KANTAR WORLDPANEL

Consumer Insights

ASIA Q4 2018

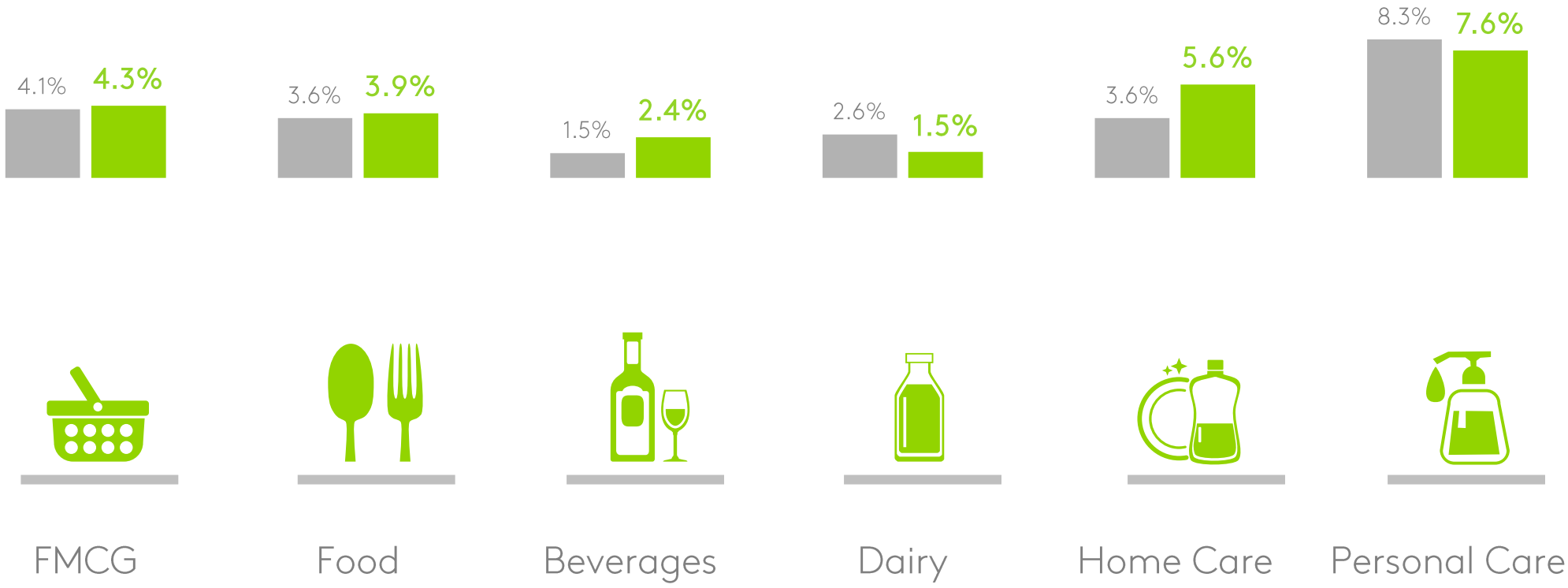
Q4 2018 | SUMMARY ASIA

	Northeast Asia			West Asia		Southeast Asia					
	China Mainland	Taiwan	South Korea	India (Urban)	Saudi Arabia	Indonesia	Malaysia	Thailand	Philippines	Vietnam (Urban)	Vietnam (Rural)
FMCG Total	5.2	3.7	2.7	3.5	-4.3	1.3	-1.1	0.9	11.3	2.3	6.4
Food	4.4	5.1	5.1	1.5	-7.7	2.2	0.3	0.7	9.8	0.7	3.9
Beverages	1.2	4.1	9.4	6.7	-1.7	3.1	-1.3	-0.4	6.3	3.9	8.1
Dairy	1.8	9.7	-4.4	11.5	-2.2	-3.5	-5.2	-3.6	12.8	-0.7	7.9
Home Care	7.4	0.1	-0.8	5.5	-5.2	2.0	0.9	7.5	10.5	5.8	2.8
Personal Care	10.3	-1.1	0.5	6.1	-8.3	1.3	-1.4	2.0	18.8	6.3	9.0

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

% Value Change FMCG – MAT Q4 2018 vs. Year Ago

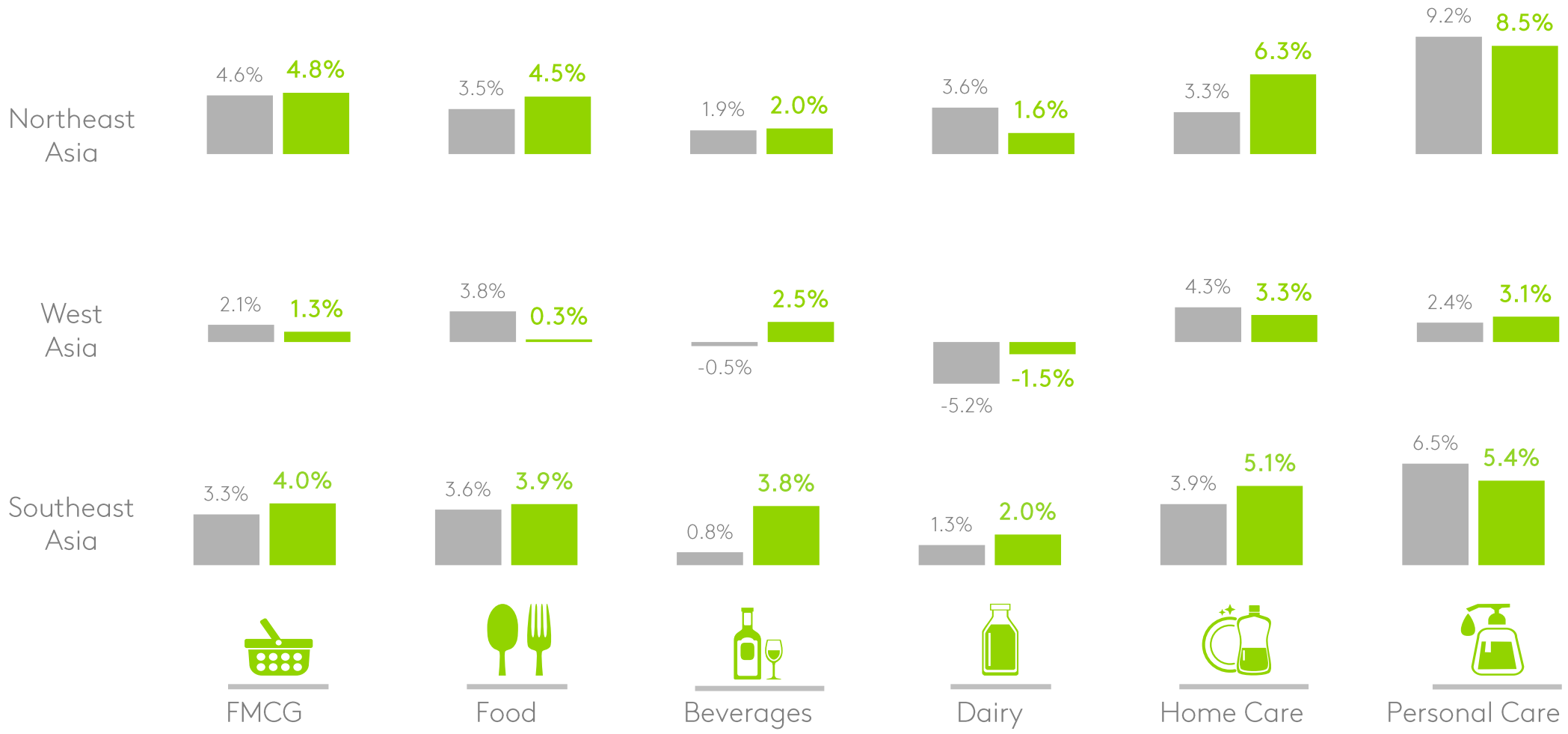
FMCG GROWTH IN ASIA : YOY



ASIA / MAT – VALUE SPEND GROWTH

Q4'17 vs Q4'16 Q4'18 vs Q4'17

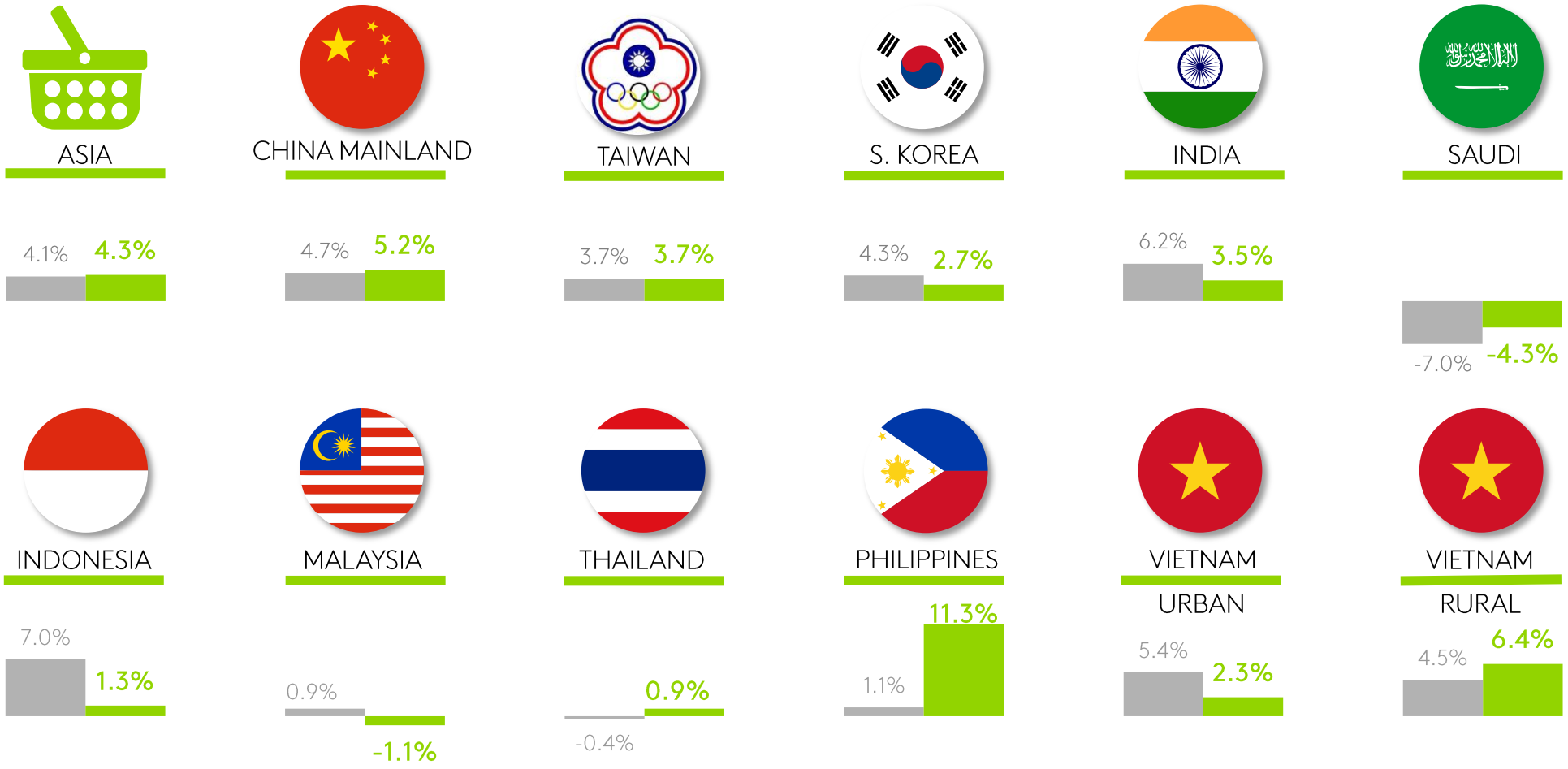
FMCG GROWTH IN ASIA : YOY



ASIA / MAT – VALUE SPEND GROWTH

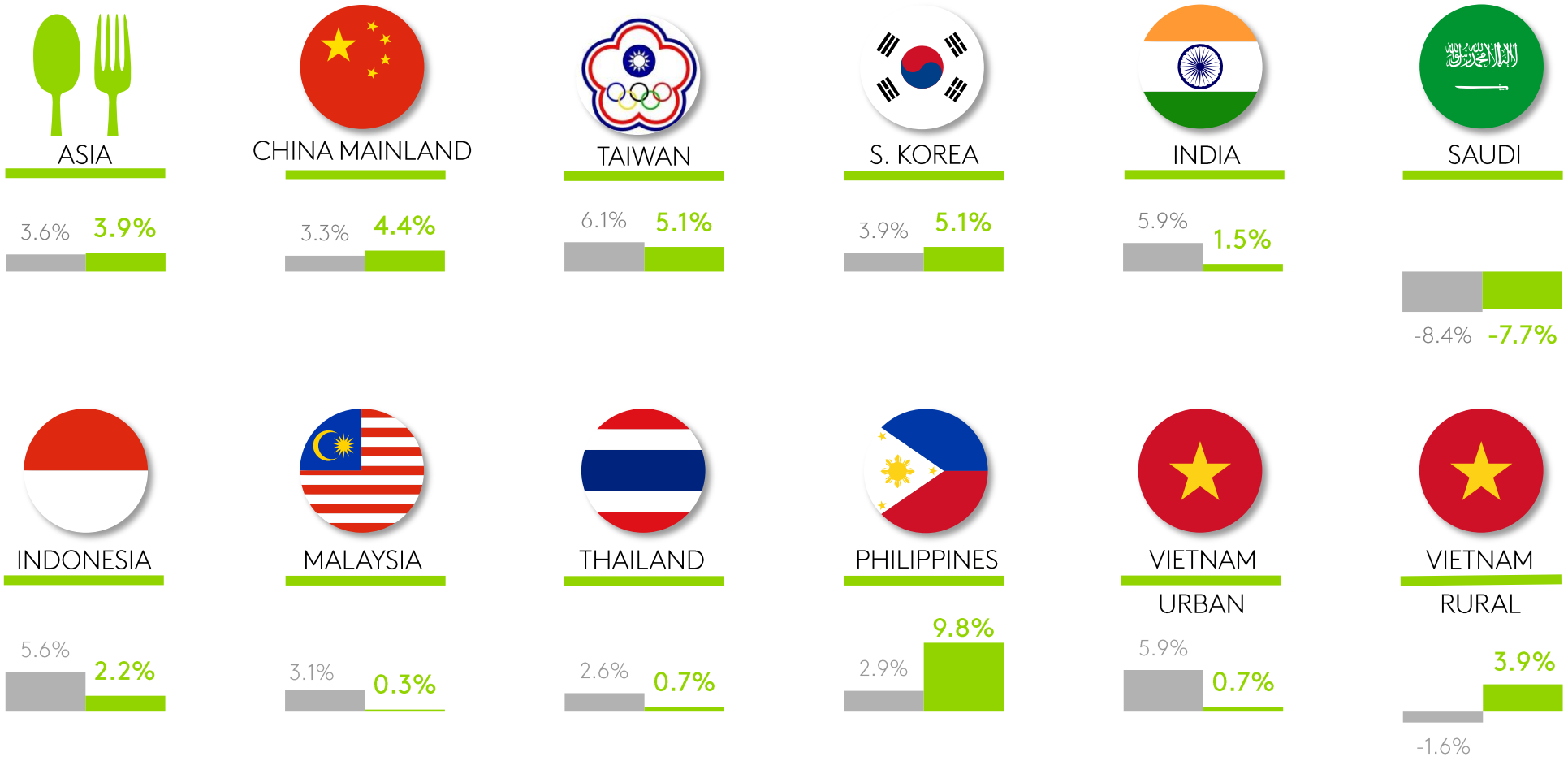
■ Q4'17 vs Q4'16 ■ Q4'18 vs Q4'17

FMCG: Consumer spending remains positive across Asia; Philippines the star performer from heavier basket size across demographics



ASIA / MAT Q4 2018 – Value Growth FMCG

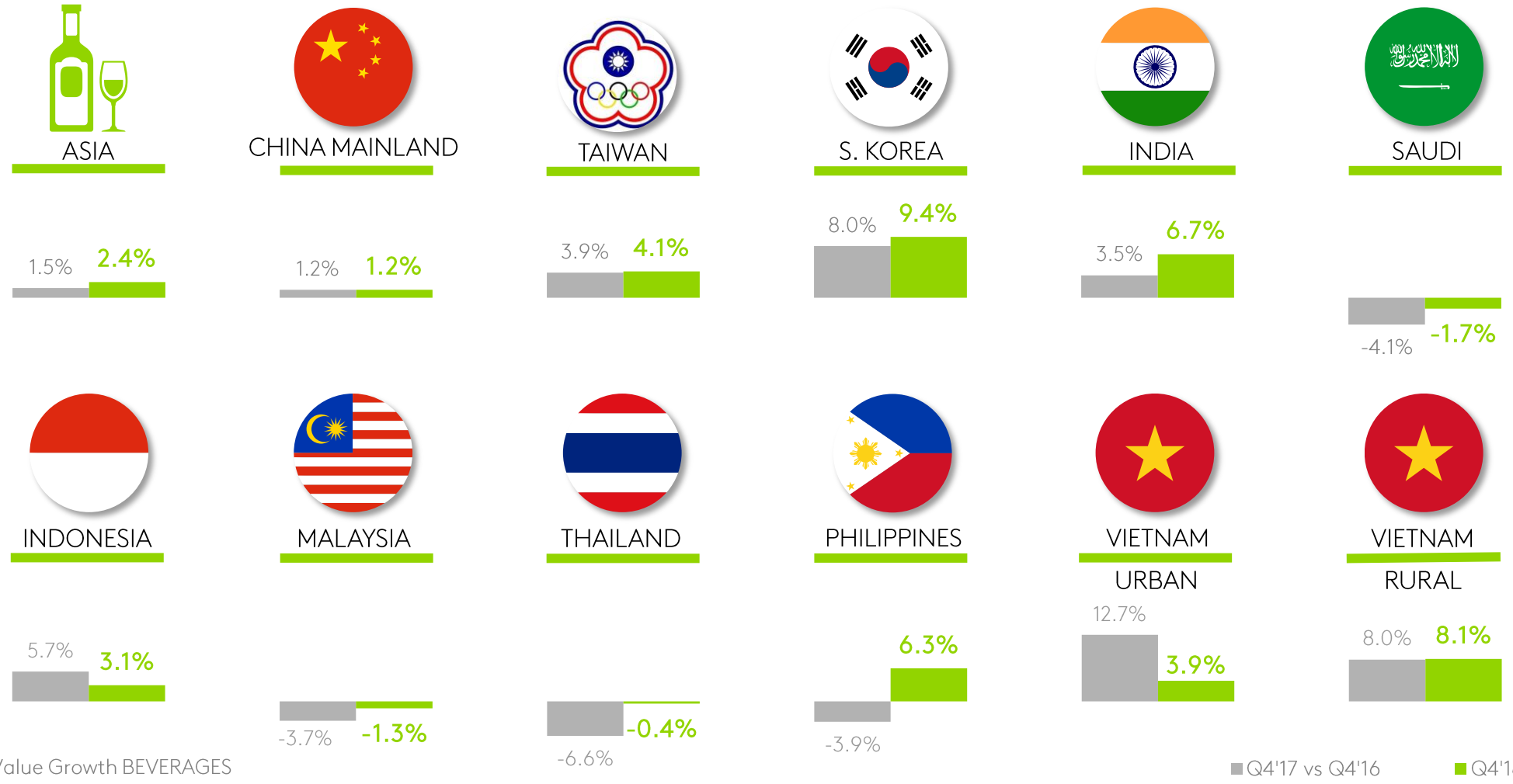
FOOD: Demand is stable with convenience food items posted growth in Korea, Philippines and Indonesia



ASIA / MAT Q4 2018 – Value Growth FOOD

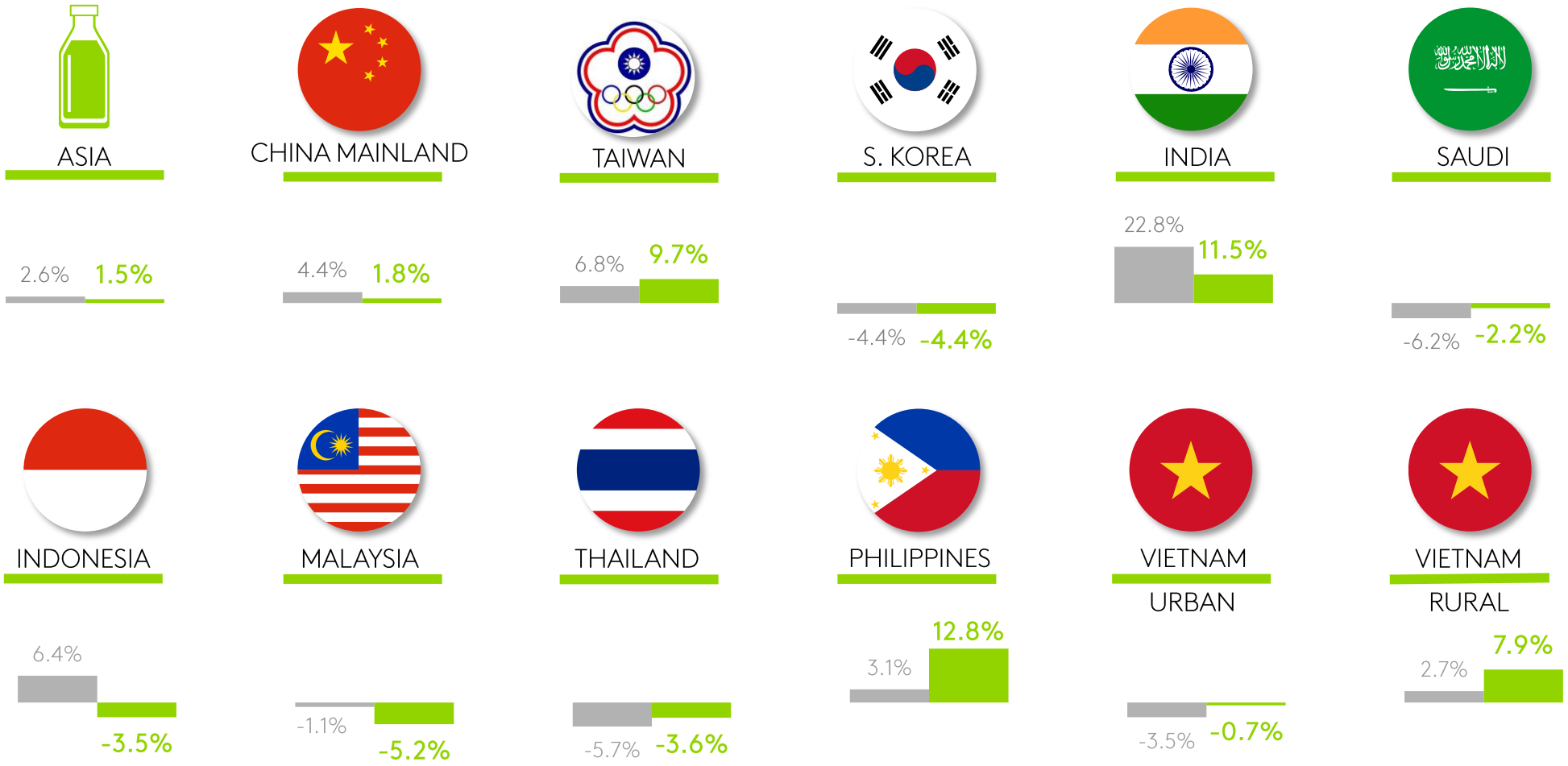
Q4'17 vs Q4'16 Q4'18 vs Q4'17

BEVERAGES: Stronger growth is registered; NPDs continue to drive consumers attention and growth in Taiwan



ASIA / MAT Q4 2018 – Value Growth BEVERAGES

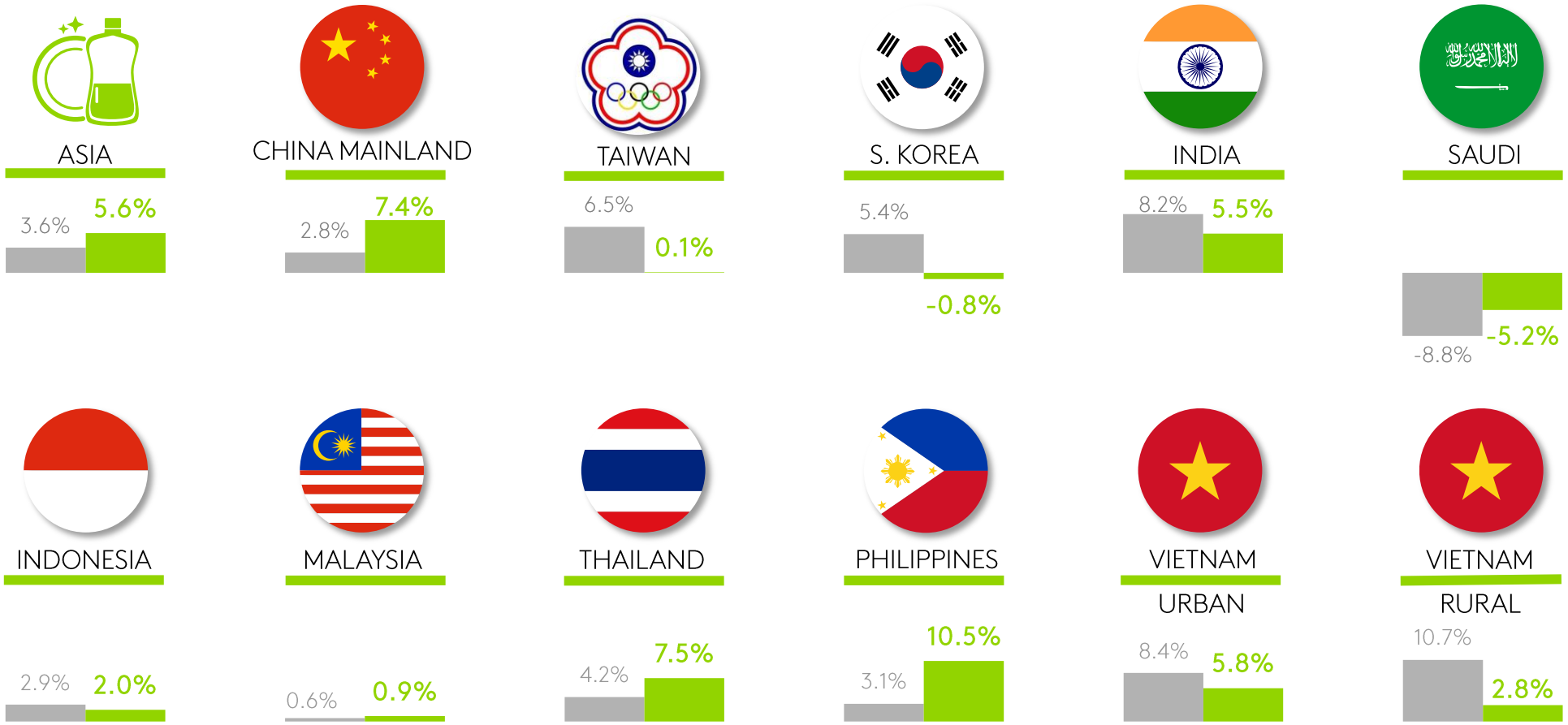
DAIRY: Growth has slowed down with Indonesia's decline mainly driven IFFO Gump



ASIA / MAT Q4 2018 – Value Growth DAIRY

Q4'17 vs Q4'16 Q4'18 vs Q4'17

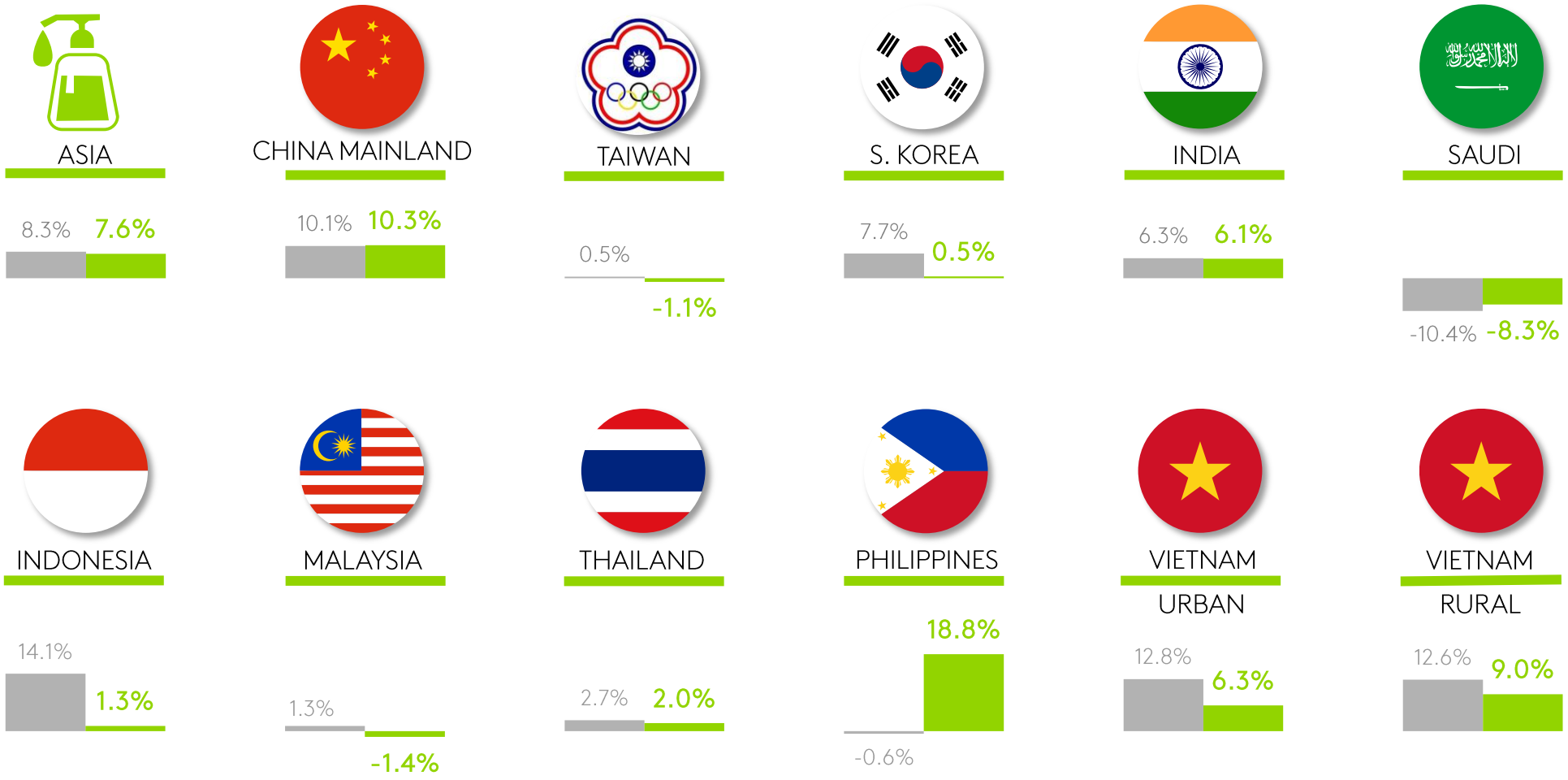
HOME CARE: Posted stronger growth this year with Thailand shoppers making heavier basket size



ASIA / MAT Q4 2018 – Value Growth HOME CARE

Q4'17 vs Q4'16 Q4'18 vs Q4'17

PERSONAL CARE: Growth remained stable in Q4 as self image continues to be important to Asia consumers



ASIA / MAT Q4 2018 – Value Growth PERSONAL CARE

Q4'17 vs Q4'16 Q4'18 vs Q4'17

MAT Q4 2018 | SUMMARY ASIA

CHINA MAINLAND

#EconomicOverview China's GDP grew by 6.4% in Q4 2018. The growth rate of the fast moving consumer goods accelerated during Q4 2018 vs Q4 2017, with value growth of 5.2%.

#WinterTrend Since people wear more clothes in the winter, fabric softener gained consumption with 20.7% value growth.

#Ecommerce continue to grow with 32% value growth compared to the same period of last year. However, spend per trip of e-commerce slowed down.

TAIWAN

#EconomicOverview Stock market was heating until the news of potential trade war. GDP and housing market smells uncertainty, although political election added positive news to boost faith.

#ShoppingSeasonfromEC With the exposure of Double 11 shopping, off-line retailers like Costco & PXM also created shopping holidays of their own, in attempt to fight back to win consumers.

#VolumeBuy&Frequency Consumer is willing to buy more to save money (per volume), this behavior favors growth of EC & Costco, as well as volume promotion by off-line retailers.

S.KOREA

#ConsumerPrices rose 1.3 percent in December vs a year ago on gains in agricultural and industrial goods and the service sector.

#RisingSauceMarket The growth of processed foods, especially the sauce market, is huge due to increase in single households and busy lifestyle. The sauce market size has expanded as a category, which was mainly comprises of meat sauce, has now been diversified into soup, fried food etc.

#RetroWithModernTwist New-tro, a new word combined with 'New' and 'Retro' is selected as one of the keywords that will lead the trend of the food and restaurant industry this year. Products that recall memories from the 1980s to the 1990s are being released again whilst restaurant with retro concept gains popularity.

MAT Q4 2018 | SUMMARY ASIA

INDIA

#EconomicOverview 2018 growth was led by favorable macros (GDP growth and Inflation) and manufacturers passing on the benefits of margin expansion coming out of GST regime.

#FastSales One of the main reason for growth has been the fast sales upsurge in modern trade (MT) channels in India

#SEC Spends across Socio Economic class had remained more or less stagnant

SAUDI ARABIA

#Economic Overview With macro economic indicators such as GDP growth rate, Consumer Confidence Index seeing a reversal in trends, rate of decline FMCG purchase has also been slowing down. 3 key highlights / truths of the FMCG shopping behaviour in Saudi Arabia that we need to keep in mind while tailoring our strategy

#FrequencyStretch People are shopping less often and it is increasingly difficult to get into the shopper's basket. Thus availability and visibility are key to product pick up off shelf

#PromoHunting Shoppers are visiting more stores in search of promotions. Thus is it is tailor your promotion strategy around hero SKUs. Promotions have become the new normal. Need to focus on brand building to establish a reason to buy with the shopper

INDONESIA

#Indonesian Consumers have expressed positive sentiments towards the economy, however rationalizing their FMCG consumption.

#Dairy continues on a decline despite the Family Milk Powder category showing significant gains and becoming one of the top growing categories.

#Rationalized FMCG spending is seen amongst consumers as frequency decline is recovering and basket size expansion is flat.

MAT Q4 2018 | SUMMARY ASIA

MALAYSIA

#NormalizingSentiments CSI has once again fell below 100 threshold

#Supermarket Malaysians are moving their purchases from other channel into Supermarket, buying more often in this channel.

#NeedBasedShopping In lieu with the tough economy, Malaysians continues to be more selective of categories and reducing on good to have categories.

THAILAND

#SlightRebound which mainly depends on growing trip spend, while remains continuous frequency cutback and challenge in attracting buyers

#ExpandingSmall&OnlineRetailers Smaller chained CVS and online are the key channels with growing penetration.

#LargerSpendonNon-chained effects from welfare card scheme remains, driving more spend/Household among non-chain SPM, local minimart & PVS

PHILIPPINES

#Economic Overview PH economy grew by 6.1% in Q4 2018, amid continued rise in inflation. FMCG spending moving faster from heavier basket size

#FaceandBody Filipino shoppers pay more attention to their skin care as face cream and lotions are gaining momentum

#HyperSuperPower Modern Trade continues to aggressively expand in the country, outgrowing traditional trade

VIETNAM

#StrongGrowth Vietnam's economy keep up its momentum, posting 7.08% YOY growth in 2018.

#DemandforHygiene Cleaning and hygiene products are on the rise and expand consumer base.

#GrowingChannels More Vietnamese shoppers prefer shopping at modern and specialty store formats.

Top 5 Categories with Positive Impact – MAT Q4'18 vs Q4'17

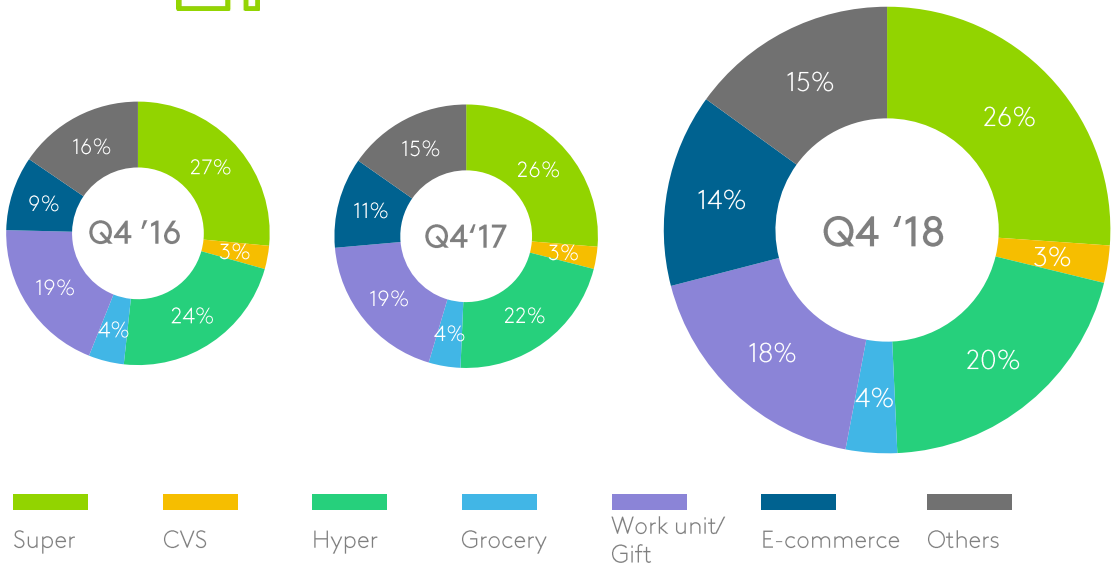
Value	Volume	Penetration
SOYBEAN MILK	SOYBEAN MILK	OYSTER SAUCE
OYSTER SAUCE	KITCHEN ROLLS	KITCHEN ROLLS
HAIR COLORANT	OYSTER SAUCE	TOLIET PERFUME
FABRIC SOFTENER	NUTRIENT SUPPLIMENT	MAKE UP
TOLIET PERFUME	WET TISSUES	NUTRIENT SUPPLIMENT

% Change FMCG Basket per Social Economic Level

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

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

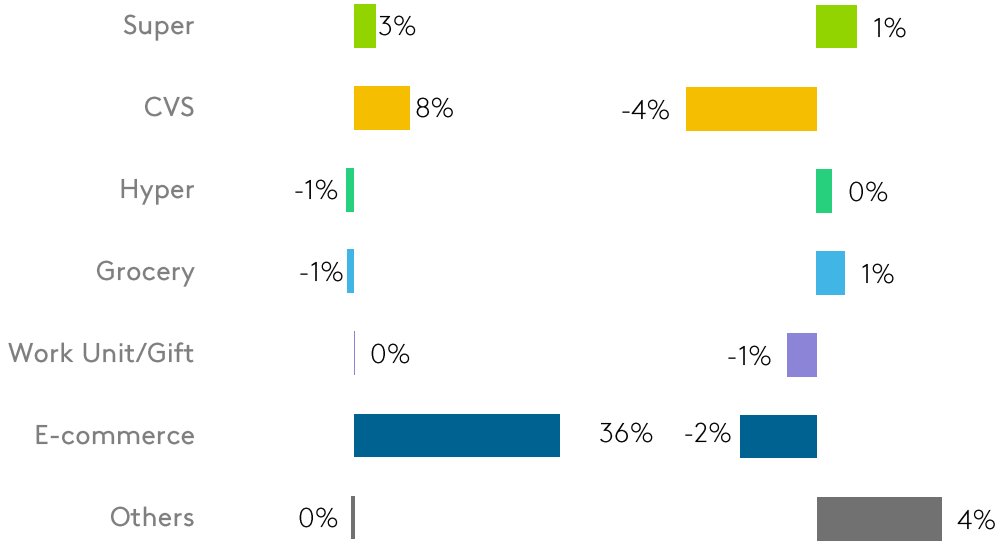
Channel Importance - %Value



MAT Q4'18 v Q4'17

Shopping Occasions

Spend/Trip



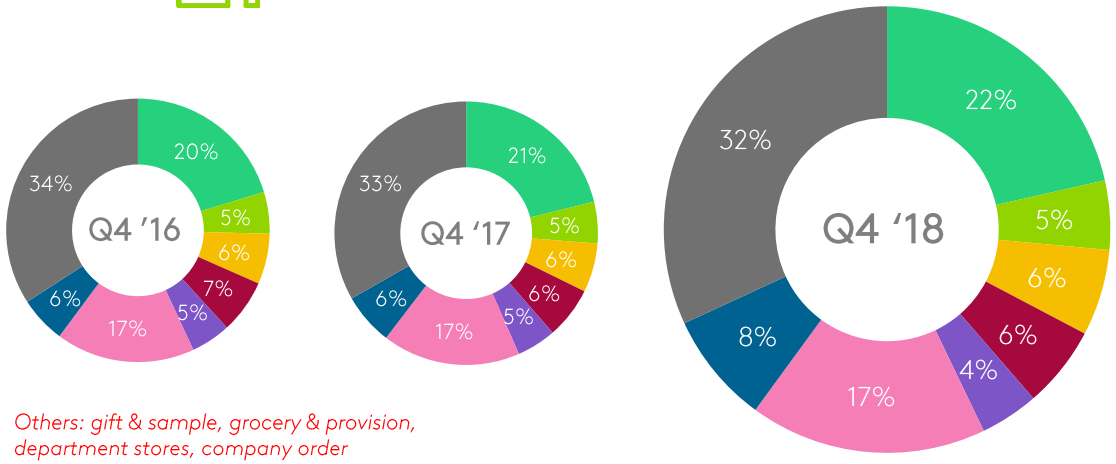
Top 5 Categories with Positive Impact – MAT Q4'18 vs Q4'17

Value	Volume	Penetration
Bird's Nest	RTE Breakfast Cereal	Wet Tissue
Packaged Water	Mouthrinse	RTE Breakfast Cereal
Deodorants	Packaged Water	Mouthrinse
RTE Breakfast Cereal	Bird's Nest	Olive / Corn Oil
Lipstick	Chocolate Confectione	Bird's Nest

% Change FMCG Basket per Social Economic Level

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

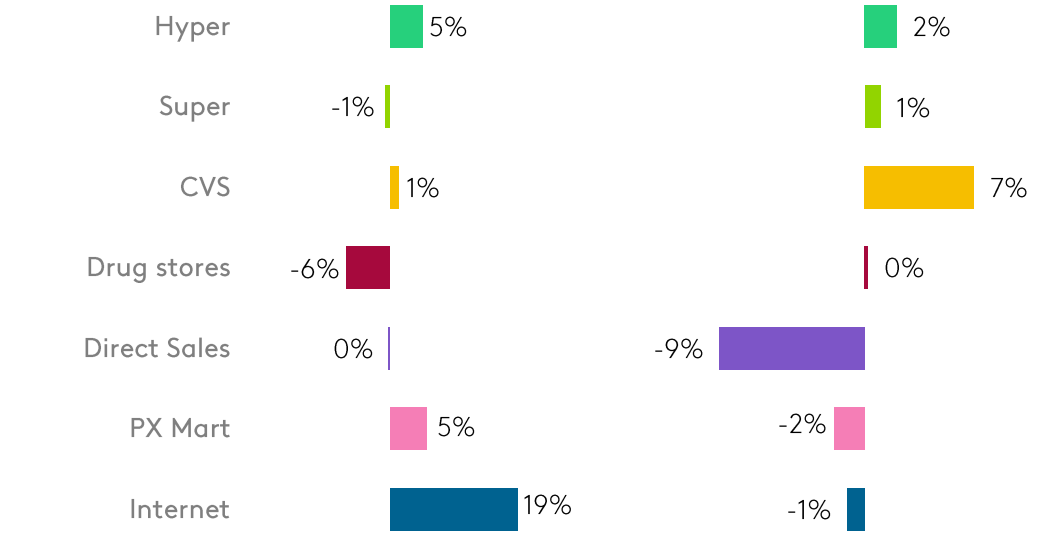
Channel Importance - %Value



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

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

MAT Q4'18 v Q4'17



Top 5 Categories with Positive Impact – MAT Q4'18 vs Q4'17

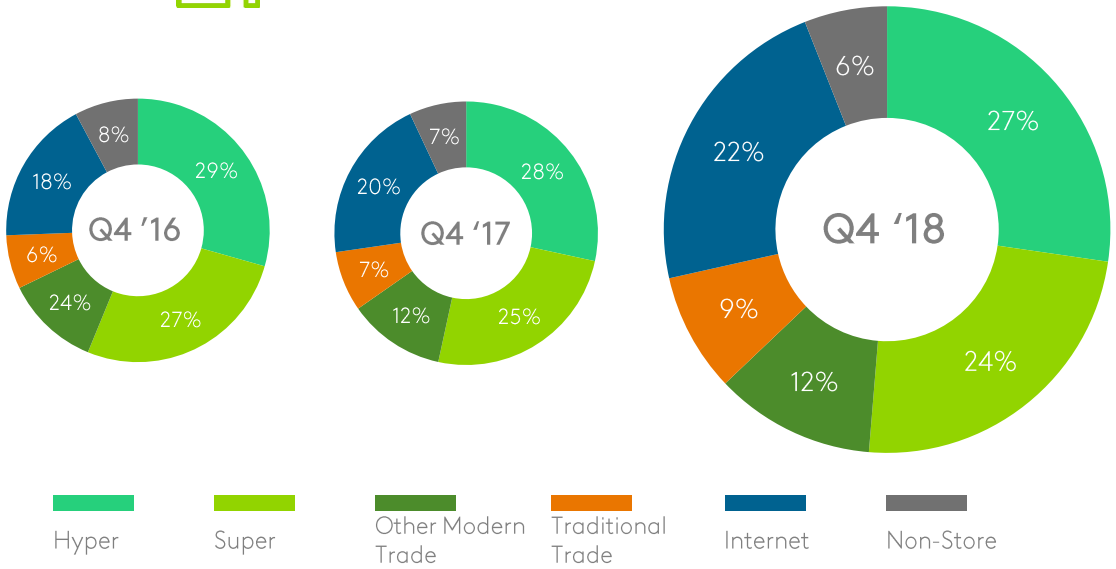
Value	Volume	Penetration
Coffee Drink	Coffee Drink	Barbeque Sauce
Retort	Retort	Retort
Kimchi	Seasoning	Seasoning
Frozen Food	Kimchi	Coffee Drink
Seasoning	Hair Treatment	Sauce

% Change FMCG Basket per Social Economic Level

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

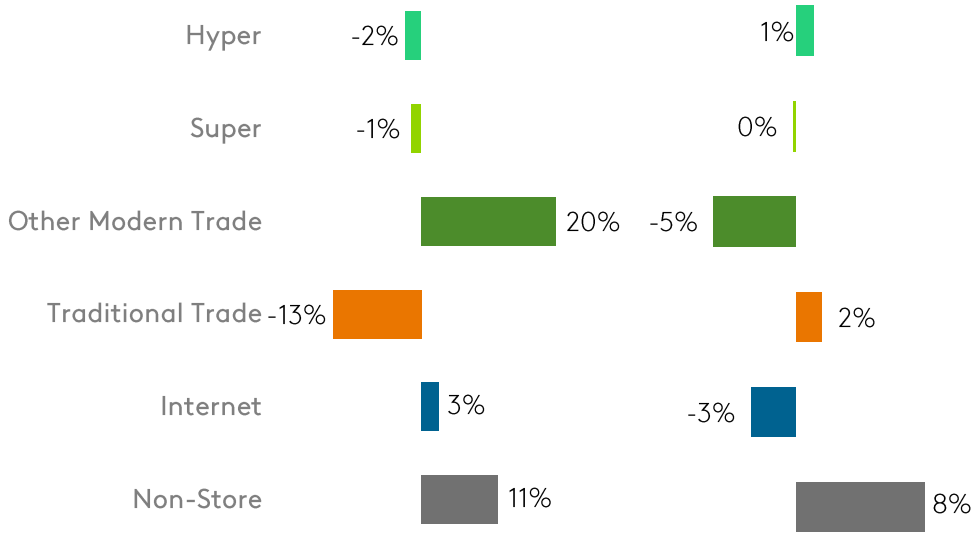
Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

Channel Importance - %Value



MAT Q4'18 v Q4'17

Shopping Occasions / Spend/Trip



Top 5 Categories with Positive Impact – MAT Q4'18 vs Q4'17

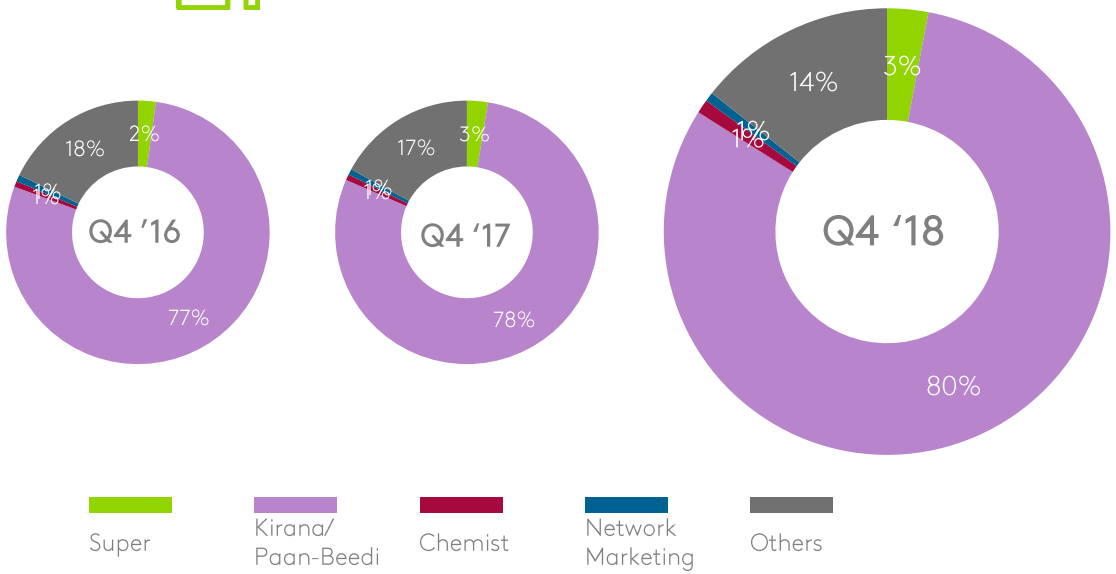
Value	Volume	Penetration
Sanitary Napkins	Sauces/Ketchups	Toilet/Bathroom Cleaners
Shaving Blades	Sanitary Napkins	Sanitary Napkins
Sauces/Ketchups	Basmati Rice	Basmati Rice
Basmati Rice	Toilet/Bathroom Cleaners	Coffee
Optical Whiteners	Insecticides	Sauces/Ketchups

% Change FMCG Basket per Social Economic Level

MAT	Q1'18 VS Year Ago	Q2'18 VS Year Ago	Q3'18 VS Year Ago	Q4'18 VS Year Ago
Total SEC	Growth > 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%
SEC AB	Growth > 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%
SEC C	Growth > 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%
SEC D/E	Growth > 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%

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

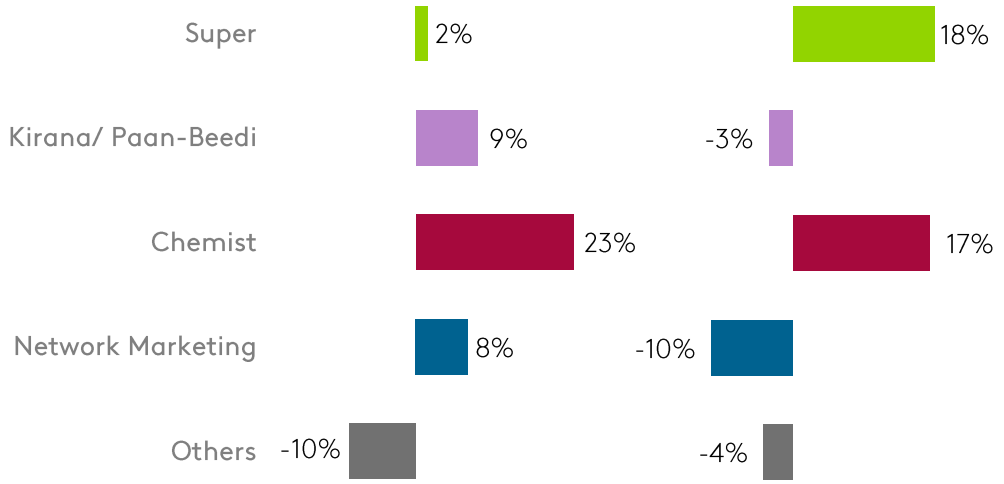
Channel Importance - %Value



MAT Q318 v Q3'17

Shopping Occasions

Spend/Trip



SAUDI ARABIA

Top 5 Categories with Positive Impact

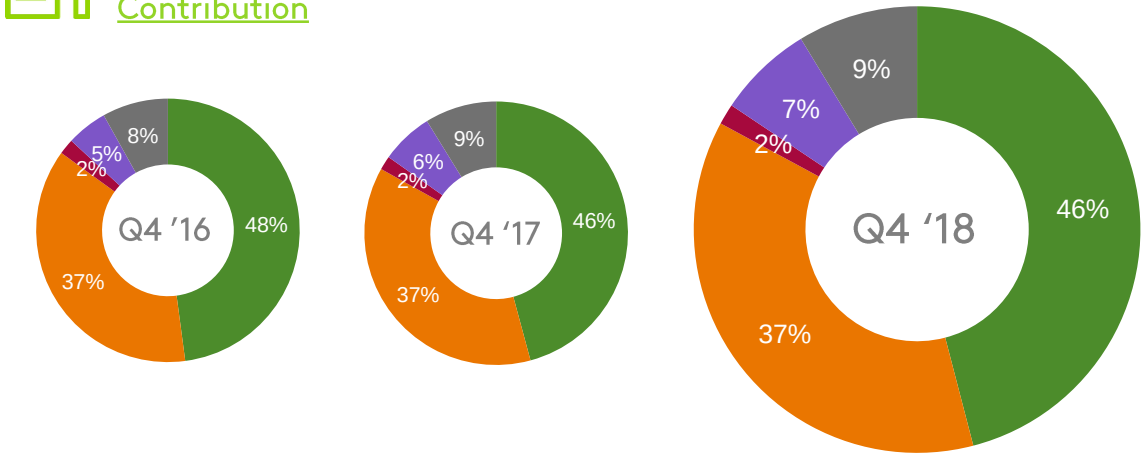
Value	Volume	Penetration
Multipurpose Cleaners	Rolls/ Towels Personal Use	Liquid Concentrates
Powder Concentrates	Powder Concentrates	Dessert Mixes
Liquid Concentrates	Liquid Concentrates	Powder Concentrates
Carbonated Soft Drinks (CSD	Dry Tissue	Evaporated Milk
Shower Gels	Multipurpose Cleaners	Fresh Plain Milk

% Change FMCG Basket per Social Economic Level

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

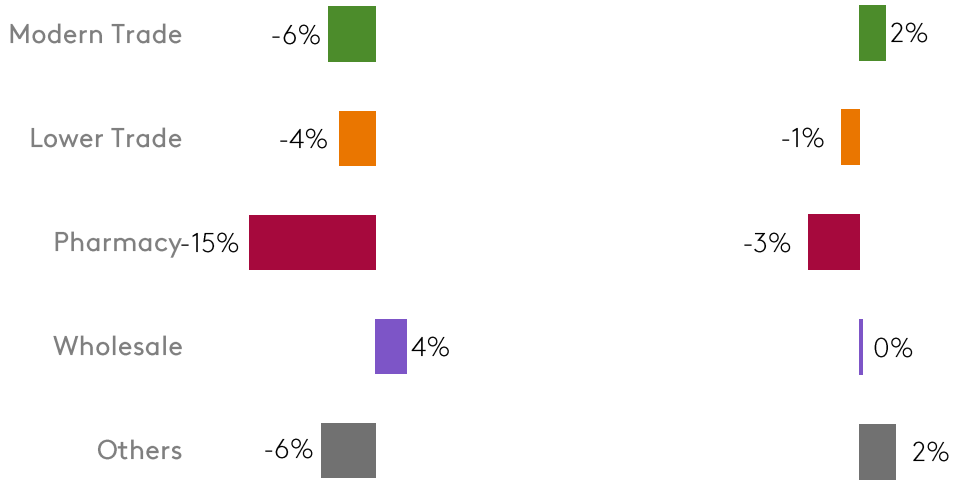
● Growth ≤ -0.5% ● -0.5% < Growth ≤ 5% ● Growth > 5%

Channel Importance - %Value Contribution



Modern Trade | Lower Trade | Pharmacy | Wholesale | Others

Shopping Occasions / Spend/Trip



MAT Q4'18 v Q4'17

INDONESIA

Top 5 Categories with Positive Impact – MAT Q4'18 vs Q4'17*

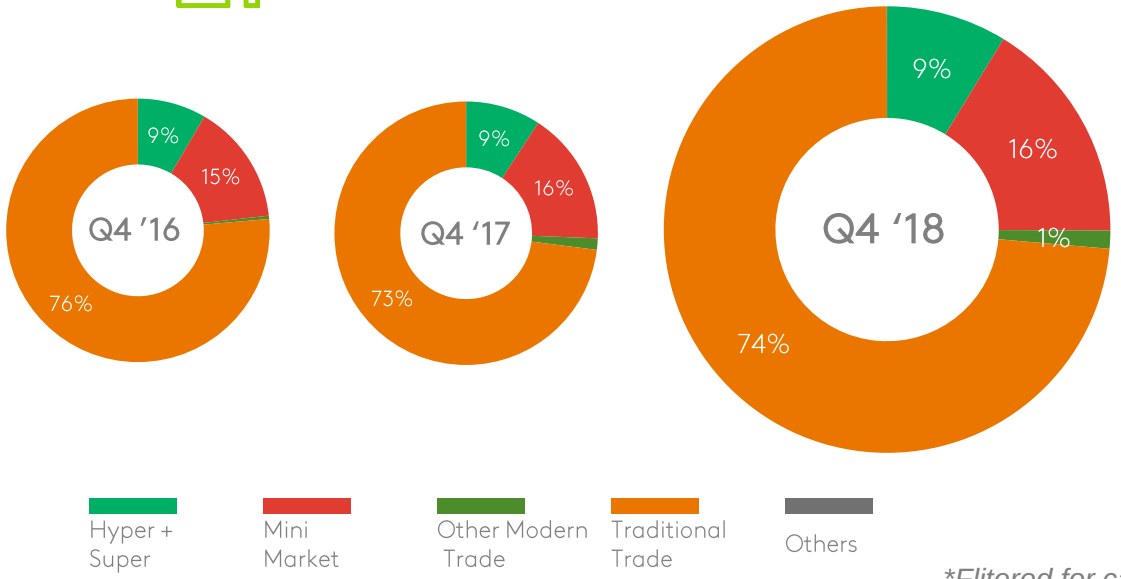
Value	Volume	Penetration
Lip Cosmetic	Lip Cosmetic	Family Milk Powder
Facial Cosmetic	Malted/Chocolate Drink	Lip cosmetic
RTD Coffee	Hot Cereal/Cereal Bev	RTD Coffee
Tea Instant	Family Milk Powder	Cordials (Liquid)
Family Milk Powder	RTD Coffee	Cooking Oil

% Change FMCG Basket per Social Economic Level

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

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

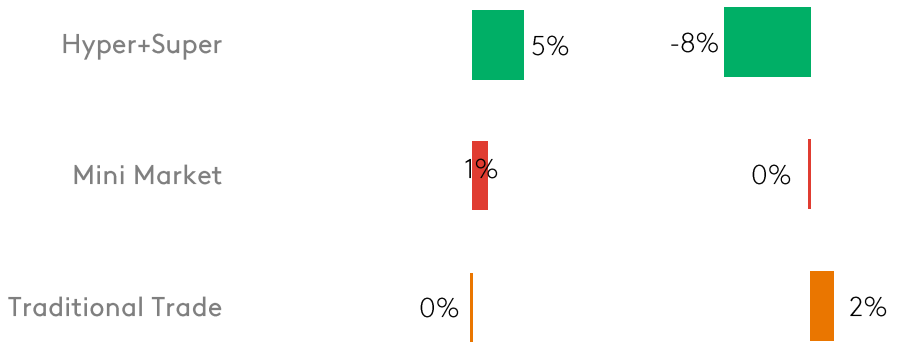
Channel Importance - %Value



MAT Q4'18 v Q4'17

Shopping Occasions

Spend/Trip



*Flitered for categories > 25% penetration

Top 5 Categories with Positive Impact – MAT Q4'18 vs Q4'17

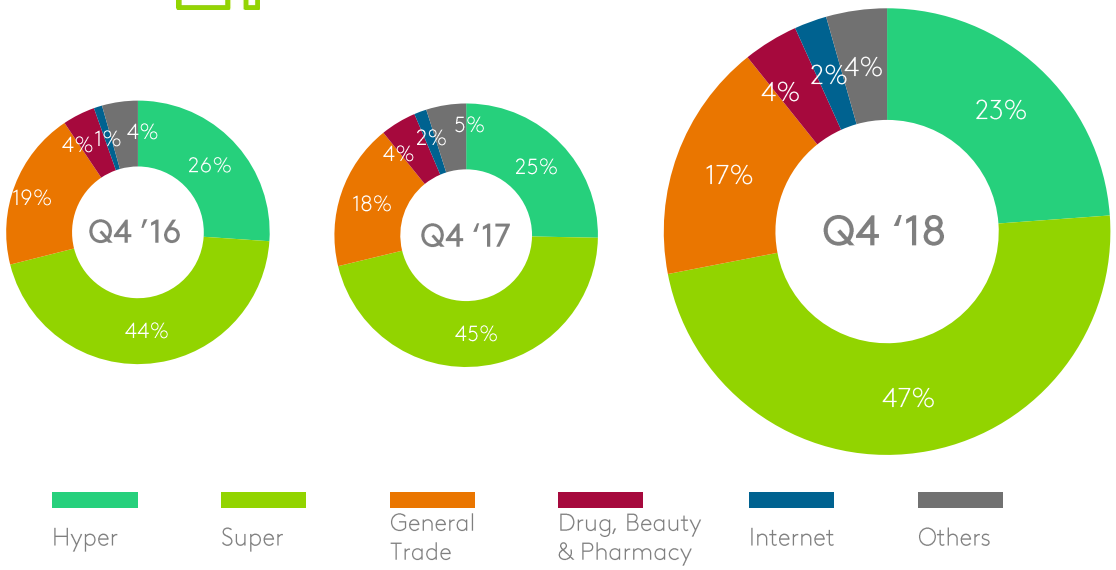
Value	Volume	Penetration
Butter	Adult Milk Powder	Liquid Soap
Adult Milk Powder	Face Moisturisers	Face Moisturisers
RTD Tea	MSG	Butter
MSG	Drinking Water	Facial Cleanser
Bouilon	Bouilon	Seasoning Powder

% Change FMCG Basket per Social Economic Level

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

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

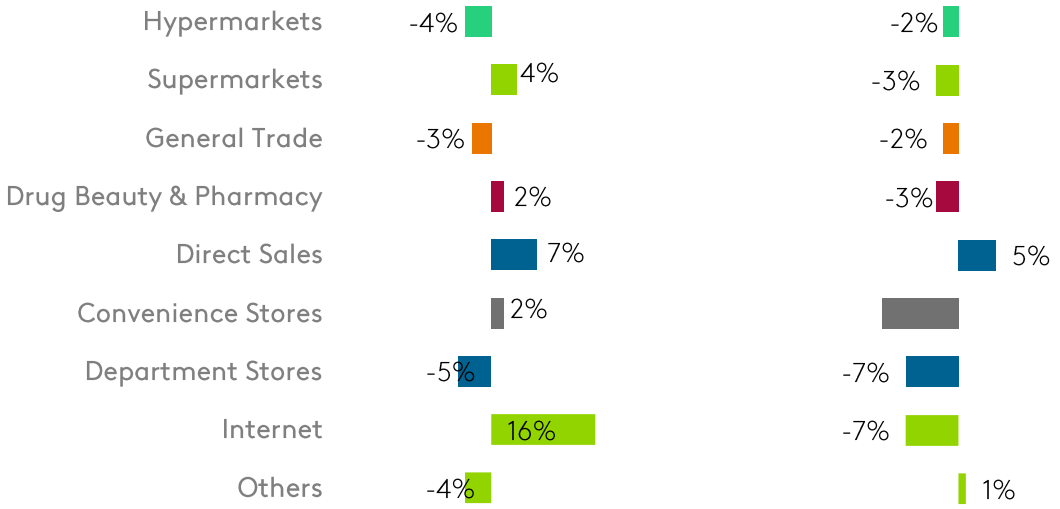
Channel Importance - %Value



MAT Q418 v Q4'17

Shopping Occasions

Spend/Trip



THAILAND

Top 5 Categories with Positive Impact – MAT Q4'18 vs Q4'17

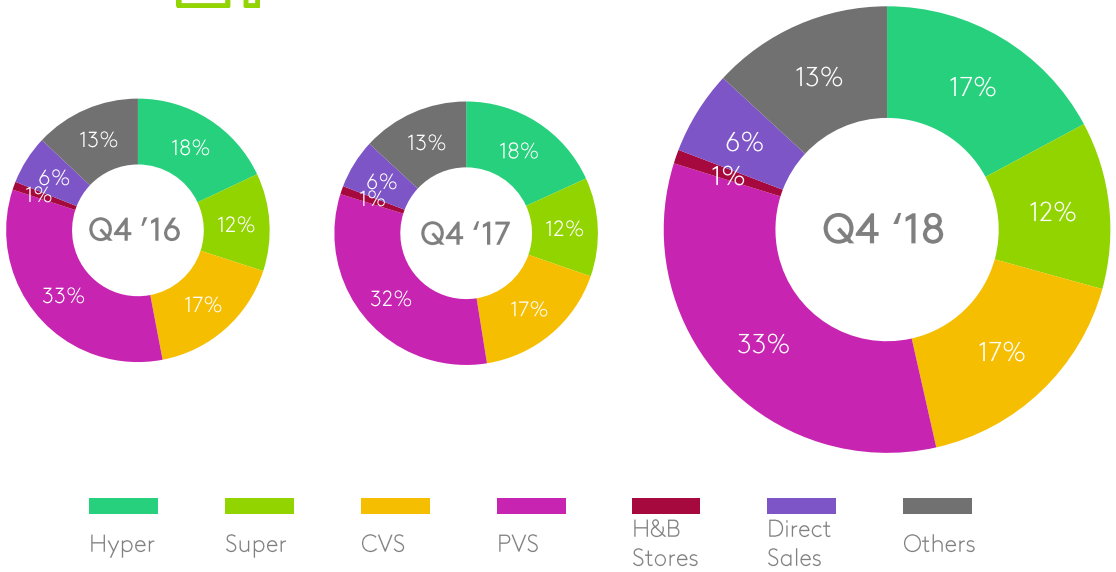
Value	Volume	Penetration
Fabric Softener	RTD TFD	Condensed Milk
Pet food	Liquid Milk	Deodorant
Dish Wash	Bottle Water	Bottle Water
Condensed Milk	Toothbrush	Total Detergent
Total Detergent	Fabric Softener	Energy Drink

% Change FMCG Basket per Social Economic Level

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

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

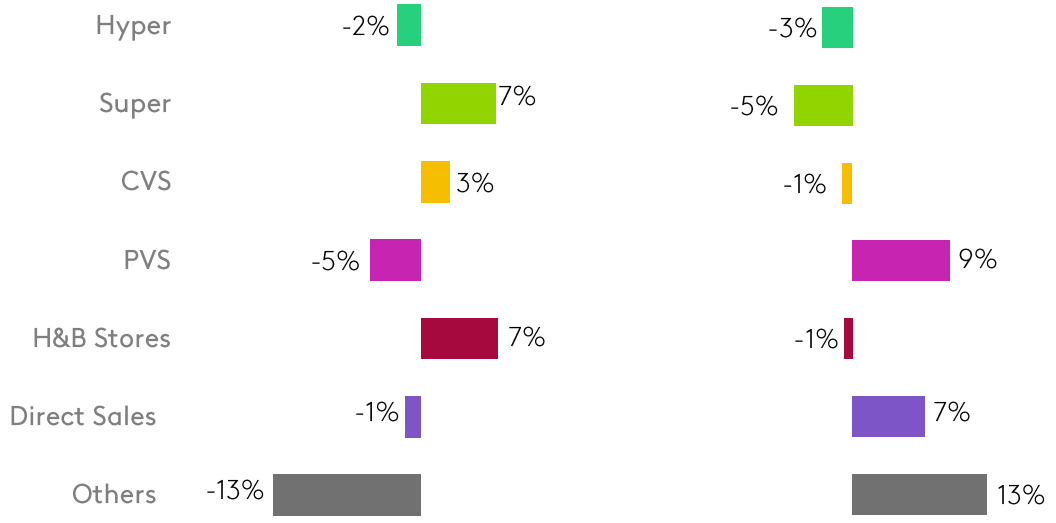
Channel Importance - %Value



MAT Q4'18 v Q4'17

Shopping Occasions

Spend/Trip



PHILIPPINES

Top 5 Categories with Positive Impact – MAT Q4'18 vs Q4'17

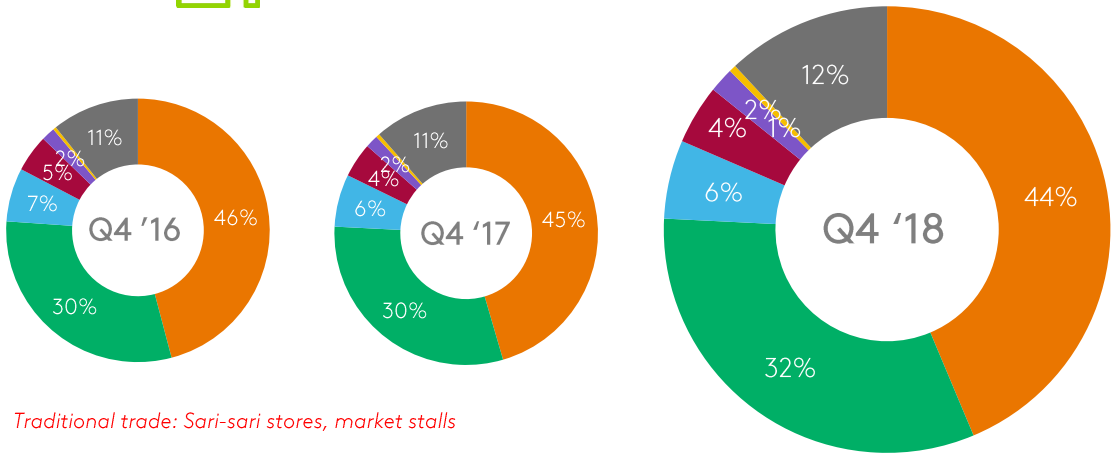
Value	Volume	Penetration
Baby Wipes	Face Cream	Baby Wipes
Face Cream	Baby Wipes	Packaged Water
Toothbrush	Dishwash	Scouring Pad
Lotion	Lotion	Lotion
Spam/Luncheon Meat	Spam/Luncheon Meat	Dishwash

% Change FMCG Basket per Social Economic Level

MAT	Q1'18 VS Year Ago	Q2'18 VS Year Ago	Q3'18 VS Year Ago	Q4'18 VS Year Ago
Total	Growth ≤ -0.5%	-0.5% < Growth ≤ 5%	Growth > 5%	Growth > 5%
SEC E	-0.5% < Growth ≤ 5%	Growth > 5%	Growth > 5%	Growth > 5%
SEC D	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	Growth > 5%	Growth > 5%
SEC ABC	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth > 5%	Growth > 5%

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

Channel Importance - %Value

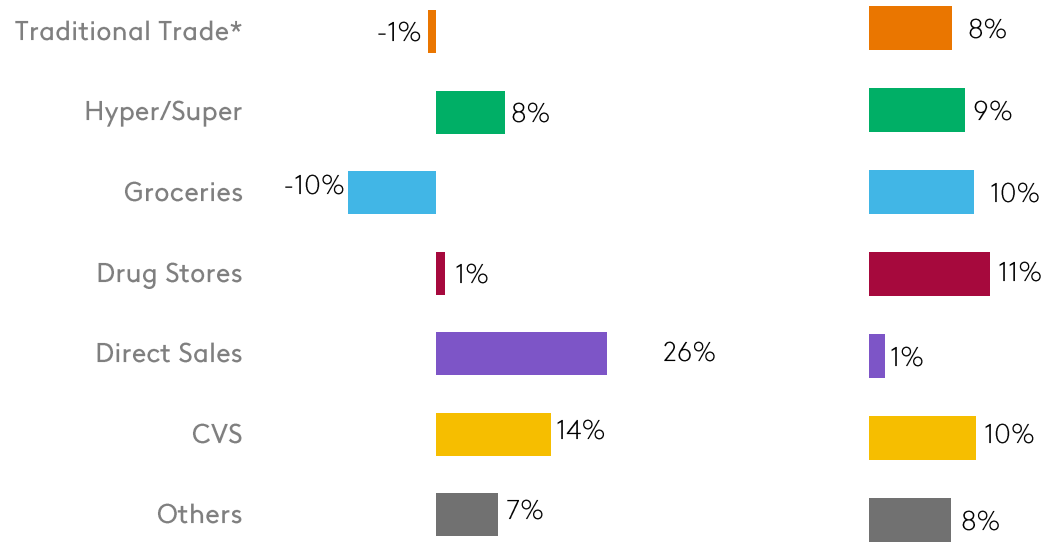


Traditional trade: Sari-sari stores, market stalls

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

MAT Q4'18 v Q4'17

Shopping Occasions / Spend/Trip



VIETNAM URBAN

Top 5 Categories with Positive Impact – MAT Q4'18 vs Q4'17

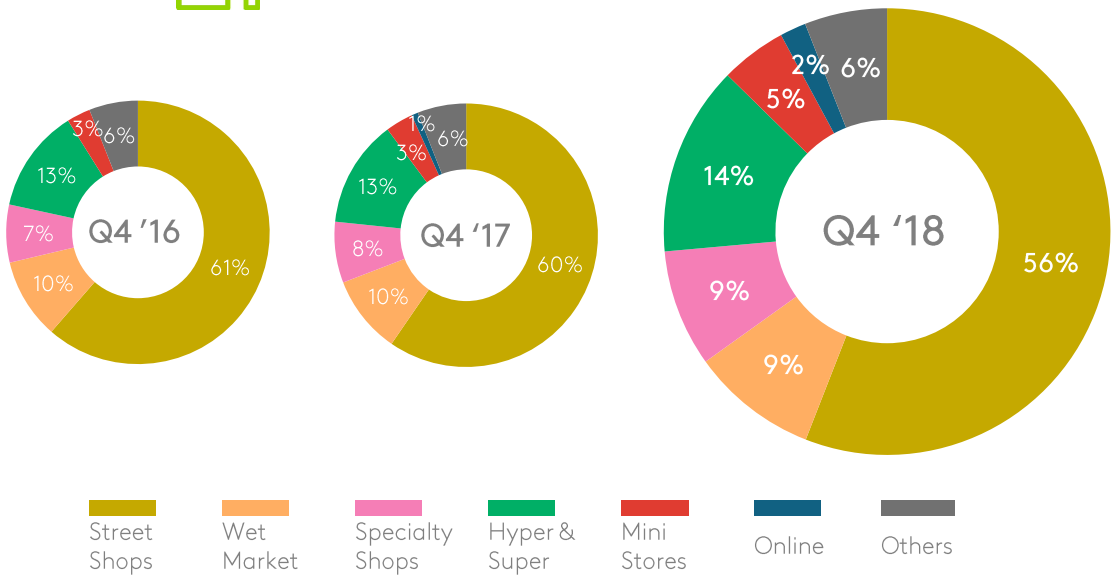
Value	Volume	Penetration
Mask	Liquid Detergent	Liquid Detergent
Liquid Detergent	Box Tissue	Pies
Pies	Ready-to-drink Tea	Chili Sauce
Box Tissue	Lipstick	Hand Washing
Ready-to-drink Tea	Pies	Toilet Cleaner

% Change FMCG Basket per Social Economic Level

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

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

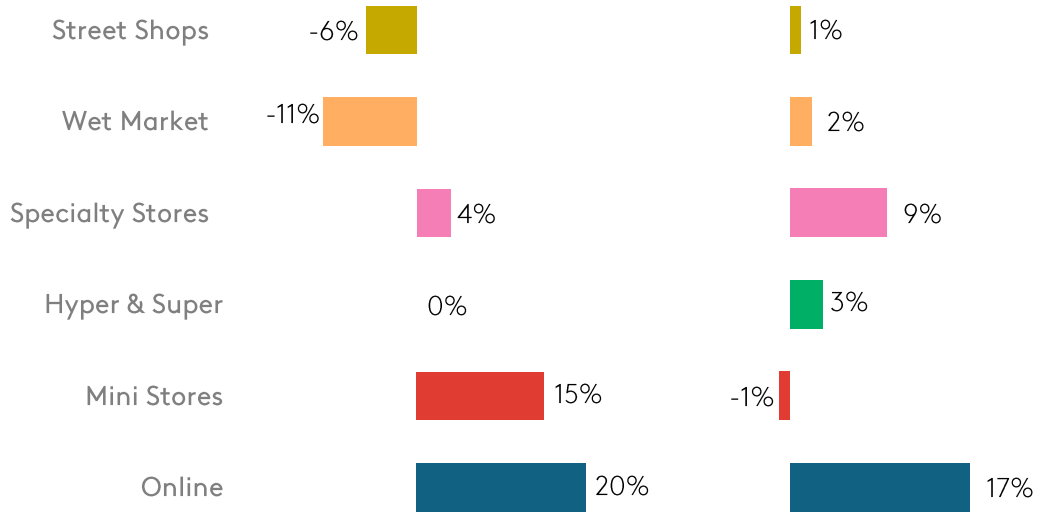
Channel Importance - %Value



MAT Q4'18 v Q4'17

Shopping Occasions

Spend/Trip



VIETNAM RURAL

Top 5 Categories with Positive Impact – MAT Q4'18 vs Q4'17

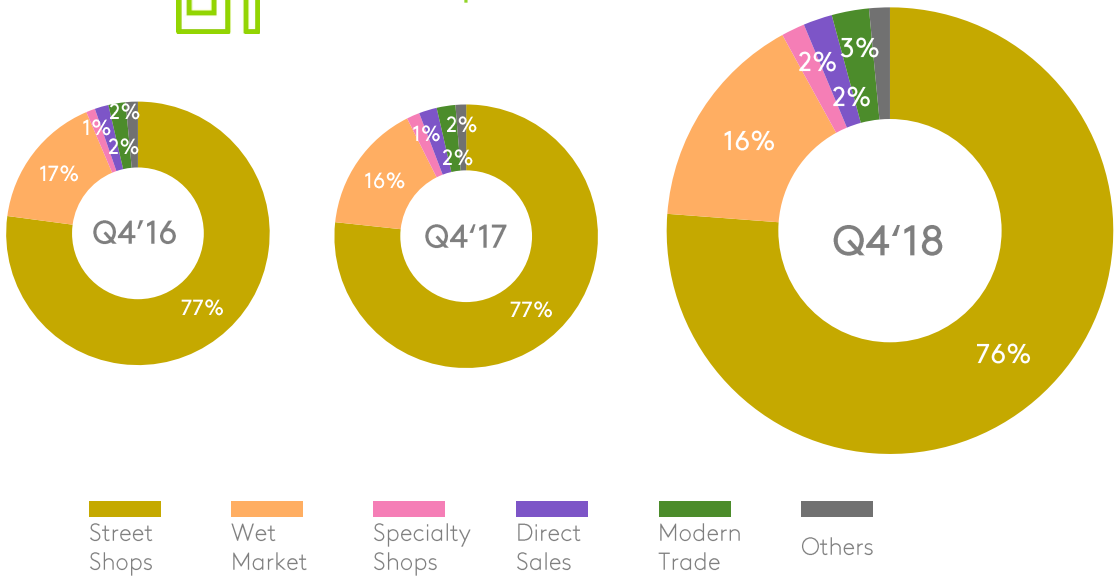
Value	Volume	Penetration
Hand Washing	Hybrid Drink	Hand Washing
Hybrid Drink	Ready-to-drink Growing Up Milk	Liquid Detergent
Functional Drinking Yogurt	Liquid Detergent	Table Napkins
Liquid Detergent	Liquid Tonic Food Drink	Soft Cakes
Liquid Tonic Food Drink	Functional Drinking Yogurt	Ready-to-drink Growing Up Milk

% Change FMCG Basket per Social Economic Level

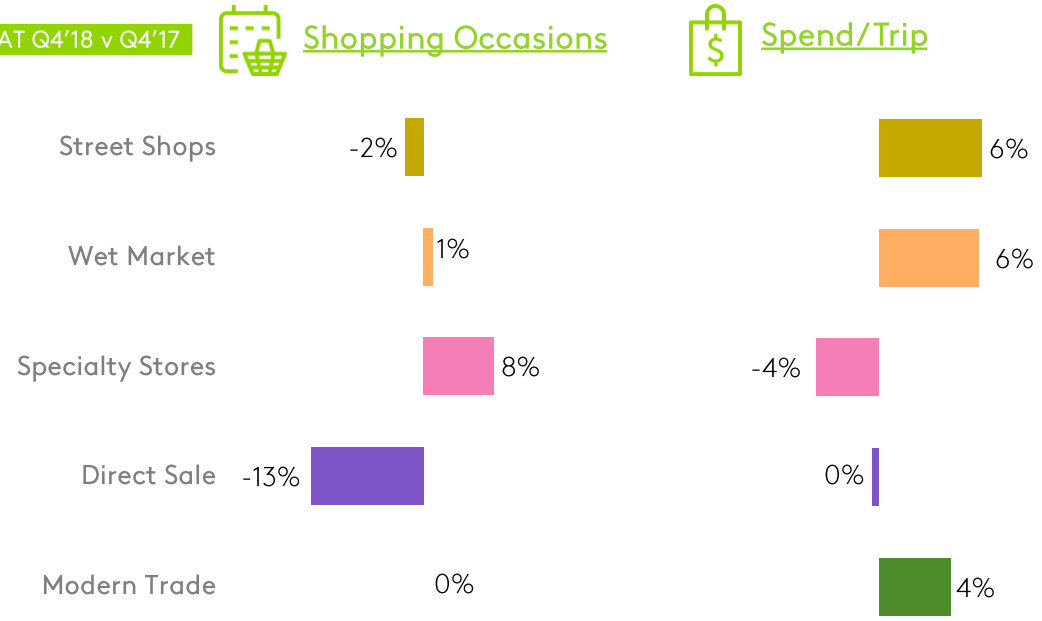
MAT	Q1'18 VS Year Ago	Q2'18 VS Year Ago	Q3'18 VS Year Ago	Q4'18 VS Year Ago
Total	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%
Low Income	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth ≤ -0.5%	-0.5% < Growth ≤ 5%
Mid Income	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth ≤ -0.5%
Mid-High Income	Growth >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

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

Channel Importance - %Value



MAT Q4'18 v Q4'17



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