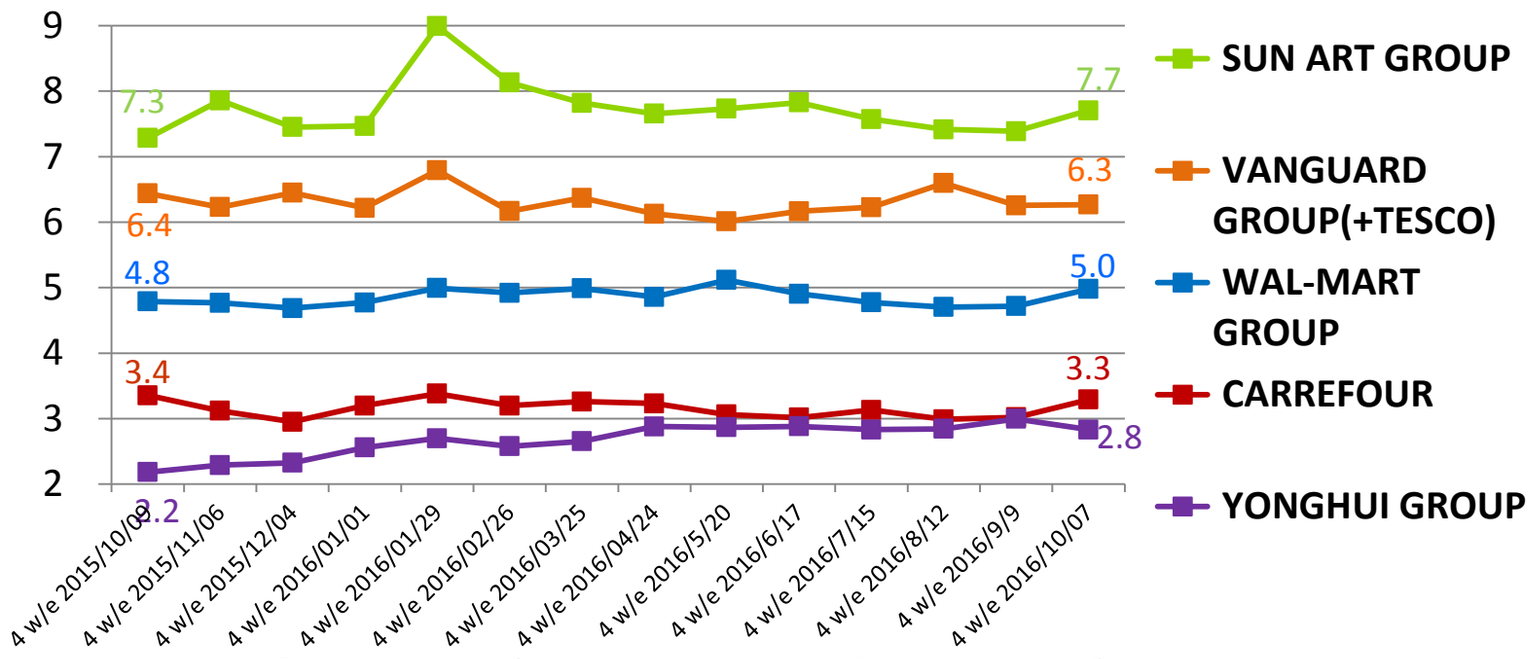
Nov. 2016 |Retail Snapshot

4 week share tracking of top 5 retail groups

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



Sun-Art and Wal-Mart's share slightly improved this month while Yonghui is hovering between 2.8 and 3.0 since April.

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

12 w/e P10 2016 vs 12w/e P10 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%	-1.2%	94.5 RMB	-1.4%	4.2 trips	+0.1%
Vanguard 华润万家 / 乐购	14.3%	-5.0%	91.8 RMB	+2.3%	4.5 trips	-0.5%
Walmart 中国	13.2%	-5.4%	99.1 RMB	+4.1%	3.4 trips	-0.6%
Carrefour	9.0%	-11.1%	98.8 RMB	+3.0%	3.2 trips	0.0%
永辉超市 YONGHUI SUPERSTORES	7.8%	+17.2%	80.5 RMB	+9.3%	4.3 trips	-0.6%

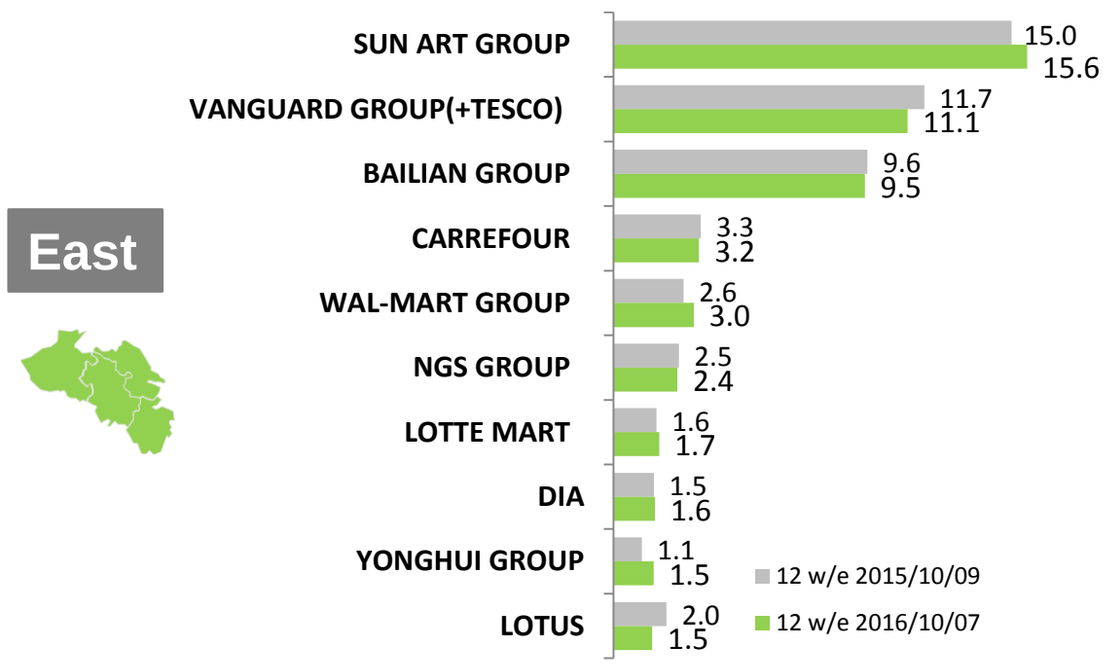
Yonghui now is the only retailer who is still growing its shopper base, benefiting from its aggressive new store opening plan, during a time where physical store growth is difficult.

Trip Spending for Wal-Mart and Carrefour is higher than others, while Yonghui wins the fastest growth.

Sun-Art further strengthened its leading position in the East, but seeing share losses in the South and West.

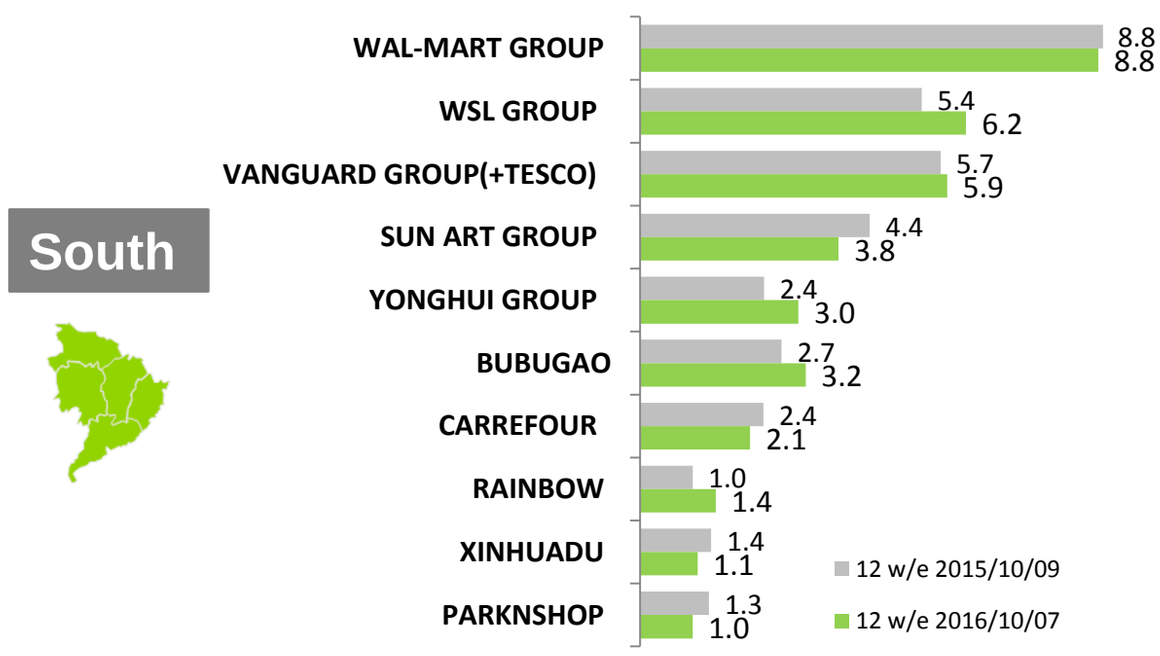
Retail Share by Top 10: East

Value Share (%) – East



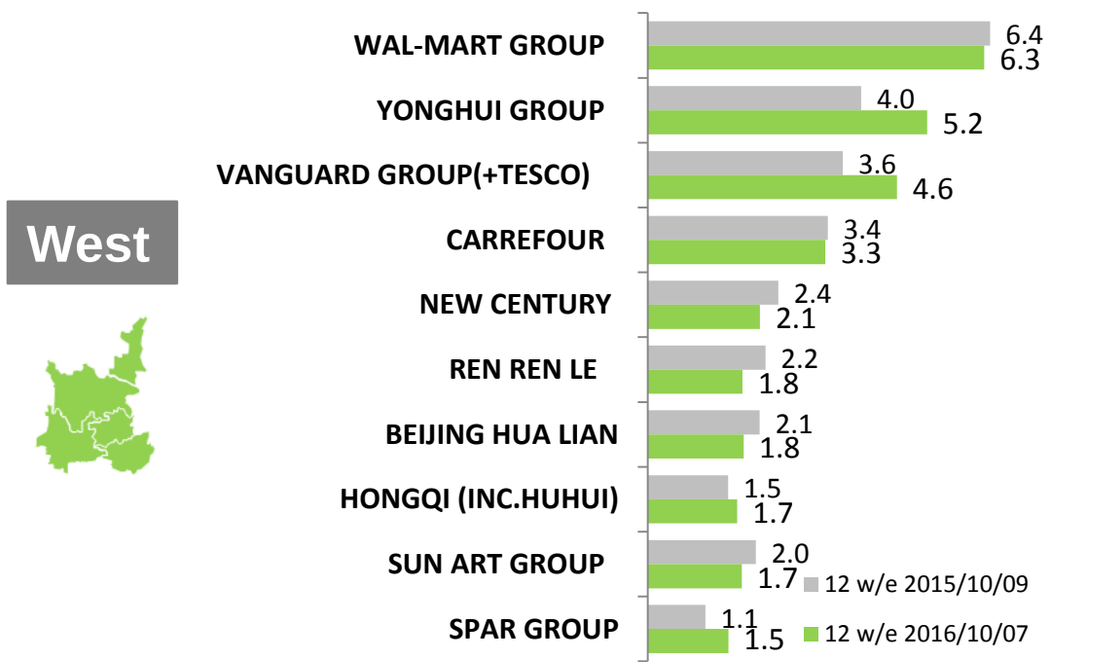
Retail Share by Top 10: South

Value Share (%) – South



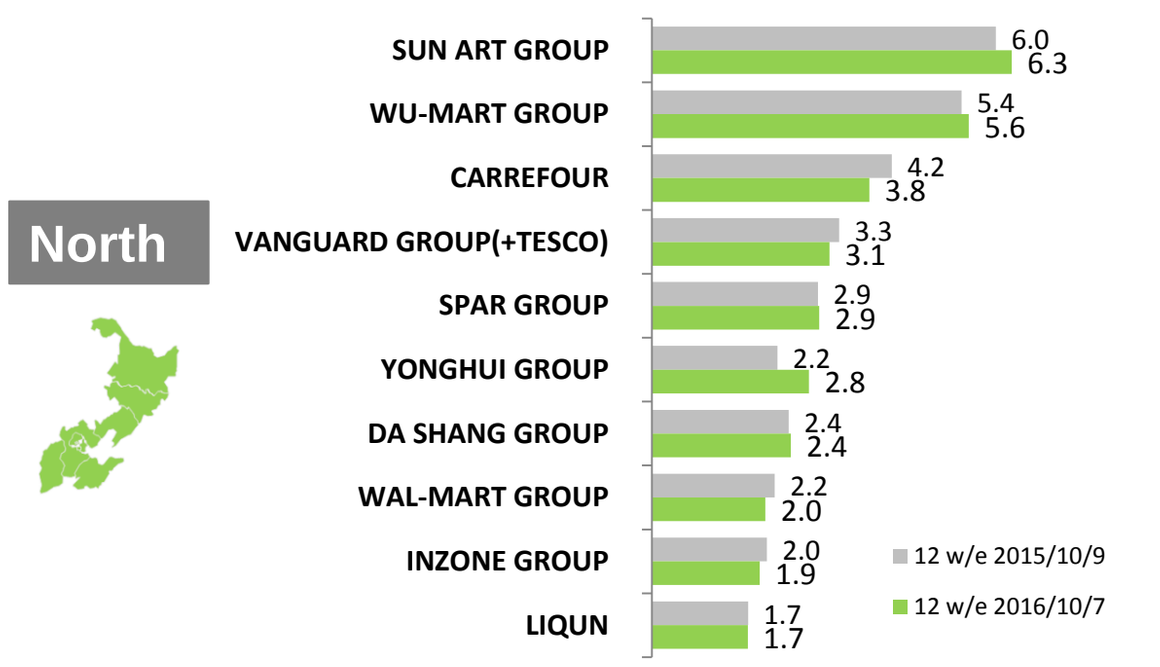
Retail Share by Top 10: West

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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