KANTAR WORLDPANEL

台灣民生消費品市場趨勢

2018年第四季

資料來源：凱度消費者指數 家戶指數

Objectives

> Through FMCG Monitor, Kantar Worldpanel Taiwan aims to provide a brief overview of Taiwan FMCG market and its evolution across sectors and channels as well as the most updated highlights. With this report, we follow trends, compiling market information and latest movements monthly and provide an integrated view of Taiwan FMCG market.

Methodology

> Kantar Worldpanel collected purchase record weekly (paper) or daily (digital) from the sampled consumers across the country and continuously track their purchase behavior of FMCG products. The panel is composed by the panelists who represent 98% of households/population in Taiwan island wide.

> We offered different panel for different product sectors, mainly including the Worldpanel Household (N=2,500 households), Worldpanel Health Food (N=4,500 households), Worldpanel Beauty (N=5,000 females), Worldpanel Baby (N=1,300 mothers), Worldpanel Beverage (N=6,500 individuals).

> The data in the FMCG Monitor report is sourced from Worldpanel Household.

> Category coverage: Packaged Foods, Beverage, Dairy, Home Care and Personal Care.

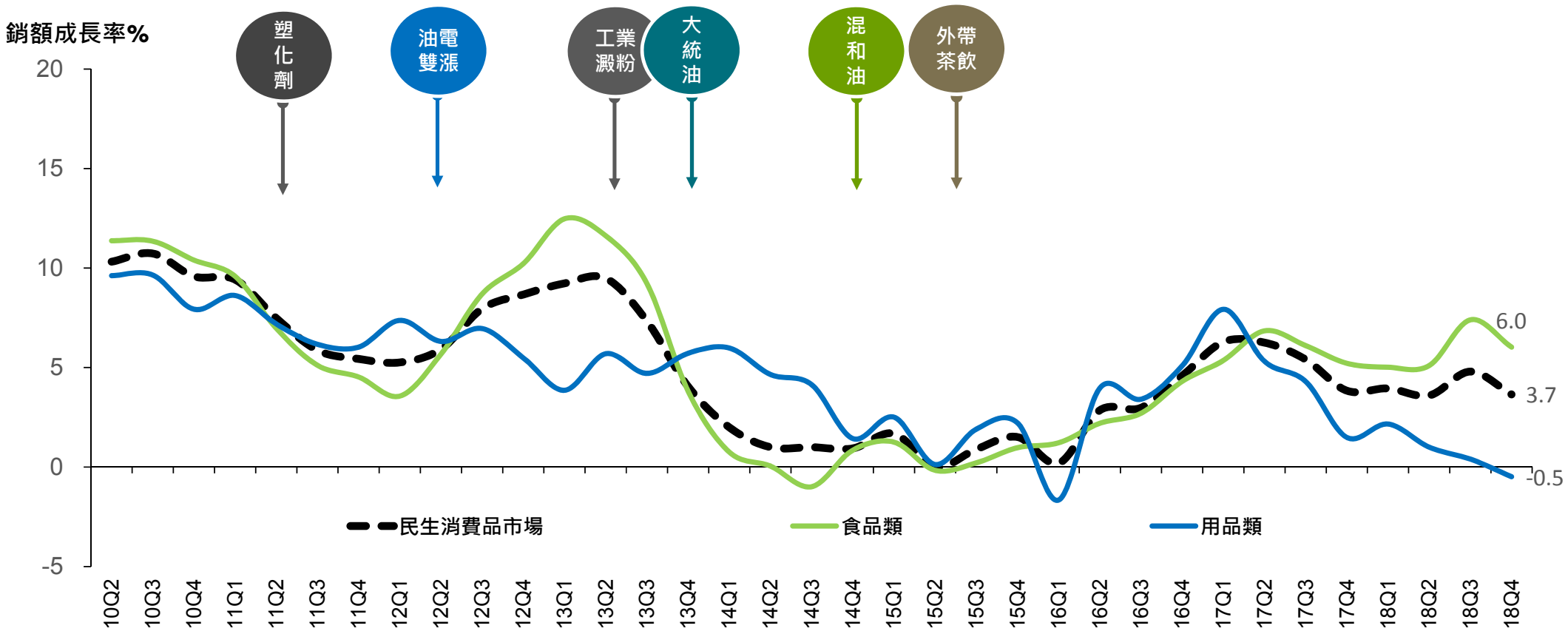
2018 第四季 主要經濟指數 KEY INDICATORS

2018 FY：2.6%

資料來源：行政院主計總處

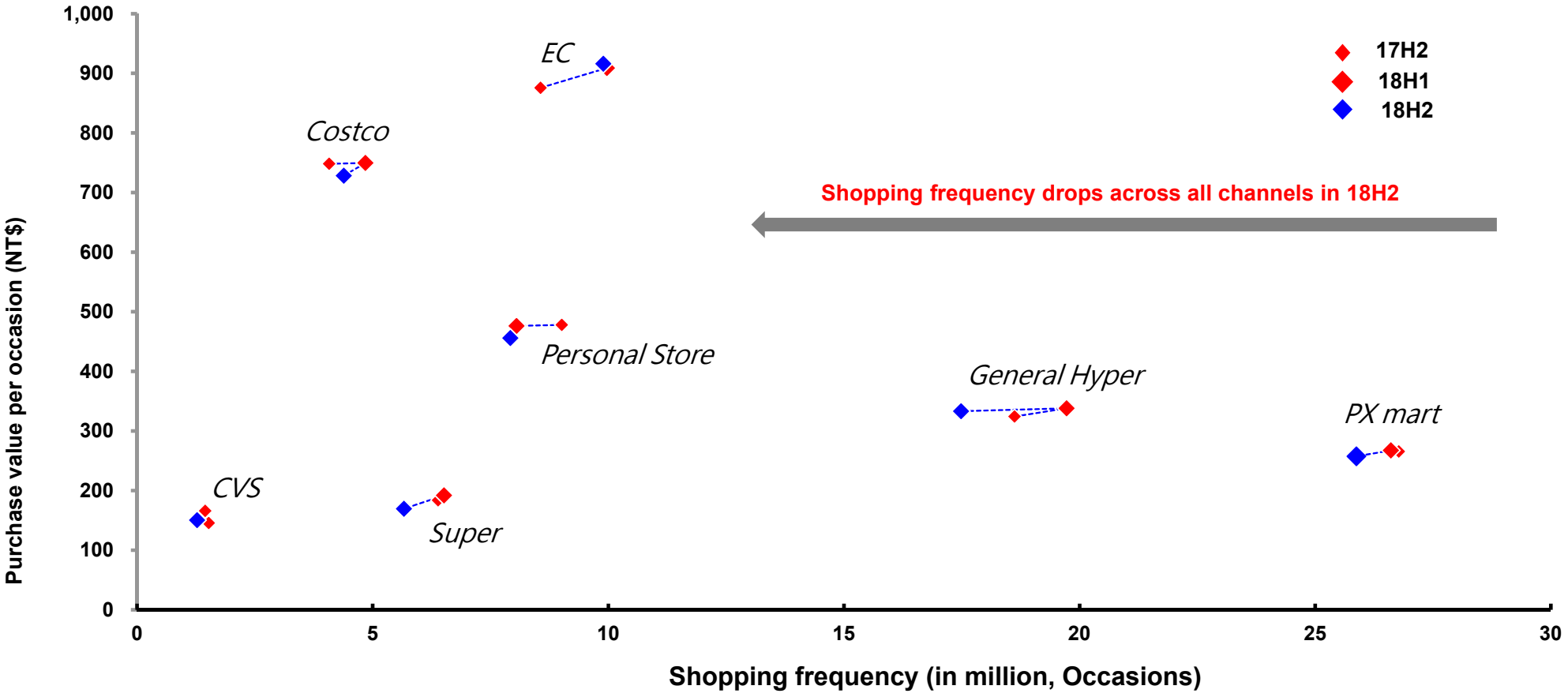
台灣 整體民生消費品市場 52 周推移趨勢

整體消費品市場仍以食品類展現較佳的成長動能，用品類未見回升。



資料來源：凱度消費者指數　家戶指數

Retailer Trend– Non Food

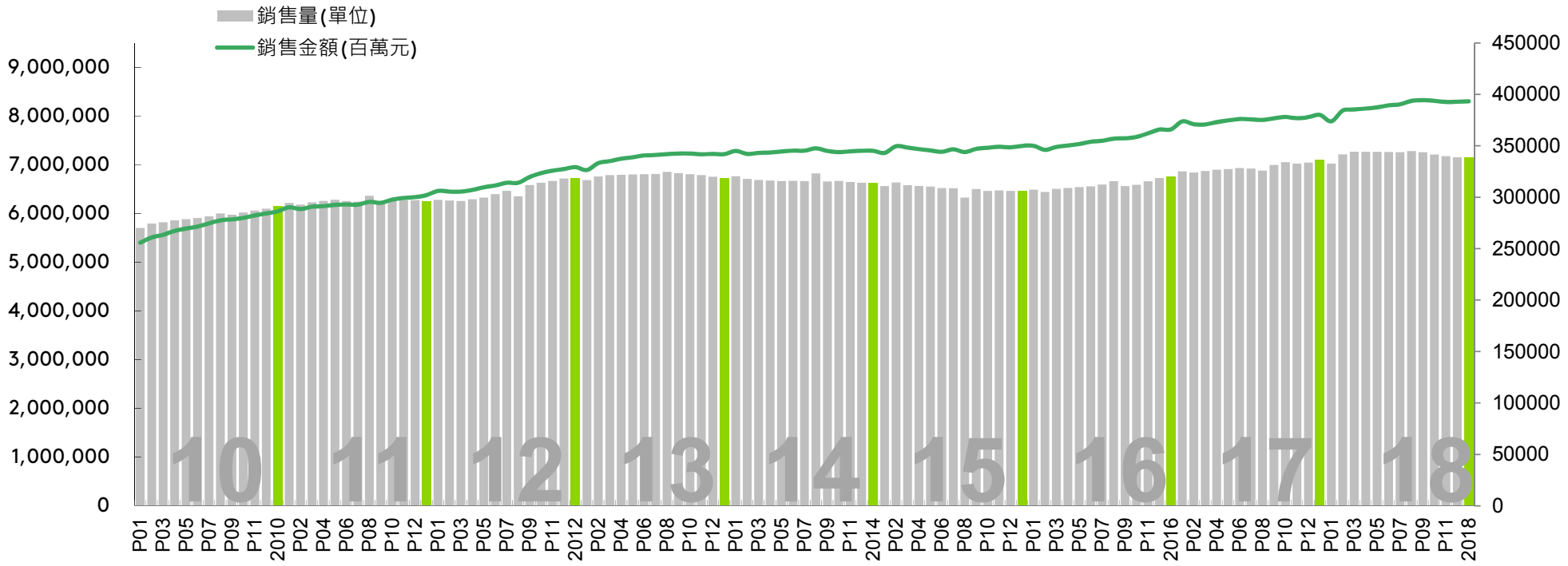


Data source：Kantar Worldpanel Household panel

台灣 整體民生消費市場 52 周推移趨勢

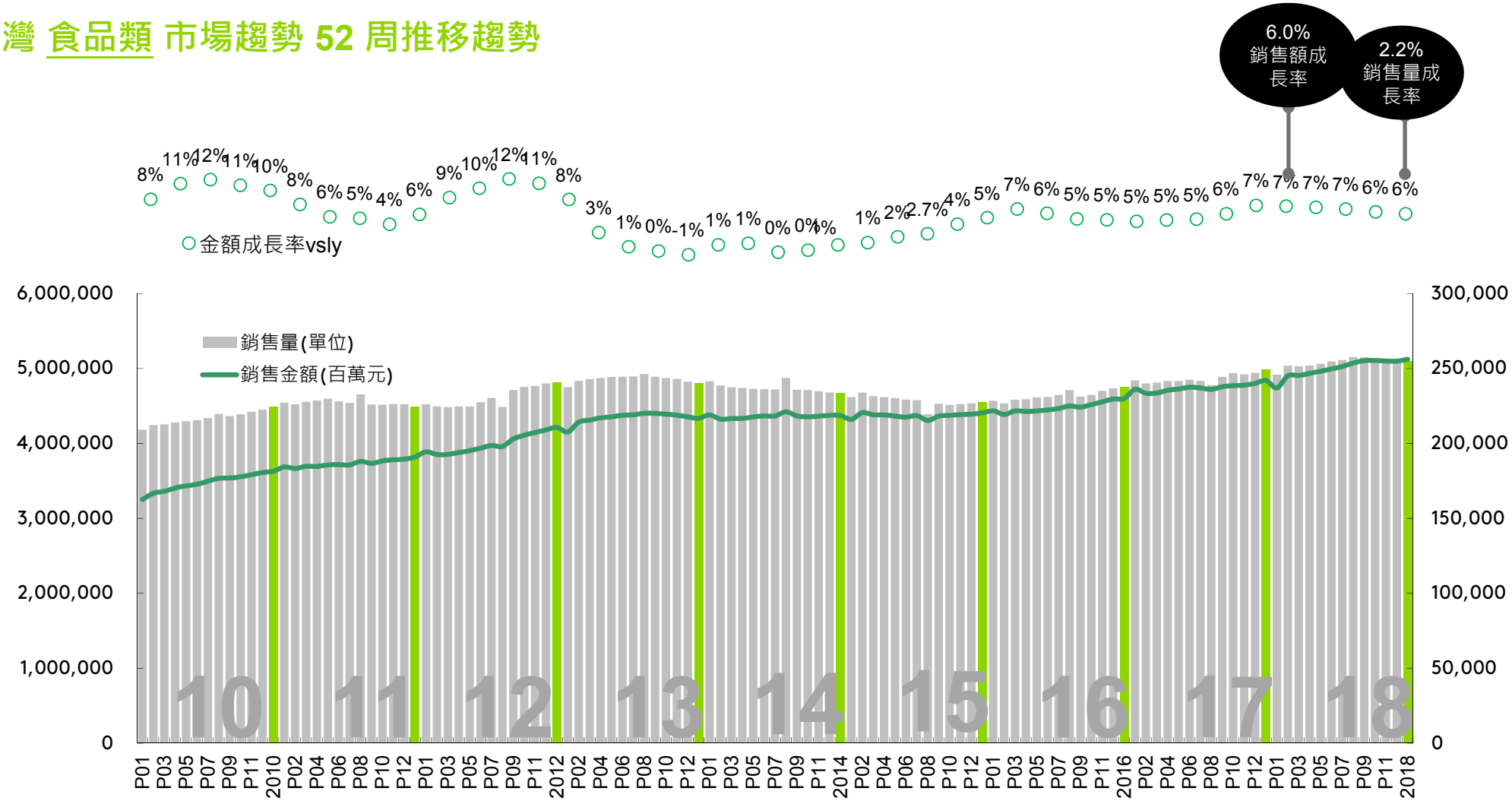
3.7%
銷售額成長率

0.8%
銷售量成長率



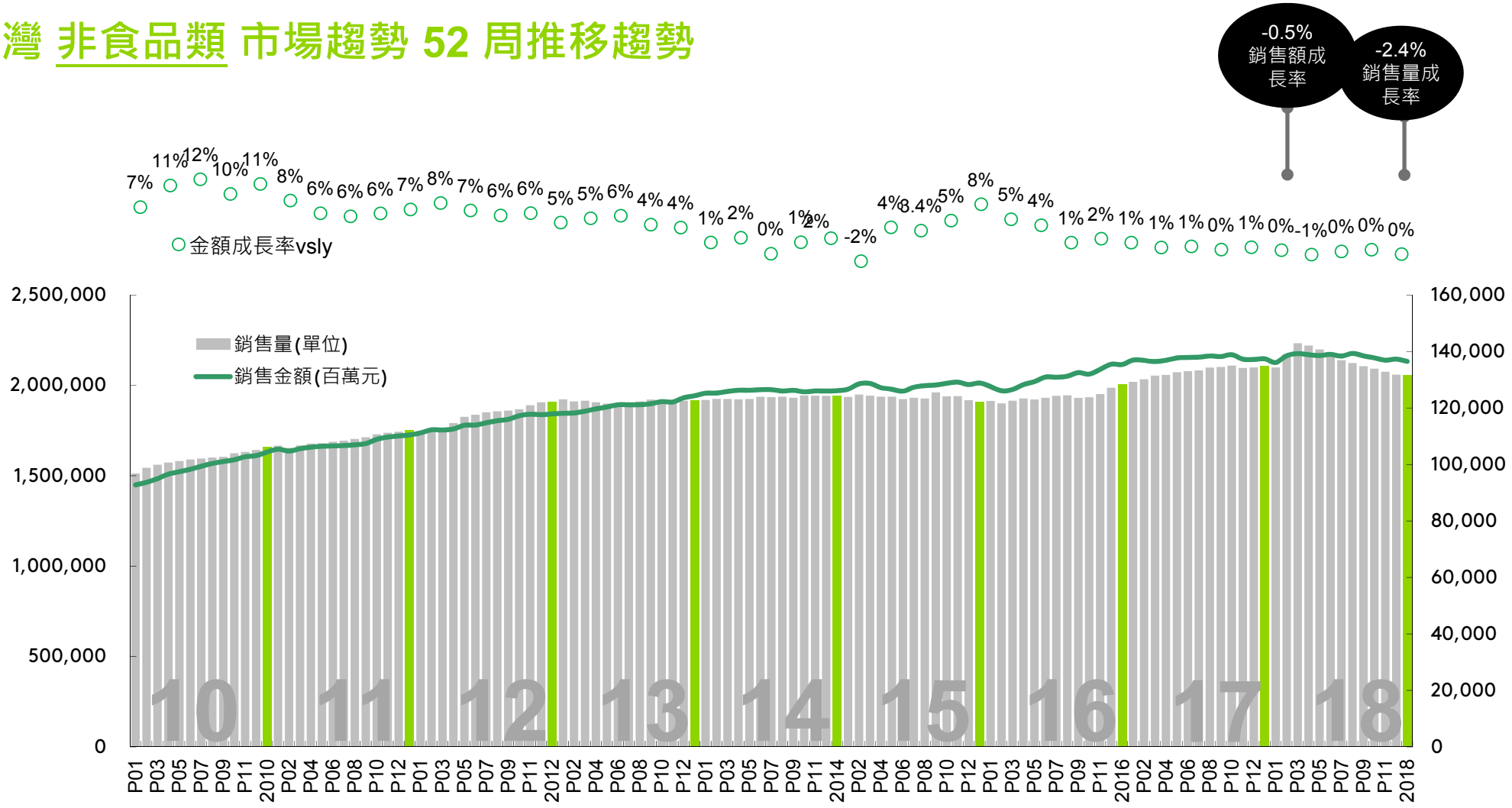
資料來源：凱度消費者指數　家戶指數

台灣 食品類 市場趨勢 52 周推移趨勢



資料來源：凱度消費者指數　家戶指數

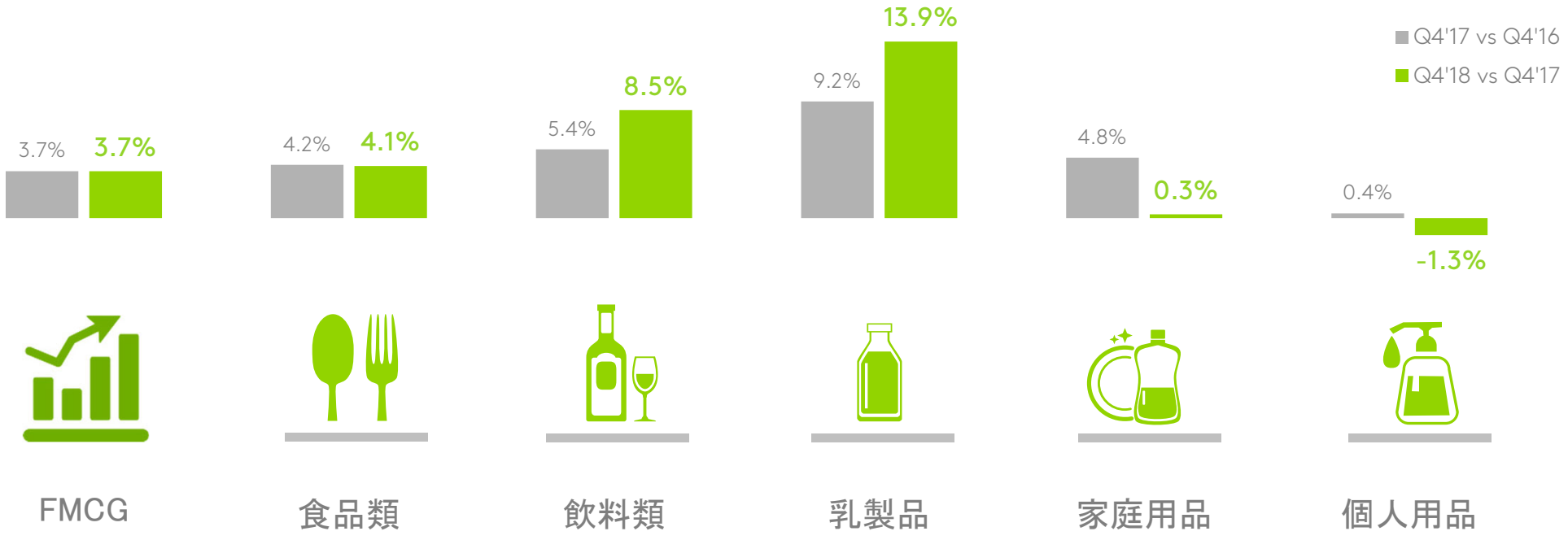
台灣 非食品類 市場趨勢 52 周推移趨勢



資料來源：凱度消費者指數　家戶指數

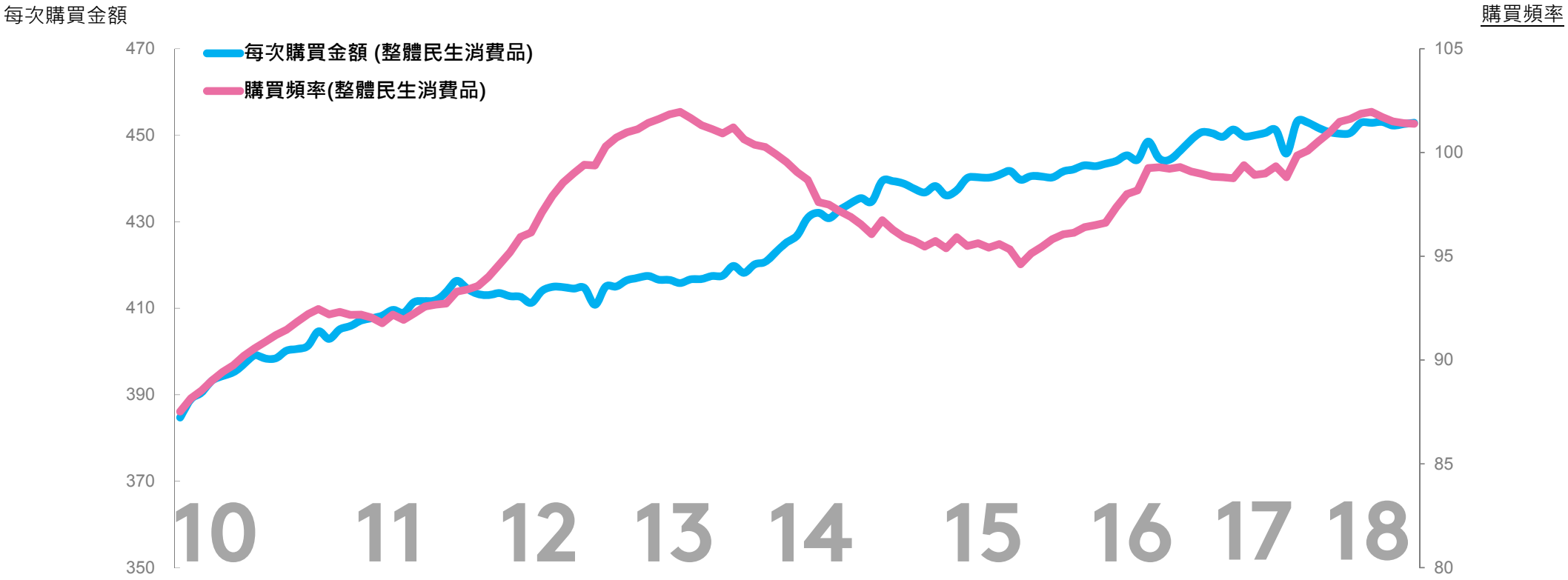
品類成長趨勢(年對年銷售額成長率)

整體家庭消費市場中，飲料類與乳製品類表現優於市場，家庭用品與個人用品在第四季表現停滯。 2018年奶茶在廠商的操作下，推出重乳比例的產品，或與手搖杯聯名掀起話題性，有相當好的表現。研磨咖啡進入第四季依然展現強勁的成長動能。乳製品在鮮乳的帶動下，成長更勝2017年，加上天氣越來越炎熱，延長消費者停留在市場上的時間。家庭用品中洗衣精高價商品深度促銷、牙膏牙刷囤貨，影響品類成長動能。整體個人用品類成長趨緩，但染髮與香水保有不錯的表現。



MAT – VALUE SPEND GROWTH

資料來源：凱度消費者指數　家戶指數

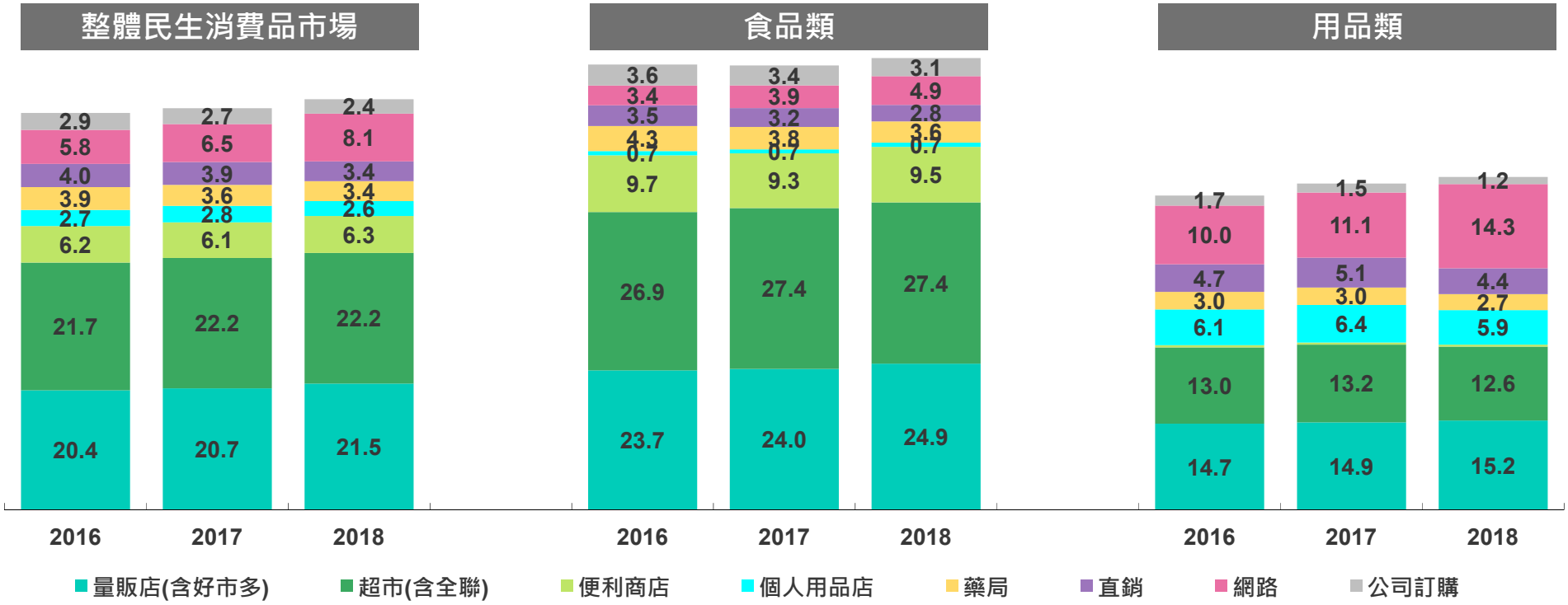


KANTAR WORLDPANEL

資料來源：凱度消費者指數　家戶指數

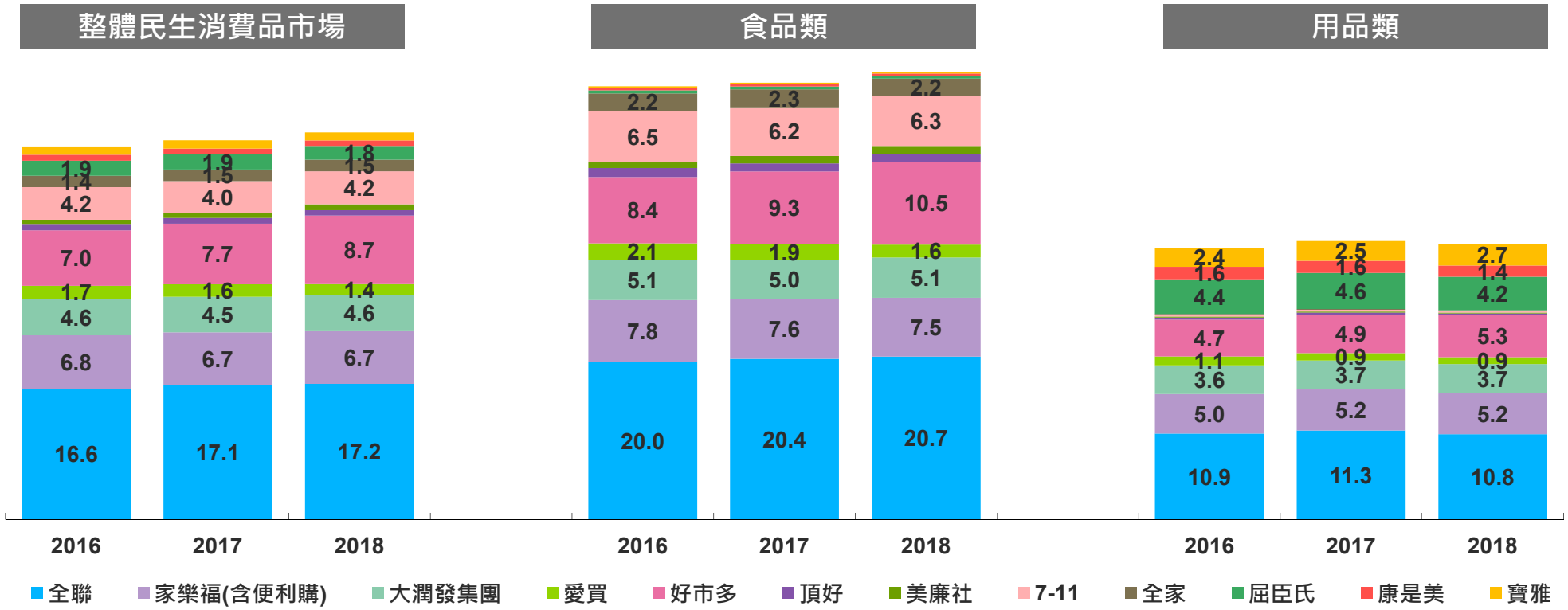
主要通路重要性 – 銷售金額 %

好市多在食品類維持成長態勢，帶動量販在整體市場重要性提升，超市在食品類表現持平，然用品類則出現衰退。電商在用品類維持強勁的動能，成為用品類第二大通路，相信在2019年應能站穩領導地位。



資料來源：凱度消費者指數　家戶指數

主要零售商重要性 – 銷售金額 %



資料來源：凱度消費者指數　家戶指數

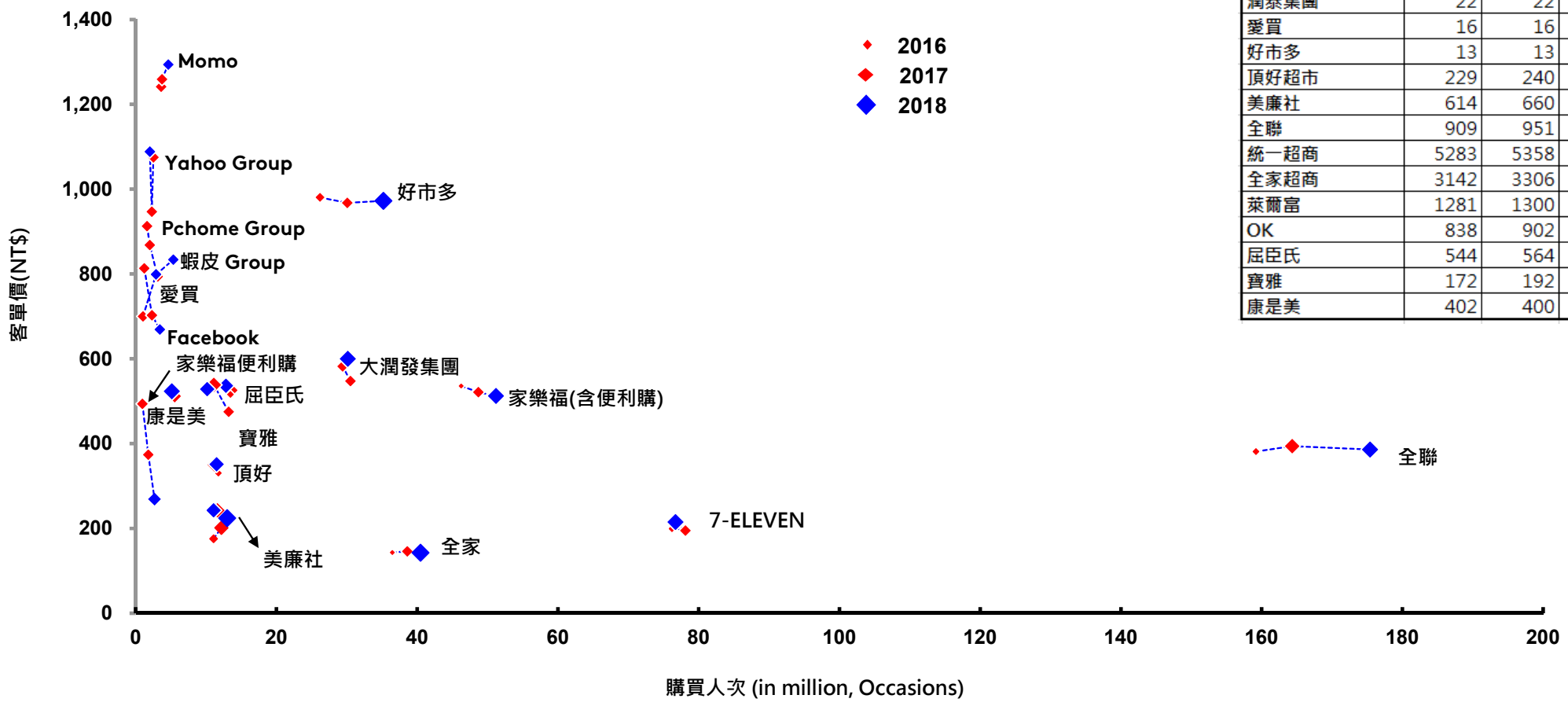
零售商店數

店數	Dec-17	Dec18	成長率%
家樂福(含便利購)	109	128	+17%
量販店	64	64	+0%
便利購	45	64	+42%
潤泰集團	22	22	+0%
愛買	16	16	+0%
好市多	13	13	+0%
頂好超市	229	240	+5%
美廉社	614	660	+7%
全聯	909	951	+5%
統一超商	5283	5358	+1%
全家超商	3142	3306	+5%
萊爾富	1281	1300	+1%
OK	838	902	+8%
屈臣氏	544	564	+4%
寶雅	172	192	+12%
康是美	402	400	0%

資料來源：凱度消費者指數　家戶指數

Internal Only

零售商趨勢 – 整體民生消費市場購買次數 vs. 客單價

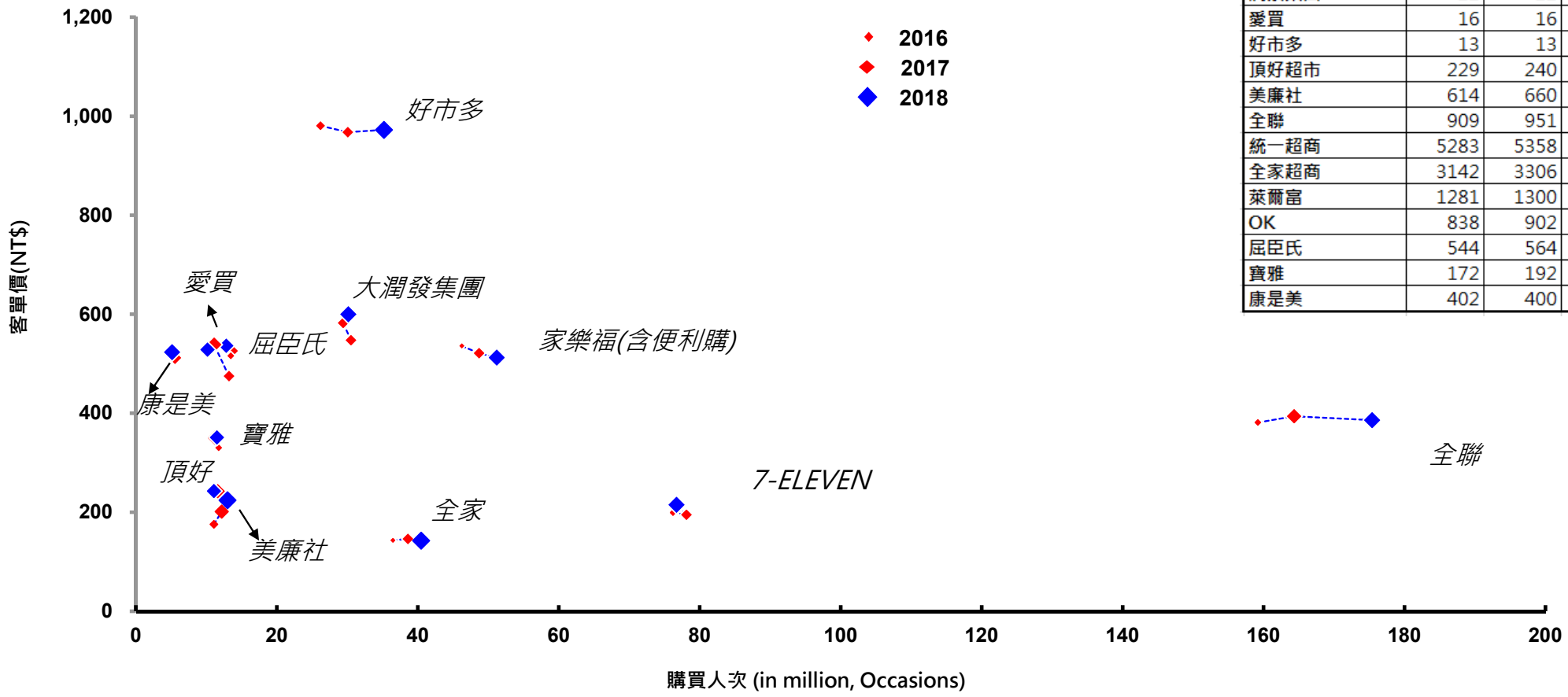


店數	Dec-17	Dec18	成長率%
家樂福(含便利購)	109	128	+17%
量販店	64	64	+0%
便利購	45	64	+42%
潤泰集團	22	22	+0%
愛買	16	16	+0%
好市多	13	13	+0%
頂好超市	229	240	+5%
美廉社	614	660	+7%
全聯	909	951	+5%
統一超商	5283	5358	+1%
全家超商	3142	3306	+5%
萊爾富	1281	1300	+1%
OK	838	902	+8%
屈臣氏	544	564	+4%
寶雅	172	192	+12%
康是美	402	400	0%

資料來源：凱度消費者指數　家戶指數

Internal Only

零售商趨勢 – 整體民生消費市場購買次數 vs. 客單價

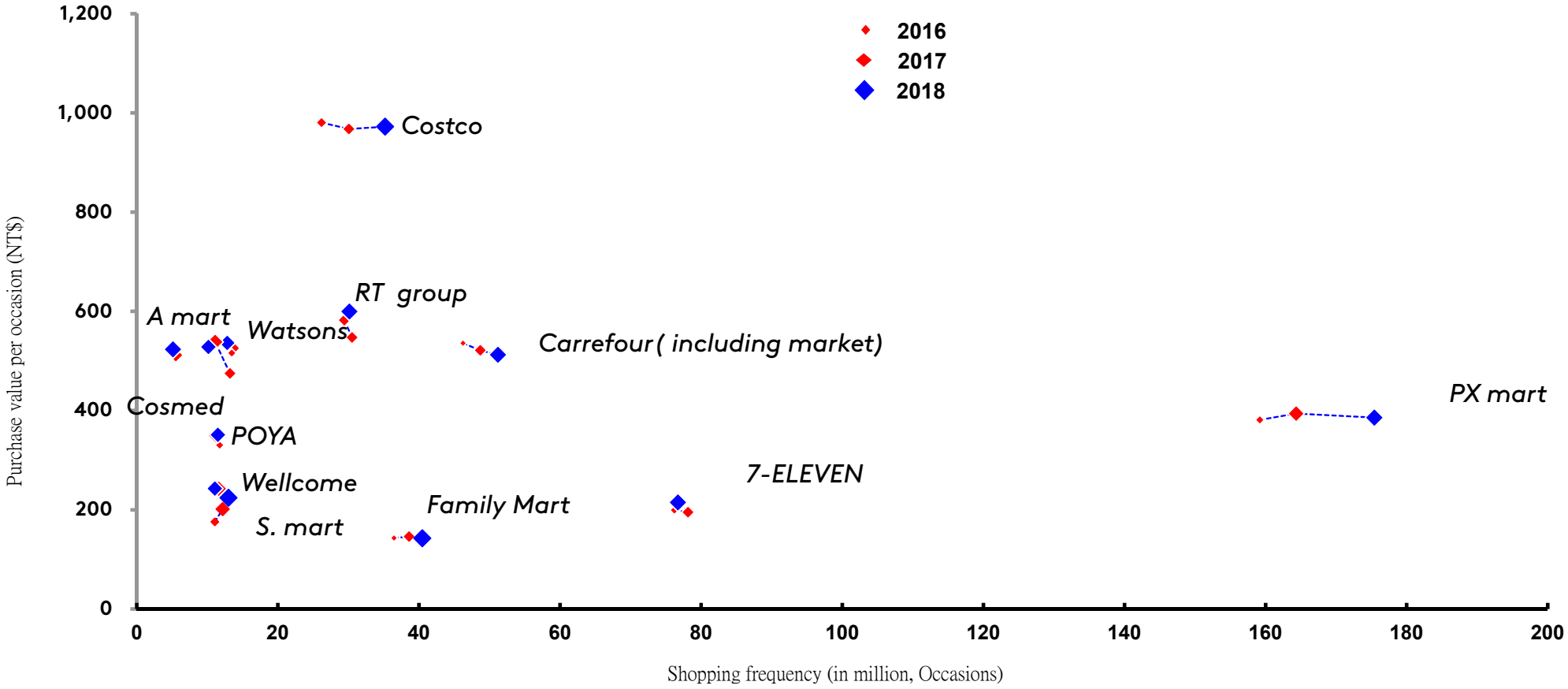


店數	Dec-17	Dec18	成長率%
家樂福(含便利購)	109	128	+17%
量販店	64	64	+0%
便利購	45	64	+42%
潤泰集團	22	22	+0%
愛買	16	16	+0%
好市多	13	13	+0%
頂好超市	229	240	+5%
美廉社	614	660	+7%
全聯	909	951	+5%
統一超商	5283	5358	+1%
全家超商	3142	3306	+5%
萊爾富	1281	1300	+1%
OK	838	902	+8%
屈臣氏	544	564	+4%
寶雅	172	192	+12%
康是美	402	400	0%

資料來源：凱度消費者指數　家戶指數

Internal Only

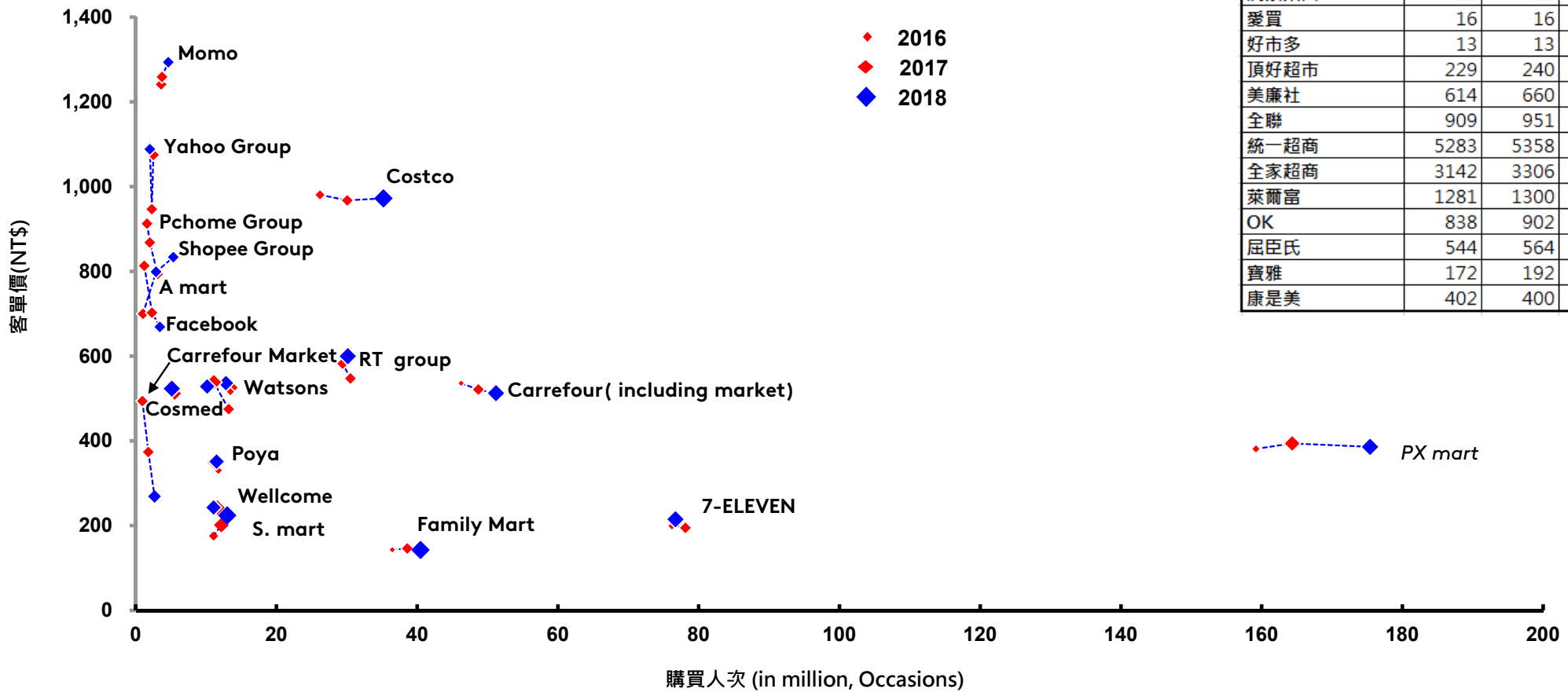
Retailer Trend– Total FMCG market



Data source：Kantar Worldpanel Household panel

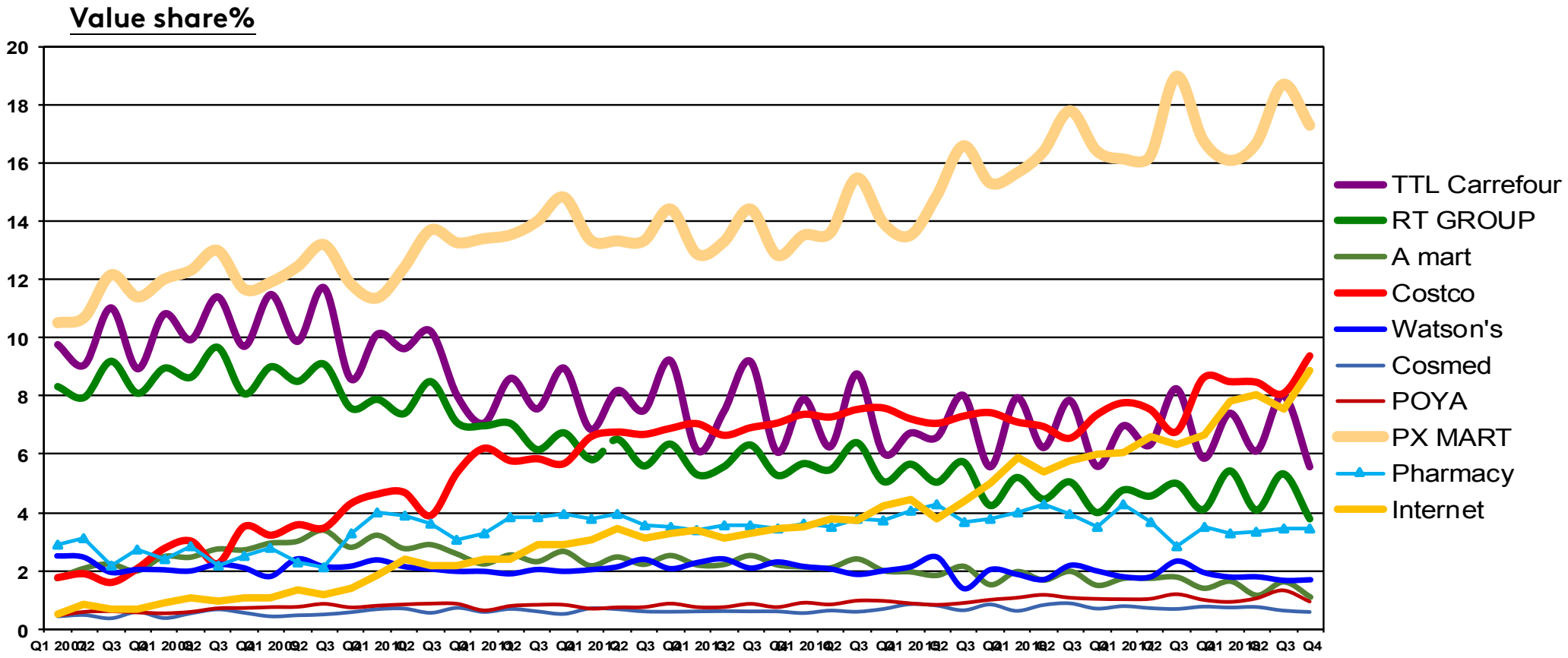
Internal Only

Retailer Trend– Total FMCG market



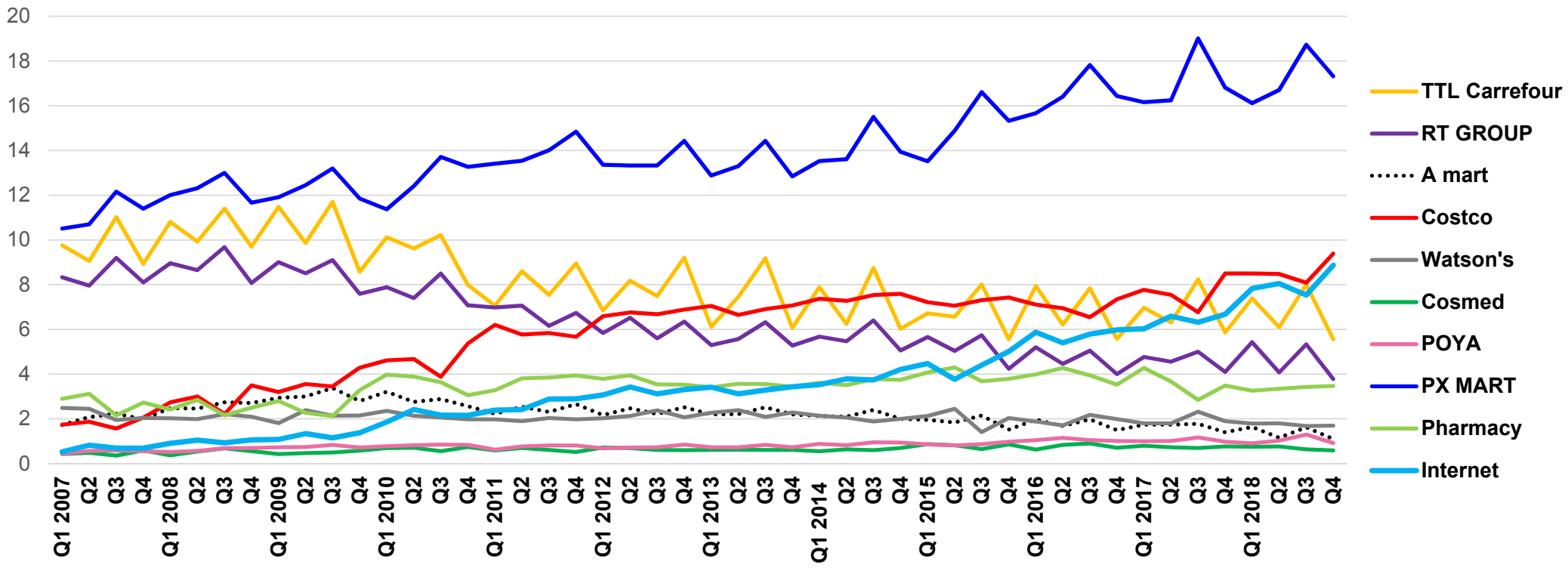
店數	Dec-17	Dec18	成長率%
家樂福(含便利購)	109	128	+17%
量販店	64	64	+0%
便利購	45	64	+42%
潤泰集團	22	22	+0%
愛買	16	16	+0%
好市多	13	13	+0%
頂好超市	229	240	+5%
美廉社	614	660	+7%
全聯	909	951	+5%
統一超商	5283	5358	+1%
全家超商	3142	3306	+5%
萊爾富	1281	1300	+1%
OK	838	902	+8%
屈臣氏	544	564	+4%
寶雅	172	192	+12%
康是美	402	400	0%

資料來源：凱度消費者指數　家戶指數



Q4 contains 16 wks; rest 12 wks

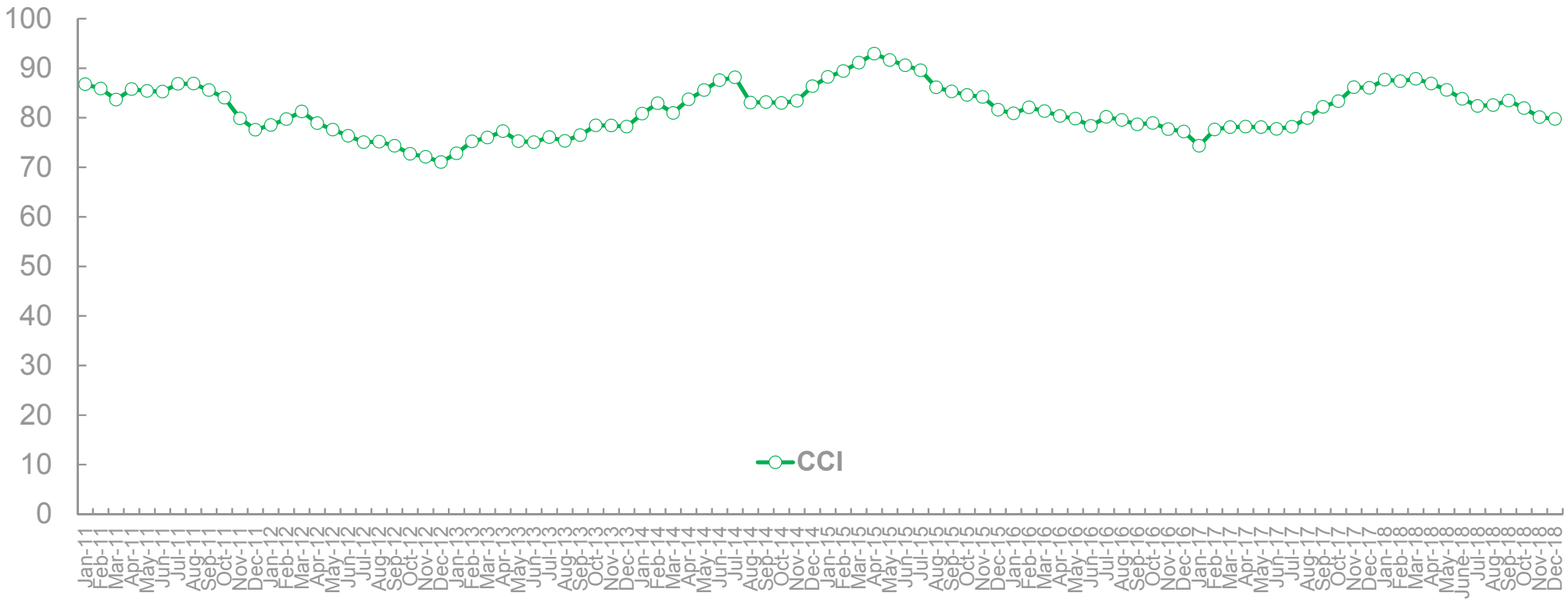
Value share%



Q4 contains 16 wks; rest 12 wks

Appendix_ Outlook of Taiwan

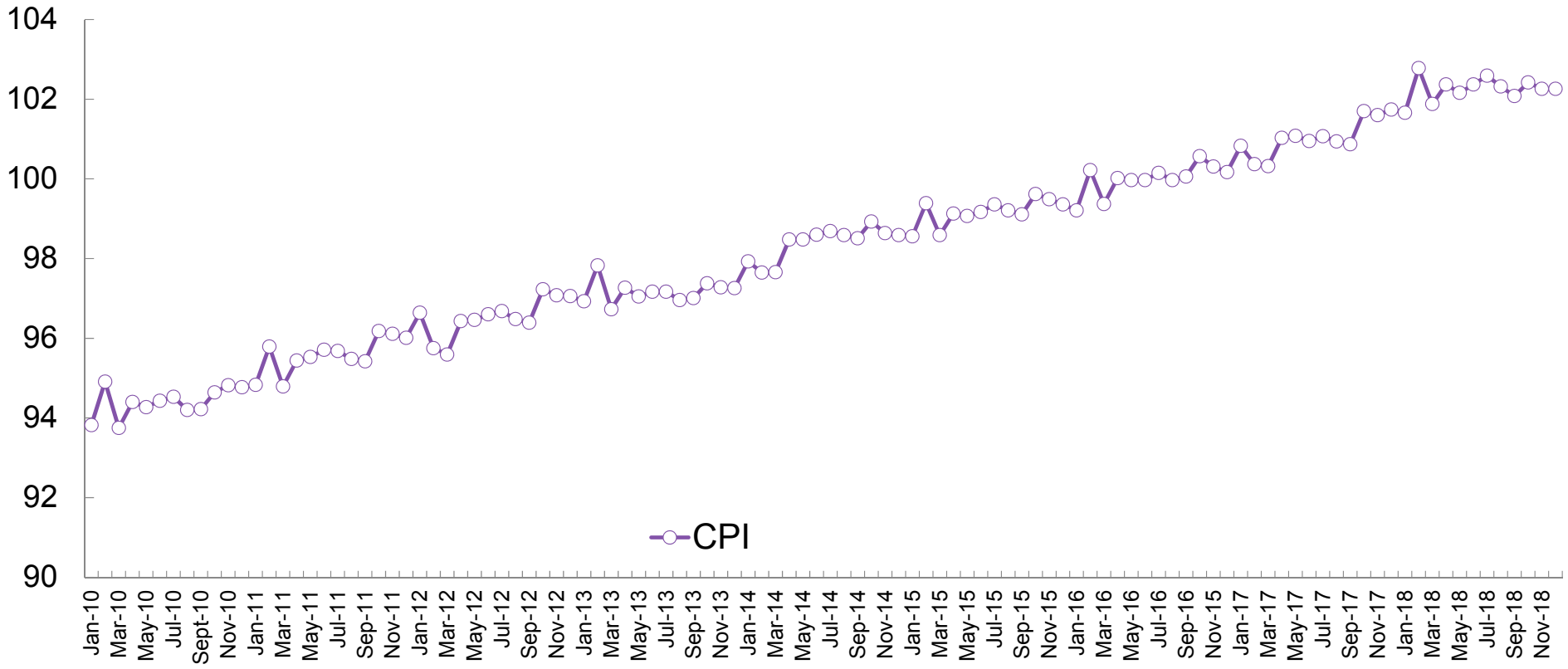
CCI



Data source: RCTED, NCU

Appendix_ Outlook of Taiwan

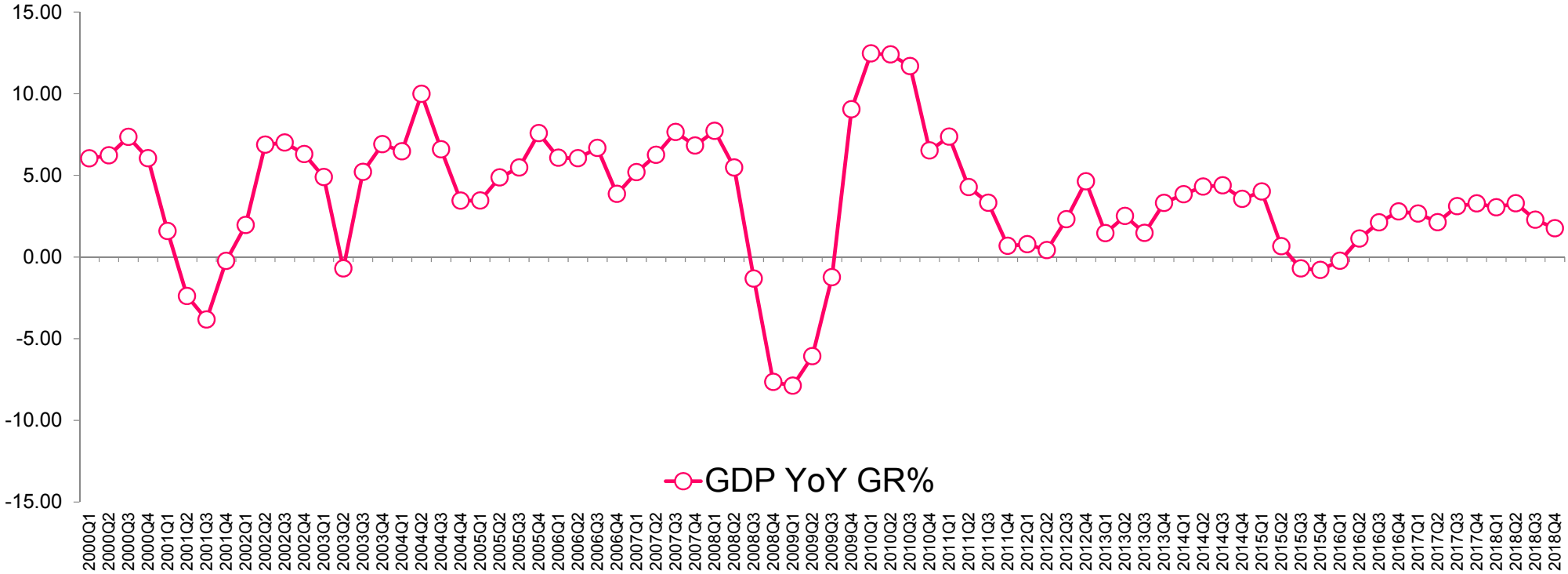
CPI_w/o Fresh Food/Energy
2016 as the base period



Data source: Executive Yuan, Accounting and Statistics

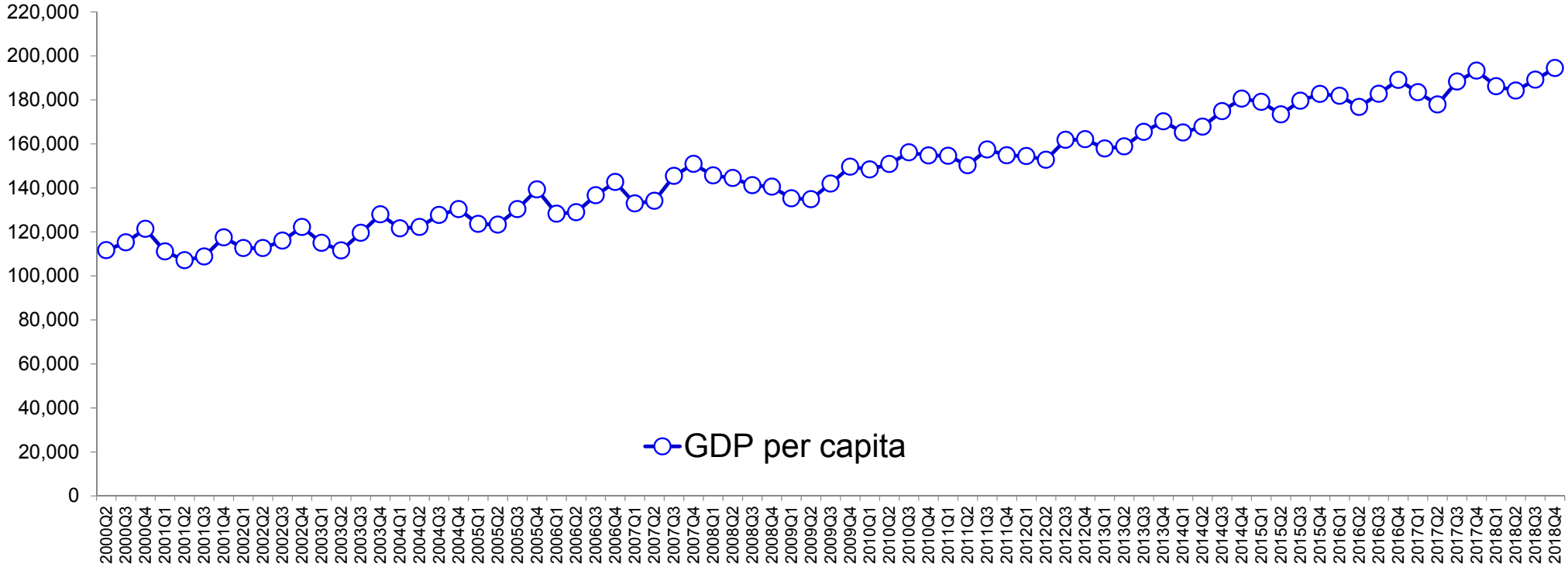
Appendix_ Outlook of Taiwan

GDP GR%



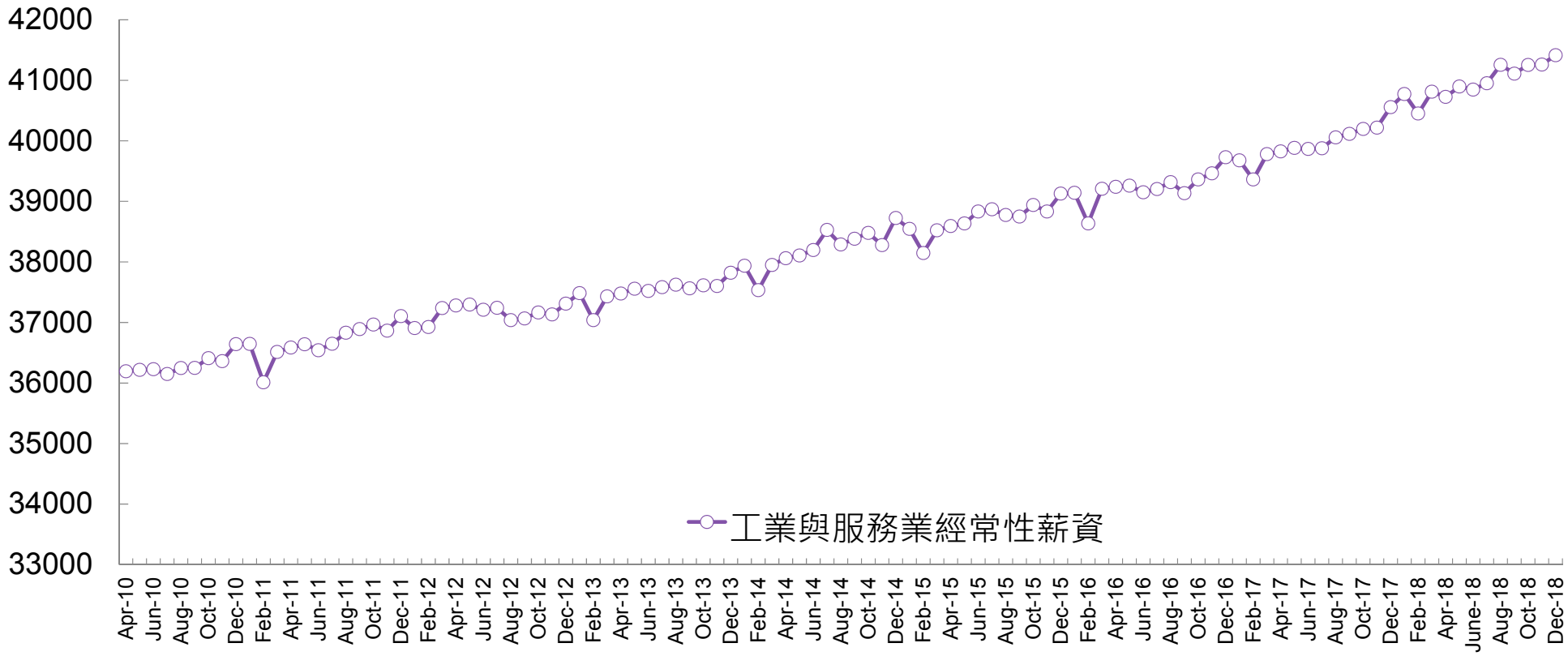
Appendix_ Outlook of Taiwan

GDP per capita



Appendix_ Outlook of Taiwan

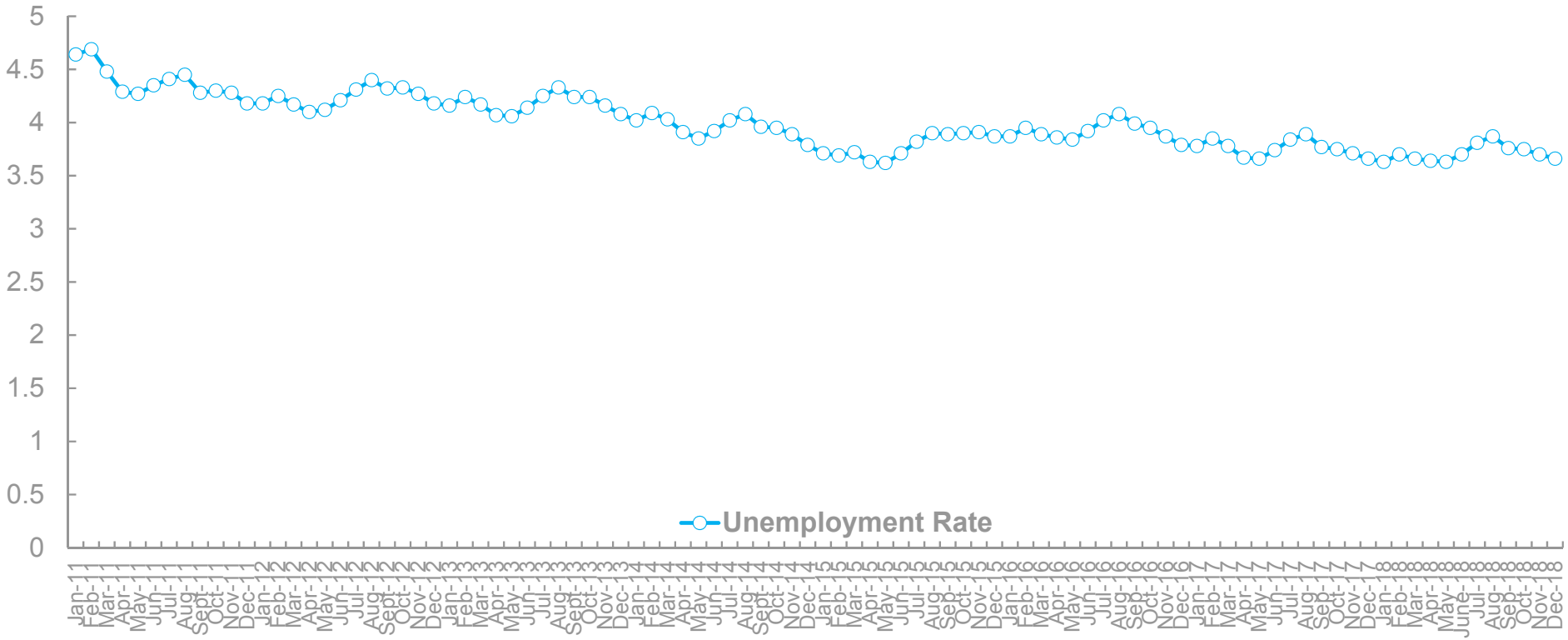
Industrial and service Recurrent salary



Data source: RCTED, NCU

Appendix_ Outlook of Taiwan

Unemployment Rate%

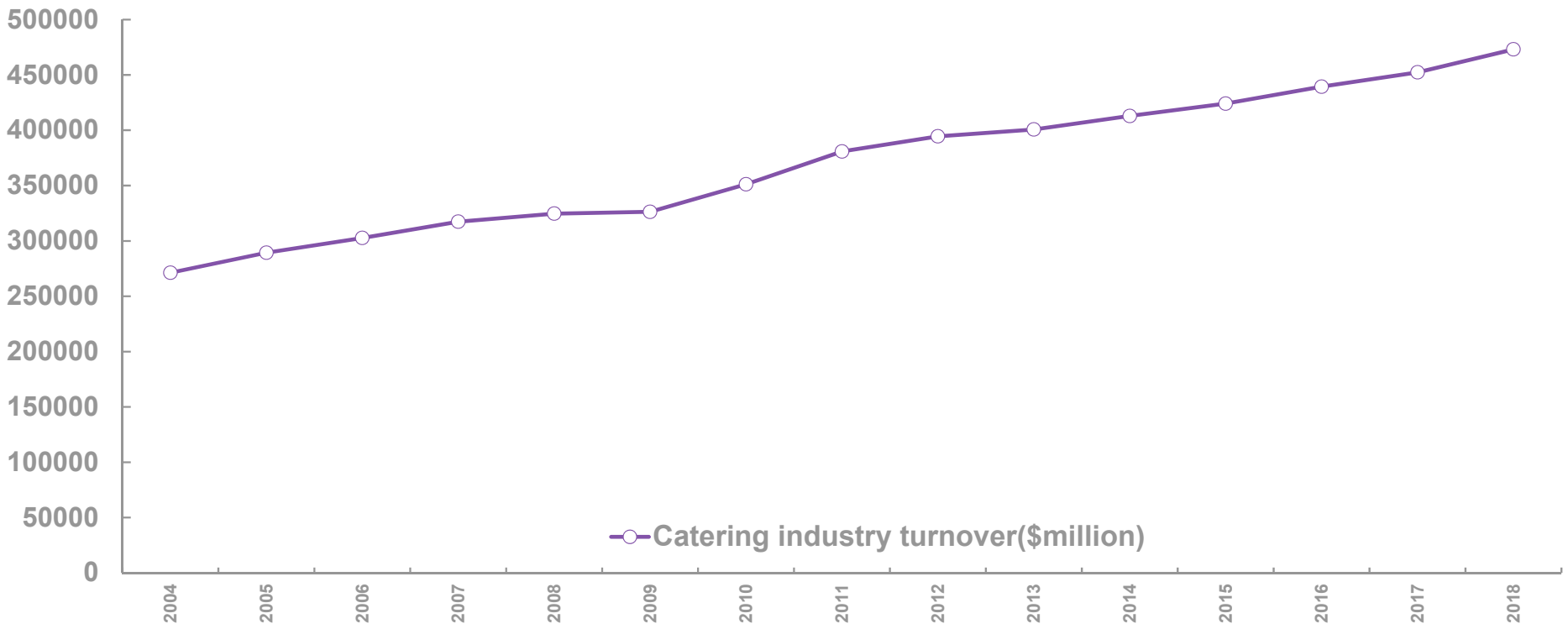


Data source: RCTED, NCU

Appendix_ Outlook of Taiwan

Catering industry

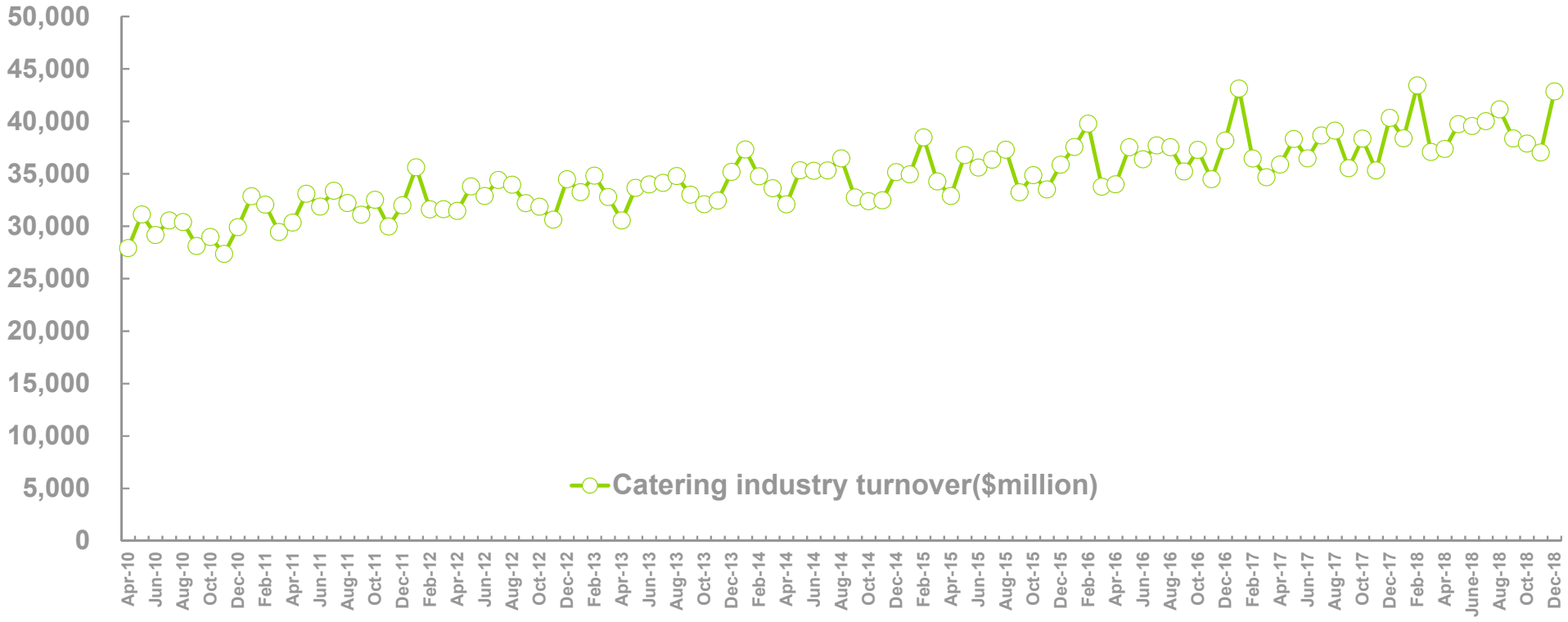
確認一下資料來源



Data source: RCTED, NCU

Appendix_ Outlook of Taiwan

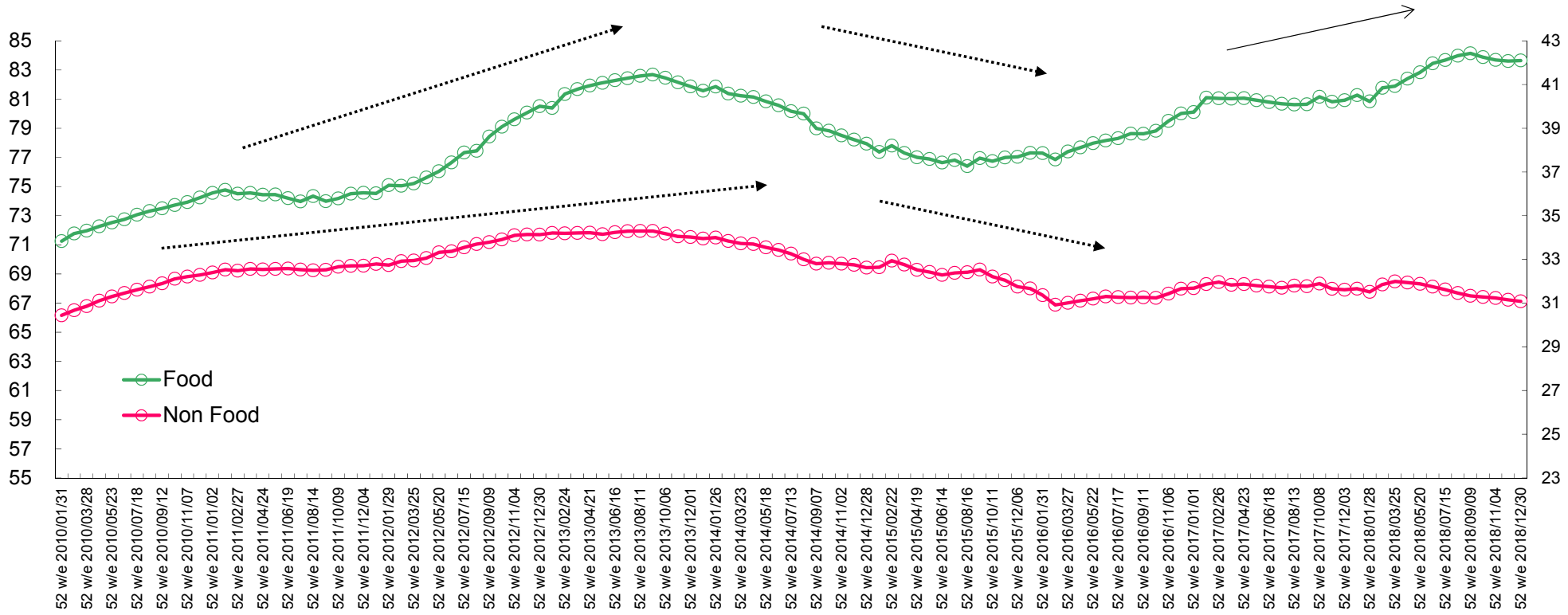
Catering industry by month
餐飲業營業額



Data source: RCTED, NCU

Appendix_ Taiwan FMCG Category Evolution

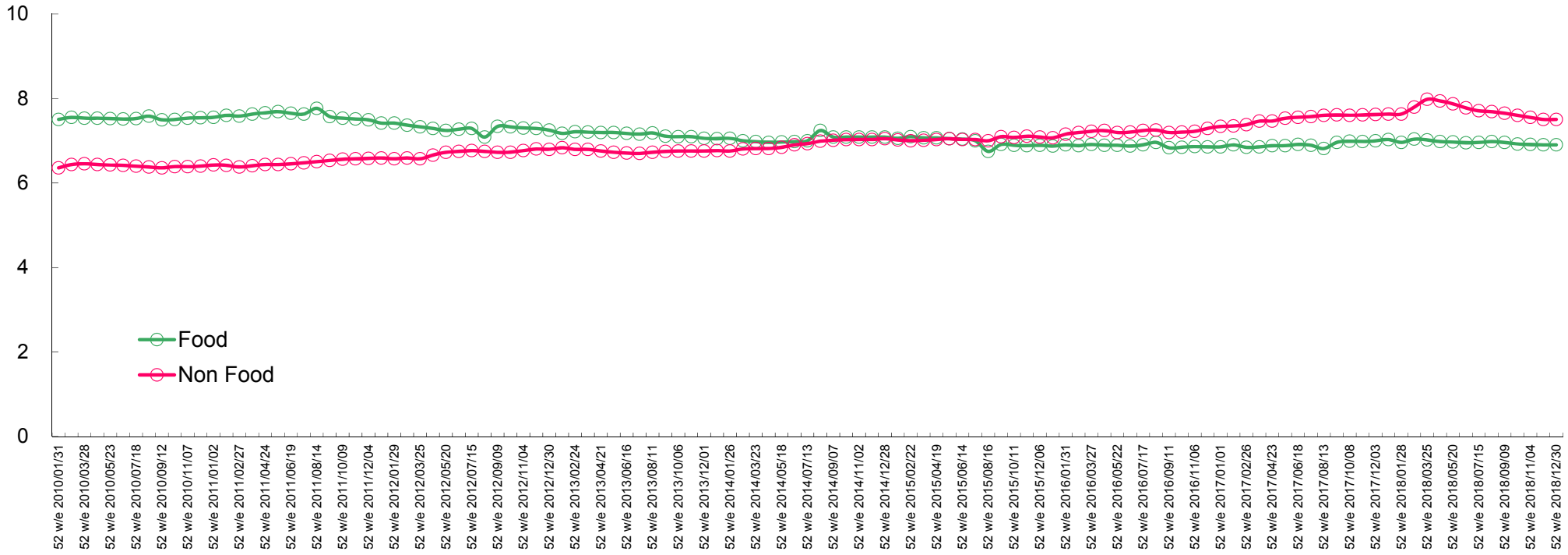
52 weeks Comparison, Shopping Frequency



資料來源:凱度消費者指數-家戶指數

Appendix_ Taiwan FMCG Category Evolution

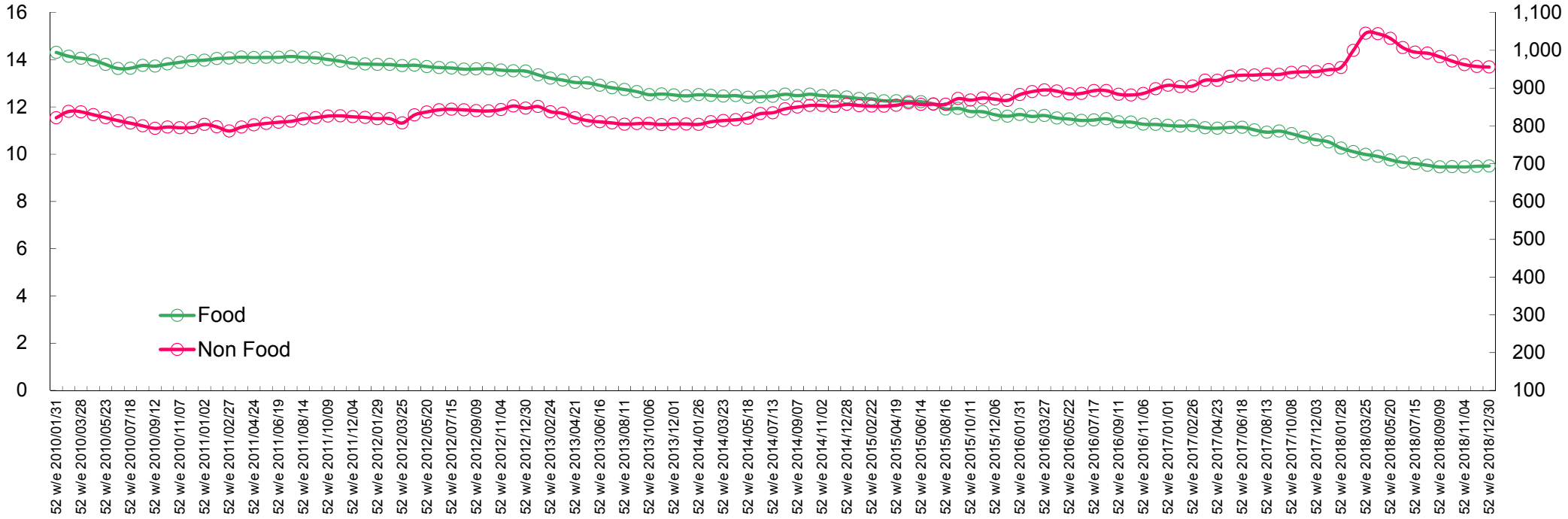
52 weeks Comparison, Trip Volume Unit



資料來源:凱度消費者指數-家戶指數

Appendix_ Taiwan FMCG Category Evolution

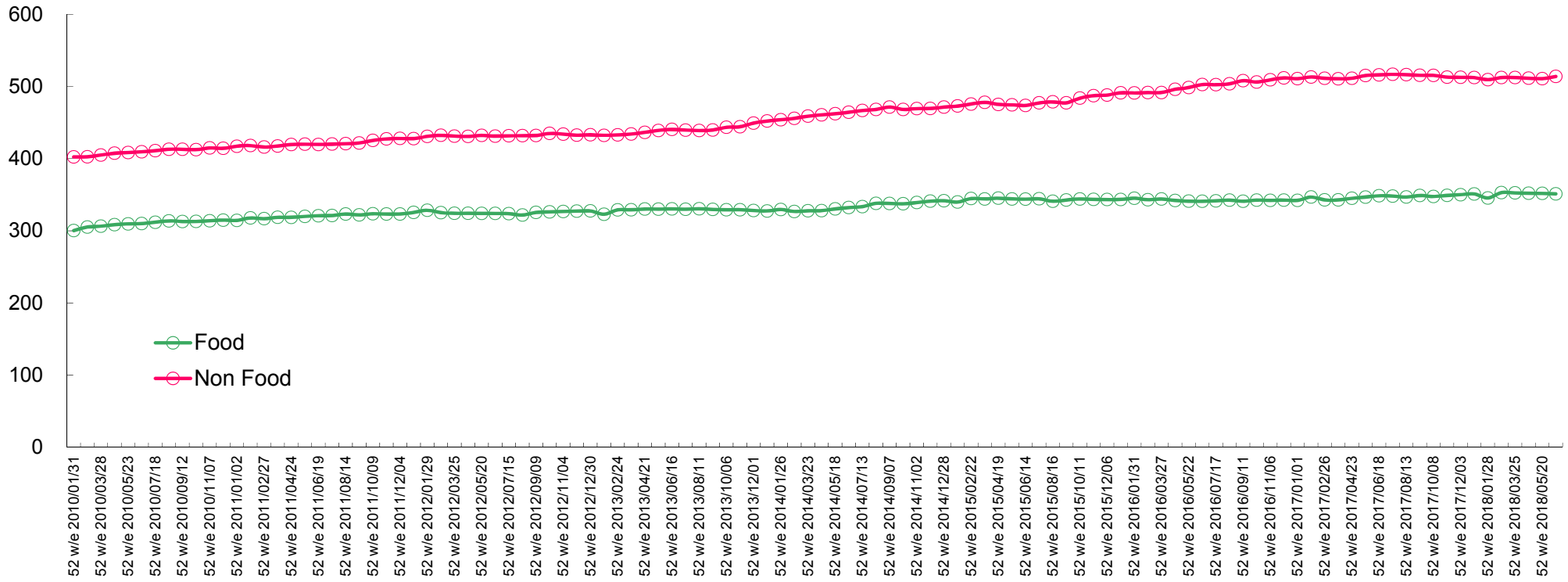
52 weeks Comparison, Trip Volume L/Liter/Piece



資料來源:凱度消費者指數-家戶指數

Appendix_ Taiwan FMCG Category Evolution

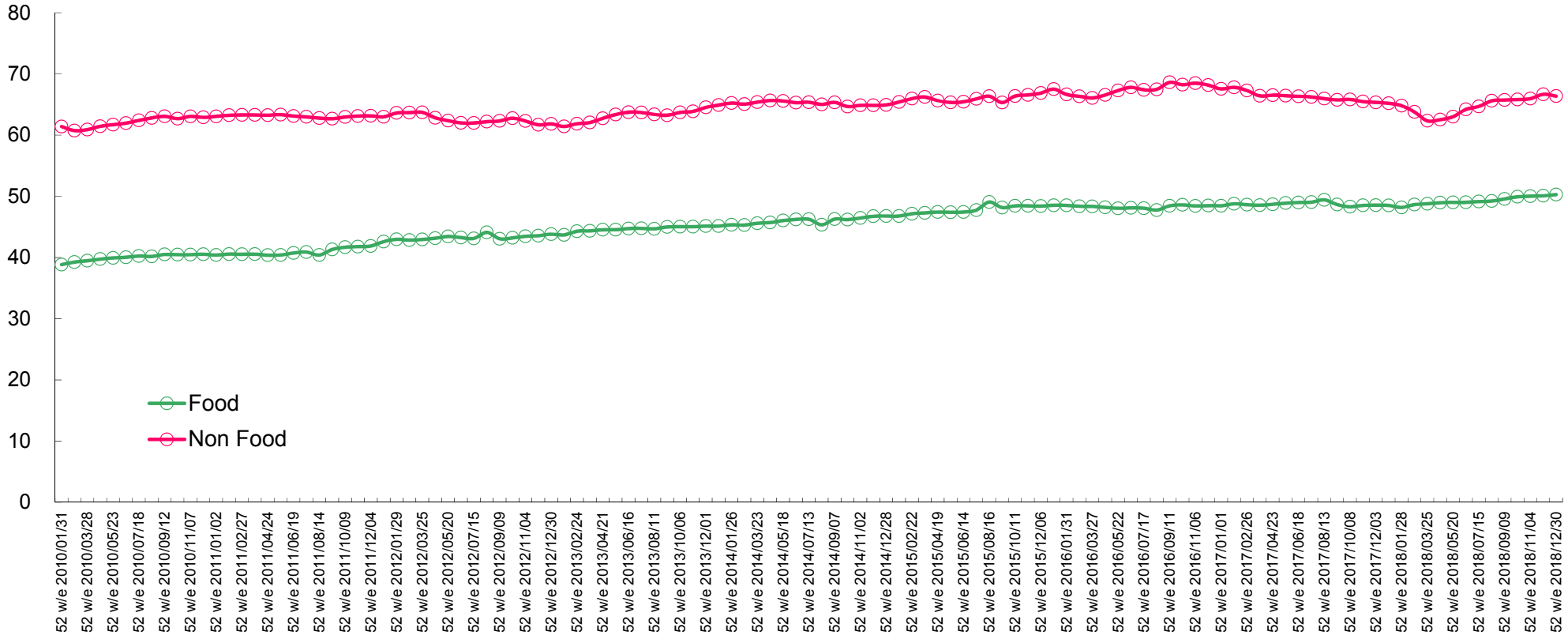
52 weeks Comparison, Spending per Trip



資料來源:凱度消費者指數-家戶指數

Appendix_ Taiwan FMCG Category Evolution

52 weeks Comparison, Ave. Price per unit



資料來源:凱度消費者指數-家戶指數