 | Retail Snapshot

4 week share tracking of top 5 retail groups

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



Wal-Mart and Yonghui Group improved share in July.

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

12 w/e P7 2019 vs 12w/e P7 2018: Penetration vs Trip Spend vs Frequency – National China D+

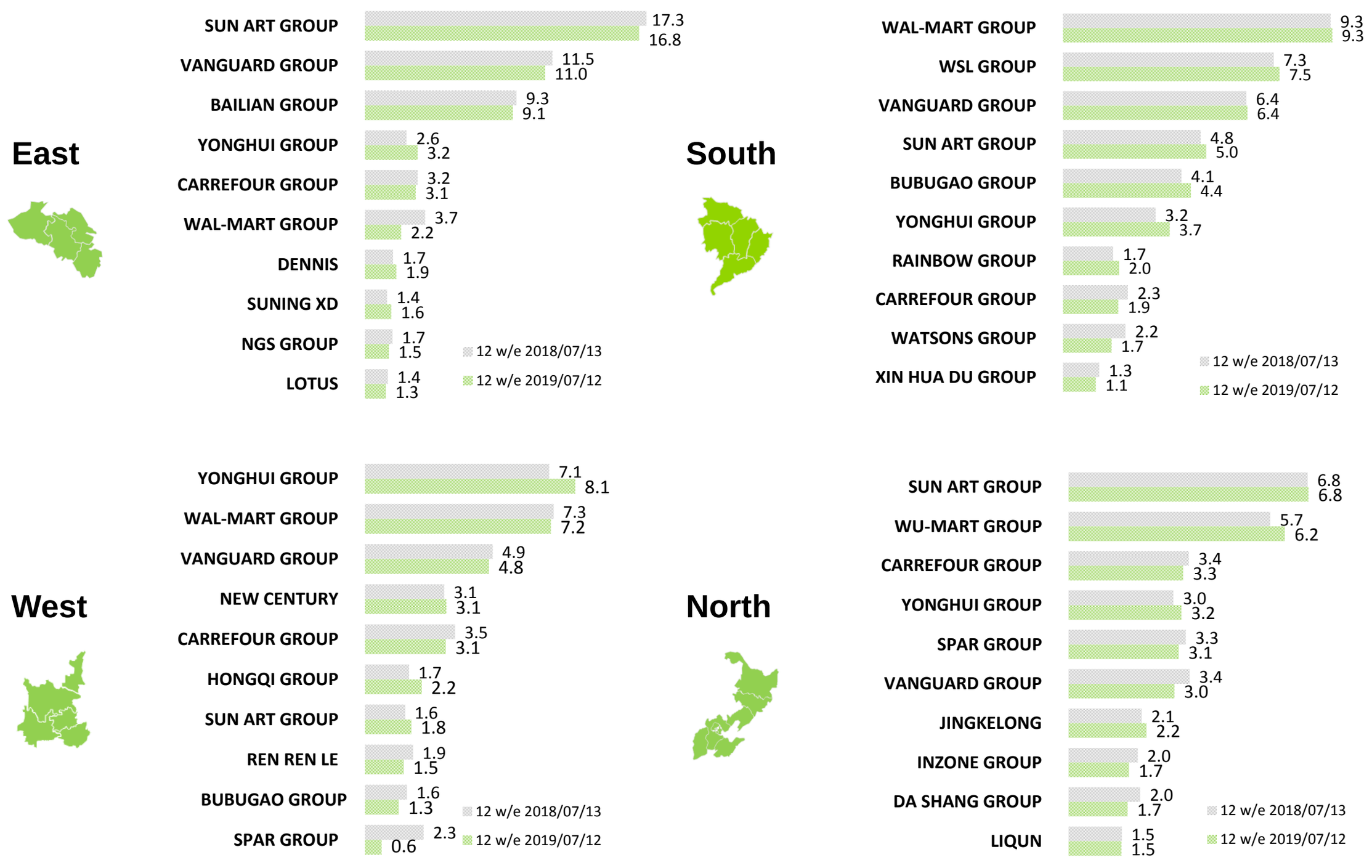
	More Shoppers?		Higher Value Baskets?		More Trips?	
大潤發 RT-MART / Auchan	16.4%	-3.5%	94.1 RMB	+0.3%	4.3 trips	+2.7%
Vanguard 华润万家 / 乐购	12.6%	-6.1%	93.9 RMB	+2.7%	4.4 trips	-0.6%
Walmart 中国	11.6%	-8.2%	98.3 RMB	-0.3%	3.5 trips	-0.5%
永辉超市 YONGHUI SUPERSTORES	10.1%	+8.9%	80.2 RMB	+4.9%	4.2 trips	-0.1%
Carrefour	6.8%	-12.0%	103.0 RMB	+3.7%	3.3 trips	+0.8%

Most of top retailers are yet to recover their shopper loss though their basket value remained healthy.

Walmart saw a slow down in the decline of basket value and frequency.

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

The Sun Art Group continued to recover share in the South and West Regions. Walmart recovered and maintained share in south region, especially in Guangdong, Hunan and Hubei.



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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