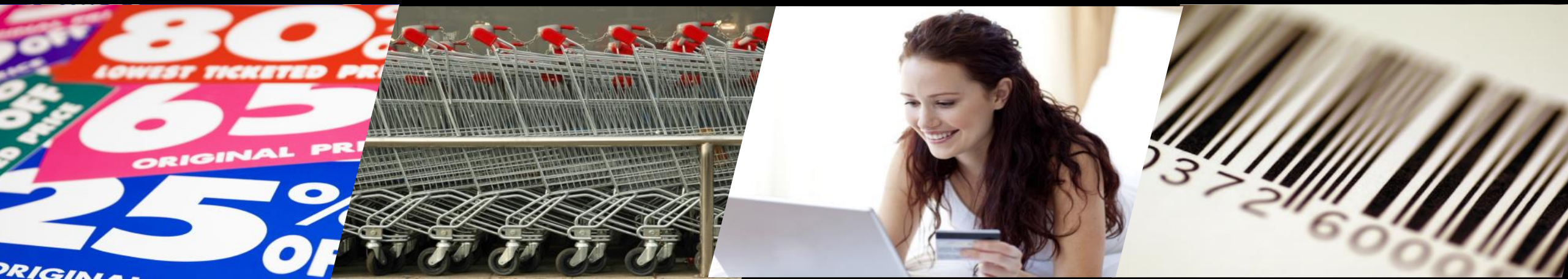
KANTAR WORLDPANEL

Taiwan FMCG Market Trend

2018 Q1



2018 Q1 Main Economics Indicators key index

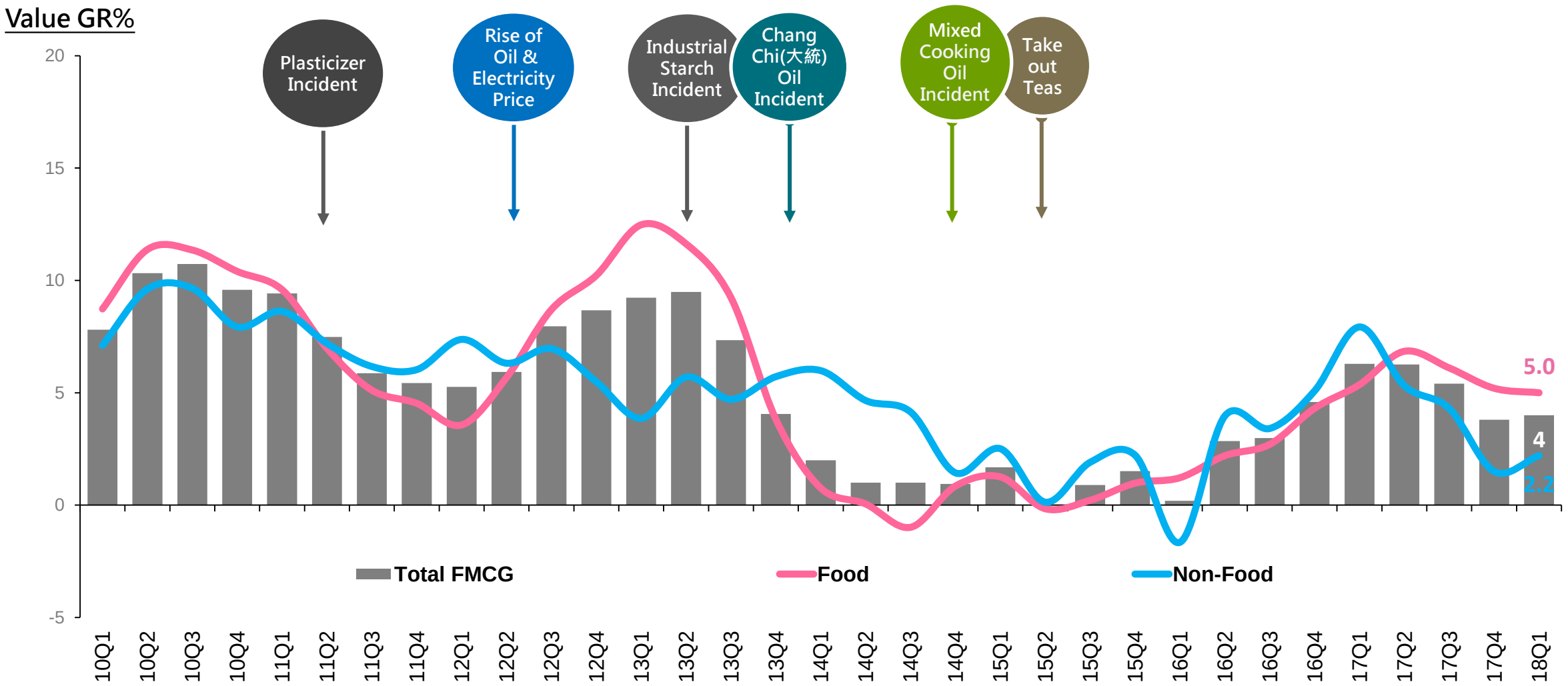
Gross Domestic Product (GDP)	Consumer Price Index (CPI)	Unemployment rate	Total FMCG market sales value growth VSLY
+3.04%	+1.54 %	3.66 %	+4 %
2018 Q1	YTD 2018Q1	2018 Mar	MAT 2018Q1

① Taiwan FMCG market performed stable with 4% growth rate.

- In food categories, home cooking-related categories, including fast cooked noodles and frozen food, are still in growing trend. Cooking for family is a way of showing love and caring. Besides that, new products he healthy concept products like Fresh milk and solid yogurt also performed well. we also observed that RTD tea、potato chips and Bubble water successfully grab attention and create trials by launching new products.
- In non-food categories, the highlight of 18Q1 is the panic buy of toilet paper, the price panic triggers the desperate run on toilet paper, most of the manufactures/retailers grew significantly in panic buy. However, we expect consumers will return to market at least 6 months later. Dish wash, another growing category, perform well in recent years due to the increasing demand in cooking related categories, consumers prefer natural and concentrated function with low price products. Last but not least, something beautiful will give pleasure long, consumers pursue beauty image makes makeup maintains strong momentum.
- Channels: Costco contributes the growth of hyper market, and shows good performance in food categories. Online maintains the growing trend in both food and non-food market, top 5 accounts for 50% of the EC share.

Taiwan Total FMCG Market 52 w/e rolling trend

The market performed stable with 4% growth rate in two consecutive quarters.



Data source：Kantar Worldpanel Household panel

KANTAR WORLDPANEL Category trend

FOOD

Household Cooking

Fast-cooked noodles,
Frozen food(dishes, meat and seafood)

Innovation

Sparkling Water, RTD tea
Potato Chips

Health

Fresh milk, Solid Yogurt

Data source：Kantar Worldpanel Household panel

KANTAR WORLDPANEL Category trend

NON FOOD

Function

Dish Wash

Beauty

Makeup(Lip Gloss)

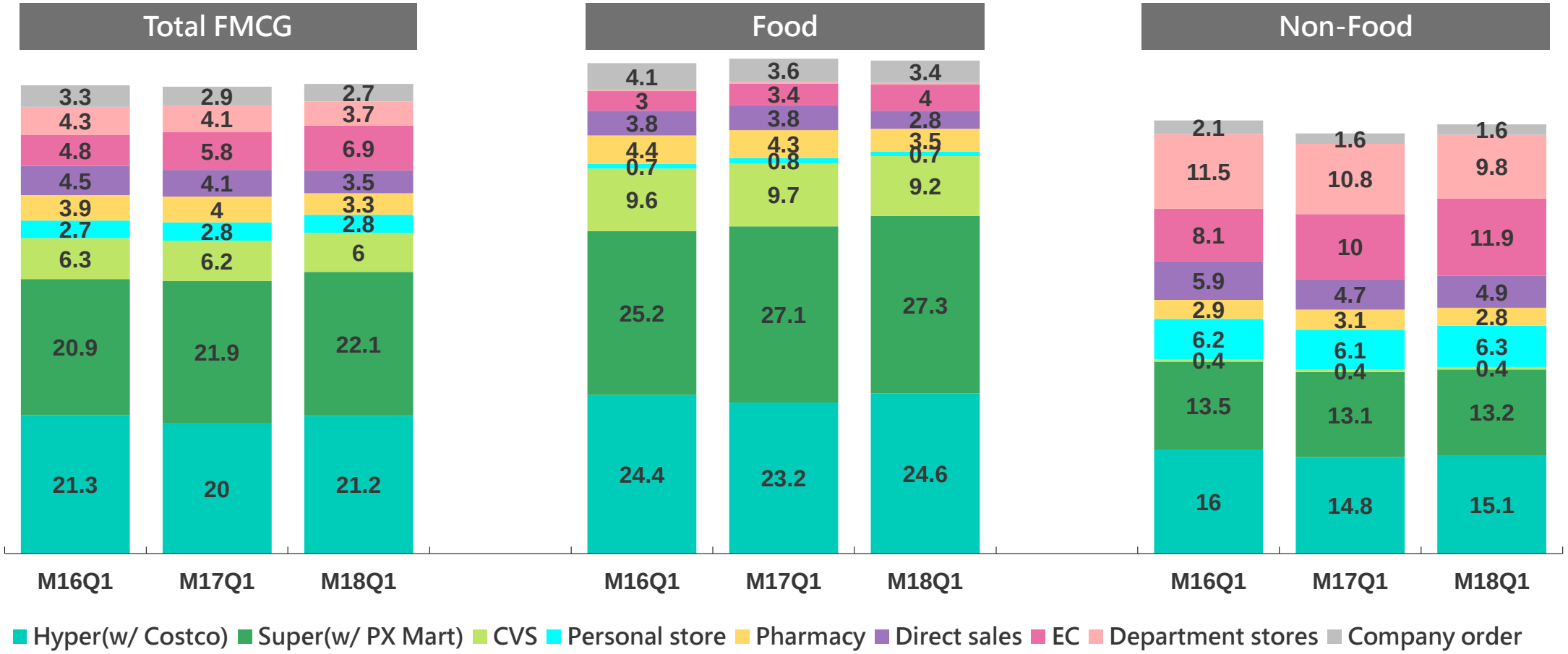
Zombie Buy

Toilet Paper

Data source：Kantar Worldpanel Household panel

Main channel performance in market– sales value %

EC showed strong momentum by appealing more buyers and increasing shopping frequencies, categories like diaper、cooking-related、frozen food、health food、toilet paper and diaper are the driven categories. And Costco also showed no sign of slowing down in FMCG market, especially in cooking-related、frozen food and health food. Super market, on the other hand, performed stagnant.



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