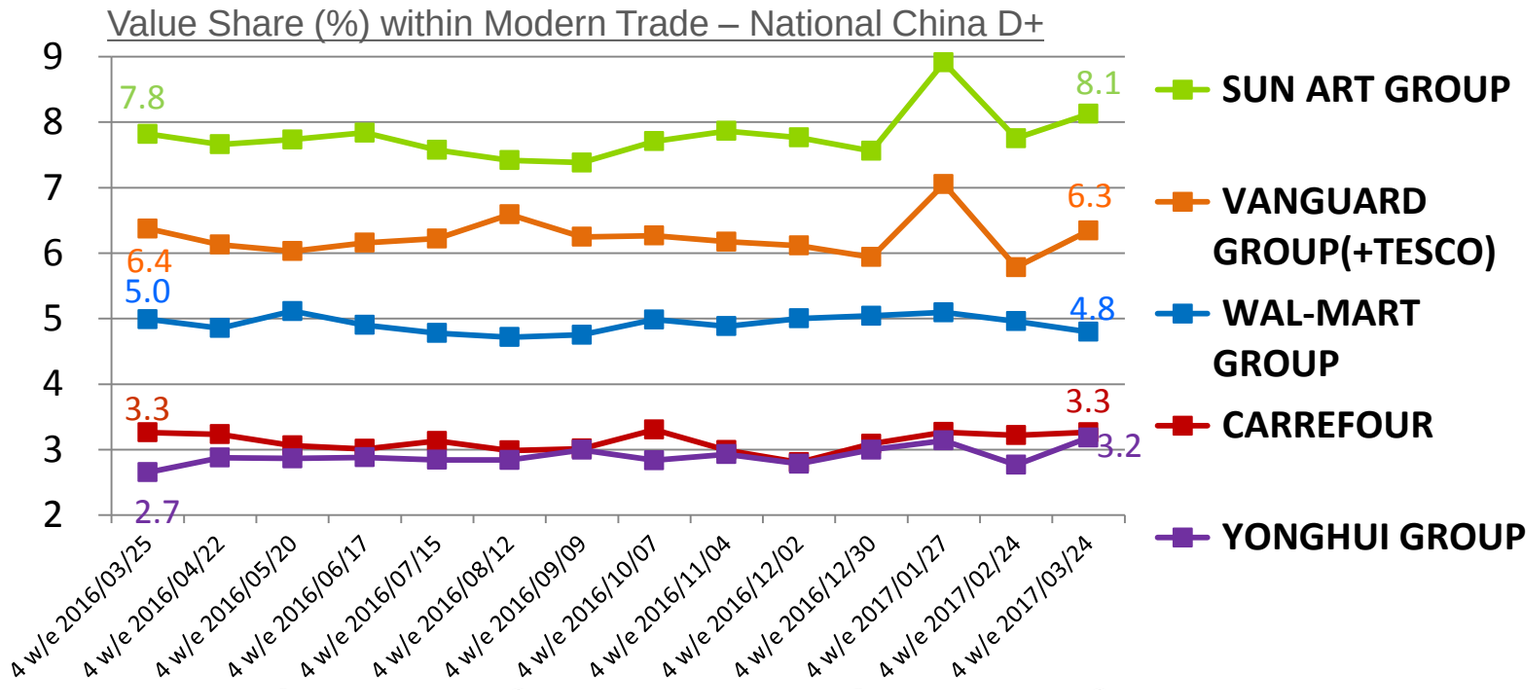
April. 2017 | Retail Snapshot

4 week share tracking of top 5 retail groups

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



Sun Art and Vanguard saw share rebound in the latest 4 weeks while Yonghui continued to edge closer to Carrefour

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

12 w/e P3 2017 vs 12w/e P3 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%	-1.2%	113.0 RMB	-0.4%	4.2 trips	-1.7%
Vanguard 华润万家 / 乐购	14.6%	-1.7%	107.2 RMB	-0.0%	4.2 trips	-1.5%
Walmart 中国	13.7%	-4.4%	119.0 RMB	+5.9%	3.2 trips	-4.2%
Carrefour	9.3%	-8.2%	115.7 RMB	+5.1%	3.1 trips	-0.2%
永辉超市 YONGHUI SUPERSTORES	8.3%	+9.3%	91.8 RMB	+3.7%	4.1 trips	-1.9%

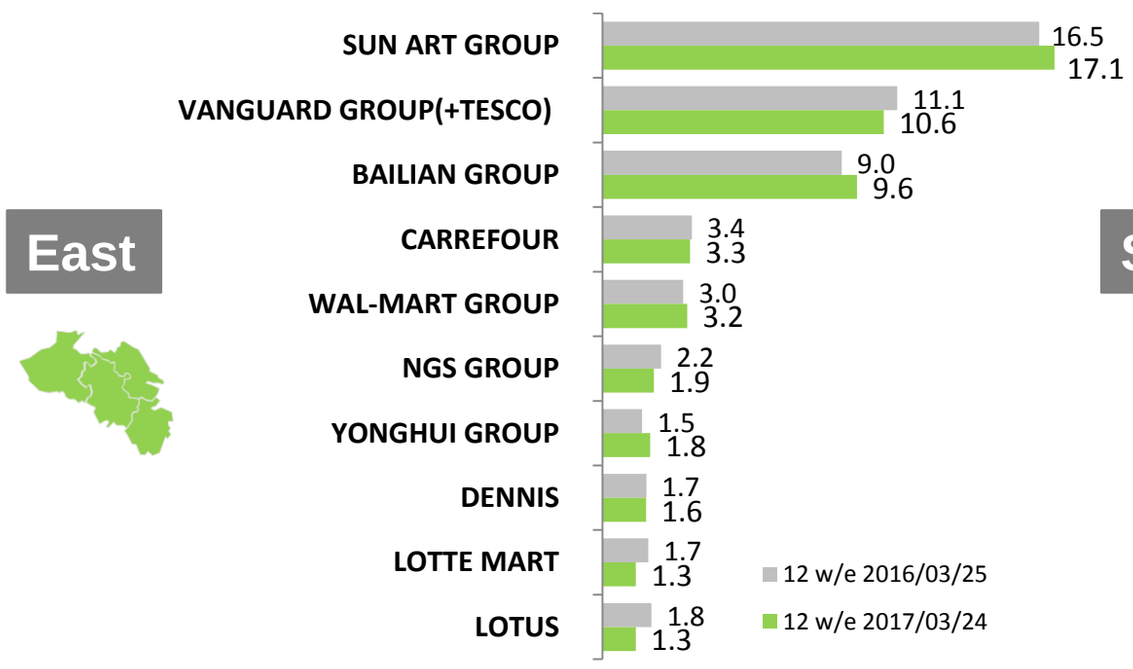
Walmart continued to lead in basket size, while suffered losses in shopping trips. Sun Art group started to experience weakness in all aspects

All major retailer group lost shoppers in the latest 12 weeks except Yonghui, though its basket size still smaller due to mixed format strategy

Bubugao saw strong growth in the South while Yonghui advanced across all regions

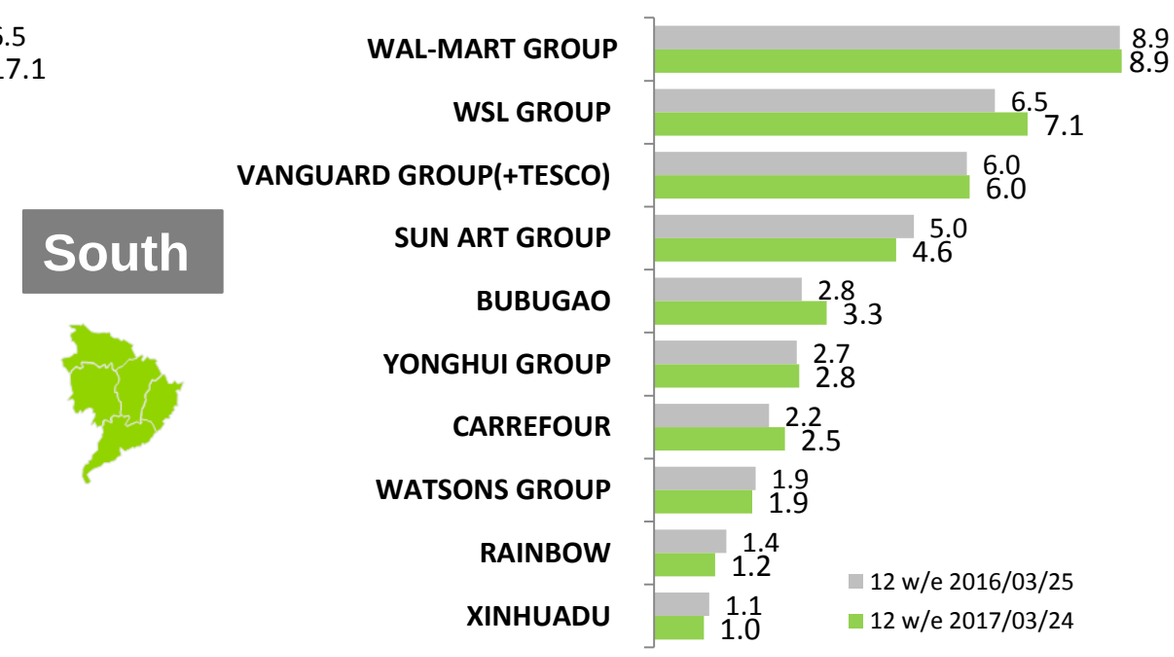
Retail Share by Top 10: East

Value Share (%) – East



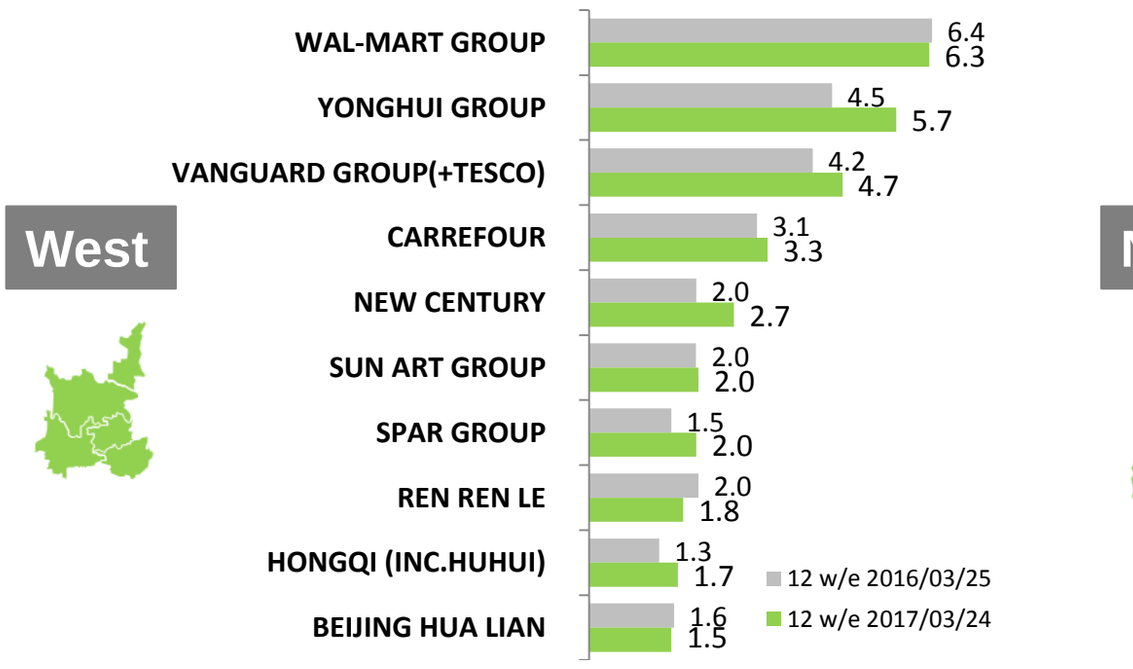
Retail Share by Top 10: South

Value Share (%) – South



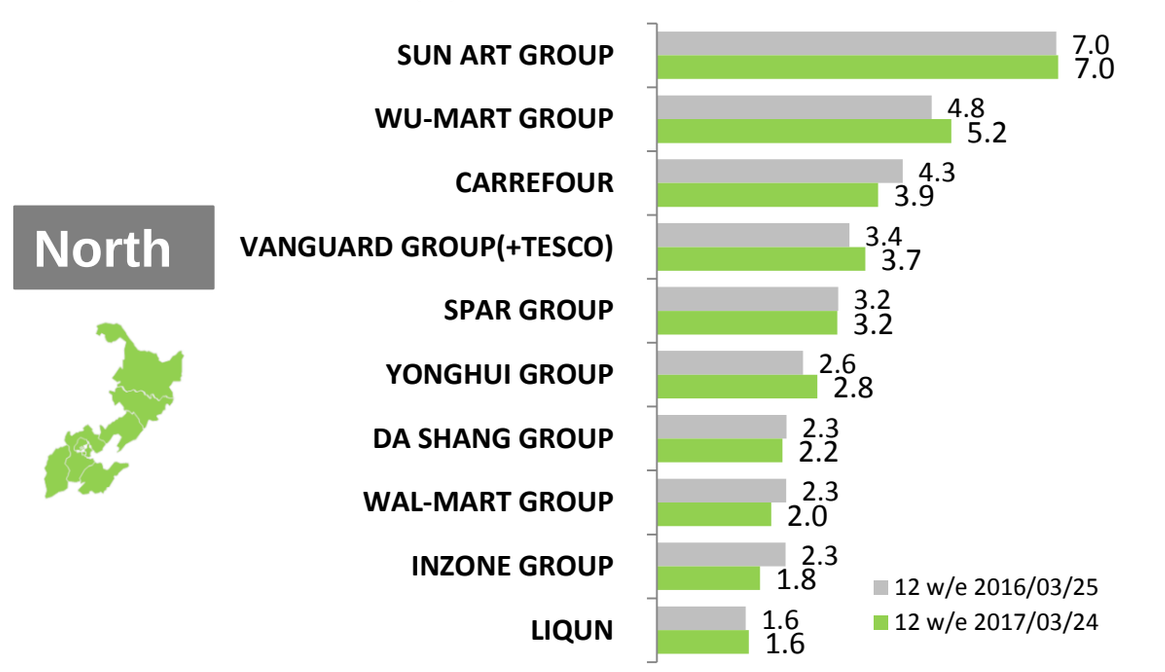
Retail Share by Top 10: West

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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