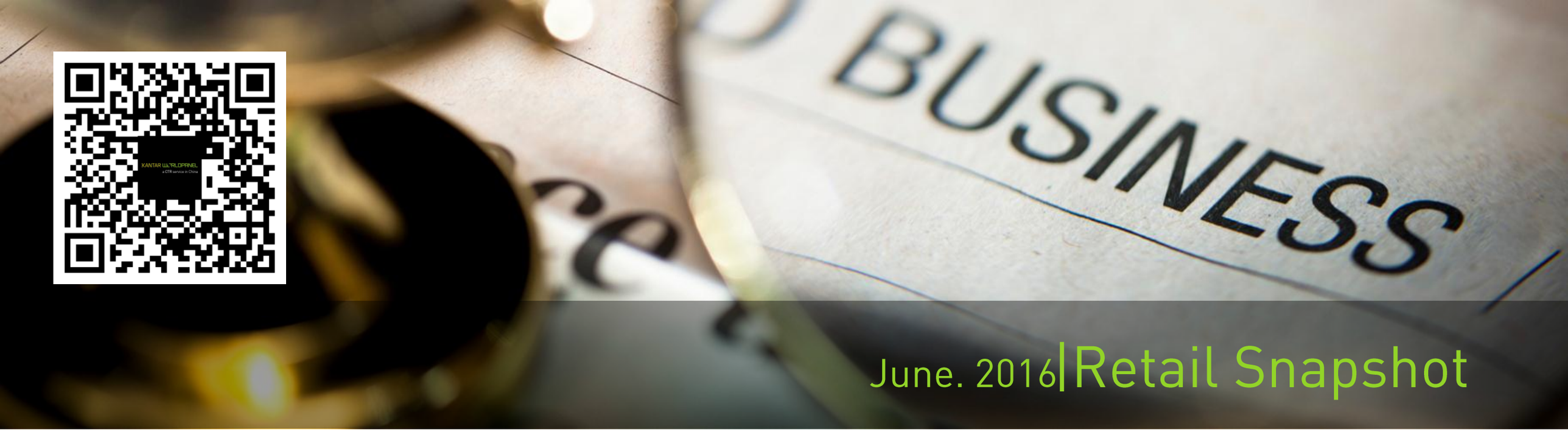
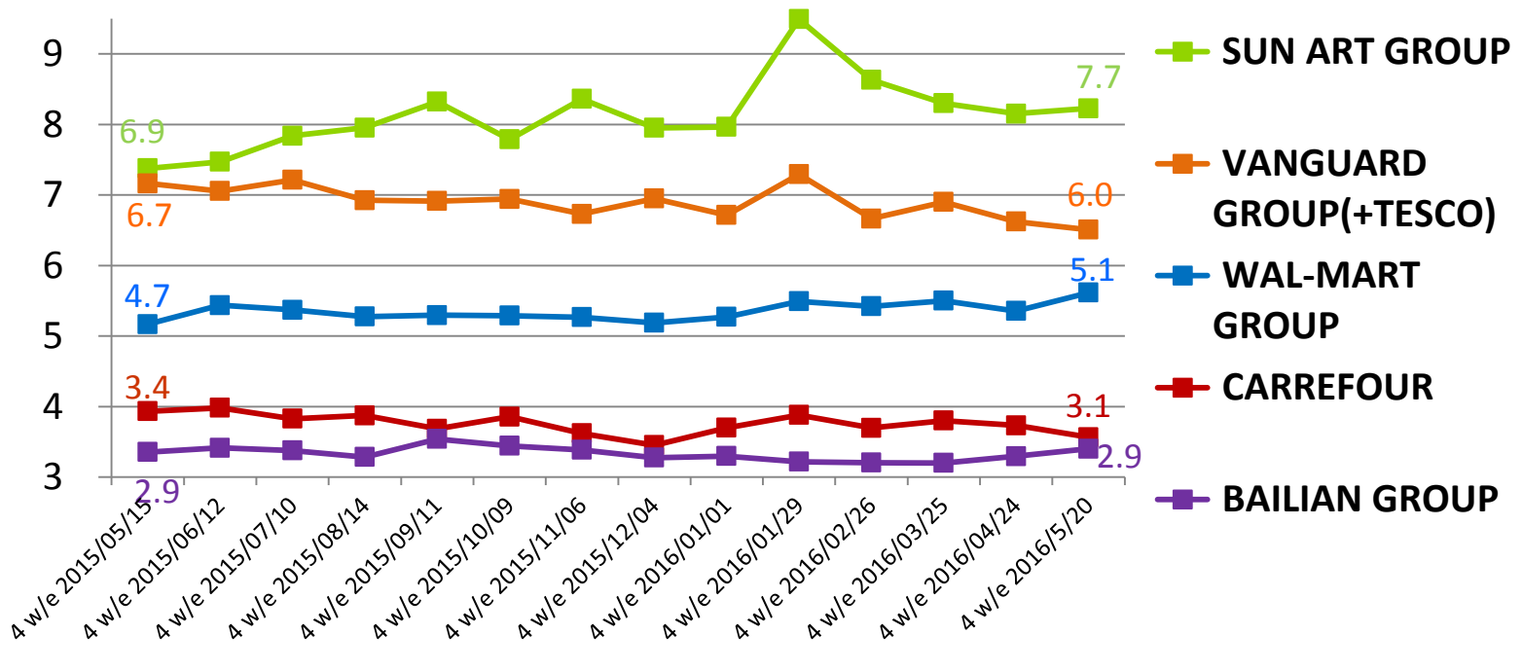


June. 2016 | Retail Snapshot

4 week share tracking of top 5 retail groups

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



Wal-Mart has kept steady growth in 2016, with their share reaching 5.1% in latest month.

Note: retailer basket declining mainly du
happening in different month, for examp
peak was captured mainly in March, whi
peak was captured mainly in February.

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

12 w/e P5 2016 vs 12w/e P5 2015: Penetration vs Trip Spend vs Frequency – National China D+

	More Shoppers?		Higher Value Baskets?		More Trips?	
大潤發 RT-MART / Auchan	17.5%	+1.9%	96.7 RMB	-4.4%	4.3 trips	+3.4%
Vanguard 华润万家 / 乐购	14.4%	-7.6%	90.0 RMB	-3.8%	4.4 trips	-1.2%
Walmart 中国	13.5%	-3.3%	98.0 RMB	+0.1%	3.5 trips	+1.6%
Carrefour	9.4%	-11.3%	96.2 RMB	-3.3%	3.3 trips	+2.2%
百联集团 BAILIAN GROUP	6.2%	-8.5%	89.4 RMB	-1.1%	4.7 trips	+2.5%

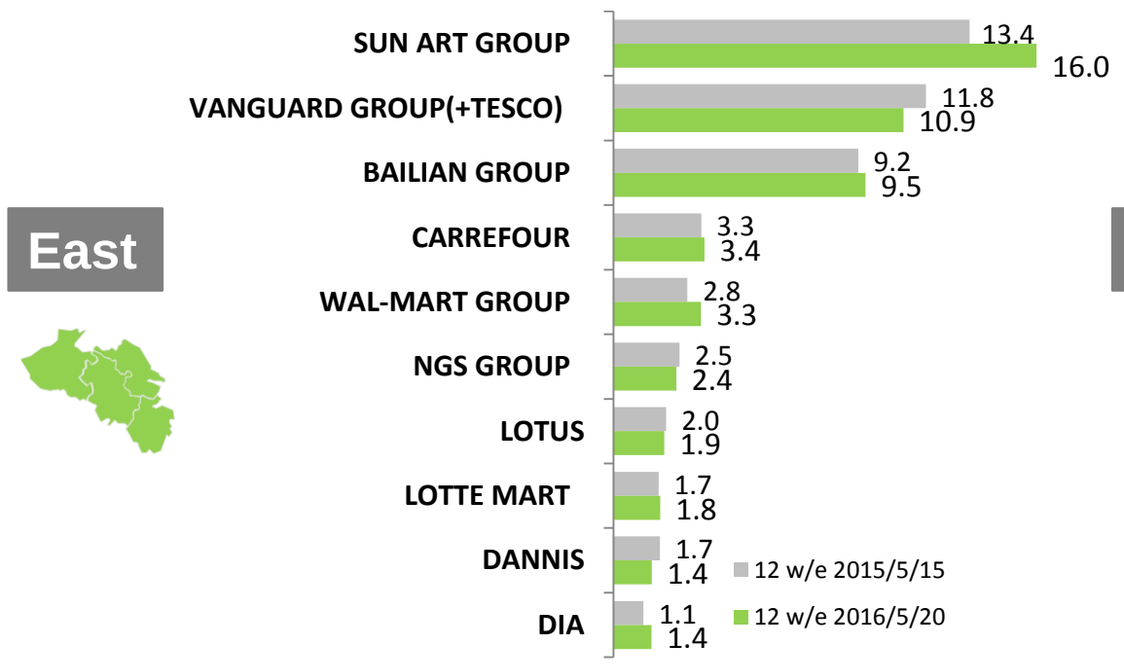
Wal-Mart is leverage on its big basket growth and more shopping trips, but is still facing problem of recruiting new shoppers.

Vanguard is losing shoppers and seeing shrinking baskets, but still has further potential to grow trip spending, considering the current basket size.

Sun-Art further strengthed its leading position in East. Wal-Mart and Yonghui are leading the West growth.

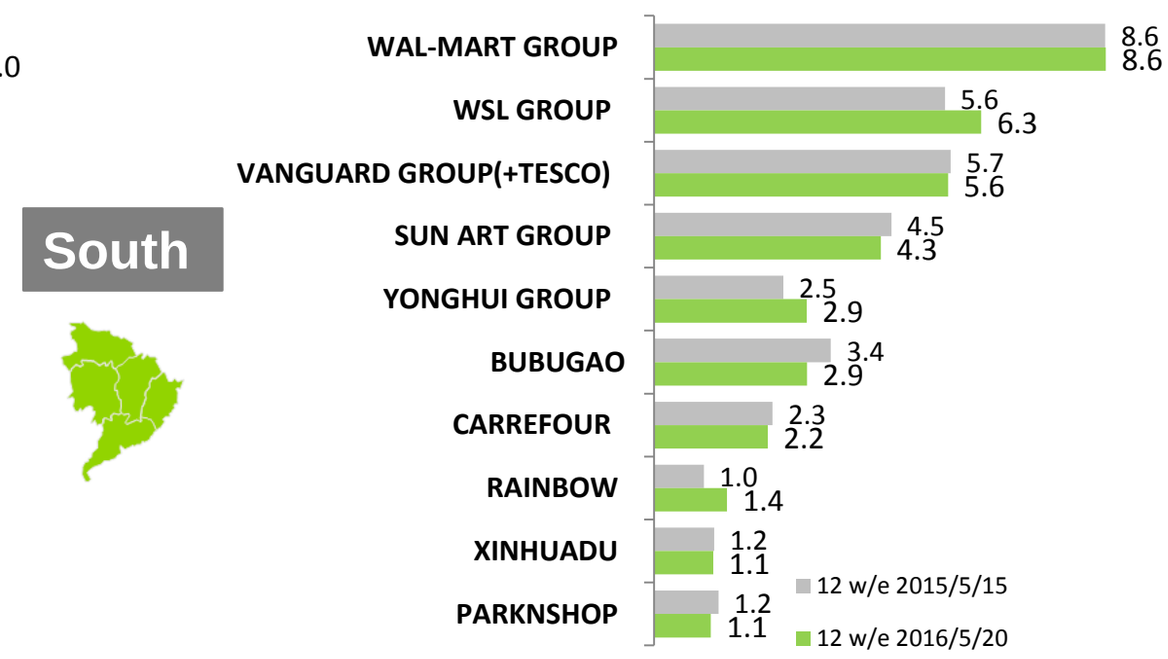
Retail Share by Top 10: East

Value Share (%) – East



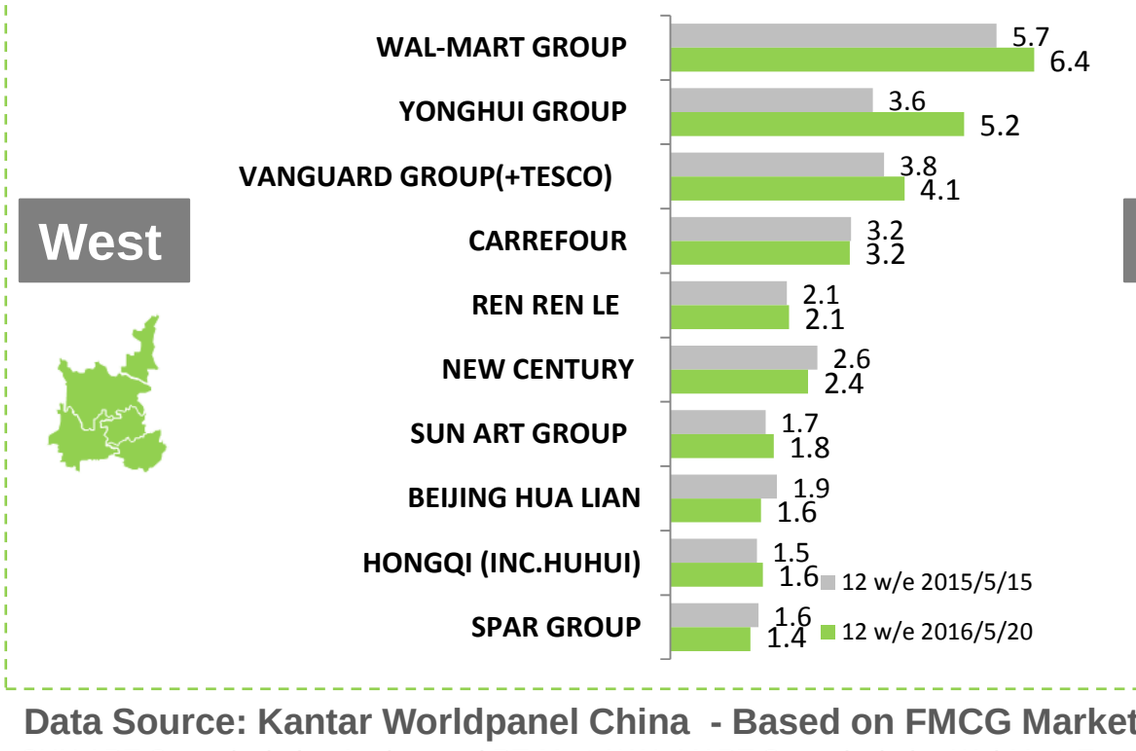
Retail Share by Top 10: South

Value Share (%) – South



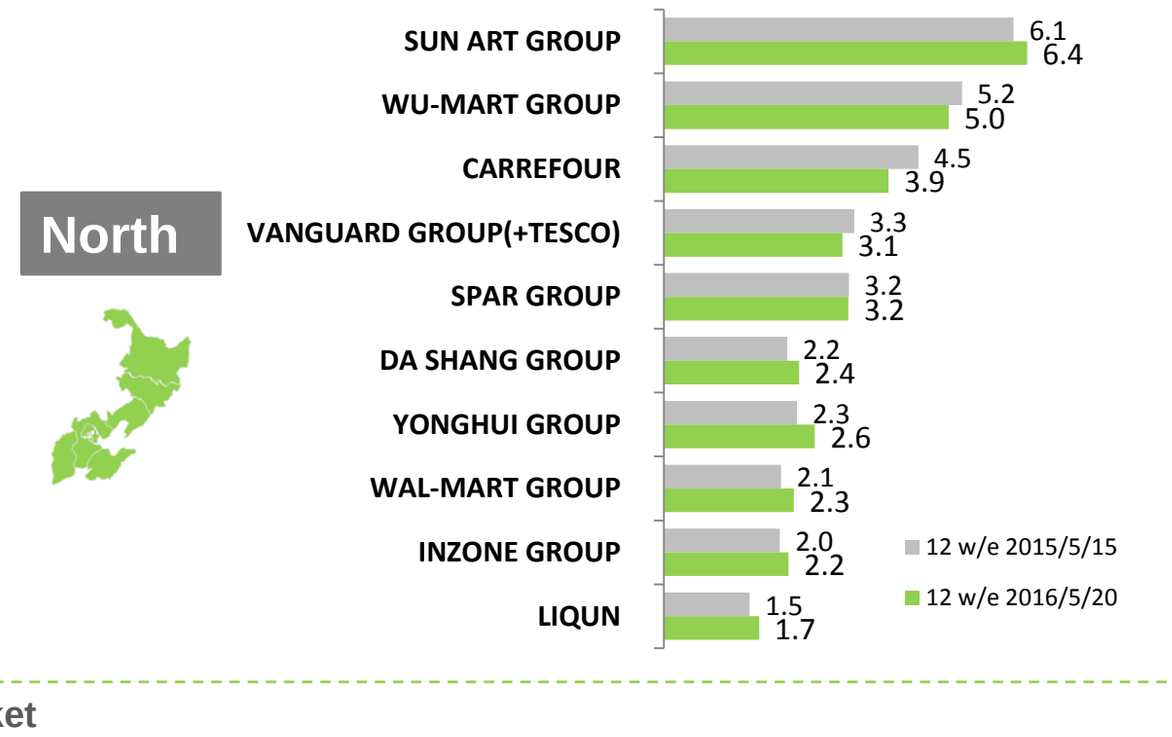
Retail Share by Top 10: West

Value Share (%) – West



Retail Share by Top 10: North

Value Share (%) – North



Data Source: Kantar Worldpanel China - Based on FMCG Market

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.

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