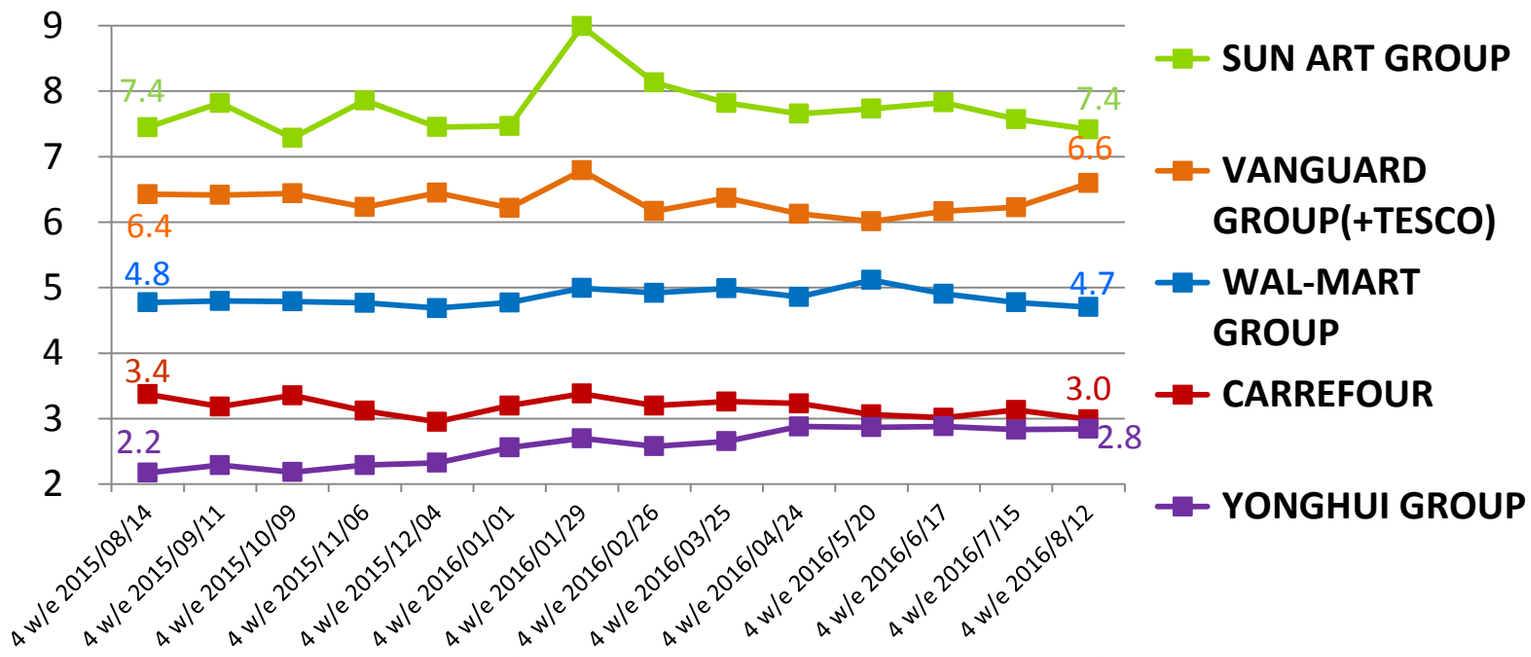
Sep. 2016 |Retail Snapshot

4 week share tracking of top 5 retail groups

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



Yonghui kept rapid growth since the beginning of 2016, soon to challenge Carrefour's 4th position.

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

12 w/e 2016/08/12 vs 12w/e 2015/08/14: Penetration vs Trip Spend vs Frequency – National China D+

	More Shoppers?		Higher Value Baskets?		More Trips?	
大潤發 RT-MART / Auchan	17.5%	+1.2%	93.6 RMB	+1.6%	4.2 trips	-0.3%
Vanguard 华润万家 / 乐购	14.2%	-6.1%	89.3 RMB	+2.5%	4.5 trips	-2.0%
Walmart 中国	13.1%	-6.1%	95.7 RMB	+3.5%	3.4 trips	-0.8%
Carrefour	9.0%	-11.4%	92.9 RMB	+2.2%	3.3 trips	-3.1%
永辉超市 YONGHUI SUPERSTORES	7.5%	+15.9%	78.0 RMB	+8.3%	4.4 trips	+1.8%

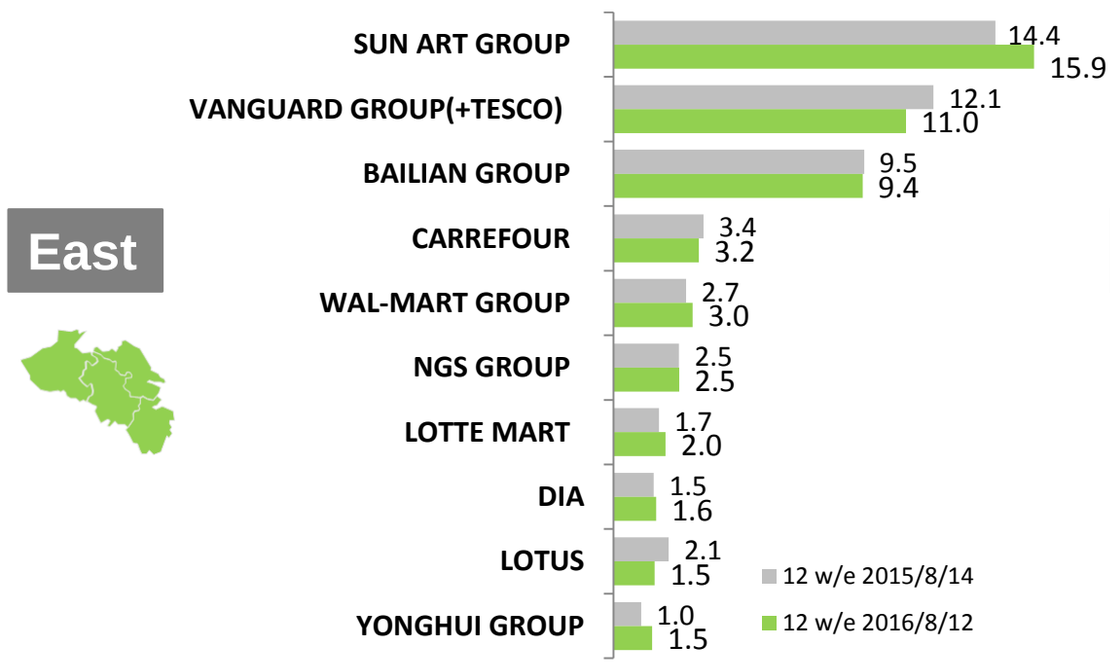
Sun-Art slowed down after a share increase during Chinese new year period mainly due to shoppers shopping less frequently and basket size growing slower than competitors.

Yonghui's growth has been boosted by its fast store expansion plan which has driven penetration growth. Basket size has also grown very fast and there is still big potential to further drive their trip spending.

Sun-Art facing challenges in the South and West; Yonghui gaining share in all regions.

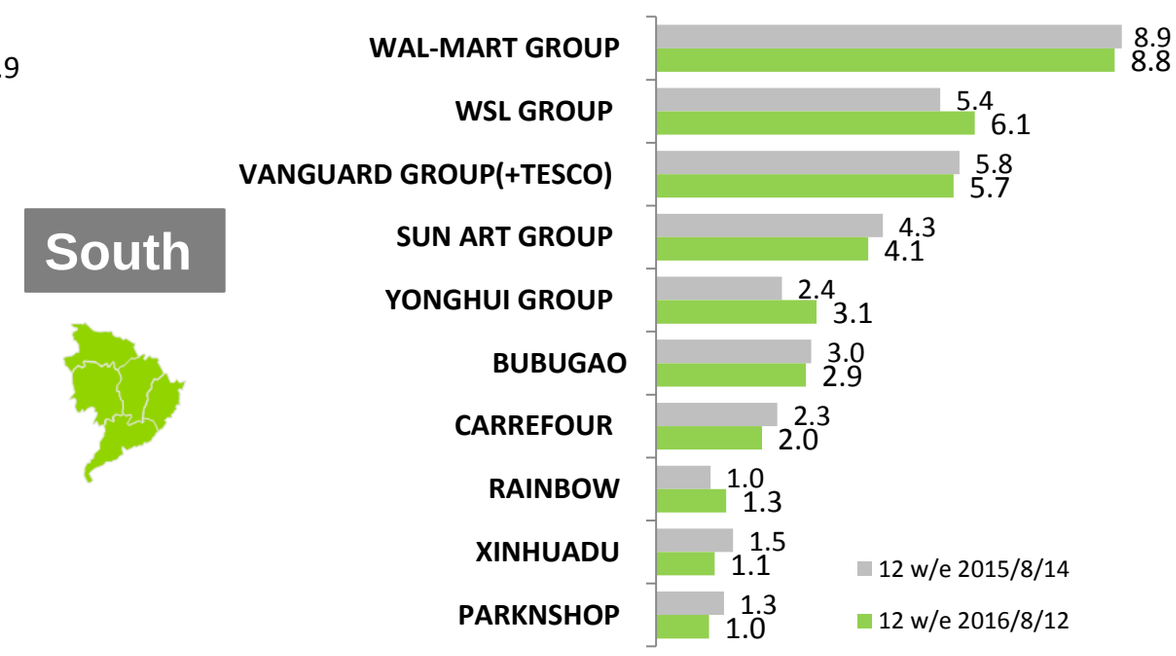
Retail Share by Top 10: East

Value Share (%) – East



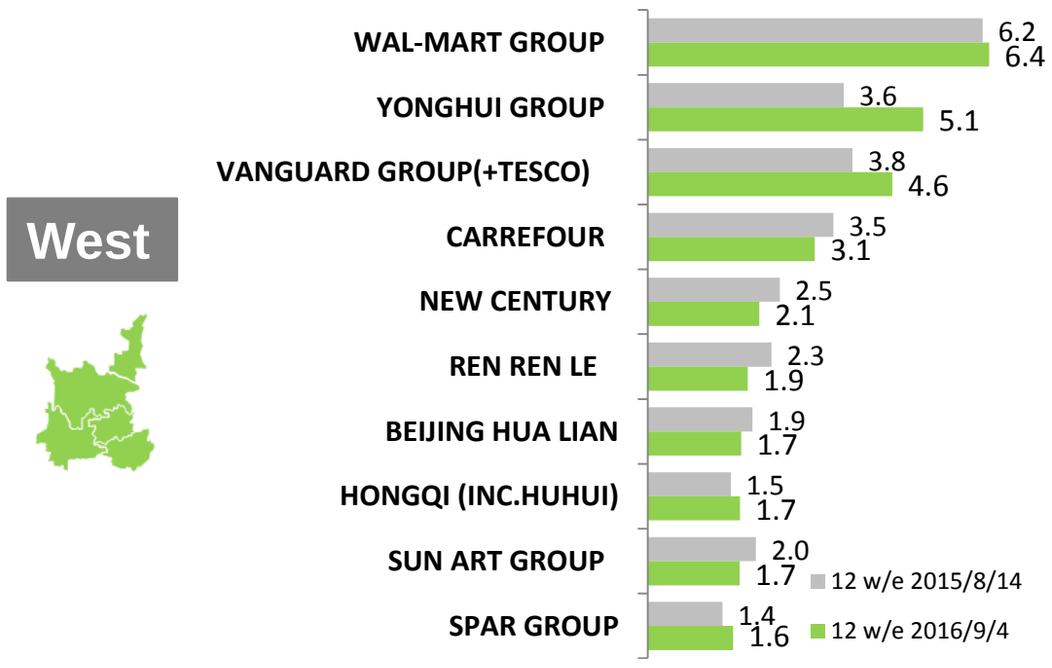
Retail Share by Top 10: South

Value Share (%) – South



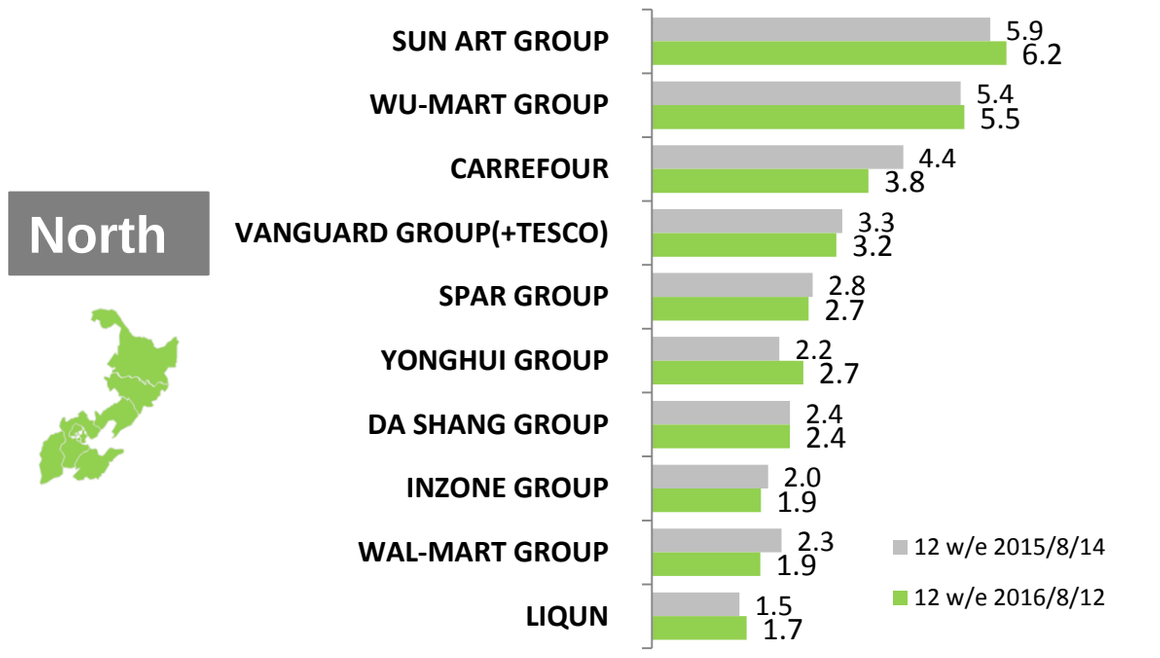
Retail Share by Top 10: West

Value Share (%) – West



Retail Share by Top 10: North

Value Share (%) – North



Data Source: Kantar Worldpanel China - Based on Modern Trade of FMCG Market (Super+Hyper+CVS)

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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