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WELCOME

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AGENDA

- Who we are and what we do
- It’s been tough the FMCG growth
- Asian Brand Power
  - Their stories
  - Your check list
- The challenges of path to purchase today and our advice

Q&A

WPP

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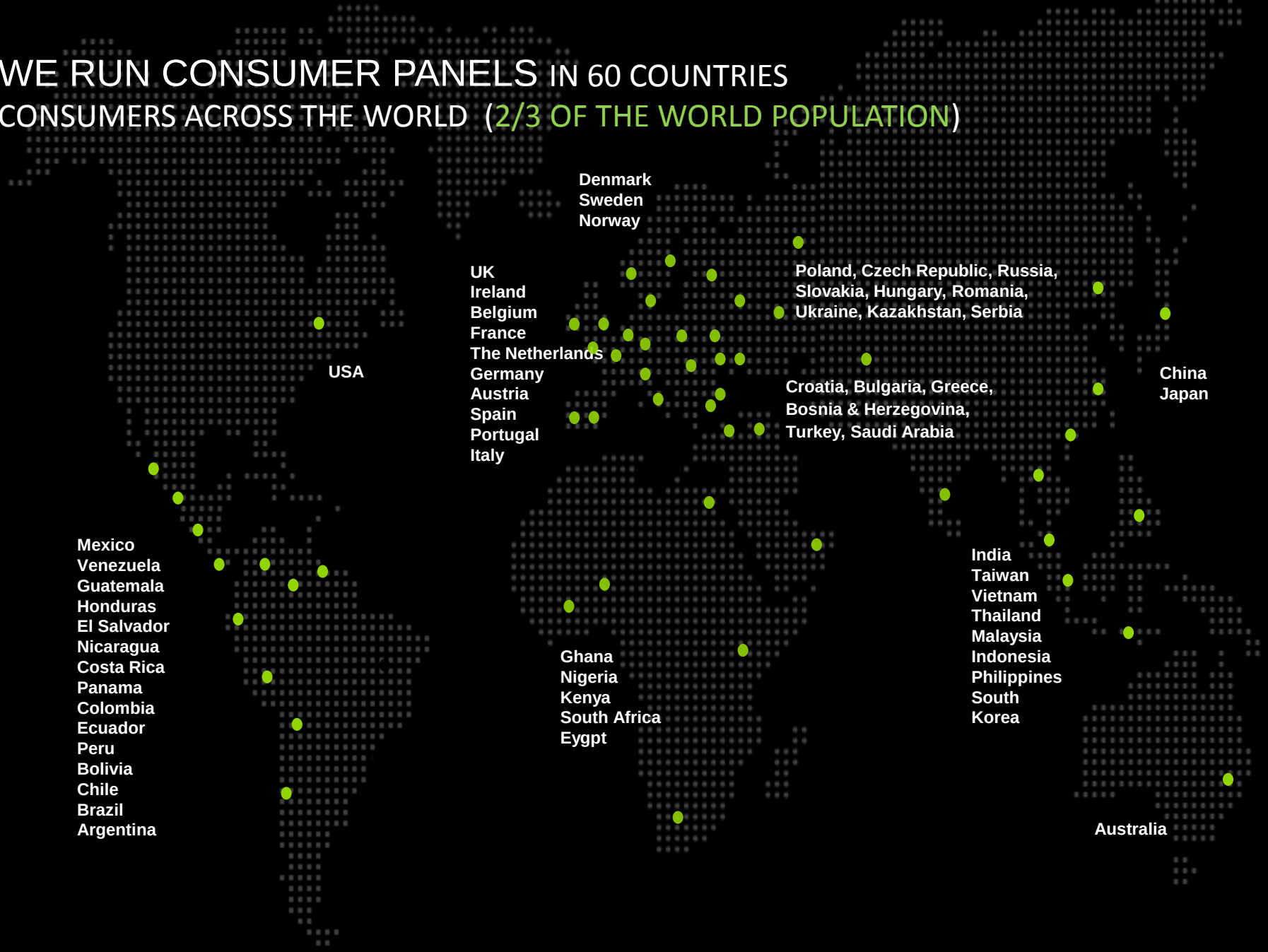
WE RUN CONSUMER PANELS IN 60 COUNTRIES

CONSUMERS ACROSS THE WORLD (2/3 OF THE WORLD POPULATION)



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We focus on doing one thing – track actual behavior

Purchase and Usage Behavior
Who, What, When, Where, How Much, and Why

Retailer

Price

Promotion

Product / SKU level

Total spend

© Kantar Worldpanel

A continuous shopping record over time

Ms Lee
Young family

Weekend 1

May Flower
X 24 pack
Costco

Weekend 1

Pampers L
172 P
Yahoo!

Mother's Day

LANEIGE
BB cushine
Yahoo!

Weekday

Coffee
Grande
Starbucks

Ms. Chen
Mix family

Birthday Party

Doritos
PX Mart

Week 3

UCC
Drop coffee x 72
COSTCO

Mother's Day

Kiehl's
250ml
SOGO

Week 9

Fruit juice
FamilyMart

Mr. Chang
Older couple

Weekday 1

107g
Glucosamine
Amway

Travel Japan

Takeda
Vitamin B Ex
Oversea

Weekday 2

Darlie
250mlx2 +
50ml
PX Mart

Weekend

Great Day
Sunflower oil 2L
Carrefour

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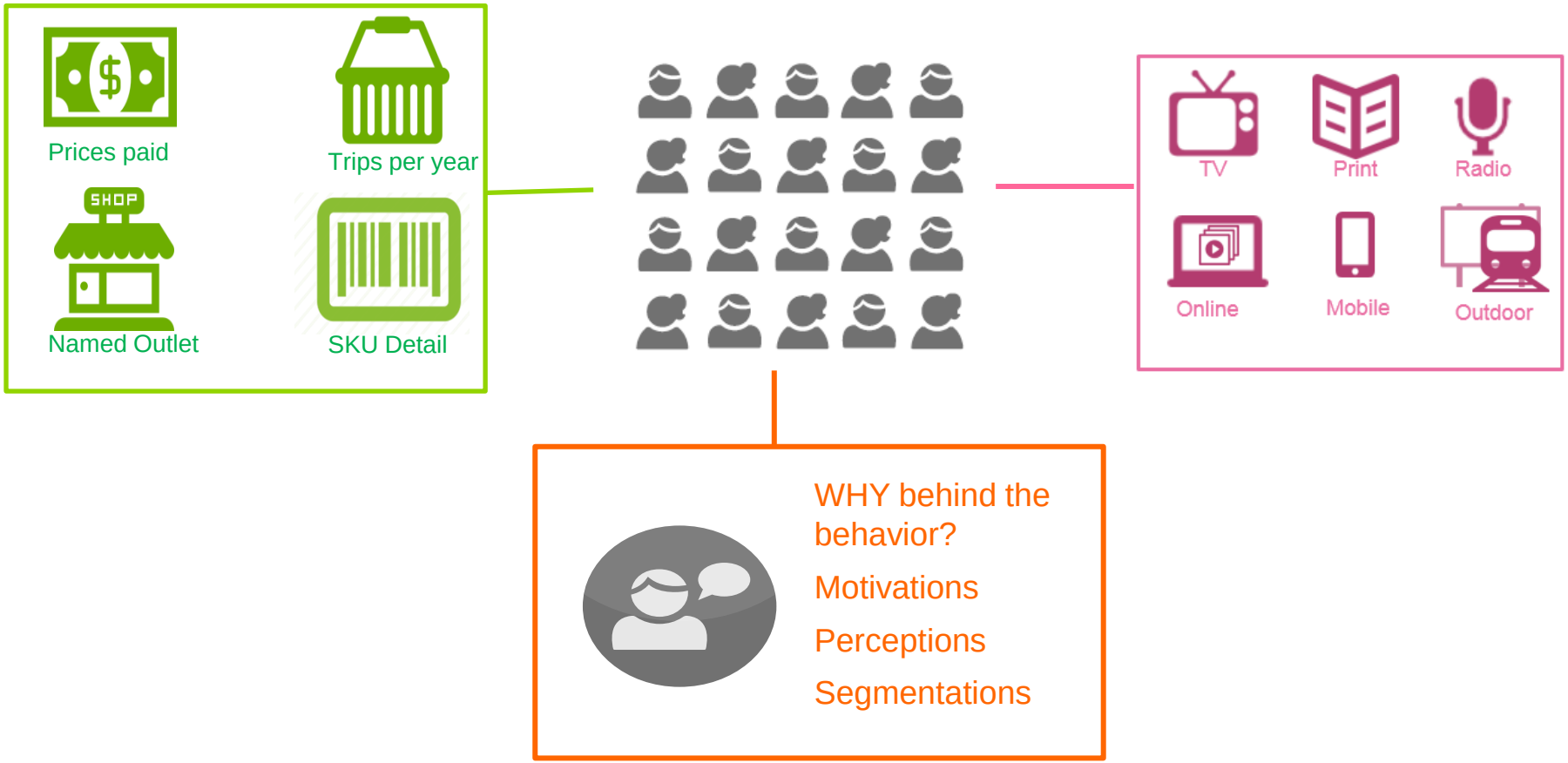
The extention of **What influence/trigger PURCHASE action**

in one set – what they buy, what they see&discuss, and how they think&feel



© Kantar Worldpanel

Zoom in Taiwan – Growth Rate FMCG for the past 6 years

Personal Care 2%

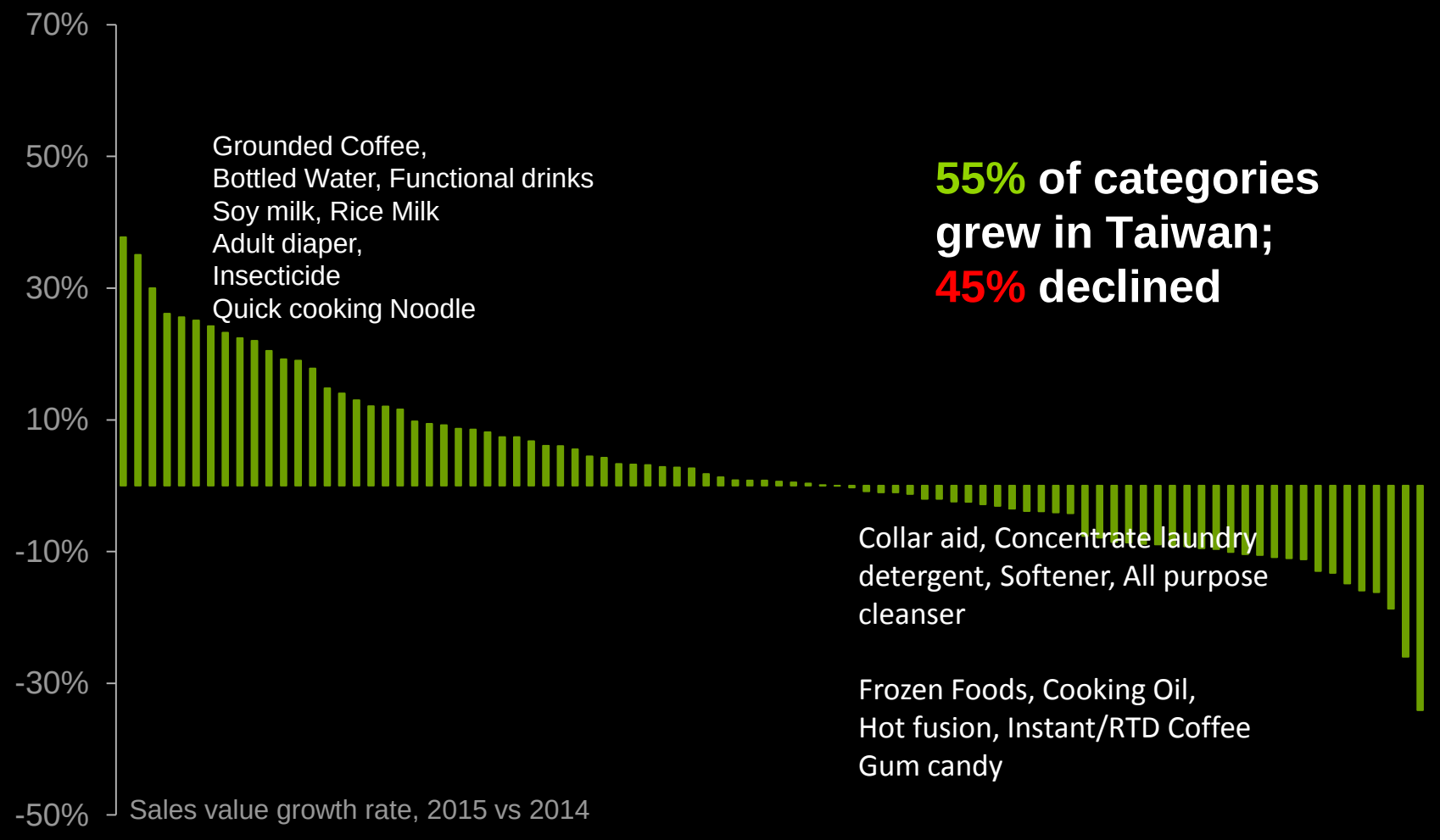
Food/beverage 1%

HH non-food -2%

Based on HH spending on 92 FMCG categories

© Kantar Worldpanel

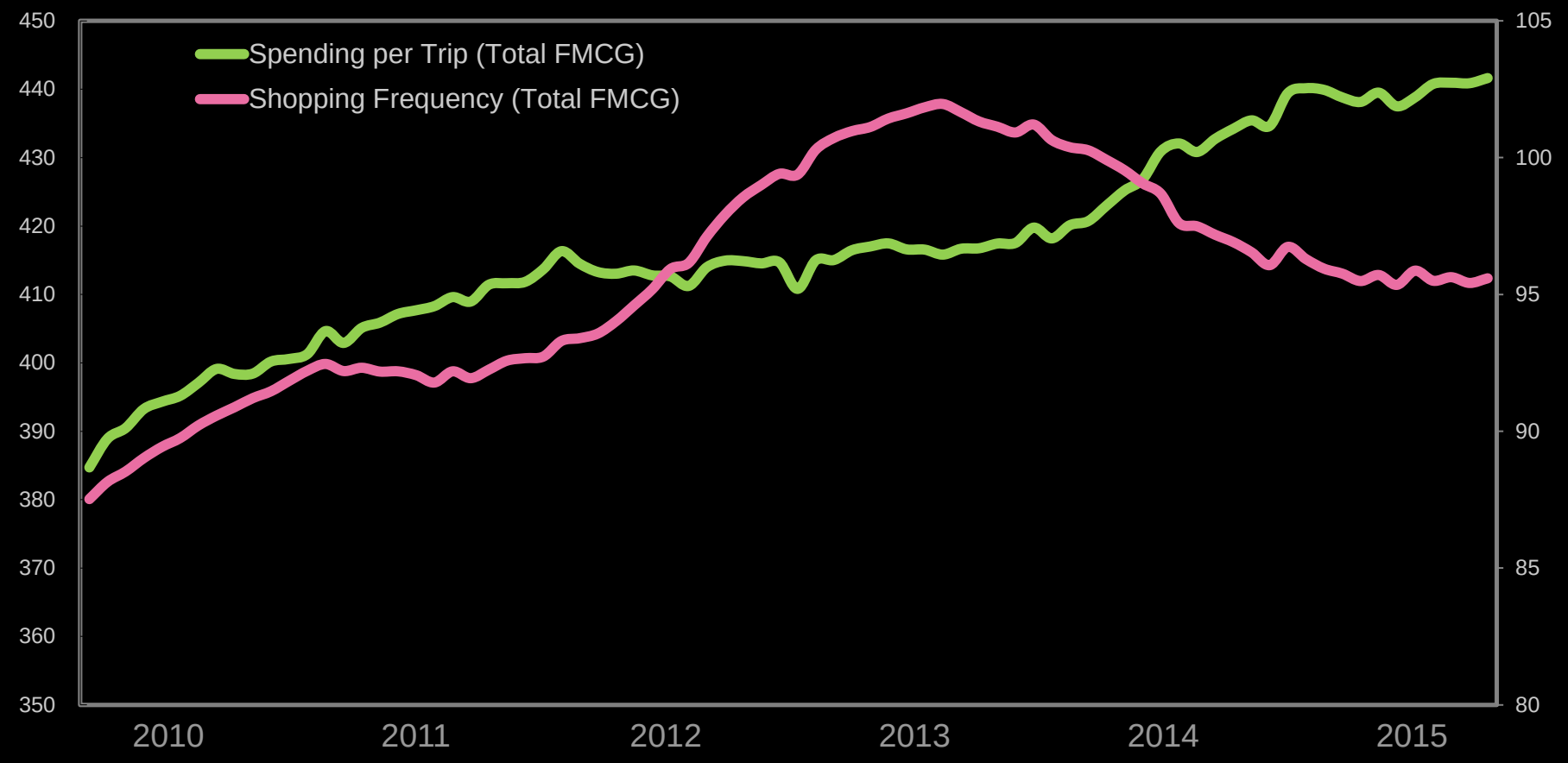
Zoom in Taiwan – the winning categories and the losing ones



55% of categories grew in Taiwan; 45% declined

© Kantar Worldpanel

Zoom in Taiwan – Shop less but spend more per trip

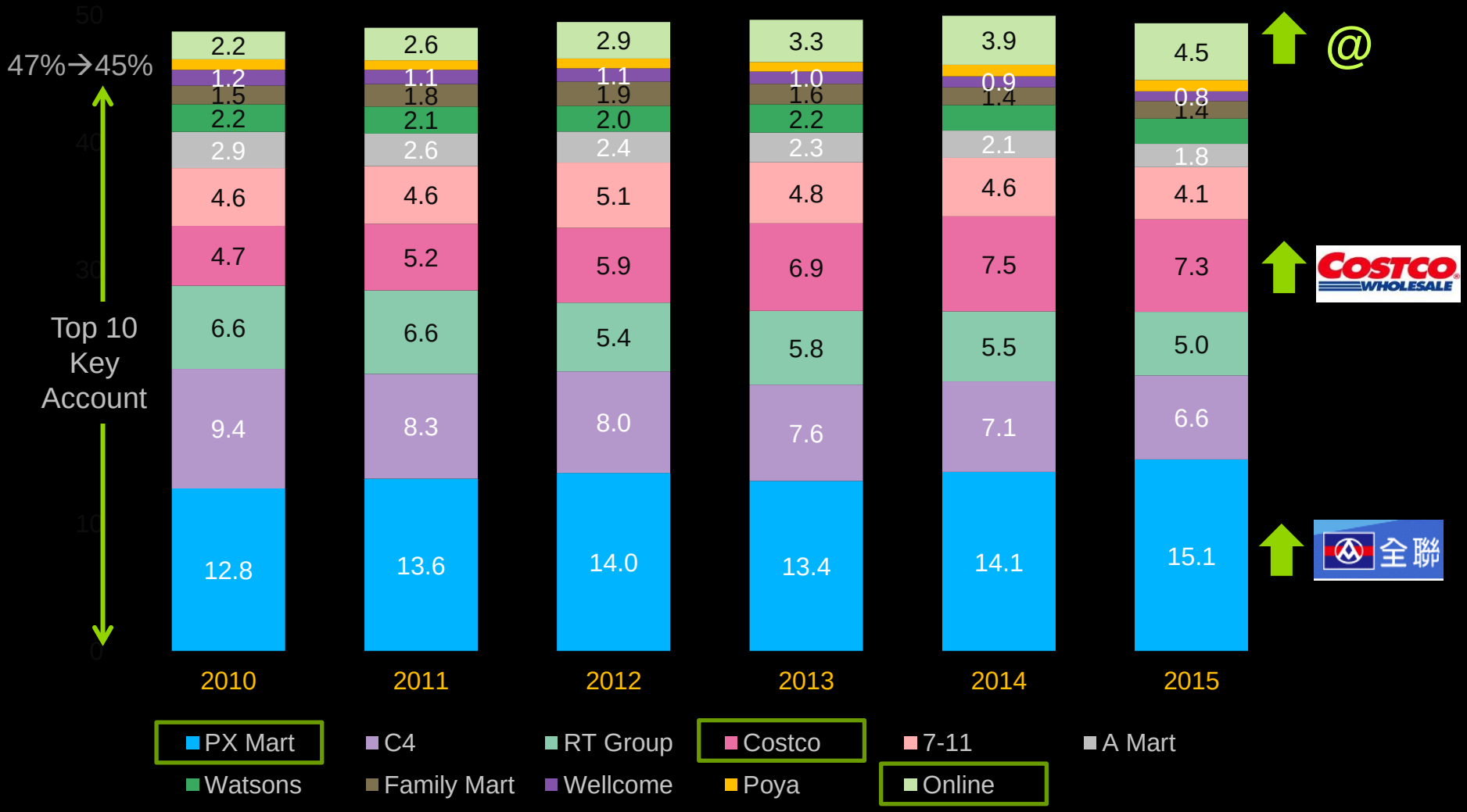


資料來源:凱度消費者指數-家戶指數

Source: Kantar Worldpanel Taiwan Household Panel

© Kantar Worldpanel

Zoom in Taiwan – Online shopping is the unstoppable trend; and PX mart and COSTCO both progress healthy

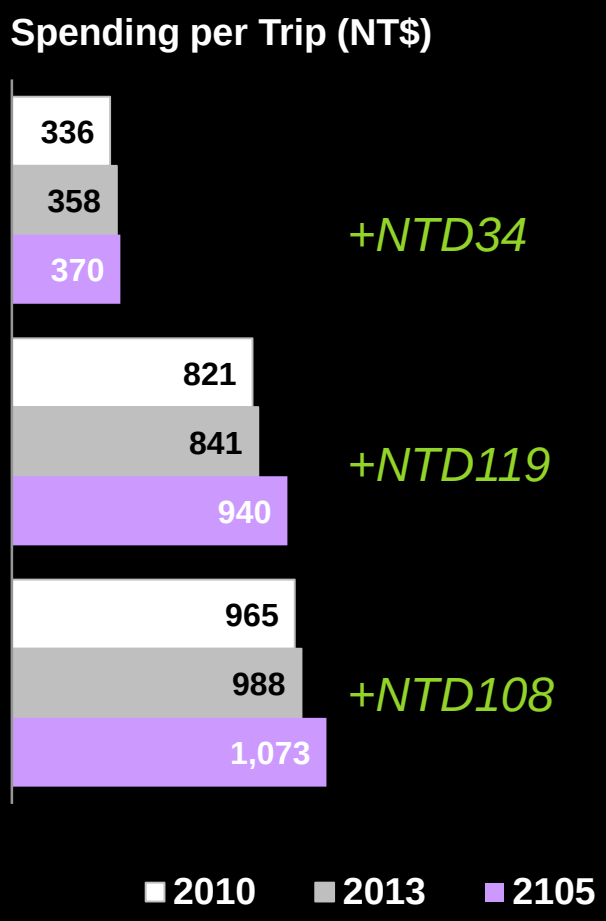


KANTAR WORLDPANEL

Source: Kantar Worldpanel Taiwan Household Panel

© Kantar Worldpanel

Zoom in Taiwan – the growth driver



WHAT IS ASIA BRAND POWER?

ASIA
BRAND
POWER

FMCG DECELERATES BUT ASIAN PLAYERS DRIVE GROWTH

IN Asia, GROWTH HAS FALLEN BY A HALF

ASIA BRAND POWER

10.1%

2013 v 2012

5.1%

2014 v 2013

4.6%

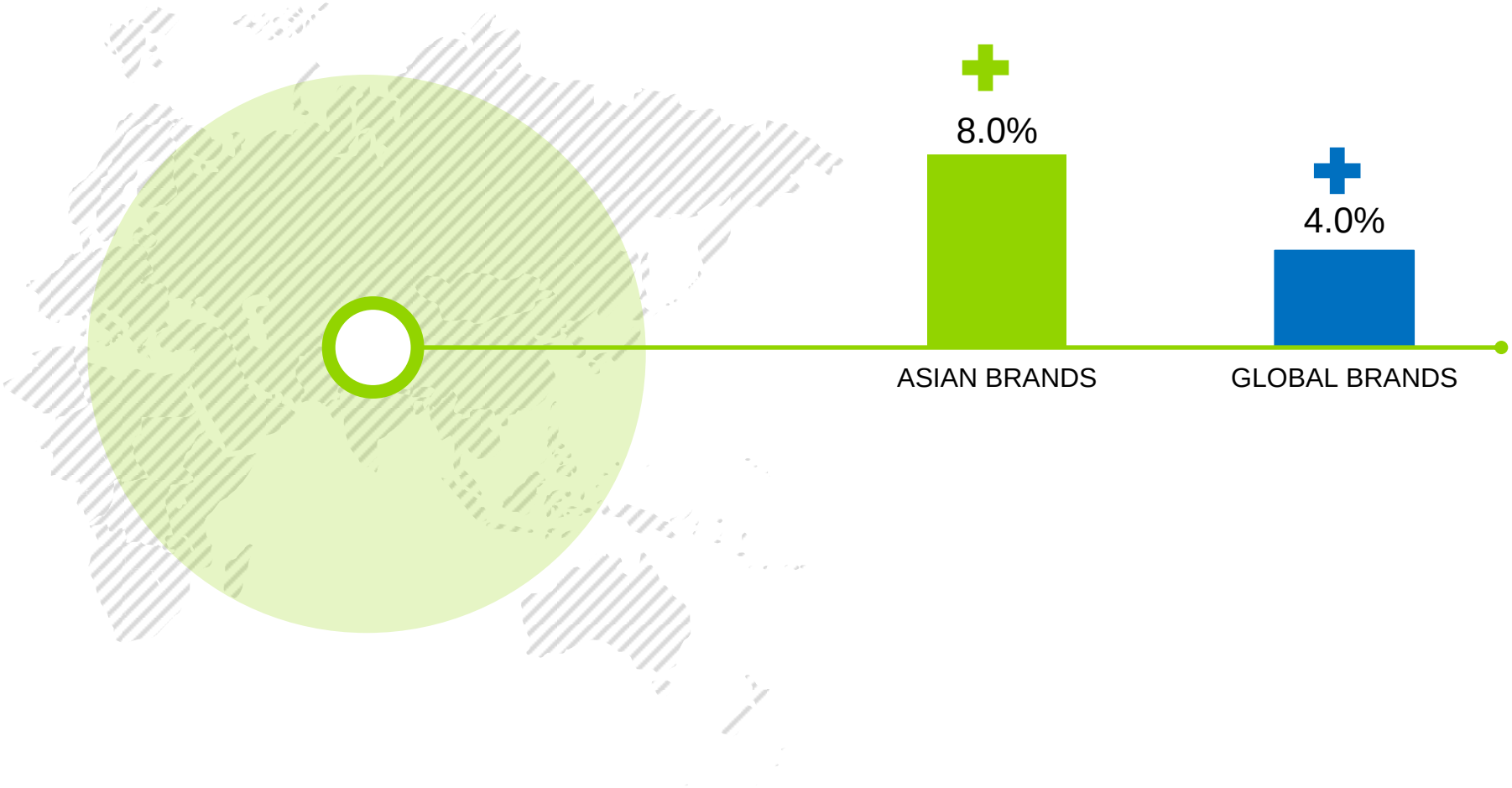
2015 v 2014

Source: Kantar Worldpanel China / FMCG / MAT Q2 / VALUE GROWTH%

ASIAN BRANDS ARE GROWING AT TWICE THE PACE THAN GLOBAL BRANDS

THEREFORE GAINING SHARE

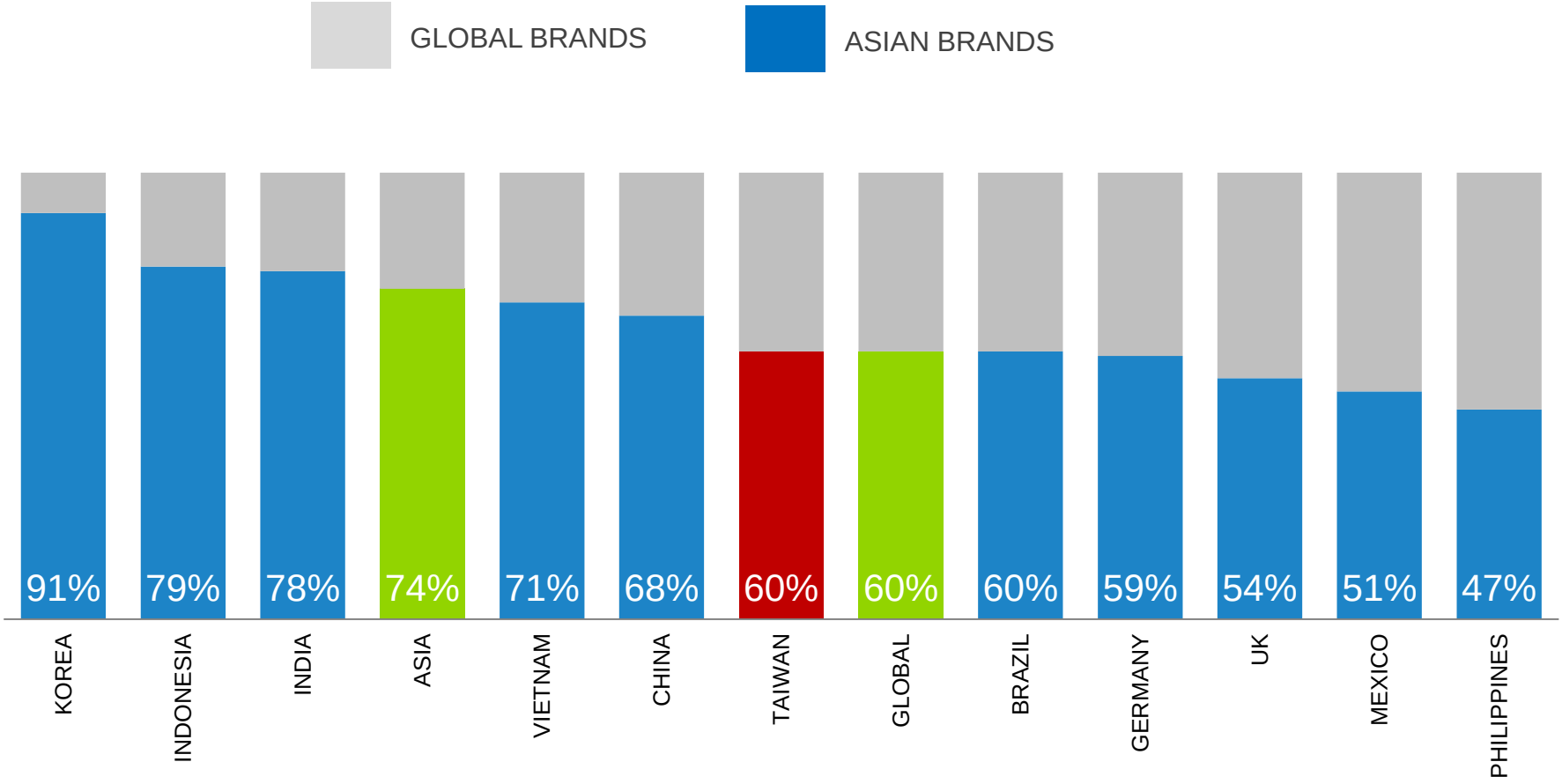
ASIA BRAND POWER



Source: Kantar Worldpanel Asia / FMCG / BRAND FOOTPRINT 2015/ Value Growth %

ASIA IS DIFFERENT

HOME GROWN BRANDS DOMINATE THE FMCG MARKET



Source: Kantar Worldpanel Asia / FMCG / BRAND FOOTPRINT 2015/ Value % Local Brands

11 brands talks Asia

GODREJ
Mr.Sunil Kataria,
Chief Operating Officer

MARICO
Mr. Sameer Satpathy,
CMO

YFY
Mr. Felix Ho,
Chairman

SANQUAN
Mr. Chen Xi
CEO

VINDA
Ms. Dong-Fang Chang
CEO

ICHITAN
Mr. Tan
Passakornnatee, CEO

REBISCO
Mr. Jonathan Ng,
President

MONDE NISSIN
Mr. Henry Soesanto,
CEO

AEKYUNG
Mr. Seok-Joo Lee,
Managing Director

MASAN
Mr. Seokhee Won,
CEO

MAYORA
Mr. Andre Sukendra
Atmadja, President

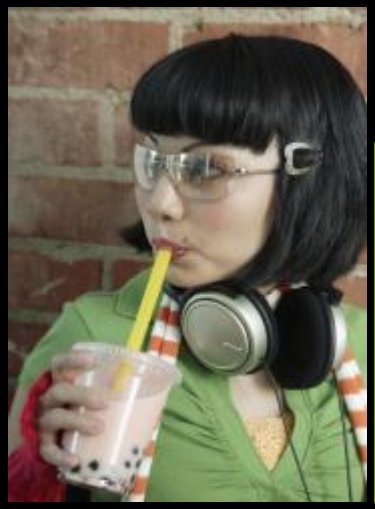
THE 5 ‘POWER LEVERS’

THAT ARE
CHANGING THE GAME

#1
MASTERS OF METAMORPHOSIS

#3
WORLD-CLASS INNOVATION WITH A LOCAL TWIST

#5
DATA-LED INTUITION



#2
BUILD THE NATION, BUILD THE BRAND

#4
DIGITISE AND HUMANISE

BUILD THE NATION,
BUILD THE BRAND

#2 BUILD THE NATION, BUILD THE BRAND

DECIDE ON YOUR ROLE: RESPONSIBLE FOR FUTURE GENERATIONS

Purpose is power

Uplift individuals
Uplift the community
Uplift the nation

Democratise your market

Accessible & affordable

BUILD A BETTER SOCIETY

Social Responsibility to the people and the land

Sustainability (永) Abundance (豐) Prosperity (餘)
Since its founding in 1924, YFY has stayed true to a set of core principles while maintaining flexibility in a changing environment

Participate carbon footprint verification. Aim at zero emissions, zero waste

FSC, PEFC certified paper products

"Purely Natural" detergent: Orange House

No. 1
local brand in Home Care

MAY FLOWER
五月花

+19%
Value Growth

“THE FOOD INDUSTRY IS AN HONEST PROFESSION”

AN ICON OF THE SAFE FOODS

Insist the quality and safety of the foods produced by following 5 principles

- Check the material’s source of origin
- Investigate material price
- Refer the client list
- Advance the examination capability
- Fully check and review the products

+29%
Value Growth

84%
Penetration

No. 1 CRP brand in Taiwan (+25%)

“CHANGE YOUR HAIR OIL WITH PRIDE”

MARICO EMBARKS ON A PURPOSE DRIVEN CAMPAIGN

Nihar Naturals Shanti Badam Amla Hair Oil enables women to actively contribute to progress as part of the proceeds from the brand goes towards children's education

+18%
Value Growth

+5.5 M
House holds

1.1 M
Kids two year education

ASIA
BRAND
POWER

“FORTUNE NO.1: THERE´S NO FOOD LIKE HOME”

COOKING OIL BRAND: CREATE A FORUM FOR MOTHERS WHOSE CHILDREN ARE STUDYING IN ANOTHER CITY.

ASIA BRAND POWER

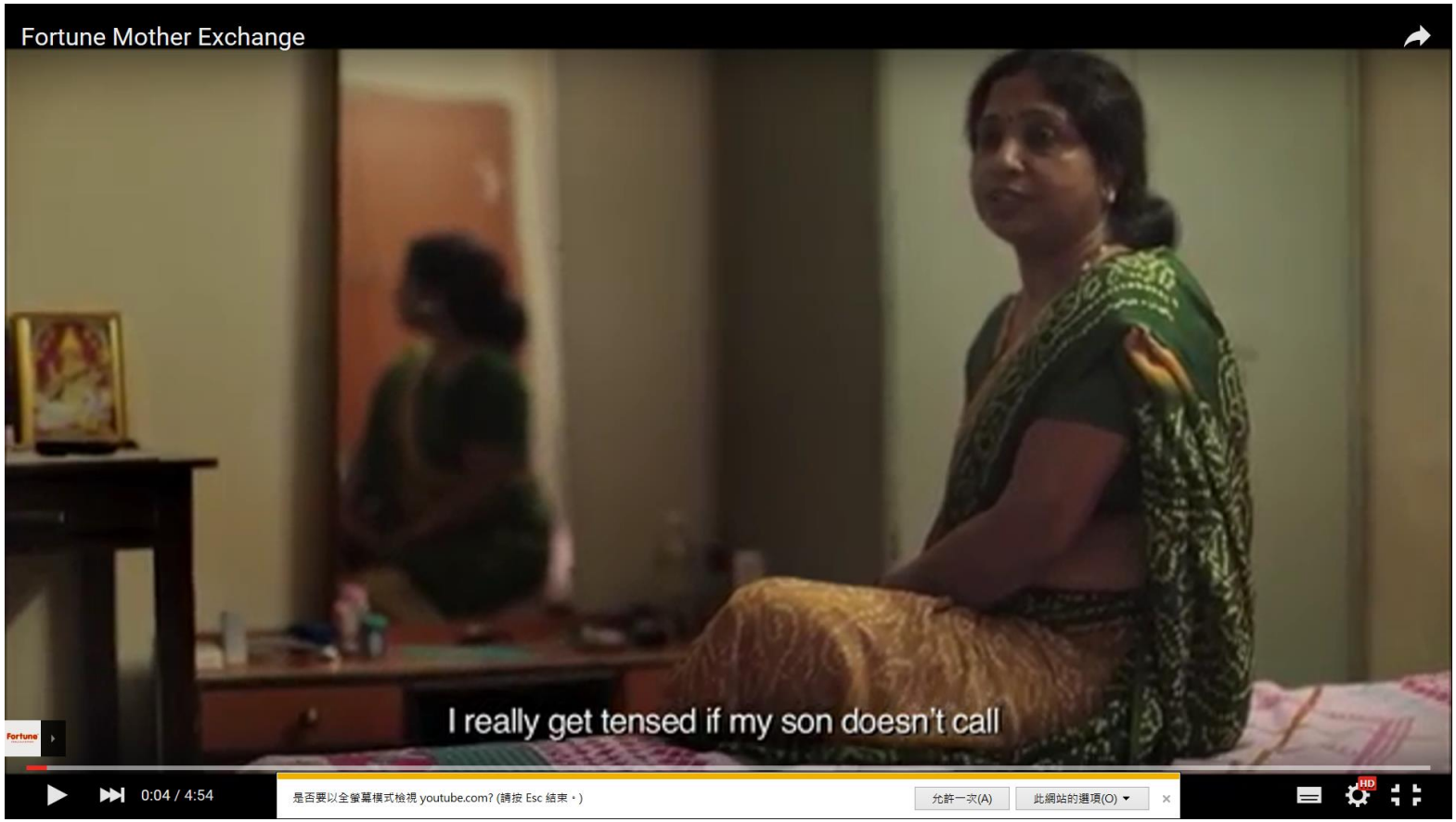
It allows them to connect with their peers and exchange recipes, while their children are able to enjoy home food.

+20%
Value Growth

+6.7 M
Households

Forum for mothers to share recipes

From 15 to 19.7% penetration



https://youtu.be/h22M4-0rAUg

CHAO-NENG SUCCESS RELIES ON “POUCH FORMAT”, AN AFFORDABLE OPTION

12.4 RMB/KG

10.4 RMB/KG

2 million

new laundry liquid category buyers added through this package

+24%

growth in sales

Joins top 10 China’s homecare brands two years after its launch in 2006

WORLD-CLASS INNOVATION WITH A LOCAL TWIST

#3 WORLD-CLASS INNOVATION WITH A LOCAL TWIST

FIND COMPETITIVE ADVANTAGE IN CULTURE

Respect heritage

Reflect national culture, align with local values, genuinely Asian

Identify unspoken cultural truths

Basics delivered in an authentic way

Best of two worlds

Modernise without abandoning past; fuse technology & tradition

QUALITY, QUALITY, QUALITY

“VINDA´S STRENGTH RELIES ON TOP QUALITY AND CHANNEL MANAGEMENT”

ASIA BRAND POWER

Wedding dress design made of tissue

Vinda is one of the FMCG front runners in China to go for online-offline integrated Marketing and e-commerce; its online sales account for 7% of their revenue

+7%
Value Growth

13M
New buyers for Ultra Strong inter-folder tissue latest 12 months

Porfolio diversification: from paper to baby care and feminine care

ASIA
BRAND
POWER

全球首个纸巾婚纱艺术展即将拉开帷幕

THE WORLD'S FIRST TISSUE WEDDING DRESS SHOW IS ABOUT TO BEGIN SOON

“WARDAH HAS RE-SHAPED THE INDONESIAN COSMETICS CATEGORY”

Cultural authenticity behind continued success: Halal cosmetics

+24%
Value Growth

Strong Halal claims

Taps into ‘Jilbaber style’ —chic, fashionable and beauty conscious

The muslim population is expected to grow twice As fast as the rest of the world’s population between now and 2050.By then, muslims will account for 10% of Europe’s population, a reason to tap into halal beauty segment

ASIA
BRAND
POWER

DIGITISE AND HUMANISE

#4 DIGITISE & HUMANISE

Digitise
Use digital creatively, invest on e-commerce

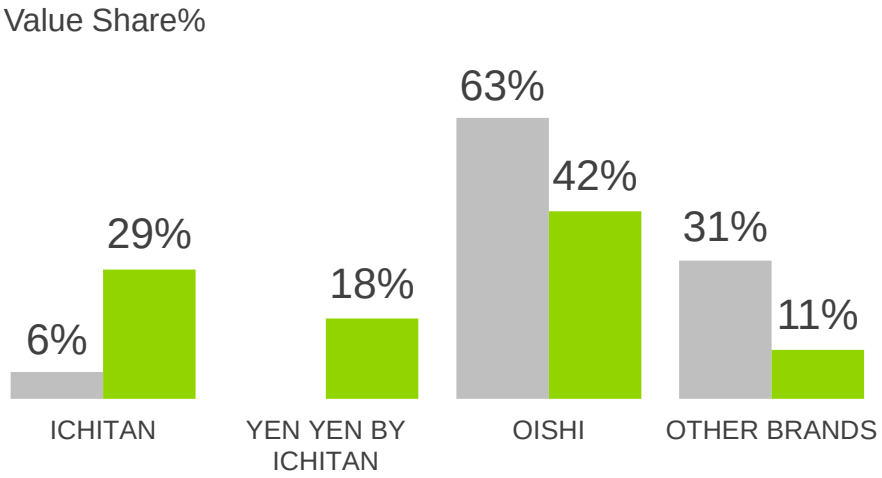
Humanise:
An emotional wrapper is vital, memorable & relatable story

FOR DEEPER CONSUMER CONNECTION

ICHITAN

ASIA BRAND POWER

"ICHITAN: GAME CHANGER IN THAILAND´S RTD TEA MARKET"



3.5M
Facebook fans

#1 BRAND
after 18 months launch

Master of contests

Strong digital footprint

ICHITAN

ICHITAN GREENTEA

ASIA BRAND POWER

Be Celebrity himself
Over 10M Fans

"WE USE ALL KIND OF MEDIA TO REACH AND INTERACT WITH CONSUMERS, TO MAKE
SURE WE ARE PART OF THEIR LIFE"

Tan Passakornnatee

Make Money & Do the Charity

TAN PAN Foundation

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อิชิตัน รหัสรวยเปรี้ยง รางวัลแห่งชีวิต

รหัสผู้โชคดี ประจำวันที่ 1 เมษายน 2559 ที่ได้รับรางวัล

เบนซ์ GLA 200 URBAN

ราคา 2.09 ล้านบาท

0 6 2 4 3 8 0 4 7 9

รางวัลสำรอง ลำดับที่ 1	รางวัลสำรอง ลำดับที่ 2
(ประจำวันที่ 1 เมษายน 2559)	(ประจำวันที่ 1 เมษายน 2559)
1915437293	0280346362
หมายเลขโทรศัพท์ผู้โชคดี	หมายเลขโทรศัพท์ผู้โชคดี
098-045-XXXX	061-447-XXXX

รางวัลสำรอง ลำดับที่ 3	รางวัลสำรอง ลำดับที่ 4
(ประจำวันที่ 1 เมษายน 2559)	(ประจำวันที่ 1 เมษายน 2559)
9301241363	0296365338
หมายเลขโทรศัพท์ผู้โชคดี	หมายเลขโทรศัพท์ผู้โชคดี
098-835-XXXX	093-730-XXXX

ICHITAN
Like This Page · 53 mins ·

อิชิตันรหัสรวยเปรี้ยง รางวัลแห่งชีวิต งวดที่ 20 ประจำวันที่ 1 เมษายน 2559 ขอแสดงความดีใจกับผู้โชคดีประจำงวดที่ 20 ได้รับรางวัล รถเบนซ์ GLA 200 Urban พร้อมประกันภัยชั้น 1 มูลค่า 2,090,000 บาท
รหัสที่ออก 0624380479 เบอร์มือถือ 094-113-XXXX
ตรวจผลรางวัลได้ที่http://www.ichitandrink.com/
อิชิตัน จะติดต่อกลับไปหาผู้ถูกรางวัลอิชิตันภายใน 24 ชั่วโมง

ยังมีเบนซ์อีก 9 คัน และคอนโดหรูใจกลางซอยทองหล่อมูลค่า 15 ล้านบาทให้ลุ้นส่งรหัสได้ทุกวัน ยิ่งส่งมาก ยิ่งมีสิทธิ์มาก

See Translation

Like · Comment · Share

3.5K · Top Comments

253 shares · 88 comments

Kridsada Karising ถึงผมไม่ได้รถผมก็จะอุดหนุนคุณตันอย่างนี้ต่อไปเรื่อยเพราะผมกสัวคุณตันเจ้งคับจากใจเลย
See Translation
Like · Reply · 5 mins

Natthawat Thanjai อีกนานแค่ไหนจนกว่าชิ้นจะได้ บอกที... ไม่เป็นไรครับ ส่งต่อไป สักวัน ต้องได้
See Translation
Like · Reply · 2 · 47 mins

Joy Soodsuay ส่งทุกวัน ผิดหวังทุกที แต่ถึงยังงัยก็อจะส่งต่อไปเผื่อสักวันโชคจะเป็นของเราบ้างค่ะ
See Translation
Like · Reply · 1 · 37 mins

ยัยกวาง จอมซ่า สวัสดีคับคุณเชื่ออะไรยุที่ไหนคับ ผมตันอิชิตันคับยินดีด้วยนะคับคุณคือผู้โชคดีได้เบนคับดีใจด้วยนะคับอยากได้ยินแบบนี้กับเค้าบ้างจัง
See Translation
Like · Reply · 1 · 17 mins

'กุลจิรา วงษ์ลา' จำระหัสบ่ได้หรอก รอแค่เสียงโทรศัพย์คุณตันแค่นั้นแหละเพราะส่งมาเยอะละ
See Translation
Like · Reply · 35 mins

Write a comment...

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ประกาศรางวัล ของรางวัล กฎ กติกาและวิธีการส่ง TVC เข้าสู่เว็บอิชิตันครั้งค์

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“MILK MARKET LEADER YILI SETS AN EXPAMPLE OF DIGITAL FOOTPRINT”

ASIA BRAND POWER

DIGITAL

NEWS - RP

SINA WEIBO

WECHAT

88%
Penetration

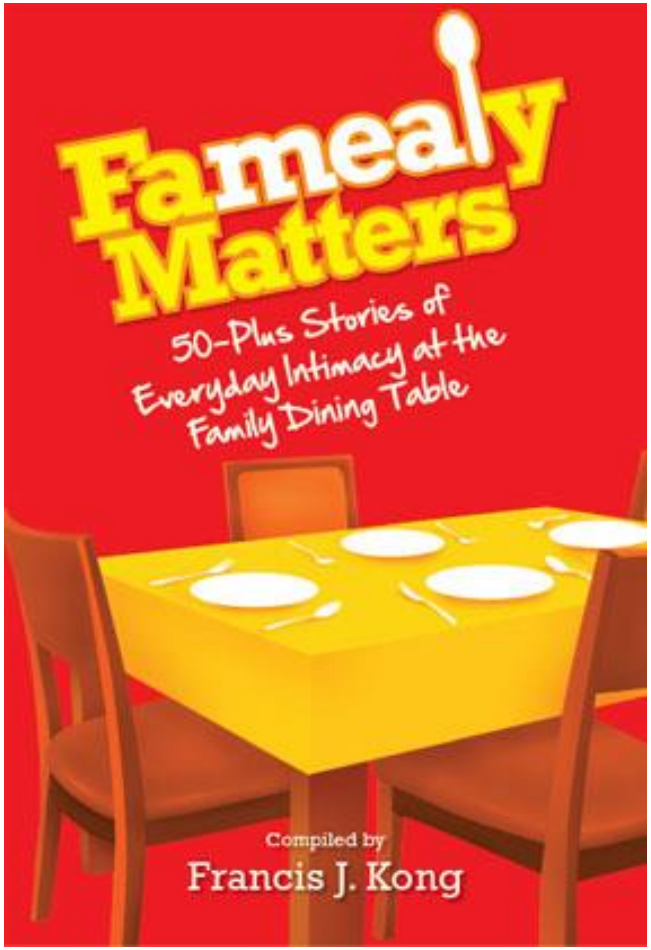
+13
Value growth

#1 BRAND
25% share

LUCKY ME! ADVOCACY “FAMEALY TIME”

Strengthen the family as a unit through the pleasure and intimacy of time spent together

ASIA BRAND POWER



#1
Food Brand in the Philippines

Purchased by 98% Philipino families

The noblest way of giving back to society is by raising happy, healthy, and successful children. Lucky Me! aims to remind parents of their very critical role at the dining table.

“we want to uplift the lives of the people we serve”

DATA-LED INTUITION

MASTER ASIAN BRAND MANIFESTO

CHECK LIST

ASIA BRAND POWER

ASIA BRAND POWER

#1
BE WILLING TO CHANGE AND ADAPT, AND NOT AFRAID TO FAIL. ✓

#2
DEMOCRATISE YOUR CATEGORIES ✓

#3
PURPOSE IS POWER. ✓

#4
HELP PEOPLE MODERNISE, WITHOUT ABANDONING THE PAST ✓

#5
INNOVATE AT LIGHTNING SPEED. ✓

#6
USE DIGITAL FOR CREATIVELY INTERACTIVE COMMUNICATION. ✓

#7
STUDY CONSUMERS TO SHED LIGHT ON THE FUTURE. ✓

#8
AN 'EMOTIONAL WRAPPER' IS VITAL. ✓

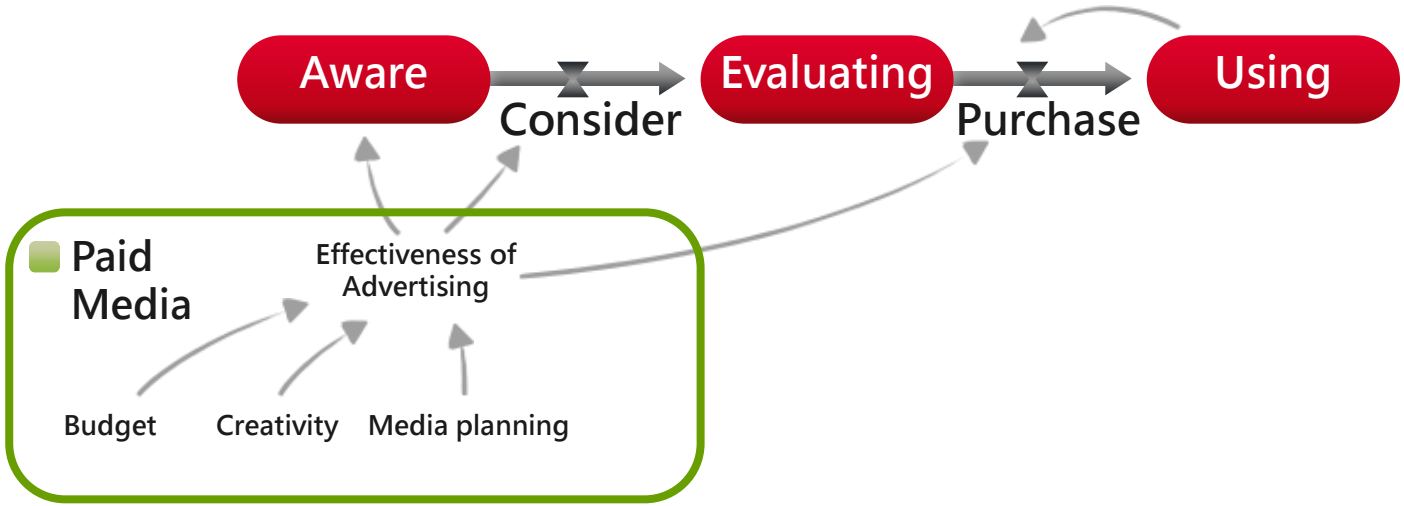
#9
NEVER COMPROMISE ON QUALITY. ✓

#10
INVEST IN THE FUTURE. ✓

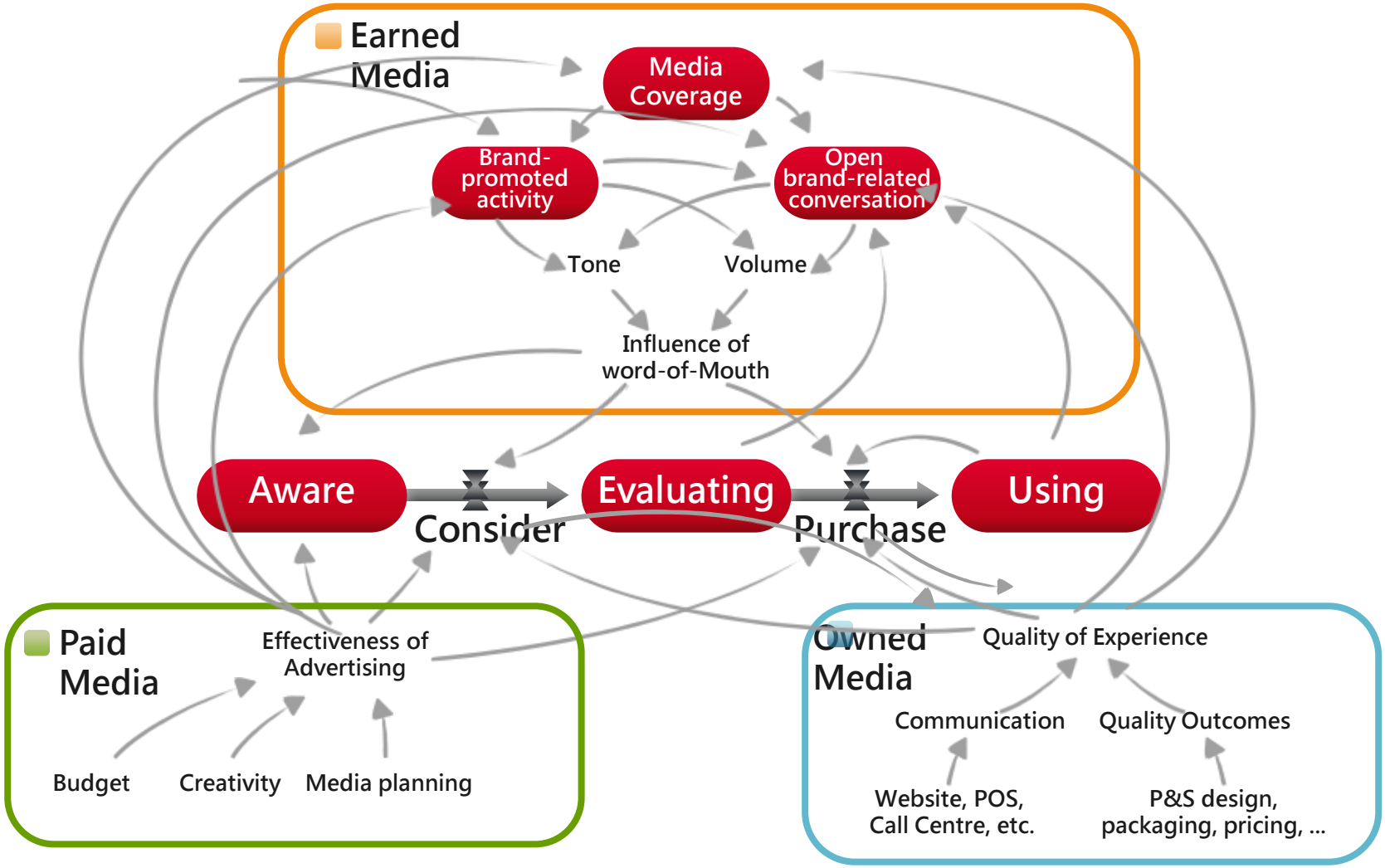
OUR REMINDER

ASIA BRAND POWER

The Past: path to brand purchase was a linear relationship thus managing the purchase funnel was easier



Nowadays: Contact planning is becoming increasingly complex given the proliferation of touchpoints

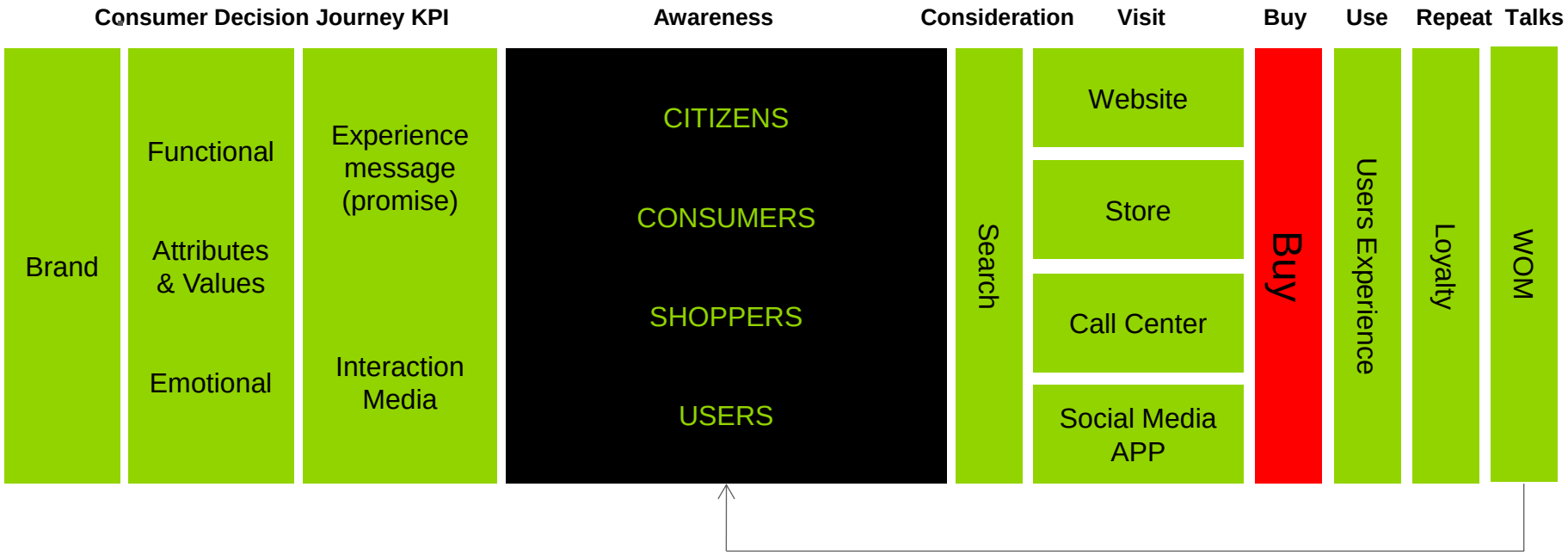


CHALLENGES IN MEDIA PLANNING AND BUYING - TRANSPARENCY

CHALLENGES IN MEDIA PLANNING AND BUYING - ATTENTION

Company needs to build up an integrated system

- Need to have complete view of the consumers
- No more silo work, all functions work consistently to increase BUY behaviors
- Anticipate emerging needs and innovate for growth



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