Taiwan FMCG Monitor

2015 Q3

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2015 Q3 KEY ECONOMICS

-1.01% GDP Growth Rate VSLY Q3

+0.79% CPI September 2015 YTD Growth Rate*

*exclude fruit, vegetable and energy

3.76% Unemployment Rate September 2015 YTD

1% Total FMCG VSLY

- The overall FMCG market has stabilized (+1%), and it is mainly due to the recovery from the non-food category in Q3 (+2%).
- Taiwan catering industry continuous to grow and it is very convenient to buy ready-to-eat food in CVS, thus, the demand of consumers towards packaged food has dropped. However, since consumers are prone to buying higher quality and more premium tier products, the sales value remained steady in the food market. On the contrary, both sales volume and value have started to rebound back in the non-food market, especially with personal care products and tissue paper.
- Channel-wise, PX has exceptional performance in food category, and there is also continuous growth in Online-shopping. The importance of Hypermarkets, Super, and CVS still shows a trend of decline, mainly in the food Category.

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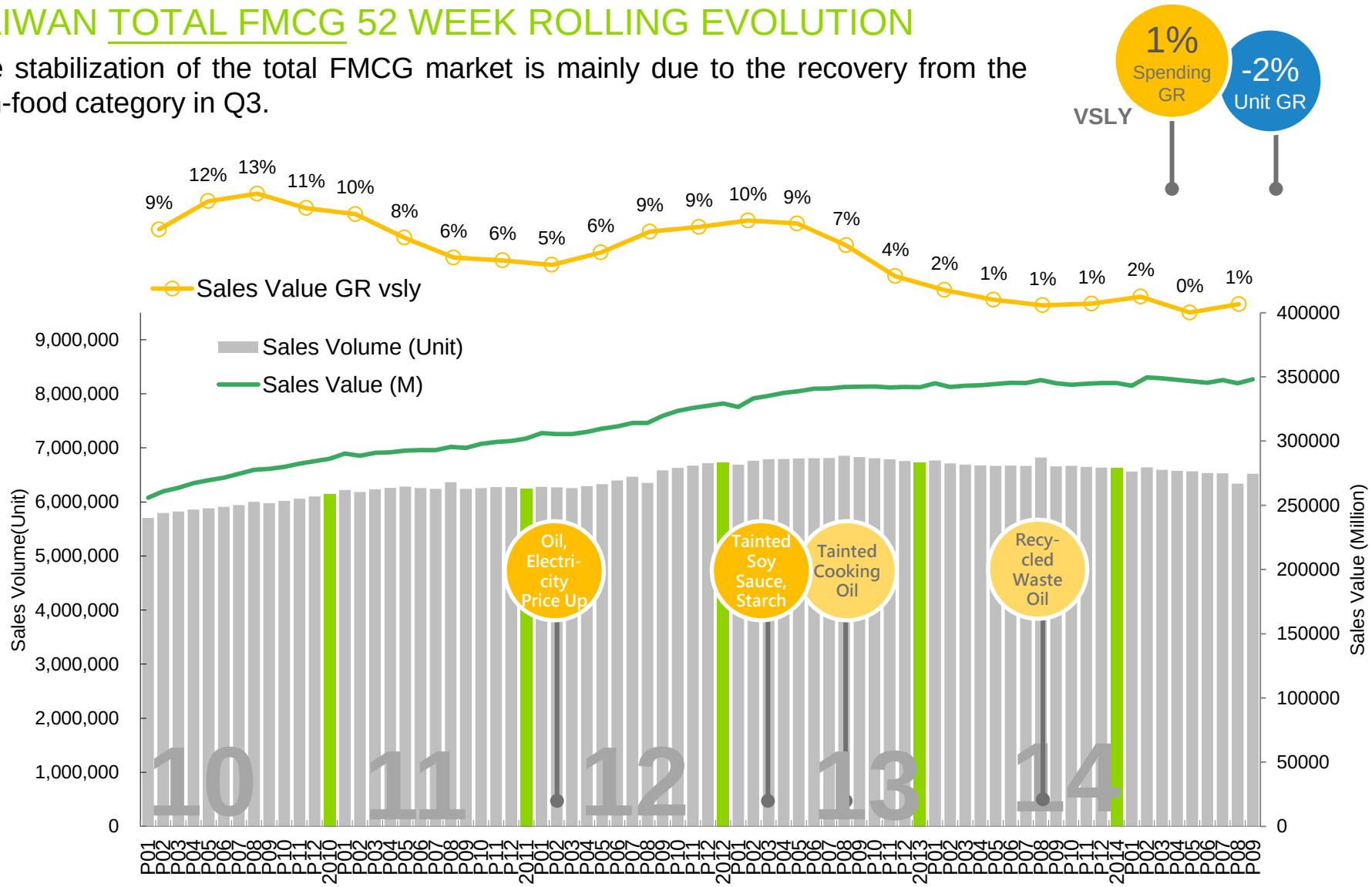
TAIWAN TOTAL FMCG 52 WEEK ROLLING EVOLUTION

The stabilization of the total FMCG market is mainly due to the recovery from the non-food category in Q3.



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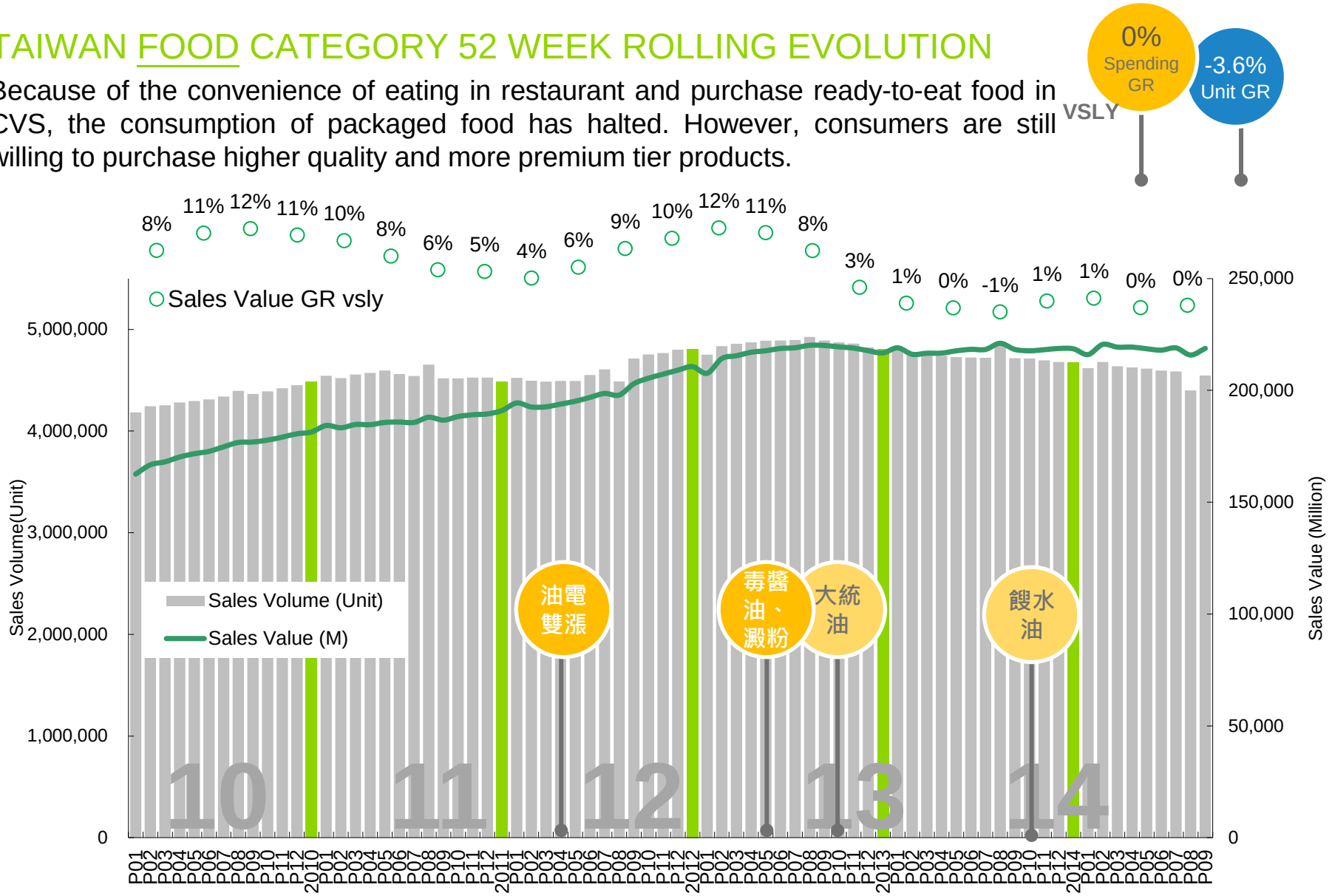
TAIWAN FOOD CATEGORY 52 WEEK ROLLING EVOLUTION

Because of the convenience of eating in restaurant and purchase ready-to-eat food in CVS, the consumption of packaged food has halted. However, consumers are still willing to purchase higher quality and more premium tier products.



Data Resource: Kantar Worldpanel Taiwan Home

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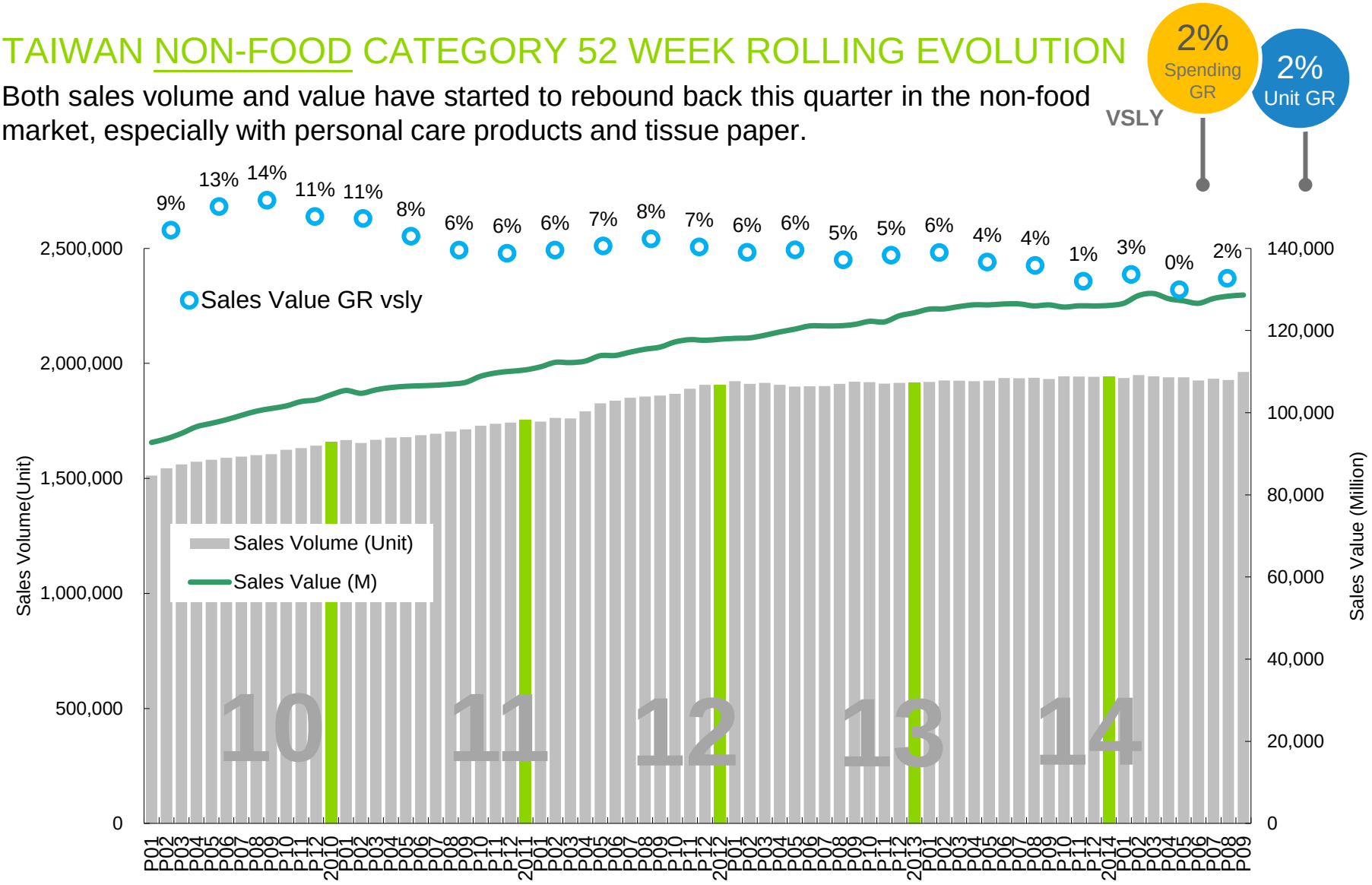
TAIWAN NON-FOOD CATEGORY 52 WEEK ROLLING EVOLUTION

Both sales volume and value have started to rebound back this quarter in the non-food market, especially with personal care products and tissue paper.



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Food Category

Soy Sauce, Seasoning

Instant Noodle, Frozen Food

Ground Coffee

Health Supplement

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

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Non Food Category

Tissue、Kitchen Towel、Wet Tissue

Shampoo, Treatment

Skincare

GR>5%

-0.5%<GR<5%

GR<-0.5%

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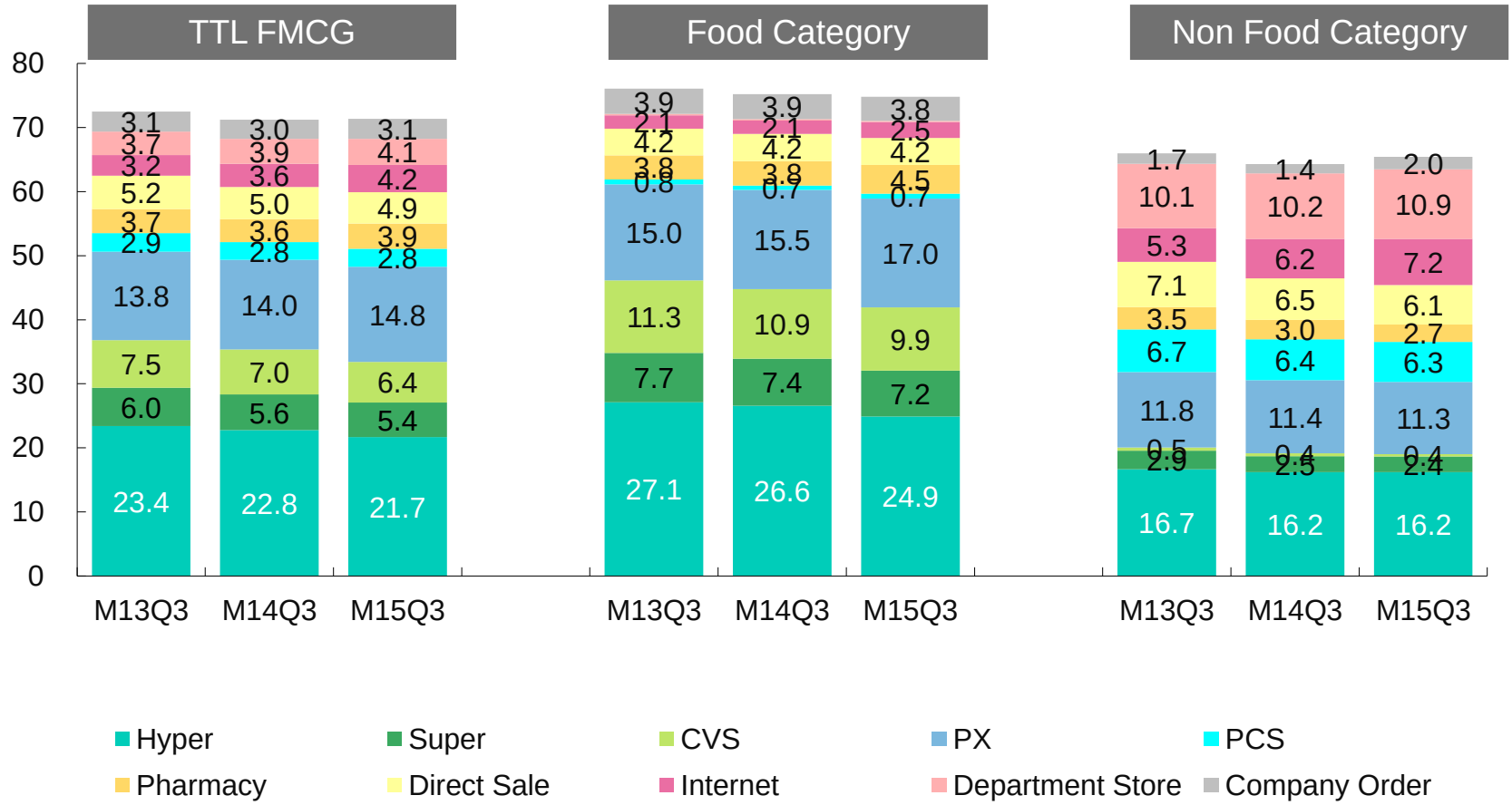
KEY CHANNEL SNAPSHOT – VALUE %

The performance of PX in food category is outstanding, enabling its importance to grow rapidly in food market. While Online-shopping is emerging, too, the importance of Hypermarkets, Super, and CVS has declined, particularly in food category.

52W | Val%



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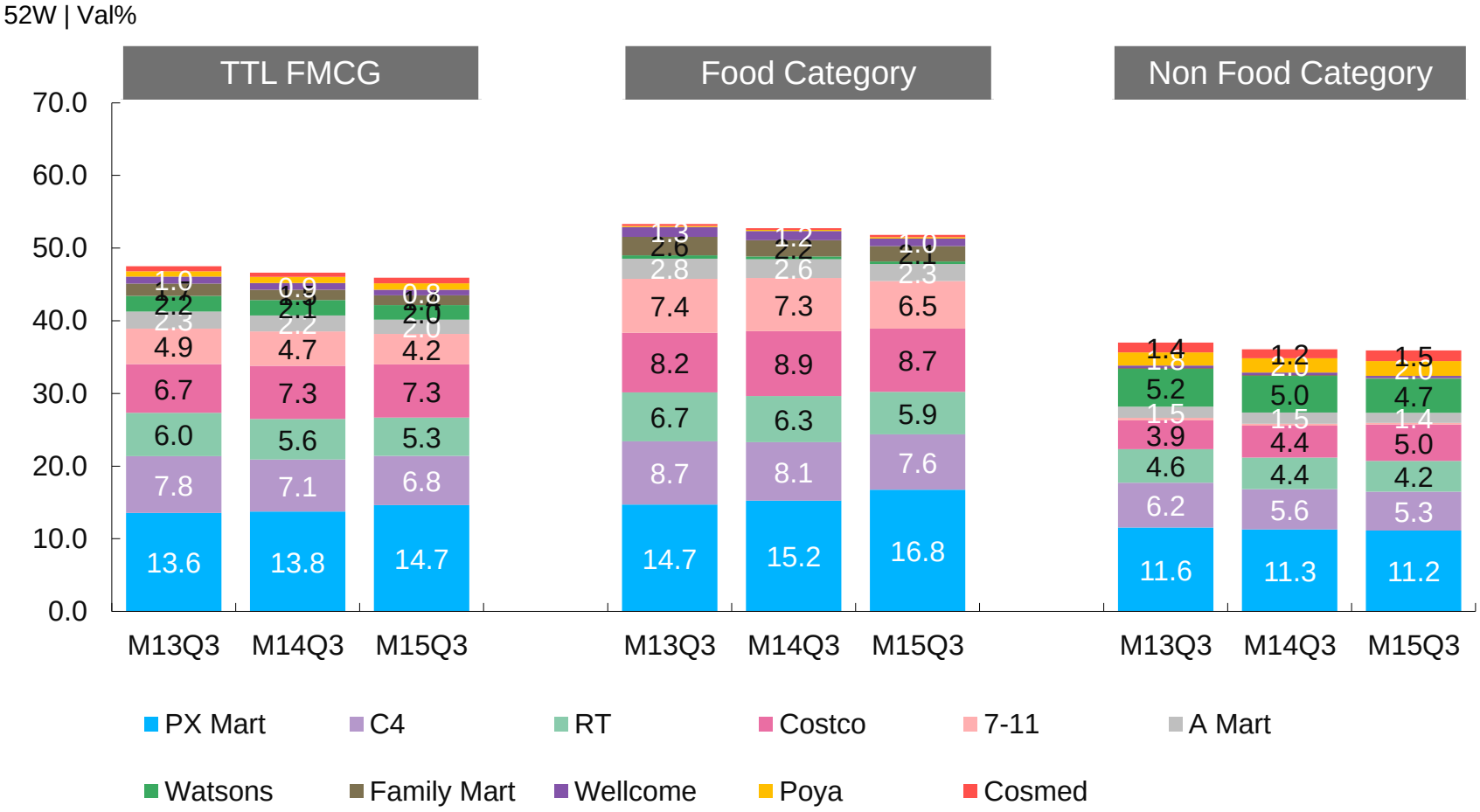
KEY CHANNEL SNAPSHOT – VALUE %

The growth of Costco has ceased, mainly because of its underperformance in the food category, but the growth of its non-food category is ascending quickly. The importance of Carrefour, RT-mart, and 7-11 is still dropping.



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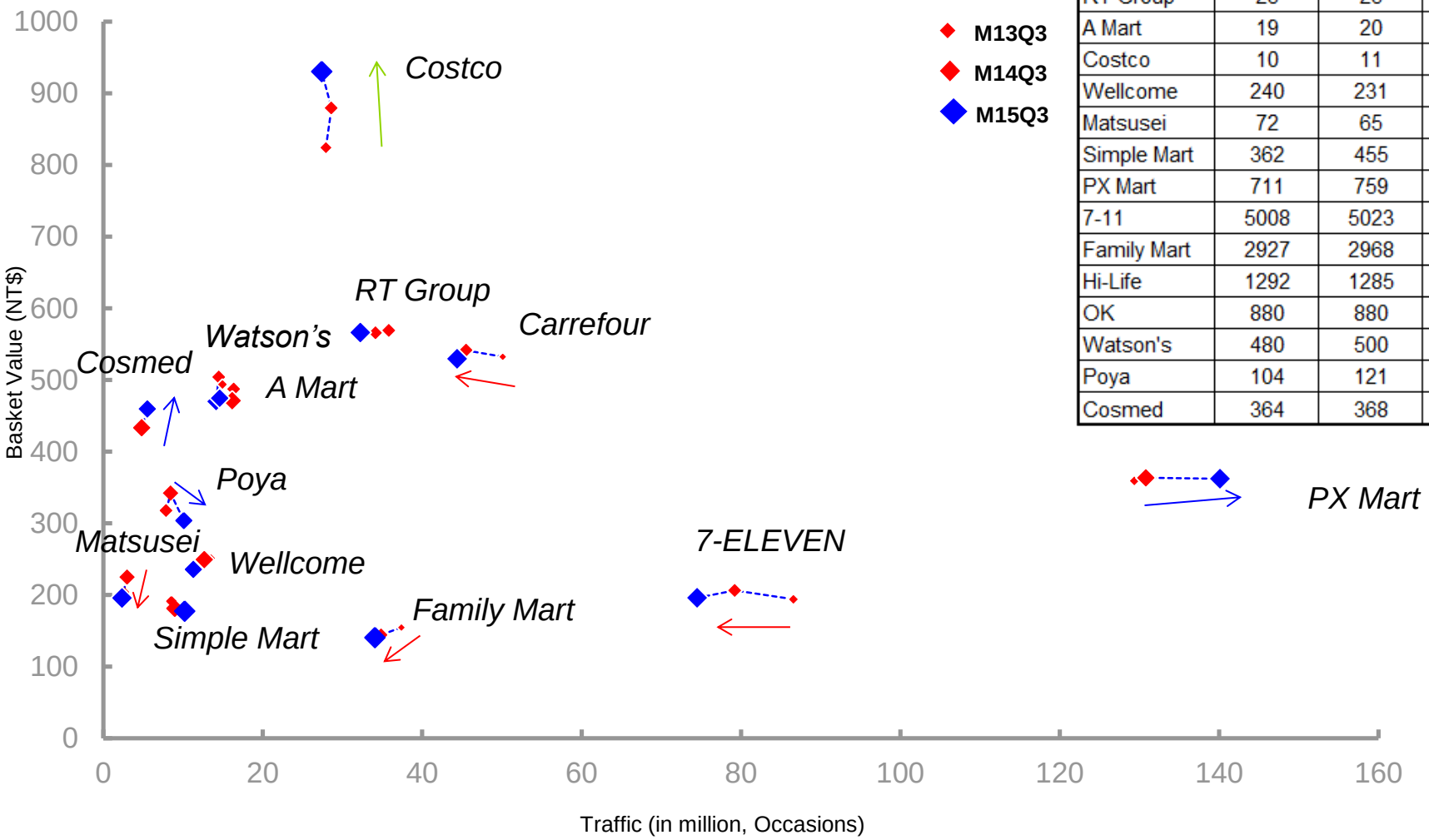
RETAILER HEALTH – TRAFFIC vs. BASKET VALUE



Store	14Q3	15Q3	GR%
Carrefour	61	63	+3%
RT Group	26	26	+0%
A Mart	19	20	+5%
Costco	10	11	+10%
Wellcome	240	231	-4%
Matsusei	72	65	-10%
Simple Mart	362	455	+26%
PX Mart	711	759	+7%
7-11	5008	5023	+0%
Family Mart	2927	2968	+1%
Hi-Life	1292	1285	-1%
OK	880	880	+0%
Watson's	480	500	+4%
Poya	104	121	+16%
Cosmed	364	368	+1%

Source: Kantar Worldpanel Taiwan Household Panel

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