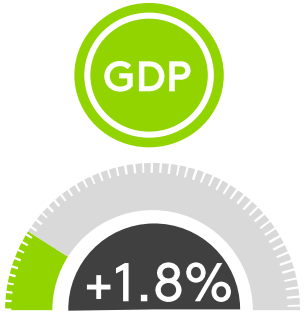
KANTAR WORLDPANEL

Taiwan FMCG Market Dynamic

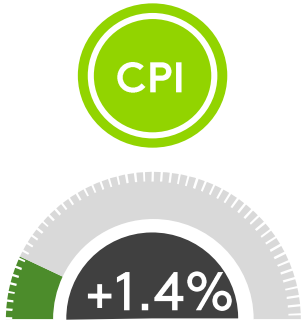
2018 Q4

Data source：Kantar Worldpanel Household panel

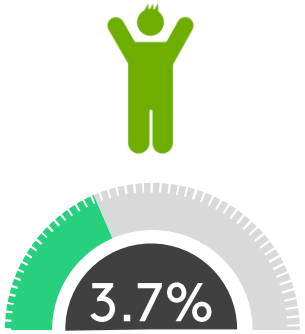
2018 Q4 Key Economic Indicators



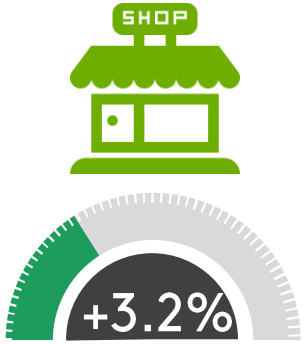
GDP
2018Q4



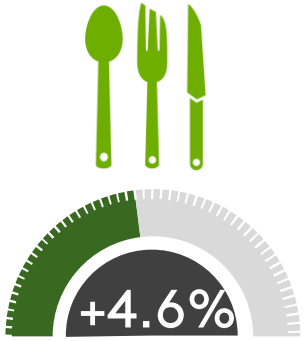
CPI
2018



Unemployment rate
2018



Retail trade service sales value growth
2018



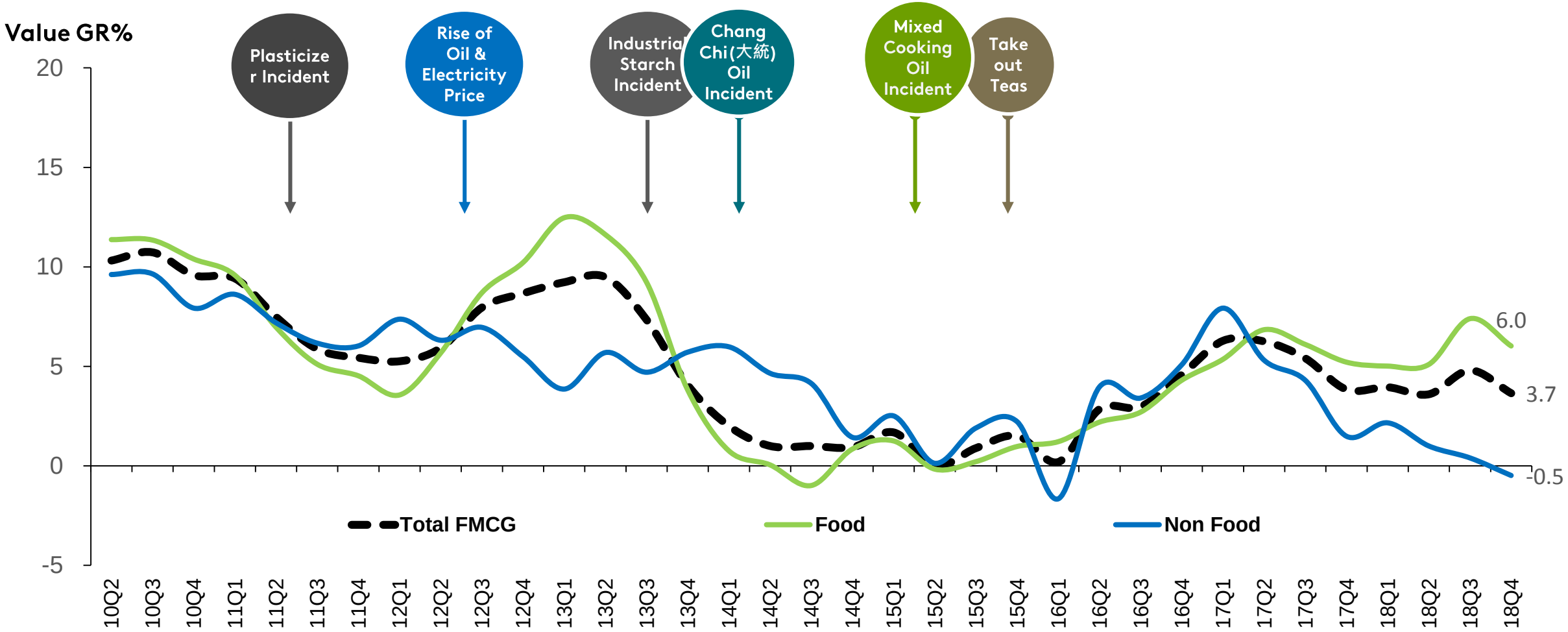
Food service sales value growth
2018

2018 FY：2.6%

Data source: Executive Yuan, Accounting and Statistics

Taiwan Total FMCG Market 52 w/e rolling trend

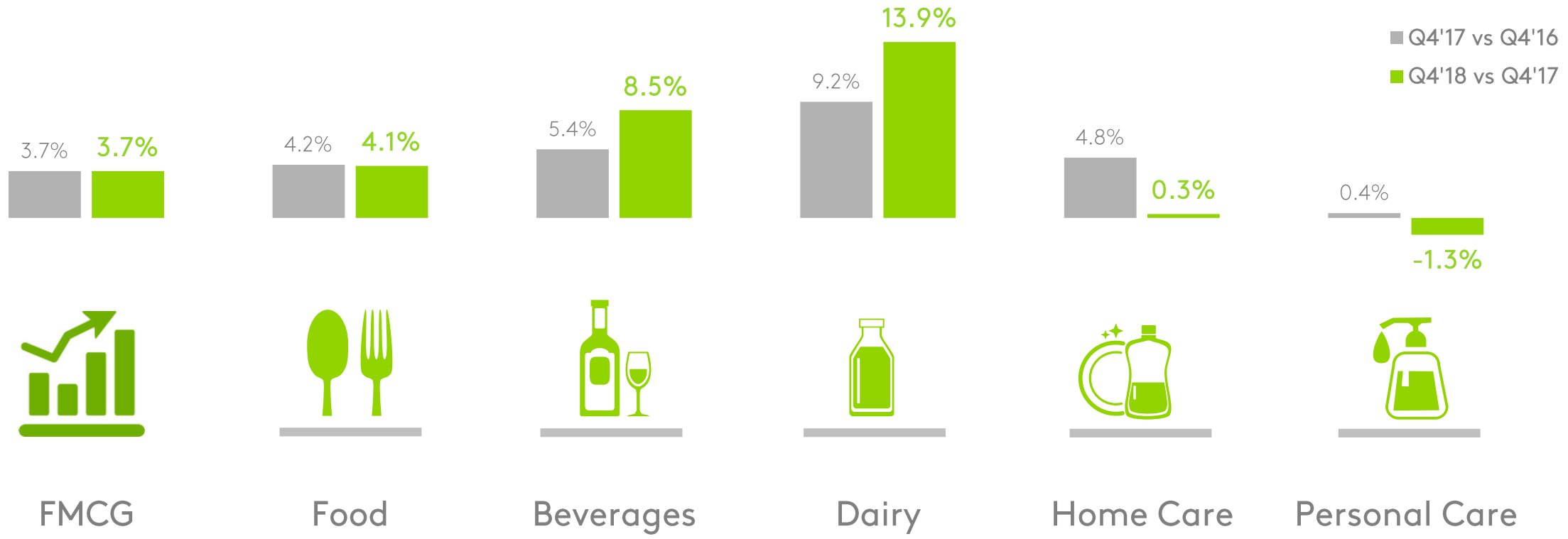
The growth of FMCG is contributed by food category, and the non food is stagnant.



Data source：Kantar Worldpanel Household panel

FMCG GROWTH IN Taiwan : YOY

- Beverages and dairy outperformed the overall market, while home care and personal care were stagnant in Q4.
- Milk Tea had good performance due to collaboration with take away tea brands and the launch of Rich Milk Tea (重乳奶茶) products. Ground Coffee continually showed strong growth in Q4.
- Dairy products had higher growth rate than 2017, mainly driven by Fresh Milk. Also warmer weather might extended peak season this year.
- Deep promotion of premium detergent and the stock up of oral care products slowed down the growth of overall personal care, whereas hair dyes and perfumes remained a good performance.

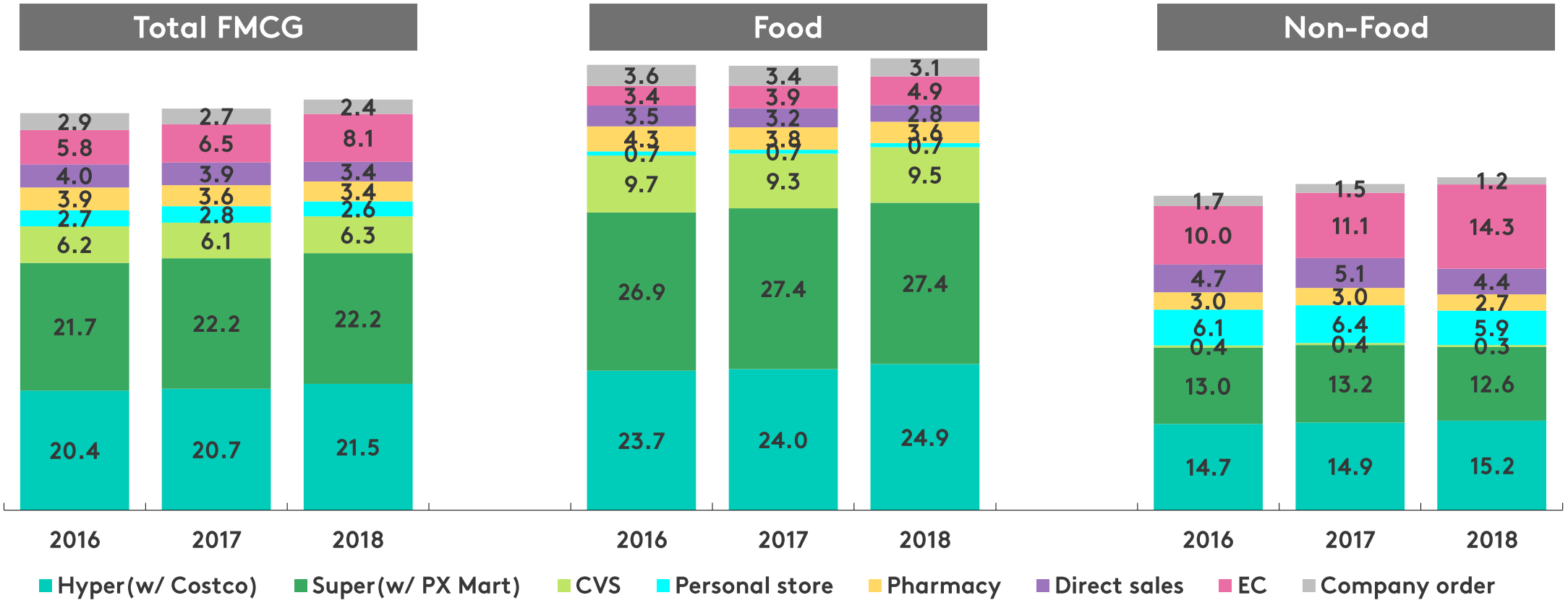


MAT – VALUE SPEND GROWTH

資料來源：凱度消費者指數　家戶指數

Channel Landscape– sales value %

- Within Food category, Costco maintained the growth momentum, which leads to an increase in the importance of Hyper.
- Super have remained stable in the Food category, while Non Food has declined.
- EC maintains strong performance in Non Food and becomes the second largest channel. It is believed that it should be able to establish a leading position in 2019.



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