Taiwan FMCG Monitor

2015 Q4

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2015 Q4 KEY ECONOMICS

+0.75% GDP Growth Rate 2015

-0.31% CPI Growth Rate 2015

3.78% Unemployment Rate 2015

2% Total FMCG VSLY

- The overall FMCG market has increased 2% in sales value in 2015 Q4, and gradually recovers from the impact of food safety crisis in 2014.
- After food safety crisis ,consumers are more cautious about their health and lead to the growth of related categories. Besides, the growth of catering industry implicate the change in lifestyle and decreasing demand for condiment and cooking oil. In long terms, food with higher quality and premium tier products are the main drives to the market. Non-food category maintain steady growth, and personal care products perform relatively well.
- Channel-wise, hypermarket shows decline trend in food category, while PX performs well in food category. Online-shopping and department store(shopping mall) also grow in personal care products.

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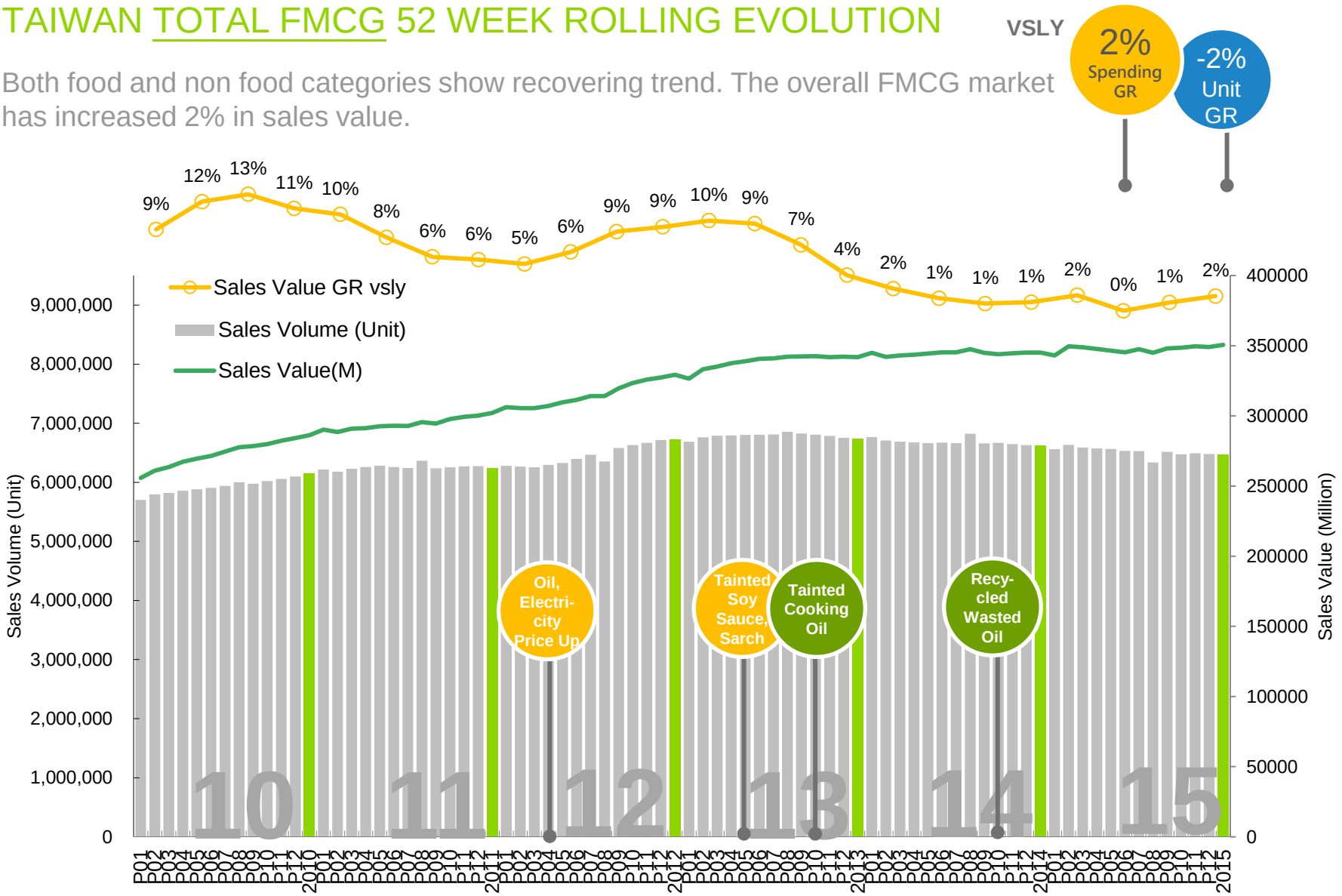
TAIWAN TOTAL FMCG 52 WEEK ROLLING EVOLUTION

Both food and non food categories show recovering trend. The overall FMCG market has increased 2% in sales value.



Source: Kantar Worldpanel Taiwan Household Panel

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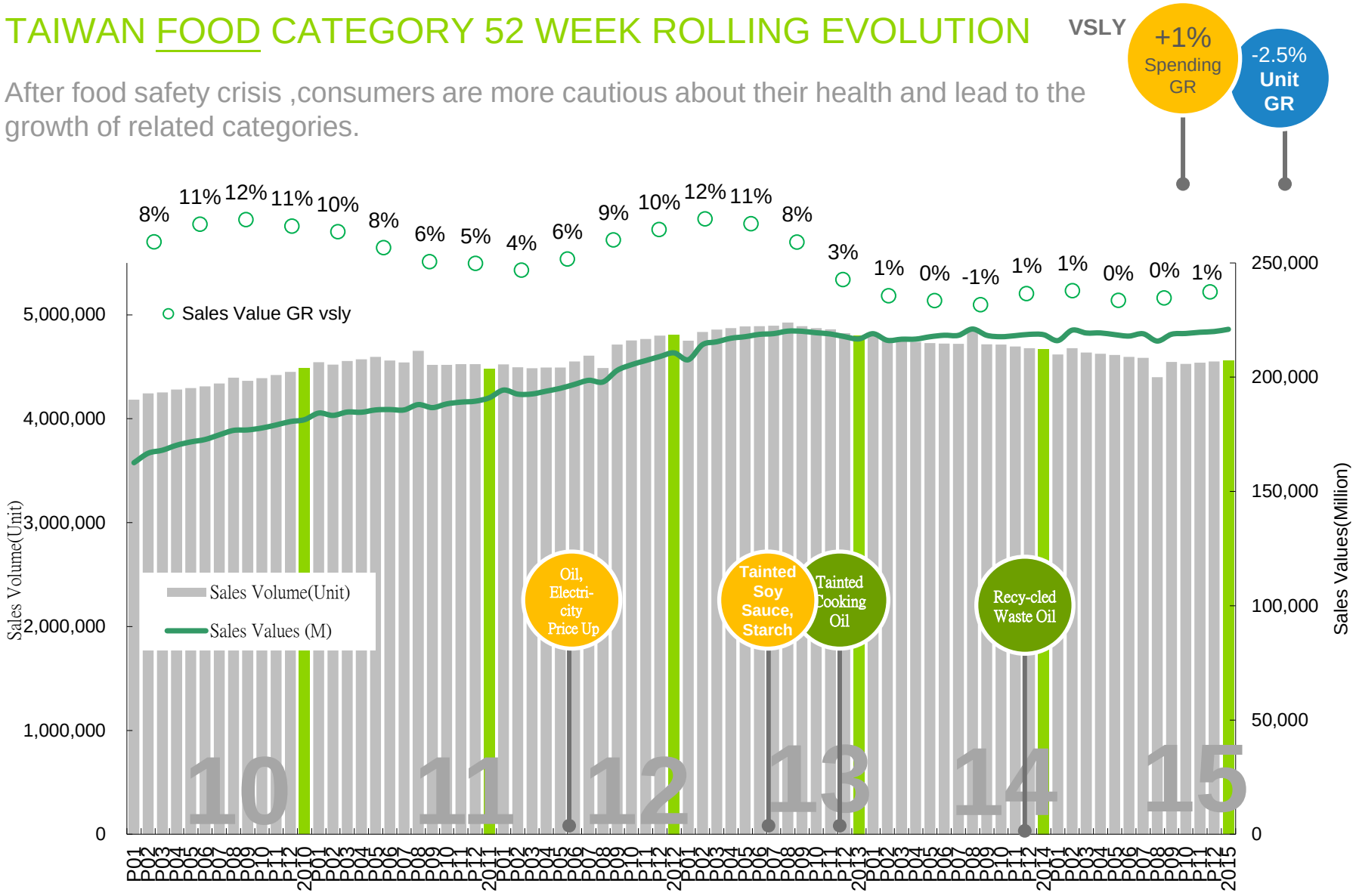
TAIWAN FOOD CATEGORY 52 WEEK ROLLING EVOLUTION

After food safety crisis ,consumers are more cautious about their health and lead to the growth of related categories.



Source: Kantar Worldpanel Taiwan Household Panel

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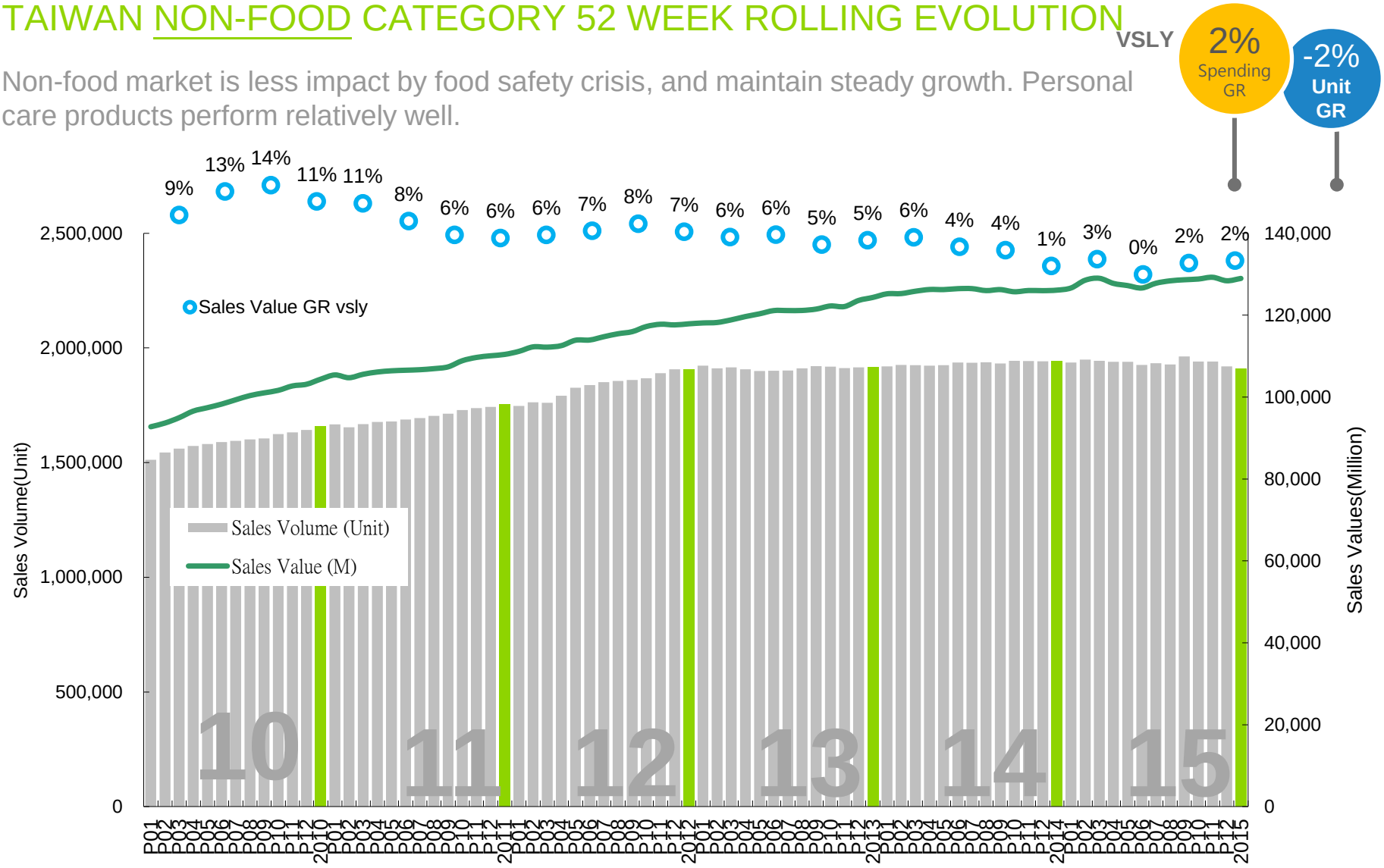
TAIWAN NON-FOOD CATEGORY 52 WEEK ROLLING EVOLUTION

Non-food market is less impact by food safety crisis, and maintain steady growth. Personal care products perform relatively well.



Source: Kantar Worldpanel Taiwan Household Panel

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Food Category

Soy Sauce, Cooking Oil

Health Supplement

Soy Milk

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

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Non-Food Category

Tissue

Shampoo, Hair Colorant

Cosmetics

Soap

GR>5%

-0.5%<GR<5%

GR<-0.5%

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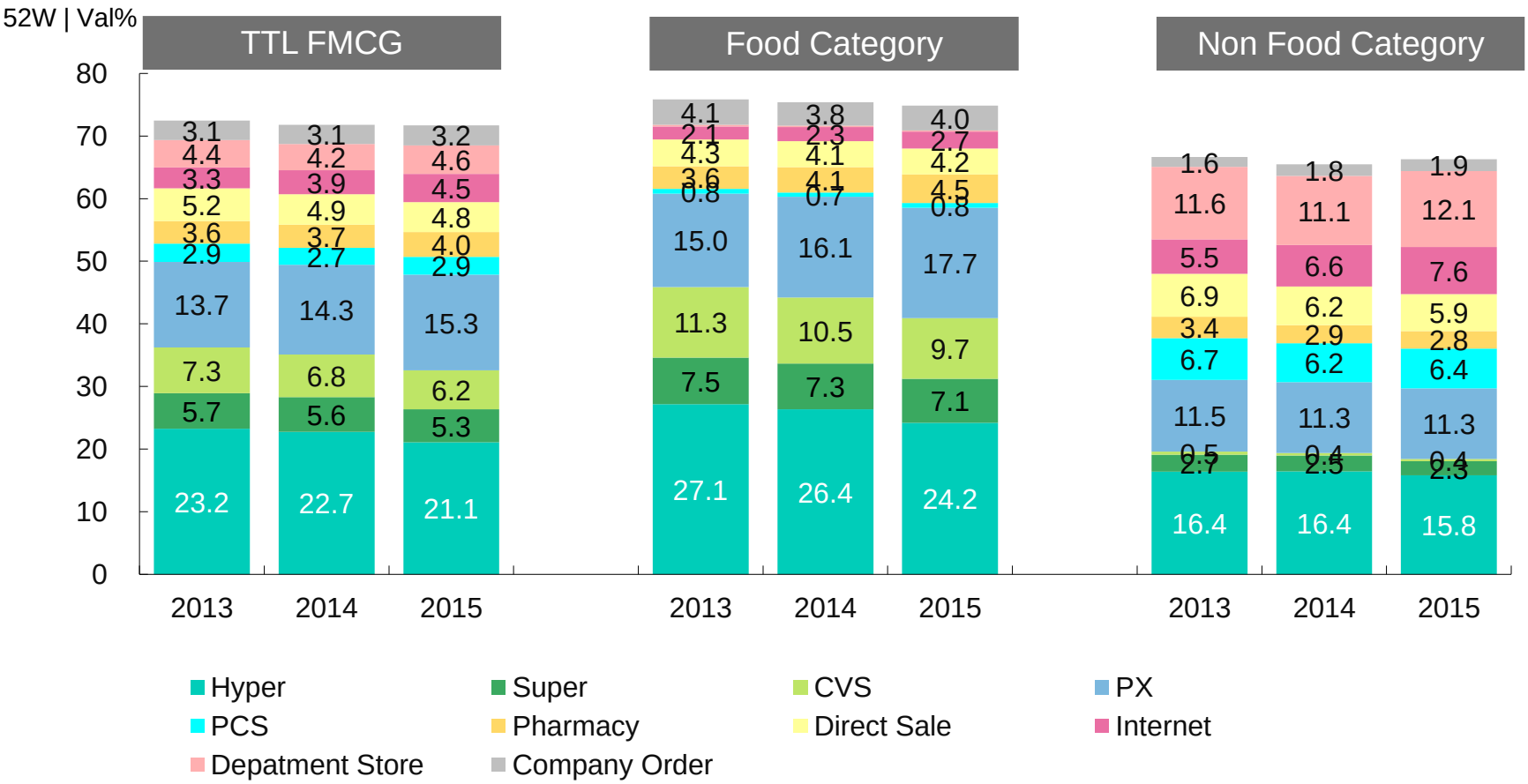
KEY CHANNEL SNAPSHOT – VALUE %

Hypermarkets has shown decline trend, particularly in frozen food and fresh milk categories, because of the impact of food safety crisis. PX performs well in fresh milk product and enables its share in total FMCG exceed 15 %.



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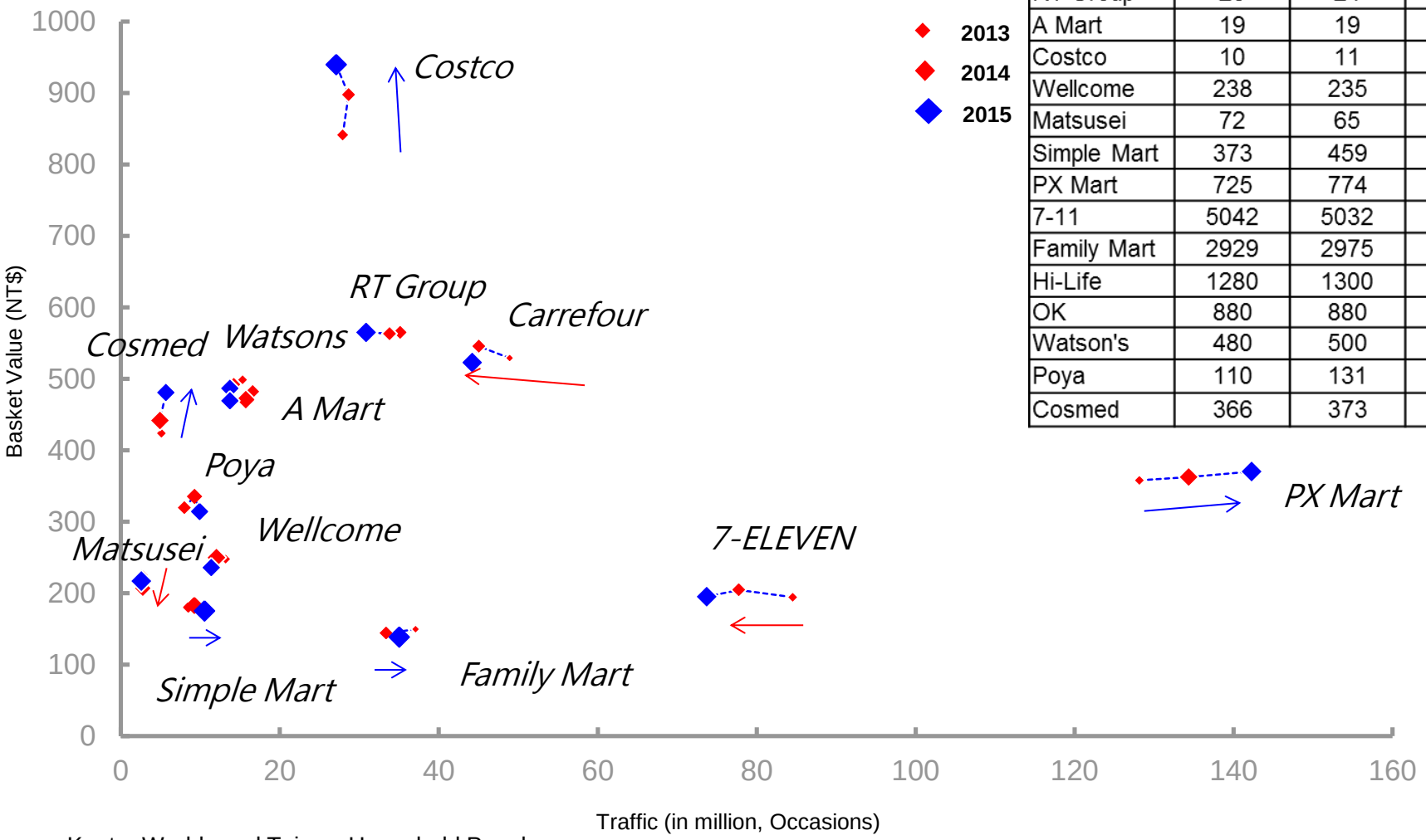
RETAILER HEALTH – TRAFFIC vs. BASKET VALUE



Store	14Q4	15Q4	GR%
Carrefour	61	64	+5%
RT Group	26	24	-8%
A Mart	19	19	+0%
Costco	10	11	+10%
Wellcome	238	235	-1%
Matsusei	72	65	-10%
Simple Mart	373	459	+23%
PX Mart	725	774	+7%
7-11	5042	5032	0%
Family Mart	2929	2975	+2%
Hi-Life	1280	1300	+1.56%
OK	880	880	0%
Watson's	480	500	+4%
Poya	110	131	+19%
Cosmed	366	373	+2%

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