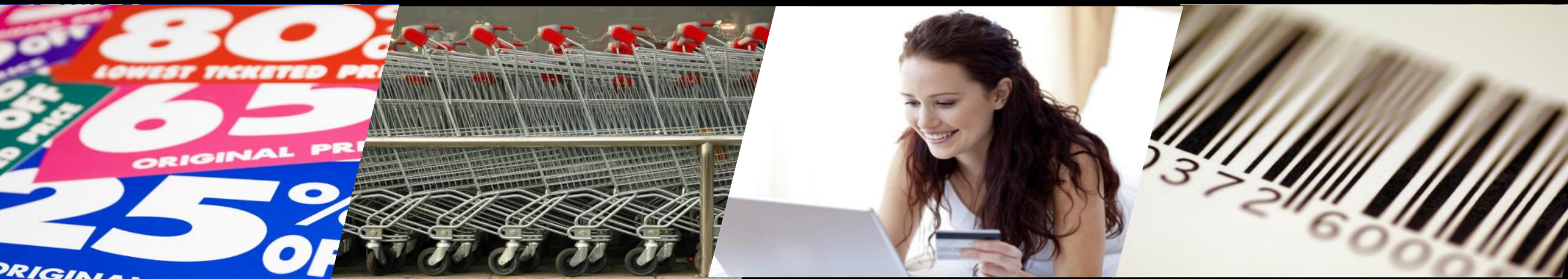
KANTAR WORLDPANEL

Taiwan FMCG Market Trend

2017 Q1



2016 Q1 Main Economics Indicators key index

Gross Domestic Product (GDP)	Consumer Price Index (CPI)	Unemployment rate	Total FMCG market sales value growth VSLY
+2.60%	+0.78%	3.78%	+6.3%
2017Q1	YTD2017Q1	2017 March	MAT2017Q1

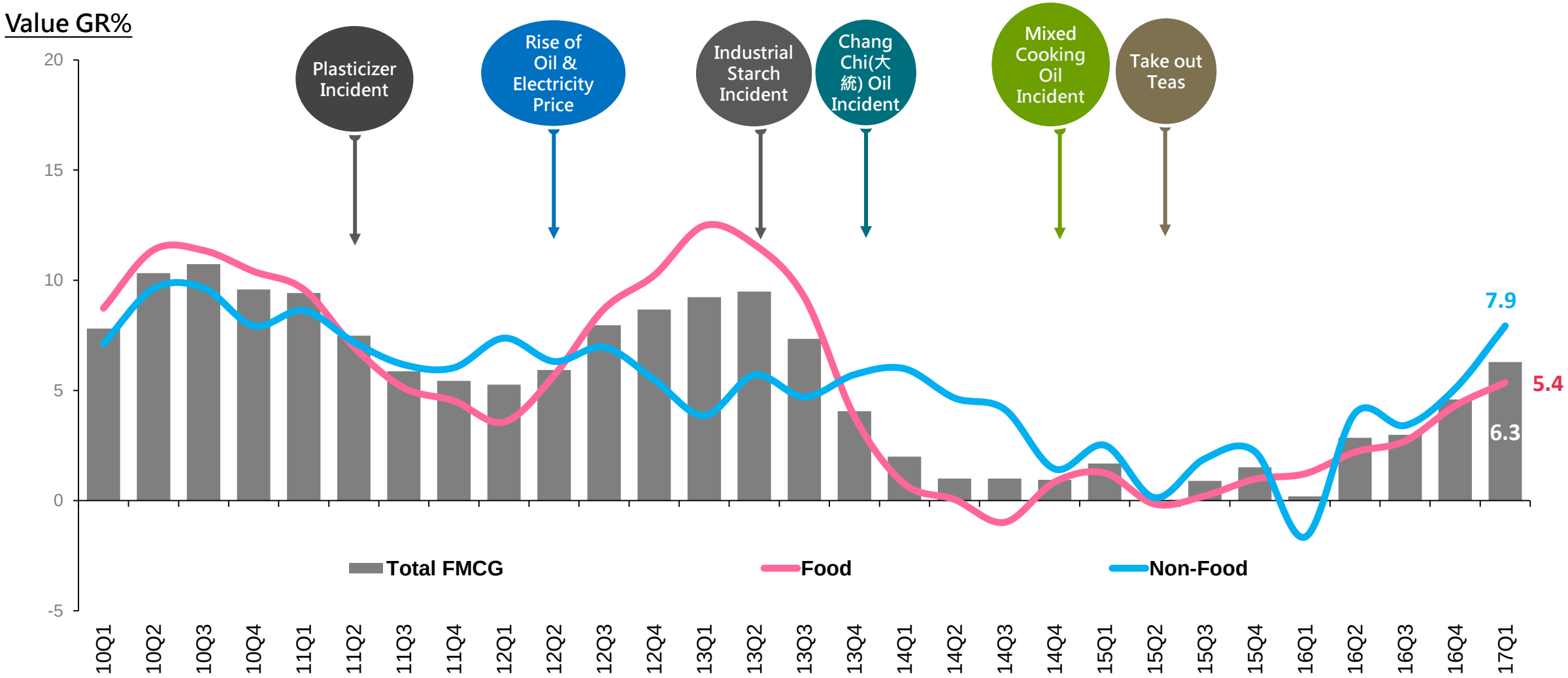
① Taiwan's GDP has grown continuously for four quarters, which is supported by the increasing demand of both export and service consumption. Focusing on the FMCG market, overall, it was still in a growing trend, and E-commerce had a significant contribution.

- Consumers are looking for safety, healthiness and happiness in food. Fast-cooked noodle, cooking oil and cheese let people cook at home and fulfilled their need of food safety. Sugar-free soy milk, coconut water, sugar-free liquid yogurt and solid yogurt all linked to the concept of healthiness. Candy and snacks could add additional happiness to buyers' life, which also performed well.
- The growth from makeup had enlarge non-food market. Also, it is observed that there was a trend of personalization in shampoo, toothbrush and soap. Moreover, lots of imported brands entered Taiwan's laundry detergent market, which provided more offers to customers.

② PX mart still maintained its leading role in food category. On the other hand, reaching 30% growth rate in sales value, EC was another channel that full of potential. Momo, Yahoo and Pchome were the biggest retailers, while Shopee and Facebook were two fast-growing platform that shouldn't be neglected.

Taiwan Total FMCG Market 52 w/e rolling trend

Total FMCG market has bounced back since late 2016 and it continued to grow in this quarter.



KANTAR WORLDPANEL Category trend

FOOD

Safety

Cooking oil,
Fast-cooked noodles, Cheese

Healthiness

Sugar-free soy milk, Coconut water,
Sugar-free Liquid yogurt, Solid yogurt

Happiness

Candy, Snacks

KANTAR WORLDPANEL Category trend

NON FOOD

Beauty

Makeup

Personalization

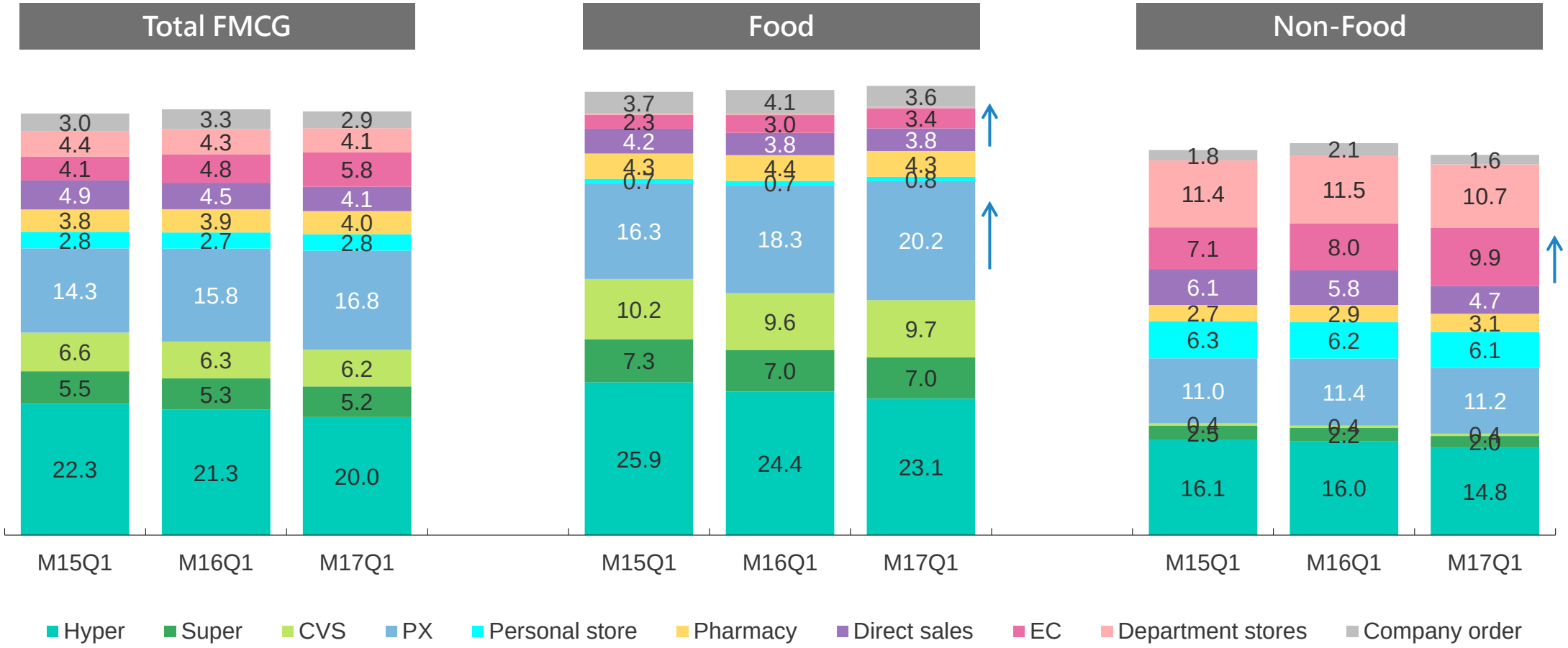
Shampoo, Soap, Toothbrush

Imported product

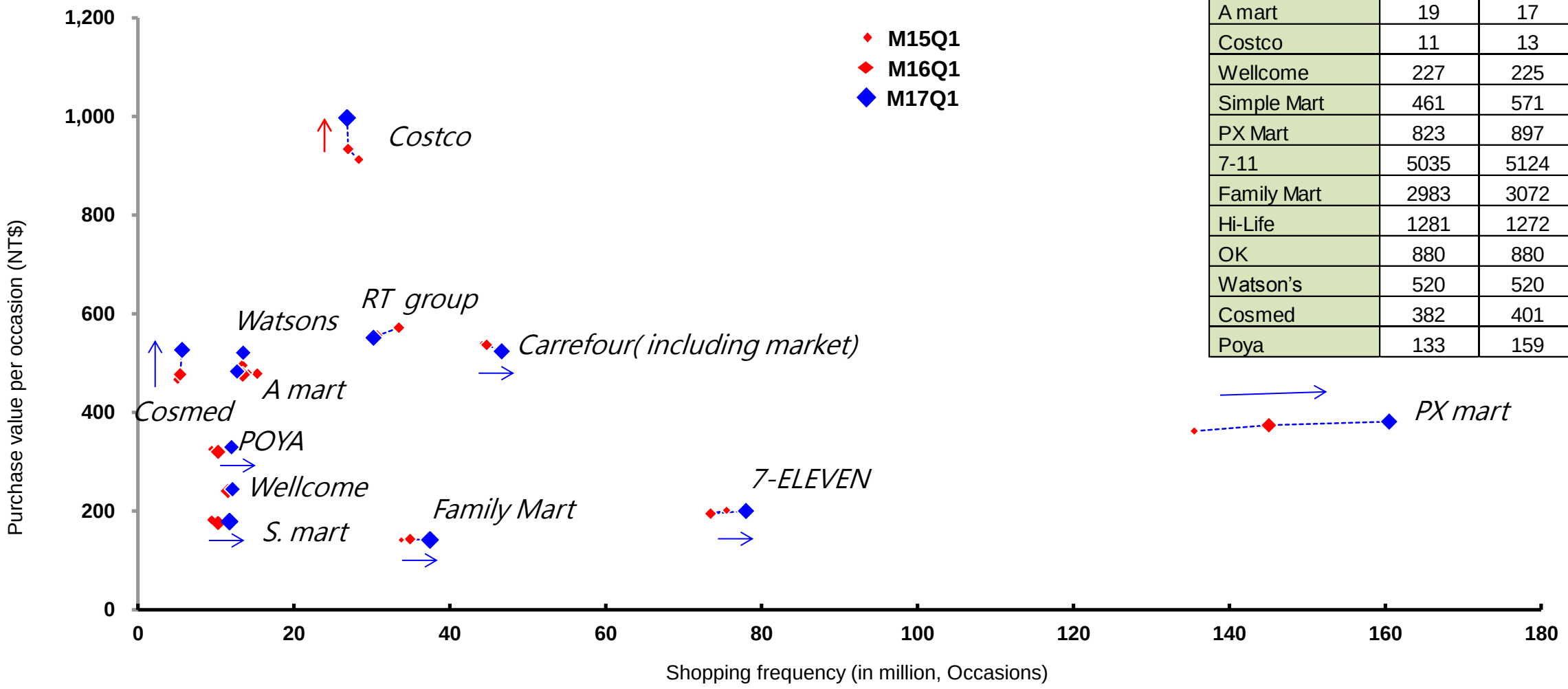
Liquid laundry detergent

Main channel performance in market– sales value %

PX performed well in food category, especially in cooking oil, seasoning sauce, dairy, and RTD tea. While EC has enlarge its importance in both food and non-food. Roasted and ground coffee, tea bag, health food(including chicken essence and bird nest), toilet paper, skin care and makeup were the major contributors.



Retailer Trend– Total FMCG market



Store No.	2016-Mar	2017-Mar	GR%
C4 (incl. Market)	85	97	14%
Carrefour	64	65	2%
Market	21	32	52%
RT group	24	24	0%
A mart	19	17	-11%
Costco	11	13	18%
Wellcome	227	225	-1%
Simple Mart	461	571	24%
PX Mart	823	897	9%
7-11	5035	5124	2%
Family Mart	2983	3072	3%
Hi-Life	1281	1272	-1%
OK	880	880	0%
Watson's	520	520	0%
Cosmed	382	401	5%
Poya	133	159	20%