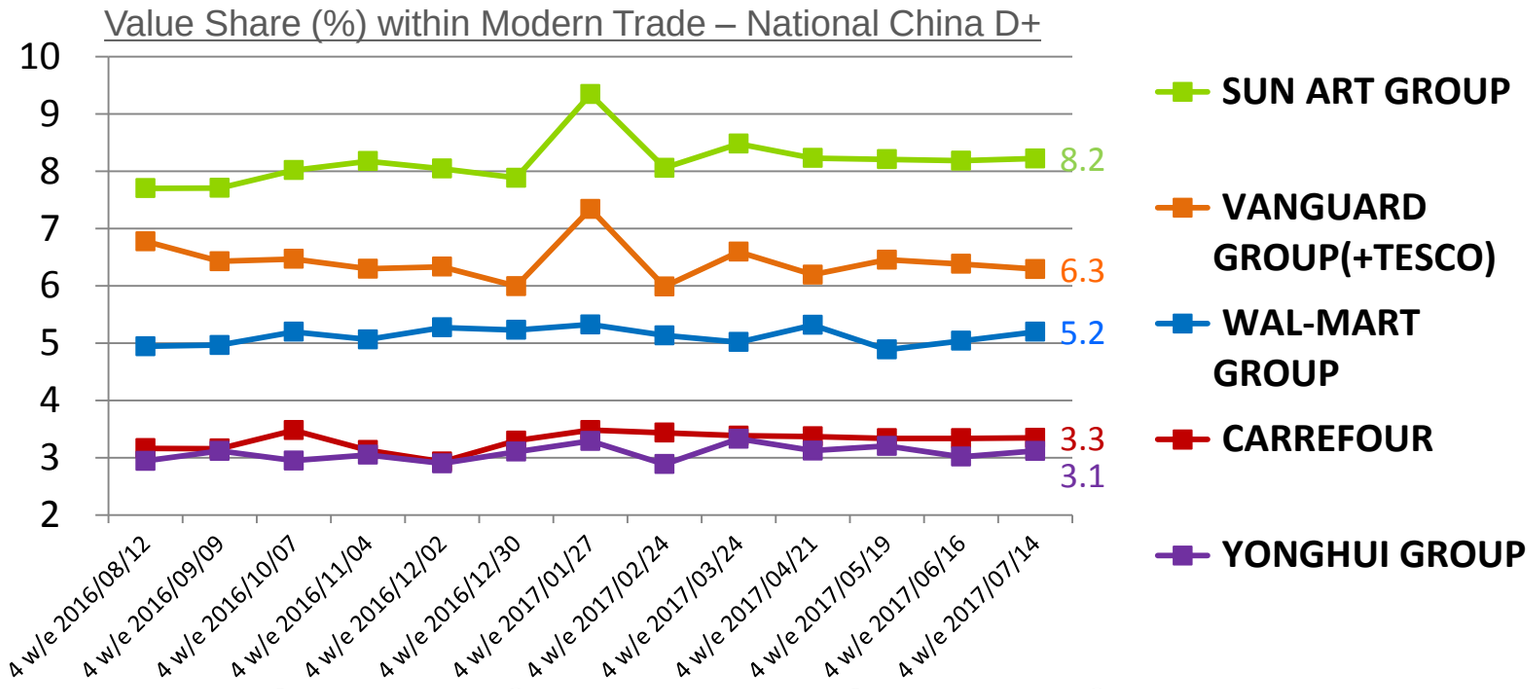
Sept. 2017 | Retail Snapshot

4 week share tracking of top 5 retail groups

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



Yonghui Group saw growth in July, challenging Carrefour's number 4 position.

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

12 w/e P7 2017 vs 12w/e P7 2016: Penetration vs Trip Spend vs Frequency – National China D+

	More Shoppers?		Higher Value Baskets?		More Trips?	
大潤發 RT-MART / Auchan	17.0%	-1.6%	93.3 RMB	+2.8%	4.3 trips	+1.2%
Vanguard 华润万家 / 乐购	13.9%	-2.3%	86.2 RMB	+4.0%	4.4 trips	-0.6%
Walmart 中国	12.8%	-4.0%	96.9 RMB	+6.1%	3.4 trips	-3.1%
Carrefour	8.5%	-6.9%	97.5 RMB	+9.5%	3.3 trips	+2.0%
永辉超市 YONGHUI SUPERSTORES	8.1%	+8.0%	74.3 RMB	-0.9%	4.3 trips	-2.6%

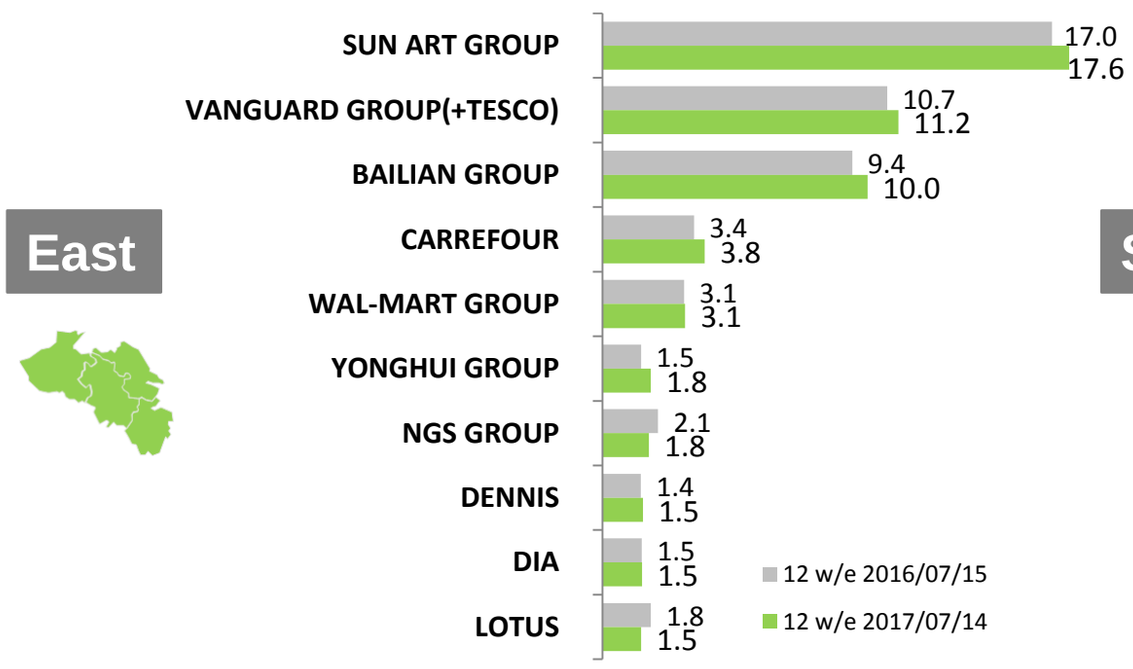
Yonghui's buyer base expanded to 8.1%, further closing its gap with Carrefour

Walmart and Carrefour see an increase in their average basket value as both stores lose lighter buyers.

Regional players further strengthened their position in their homeland

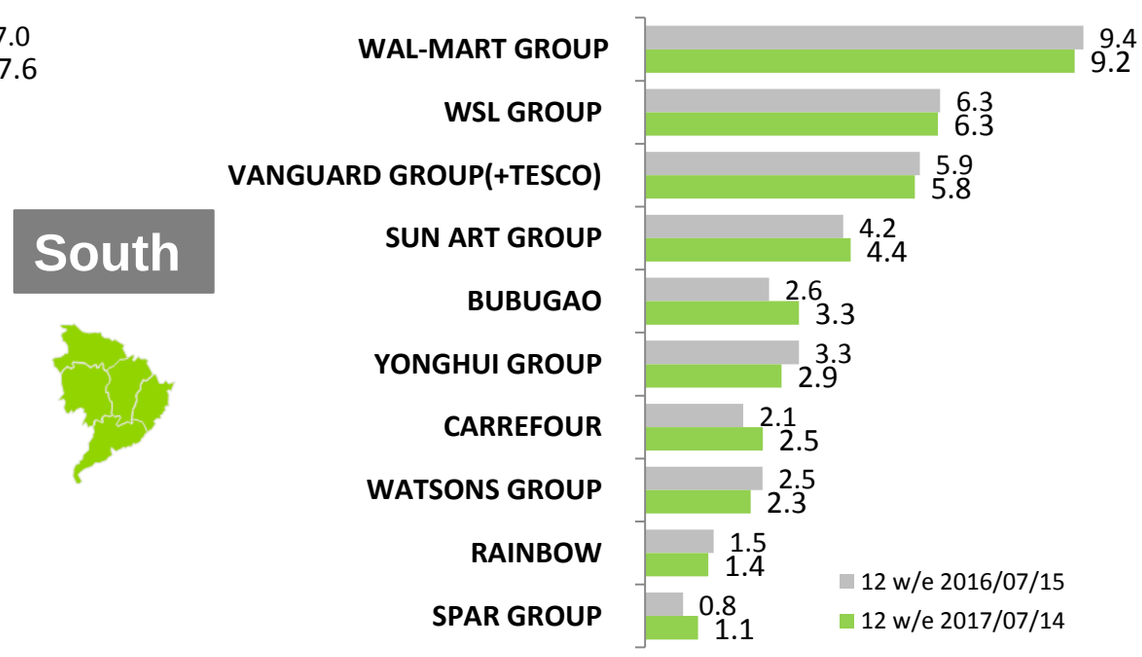
Retail Share by Top 10: East

Value Share (%) – East



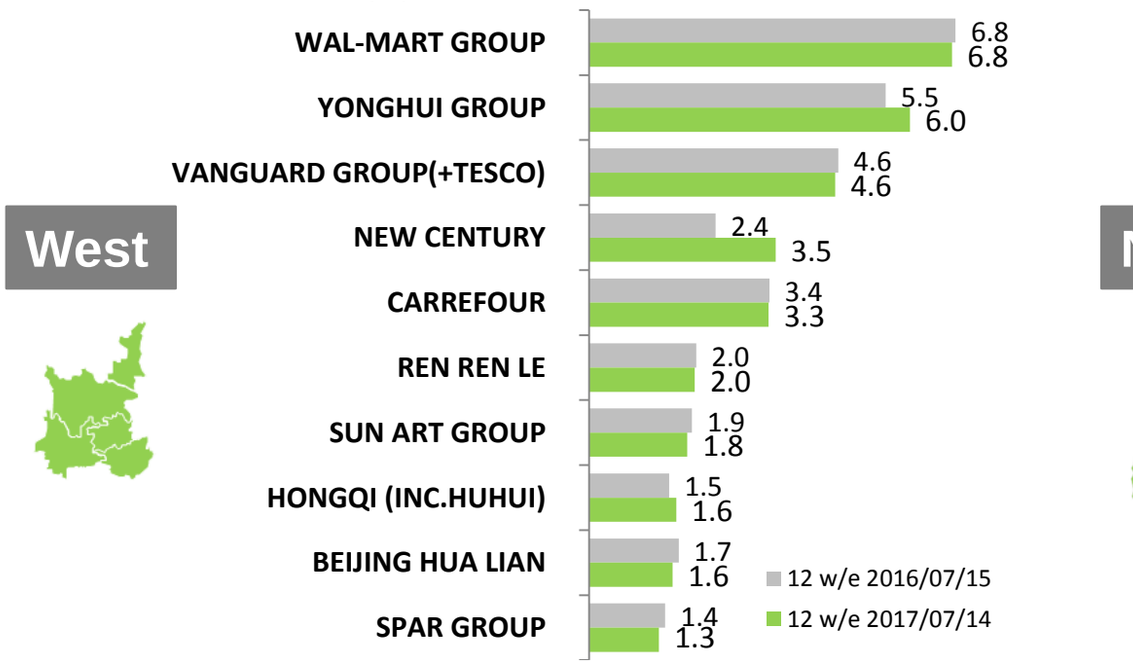
Retail Share by Top 10: South

Value Share (%) – South



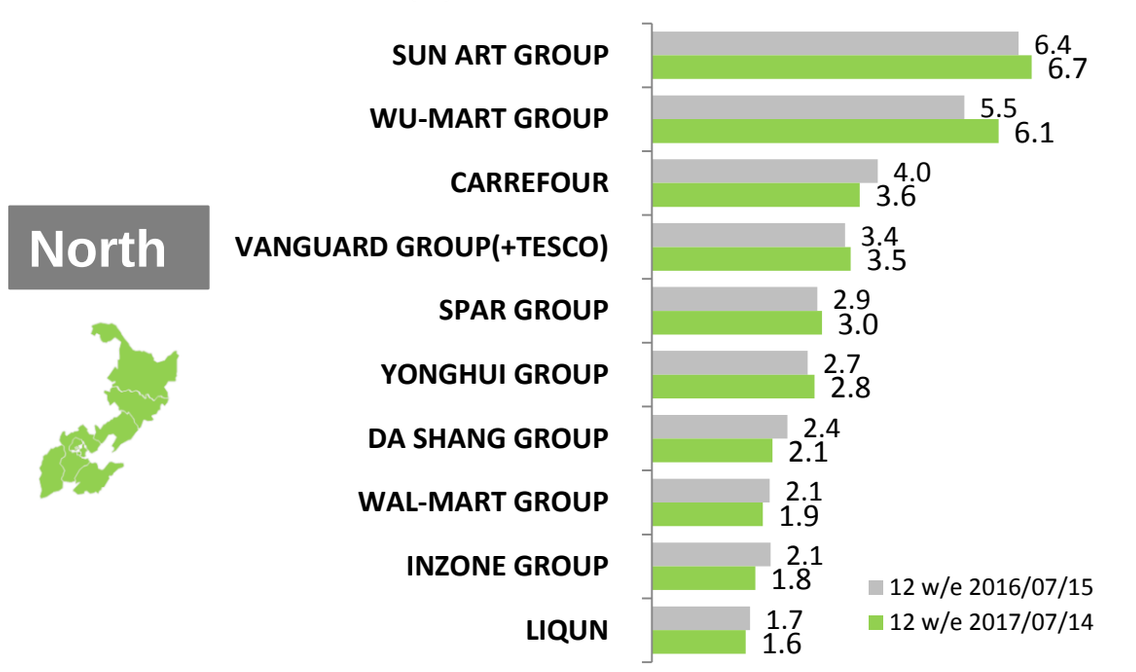
Retail Share by Top 10: West

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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