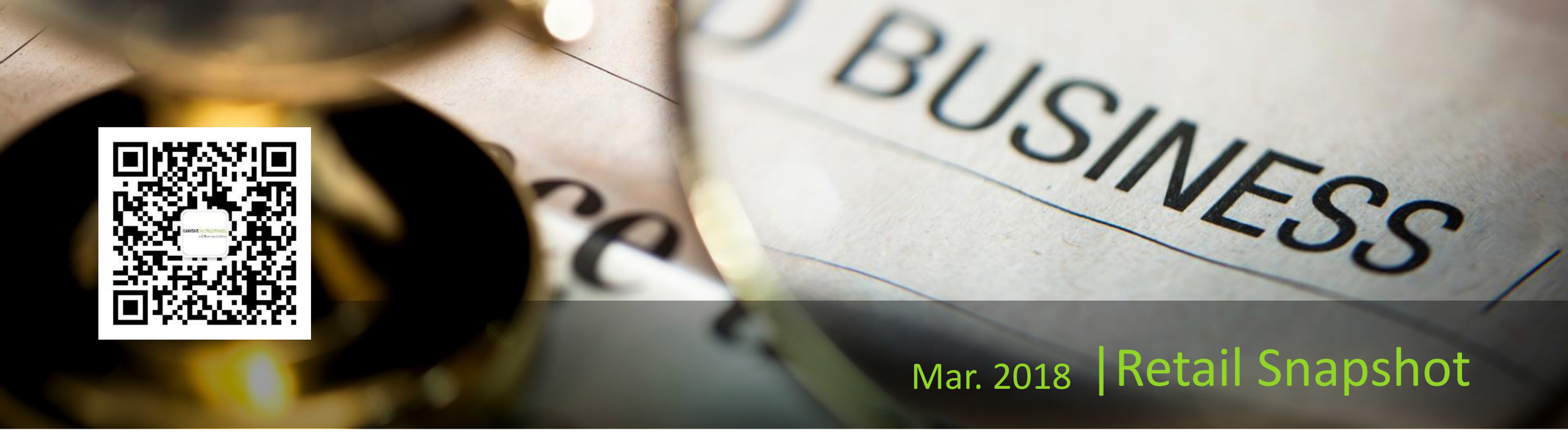
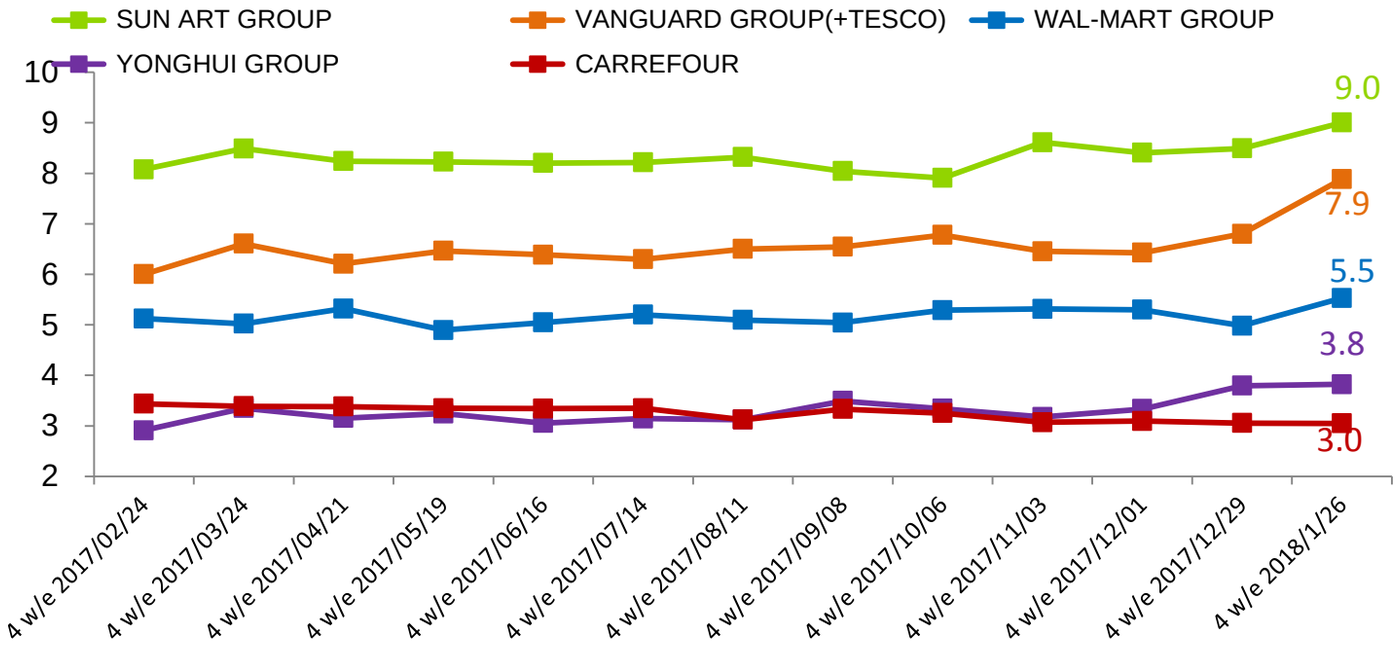


Mar. 2018 | Retail Snapshot

4 week share tracking of top 5 retail groups

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



In January, Vanguard's market share hit a record high of 7.9%, while Sun Aar Group and Walmart also benefited from the Pre-CNY periods.

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

12 w/e P1 2018 vs 12w/e P1 2017: Penetration vs Trip Spend vs Frequency – National China D+

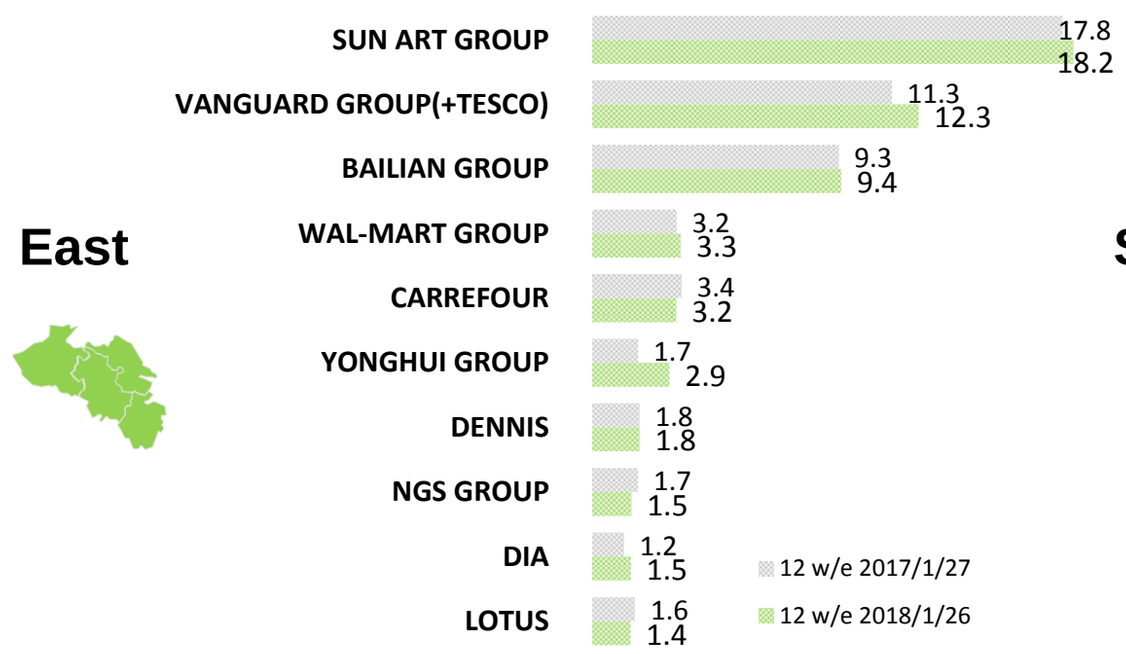
	More Shoppers?		Higher Value Baskets?		More Trips?	
大潤發 RT-MART / Auchan	18.3%	+0.7%	92.8 RMB	-6.3%	4.0 trips	-2.1%
Vanguard 华润万家 / 乐购	14.8%	+0.1%	88.3 RMB	-4.6%	4.3 trips	+1.3%
Walmart 中国	13.0%	-5.8%	96.9 RMB	-7.0%	3.3 trips	+3.8%
永辉超市 YONGHUI SUPERSTORES	9.7%	+18.2%	74.4 RMB	-7.7%	4.0 trips	-2.7%
Carrefour	8.4%	-10.1%	91.8 RMB	-7.5%	3.1 trips	+3.0%

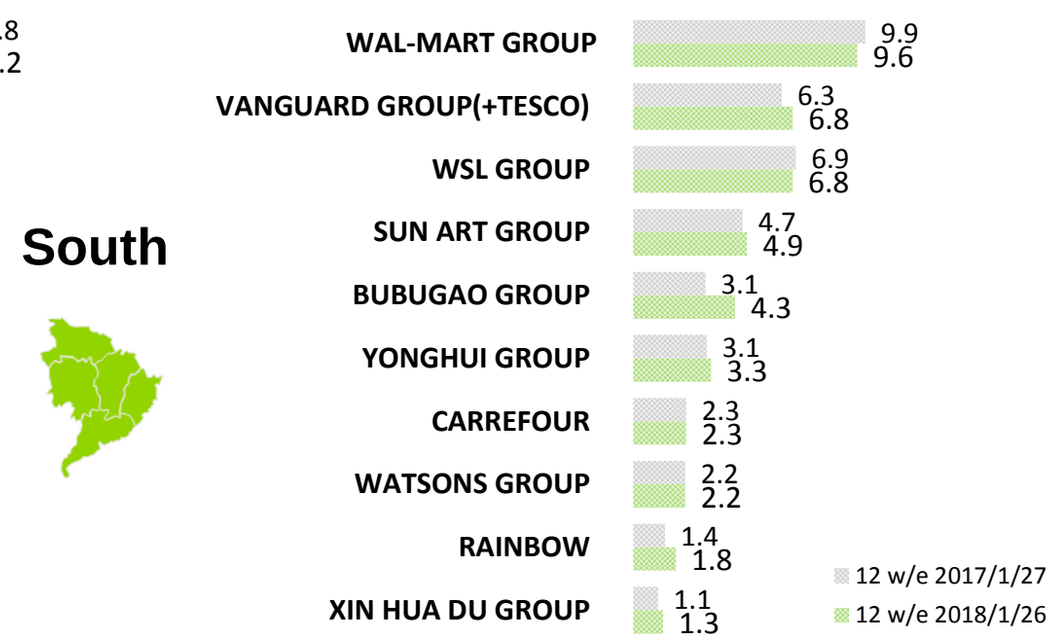
Yonghui has enjoyed a faster growth by recruiting more shoppers, with shopper base now well ahead of Carrefour

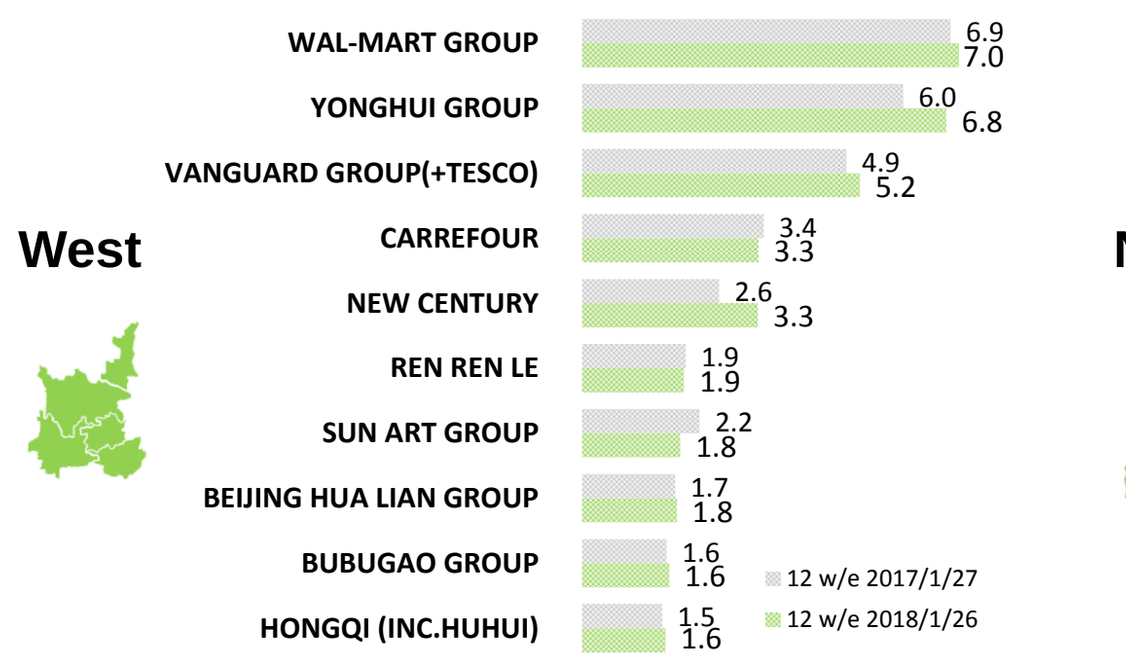
Walmart and Carrefour continued to experience weakness in penetration compared with last year

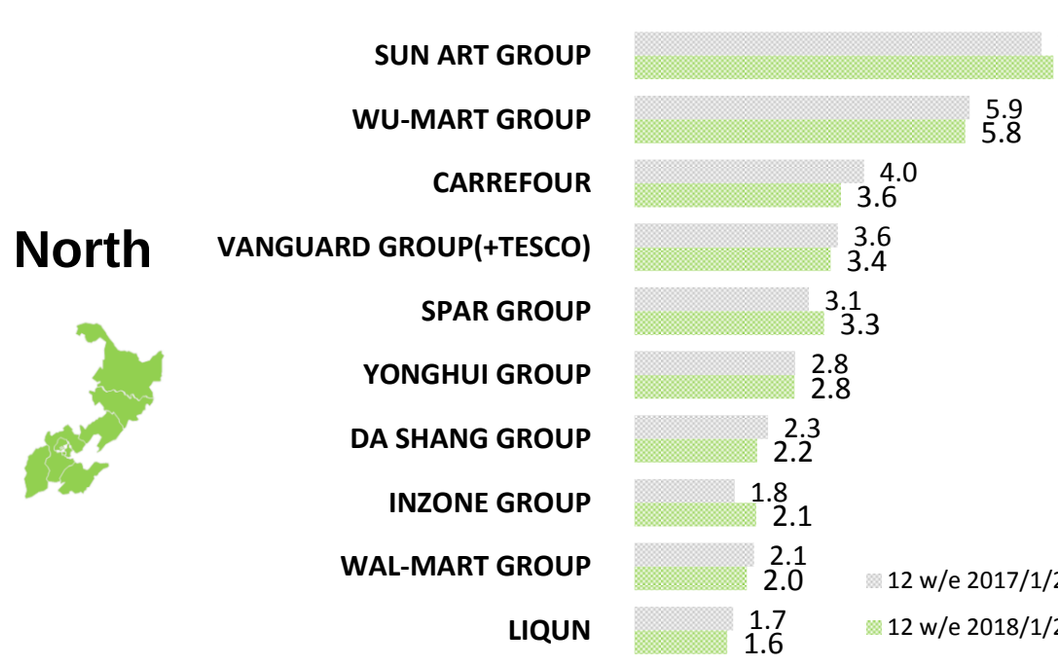
12 week share tracking of top 10 retail groups in four regions

Yonghui is challenging Wal-Mart's No.1 position in the West. Bubugao saw strong growth in the South.









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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