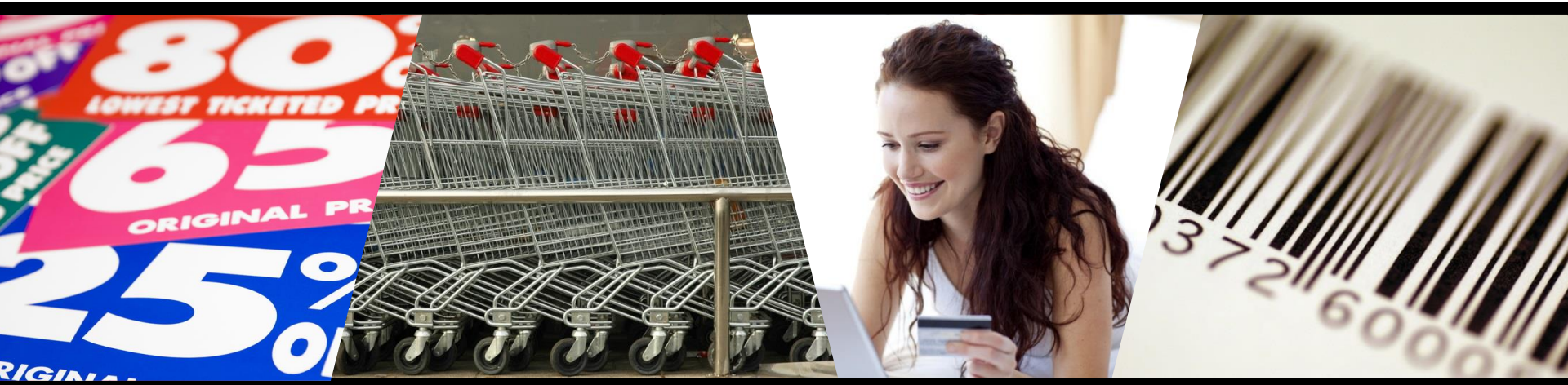
Taiwan FMCG Market Trend

2016 Q3



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2016 Q3 Main Economics Indicators KEY INDEX

Gross Domestic Product (GDP)	Consumer Price Index (CPI)	Consumer Confidence Index (CCI)	Total FMCG market sales value growth VSLY
+2.06%	+1.27%	78.66	+2.7%
2016Q3	YTD16Q3	September, 2016	M16Q3

#

→ The growth of local market demand has driven catering and retail industry to grow, which leads to the rise of demand in FMCG market. Food category has strong performance, and products featuring convenience and health are the current trend in the market. In non-food category, anti-aging beauty care products and makeup products are still the mainstream. Elder-care products like adult diapers and denture cleansing both have stable growth.

→ Channel：PX dairy products has strong growth. E-commerce up-streams in both food and non-food category, with tea/tea bags, ground/ instant coffee, health food, beauty care products out-performing other products.

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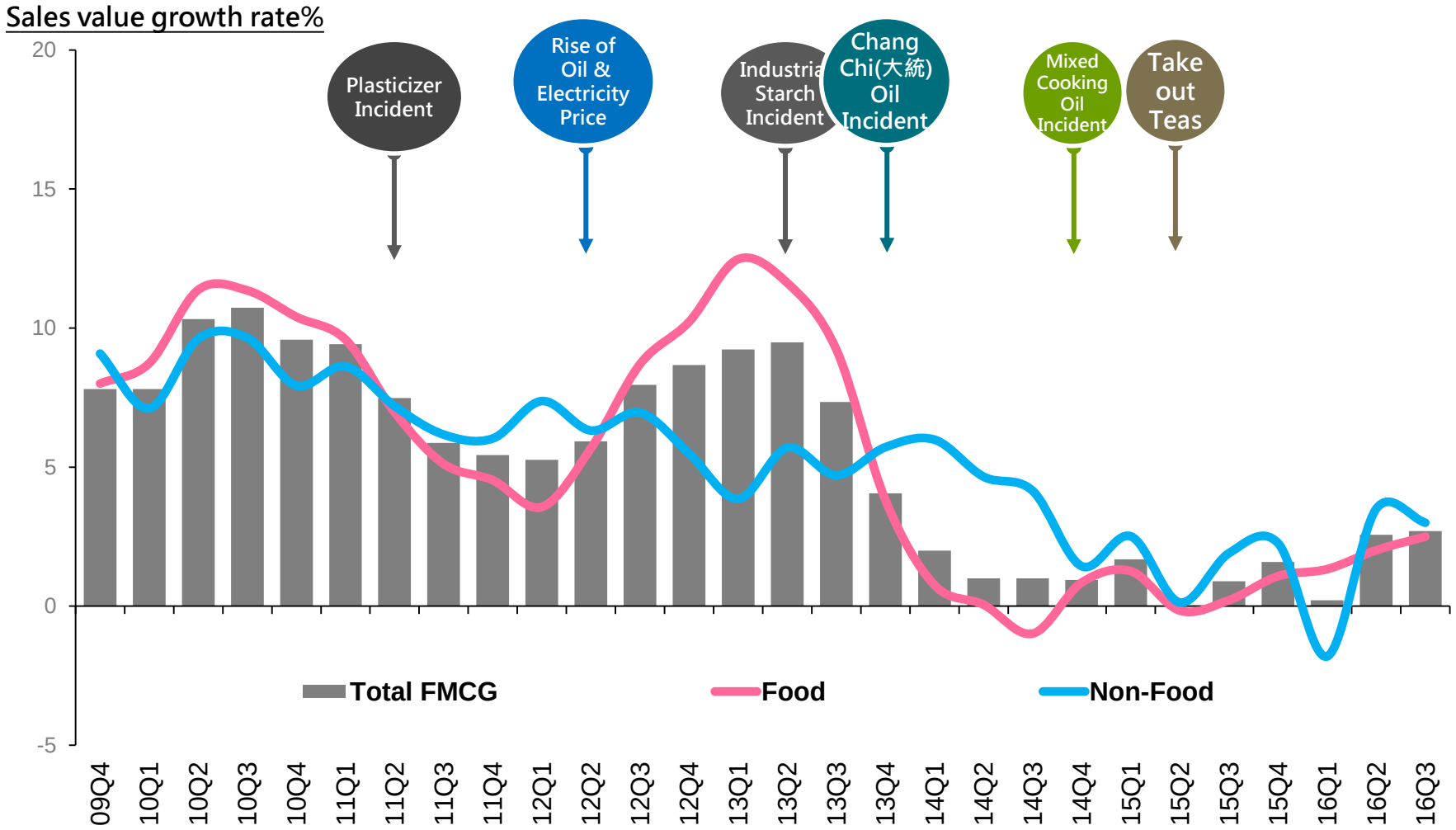
Taiwan Total FMCG Market 52 w/e rolling trend

The expansion of local demand drives market needs, leading to a 3% growth in both food and non-food category.



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FOOD

Health

Health food (chicken essence, edible bird's nest)

Convenience

Instant noodles、fast-cooked noodles、frozen food、snacks

Breakfast nutrition

Cheese、cereals、soy milk

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NON FOOD

beauty

Anti-aging beauty care products、makeup

Elder-care business

Adult diapers、denture cleansing

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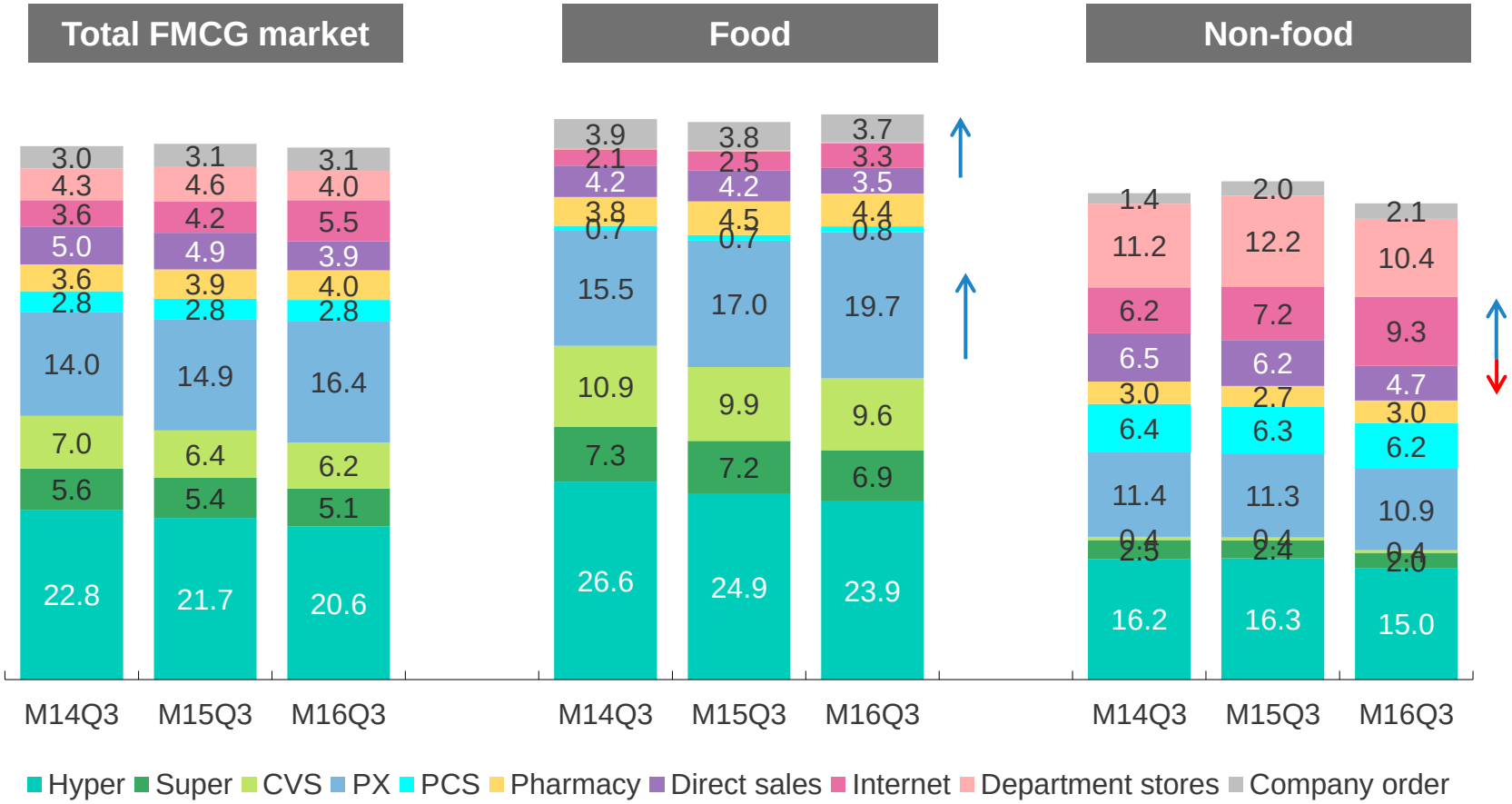
Main channel performance in market– sales value %

PX strong growth in dairy products has brought it's value share to reach 20% in food category.

The importance of both food and non-food categories have soared in e-commerce channel, along with more buyers choosing to purchase online. Tea/tea bags, ground/ instant coffee, health food, beauty care products have out-performed among other products. However, the performance of health food and beauty care products in direct sales are weakened due to the influence of e-commerce rise.



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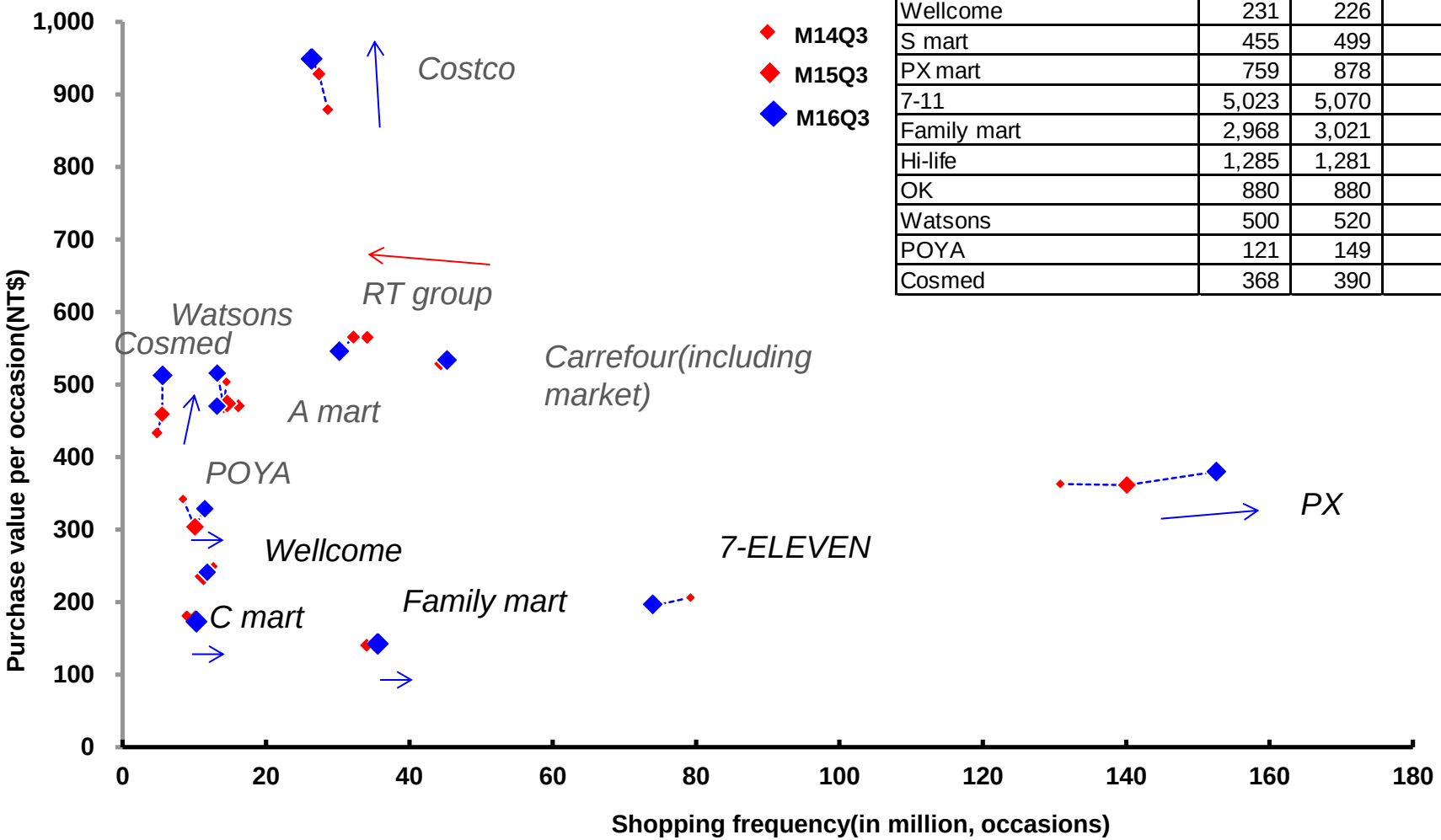
Retailer Trend– Total FMCG market

Shopping frequency v.s. purchase value per occasion



Stores	15Q3	16Q3	growth VSLR
Carrefour (include market)	77	90	17%
RT group	26	24	-8%
A mart	20	19	-5%
Costco	11	12	9%
Wellcome	231	226	-2%
S mart	455	499	10%
PX mart	759	878	16%
7-11	5,023	5,070	1%
Family mart	2,968	3,021	2%
Hi-life	1,285	1,281	0%
OK	880	880	0%
Watsons	500	520	4%
POYA	121	149	23%
Cosmed	368	390	6%

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