Taiwan FMCG Monitor

2016 Q1

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2016 Q1 KEY ECONOMICS

-0.68% GDP Growth Rate 2016Q1

+1.74% CPI Growth Rate 2016Q1

3.89% Unemployment Rate 2016Q1

0% Total FMCG VSLY

- Taiwan total FMCG maintain stable. After food safety crisis, the growth of healthy and nature trend in food categories is observed. However, it is also discovered that category with food safety scandal has been gradually recovered. Besides, the premiumisation trend in non food category has been weaken, and lead to slightly decreased in non food categories.
- Channel-wise, hypermarket shows decline trend, while PX performs well in food category. Online-shopping also grow in health supplement and personal care products.

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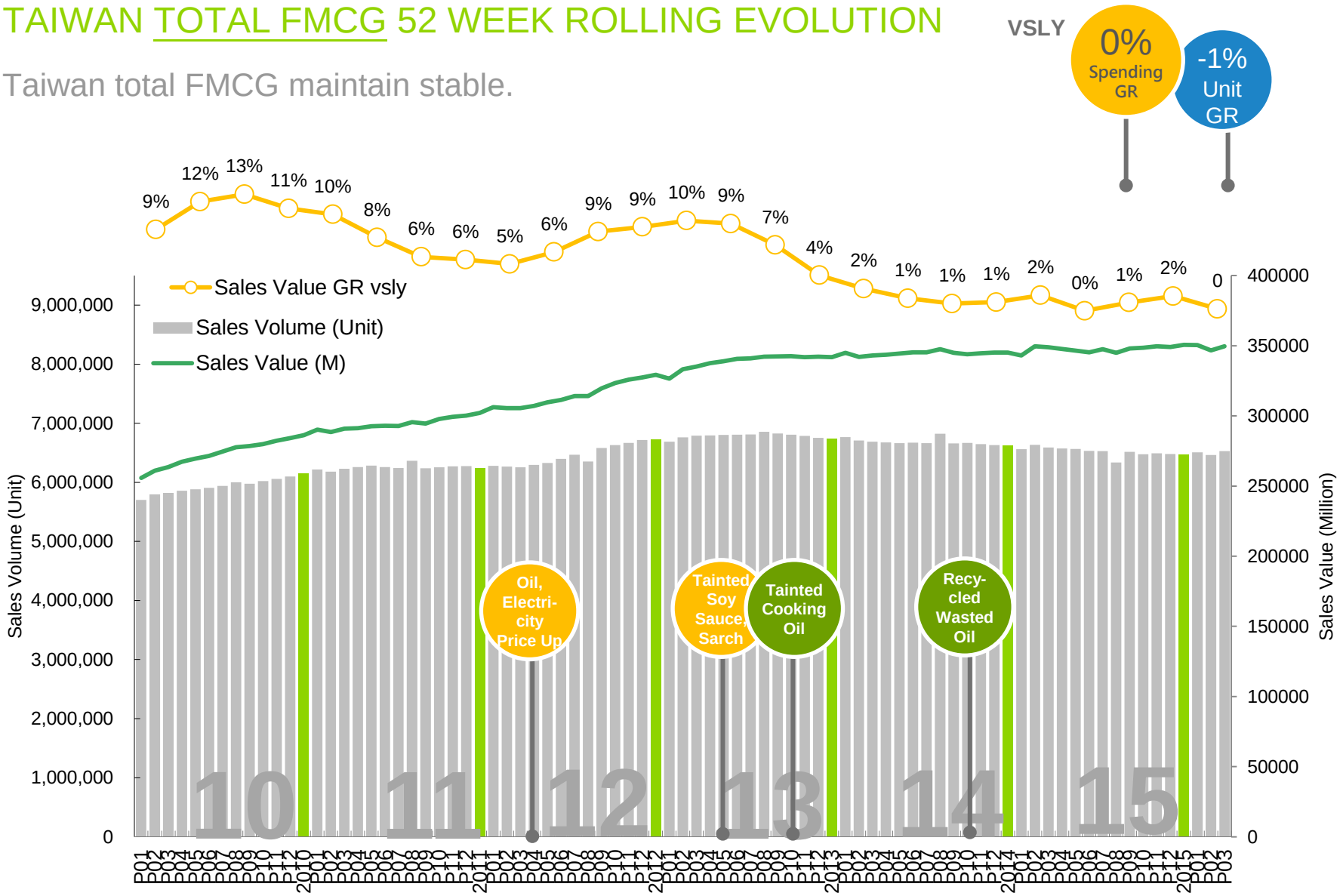
TAIWAN TOTAL FMCG 52 WEEK ROLLING EVOLUTION

Taiwan total FMCG maintain stable.



Source: Kantar Worldpanel Taiwan Household Panel

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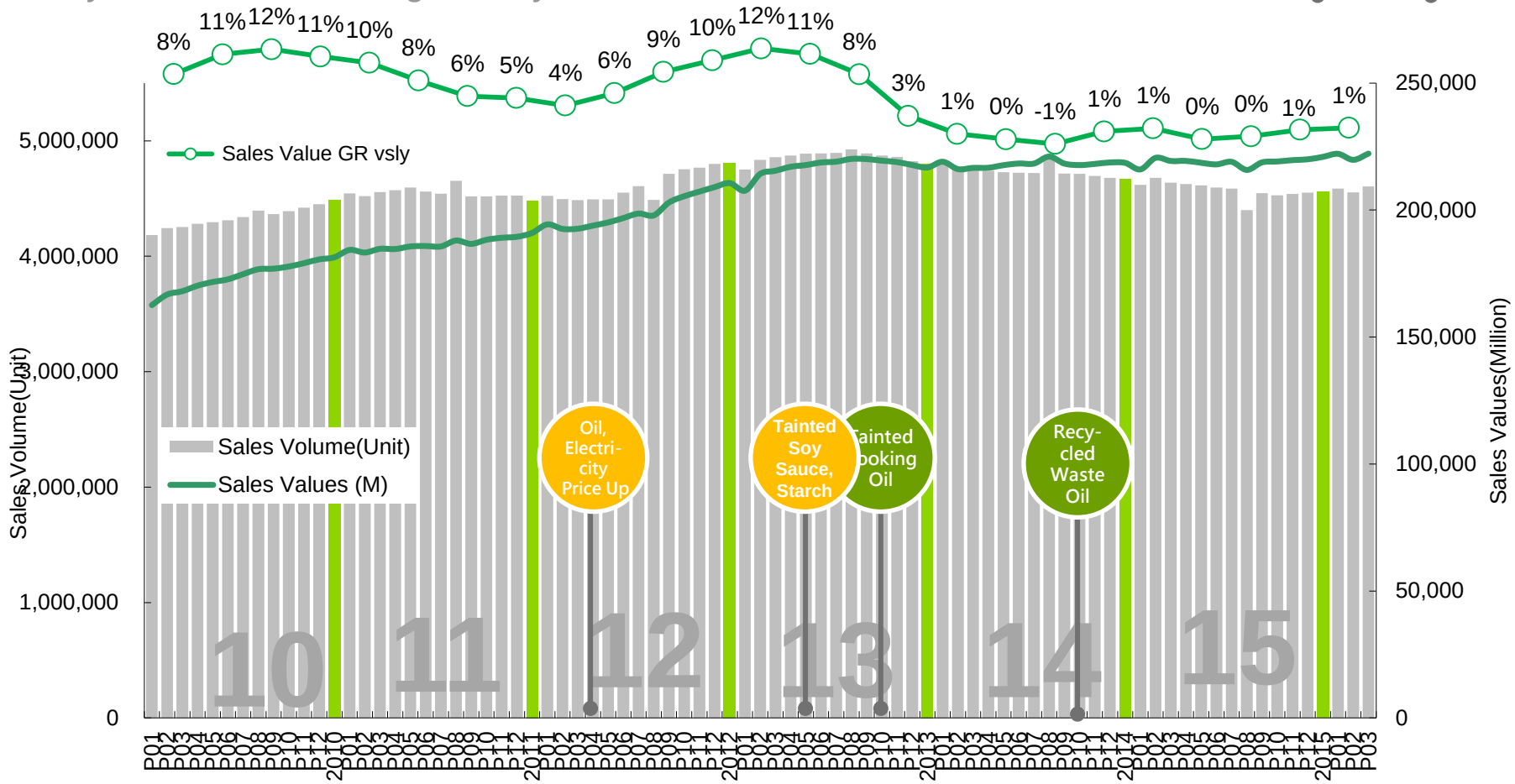
TAIWAN FOOD CATEGORY 52 WEEK ROLLING EVOLUTION

After food safety crisis, the growth of healthy and nature trend in food categories is observed. However, it is also discovered that category with food safety scandal has been gradually recovered.



Source: Kantar Worldpanel Taiwan Household Panel

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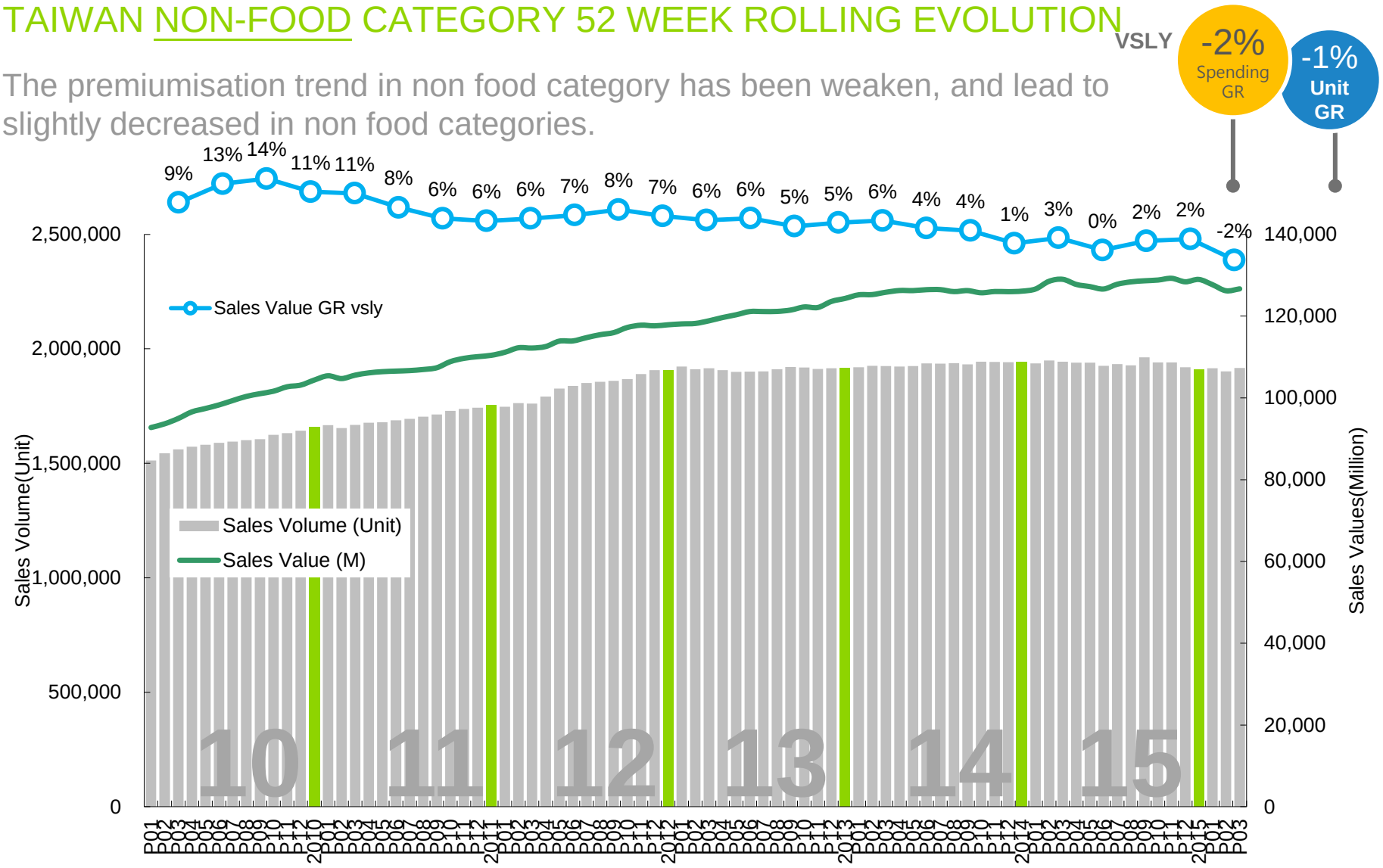
TAIWAN NON-FOOD CATEGORY 52 WEEK ROLLING EVOLUTION

The premiumisation trend in non food category has been weaken, and lead to slightly decreased in non food categories.



Source: Kantar Worldpanel Taiwan Household Panel

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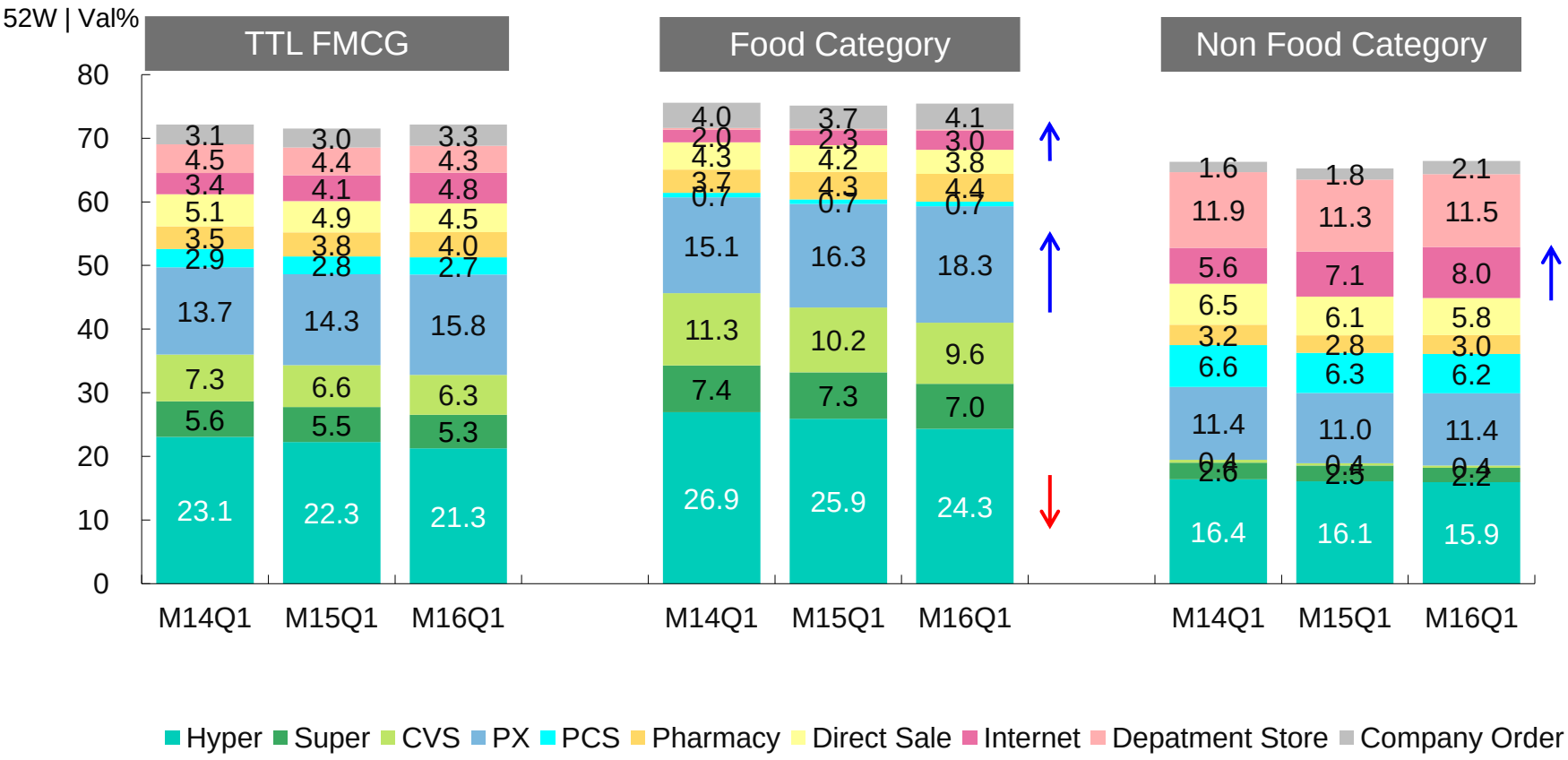
KEY CHANNEL SNAPSHOT – VALUE %

Hypermarkets lose share in food categories, especially in frozen food, fresh milk and liquid yogurt. PX shows good performance in fresh milk and instant noodles. Online gains share in health supplement, hair treatment, skincare and make up products.



Source: Kantar Worldpanel Taiwan Household Panel

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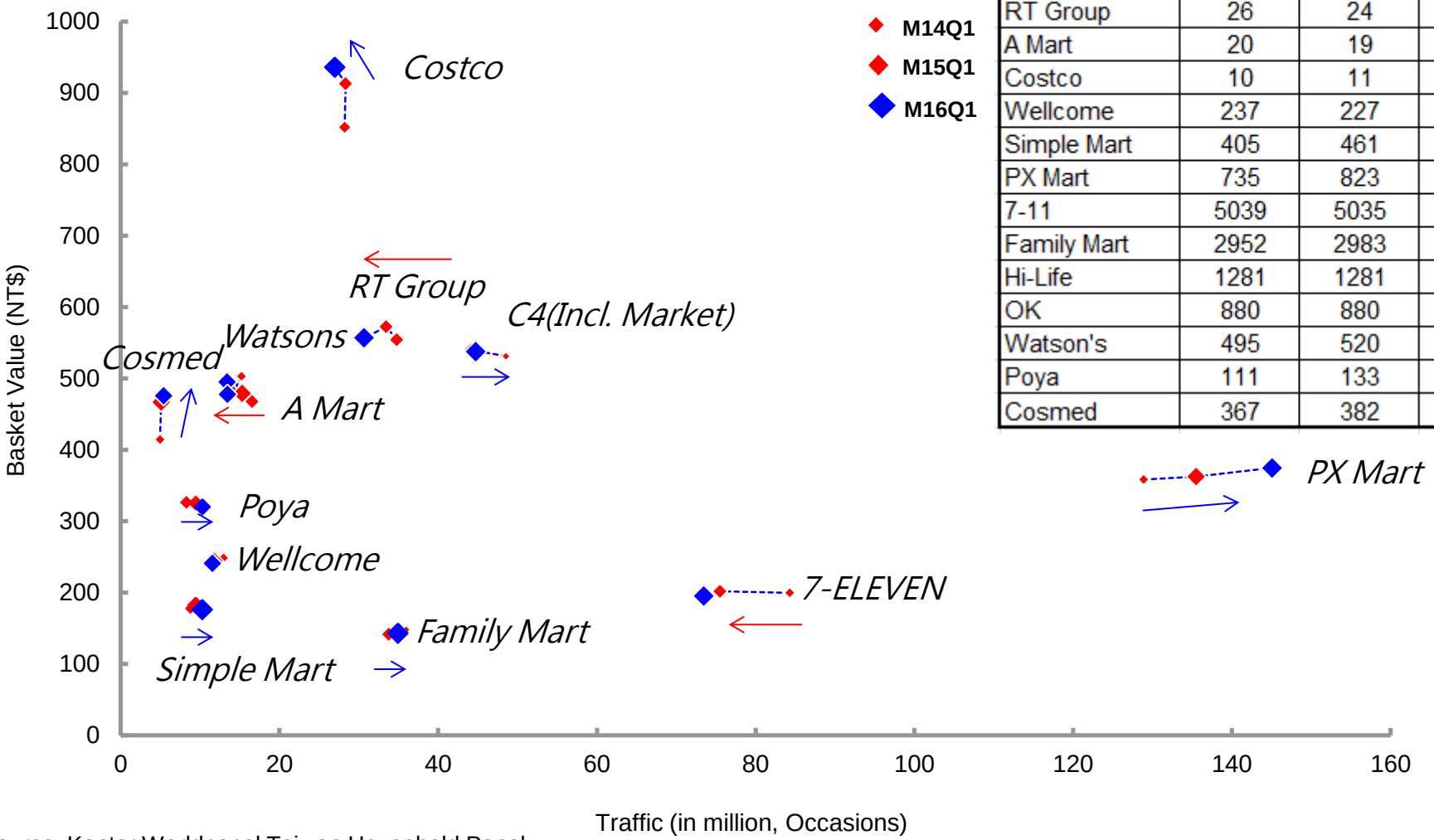
RETAILER HEALTH – TRAFFIC vs. BASKET VALUE



Store	15Q1	16Q1	GR%
C4(incl. Market)	71	85	+20%
RT Group	26	24	-8%
A Mart	20	19	-5%
Costco	10	11	+10%
Wellcome	237	227	-4%
Simple Mart	405	461	+14%
PX Mart	735	823	+12%
7-11	5039	5035	0%
Family Mart	2952	2983	+1%
Hi-Life	1281	1281	+0%
OK	880	880	+0%
Watson's	495	520	+5%
Poya	111	133	+20%
Cosmed	367	382	+4%

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