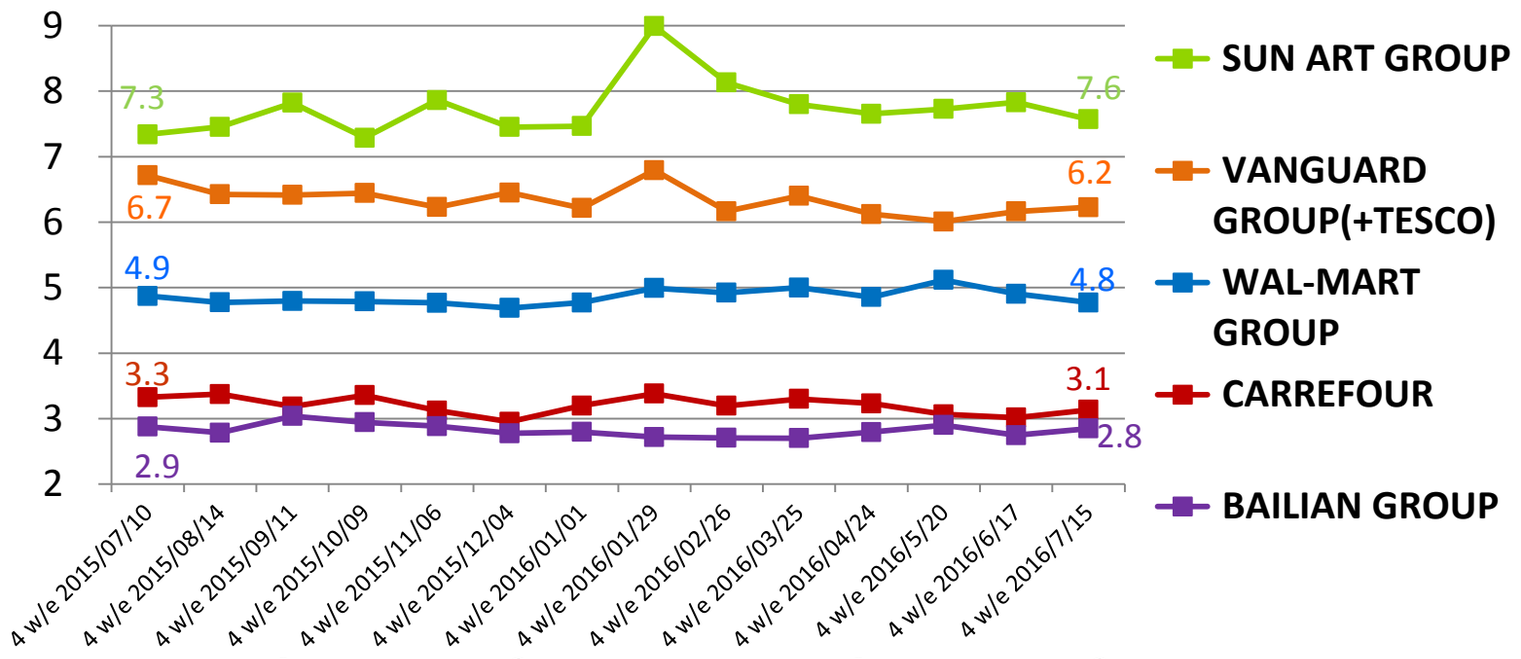
Aug. 2016 | Retail Snapshot

4 week share tracking of top 5 retail groups

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



Sun-Art Group slows down compared to the beginning of 2016; Bailian Group still struggling to hold its ranking in the top 5.

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

12 w/e P7 2016 vs 12w/e P7 2015: Penetration vs Trip Spend vs Frequency – National China D+

	More Shoppers?		Higher Value Baskets?		More Trips?	
大潤發 RT-MART / Auchan	17.3%	+1.2%	96.0 RMB	+3.2%	4.2 trips	+1.5%
Vanguard 华润万家 / 乐购	14.3%	-6.5%	88.1 RMB	-0.3%	4.4 trips	-4.0%
Walmart 中国	13.4%	-4.3%	97.0 RMB	+4.4%	3.5 trips	+0.9%
Carrefour	9.2%	-9.8%	93.5 RMB	+1.5%	3.3 trips	-2.2%
百联集团 BAILIAN GROUP	6.2%	-7.5%	88.5 RMB	+4.0%	4.7 trips	+0.3%

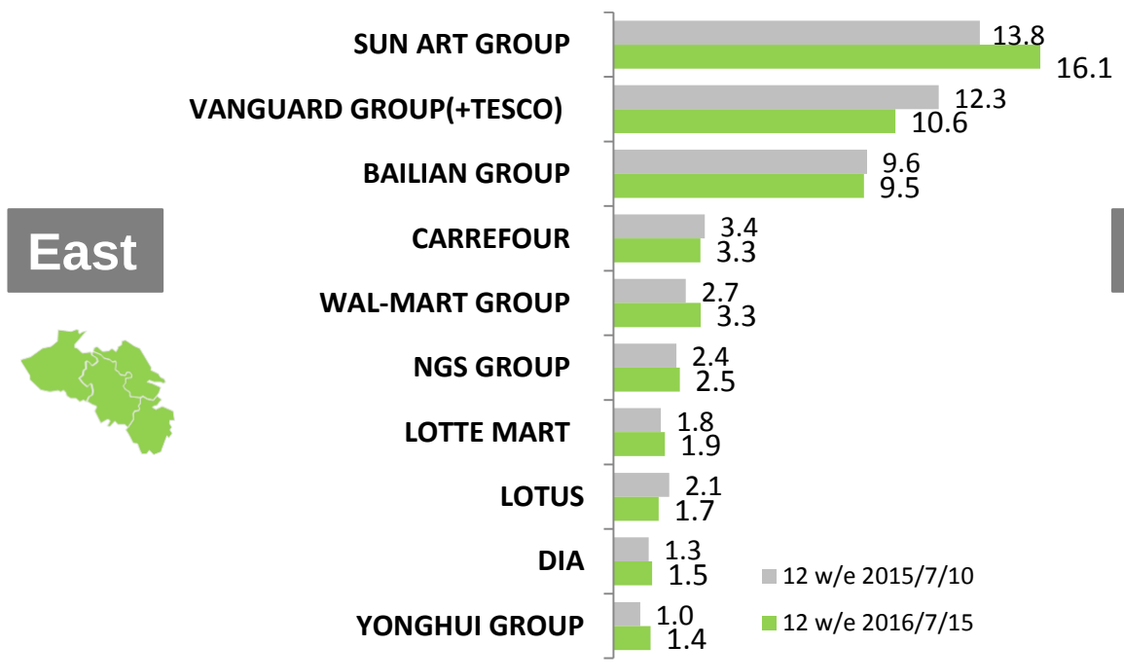
Sun-Art is the only group among the top 5 who managed to grow penetration over the last 12 weeks

Wal-Mart's stable performance this year is mainly driven by its growing basket spending but it is still suffering from a declining shopper base

Yonghui rapidly catching up to Dia in the East; WSL group seeing strong share growth in the South.

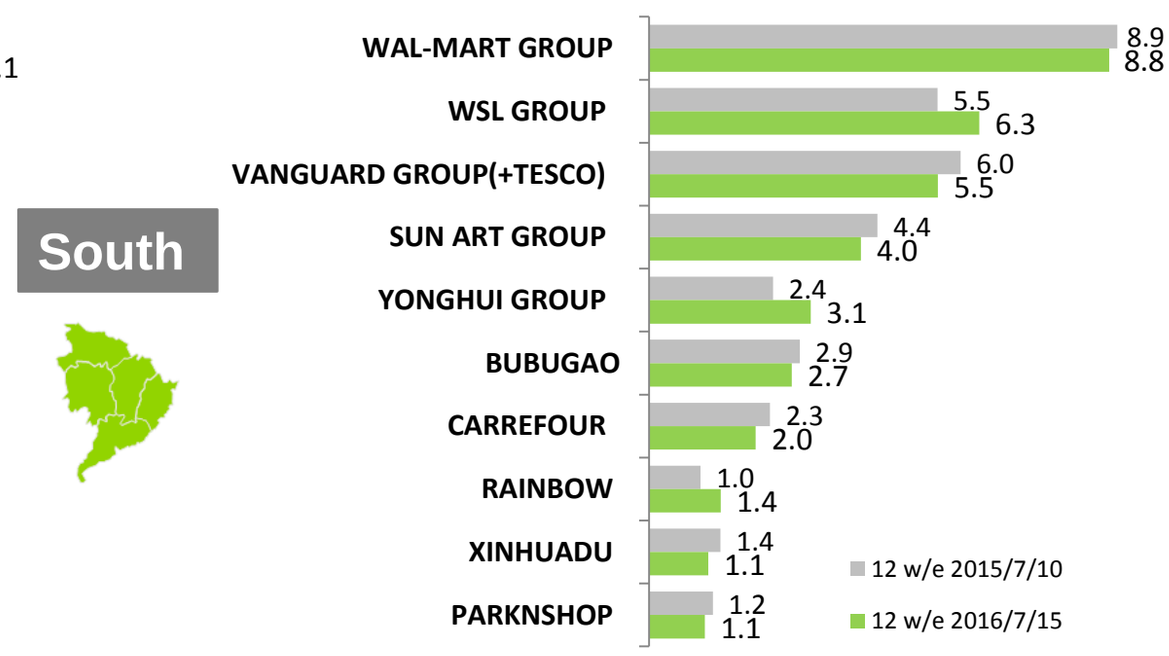
Retail Share by Top 10: East

Value Share (%) – East



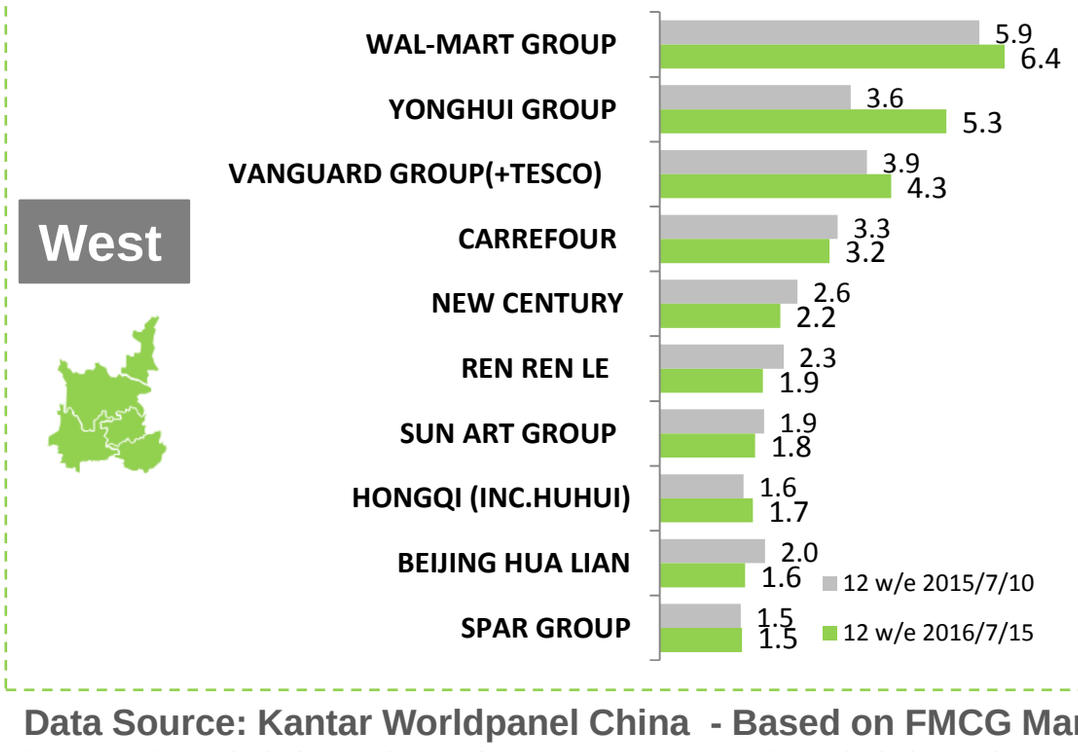
Retail Share by Top 10: South

Value Share (%) – South



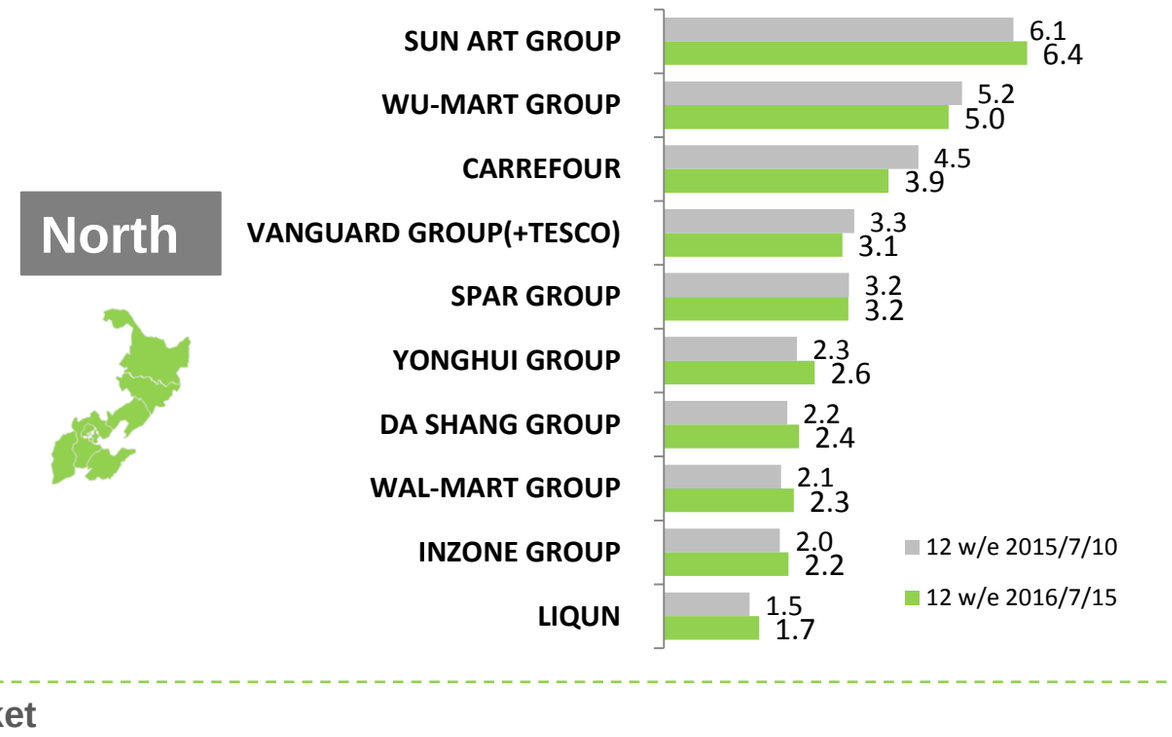
Retail Share by Top 10: West

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.

© Kantar Worldpanel