Taiwan FMCG Monitor

2015 Q2

KANTAR WORLDPANEL

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2015 Q2 KEY ECONOMICS

+0.64% GDP Growth Rate

+0.58% CPI VSLY June

3.76% Unemployment Rate June

0% Total FMCG VSLY

- The fact that consumers are pessimistic about the economic growth of Taiwan has caused them to restrain from purchasing both food and non-food products, resulting in a stagnant growth in the overall market.
- Although the demand for packaged food continues to recess, the inclination for purchasing higher quality and premium tier products helps overall food category remain stable. The non-food category has driven growth through its higher tier products in the past, however, the momentum has receded this quarter, causing the growth of the non-food category to halt.
- While PX performs exceptionally well in the food category, and Online Shopping also shows promising growth in the non-food category, Hyper, Super, and CVS, on the contrary, have shown a trend of decline, especially in the food category.

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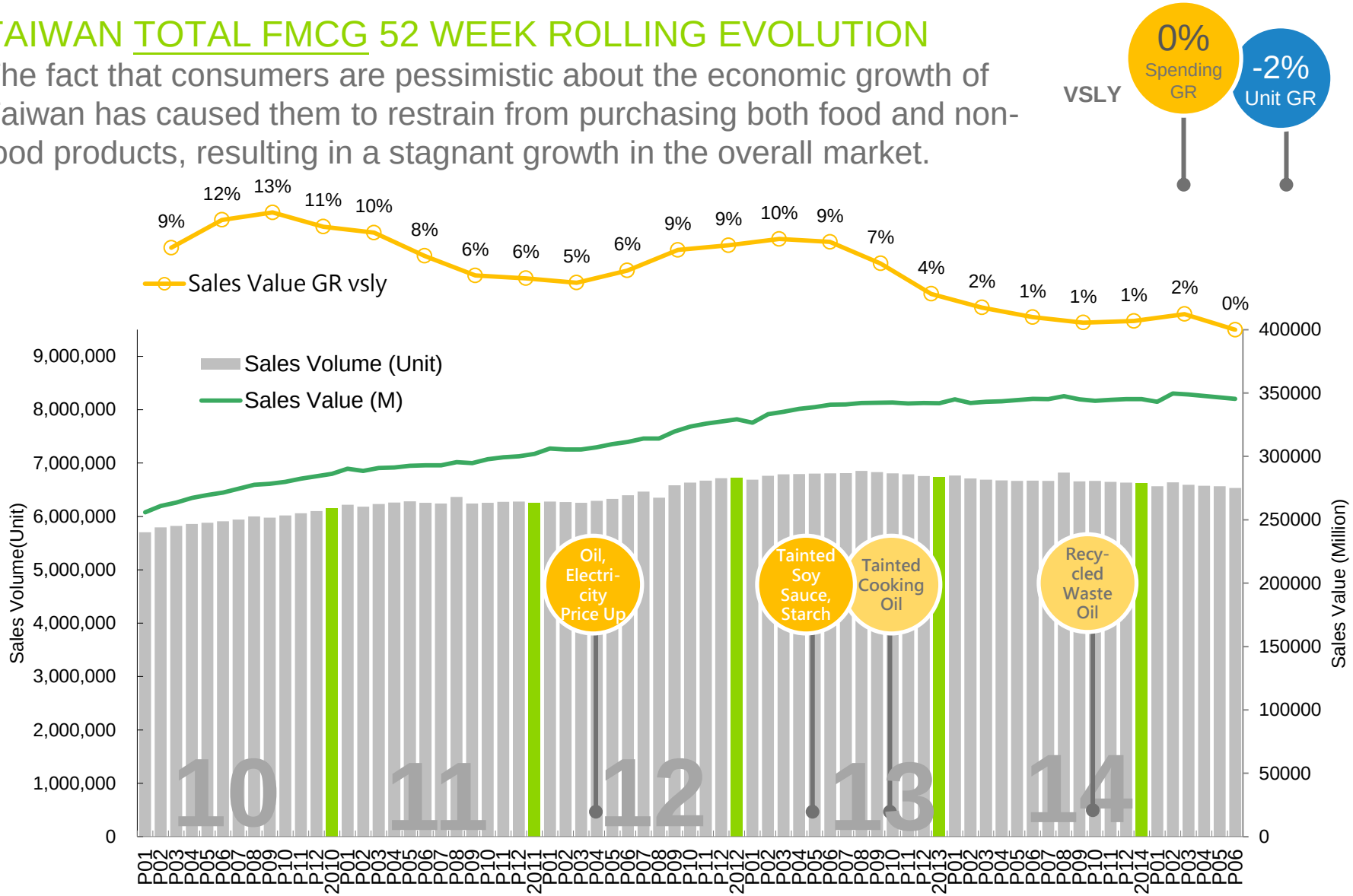
TAIWAN TOTAL FMCG 52 WEEK ROLLING EVOLUTION

The fact that consumers are pessimistic about the economic growth of Taiwan has caused them to restrain from purchasing both food and non-food products, resulting in a stagnant growth in the overall market.



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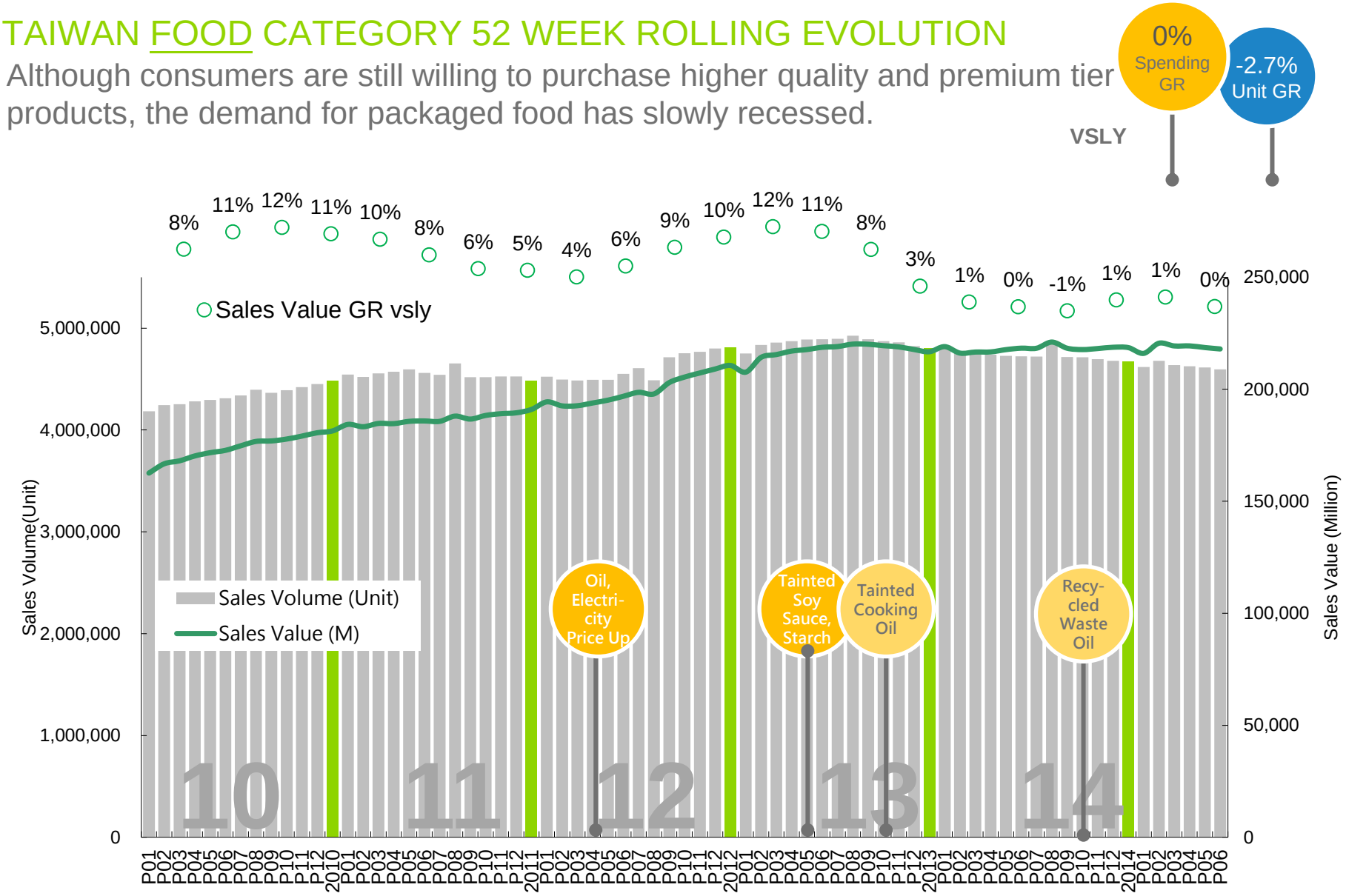
TAIWAN FOOD CATEGORY 52 WEEK ROLLING EVOLUTION

Although consumers are still willing to purchase higher quality and premium tier products, the demand for packaged food has slowly recessed.



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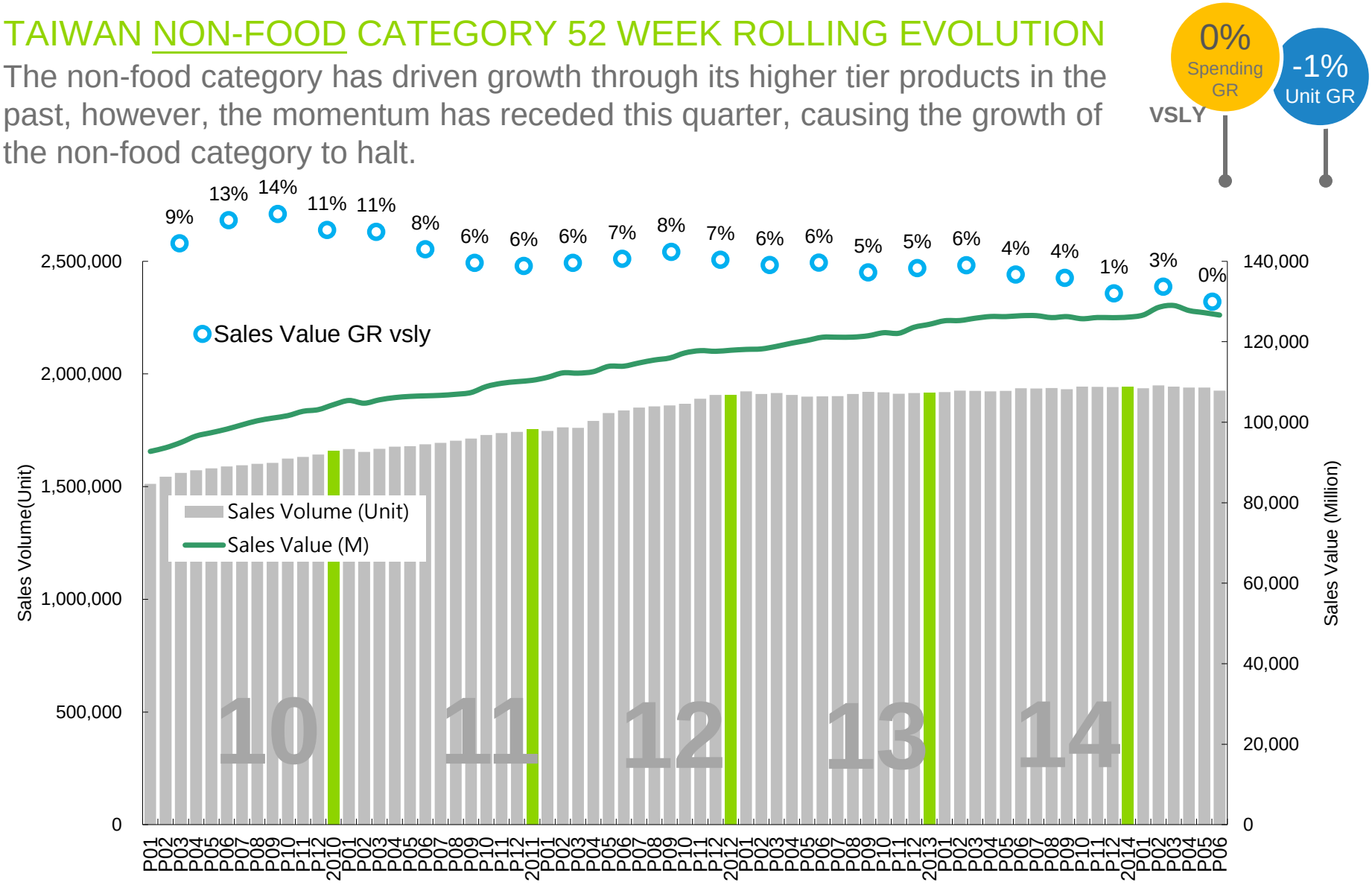
TAIWAN NON-FOOD CATEGORY 52 WEEK ROLLING EVOLUTION

The non-food category has driven growth through its higher tier products in the past, however, the momentum has receded this quarter, causing the growth of the non-food category to halt.



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Food Category

Instant Noodle

Frozen Food

Cookie

Packet Noodle

Soy Sauce

Health Supplement

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

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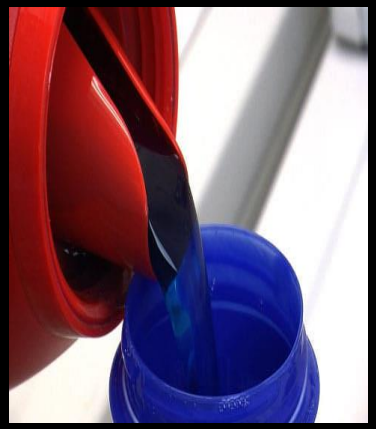
Non Food Category

Detergent



Toothpaste

Skincare

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

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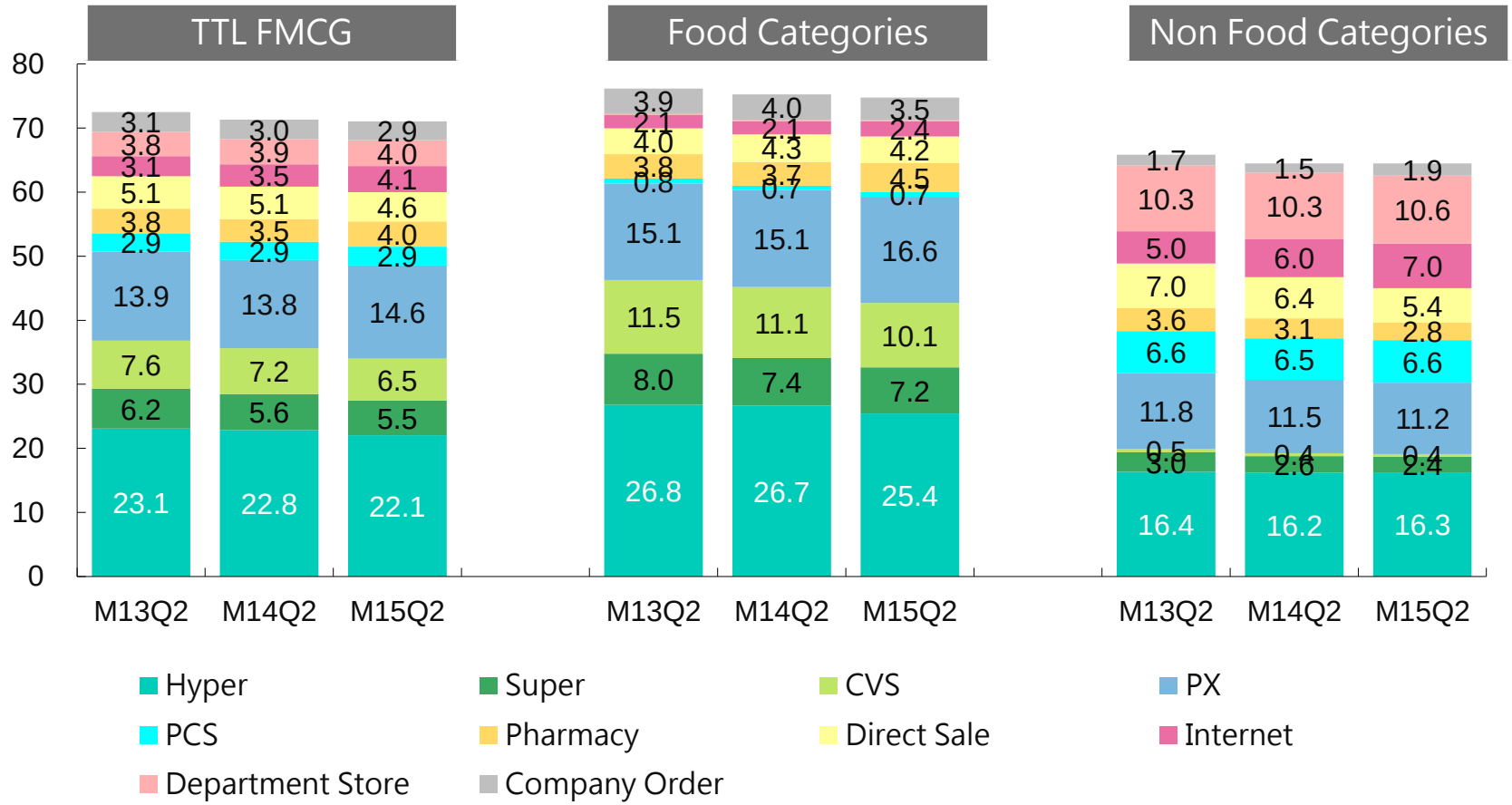
KEY CHANNEL SNAPSHOT – VALUE %

On one hand, PX performs exceptionally well in the food categories, and Online Shopping also shows promising growth in the non-food category, Hyper, Super, and CVS, on the contrary, have shown a trend of decline, especially in the food categories.

52W | Val%



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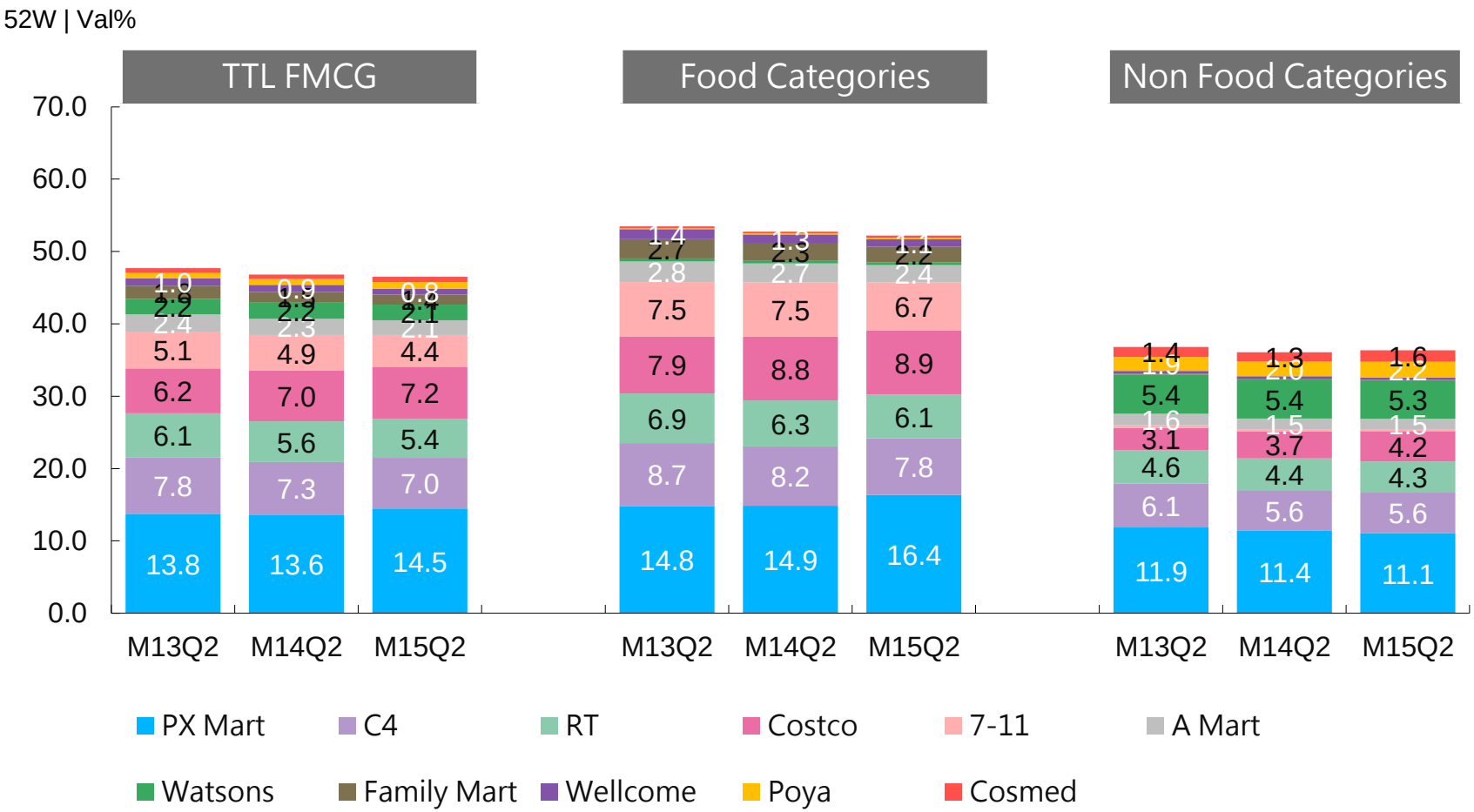
KEY ACCOUNT SNAPSHOT – VALUE %

7-11 mainly declines in the food category, and Family Mart perform relatively stable. Besides, there is a critical trend of descent in the importance of C4 and RT.



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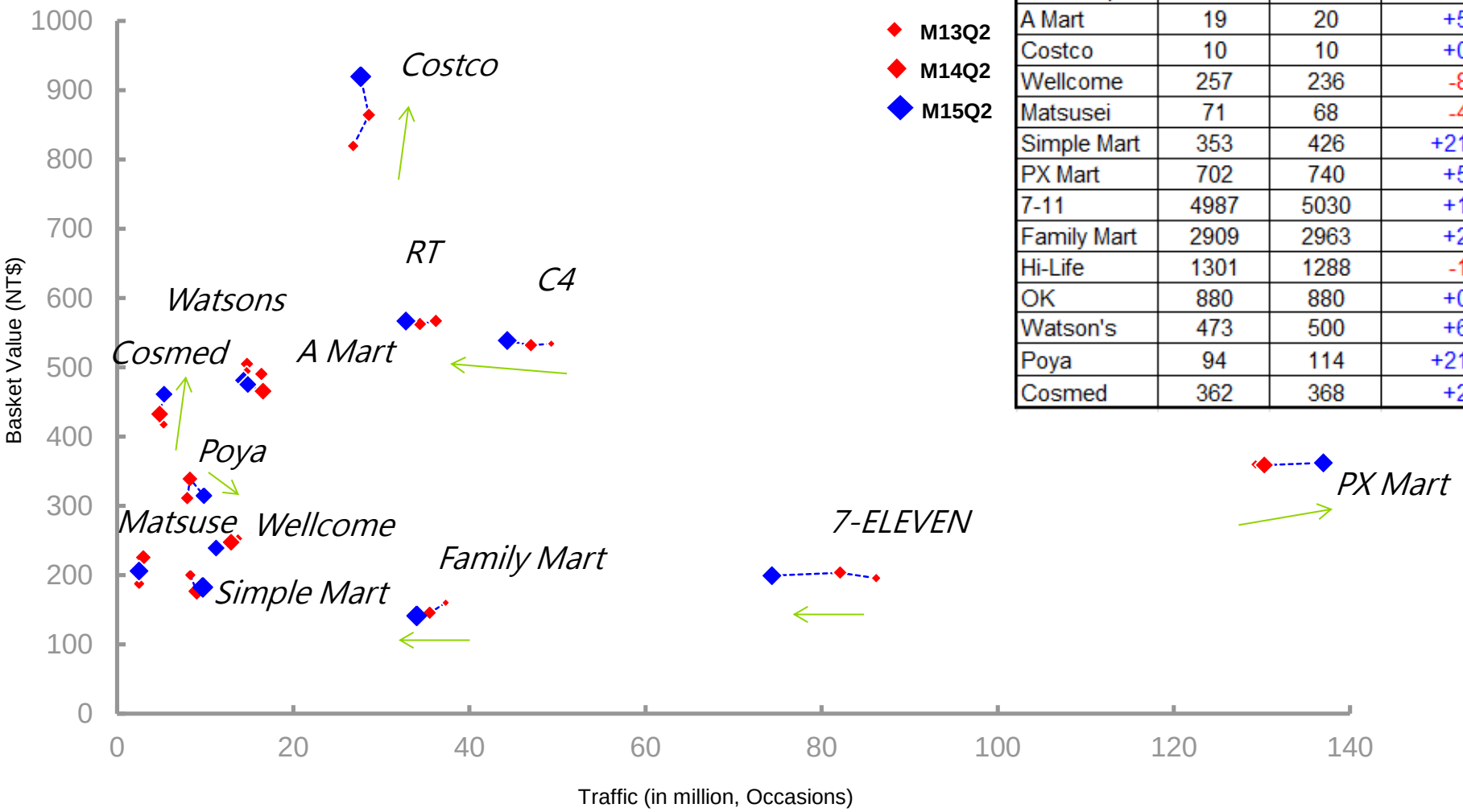
RETAILER HEALTH – TRAFFIC vs. BASKET VALUE



Store	14Q2	15Q2	GR%
Carrefour	62	63	+2%
RT Group	26	26	+0%
A Mart	19	20	+5%
Costco	10	10	+0%
Wellcome	257	236	-8%
Matsusei	71	68	-4%
Simple Mart	353	426	+21%
PX Mart	702	740	+5%
7-11	4987	5030	+1%
Family Mart	2909	2963	+2%
Hi-Life	1301	1288	-1%
OK	880	880	+0%
Watson's	473	500	+6%
Poya	94	114	+21%
Cosmed	362	368	+2%

Source: Kantar Worldpanel Taiwan Household Panel

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