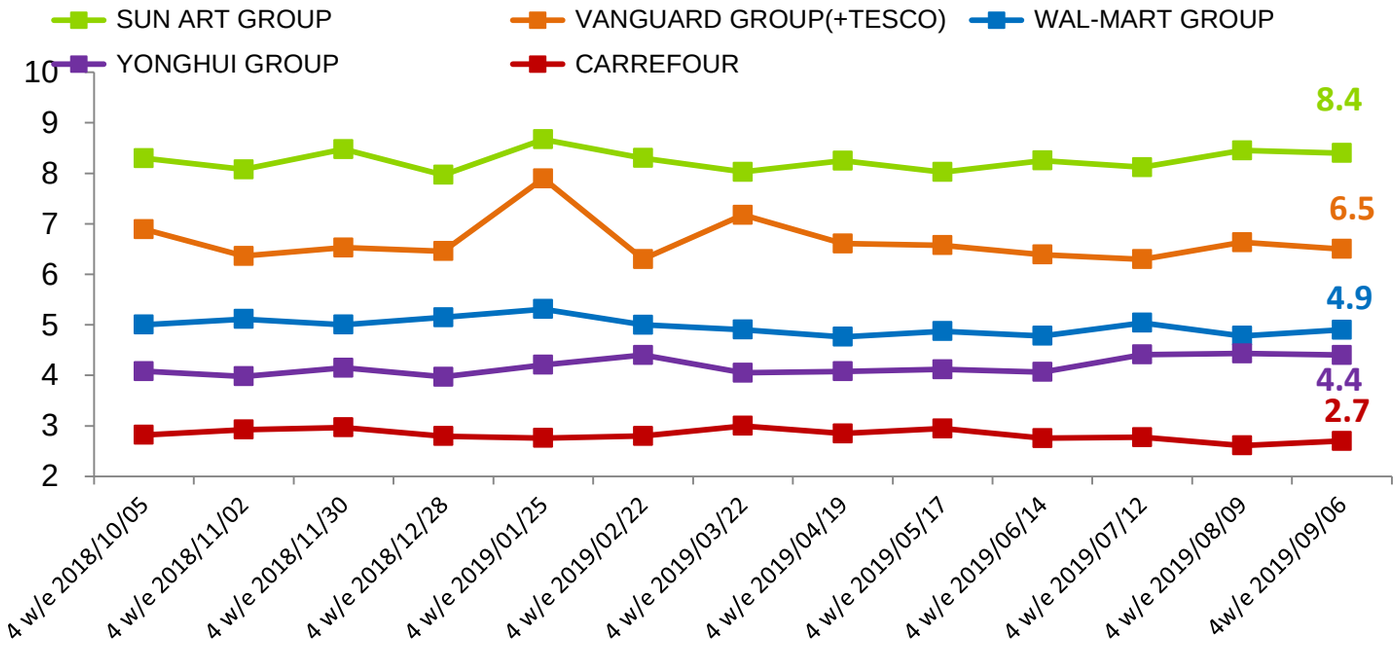
September. 2019 | Retail Snapshot

4 week share tracking of top 5 retail groups

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



WAL-MART group improved share in August while other top retailers kept flat or slightly decreased.

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

12 w/e P9 2019 vs 12w/e P9 2018: Penetration vs Trip Spend vs Frequency – National China D+

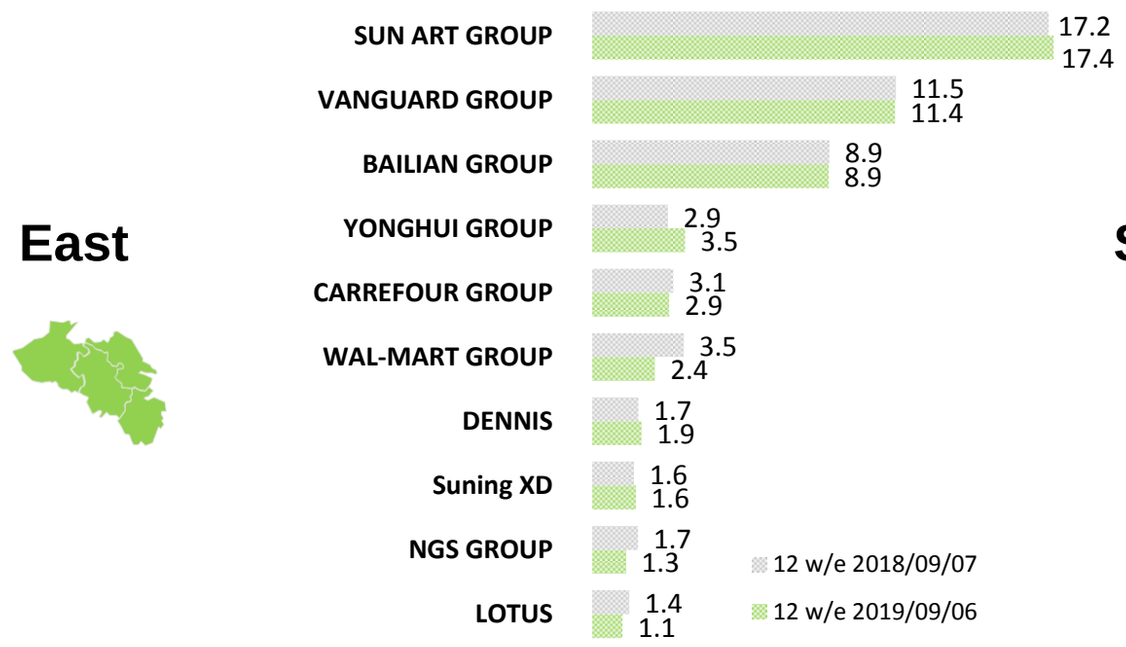
	More Shoppers?		Higher Value Baskets?		More Trips?	
大潤發 RT-MART / Auchan	16.6%	-3.8%	93.7 RMB	+2.4%	4.3 trips	+1.9%
Vanguard 华润万家 / 乐购	12.6%	-9.8%	93.4 RMB	+3.5%	4.5 trips	+1.3%
Walmart 中国	11.6%	-9.0%	96.1 RMB	-0.9%	3.5 trips	+2.6%
永辉超市 YONGHUI SUPERSTORES	10.4%	+5.5%	80.5 RMB	+6.0%	4.3 trips	+0.8%
Carrefour	6.7%	-11.9%	100.4 RMB	+5.5%	3.2 trips	-0.3%

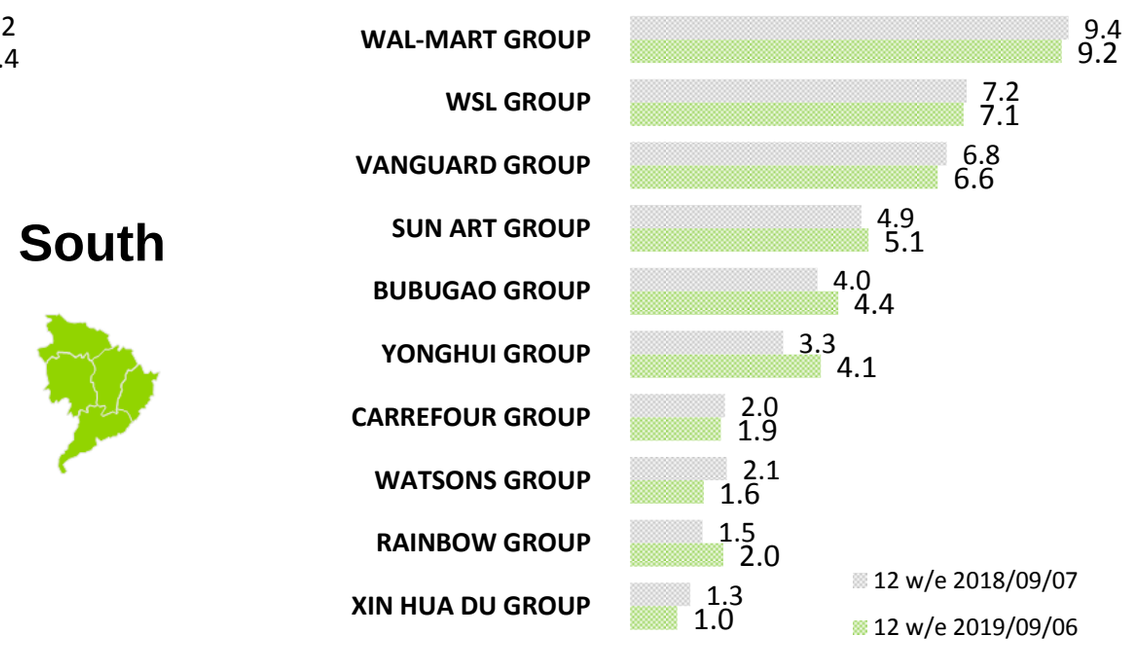
RT-Mart further mitigated the shopper loss problem, and improved frequency and basket value, thanks to new retail transformation.

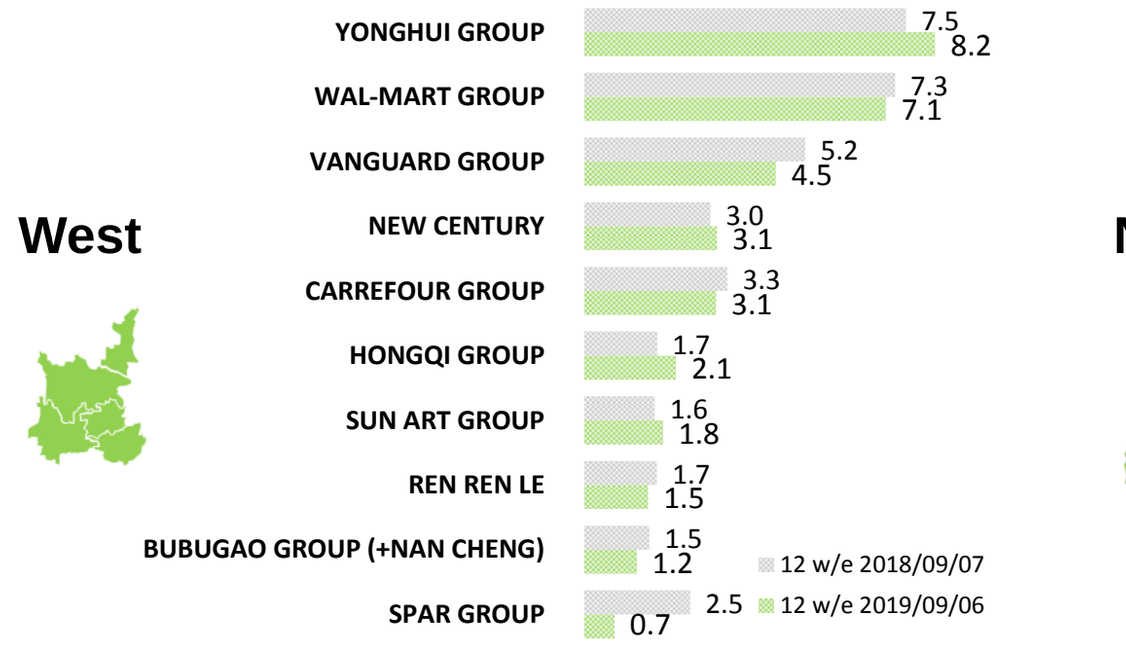
Yonghui kept outperformance and further narrowed the gap with Walmart.

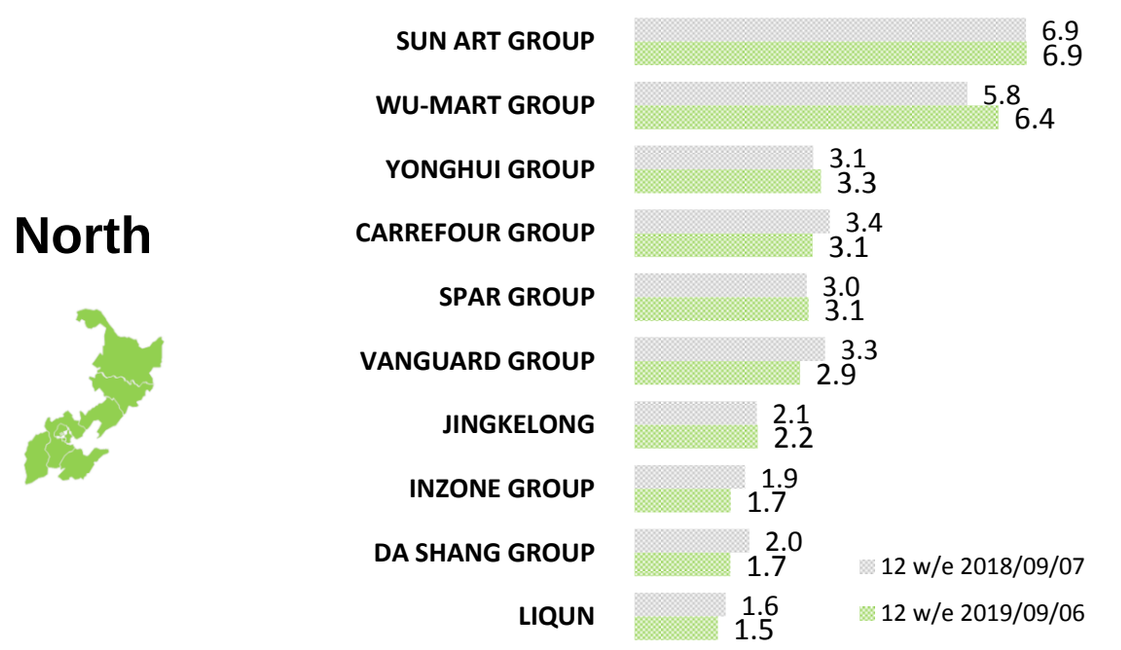
12 week share tracking of top 10 retail groups in four regions

Yonghui and Sun-Art Group advanced in all four regions. Bubugao Group and Rainbow Group made noticeable improvement in South region.









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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