Taiwan FMCG Monitor

2015 Q1

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2015 Q1 KEY ECONOMICS

+3.4% GDP Growth Rate

+0.96% CPI VSLY March

3.72% Unemployment Rate March

+2% Total FMCG VSLY

- Regardless the gentle growth in economy, low unemployment rate, and stable price index, FMCG market still remains stagnant.
- After food safety scandals, consumers are willing to pay for more expensive and trustable food with better quality, which drives up market sales value. However consumer demand slightly drop, which reflects the conservative shopping attitude. On the other hand, although non food market has better performance than last season, it is still affected by food safety scandals and has low growth rate with less shopping trips.
- PX mart, Costco and online shopping perform well under the stagnant market while CVS and Hypermarket continue to decline.

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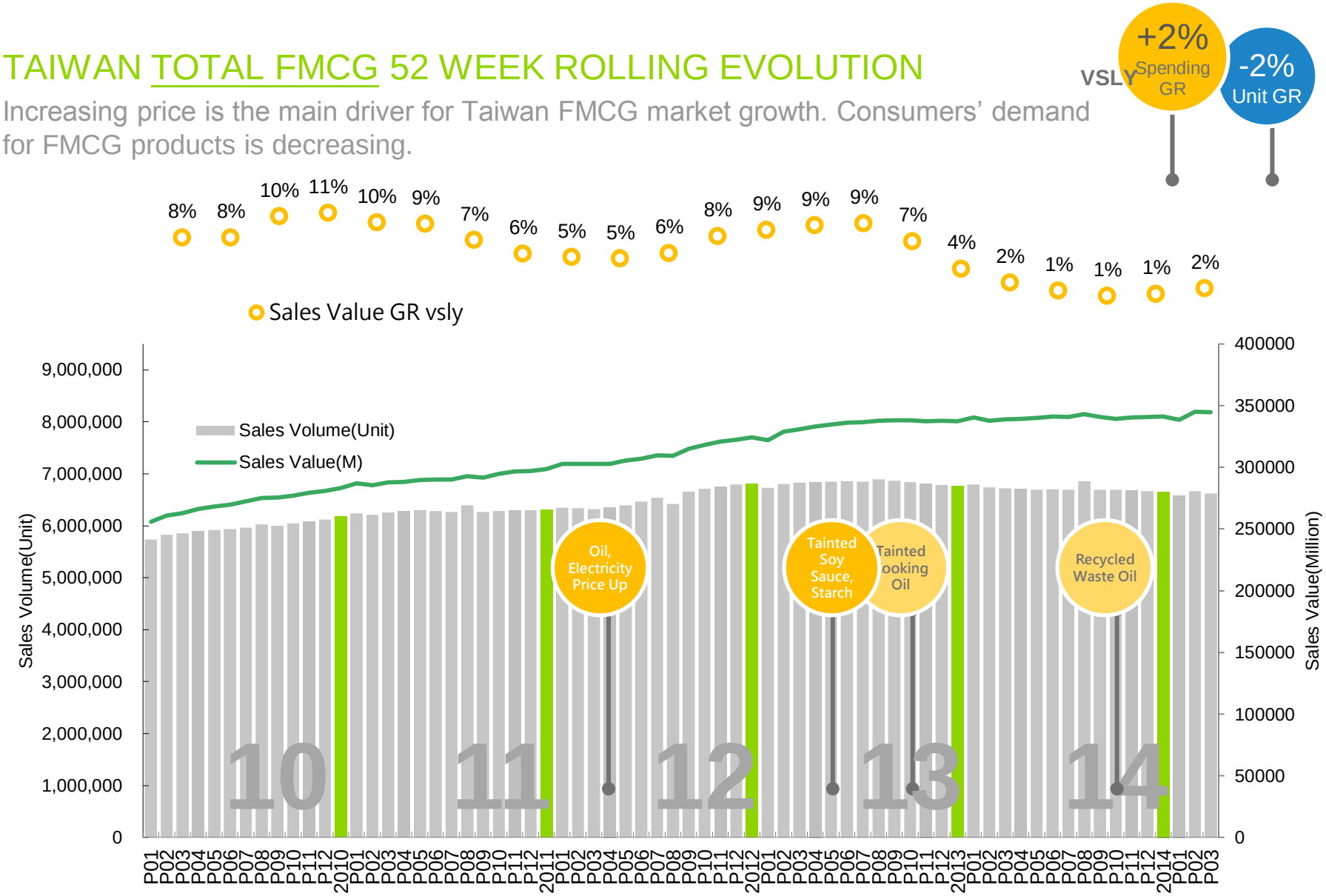
TAIWAN TOTAL FMCG 52 WEEK ROLLING EVOLUTION

Increasing price is the main driver for Taiwan FMCG market growth. Consumers' demand for FMCG products is decreasing.



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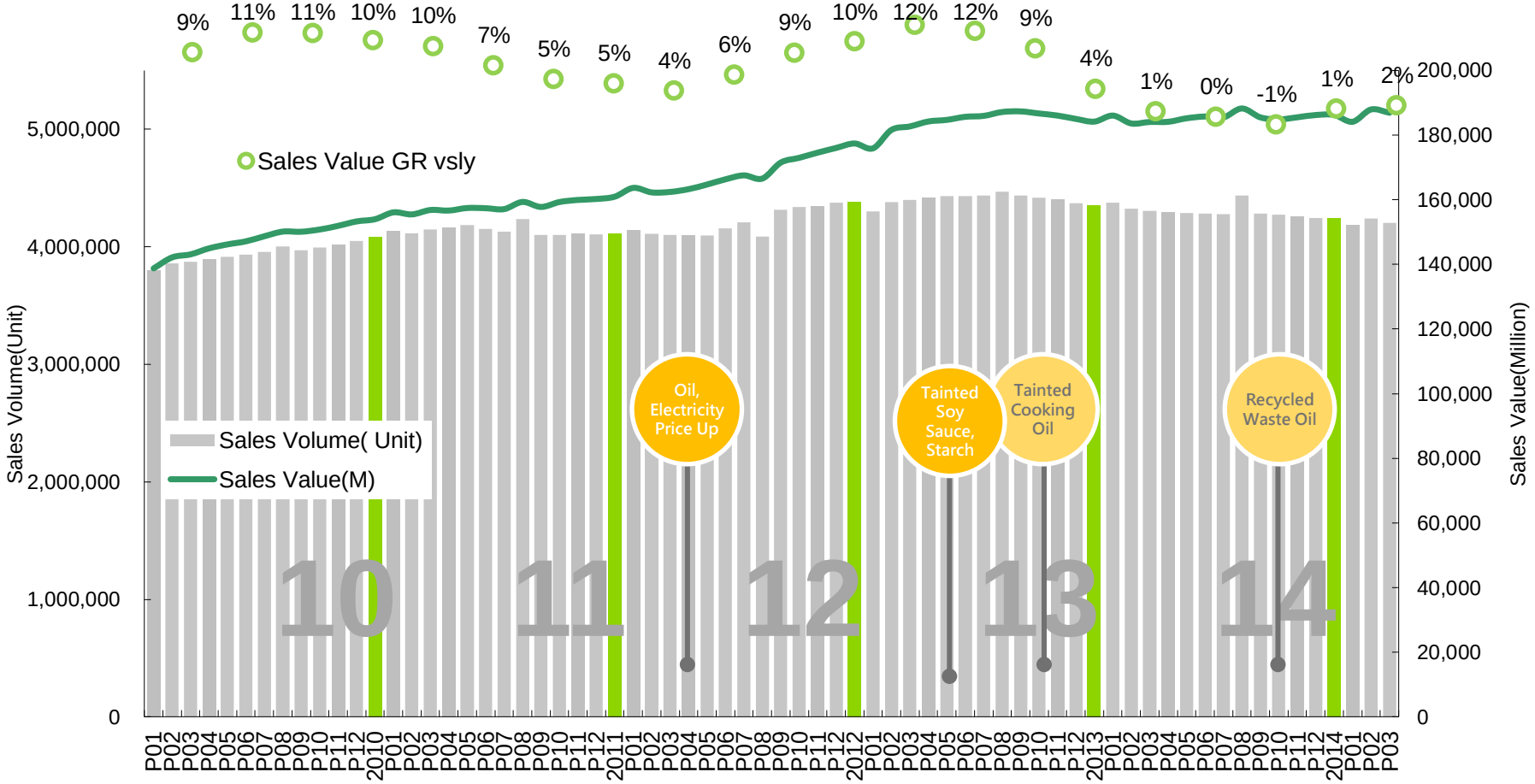
TAIWAN FOOD CATEGORY 52 WEEK ROLLING EVOLUTION

After food safety scandal, consumers are willing to pay for more expensive and trustable food with better quality which drives up market sales value. However consumer demand slightly drop, which reflects the conservative shopping attitude.



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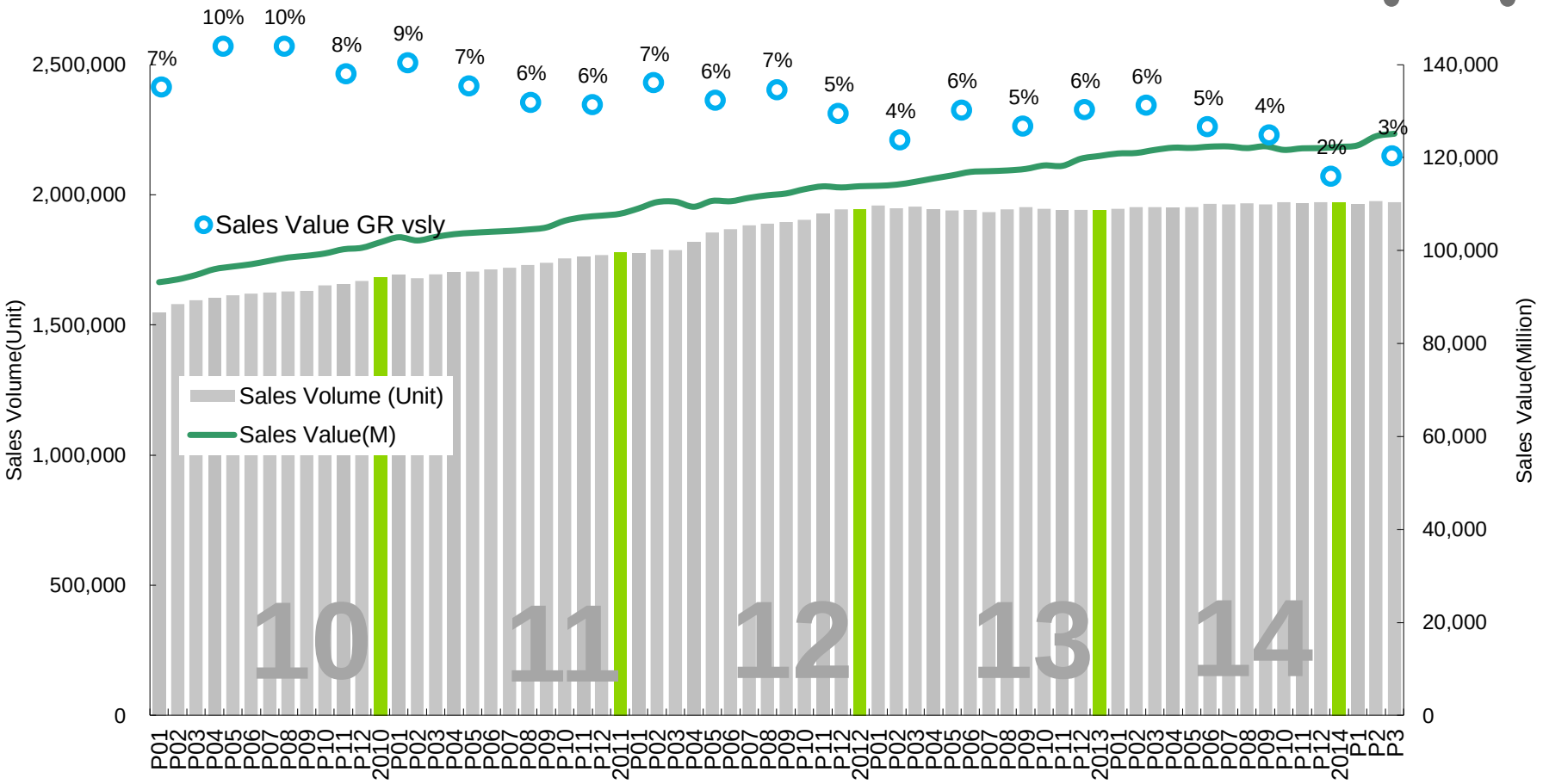
TAIWAN NON-FOOD CATEGORY 52 WEEK ROLLING EVOLUTION

Although non food market has better performance than last season, it is still affected by food safety scandals and has low growth rate with less shopping trips.

VSLY +3% Spending GR +1% Unit GR



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Food Category

Instant Noodle

Frozen Food

Cookie

Packet Noodle

Soy Sauce

Health Supplement

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

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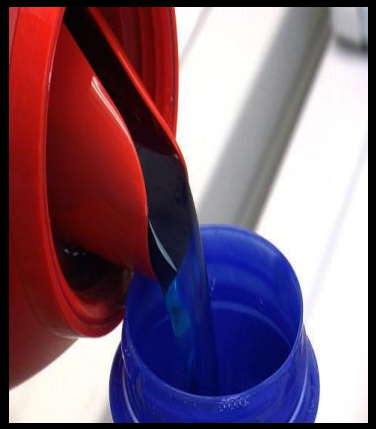
Non Food Category

Detergent



Toothpaste

GR>5%

-0.5%<GR<5%

GR<-0.5%

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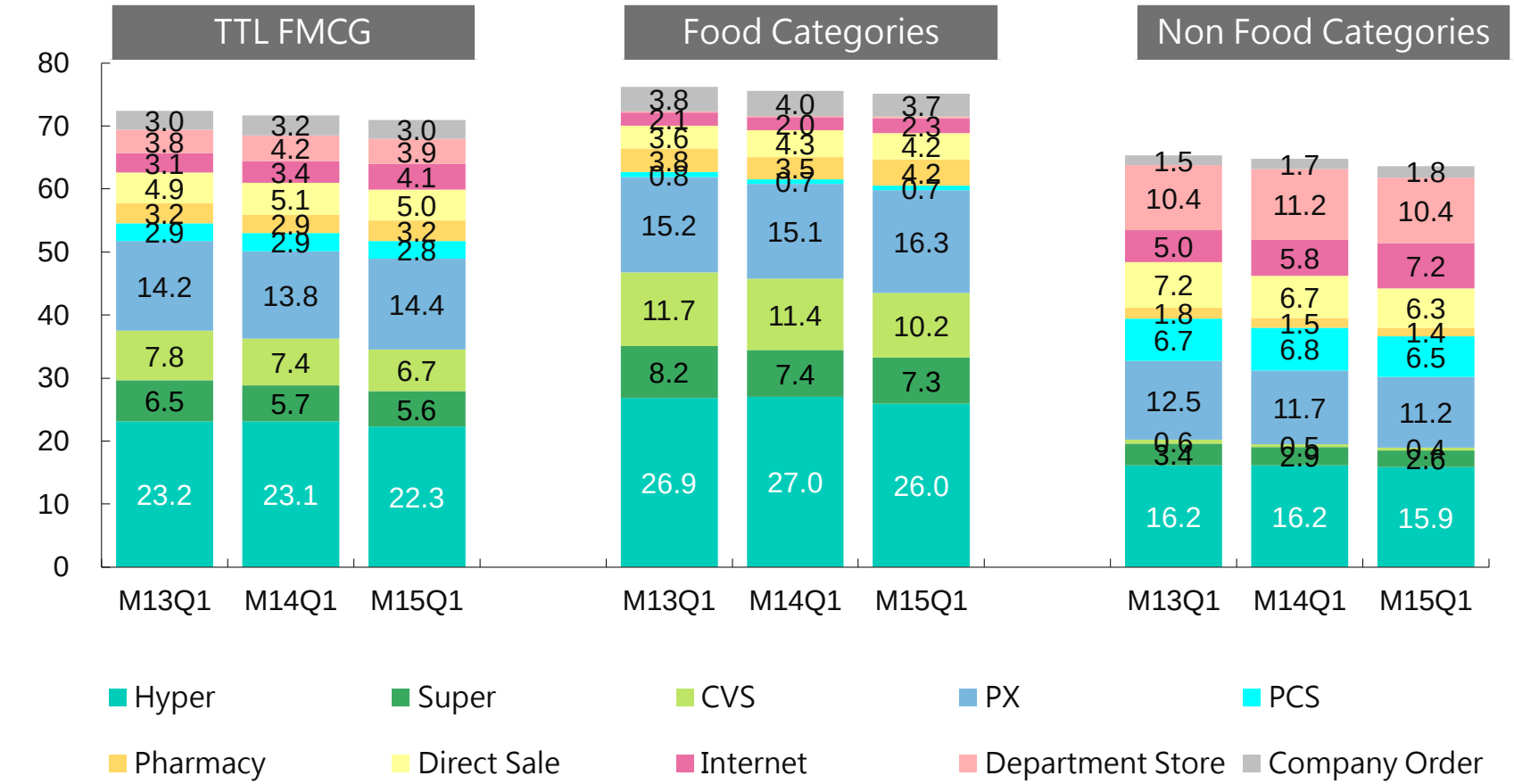
KEY CHANNEL SNAPSHOT – VALUE %

The importance of Hypermarket and CVS are dropping. PX mart performs well in food category, and online shopping grows well in non food category.

52W | Val%



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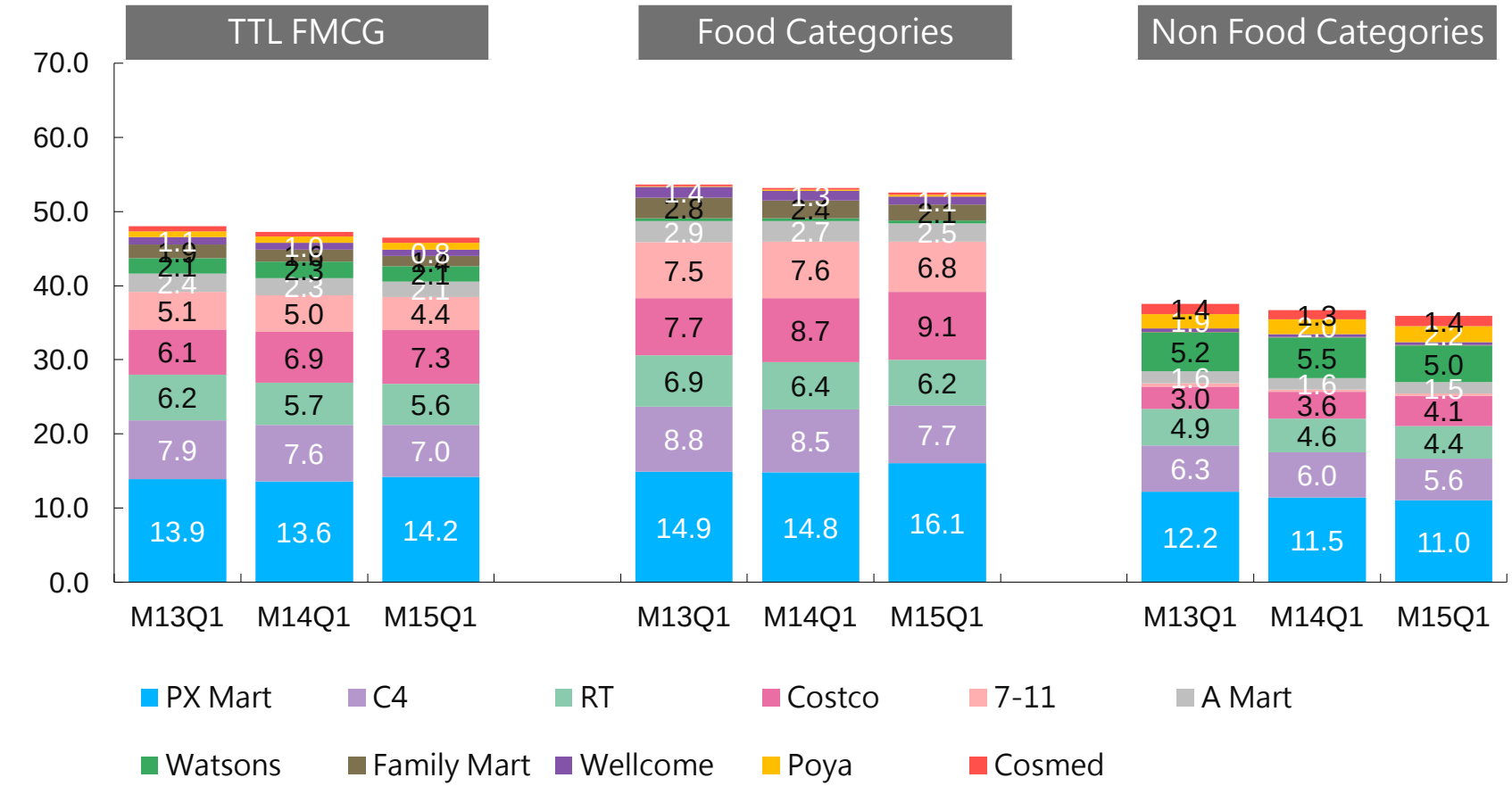
KEY ACCOUNT SNAPSHOT – VALUE %

Carrefour and RT mart showed downward trend. Costco continuous to grow in both food and non food categories. PX mart mainly grow in food categories.

52W | Val%



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