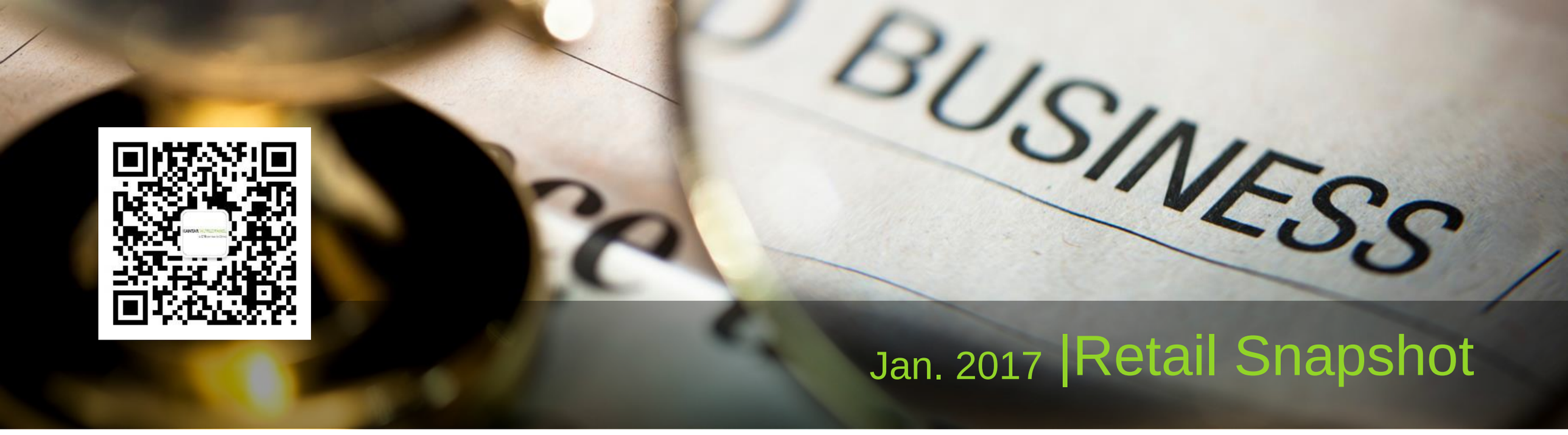
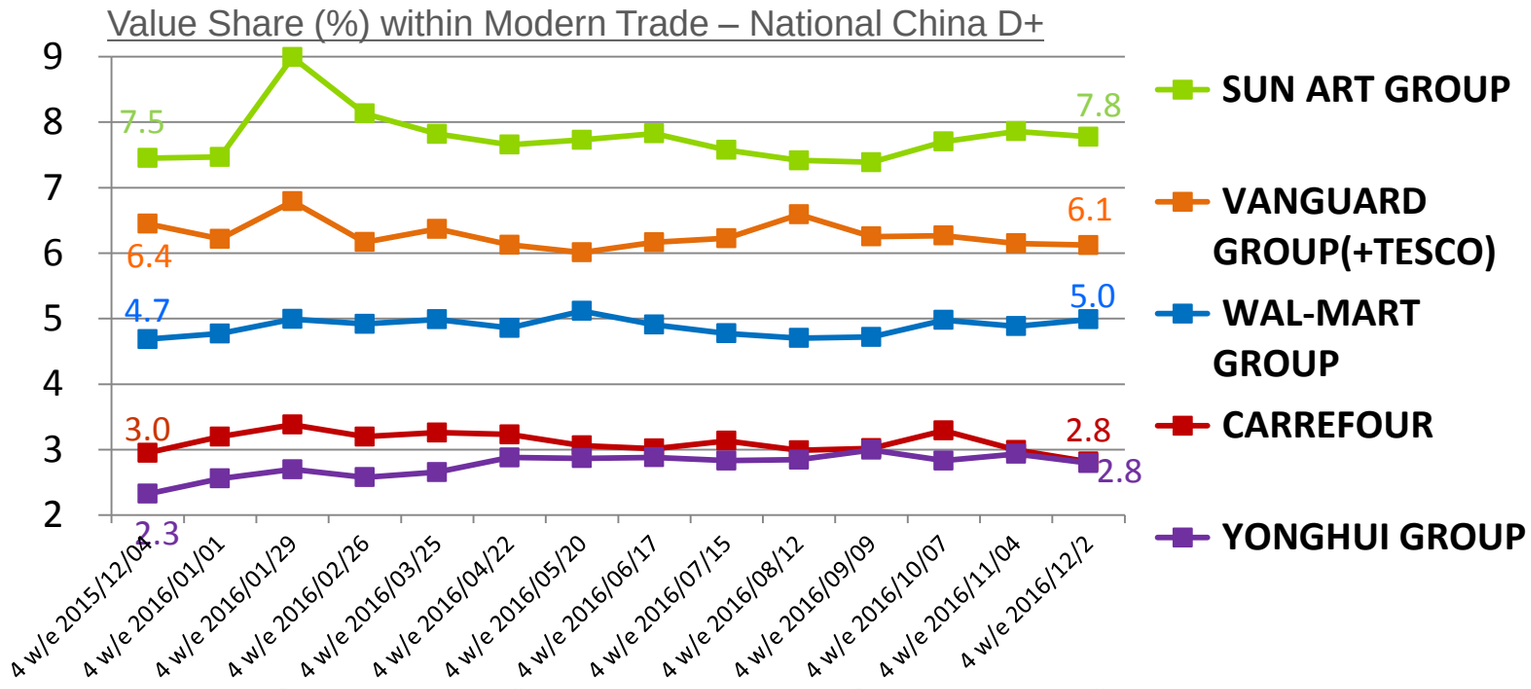


Jan. 2017 |Retail Snapshot

4 week share tracking of top 5 retail groups

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



Top 5 retailers had a relatively stable month except for Carrefour who's share dropped below 3%.

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

12 w/e P12 2016 vs 12w/e P12 2015: Penetration vs Trip Spend vs Frequency – National China D+

	More Shoppers?		Higher Value Baskets?		More Trips?	
大潤發 RT-MART / Auchan	17.2%	-2.4%	98.9 RMB	+1.7%	4.2 trips	+1.0%
Vanguard 华润万家 / 乐购	14.3%	-2.8%	90.7 RMB	-1.0%	4.4 trips	-2.3%
Walmart 中国	13.2%	-4.1%	102.8 RMB	+5.9%	3.3 trips	-0.5%
Carrefour	8.7%	-9.3%	100.2 RMB	+2.3%	3.2 trips	+0.8%
永辉超市 YONGHUI SUPERSTORES	7.7%	+14.0%	80.4 RMB	+7.3%	4.2 trips	0.0%

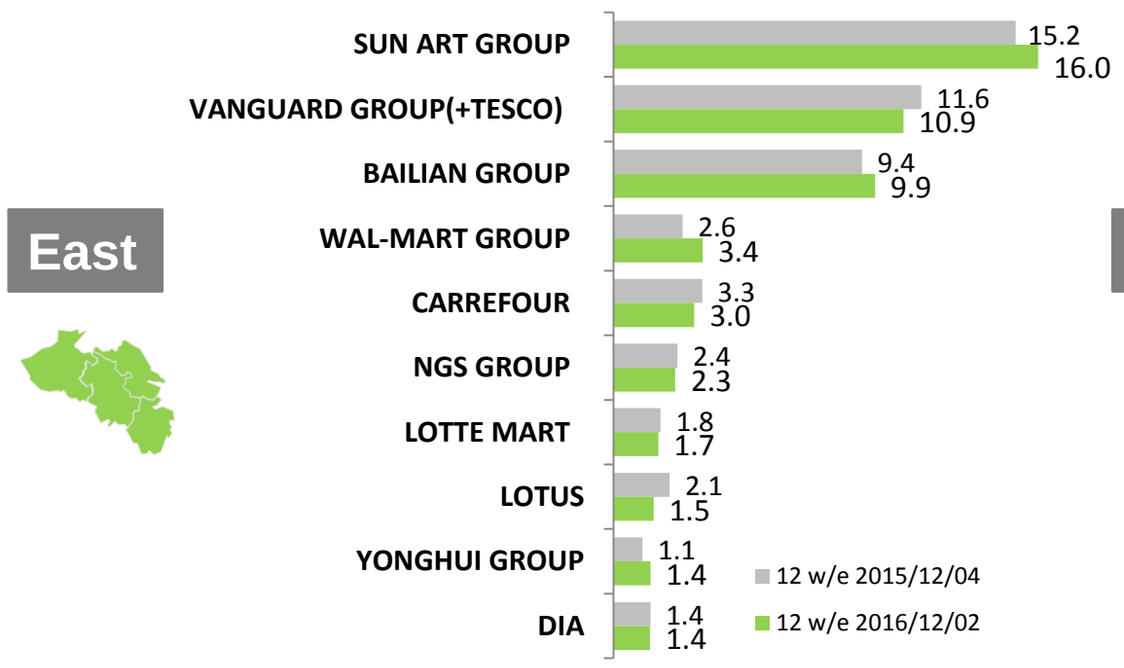
Growth in basket spending is the key driver among top retailers, especially for Wal-Mart and Carrefour.

Yonghui kept recruiting new shoppers with penetration growth being led by the West.

Yonghui narrowing gap with Wal-Mart in the West; Sun-Art strengthened its leadership in the East and the North.

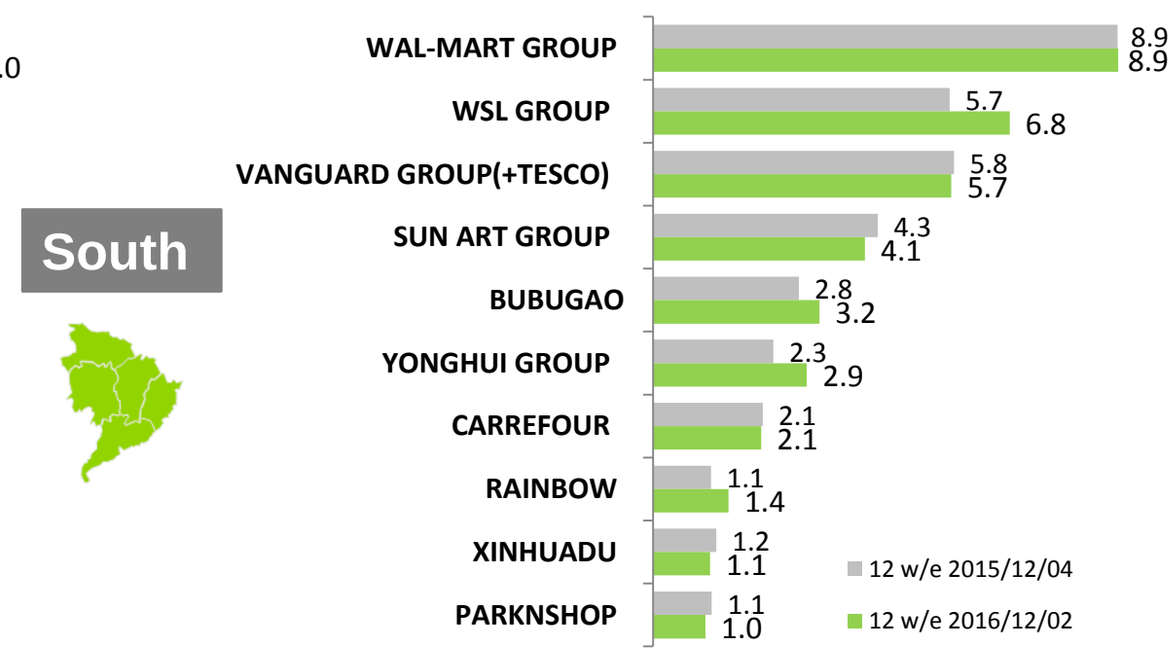
Retail Share by Top 10: East

Value Share (%) – East



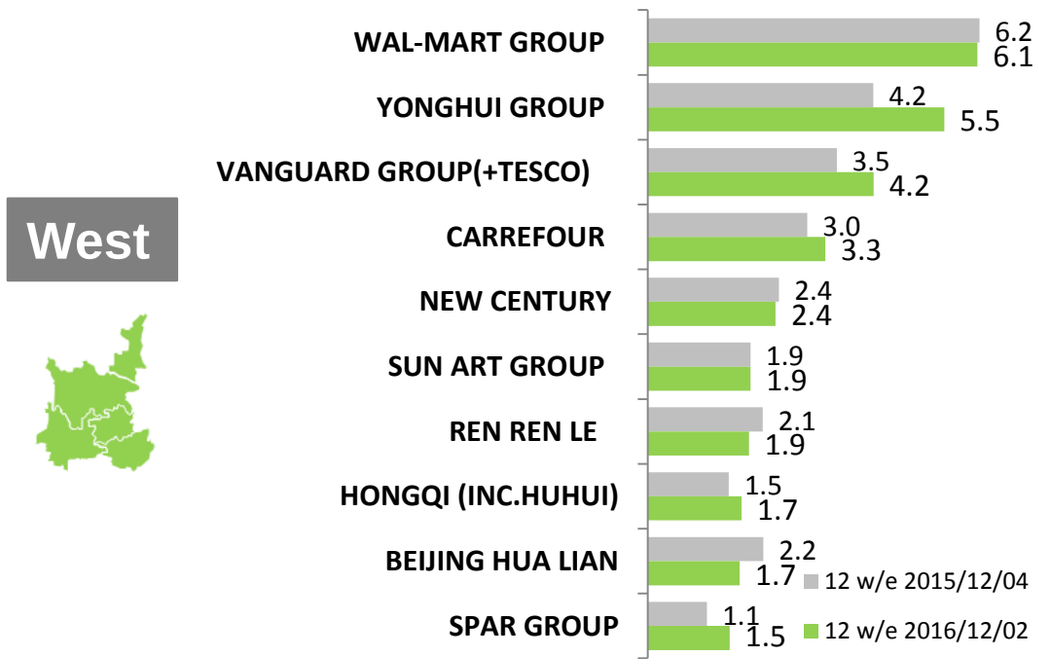
Retail Share by Top 10: South

Value Share (%) – South



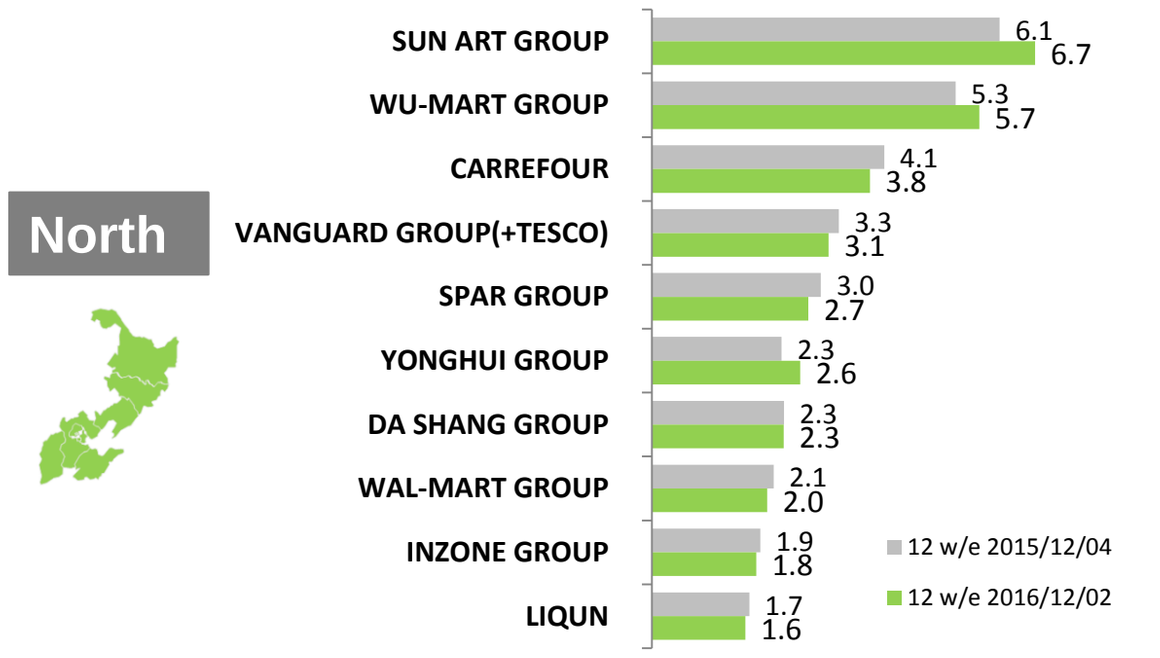
Retail Share by Top 10: West

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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