KANTAR WORLDPANEL

Consumer Insights

ASIA Q1 2018

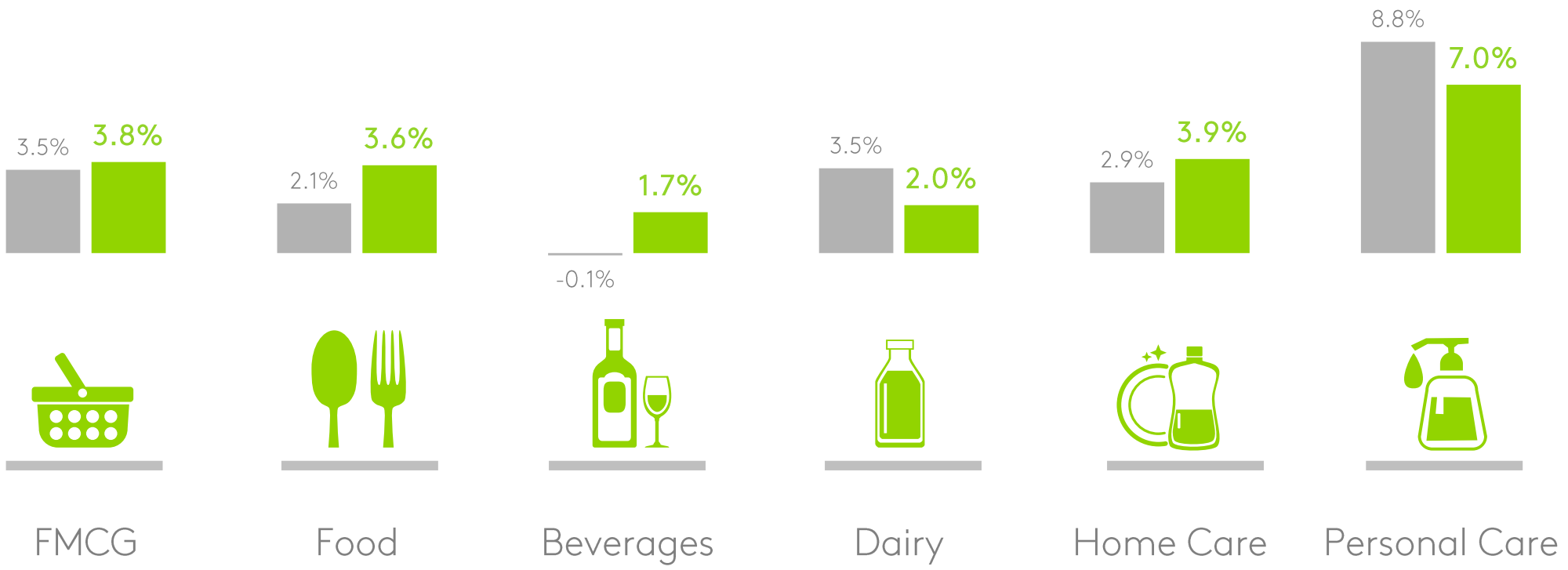
Q1 2018 | SUMMARY ASIA

	Northeast Asia			West Asia		Southeast Asia					
	China	Taiwan	South Korea	India (Urban)	Saudi Arabia	Indonesia	Malaysia	Thailand	Philippines	Vietnam (Urban)	Vietnam (Rural)
FMCG Total	4.2	4.0	4.4	6.4	-7.3	5.5	1.3	0.0	2.2	4.1	4.3
Food	3.2	6.7	5.5	5.7	-11.6	5.7	4.3	1.8	3.3	3.9	0.0
Beverages	1.3	5.8	6.3	4.7	-3.3	5.8	-2.8	-5.6	-3.0	10.9	6.1
Dairy	4.0	4.4	-6.3	35.0	-5.5	2.7	-2.1	-6.6	4.2	-4.4	1.6
Home Care	2.6	7.3	6.7	8.6	-7.4	3.4	1.9	6.5	3.8	7.6	10.9
Personal Care	8.4	0.3	7.1	6.9	-12.8	8.4	0.2	3.5	2.3	11.5	13.0

Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

% Value Change FMCG – MAT Q1 2018 vs. Year Ago

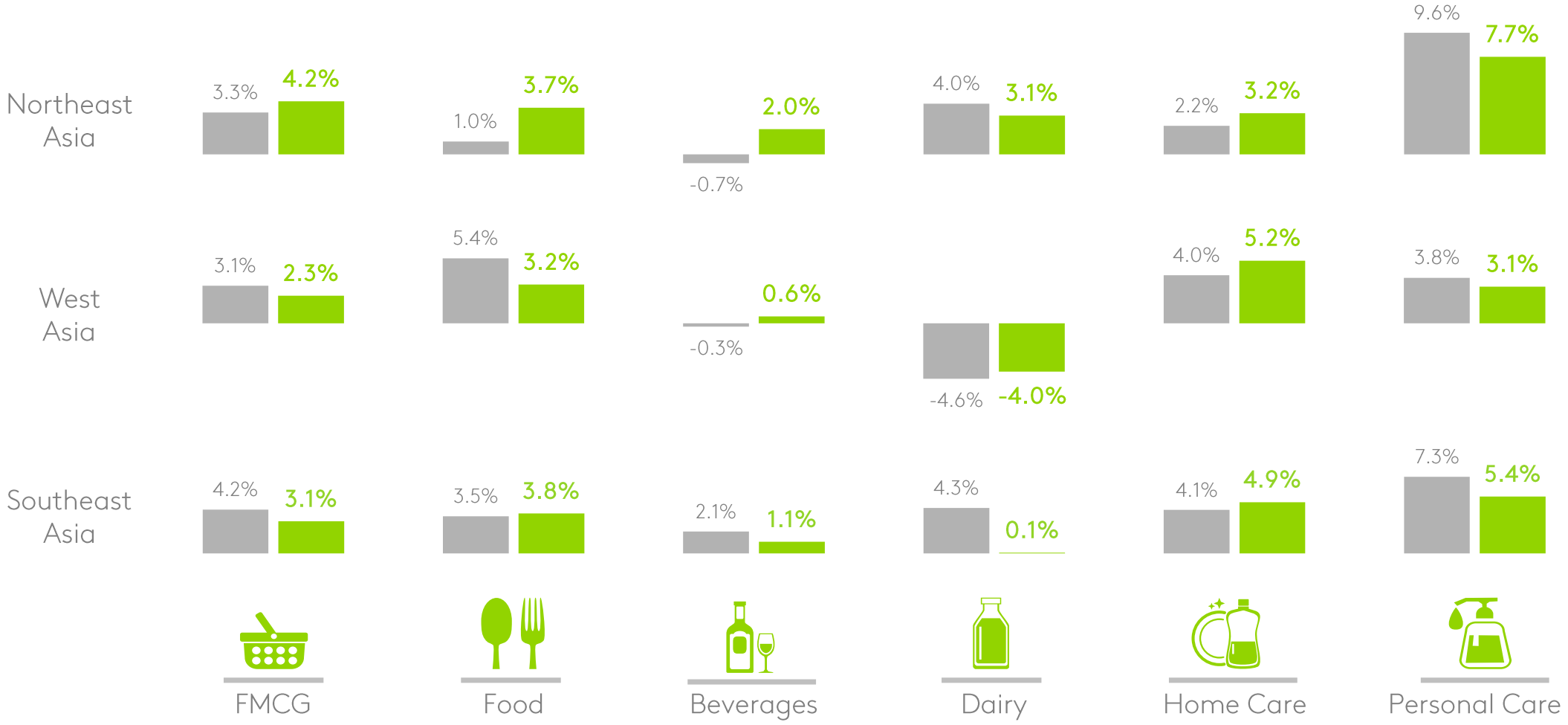
FMCG GROWTH IN ASIA : YOY



ASIA / MAT – VALUE SPEND GROWTH

■ Q1'17 vs Q1'16 ■ Q1'18 vs Q1'17

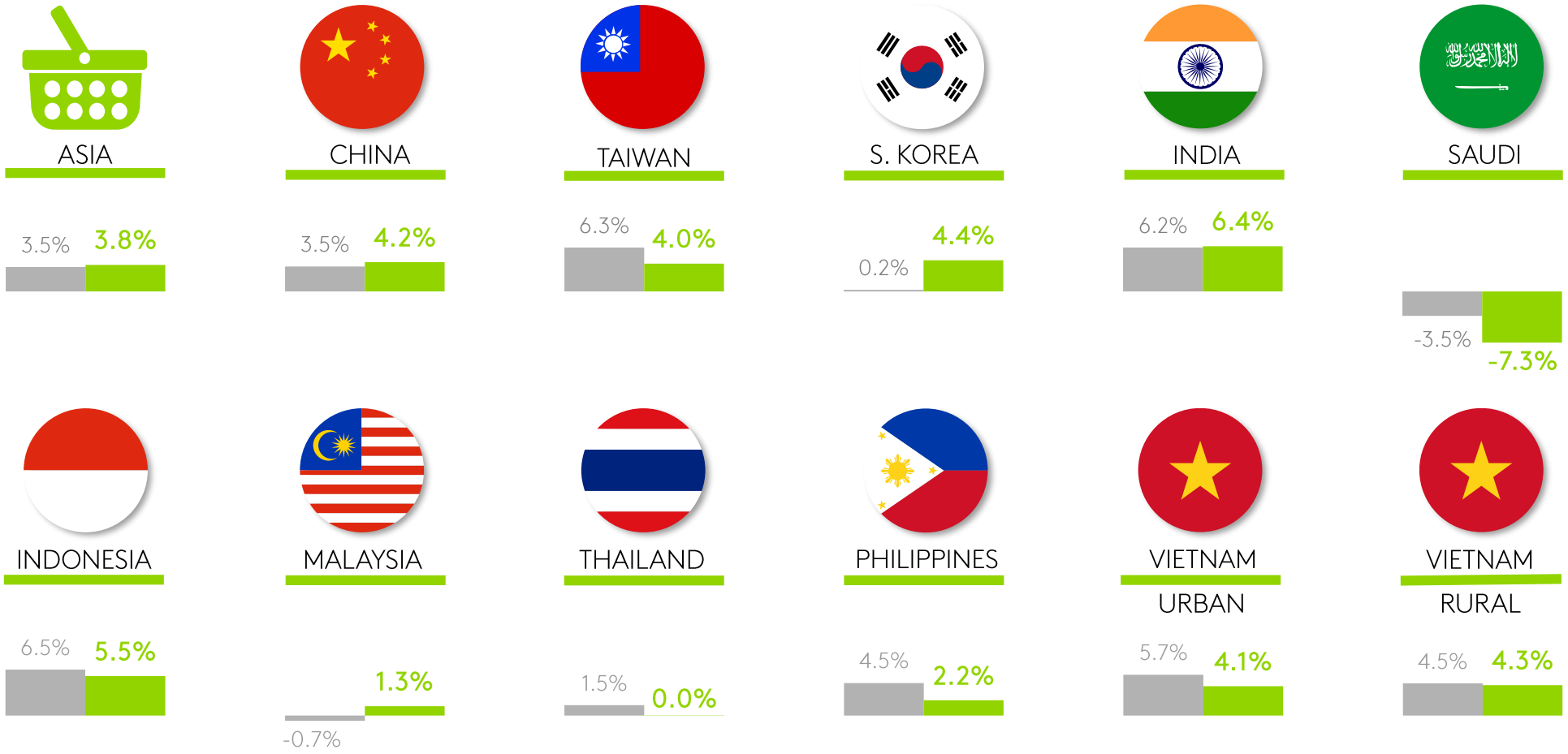
FMCG GROWTH IN ASIA : YOY



ASIA / MAT – VALUE SPEND GROWTH

Q1'17 vs Q1'16 Q1'18 vs Q1'17

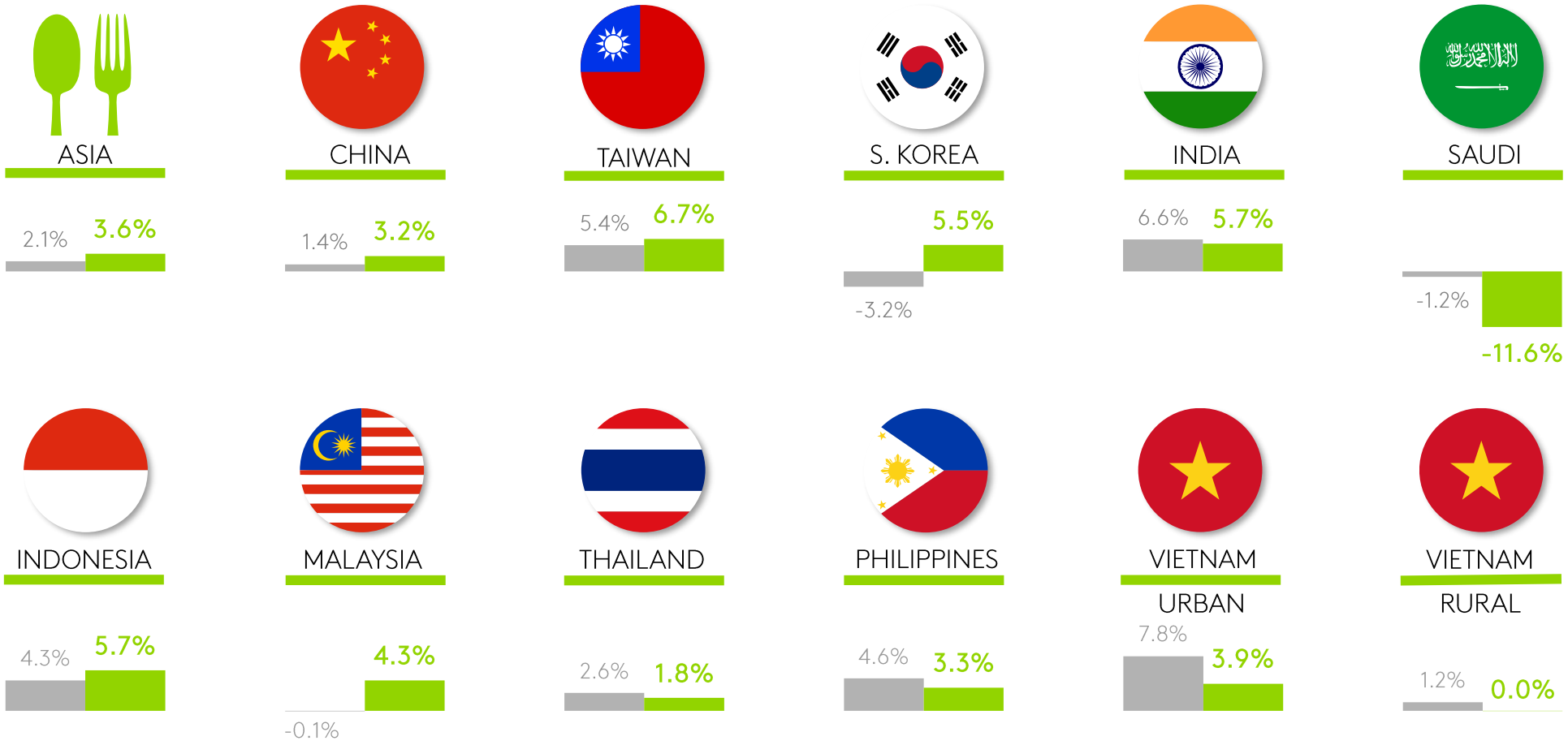
FMCG: Positive outlook for Asian markets in overall, with India posted stellar growth, followed by Indonesia.



ASIA / MAT Q1 2018 – Value Growth FMCG

Q1'17 vs Q1'16 Q1'18 vs Q1'17

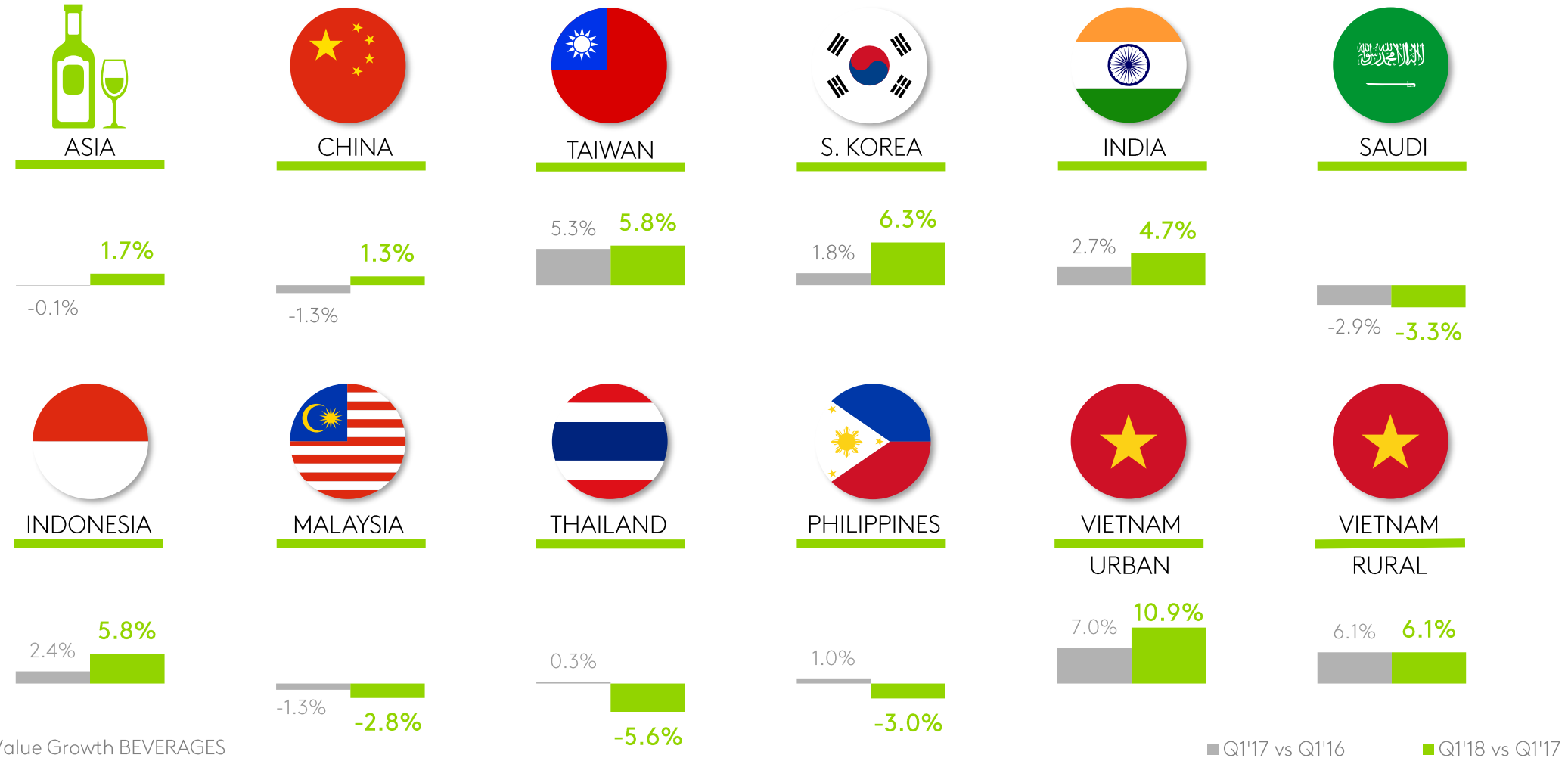
FOOD: Cooking categories for example noodles, sauce, frozen food are driving the growth



ASIA / MAT Q1 2018 – Value Growth FOOD

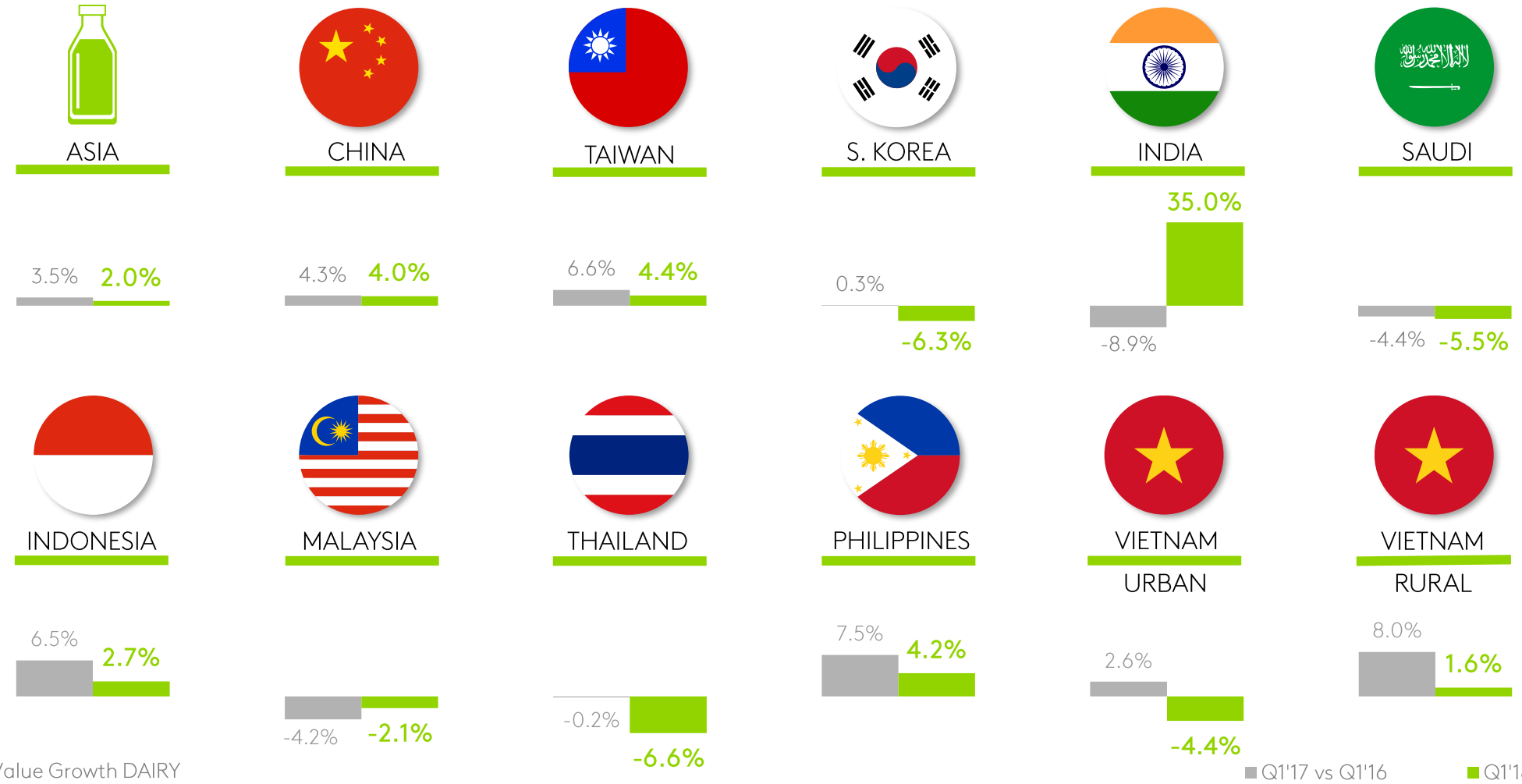
Q1'17 vs Q1'16 Q1'18 vs Q1'17

BEVERAGES: Started to show positive growth; NPD is required to continually drive growth



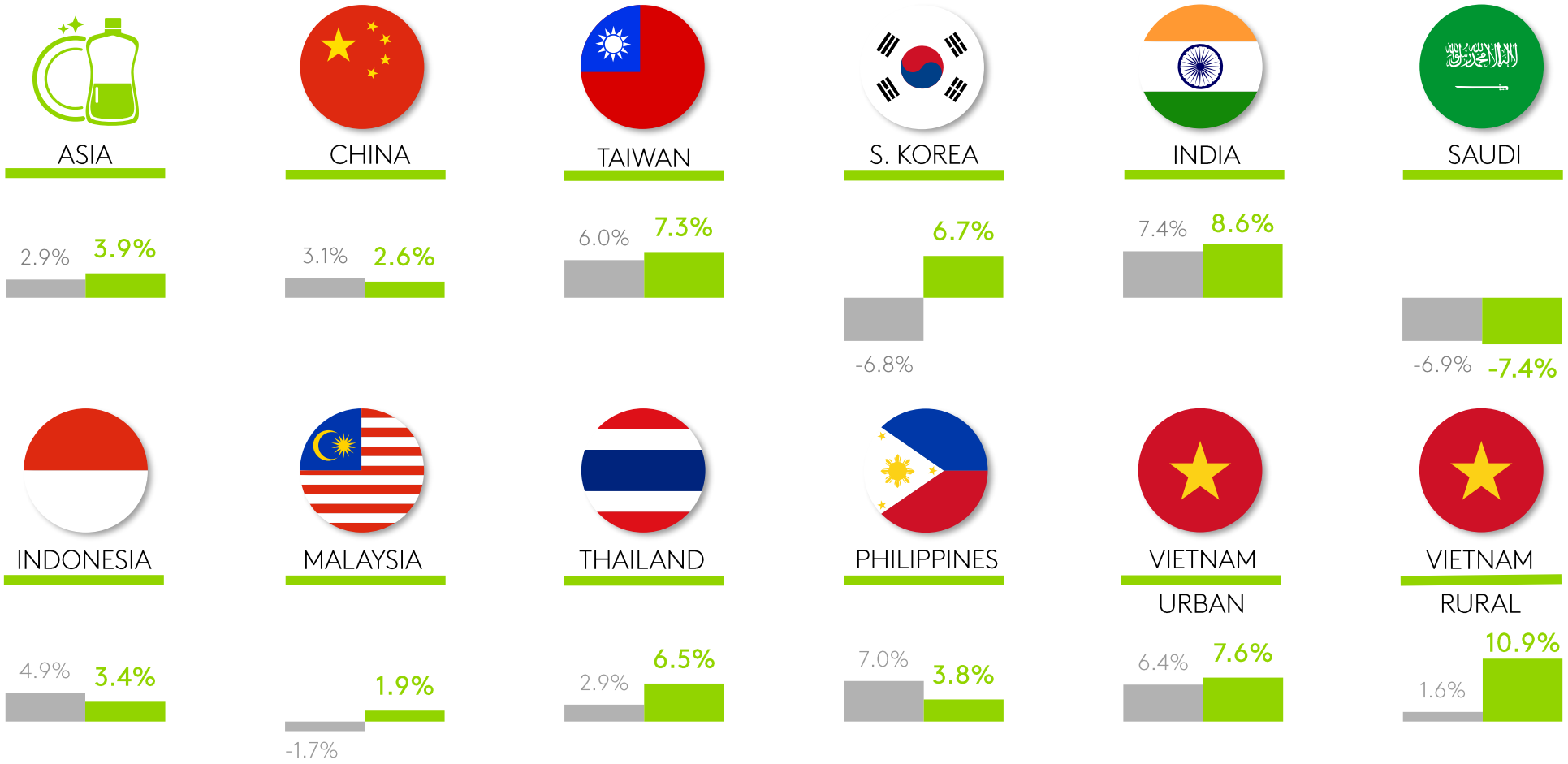
ASIA / MAT Q1 2018 – Value Growth BEVERAGES

DAIRY: Indian consumption trend is still evolving; investment and marketing initiatives remained key reasons for this value growth



ASIA / MAT Q1 2018 – Value Growth DAIRY

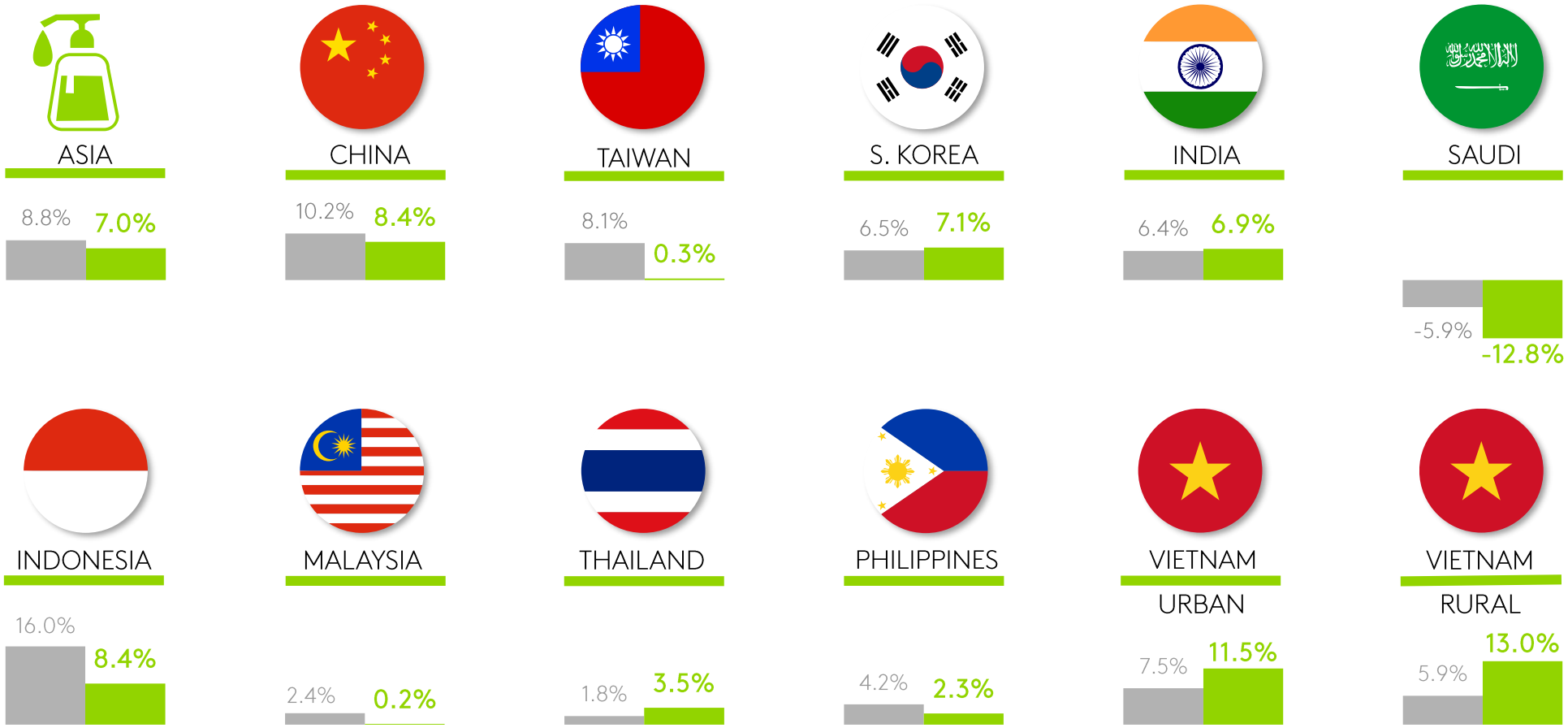
HOME CARE: Registered stronger growth in Q1 2018; improved living standard emphasizes home hygiene and cleanliness awareness



ASIA / MAT Q1 2018 – Value Growth HOME CARE

Q1'17 vs Q1'16 Q1'18 vs Q1'17

PERSONAL CARE: Self appearance is still important to consumers; remained the strongest sector in FMCG



ASIA / MAT Q1 2018 – Value Growth PERSONAL CARE

Q1'17 vs Q1'16 Q1'18 vs Q1'17

MAT Q1 2018 | SUMMARY ASIA

CHINA

#RemainResilient China's GDP grew by 6.8% in Q1 2018 which is consistent with the last two quarters in 2017. FMCG market grew up to 4.2%, compared to 3.5% in Q1 2017.

#TheKingOfBeans Soybean milk is the fastest growing category in Q1 2018. Health awareness of this dairy alternative might be one of the key factors for this growth.

#Click-to-Brick E-commerce players like Tmall and JD are now seeking opportunities to reinvent traditional trade, turning to small format stores and grocery stores.

TAIWAN

#SlowingMomentum Stock market is good, GDP stands around 3% since 17H2. Overall, economy in Q1 18 slightly down turned from 17Q4.

#InnovativeBeverages Innovation heats up beverage markets. On top of coffee fashion, more beverage NPD launched this year, ready for upcoming summer.

#ToiletPaperPanic News reports say manufacturers will reflect cost up on toilet paper price by up to 30%. In March, consumer rushed for panic storage that wiped out all goods in stores.

S.KOREA

#DownbeatConsumers CSI has dropped and hit a one-year low in April, due mainly to potential US-China trade row and appreciation of local currency.

#Meconomy A compound word of Me + Economy. Retailers are aiming on this trend and releasing a variety of products to fulfill consumers' satisfaction and happiness.

#Anti-pollution Amid deteriorating air quality caused by fine dust, skin health is of growing importance. Anti-pollution cosmetics emerged as rising trend to prevent or filter out fine dust particles from one's skin.

MAT Q1 2018 | SUMMARY ASIA

INDIA

#RuralFocus Government plans to raise expenditure in agricultural sector and rural areas through various proposals - results in more disposable income with rural folk, boosting consumption in these areas

#QualityLifestyle With change in lifestyles, shopping at modern retail has increased significantly leading to increase in trips and average spends.

#RosyOutlook A continuous growth trend in the purchase basket is observed across all socio economic groups, after demonetisation and GST roll-out in 2017.

SAUDI ARABIA

#WeakSentiment Saudi Arabian shoppers are increasingly conscious of their purchases. Only 4 categories are growing in penetration and 2 are growing in frequency as of 12 months ending Q1 2018 vs. same period last year.

#ValueSeeking Consumers are now preferring cheaper channels like wholesale over Modern Trade. They are finding ways to spend less and save more.

#PromoHurt Categories are getting devalued due to deep and frequent discounts. Manufacturers have to identify the right price point and drive the right promotion.

INDONESIA

#StrongFMCG Indonesia's growth pace in Q1 fell slightly from the previous quarter, Indonesia continues FMCG growth amidst decelerating economic growth

#HigherTripSize Along with F&B, consumers increase their trip size across segments, especially for personal care sectors.

#BeautyOpportunity Beauty segment enjoys strong growth in Indonesia as Indonesians become increasingly aware of their appearance. This provides ample growth opportunity.

MAT Q1 2018 | SUMMARY ASIA

MALAYSIA

#ConfidenceRestoring GDP is back in the high zone and consumers have become a little more confident but remain pessimistic for the last 5 years.

#RationalShopper Malaysians are being more pragmatic in their shopping, progressively dropping non-essential categories out of their repertoire.

#CautiousSpending Malaysians are being more cautious with their spending on essential purchases – buying less frequently in larger bulks as well as engaging more with promotions.

THAILAND

#RecoverySign In Q1 2018, GDP grew at the fastest pace for 5 years. Short-term upturn for FMCG spend in Rural and traditional trade.

#ConvenienceHeat Continued long-term growth for CVS channel through store expansion and increased spend.

#ExcitementNeed Beverage consumption continues to shrink nationwide. Constant innovation needed for this excitement need and hence growth in this sector.

PHILIPPINES

#BetterThanBefore PH economy grew by 6.8%, a bit higher than last year's growth at 6.4%. Strong government and household consumption drove this growth in Q1.

#OutOfRich Upper income homes are lessening their purchases, which may be attributed to higher allocation to out-of-home consumption

#HighlyCultured Yoghurt Drink continues to gain importance among consumers' baskets as the top category in terms of value.

VIETNAM

#StrongEconomy The Vietnam's GDP in Q1 posts strong performance, the highest growth rate over the past ten years, coupled with low CPI.

#Non-foodDevelopment Home care and personal care continue to outperform Food & Beverages from smaller base thanks to higher living standards.

#AShifttoModern Minimarket/convenience stores and online formats continuously expand their reach. Consumers are shifting towards to Modern Stores for greater convenience and diversity of choices.

Top 5 Categories with Positive Impact – MAT Q1'18 vs Q1'17

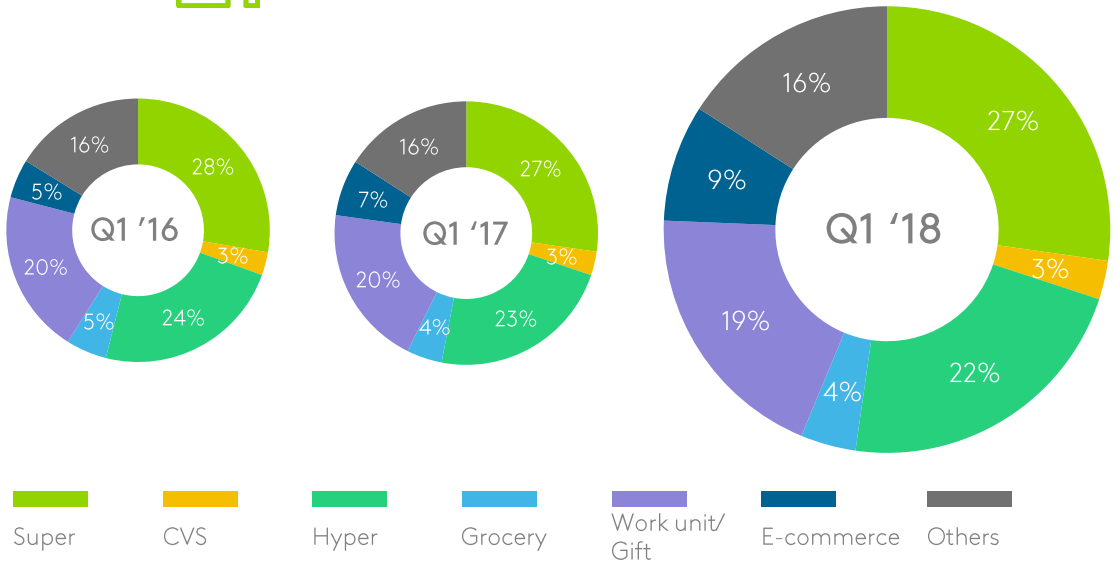
Value	Volume	Penetration
Soybean Milk	Soybean Milk	Soybean Milk
Mouthwash	Kitchen Rolls	Oyster Sauce
Bleach	Mouthwash	Nutrient Supplement
Oyster Sauce	Wet Tissues	Hand Wash
Kitchen Rolls	Oyster Sauce	Ice Cream

% Change FMCG Basket per Social Economic Level

MAT	Q2'17 VS Year Ago	Q4'17 VS Year Ago	Q4'17 VS Year Ago	Q1'18 VS Year Ago
Total	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%
Low Income	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%
Mid Income	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth ≤ -0.5%
High Income	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%

Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

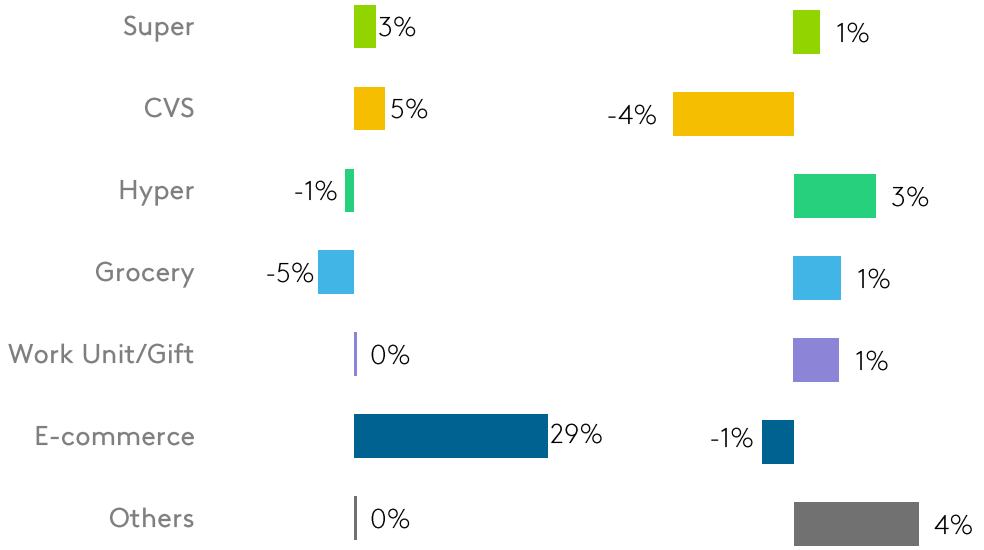
Channel Importance - %Value



MAT Q1'18 v Q1'17

Shopping Occasions

Spend/Trip



TAIWAN

Top 5 Categories with Positive Impact – MAT Q1'18 vs Q1'17

Value	Volume	Penetration
Ice-Cream	Vacuum packed coffee	Ice-Cream
Vacuum packed coffee	Ice-Cream	Vacuum packed coffee
Preserves / Spreads	Dried/Instant Noodles	RTE Breakfast Cereal
Frozen Food	Preserves / Spreads	Preserves / Spreads
Dried/Instant Noodles	Lipstick	Seasoning / Fish / Frying Sauce

% Change FMCG Basket per Social Economic Level

MAT	Q2'17 VS Year Ago	Q3'17 VS Year Ago	Q4'17 VS Year Ago	Q1'18 VS Year Ago
Total	Growth > 5%	Growth > 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%
Low Income	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	Growth ≤ -0.5%	Growth ≤ -0.5%
Mid Income	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%
High Income	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%

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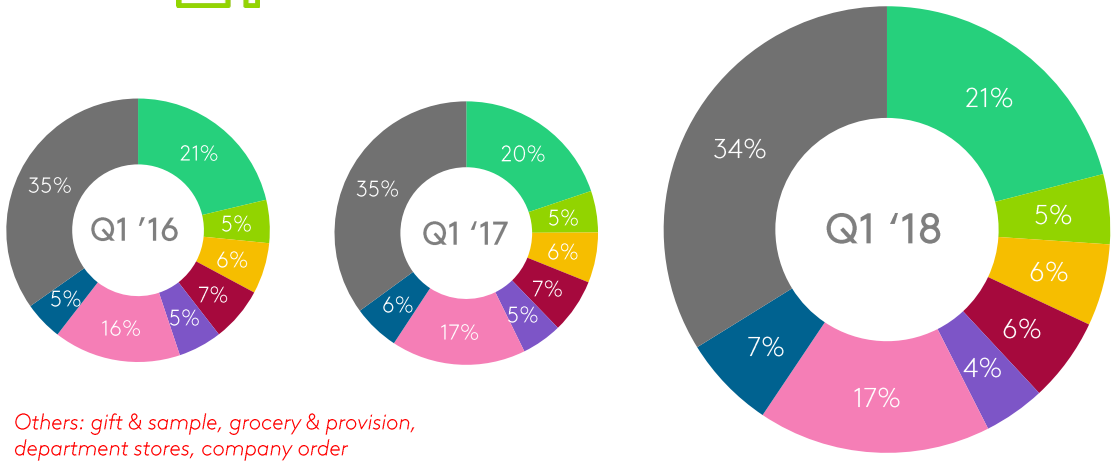
Channel Importance - %Value



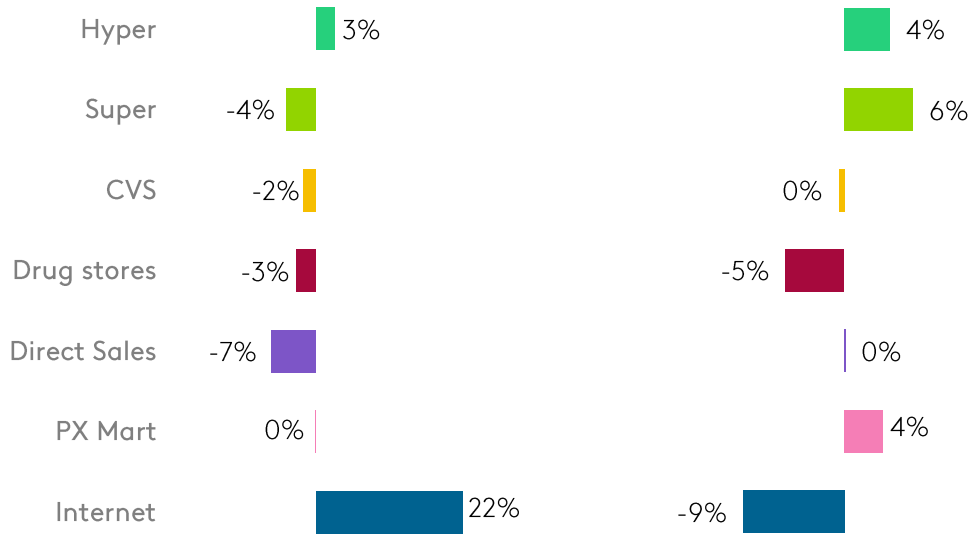
Others: gift & sample, grocery & provision, department stores, company order

Hyper | Super | CVS | Drug Stores | Direct Sales | PX Mart | Internet | Others

MAT Q1'18 v Q1'17

Shopping Occasions

Spend/Trip



Top 5 Categories with Positive Impact – MAT Q1'18 vs Q1'17

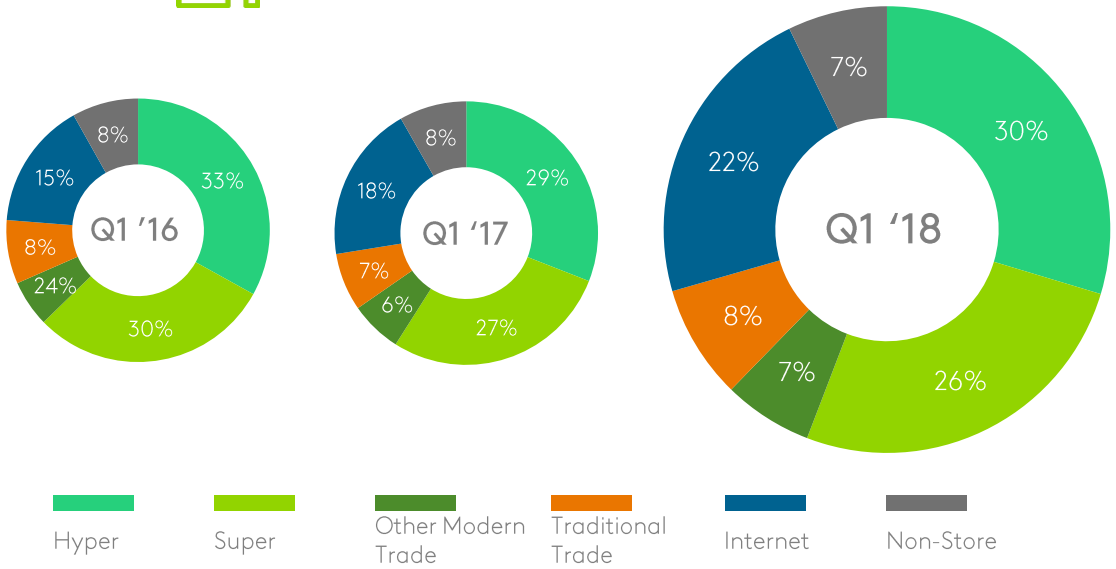
Value	Volume	Penetration
Retort	Foundation	Foundation
Foundation	Retort	Retort
Frozen prepared Food	Frozen prepared Food	Frozen prepared Food
Hair Treatment	Sport Drink	Cream
Sport Drink	Water	Body Moisture

% Change FMCG Basket per Social Economic Level

MAT	Q2'17 VS Year Ago	Q3'17 VS Year Ago	Q4'17 VS Year Ago	Q1'18 VS Year Ago
Total	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%
Low Income	Growth > 5%	Growth > 5%	-0.5% < Growth ≤ 5%	Growth > 5%
Mid Income	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	Growth ≤ -0.5%
Mid-High Income	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	Growth > 5%
High Income	Growth ≤ -0.5%	-0.5% < Growth ≤ 5%	Growth > 5%	Growth > 5%

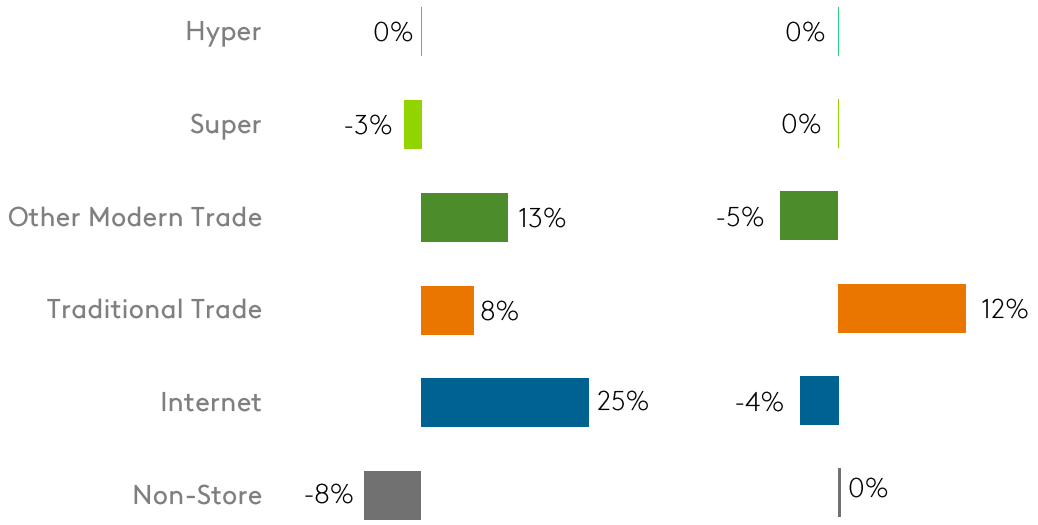
Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

Channel Importance - %Value



MAT Q1'18 v Q1'17

Shopping Occasions / Spend/Trip



Top 5 Categories with Positive Impact – MAT Q1'18 vs Q1'17

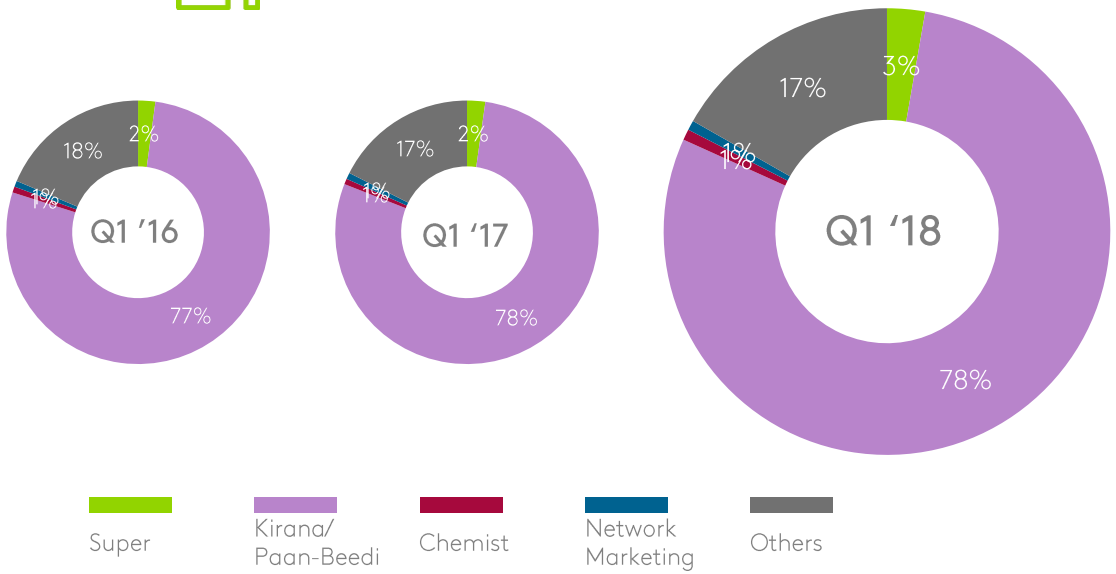
Value	Volume	Penetration
Sanitary Products	Toilet/Bath. Cleaner	Toilet/Bath. Cleaner
Toilet/Bath. Cleaner	Noodle/Macaroni	Coffee
Noodle/Macaroni	Sanitary Products	Noodle/Macaroni
Pre/Post Fabric Wash	Toothbrush	Sauces/Ketchup
Toothbrush	Sauces/Ketchup	Toothbrush

% Change FMCG Basket per Social Economic Level

MAT	Q2'17 VS Year Ago	Q3'17 VS Year Ago	Q4'17 VS Year Ago	Q1'18 VS Year Ago
Total SEC	●	●	●	●
SEC AB	●	●	●	●
SEC C	●	●	●	●
SEC D/E	●	●	●	●

● Growth ≤ -0.5% ● -0.5% < Growth ≤ 5% ● Growth > 5%

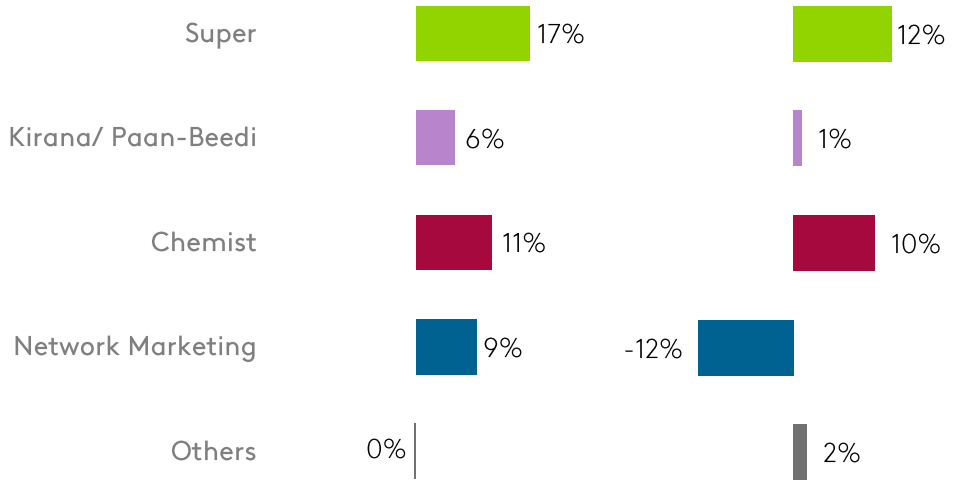
Channel Importance - %Value



MAT Q1'18 v Q1'17

Shopping Occasions

Spend/Trip



SAUDI ARABIA

Top 5 Categories with Positive Impact – MAT Q1'18 vs Q1'17

Value	Volume	Penetration
Bottled Water	Dry Tissue	Evaporated Milk
	Bottled Water	Fresh Plain Milk

% Change FMCG Basket per Social Economic Level

MAT	Q2'17 VS Year Ago	Q3'17 VS Year Ago	Q4'17 VS Year Ago	Q1'18 VS Year Ago
Total SEC				
SEC AB				
SEC C				
SEC D				

Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

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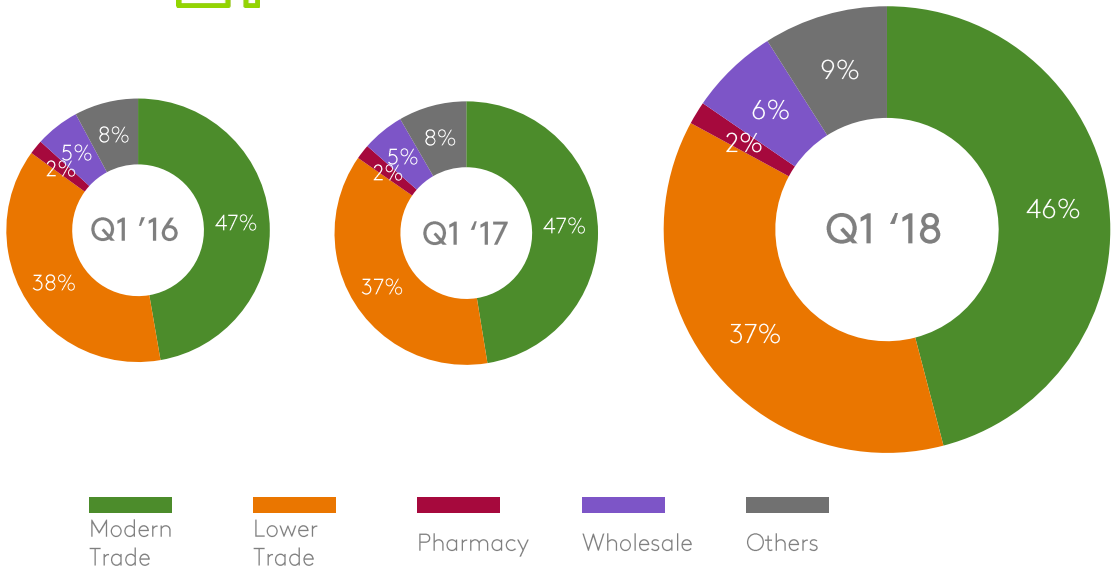
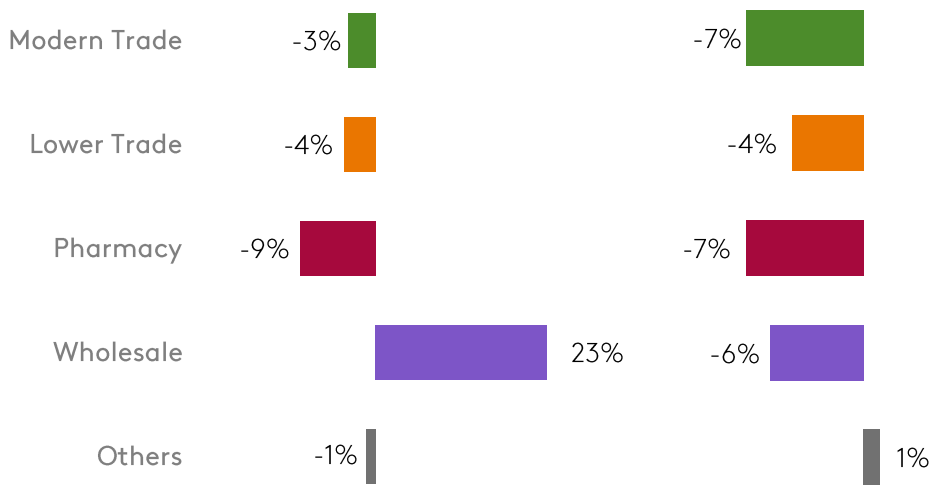


MAT Q1'18 v Q1'17

Shopping Occasions

Spend/Trip



INDONESIA

Top 5 Categories with Positive Impact – MAT Q1'18 vs Q1'17

Value	Volume	Penetration
RTD Coffee	Confectionery/Candy	Cold Cereal/Cereal Bar
Cold Cereal/Cereal Bar	RTD Coffee	RTD Coffee
Facial Tissue	Cold Cereal/Cereal Bar	Confectionary/Candy
Facial Cosmetic	Bleacher	Facial Tissue
Mineral Water	Facial Moisturizer	Facial Moisturizer

% Change FMCG Basket per Social Economic Level

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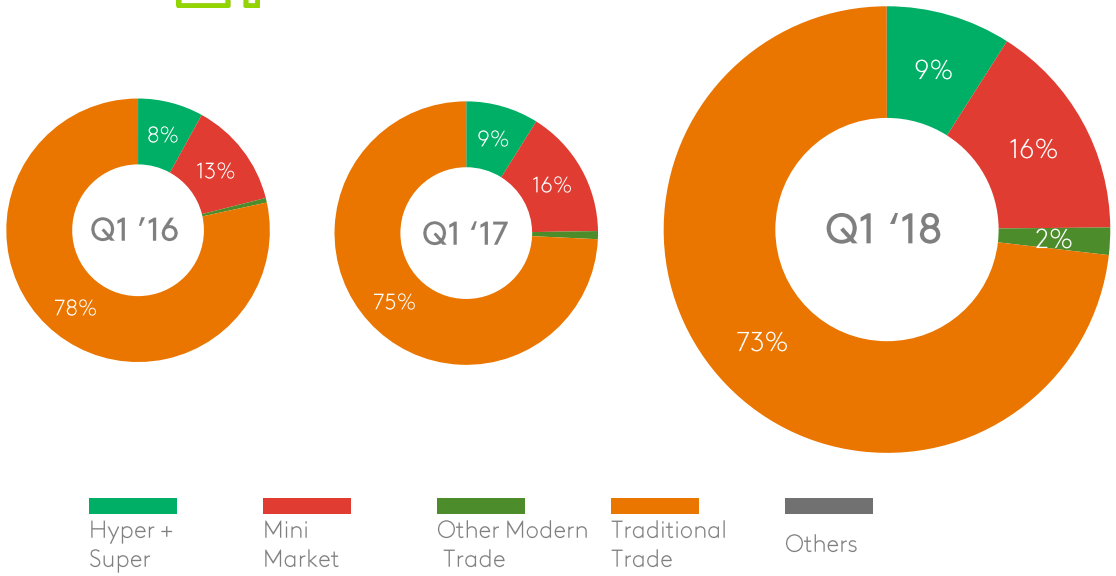
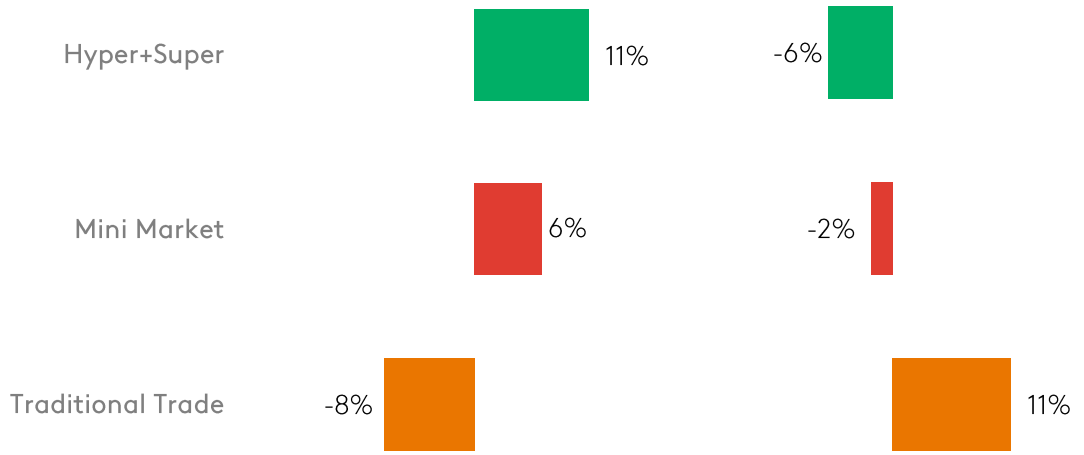


MAT Q1'18 v Q1'17

Shopping Occasions

Spend/Trip



Top 5 Categories with Positive Impact – MAT Q1'18 vs Q1'17

Value	Volume	Penetration
Coconut Milk	MSG	Spaghetti
MSG	Face Moisturizers	MSG
Chocolate	Chocolate	Coconut Milk
Snacks	Snacks	Cereal Beverage
Cooking Oils	Liquid Detergent	Air Freshener

% Change FMCG Basket per Social Economic Level

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High Income	Growth > 5%	Growth > 5%	Growth > 5%	Growth ≤ -0.5%

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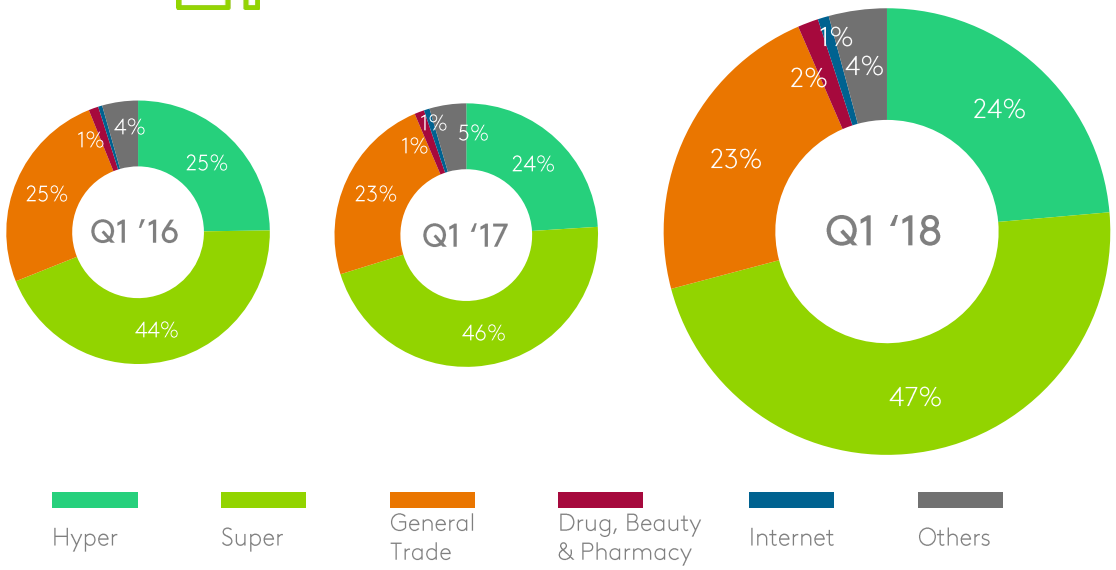
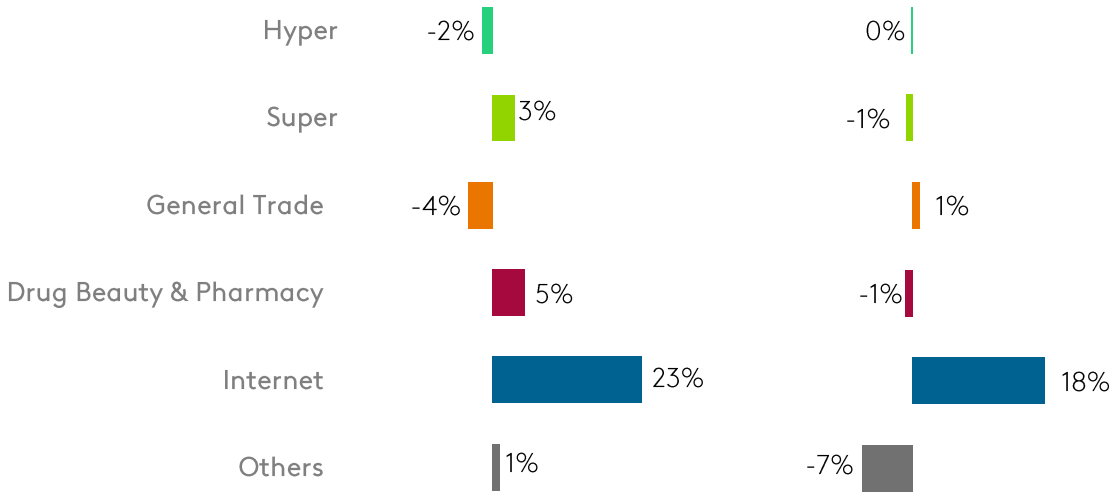


MAT Q1'18 v Q1'17

Shopping Occasions

Spend/Trip



THAILAND

Top 5 Categories with Positive Impact – MAT Q1'18 vs Q1'17

Value	Volume	Penetration
Sun Protection	Sun Protection	Condensed Milk
Insect Control	Cooking Oil	Household Cleaner
Fabric Softener	Hand & Body Moist	Insect Control
Make Up	Instant TFD	Hand & Body Moist
Instant TFD	RTD TFD	Fabric Softener

% Change FMCG Basket per Social Economic Level

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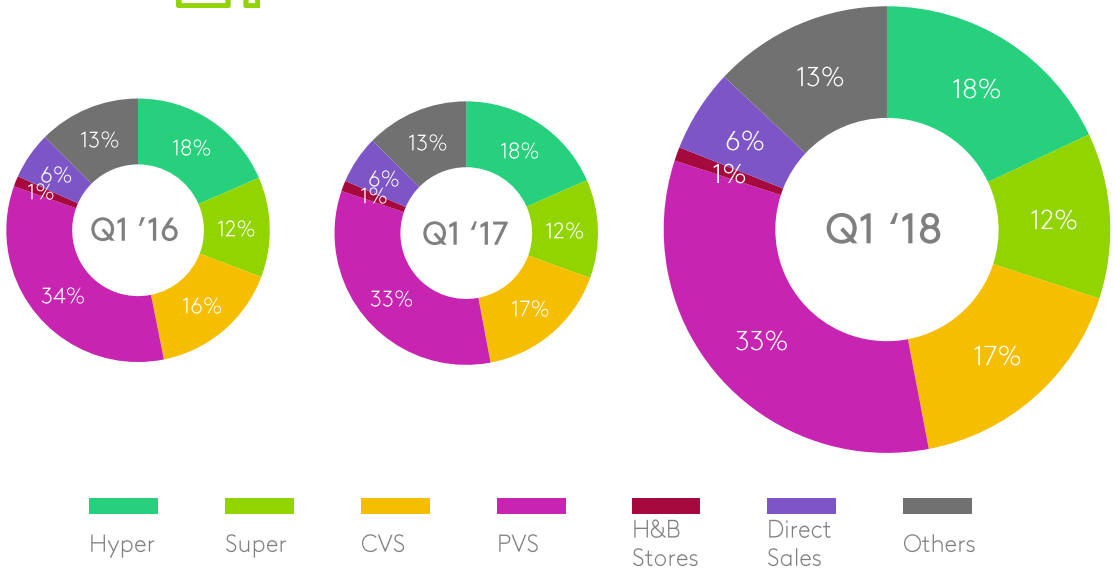
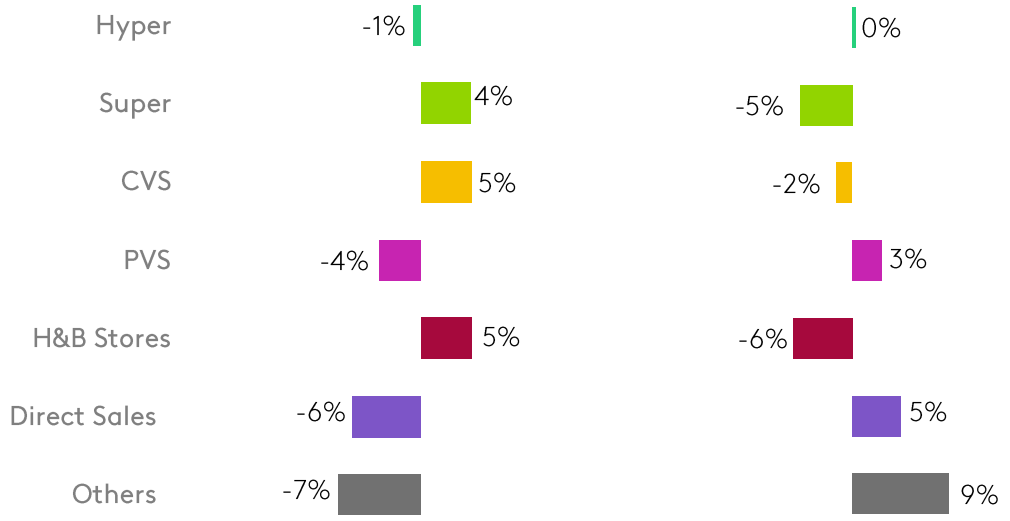
Channel Importance - %Value



MAT Q1'18 v Q1'17

Shopping Occasions

Spend/Trip



PHILIPPINES

Top 5 Categories with Positive Impact – MAT Q1'18 vs Q1'17

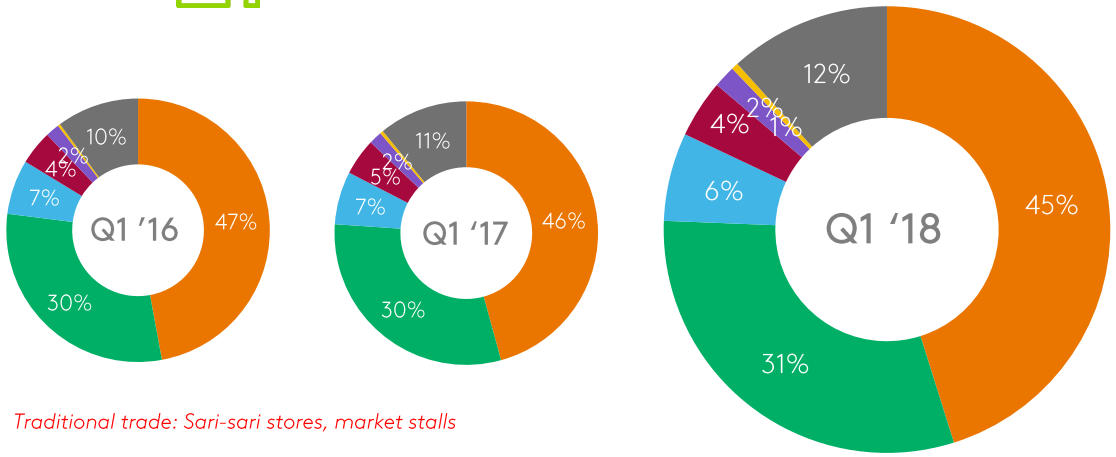
Value	Volume	Penetration
Yoghurt Drink	Semi-Processed Meat	Oyster Sauce
Semi-Processed Meat	Yoghurt Drink	Yoghurt Drink
Breads	Dishwash	Scouring Pads
Processed Meat	Scouring Pads	Semi-Processed Meat
Cultured Milk	Cultured Milk	All Purpose Cream

% Change FMCG Basket per Social Economic Level

MAT	Q2'17 VS Year Ago	Q3'17 VS Year Ago	Q4'17 VS Year Ago	Q1'18 VS Year Ago
Total	Yellow	Yellow	Yellow	Yellow
SEC E	Yellow	Yellow	Yellow	Yellow
SEC D	Yellow	Yellow	Yellow	Yellow
SEC ABC	Yellow	Grey	Grey	Grey

Grey: Growth ≤ -0.5% · Yellow: -0.5% < Growth ≤ 5% · Green: Growth > 5%

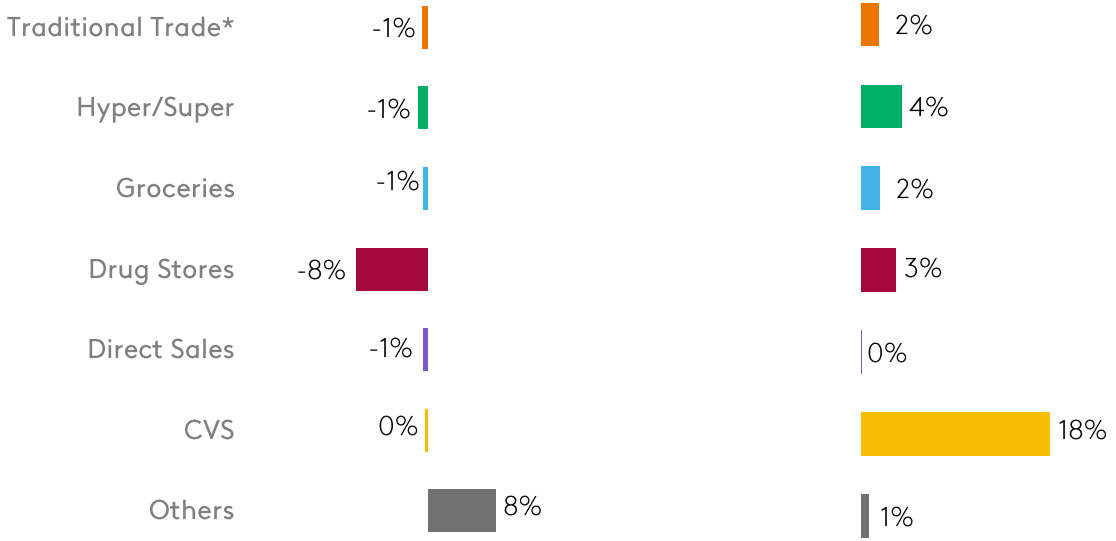
Channel Importance - %Value



Traditional trade: Sari-sari stores, market stalls

Traditional Trade* · Hyper/Super · Groceries · Drug Stores · Direct Sales · CVS · Others

MAT Q1'18 v Q1'17



VIETNAM URBAN

Top 5 Categories with Positive Impact – MAT Q1'18 vs Q1'17

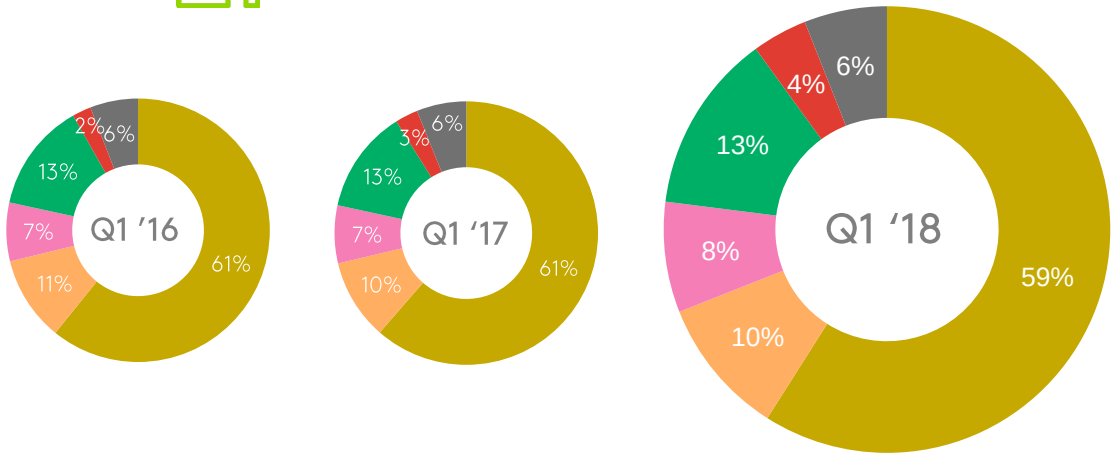
Value	Volume	Penetration
Sun Protection	Liquid Detergent	Cakes
Lipstick	Sun Protection	Soya Milk
Liquid Detergent	Body Care	Liquid Detergent
Body Care	RTD GUM	Box Tissue
Facial Moisturizer	Liquid Tonic Food Drink	Energy Drink

% Change FMCG Basket per Social Economic Level

MAT	Q2'17 VS Year Ago	Q3'17 VS Year Ago	Q4'17 VS Year Ago	Q1'18 VS Year Ago
Total	Yellow	Yellow	Green	Yellow
Low Income	Grey	Grey	Grey	Grey
Mid Income	Yellow	Yellow	Yellow	Green
Mid-High Income	Green	Green	Green	Green
High Income	Green	Green	Green	Green

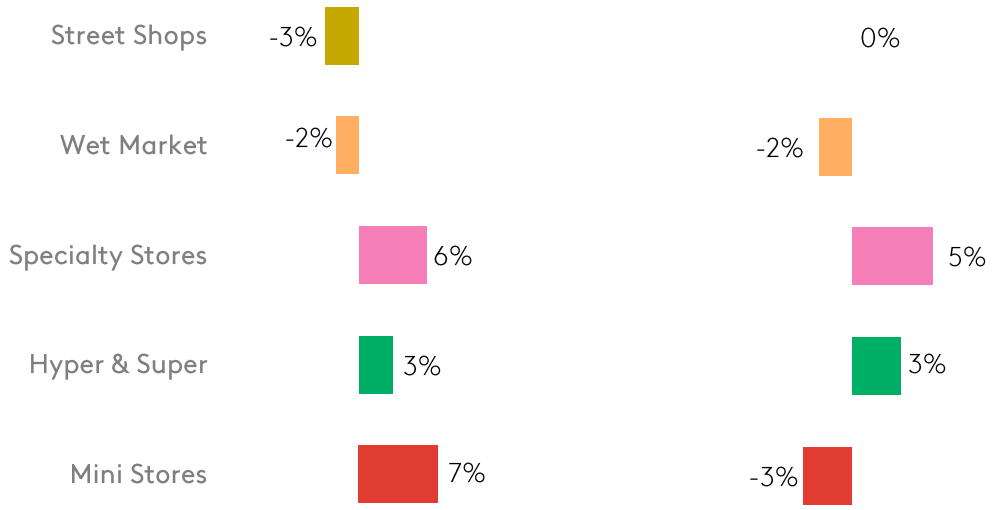
Grey: Growth ≤ -0.5% | Yellow: -0.5% < Growth ≤ 5% | Green: Growth > 5%

Channel Importance - %Value



MAT Q1'18 v Q1'17

Shopping Occasions / Spend/Trip



VIETNAM RURAL

Top 5 Categories with Positive Impact – MAT Q1'18 vs Q1'17

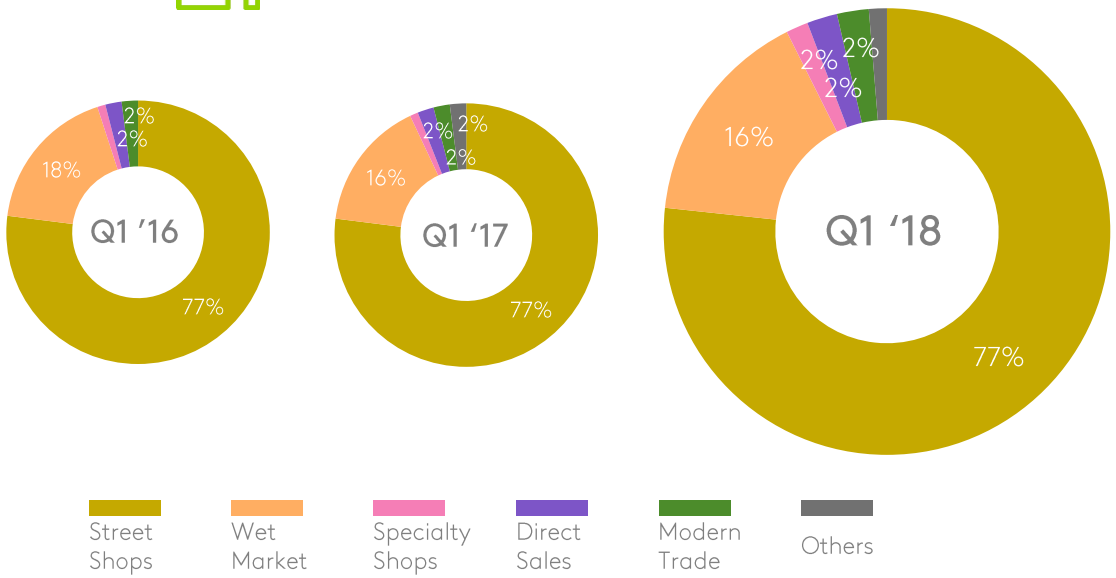
Value	Volume	Penetration
Liquid Detergent	Liquid Detergent	Liquid Detergent
Liquid Tonic Food Drink	Liquid Tonic Food Drink	Liquid Tonic Food Drink
Fruit Juice	Fruit Juice	Floor Cleaner
Floor Cleaner	RTD GUM	Soya Milk
Baby Diaper	Chili Sauce	Fruit Juice

% Change FMCG Basket per Social Economic Level

MAT	Q2'17 VS Year Ago	Q3'17 VS Year Ago	Q4'17 VS Year Ago	Q1'18 VS Year Ago
Total	Yellow	Yellow	Yellow	Yellow
Low Income	Grey	Grey	Grey	Grey
Mid Income	Grey	Grey	Grey	Grey
Mid-High Income	Green	Green	Green	Green
High Income	Green	Green	Green	Green

Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

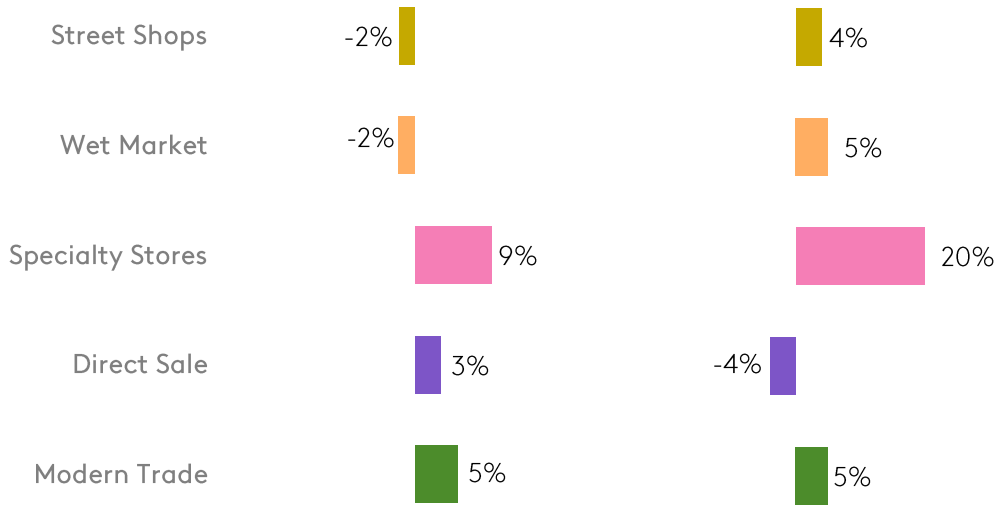
Channel Importance - %Value



MAT Q1'18 v Q1'17

Shopping Occasions

Spend/Trip



KANTAR WORLDPANEL