

## Top 50 Global Retailers (USD)

June 2020

2020E Global Rank	2025E Global Outlook	Retailer/ Parent Company	Home Country	2020E Retail Sales (\$MM)	2020E Global Stores	Sales CAGR ('15-'20E)	Sales CAGR ('20E-'25E)	2020E % Retail Sales Outside Home Market
1	◄◄	Walmart <sup>1</sup>	US	\$527,806	11,505	2%	3%	22%
2	◄◄	Amazon.com <sup>2</sup>	US	\$268,187	546	24%	12%	34%
3	◄◄	Costco	US	\$156,646	813	6%	6%	26%
4	▼	Schwarz Group	Germany	\$133,334	12,679	7%	5%	66%
5	▼	Kroger	US	\$124,924	2,899	2%	3%	0%
6	▼	Walgreens Boots Alliance	US	\$116,358	14,542	5%	3%	12%
7	▼	Home Depot	US	\$111,257	2,295	5%	3%	8%
8	▲	Aldi <sup>3</sup>	Germany	\$110,600	12,089	5%	5%	72%
9	▲	JD.com <sup>4</sup>	China	\$103,318	N/A	26%	15%	0%
10	▼	Carrefour	France	\$94,221	12,723	-1%	3%	58%
11	◄◄	Seven & I	Japan	\$92,428	36,455	4%	3%	26%
12	◄◄	CVS	US	\$88,952	9,890	4%	4%	0%
13	▼	Tesco	UK	\$84,076	12,848	0%	3%	25%
14	▼	Target	US	\$80,429	1,883	2%	3%	0%
15	▼	Ahold Delhaize	Netherlands	\$77,639	7,206	2%	2%	77%
16	◄◄	Aeon	Japan	\$76,978	13,192	4%	3%	8%
17	▼	Lowe's	US	\$71,152	2,227	4%	3%	7%
18	▼	Albertsons Companies	US	\$63,760	2,248	2%	1%	0%
19	▲	Alibaba <sup>4</sup>	China	\$62,276	200	37%	12%	2%
20	◄◄	Apple	US	\$60,687	510	10%	3%	12%
21	▼	Edeka	Germany	\$53,215	11,278	3%	2%	0%
22	▼	Auchan	France	\$51,718	1,899	-5%	1%	70%
23	▲	Ikea	Sweden	\$51,091	466	7%	7%	96%
24	▲	Casino	France	\$51,062	13,124	-1%	3%	52%
25	▲	Rewe	Germany	\$49,807	11,614	3%	3%	32%
26	◄◄	Leclerc	France	\$46,503	1,994	3%	3%	5%
27	▼	Intermarché	France	\$43,578	3,529	2%	1%	10%
28	▲	Suning <sup>4</sup>	China	\$41,812	4,373	15%	5%	5%
29	▲	Woolworths Limited (Aus)	Australia	\$41,476	3,046	0%	3%	14%
30	▼	Best Buy	US	\$40,673	1,207	2%	3%	7%
31	▼	Publix	US	\$39,338	1,490	4%	3%	0%
32	▼	FamilyMart UNY	Japan	\$39,216	25,269	3%	3%	12%
33	▼	Metro AG <sup>5</sup>	Germany	\$38,912	10,091	-10%	2%	70%
34	▼	A.S. Watson	Hong Kong	\$36,488	15,723	4%	3%	81%
35	▲	TJX	US	\$34,170	4,553	2%	5%	28%
36	▼	Sainsbury's	UK	\$33,843	1,971	-1%	1%	0%
37	▼	Loblaw	Canada	\$31,426	2,432	2%	4%	0%
38	▲	China Resources Enterprise	China	\$30,312	6,288	10%	10%	3%
39	▲	Mercadona	Spain	\$30,011	1,651	7%	6%	0%
40	▼	H-E-B	US	\$29,440	406	6%	3%	6%
41	▲	Dollar General	US	\$29,233	17,143	8%	6%	0%
42	▲	X5 Retail Group	Russia	\$27,277	18,162	16%	6%	0%
43	▼	Système U	France	\$26,488	1,649	3%	2%	3%
44	▼	Coles <sup>6</sup>	Australia	\$26,024	2,381	-1%	3%	0%
45	▲	Dairy Farm	Hong Kong	\$25,104	6,400	7%	6%	88%
46	▼	Adeo Group	France	\$24,802	1,066	8%	2%	65%
47	▼	Ceconomy	Germany	\$24,428	1,024	0%	2%	50%
48	▼	Dollar Tree	US	\$23,716	15,424	3%	3%	1%
49	▼	Coop Schweiz	Switzerland	\$23,673	2,207	1%	3%	21%
50	▲	Lawson	Japan	\$23,564	16,890	7%	5%	3%

<sup>1</sup> Divested Brazil operation to Grupo Big effective FY 2020. <sup>2</sup> Includes Whole Foods Market. <sup>3</sup> Combines Aldi Nord, Trader Joe's, and Aldi Sued. <sup>4</sup> Direct sales only, not GMV. <sup>5</sup> Divested China operation to Wumart effective FY 2020. <sup>6</sup> Wesfarmers spun off Coles as an independent entity effective FY 2019.

All figures are estimates based on FY 2019 full-year and YTD results (primarily reported in March/April 2020).

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## Top 50 Global Retailers (EUR)

June 2020

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1	◄◄	Walmart <sup>1</sup>	US	€ 471,053	11,505	2%	2%	22%
2	◄◄	Amazon.com <sup>2</sup>	US	€ 239,349	546	24%	11%	34%
3	◄◄	Costco	US	€ 139,802	813	6%	6%	26%
4	▼	Schwarz Group	Germany	€ 118,997	12,679	6%	5%	66%
5	▼	Kroger	US	€ 111,491	2,899	2%	2%	0%
6	▼	Walgreens Boots Alliance	US	€ 103,846	14,542	5%	2%	12%
7	▼	Home Depot	US	€ 99,294	2,295	4%	2%	8%
8	▲	Aldi <sup>3</sup>	Germany	€ 98,707	12,089	5%	4%	72%
9	▲	JD.com <sup>4</sup>	China	€ 92,209	N/A	26%	14%	0%
10	▼	Carrefour	France	€ 84,090	12,723	-1%	2%	58%
11	◄◄	Seven & I	Japan	€ 82,490	36,455	4%	3%	26%
12	◄◄	CVS	US	€ 79,387	9,890	4%	3%	0%
13	▼	Tesco	UK	€ 75,036	12,848	0%	2%	25%
14	▼	Target	US	€ 71,781	1,883	2%	3%	0%
15	▼	Ahold Delhaize	Netherlands	€ 69,291	7,206	2%	1%	77%
16	◄◄	Aeon	Japan	€ 68,701	13,192	4%	2%	8%
17	▼	Lowe's	US	€ 63,501	2,227	4%	2%	7%
18	▼	Albertsons Companies	US	€ 56,904	2,248	1%	0%	0%
19	▲	Alibaba <sup>4</sup>	China	€ 55,580	200	37%	11%	2%
20	◄◄	Apple	US	€ 54,161	510	10%	2%	12%
21	▼	Edeka	Germany	€ 47,493	11,278	3%	2%	0%
22	▼	Auchan	France	€ 46,157	1,899	-5%	1%	70%
23	▲	Ikea	Sweden	€ 45,597	466	7%	6%	96%
24	▲	Casino	France	€ 45,571	13,124	-1%	2%	52%
25	▲	Rewe	Germany	€ 44,452	11,614	2%	2%	32%
26	◄◄	Leclerc	France	€ 41,502	1,994	3%	2%	5%
27	▼	Intermarché	France	€ 38,893	3,529	1%	1%	10%
28	▲	Suning <sup>4</sup>	China	€ 37,316	4,373	15%	4%	5%
29	▲	Woolworths Limited (Aus)	Australia	€ 37,016	3,046	0%	2%	14%
30	▼	Best Buy	US	€ 36,300	1,207	2%	2%	7%
31	▼	Publix	US	€ 35,108	1,490	4%	3%	0%
32	▼	FamilyMart UNY	Japan	€ 34,999	25,269	2%	3%	12%
33	▼	Metro AG <sup>5</sup>	Germany	€ 34,728	10,091	-10%	1%	70%
34	▼	A.S. Watson	Hong Kong	€ 32,564	15,723	4%	2%	81%
35	▲	TJX	US	€ 30,496	4,553	2%	4%	28%
36	▼	Sainsbury's	UK	€ 30,204	1,971	-1%	0%	0%
37	▼	Loblaw	Canada	€ 28,047	2,432	2%	4%	0%
38	▲	China Resources Enterprise	China	€ 27,053	6,288	10%	9%	3%
39	▲	Mercadona	Spain	€ 26,784	1,651	7%	5%	0%
40	▼	H-E-B	US	€ 26,275	406	6%	3%	6%
41	▲	Dollar General	US	€ 26,090	17,143	7%	5%	0%
42	▲	X5 Retail Group	Russia	€ 24,344	18,162	16%	5%	0%
43	▼	Système U	France	€ 23,640	1,649	2%	2%	3%
44	▼	Coles <sup>6</sup>	Australia	€ 23,226	2,381	-2%	2%	0%
45	▲	Dairy Farm	Hong Kong	€ 22,405	6,400	7%	5%	88%
46	▼	Adeo Group	France	€ 22,135	1,066	7%	1%	65%
47	▼	Ceconomy	Germany	€ 21,802	1,024	0%	1%	50%
48	▼	Dollar Tree	US	€ 21,166	15,424	3%	2%	1%
49	▼	Coop Schweiz	Switzerland	€ 21,127	2,207	1%	2%	21%
50	▲	Lawson	Japan	€ 21,031	16,890	7%	4%	3%

<sup>1</sup> Divested Brazil operation to Grupo Big effective FY 2020. <sup>2</sup> Includes Whole Foods Market. <sup>3</sup> Combines Aldi Nord, Trader Joe's, and Aldi Sued. <sup>4</sup> Direct sales only, not GMV. <sup>5</sup> Divested China operation to Wumart effective FY 2020. <sup>6</sup> Wesfarmers spun off Coles as an independent entity effective FY 2019.

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