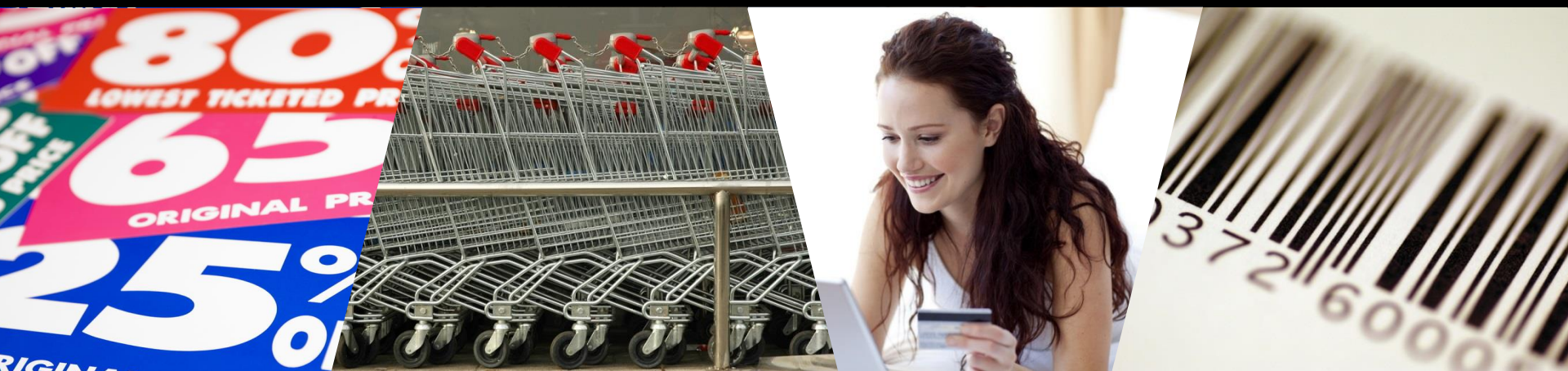




Taiwan FMCG Monitor

2016 Q2



2016 Q2 Key Economic Index

GDP
Growth Rate

+0.69%

2016Q2

CPI
Growth Rate

+1.54%

2016Q2

Consumer
Confidence Index
(CCI)

78.36

2016 June

Total FMCG
VSLY

+2.6%

2016Q2

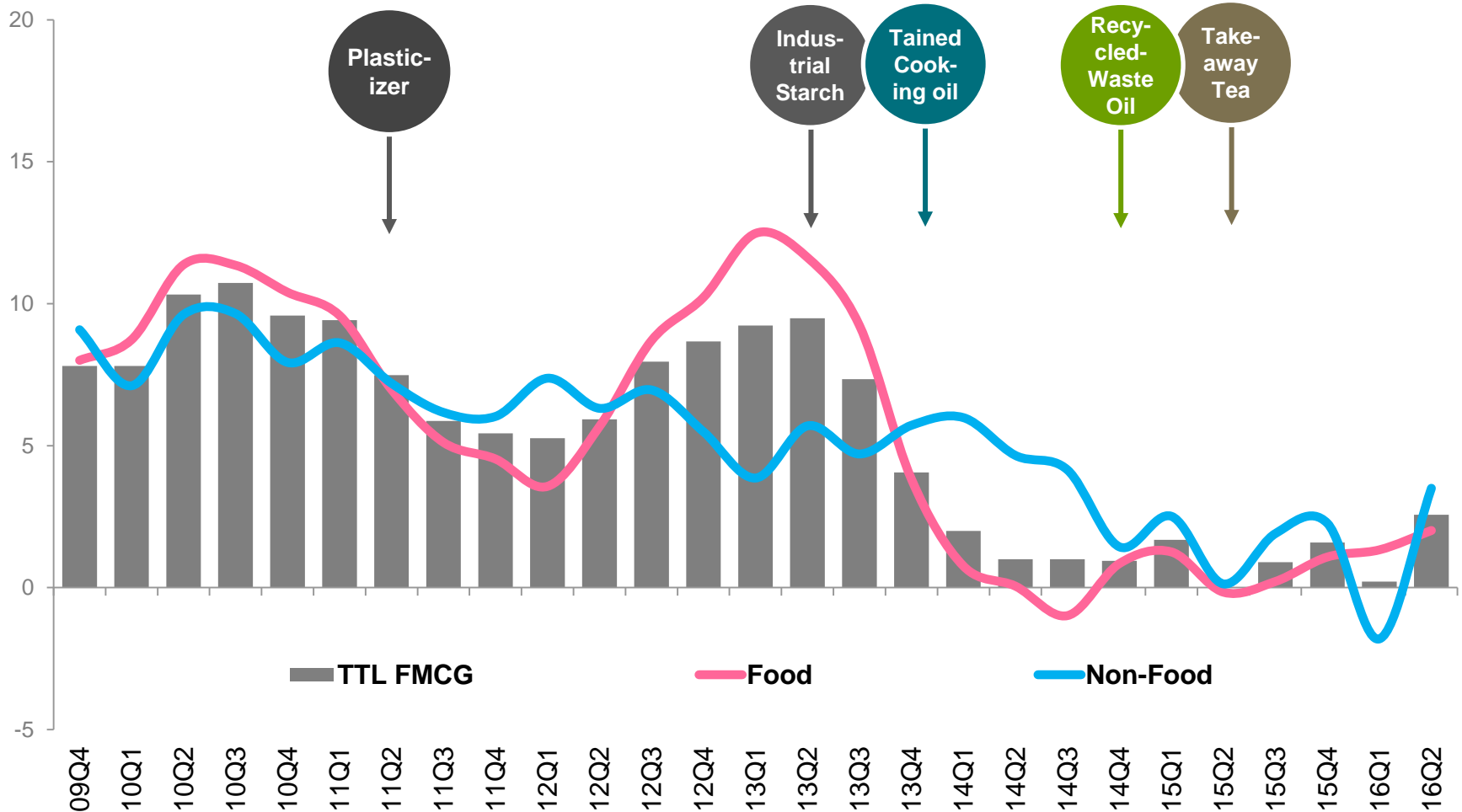
#

- After a year of food safety crisis, the market has been gradually recovered in both food and non-food categories. Health is the most important trend in food category, however, a rebound can be found in those categories that were seriously impacted by the crisis a year ago. Personal care appeared to have better performance among non-food categories, and premium brands sustain the growth of household cleansing products.
- Channel-wise, hyper still in decline trend. PX is doing good in food category. Online channel has experienced a growth in both food and non-food.

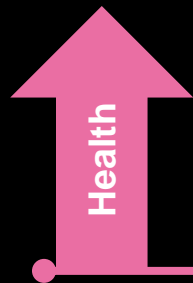
TAIWAN TOTAL FMCG 52 WEEK ROLLING EVOLUTION

A year after food crisis, the market has recovered gradually. Both food and non-food experienced a positive growth.

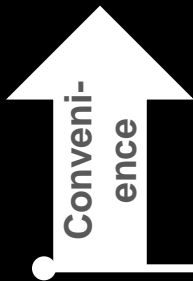
Sales Value GR%



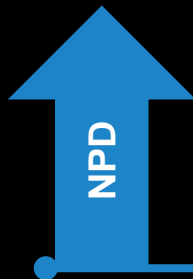
FOOD



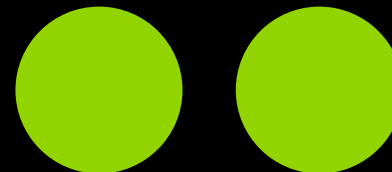
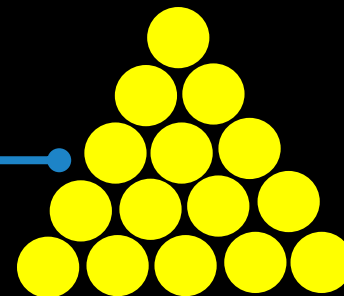
Soy Milk, Cereal, Tea Bag, Ground coffee



Instant Noodle, Frozen Food, Seasoning



Snacks, Cough Drops





Anti-aging and Moisturizing Skincare, Makeup

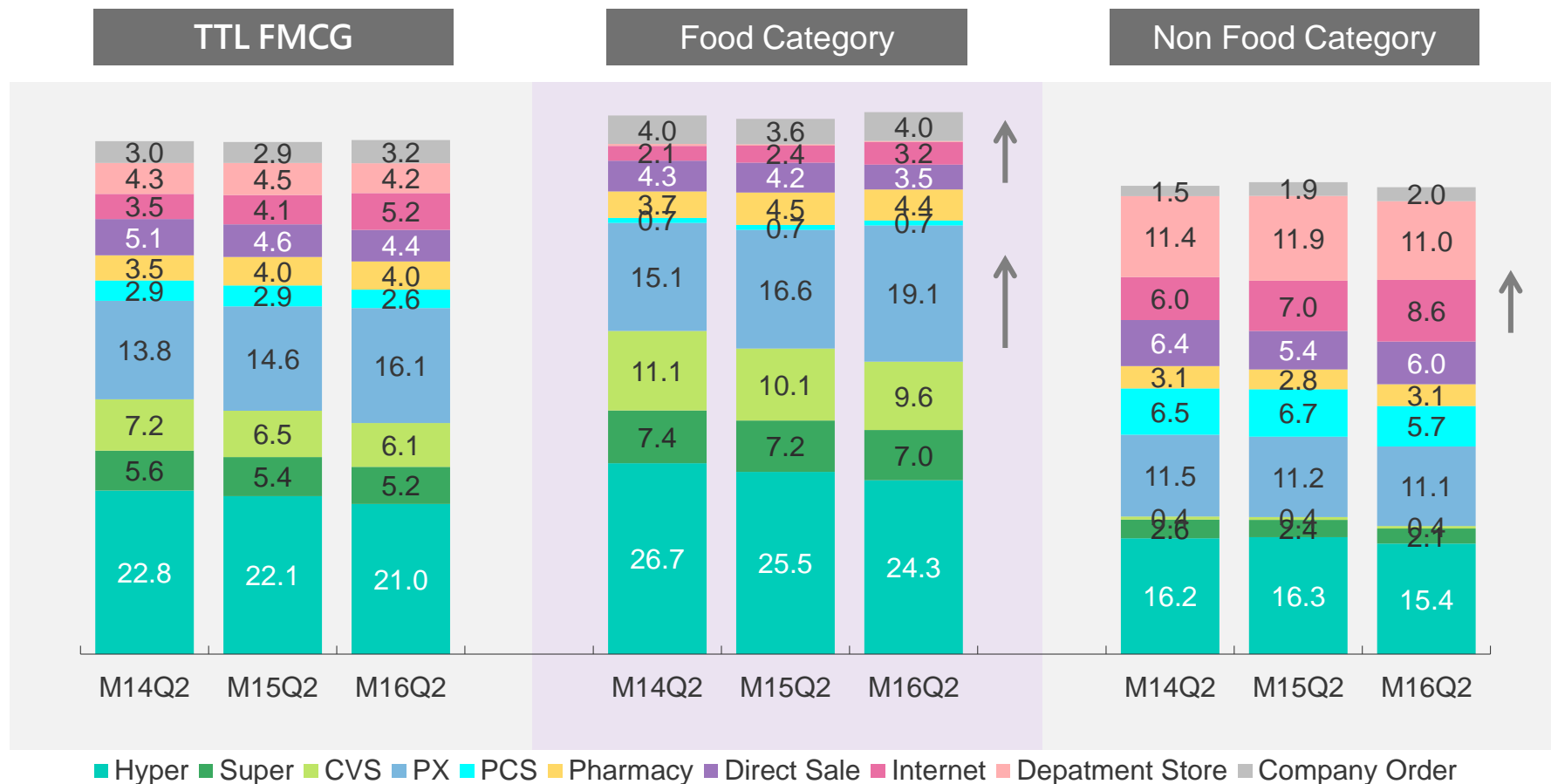


Laundry Detergent, Dish Wash



KEY CHANNEL SNAPSHOT – VALUE %

Hyper still in decline trend. PX shows good performance in fresh milk and packaged food(packet noodle, instant noodle, soy sauce, seasoning). Online grows in both food and non-food categories.



Source: Kantar Worldpanel Taiwan Household Panel

RETAILER HEALTH – TRAFFIC vs. BASKET SIZE

