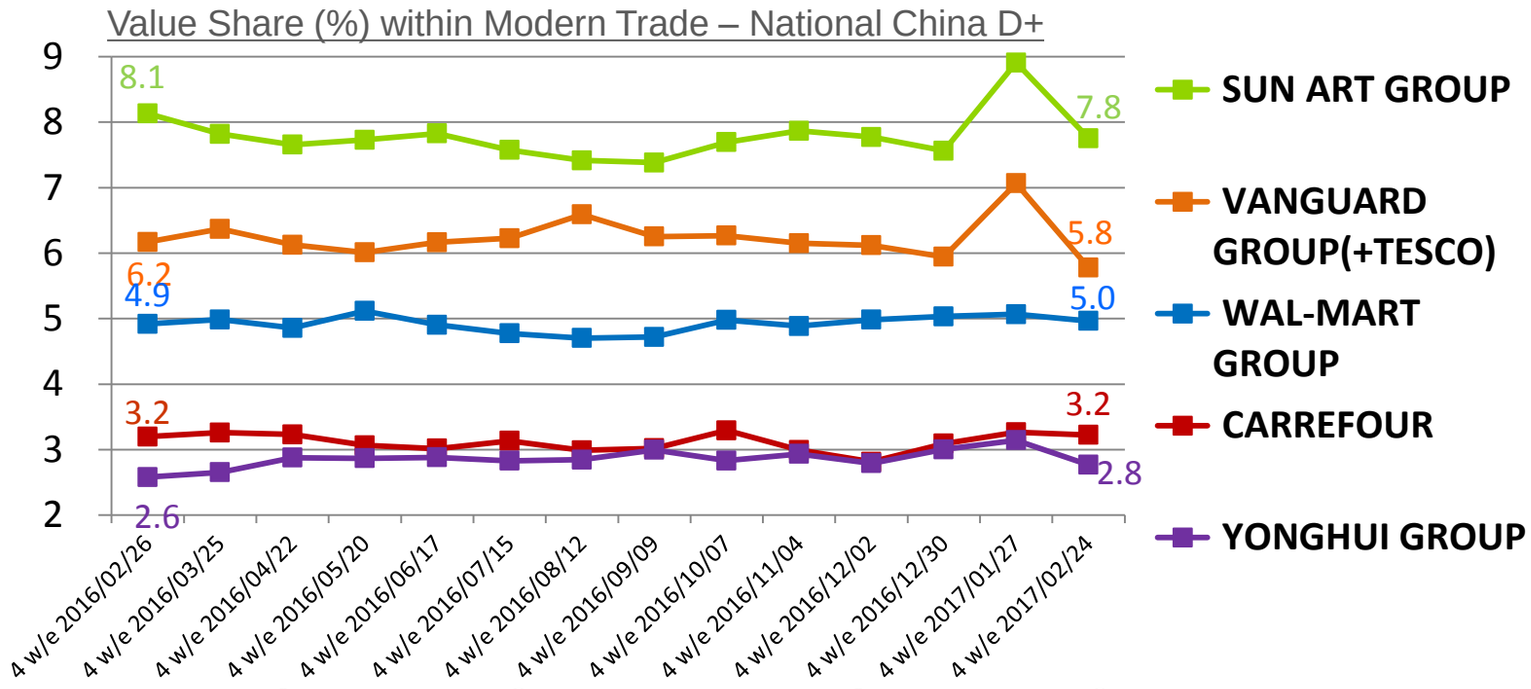
March. 2017 | Retail Snapshot

4 week share tracking of top 5 retail groups

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



After the CNY peak, all top 5 retailers' market share fell in February. Walmart grew market share compared to the same period last year.

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

12 w/e P2 2017 vs 12w/e P2 2016: Penetration vs Trip Spend vs Frequency – National China D+

	More Shoppers?		Higher Value Baskets?		More Trips?	
大潤發 RT-MART / Auchan	18.1%	-2.3%	111.5 RMB	-0.6%	4.2 trips	-2.2%
Vanguard 华润万家 / 乐购	14.5%	-2.4%	106.6 RMB	-0.2%	4.2 trips	-2.5%
Walmart 中国	13.7%	-5.1%	117.2 RMB	+5.8%	3.2 trips	-2.0%
Carrefour	9.4%	-9.5%	112.1 RMB	+3.5%	3.1 trips	+1.0%
永辉超市 YONGHUI SUPERSTORES	8.2%	+6.7%	90.5 RMB	+4.0%	4.1 trips	-1.5%

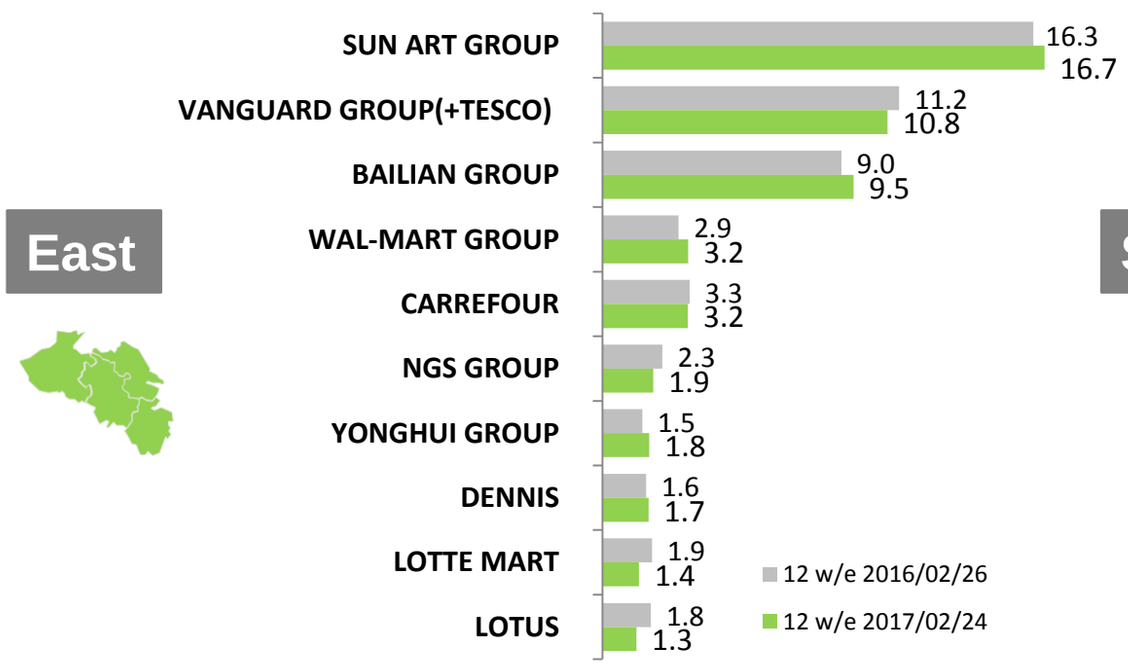
Among top 5 retailers, only Yonghui grew penetration vs. the same period last year, while others saw penetration decline.

Walmart enjoyed the highest basket spend and leads the growth of higher trip spend.

Local retailers saw strong growth. Yonghui group grew across all regions. Wumart outperformed in the North.

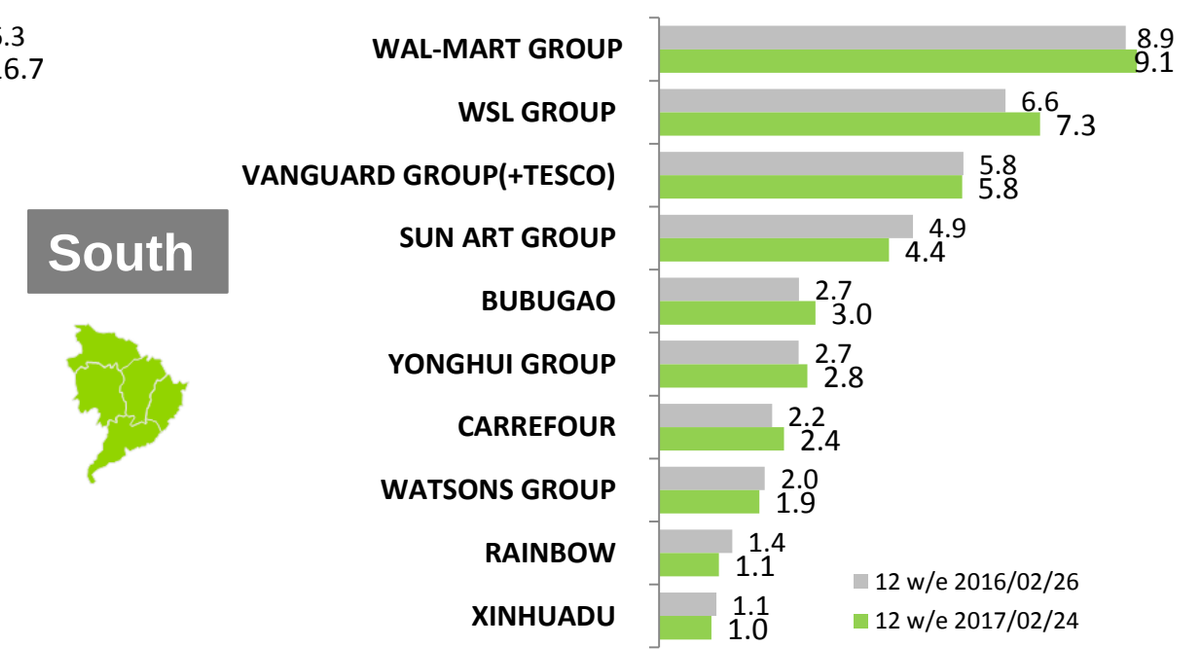
Retail Share by Top 10: East

Value Share (%) – East



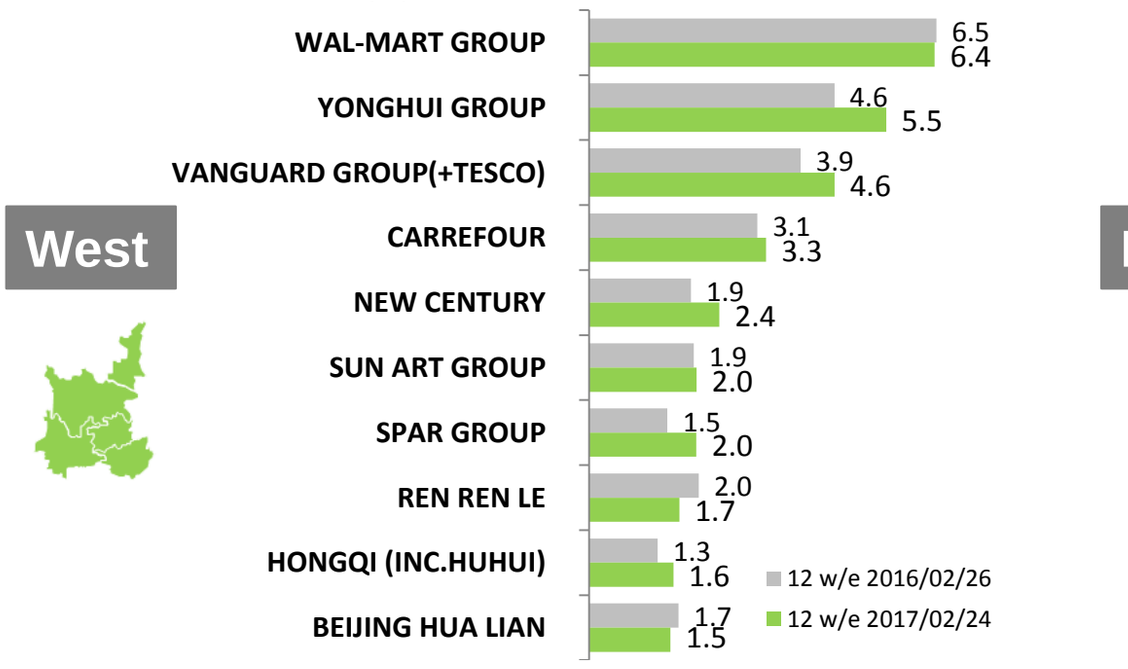
Retail Share by Top 10: South

Value Share (%) – South



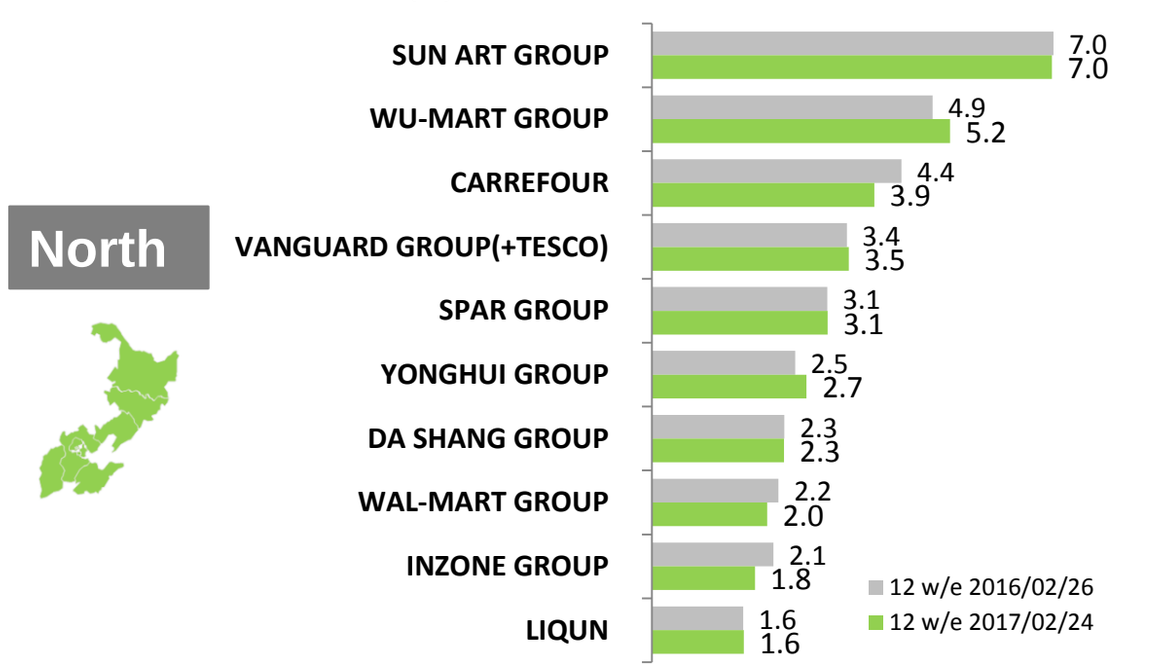
Retail Share by Top 10: West

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. Watsons Group includes Parknshop, Watsons, Taste

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