KANTAR WORLDPANEL

Consumer Insights

ASIA Q4 2016

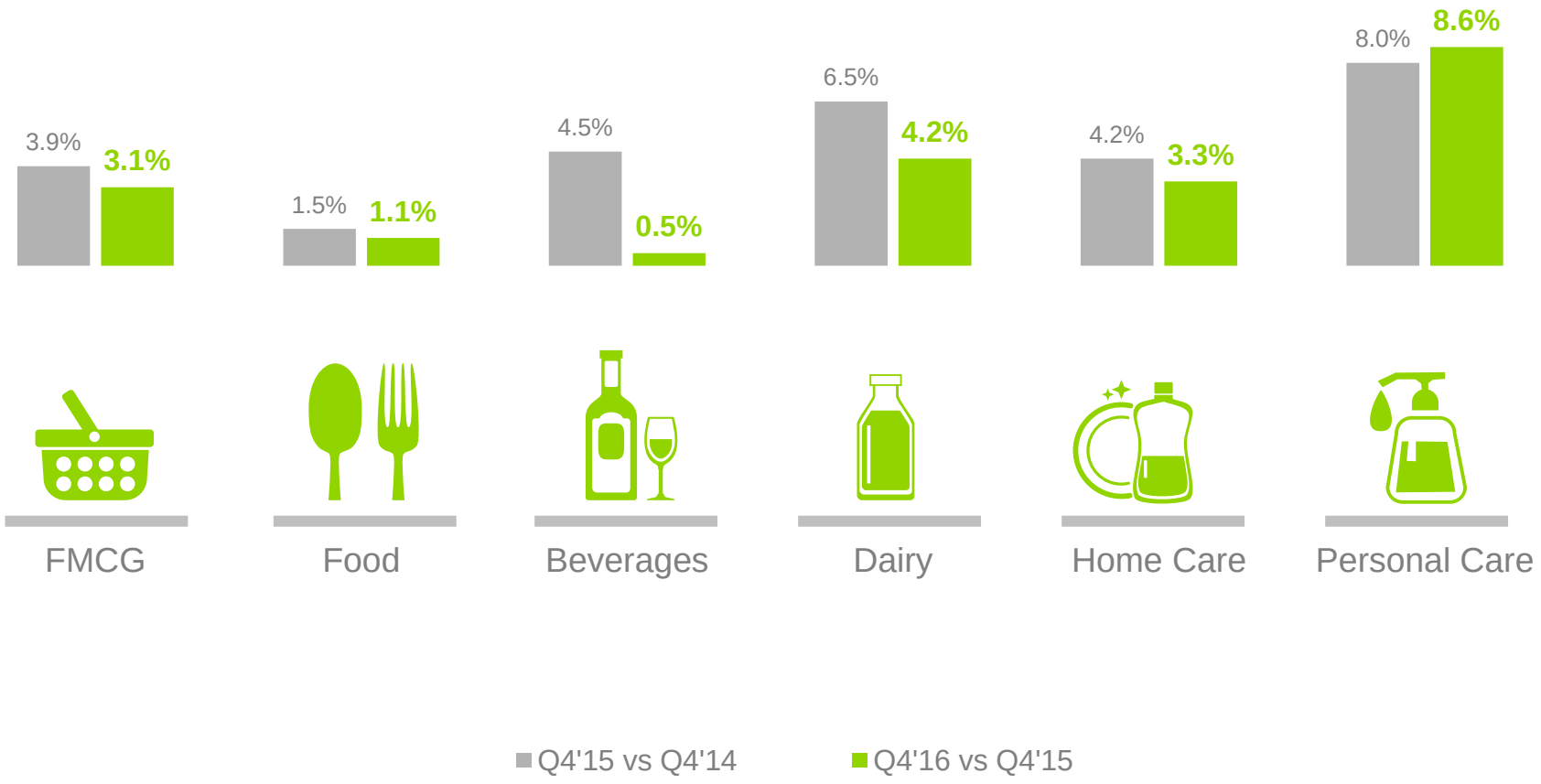
Q4 2016 | SUMMARY ASIA

	Northeast Asia			West Asia		Southeast Asia					
	China	Taiwan	South Korea	India (Urban)	Saudi Arabia	Indonesia	Malaysia	Thailand	Philippines	Vietnam (Urban)	Vietnam (Rural)
FMCG Total	2.9	4.6	0.6	6.7	0.9	5.2	-1.6	1.7	4.8	4.8	2.7
Food	0.2	4.0	-2.3	6.7	4.5	2.7	-0.9	0.8	4.6	5.3	0.8
Beverages	-0.9	5.4	4.2	3.9	0.5	3.0	-1.4	2.1	3.2	5.8	3.0
Dairy Products	5.0	4.9	-0.7	-3.4	-0.3	5.9	-4.0	0.2	9.2	3.7	5.8
Home Care	3.4	1.7	-6.8	7.9	-2.6	7.0	-3.3	3.2	8.3	3.8	-0.5
Personal Care	10.3	5.3	6.4	7.4	0.4	10.7	0.3	2.9	5.7	5.7	4.0

Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

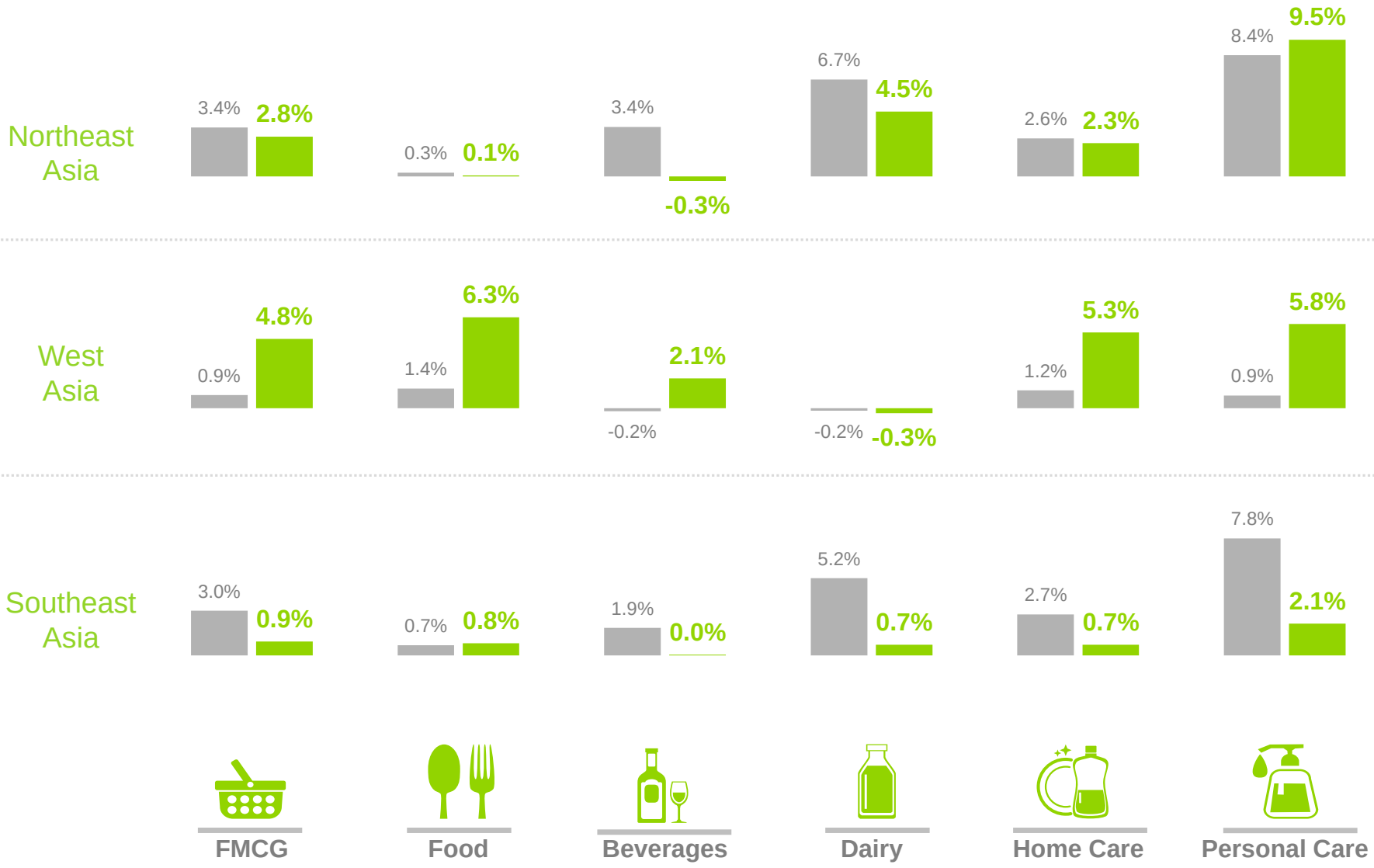
% Value Change FMCG – MAT Q4 2016 vs. Year ago

FMCG GROWTH IN ASIA : YOY



ASIA / MAT – VALUE SPEND GROWTH

FMCG GROWTH IN ASIA : YOY



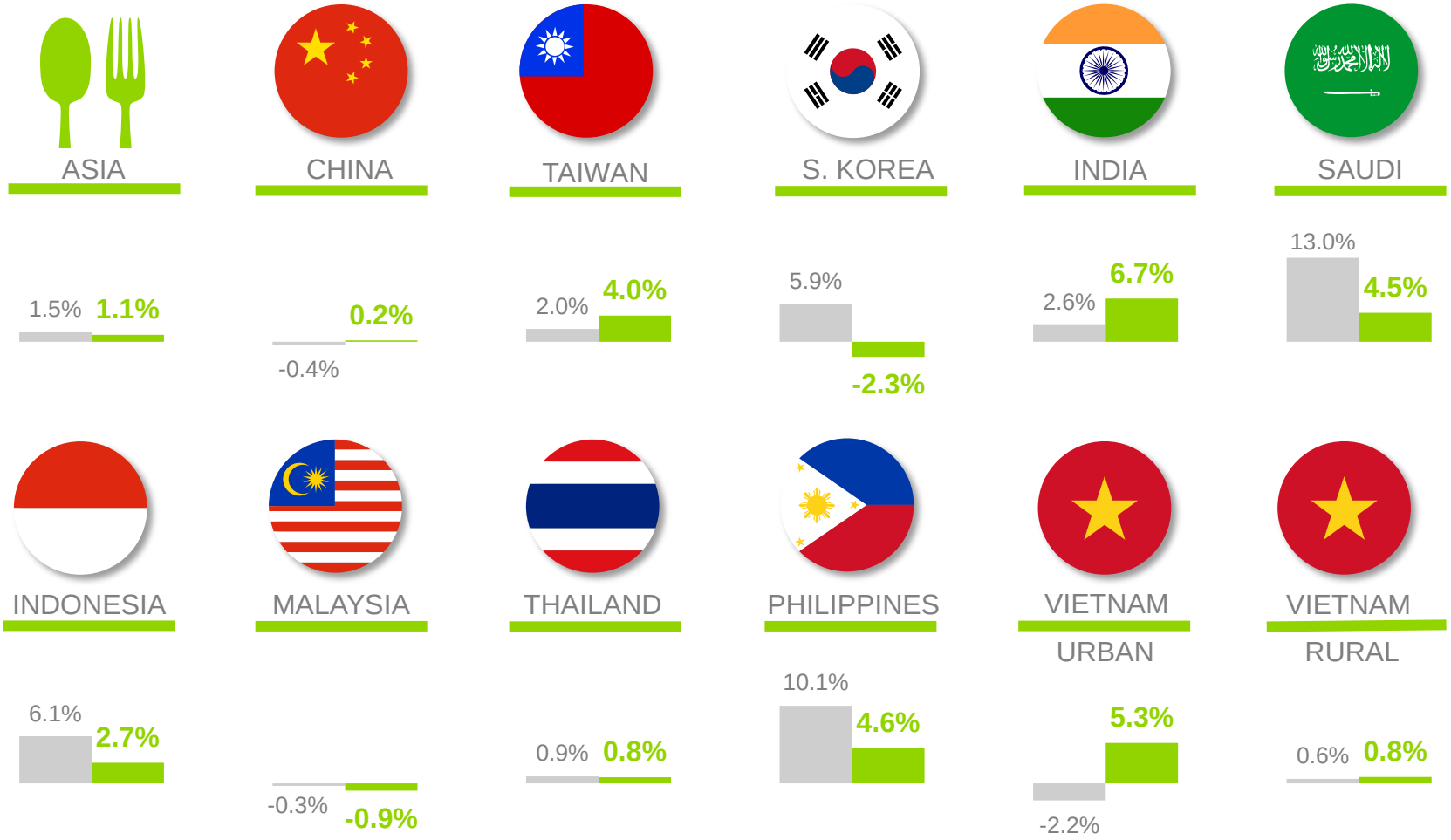
ASIA / MAT – VALUE SPEND GROWTH

FMCG: Overall, consumers adopting a more cautious approach to spending during economic uncertainty

ASIA / MAT Q4 2016 – Value Growth FMCG

Q4'15 v Q4'14 Q4'16 v Q4'15

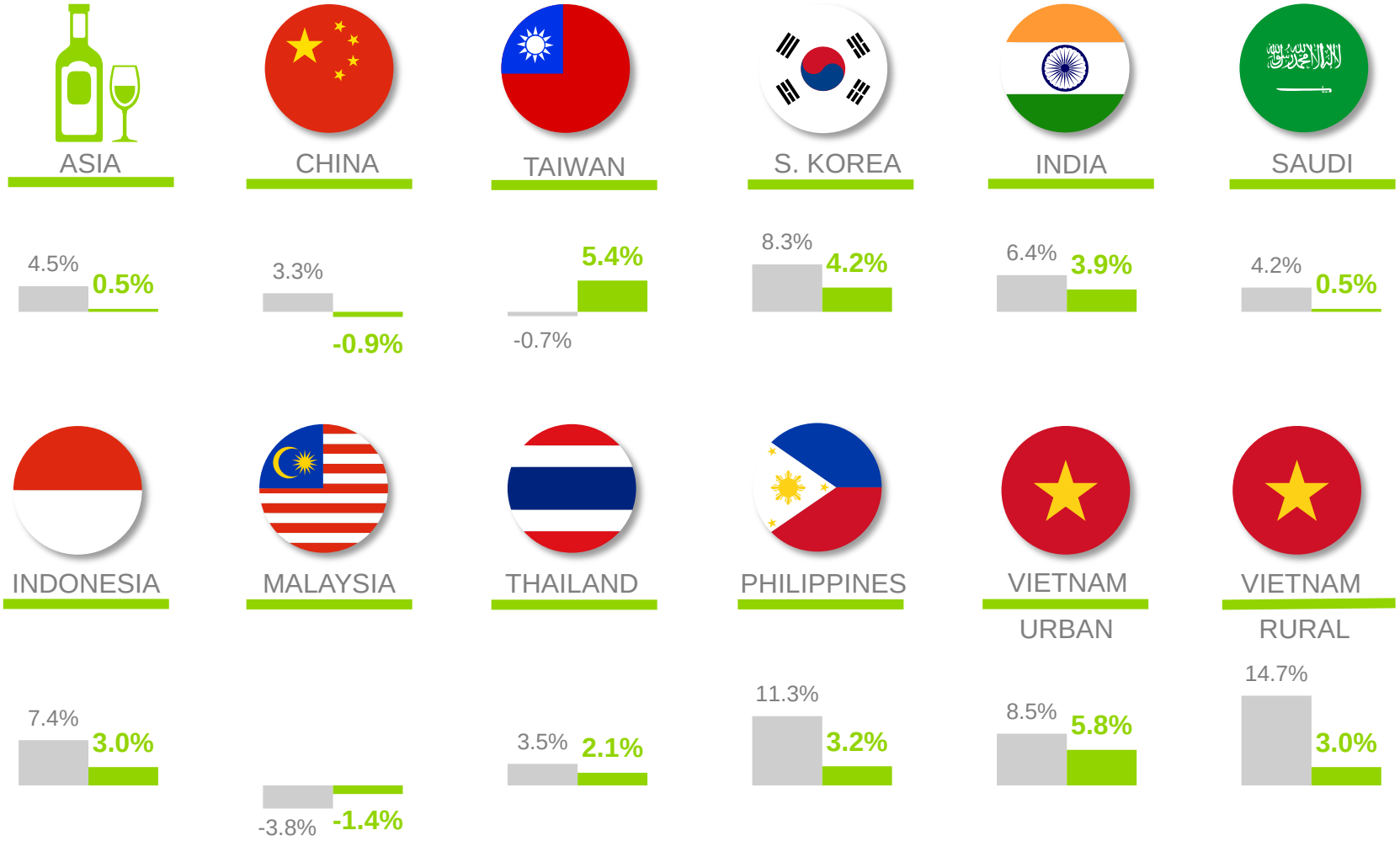
FOOD: Necessities are the main focus, lesser so on indulgences and impulse.



ASIA / MAT Q4 2016 – Value Growth FOOD

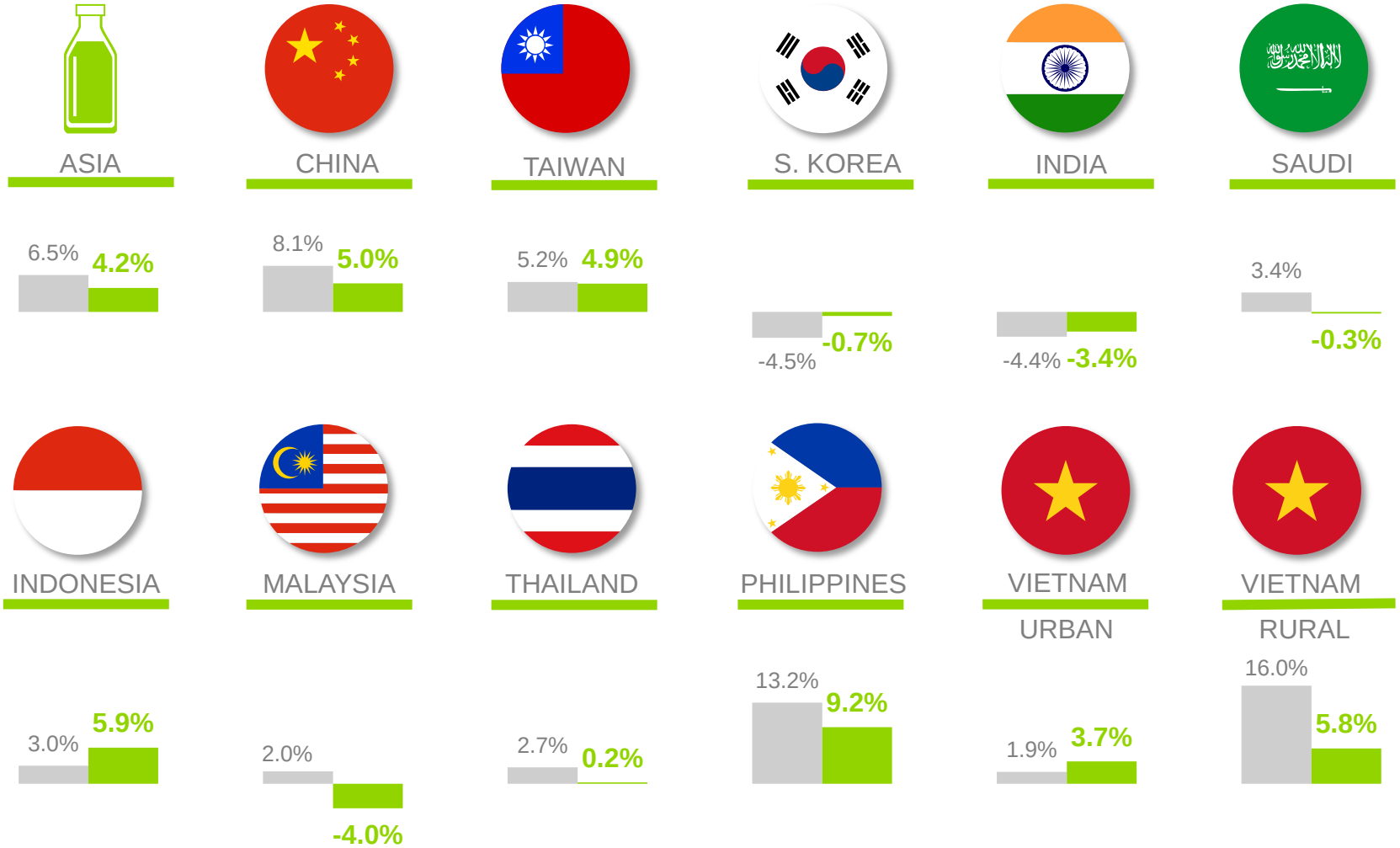
Q4'15 v Q4'14 Q4'16 v Q4'15

BEVERAGES: Category needs excitement, and consumer engagement.



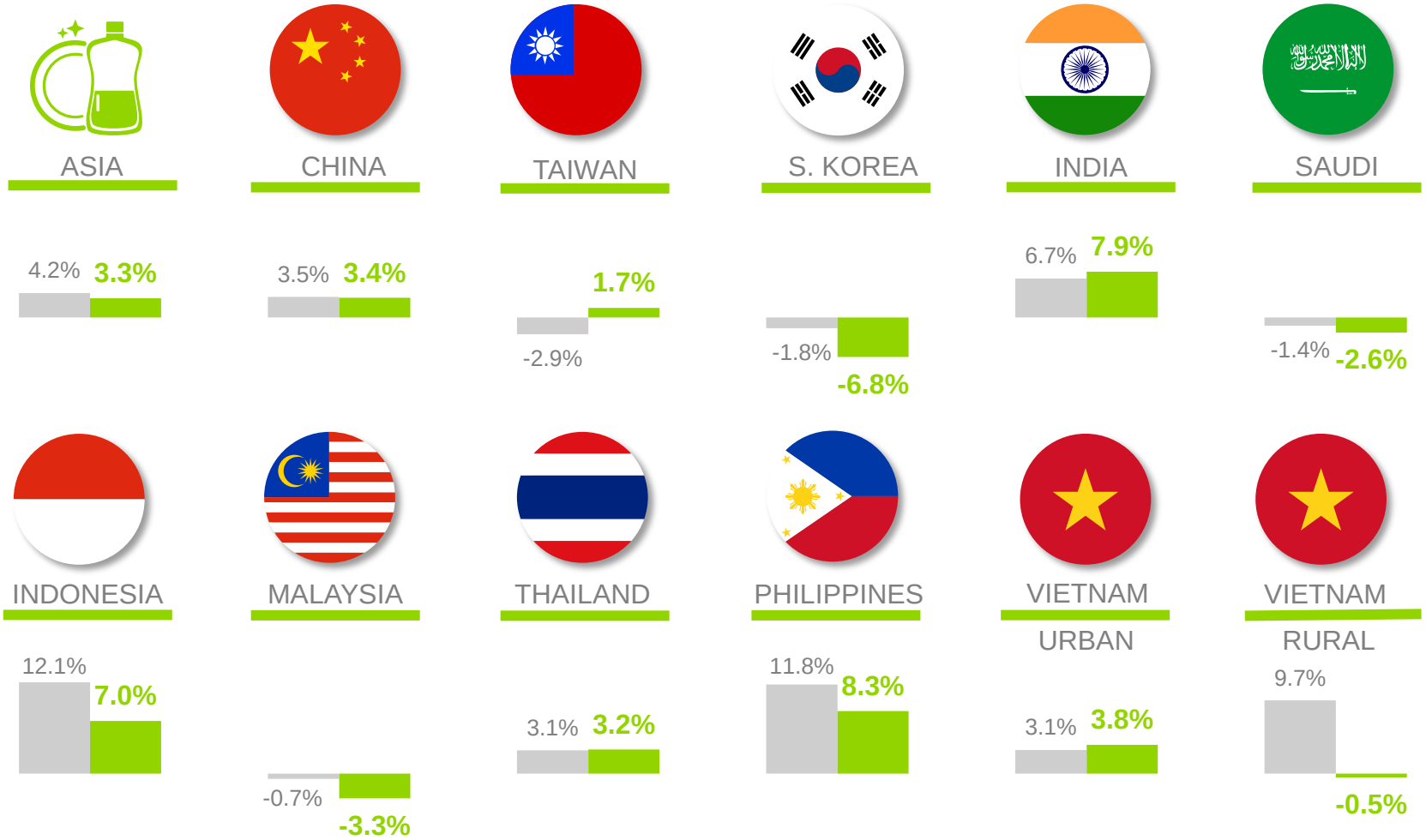
ASIA / MAT Q4 2016 – Value Growth BEVERAGES

DAIRY: Increased awareness towards health main driver for growth.



ASIA / MAT Q4 2016 – Value Growth DAIRY

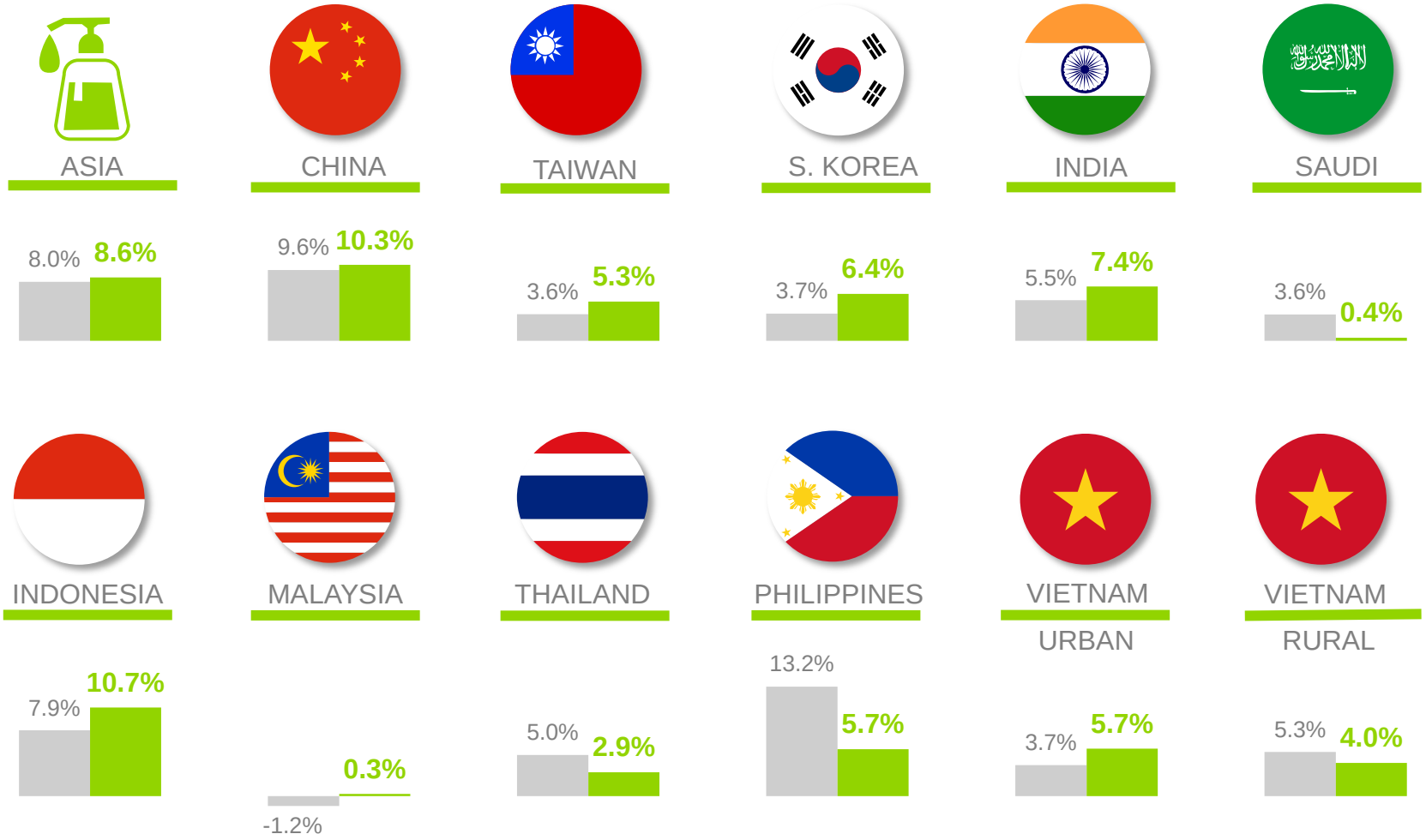
HOME CARE: Consumers stretching usage during economic downturn.



ASIA / MAT Q4 2016 – Value Growth HOME CARE

Q4'15 v Q4'14 ■ Q4'16 v Q4'15

PERSONAL CARE: Remains important to consumers, despite cautionary spending. Are Mens segment making a comeback?



ASIA / MAT Q4 2016 – Value Growth PERSONAL CARE

Q4'15 v Q4'14 Q4'16 v Q4'15

MAT Q4 2016 | SUMMARY ASIA

CHINA

#RecessionScare China's GDP growth was 6.7 percent in 2016 — a three-decade low for the country, with Q4 picking up slightly.

#AllAboutYou Personal care sector remained the key driver, maintaining self image an important factor in China.

#DigitalLifestyle E-commerce was 6% in share in Q4, becoming 4th largest sales channel.

TAIWAN

#FMCG recovery Local market demand rebounded because of growing catering and retail industry-good news to FMCG market.

#Growing EC Both food and non-food soared in e-commerce for attracting more buyers continuously, from personal care, such as facial skincare and haircare, to instant noodles, frozen food.

#Aggressive PX Mart PX mart continued to dominate the market for its food categories, especially dairy products, noodles, and snacks.

S. KOREA

#RecessionVibes Uneasy feeling among South Koreans as they continue to weather the recession.

#HealthMatters Oxy & Febreze yet to rebound from recent scandal, further strengthening the need to take better care of health.

#HealthInnovation The emergence of various types of healthy-concept drinks such as tea drink, yogurt drink, sport drink etc.

INDIA

#NoMoneyNoProblem Despite demonetization affecting the economy, outlook still positive, solid

#Rationalize Value growth slowed down among high income households – rationalizing their expenditure during times of stress, looking to bounce back as everything stabilizes

#Demonitization It has been a tough period for major FMCG sectors, household care, personal care, foods & beverages, looking forward to the recovery

SAUDI

#SalaryCuts With the government salary cuts that happened in Q4, the FMCG spends have dipped in Q4 2016.

#Modernization Shopping occasions continue to migrate to Modern format store, starting to make lesser shopping trips

#Promo! Promotions keeps consumers enticed to continue spending, but basket size growth has stabilized.

MAT Q4 2016 | SUMMARY ASIA

INDONESIA

#Bounceback After a slower 2015, Indonesia economy is started to bounce back in 2016. This year, Indonesia also enjoyed lowest level of inflation since six years.

#PlannedPurchasing Consumers are still cautious of their spending in the FMCG sector by reducing their shopping trips. Also evident is reduction of purchase on impulse categories.

#UpsizingIndication Consumers are also increasing their purchase of large packs, that provides better savings.

MALAYSIA

#LowConfidence Still feeling the pinch on cost of living, spending focused on necessities

#StretchItOut Consumers stretching their usage of non-food products, buying larger packs, taking longer to repurchase.

#Near&Convenient Shoppers moving away from large format and traditional format stores, preferring stores that with better proximity.

THAILAND

#YearofMourning Tourism and entertainment industry to slow down, domestic spending still solid

#Uncertainty Consumers are cautious on spending as new economic activities are postponed, expected recovery soon after

#DigitalFrontier E-commerce on a rise, with huge incremental growth. Still plenty of opportunities to develop.

PHILIPPINES

#HarderBetterFasterStronger PH one of the fastest emerging economies in Asia as GDP grew by 6.6% in Q4 2016 and 6.8% in FY 2016

#WaterWeDoing? Volumes in Bev are switching from canned soft drinks to water and juice this quarter

#TidyHeidy Filipinos are giving more importance to sanitation and hygiene as liquid detergent and toilet bowl cleaner are ranked among the top growing categories.

VIETNAM

#PositiveOutlook Despite 2016 GDP growth lower than expected and lower than the growth in 2015 yet outlook is still positive.

#UrbanFocus Urban Vietnam key to GDP growth while Rural Vietnam facing growth challenges.

#Ministores Ministores are growing in importance in Urban Vietnam by gaining more traffic.

CHINA

Top 5 Categories with Positive Impact – MAT Q4'16 vs Q4'15

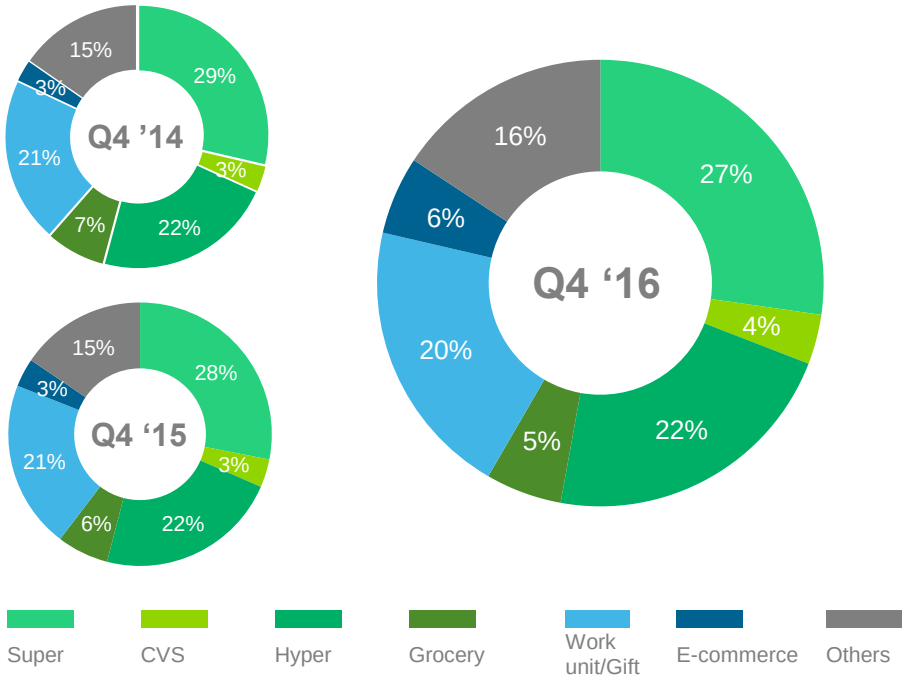
Value	Volume	Penetration
Mouthwash	Kitchen Rolls	Oyster Sauce
Kitchen Rolls	Mouthwash	Packaged Water
Intimate Hygiene	Packaged Water	Kitchen Rolls
Packaged Water	Wet Tissues	Conditioner
Cereals	Oyster Sauce	Toilet Perfume

%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q1'16 VS year ago	MAT Q2'16 VS year ago	MAT Q3'16 VS year ago	MAT Q4'16 VS year ago
Total	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%
Low Income	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%
Mid Income	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth ≤ -0.5%
High Income	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%

Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

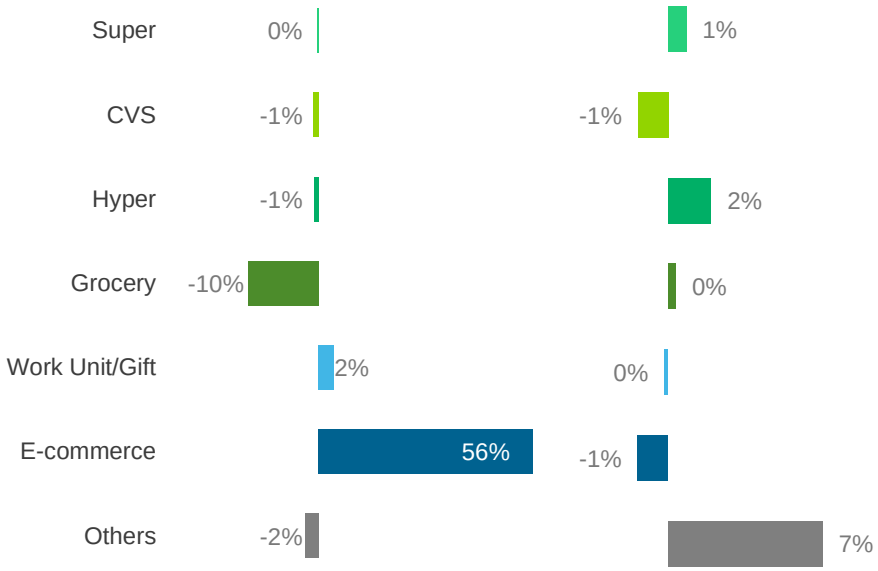
Channel Importance - %Value



Shopping Occasions

Spend/Trip

MAT Q4'16 v Q4'15



TAIWAN

Top 5 Categories with Positive Impact – MAT Q4'16 vs Q4'15

Value	Volume	Penetration
Cologne / Perfume	Cordials	RTE Breakfast Cereal
Bird's Nest	Adult Diapers	Cheese
RTE Breakfast Cereal	Deodorant	Toothbrush
Mouth Rinse	Mouth Rinse	Ice Cream
Adult Diaper	Corn Snacks	Flour Snacks

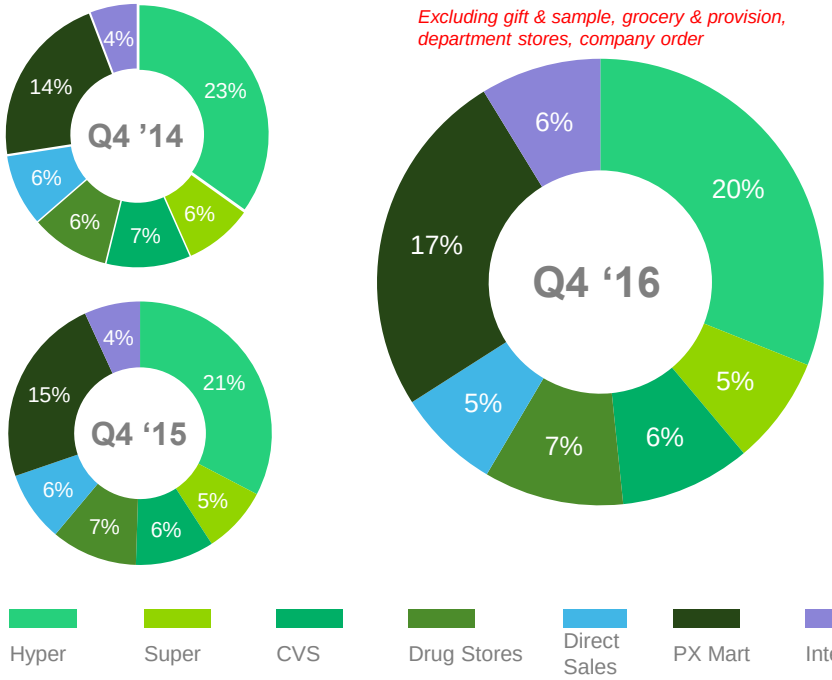
%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q1'16 vs. year ago	MAT Q2'16 vs. year ago	MAT Q3'16 vs. year ago	MAT Q4'16 vs. year ago
Total	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%
Low Income	-0.5% < Growth ≤ 5%	Growth > 5%	Growth > 5%	Growth > 5%
Mid Income	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth ≤ -0.5%
High Income	-0.5% < Growth ≤ 5%	Growth > 5%	Growth > 5%	Growth > 5%

Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

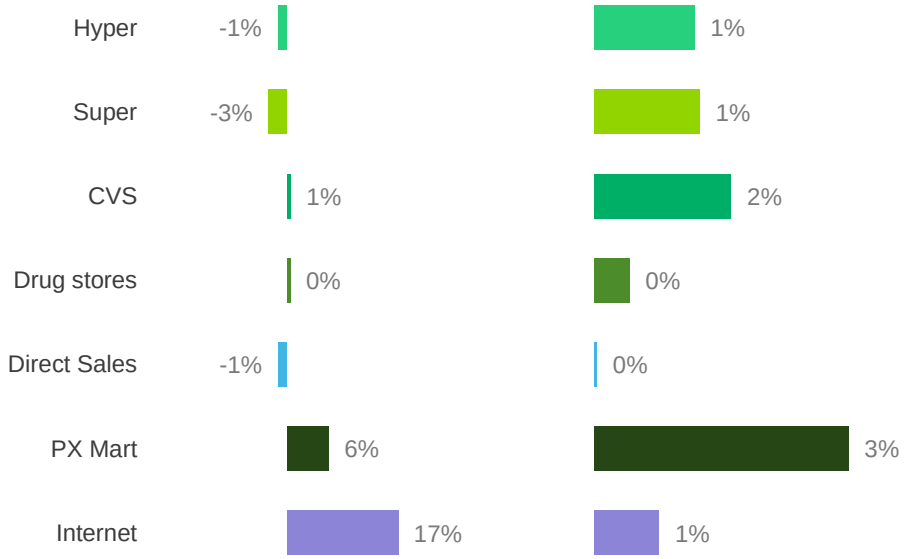
Channel Importance - %Value

Excluding gift & sample, grocery & provision, department stores, company order



Shopping Occasions / Spend/Trip

MAT Q4'16 v Q4'15



KOREA

Top 5 Categories with Positive Impact – MAT Q4'16 vs Q4'15

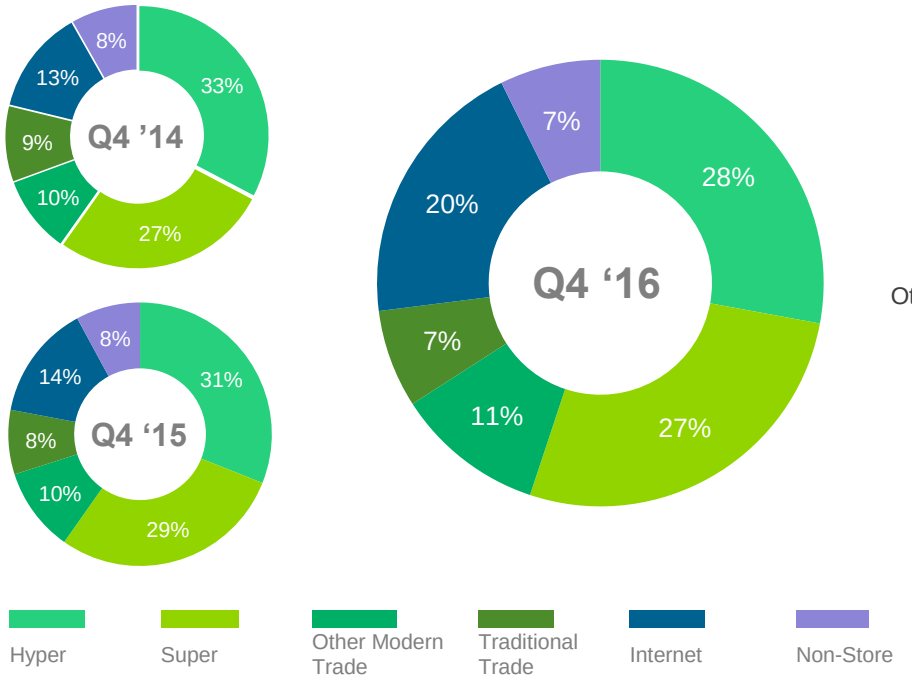
Value	Volume	Penetration
Eyebrow	Facial Pack	Retort
Hair Treatment	Instant Coffee	Facial Pack
Retort	Eyebrow	Lipstick
Facial Pack	Hair Treatment	Body Suncare
Hair Colorant	Hair Colorant	Cream

%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q1'16 VS year ago	MAT Q2'16 VS year ago	MAT Q3'16 VS year ago	MAT Q4'16 VS year ago
Total	Yellow	Yellow	Yellow	Yellow
Low Income	Green	Green	Yellow	Yellow
Mid Income	Yellow	Yellow	Yellow	Yellow
Mid-High Income	Green	Green	Green	Yellow
High Income	Grey	Grey	Grey	Grey

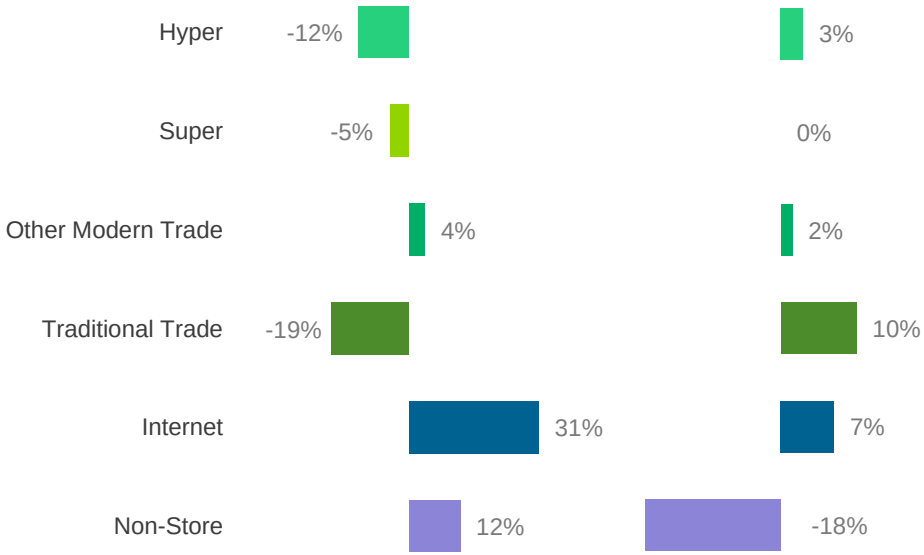
Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

Channel Importance - %Value



Shopping Occasions / Spend/Trip

MAT Q4'16 v Q4'15



INDIA

Top 5 Categories with Positive Impact – MAT Q4'16 vs Q4'15

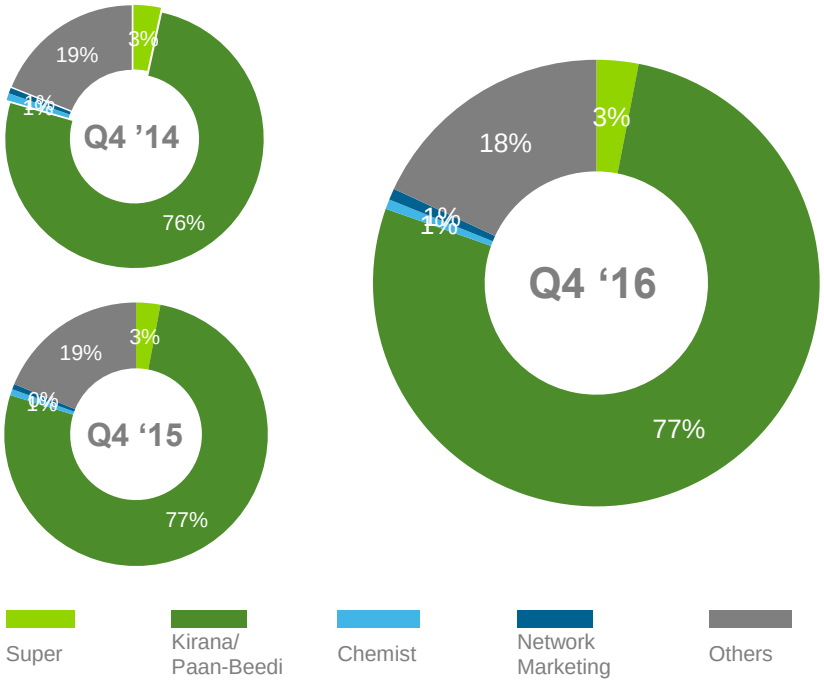
Value	Volume	Penetration
Noodle/ Macaroni	Sauces	Toilet/Bathroom Cleaners
Sauces	Noodle/ Macaroni	Bottled Soft Drink
Floor Cleaner	Floor Cleaner	Floor Cleaner
Toilet/Bathroom Cleaner	Toilet/Bathroom Cleaner	Noodle/ Macaroni
Shampoo	Shaving Blades	Coffee

%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q1'16 VS year ago	MAT Q2'16 VS year ago	MAT Q3'16 VS year ago	MAT Q4'16 VS year ago
Total SEC	Yellow	Green	Green	Green
SEC AB	Yellow	Green	Green	Green
SEC C	Yellow	Green	Green	Green
SEC D/E	Yellow	Green	Green	Green

Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

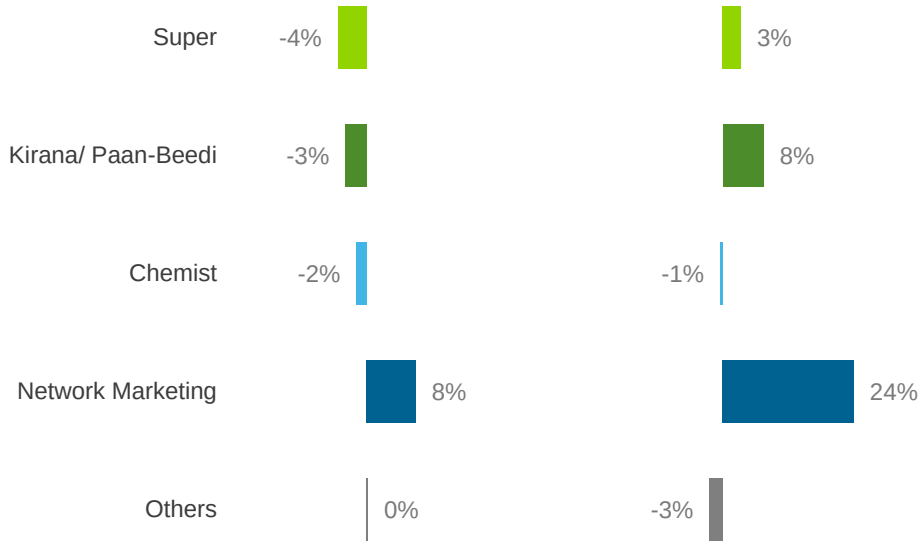
Channel Importance - %Value



Shopping Occasions

Spend/Trip

MAT Q4'16 v Q4'15



SAUDI ARABIA

Top 5 Categories with Positive Impact – MAT Q4'16 vs Q4'15

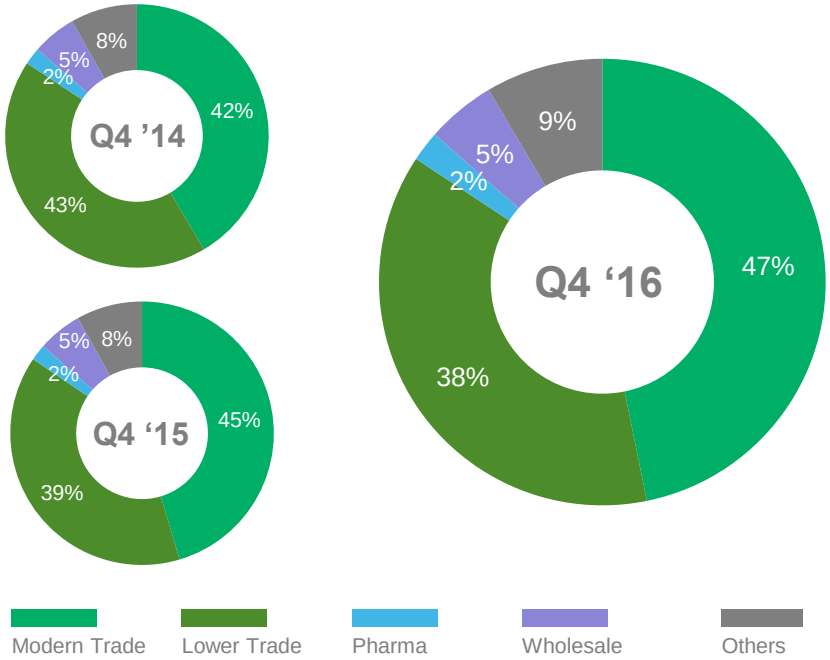
Value	Volume	Penetration
Desserts mixes	Desserts mixes	Spreads
Sliced/toast bread	Body deodorant	Desserts mixes
Spreads	Sliced/toast bread	Body deodorant
Body deodorant	Spreads	Coffee
Bottled water	Evaporated milk	Biscuits

%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q1'16 VS year ago	MAT Q2'16 VS year ago	MAT Q3'16 VS year ago	MAT Q4'16 VS year ago
Total SEC	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%
SEC AB	Growth ≤ -0.5%	Growth ≤ -0.5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%
SEC C	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%
SEC D	Growth > 5%	Growth > 5%	Growth > 5%	-0.5% < Growth ≤ 5%

Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

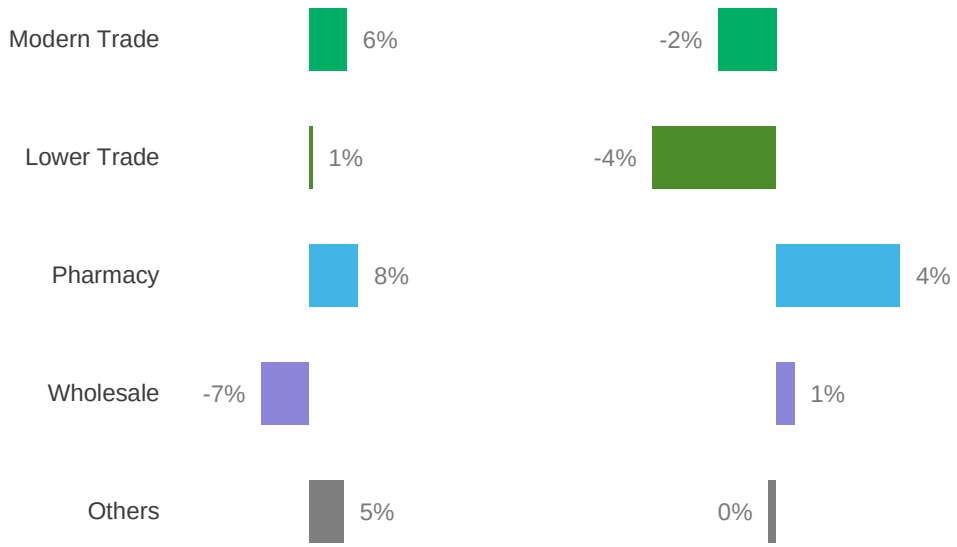
Channel Importance - %Value



Shopping Occasions

Spend/Trip

MAT Q4'16 v Q4'15



INDONESIA

Top 5 Categories with Positive Impact – MAT Q4'16 vs Q4'15

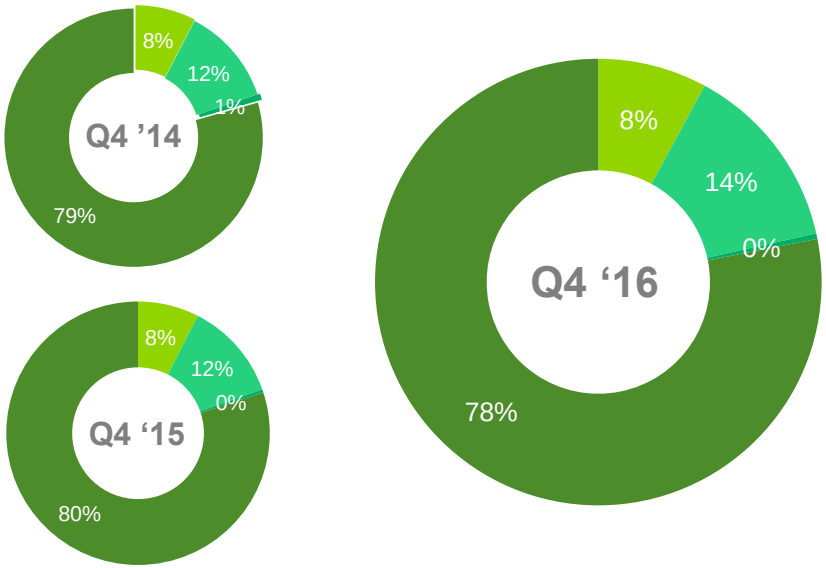
Value	Volume (Kg/L)	Penetration
Clothes Stain Cleaner	Clothes Stain Cleaner	Body Deodorant
Yoghurt Drink	Hair Treatment	Facial Moisturizer
Breakfast Cereal	Yoghurt Drink	Shower Gel
Baby Shower Gel	Eye Cosmetic	Clothes Stain Cleaner
Baby Body Care	Baby Shower Gel	Baby Body Care

%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q1'1 VS year ago	MAT Q2'16 VS year ago	MAT Q3'16 VS year ago	MAT Q4'16 VS year ago
Total	Growth > 5%	Growth > 5%	-0.5% < Growth ≤ 5%	Growth > 5%
Low Income	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%
Mid Income	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%
High Income	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%

Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

Channel Importance - %Value

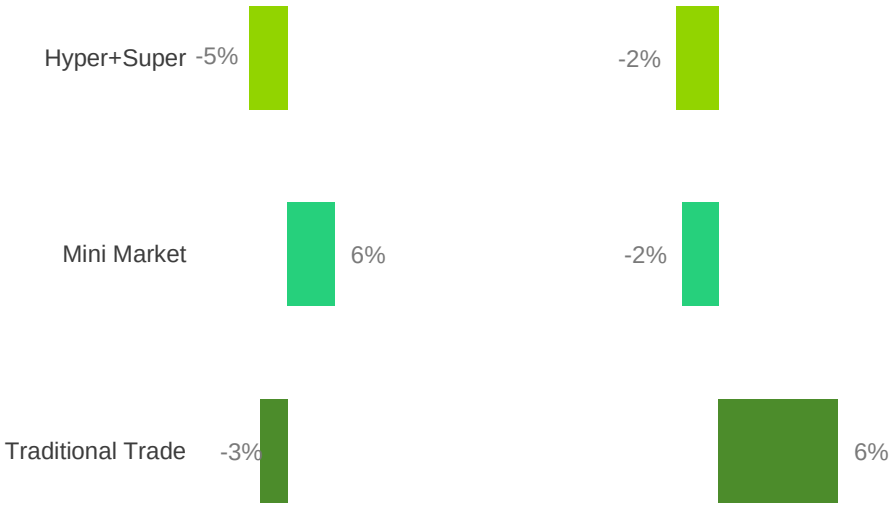


Hyper + Super | Mini Market | Other Modern Trade | Traditional Trade | Others

Shopping Occasions

Spend/Trip

MAT Q4'16 v Q4'15



MALAYSIA

Top 5 Categories with Positive Impact – MAT Q4'16 vs Q4'15

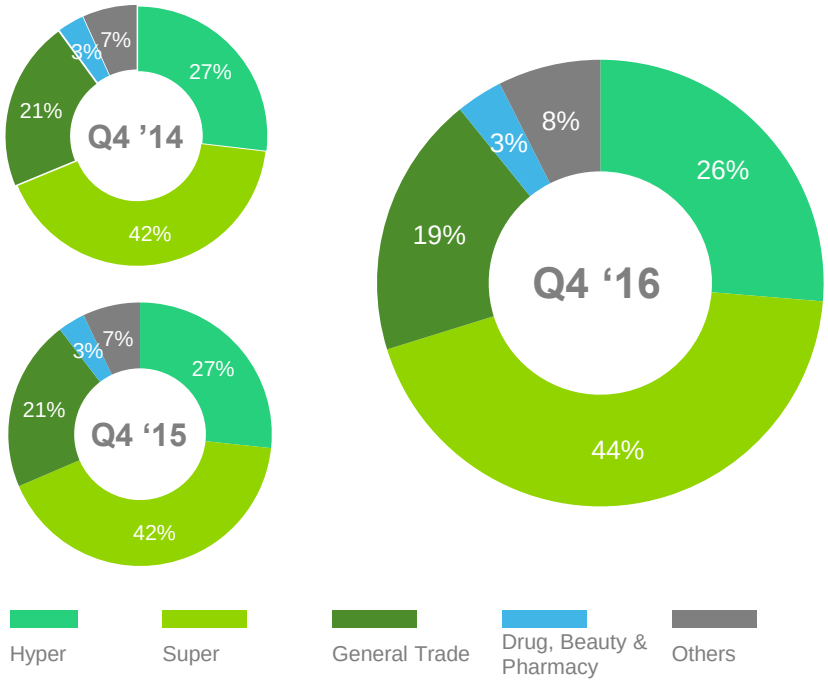
Value	Volume	Penetration
RTD Coffee	RTD Coffee	Choc/Nut Spread
Dusting Powder	Foundation	RTD Coffee
Foundation	Drinking Water	Foundation
Disposable Razors	Disposable Razors	Facial Cleanser
Choc/Nut Spread	Choc/Nut Spread	Bouillon

%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q1'16 VS year ago	MAT Q2'16 VS year ago	MAT Q3'16 VS year ago	MAT Q4'16 VS year ago
Total	Yellow	Grey	Yellow	Yellow
Low Income	Yellow	Grey	Yellow	Yellow
Mid Income	Yellow	Grey	Yellow	Yellow
High Income	Yellow	Yellow	Yellow	Grey

Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

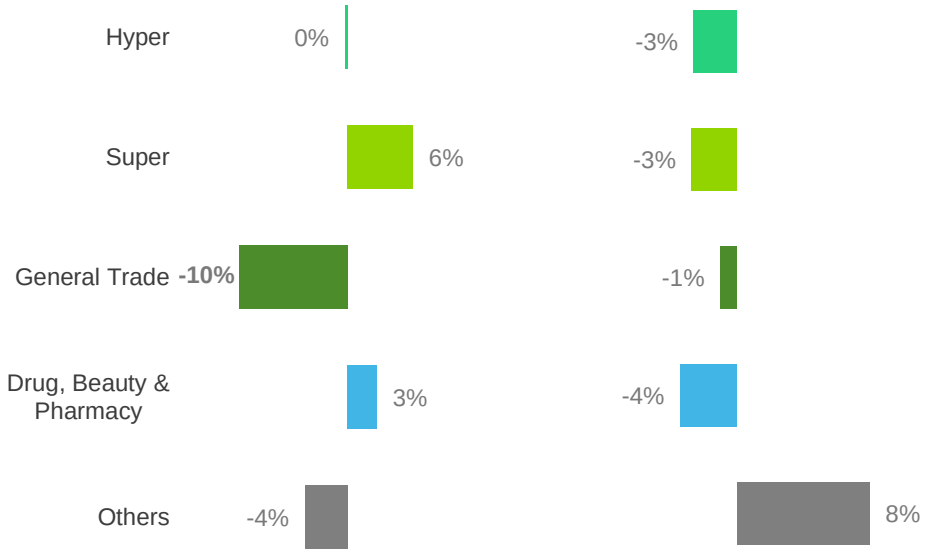
Channel Importance - %Value



Shopping Occasions

Spend/Trip

MAT Q4'16 v Q4'15



THAILAND

Top 5 Categories with Positive Impact – MAT Q4'16 vs Q4'15

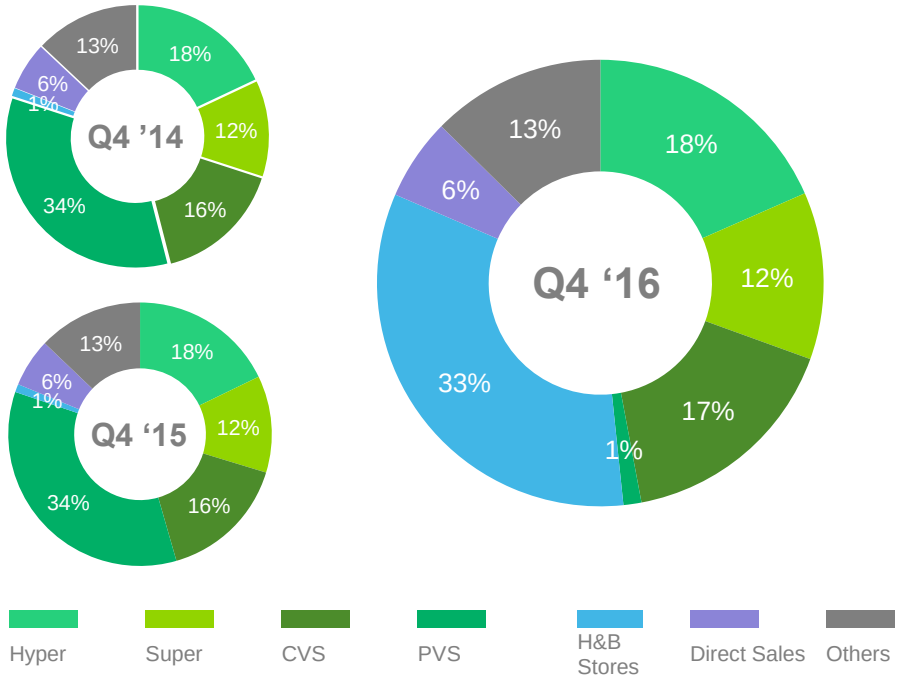
Value	Volume	Penetration
Mask	Mask	Facial Tissue
Facial Tissue	Facial Tissue	Toilet Tissue
Canned Fruit	Canned Fruit	Bottle Water
Dressings	Bottle Water	RTD TFD
Bottle Water	Jam	Rice

%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q1'16 VS year ago	MAT Q2'16 VS year ago	MAT Q3'16 VS year ago	MAT Q4'16 VS year ago
Total	Yellow	Yellow	Yellow	Yellow
Low Income	Yellow	Yellow	Yellow	Yellow
Mid Income	Yellow	Yellow	Yellow	Yellow
High Income	Yellow	Yellow	Green	Green

Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

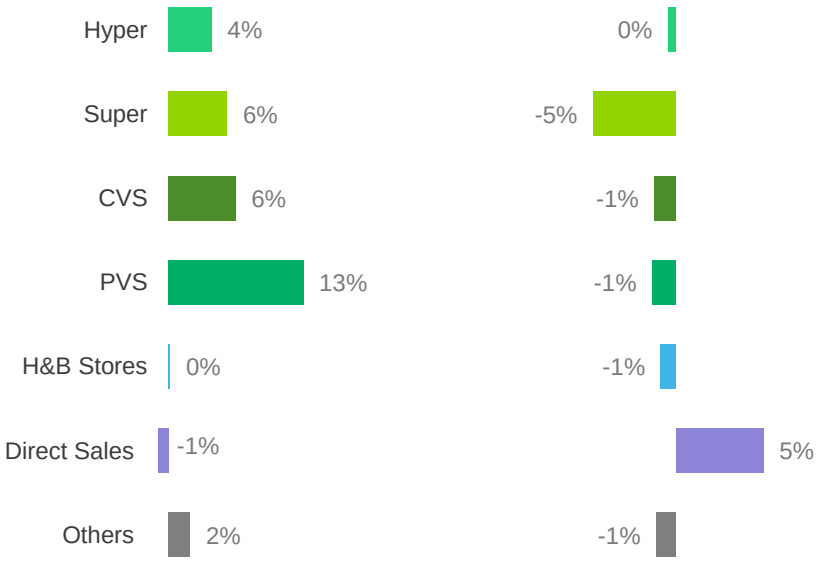
Channel Importance - %Value



Shopping Occasions

Spend/Trip

MAT Q4'16 v Q4'15



PHILIPPINES

Top 5 Categories with Positive Impact – MAT Q4'16 vs Q4'15

Value	Volume	Penetration
Liquid Detergent	Hair Colorant	Liquid Detergent
RTD Coffee	Liquid Detergent	RTD Coffee
Oyster Sauce	RTD Coffee	Instant Cereal Bev.
Instant Pasta	Liquid Soap	Toilet Bowl Cleaner
Toilet Bowl Cleaner	Oyster Sauce	Pet Food

%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q1'16 VS year ago	MAT Q2'16 VS year ago	MAT Q3'16 VS year ago	MAT Q4'16 VS year ago
Total	Growth > 5%	Growth > 5%	Growth > 5%	-0.5% < Growth ≤ 5%
Low Income	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%
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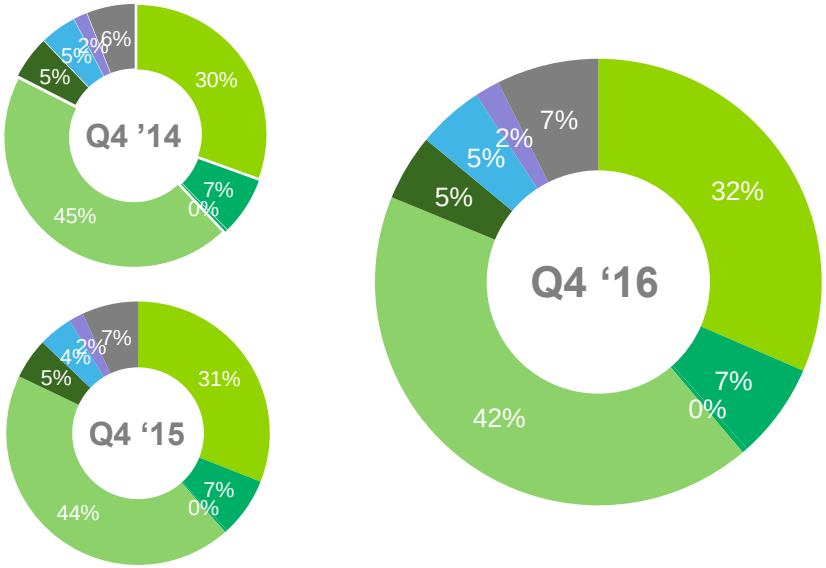
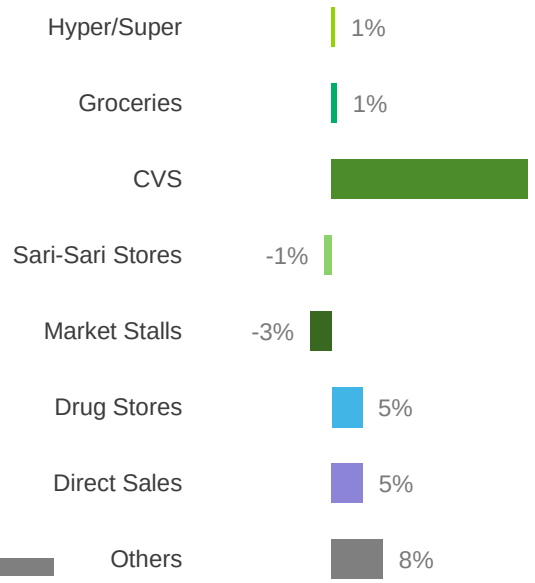
Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

Channel Importance - %Value



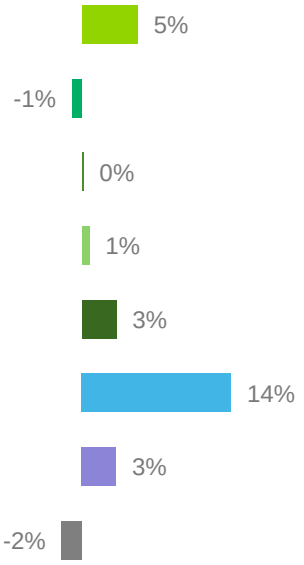
Hyper/ Super | Groceries | CVS | Sari-Sari Stores | Market Stalls | Drug Stores | Direct Sales | Others

Shopping Occasions



Spend/Trip

MAT Q4'16 v Q4'15



VIETNAM URBAN

Top 5 Categories with Positive Impact – MAT Q4'16 vs Q4'15

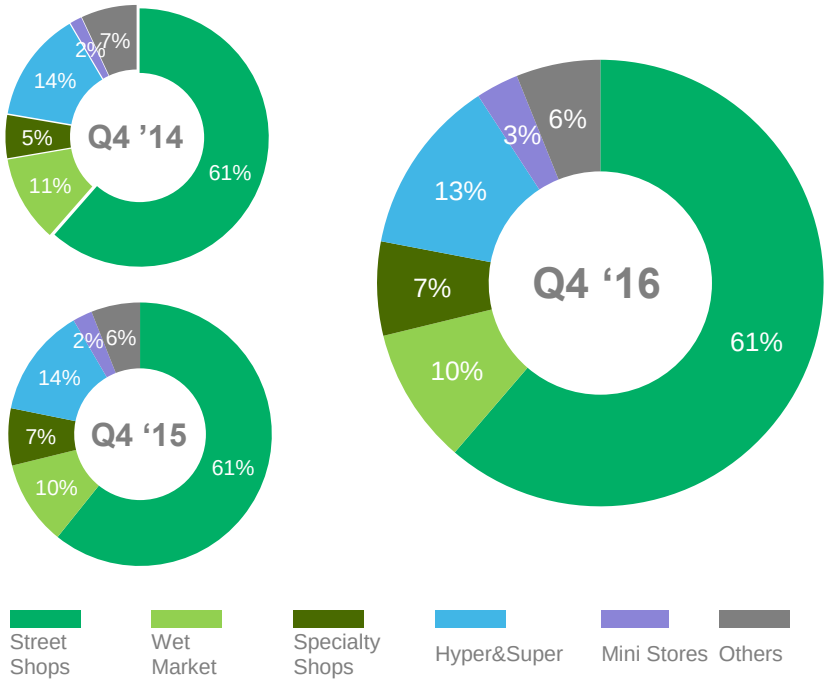
Value	Volume	Penetration
RTD Infant Milk	RTD Infant Milk	Ketchup/Tomato Sauce
Sun Protection	Sun Protection	Liquid Detergent
Instant Tea	Instant Tea	Biscuits
Hair Colorant	Ketchup/Tomato Sauce	Drinking Yogurt
Adult Milk Powder	Hand Washing	Chili Sauce

%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q1'16 VS year ago	MAT Q2'16 VS year ago	MAT Q3'16 VS year ago	MAT Q4'16 VS year ago
Total	Growth ≤ -0.5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%
Low Income	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth ≤ -0.5%
Mid Income	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth ≤ -0.5%
Mid-High Income	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%
High Income	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%

Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

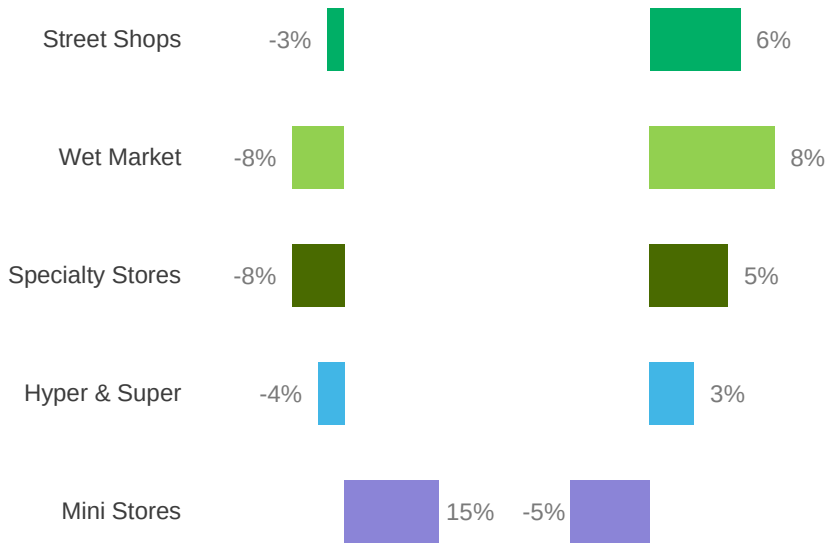
Channel Importance - %Value



Shopping Occasions

Spend/Trip

MAT Q4'16 v Q4'15



VIETNAM RURAL

Top 5 Categories with Positive Impact – MAT Q4'16 vs Q4'15

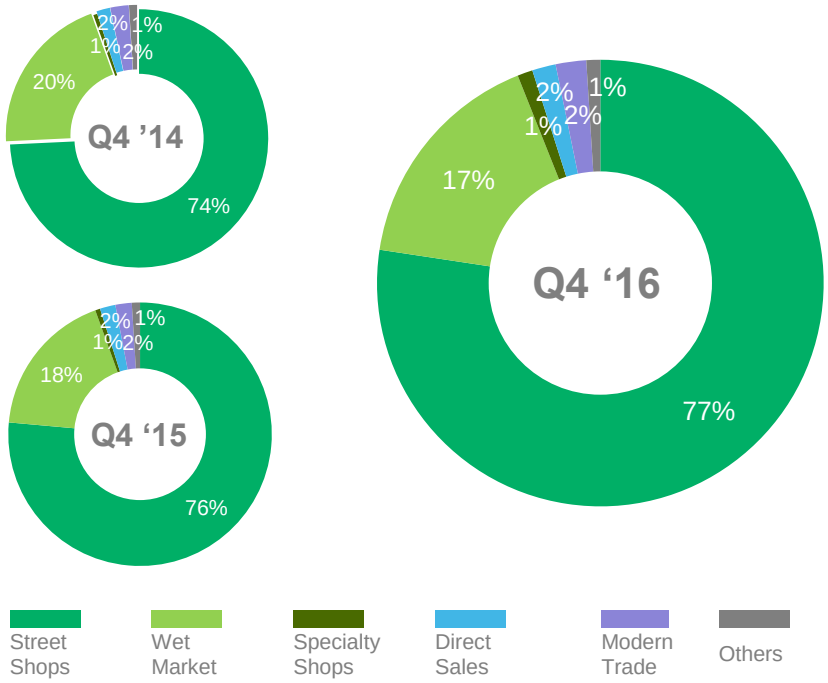
Value	Volume	Penetration
RTD Infant Milk	RTD Infant Milk	Biscuits
Canned Fish	Canned Fish	Liquid Detergent
Tonic Food Drink	Tonic Food Drink	RTD Infant Milk
Drinking Yogurt	Drinking Yogurt	Sweetened Condensed
Biscuits	Liquid Detergent	Drinking Yogurt

%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q1'16 VS year ago	MAT Q2'16 VS year ago	MAT Q3'16 VS year ago	MAT Q4'16 VS year ago
Total	Growth > 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%
Low Income	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth ≤ -0.5%
Mid Income	-0.5% < Growth ≤ 5%	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth ≤ -0.5%
Mid-High Income	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%
High Income	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%

Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

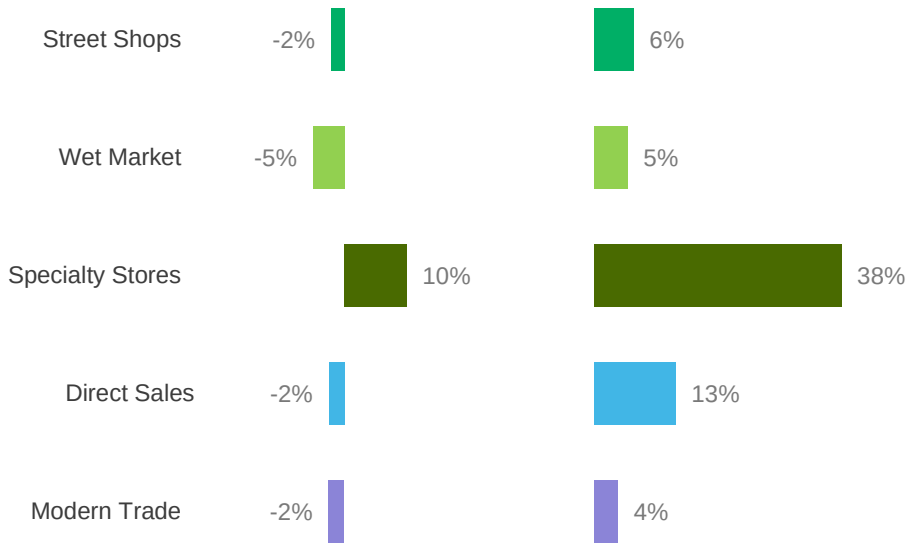
Channel Importance - %Value



Shopping Occasions

Spend/Trip

MAT Q4'16 v Q4'15



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Thank you

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