Taiwan FMCG Monitor

2014 Q4

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2014 Q4 KEY ECONOMICS

+3.35 GDP VSLY Q4

+1.37% CPI VSLY December

3.79% Unemployment rate December

+1% Total FMCG VSLY

- The FMCG Market presents a stagnant trend due to several food safety issues in 2014.
- The consumers reduce buying frequency and tend to purchase products with higher quality and relatively in higher prices.
- The growth of skin care products slows down, making the non-food category perform mildly.
- Under a depressed market environment, the sales value in PX mart, Costco and online retailers still show growth.

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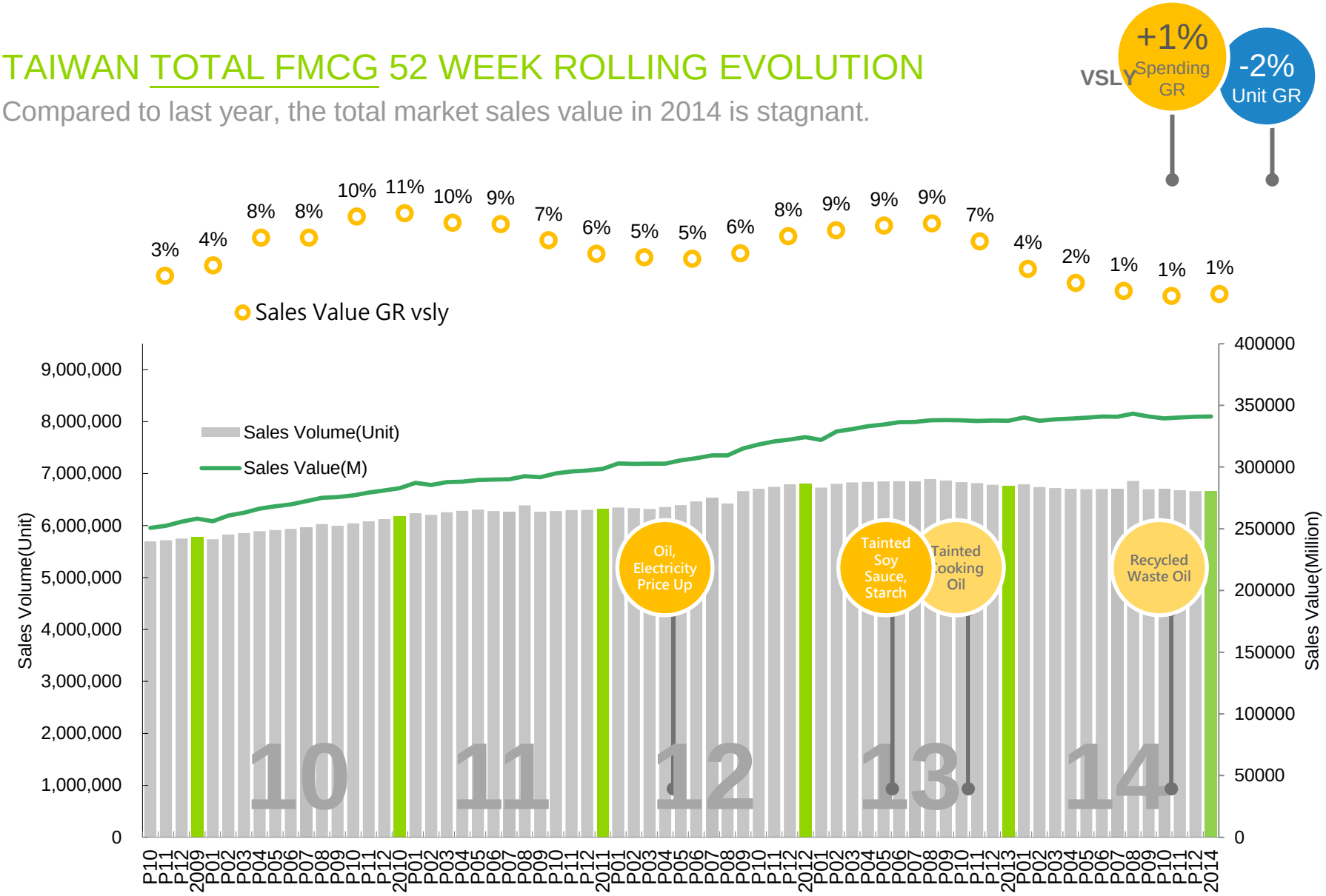
TAIWAN TOTAL FMCG 52 WEEK ROLLING EVOLUTION

Compared to last year, the total market sales value in 2014 is stagnant.



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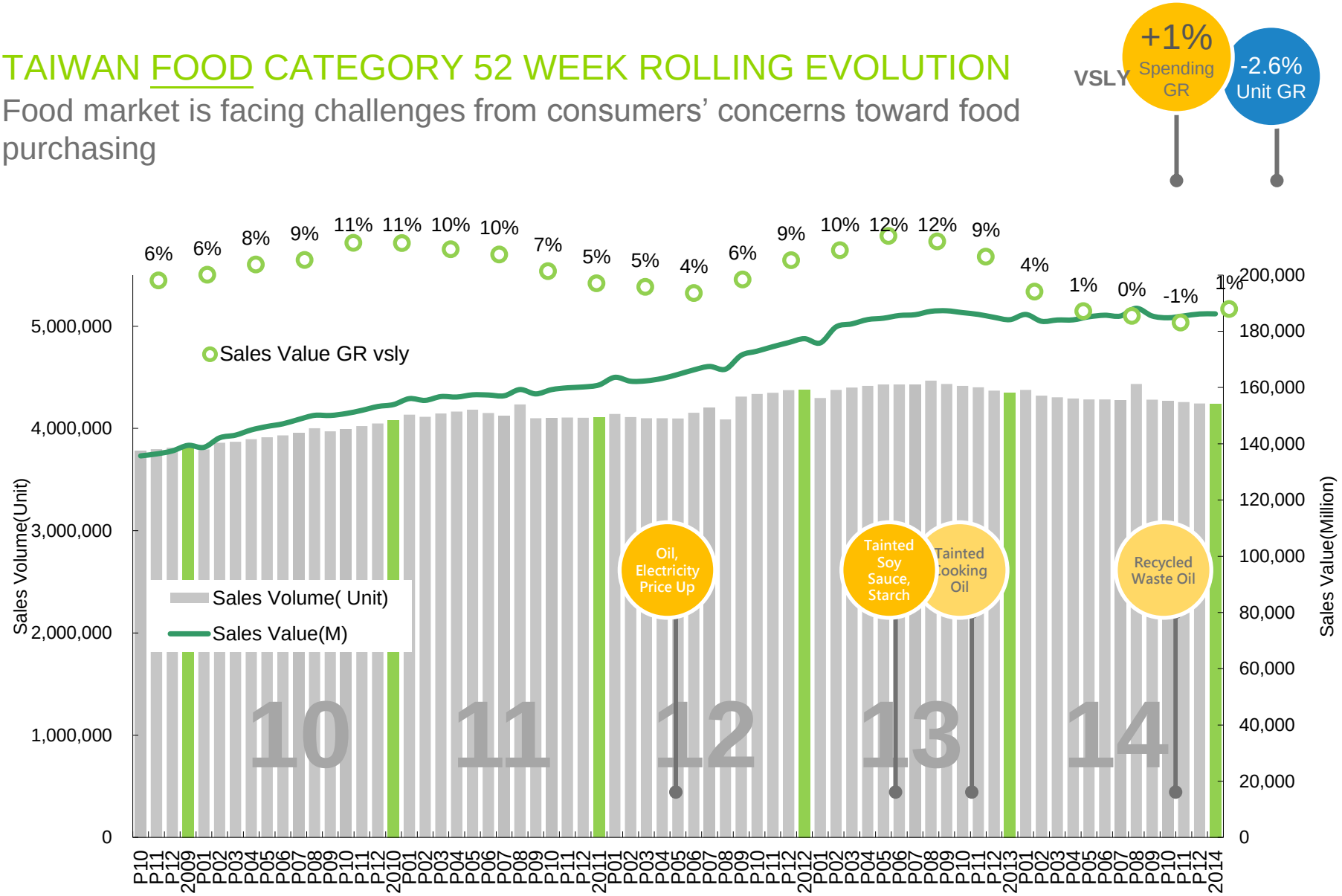
TAIWAN FOOD CATEGORY 52 WEEK ROLLING EVOLUTION

Food market is facing challenges from consumers' concerns toward food purchasing



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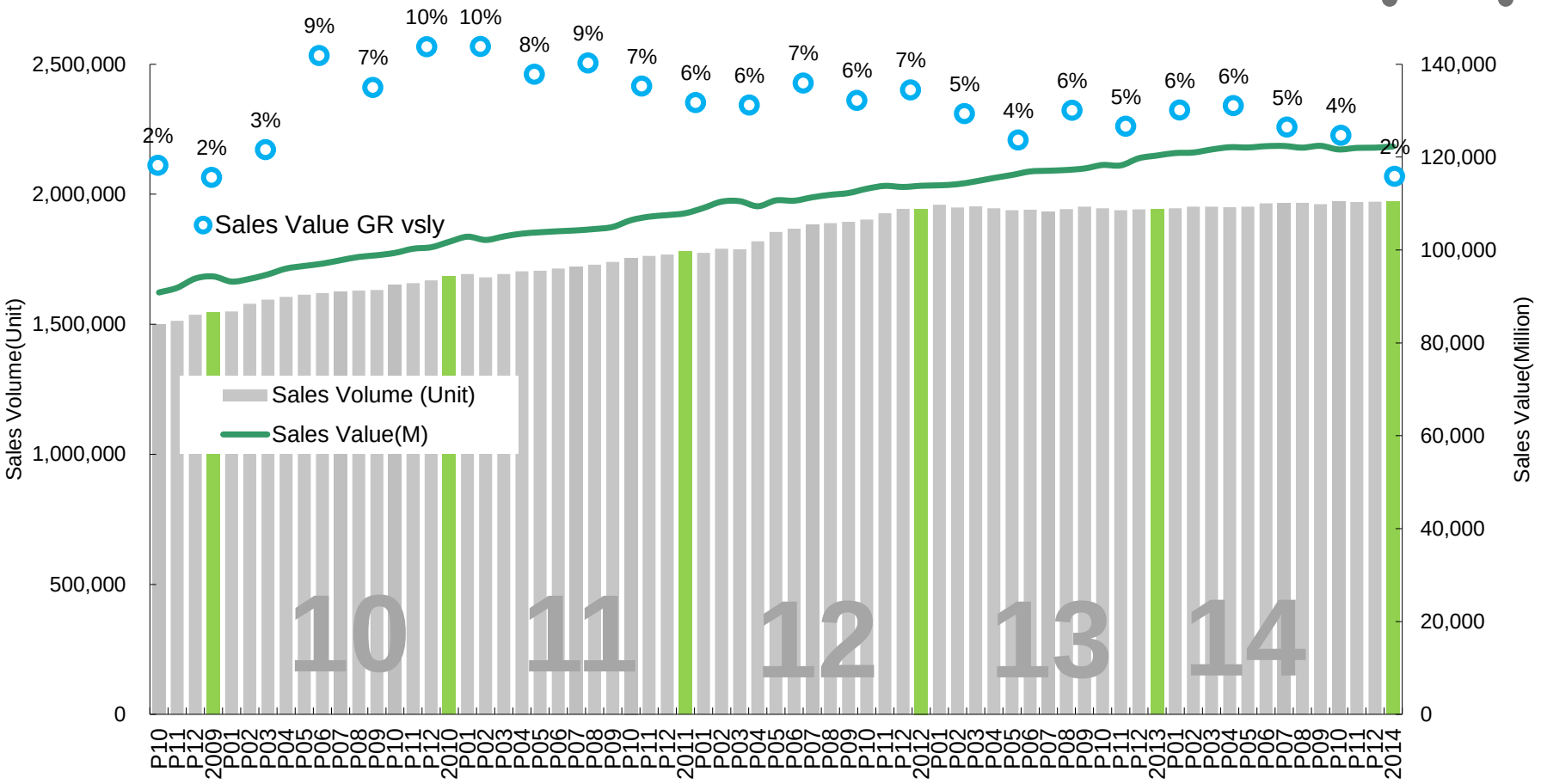
TAIWAN NON-FOOD CATEGORY 52 WEEK ROLLING EVOLUTION

The growth driven by skin care products has slowed down, making non-food category performs mildly.

VSLY +2% Spending GR +2% Unit GR



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FOOD CATEGORIES

Instant Noodles

Dairy

Packet Noodles

Soy Sauce

GR>5%

-0.5%<GR<5%

GR<-0.5%

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NON-FOOD CATEGORIES

Skin Care

Detergent

Tissue

GR>5% -0.5%<GR<5% GR<-0.5%

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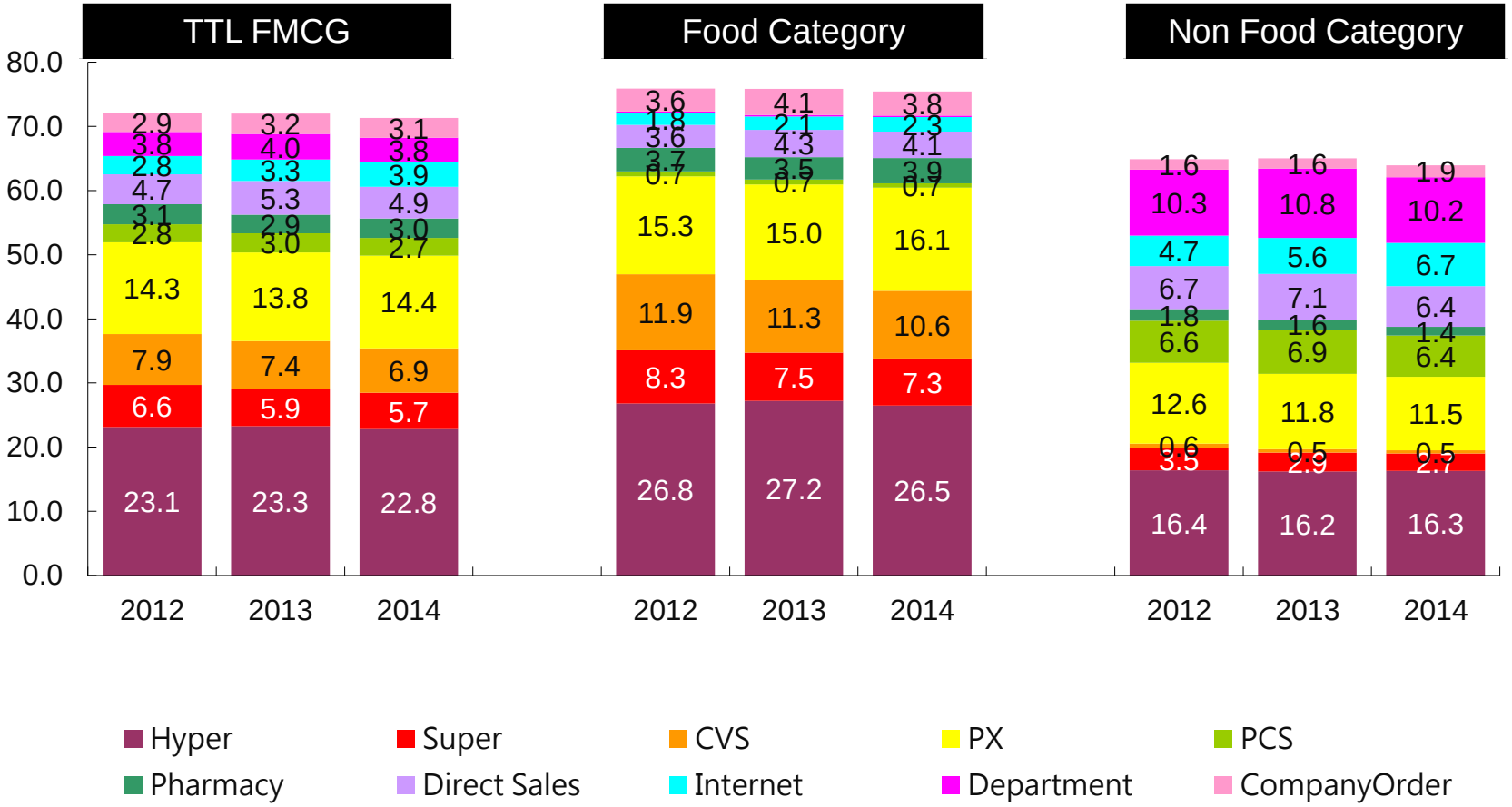
KEY CHANNEL SNAPSHOT – VALUE %

PX Mart shows a great performance on food category and stabilizes its position due to the rapid growth. The rising sales value contributed by Internet in both food and non-food category is also worth noted.



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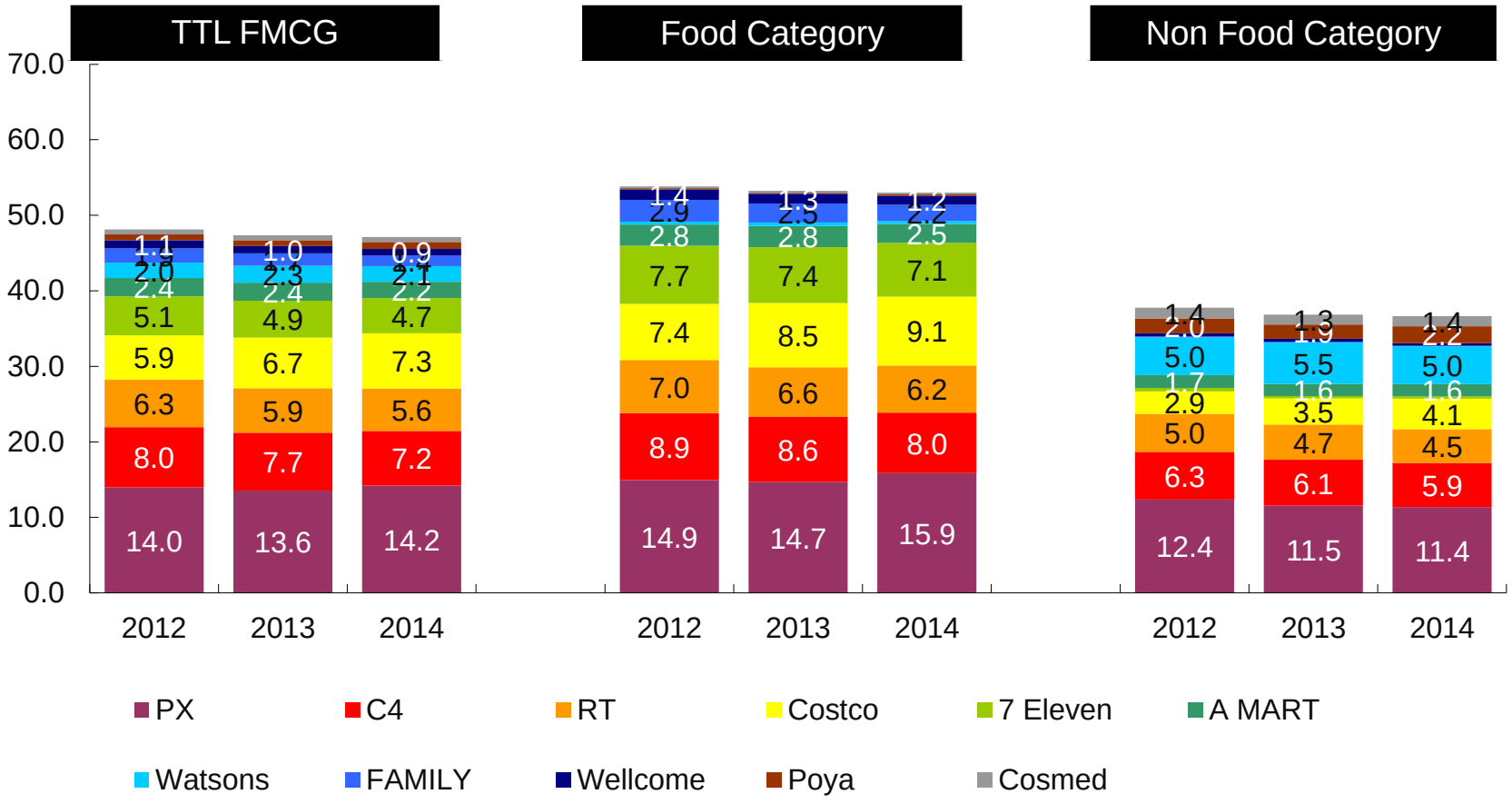
KEY CHANNEL SNAPSHOT – VALUE %

All key channels face critical challenges except for Costco and PX Mart.



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