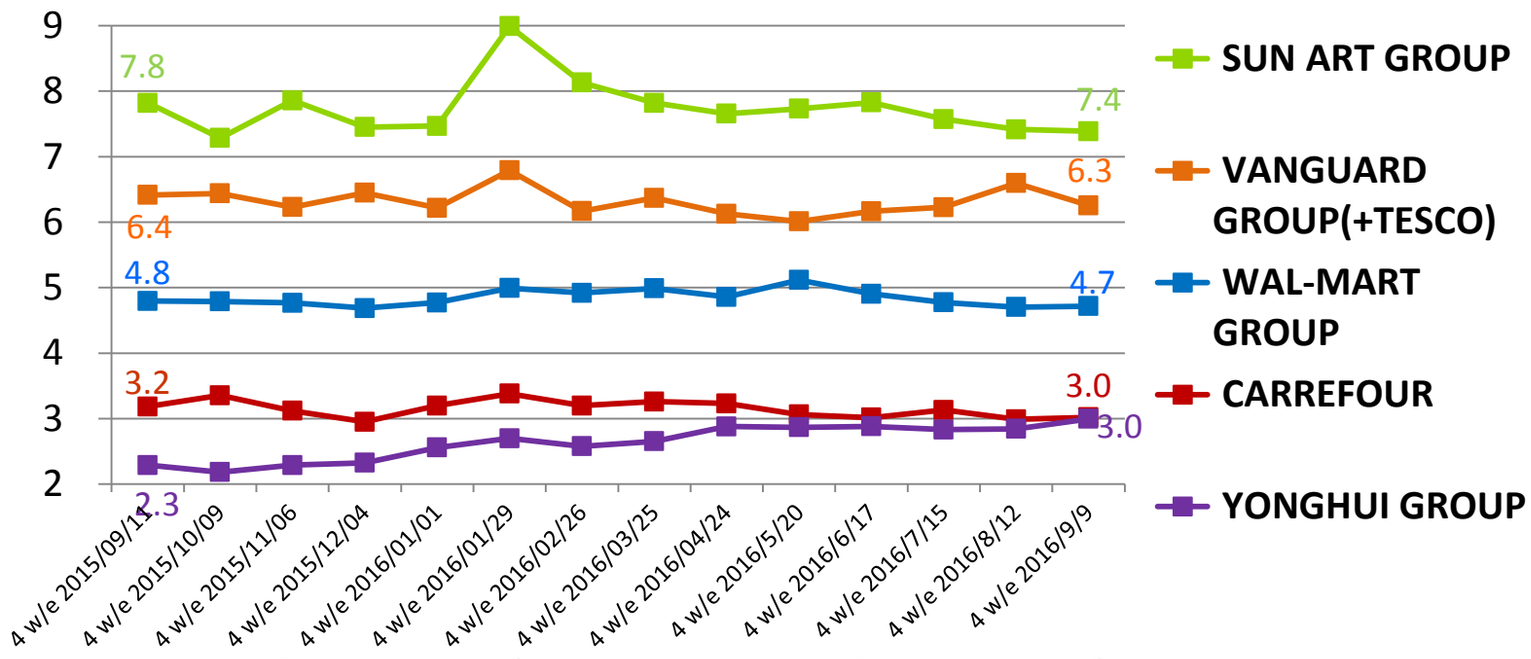
Oct. 2016 |Retail Snapshot

4 week share tracking of top 5 retail groups

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



Sun-Art group seeing 3rd consecutive period without share growth while Yonghui closed its gap with Carrefour in last 4 weeks

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

12 w/e P9 2016 vs 12w/e P9 2015: Penetration vs Trip Spend vs Frequency – National China D+

	More Shoppers?		Higher Value Baskets?		More Trips?	
大潤發 RT-MART / Auchan	17.4%	-0.9%	91.5 RMB	-1.1%	4.2 trips	-0.5%
Vanguard 华润万家 / 乐购	14.3%	-5.2%	89.0 RMB	+2.5%	4.5 trips	-1.1%
Walmart 中国	13.2%	-5.1%	95.4 RMB	+4.0%	3.4 trips	-2.0%
Carrefour	9.0%	-12.3%	93.8 RMB	+4.2%	3.3 trips	-0.4%
永辉超市 YONGHUI SUPERSTORES	7.6%	+16.9%	77.7 RMB	+7.9%	4.4 trips	+2.6%

Sun-Art saw penetration decline for the first time in past 2 years. Trip spending also declined for the latest quarter.

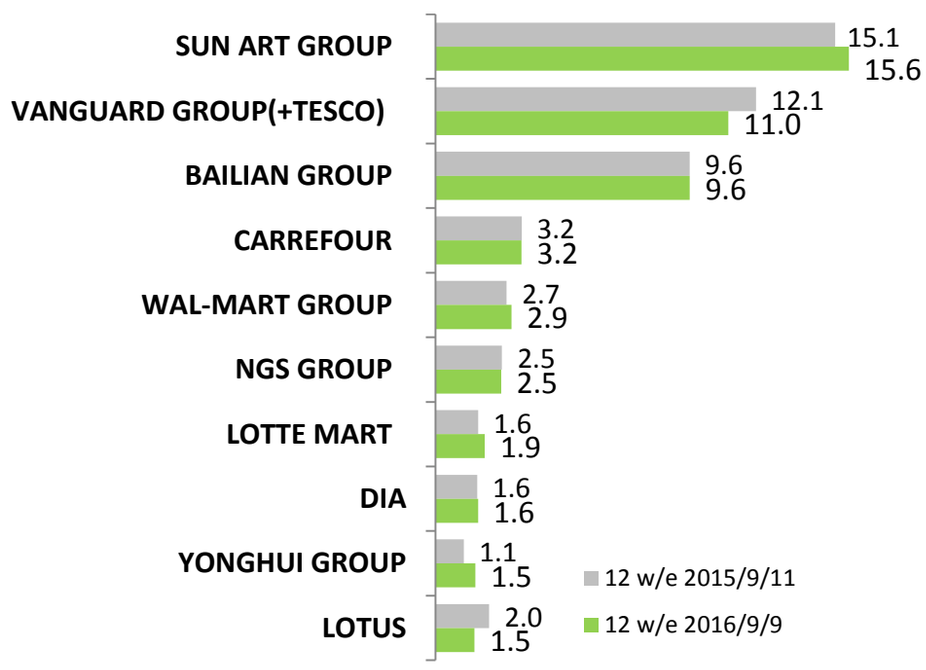
Yonghui's sees the fastest growth in spending as well as driving more trips.

Yonghui growing rapidly in the West region, Sun-Art is losing share heavily in the South.

Retail Share by Top 10: East

Value Share (%) – East

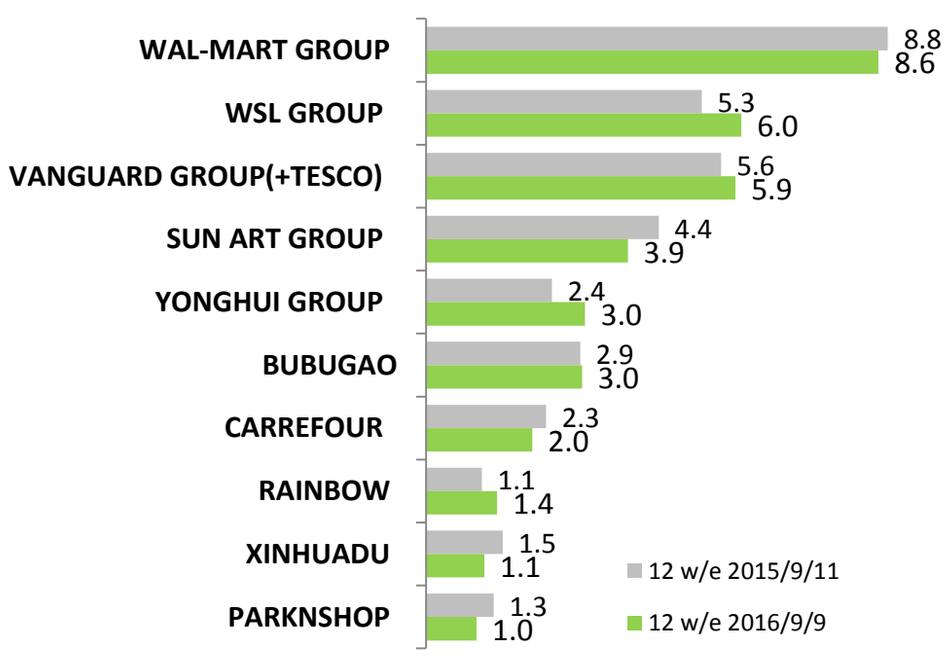
East



Retail Share by Top 10: South

Value Share (%) – South

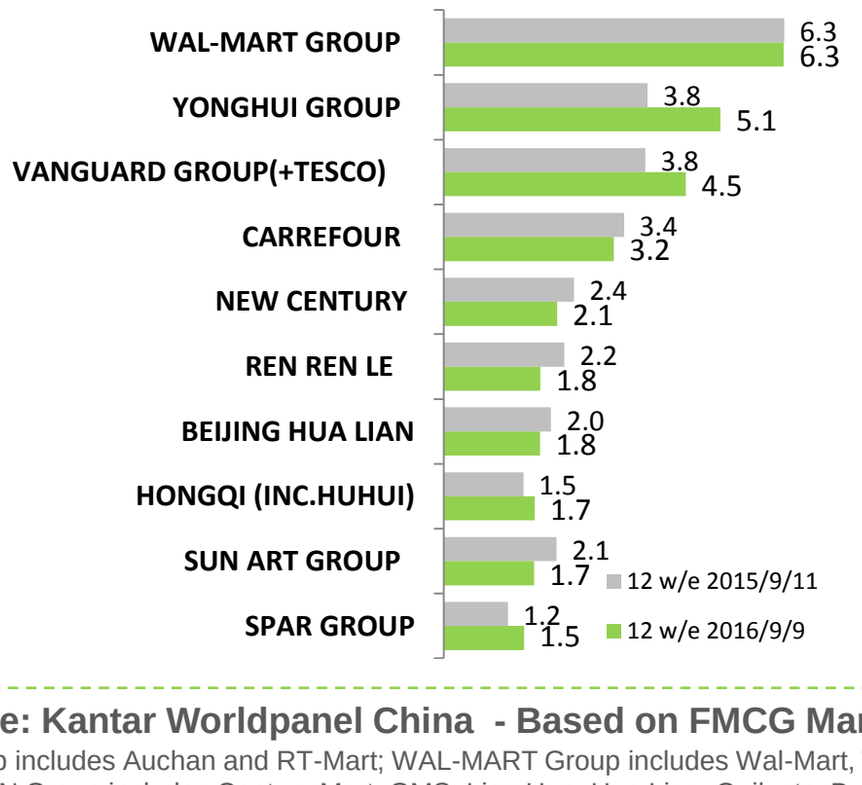
South



Retail Share by Top 10: West

Value Share (%) – West

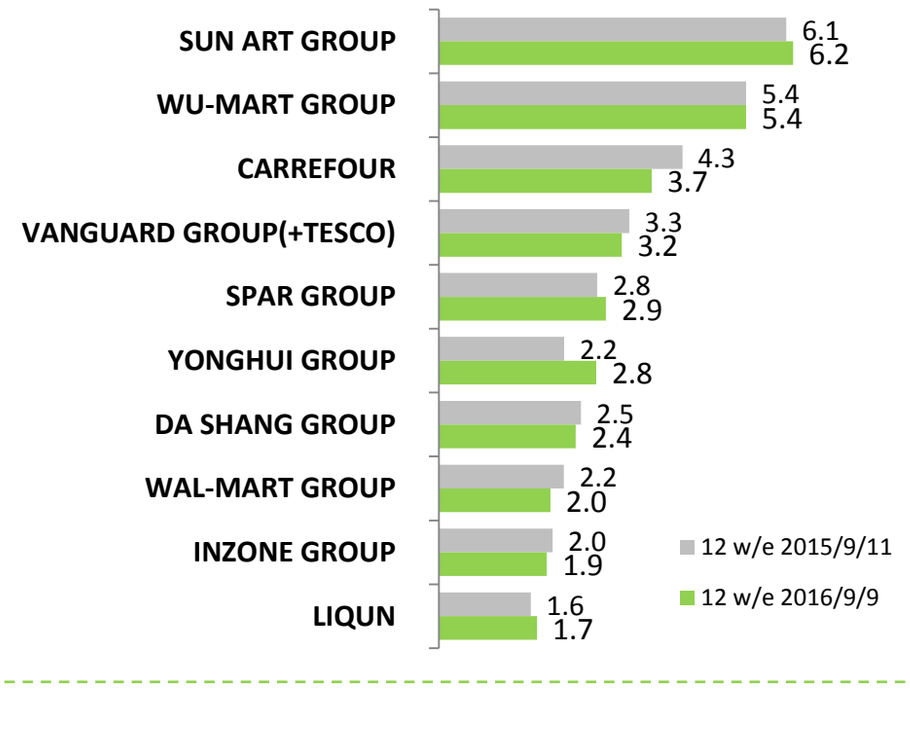
West



Retail Share by Top 10: North

Value Share (%) – North

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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