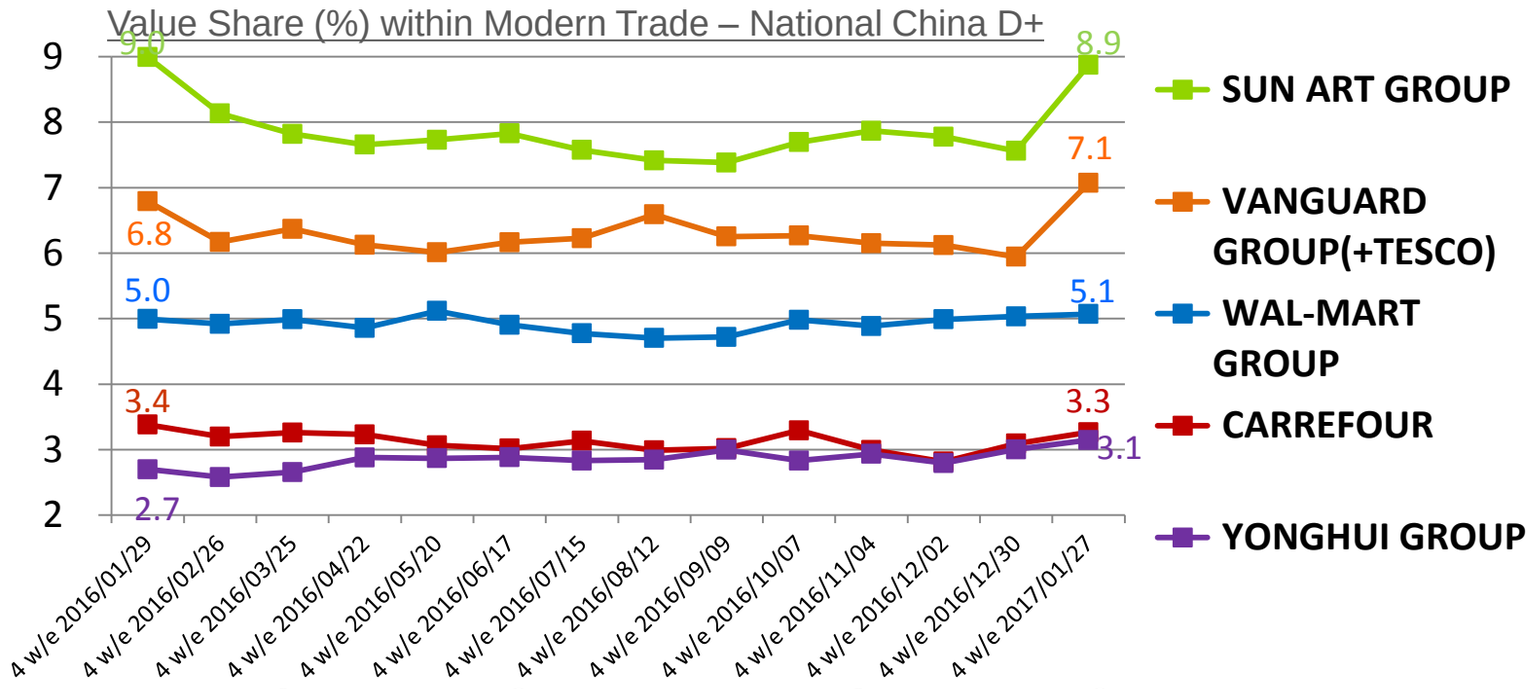
March. 2017 | Retail Snapshot

4 week share tracking of top 5 retail groups

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



All retail groups seeing an uplift during the CNY period. "Low price storm" CNY promotion helps SunArt group go peak every January.

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

12 w/e P1 2017 vs 12w/e P1 2016: Penetration vs Trip Spend vs Frequency – National China D+

	More Shoppers?		Higher Value Baskets?		More Trips?	
大潤發 RT-MART / Auchan	18.2%	-1.3%	104.4 RMB	+6.4%	4.1 trips	-0.3%
Vanguard 华润万家 / 乐购	14.7%	-1.7%	98.8 RMB	+6.0%	4.2 trips	-1.5%
Walmart 中国	13.8%	-1.9%	109.3 RMB	+12.6%	3.2 trips	-2.6%
Carrefour	9.3%	-6.8%	103.1 RMB	+7.6%	3.0 trips	-0.7%
永辉超市 YONGHUI SUPERSTORES	8.2%	+8.9%	85.1 RMB	+10.7%	4.1 trips	+1.0%

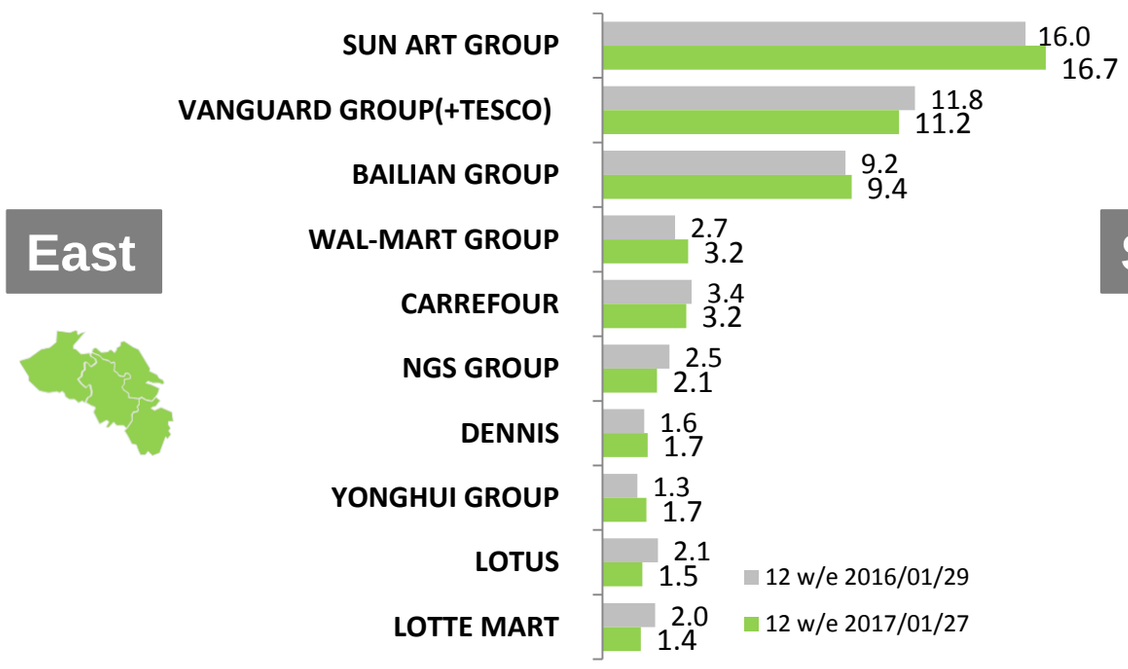
Pre-CNY peak was driven by all the top 5 giants growing basket spend. SunArt, Walmart and Carrefour's basket value exceeded 100RMB

Besides higher basket spend, Yonghui continued to expand its buyer base as well as the number of shopping trips.

Walmart achieved growth in the East, South, and West. Lotte Mart fell to rank #10 in the East.

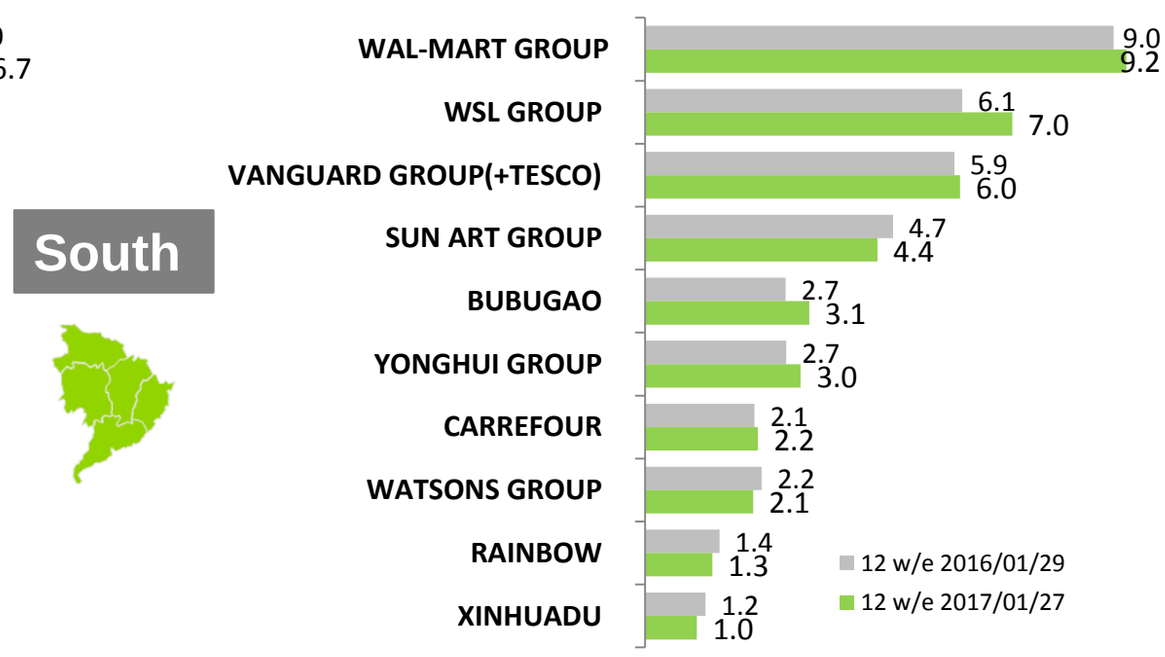
Retail Share by Top 10: East

Value Share (%) – East



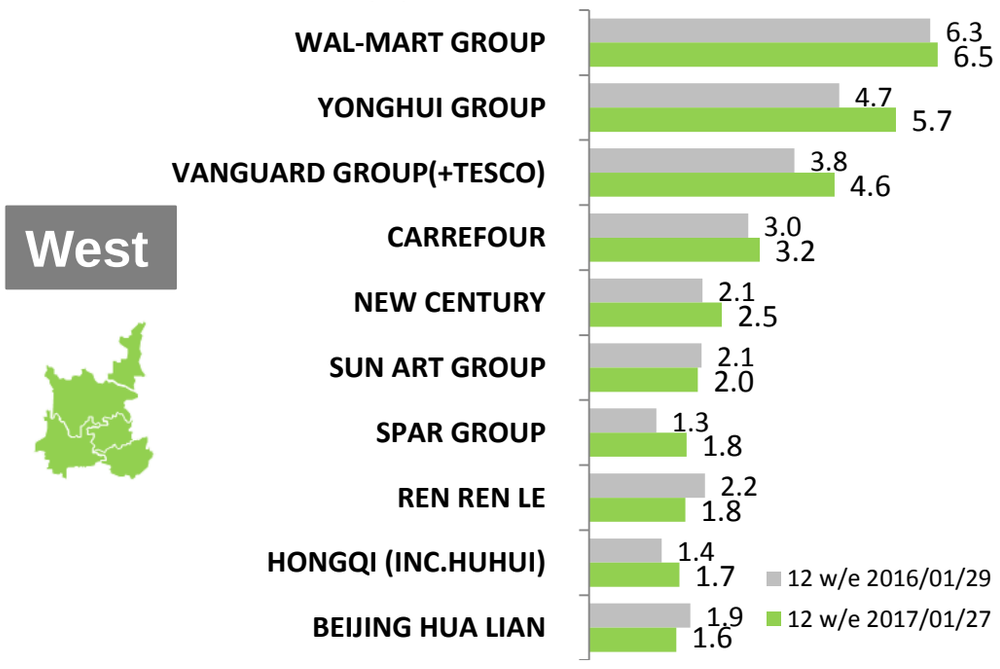
Retail Share by Top 10: South

Value Share (%) – South



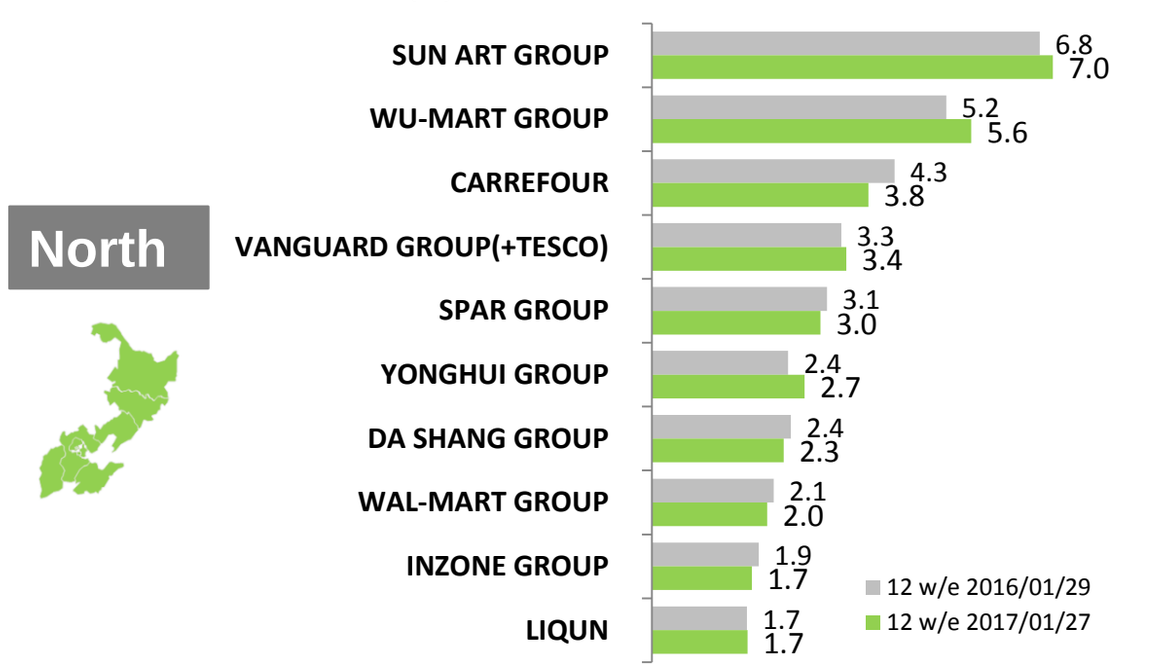
Retail Share by Top 10: West

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. Watsons Group includes Parknshop, Watsons, Taste

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