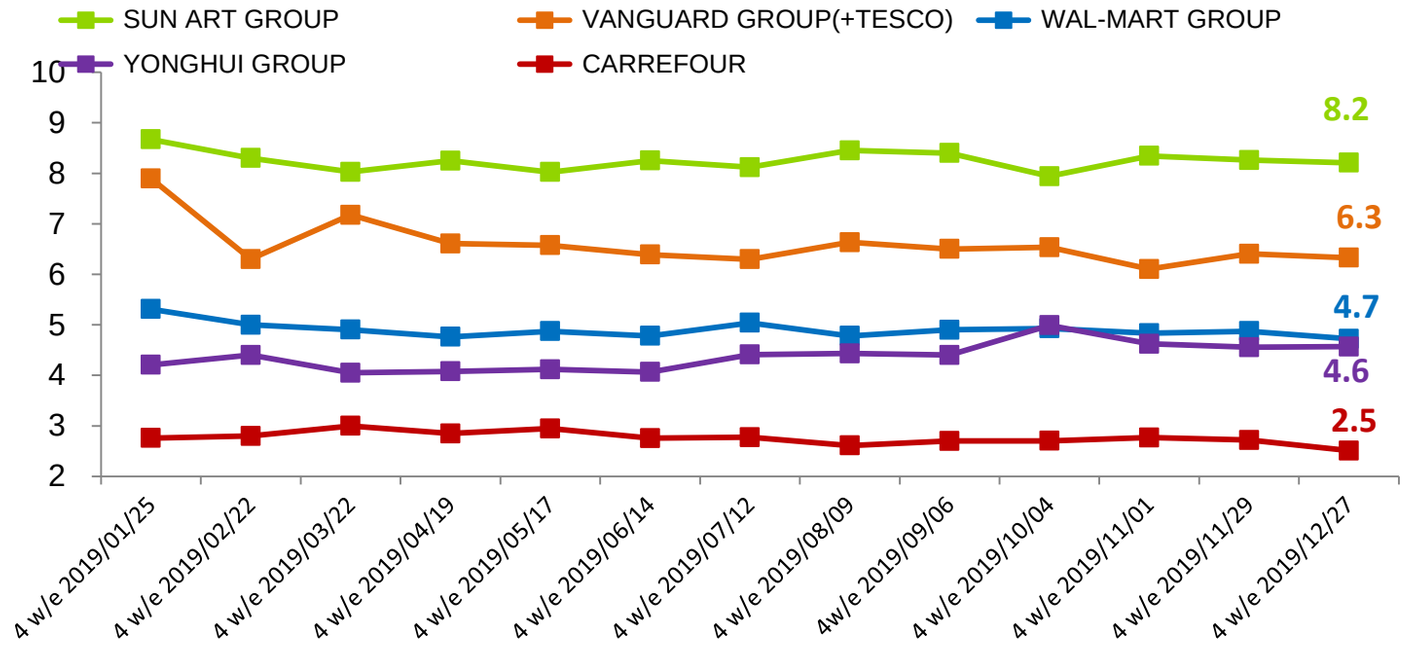
December. 2019 | Retail Snapshot

## 4 week share tracking of top 5 retail groups

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




Top 5 retailers' share either flat or slightly dropped in the last 4 weeks of 2019.

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

12 w/e P13 2019 vs 12w/e P13 2018: Penetration vs Trip Spend vs Frequency – National China D+

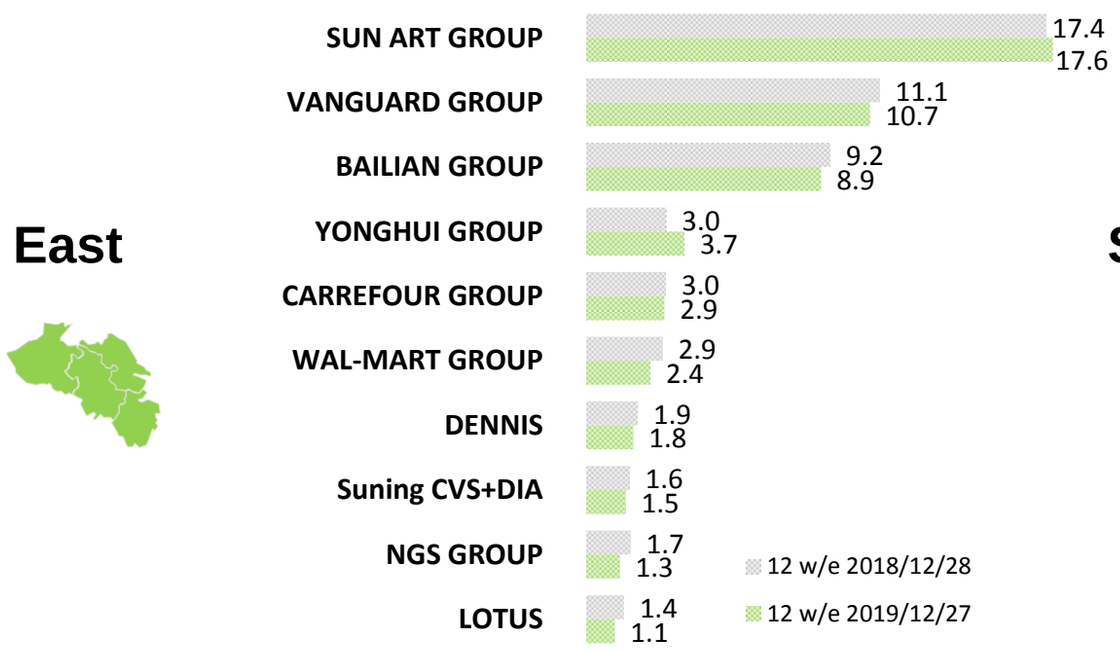
| | More Shoppers? | | Higher Value Baskets? | | More Trips? | |
|---|---|---|---|---|---|---|
| 大潤發 RT-MART / Auchan | 16.3% | -4.6% | 96.7 RMB | +3.1% | 4.1 trips | +0.2% |
| Vanguard 华润万家 / 乐购 | 12.5% | -10.0% | 93.3 RMB | +5.6% | 4.2 trips | -0.2% |
| Walmart 中国 | 11.3% | -10.1% | 96.5 RMB | +0.8% | 3.5 trips | +1.7% |
| 永辉超市 YONGHUI SUPERSTORES | 10.8% | +3.7% | 81.8 RMB | +5.1% | 4.1 trips | +1.6% |
| Carrefour | 6.6% | -13.8% | 104.5 RMB | +7.6% | 3.0 trips | -3.2% |

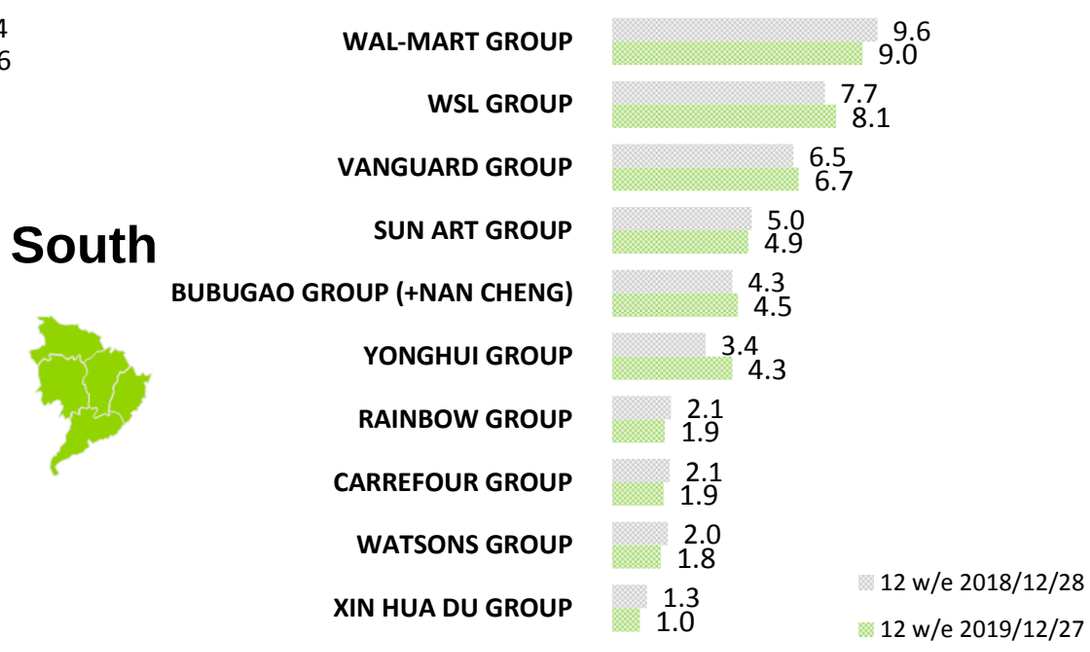
RT-Mart further mitigated the shopper loss problem, and improved frequency and basket value, thanks to new retail transformation.

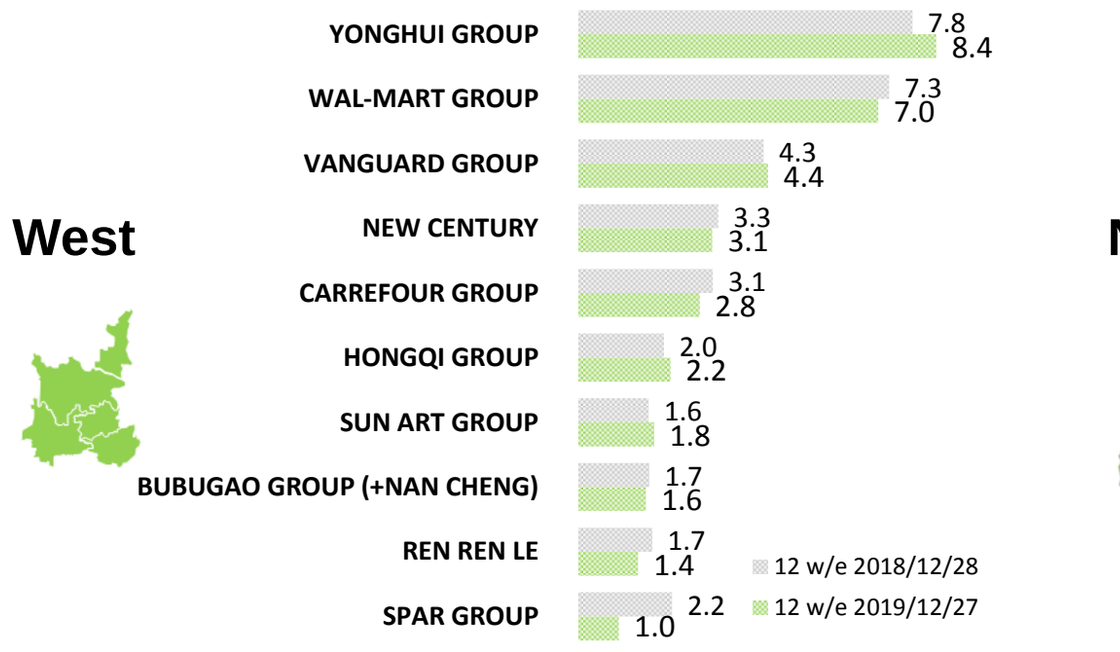
Yonghui kept outperformance and further narrowed the gap with Walmart.

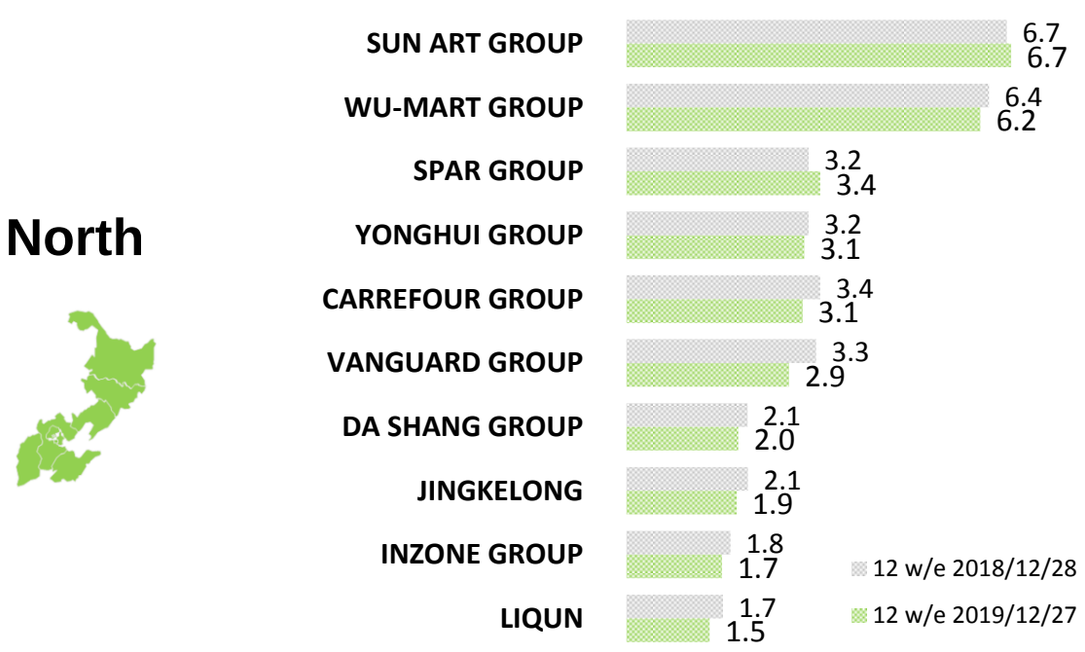
## 12 week share tracking of top 10 retail groups in four regions

Yonghui and Sun-art kept the expansion pace in most regions. WSL Group, Vanguard Group and Bubugao Group further consolidated their position in South.




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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