

COOPMART IS STILL THE BIGGEST, VINMART AND AUCHAN EXPANDING FAST.

SUPER MARKET – No. of store

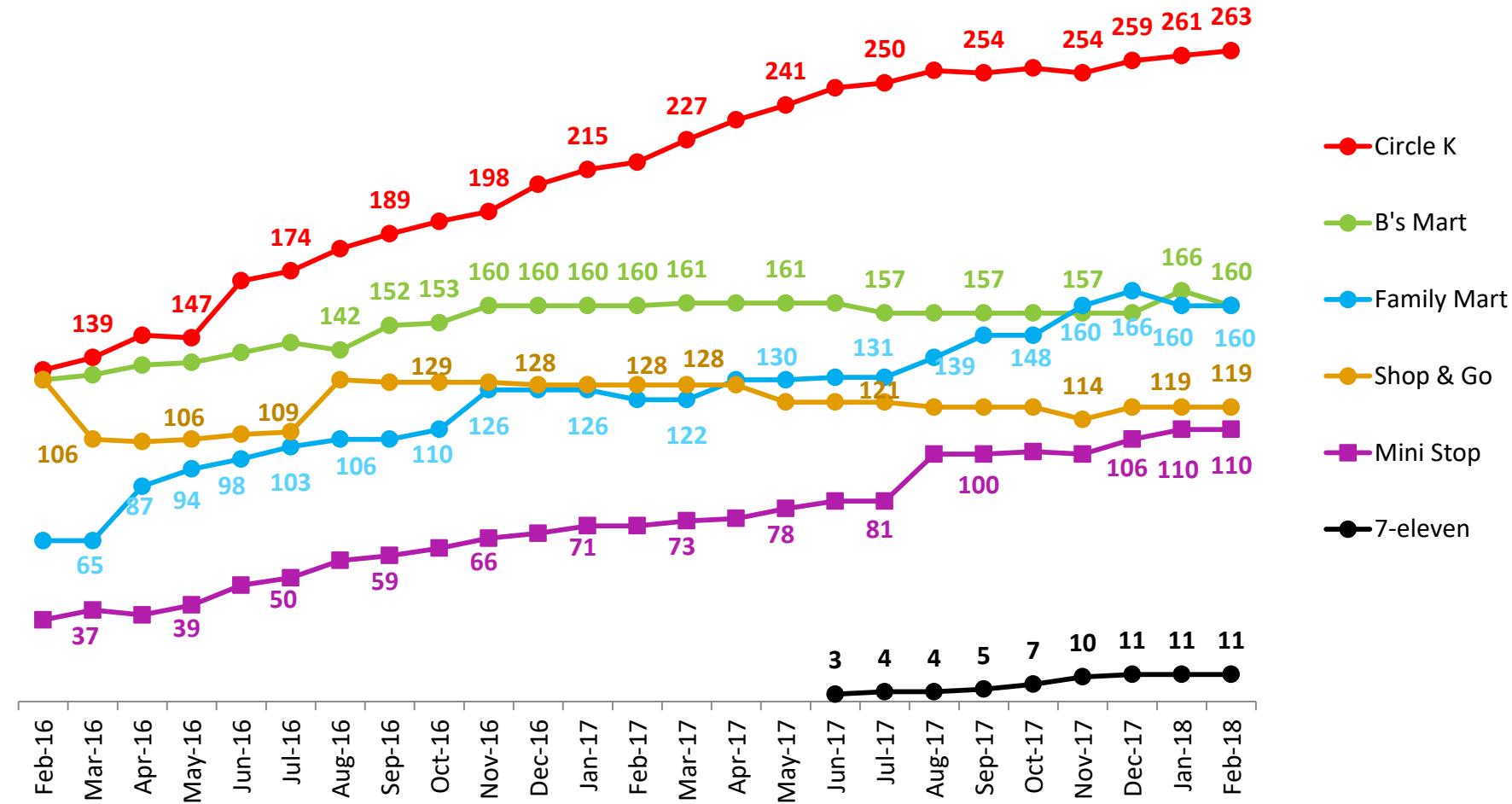
Super market	Feb 17	Feb 18
Co.op Mart 	87	95
VinMart 	67	75
Big C 	33	35
Fivimart 	26	24
Aeon Citimart 	19	20
Lan Chi Mart 	18	22
Muong Thanh Mar 	14	21
Mega Market 	19	19
Auchan 	10	17

Super market	Feb 17	Feb 18
Lotte Mart 	13	13
Miền Tây Market		13
Hapro Mart 	14	12
Intimex 	12	12
Thanh Do Mart 		10
AEON 	4	4
SatraMart 	3	3
Co.opmart Extra Plus 	2	3
Emart 	1	1

Source: Retailers' official website

CIRCLE K, FAMILY MART AND MINI-STOP EXPANDING PRESENCE RAPIDLY

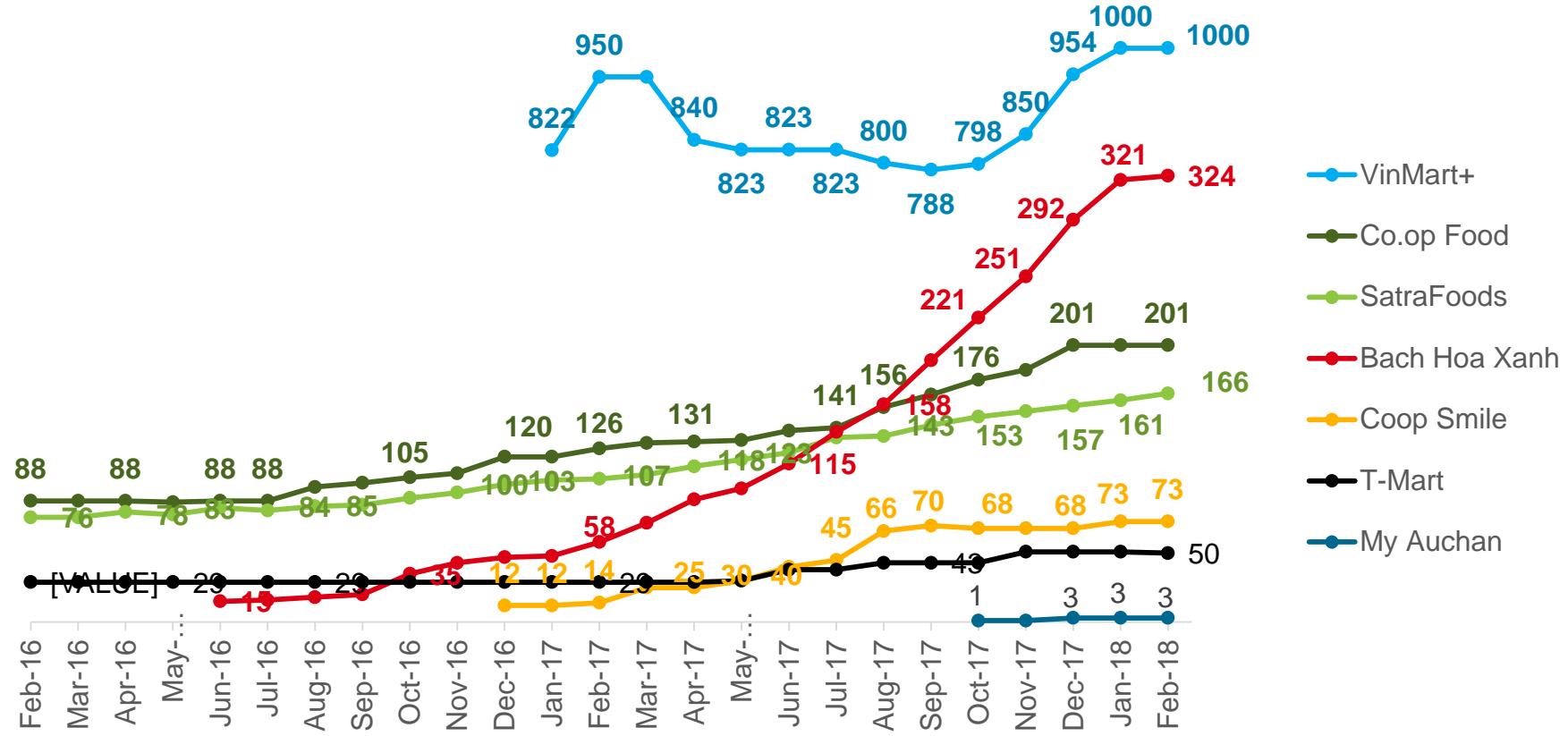
CONVENIENT STORE – No. of store



Source: Retailers' official website

BACH HOA XANH KEPT MOMENTUM.

FOOD MINIMART – No. of store



Source: Retailers' official website

TEEMING WITH POSSIBILITIES, COMPETITION IN MODERN TRADE IS GETTING TOUGHER WITH NEW & EMERGING PLAYERS...

~56%

Categories have **more new launches** in MT than TT, especially...



Beverage



Personal Care

MORE NEW LAUNCHES OBSERVED IN MT

~56%

Categories have **tougher competition*** in MT than TT, especially...



Milk-based



Food

MT IS BECOMING MORE FRAGMENTED

~77%

Categories have **imported** products increasing importance, especially...



Personal Care



Home care

IMPORTED PRODUCTS POSE A THREAT IN MT

~63%

Categories have **different top 3** brands in TT vs. MT, especially...



Personal Care



Food

WIN IN TT DOES NOT ALWAYS MEANS THE SAME IN MT

Source: Nielsen Retail Audit data ending Jun'18. MT Urban except Beer, Beverage and Cigarette is MT Partial
New launches considered at variant level in TT Urban vs. MT Urban MAT TY

*Tougher competition: Top 3 brands lose share faster/gain share less in MT than TT MAT TY vs. YA

Top brands based on Value sales in each market MAT TY. Top 3 brands are different in MT vs. TT when 1 of 3 brands is different

INCREASINGLY AMOUNT OF SHOPPERS EXPECT EASY, ALL-IN-ONE & CONVENIENT SHOPPING EXPERIENCE

STORE FORMAT & WIDE CHOICE BECOME MORE IMPORTANT

SUPERMARKET CONSUMERS' MOST NEEDED ATTRIBUTES

2016

2017

- Convenient to get to #1
- A place where its easy to quickly find what I need #3
- Everything I need in one shop #7

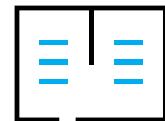
WITH 4 NEW ATTRIBUTES ABOUT CONVENIENCE IN THE TOP 10



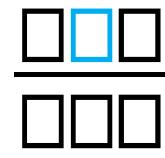
High quality prepared meals



Efficient checkout counters



Well presented product displays

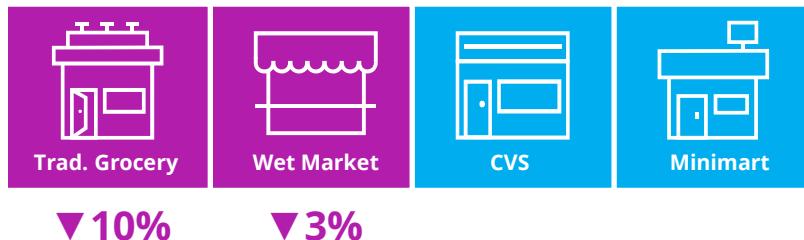


Always have what I want in stock

CONVENIENCE IS NOT ONLY ABOUT OFFERINGS OR LAYOUT, IT IS ALSO ABOUT NEW ON-THE-GO STORE FORMATS

Traditional Format Are Falling Behind

Store penetration



CVS Shoppers – Who Are They?

41%

Youngsters

16% Working Women

9% House Wives

30% Gen Z* and **26%** Millennials** go to supermarkets or CVS to gather and hang out with friends



* 12 - 21 Yo (1996 - 2005)

** 22 - 29 Yo (1988 - 1995)

Vietnam will have the highest female labour force participation rate* in Asia Pacific by 2025 (79.6%)

~73.2%
(2018)

~79.6%
(2025)

* population in the age group of 16-64 currently employed or seeking employment

IMPORTANCE OF CATEGORY INNOVATION

As shoppers are quite open to try the new products, hence they are considering the category innovation is very important to them.

IMPORTANCE OF CATEGORY INNOVATION (%)

