KANTAR WORLDPANEL

Consumer Insights

ASIA Q2 2017

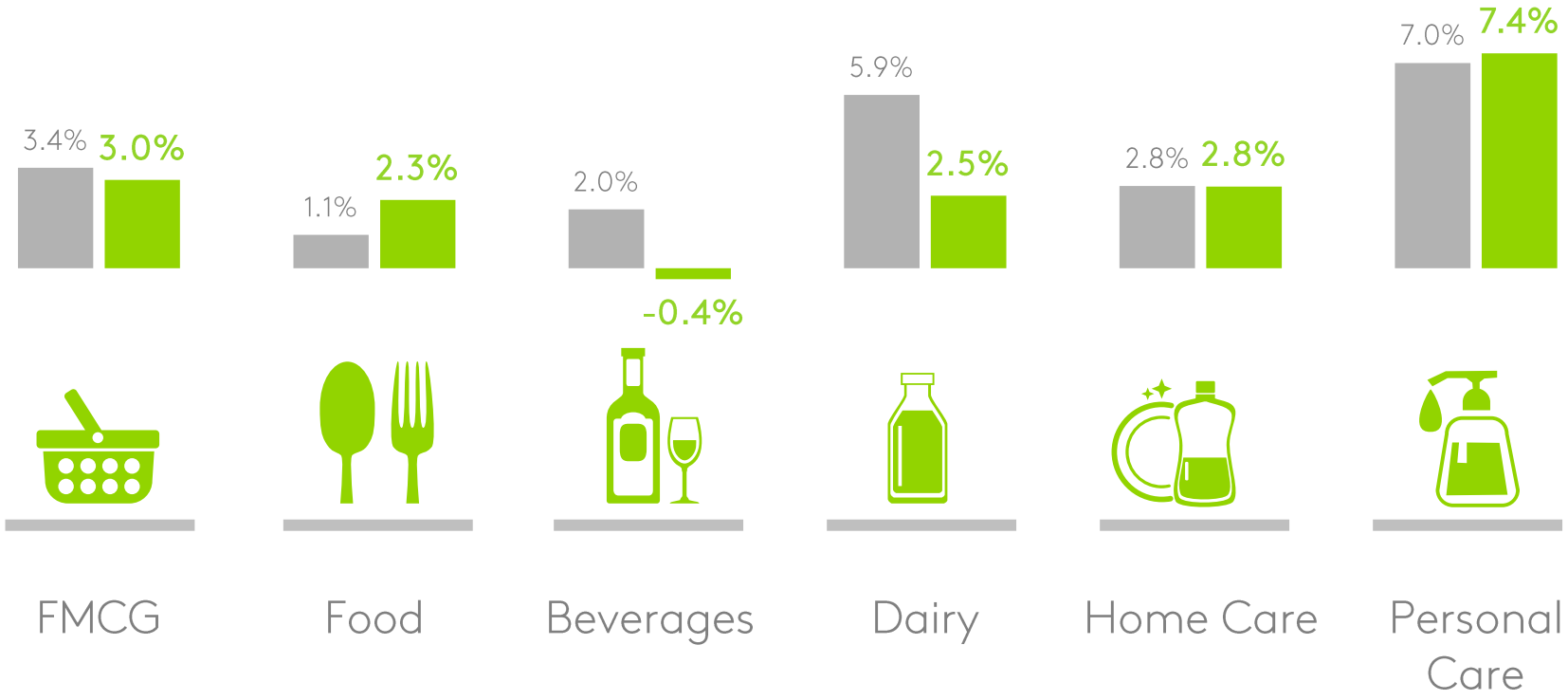
Q2 2017 | SUMMARY ASIA

	Northeast Asia			West Asia		Southeast Asia				
	China	Taiwan	South Korea	India (Urban)	Saudi Arabia	Malaysia	Thailand	Philippines	Vietnam (Urban)	Vietnam (Rural)
FMCG Total	3.1	6.3	1.6	6.7	-4.7	-0.5	1.0	3.0	4.9	4.9
Food	1.4	8.5	-0.3	7.2	-2.1	0.6	4.1	4.3	6.2	0.0
Beverages	-1.0	4.8	2.7	3.3	-4.0	-3.5	-3.9	-1.5	6.9	6.6
Dairy	3.0	6.7	1.3	-0.9	-5.4	-3.3	0.3	4.4	0.4	7.8
Home Care	2.5	8.1	-4.6	7.9	-7.3	-0.2	3.6	5.0	7.8	5.7
Personal Care	9.3	4.5	5.4	6.0	-7.5	2.1	0.7	3.0	8.4	9.3

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

% Value Change FMCG – MAT Q2 2017 vs. Year Ago

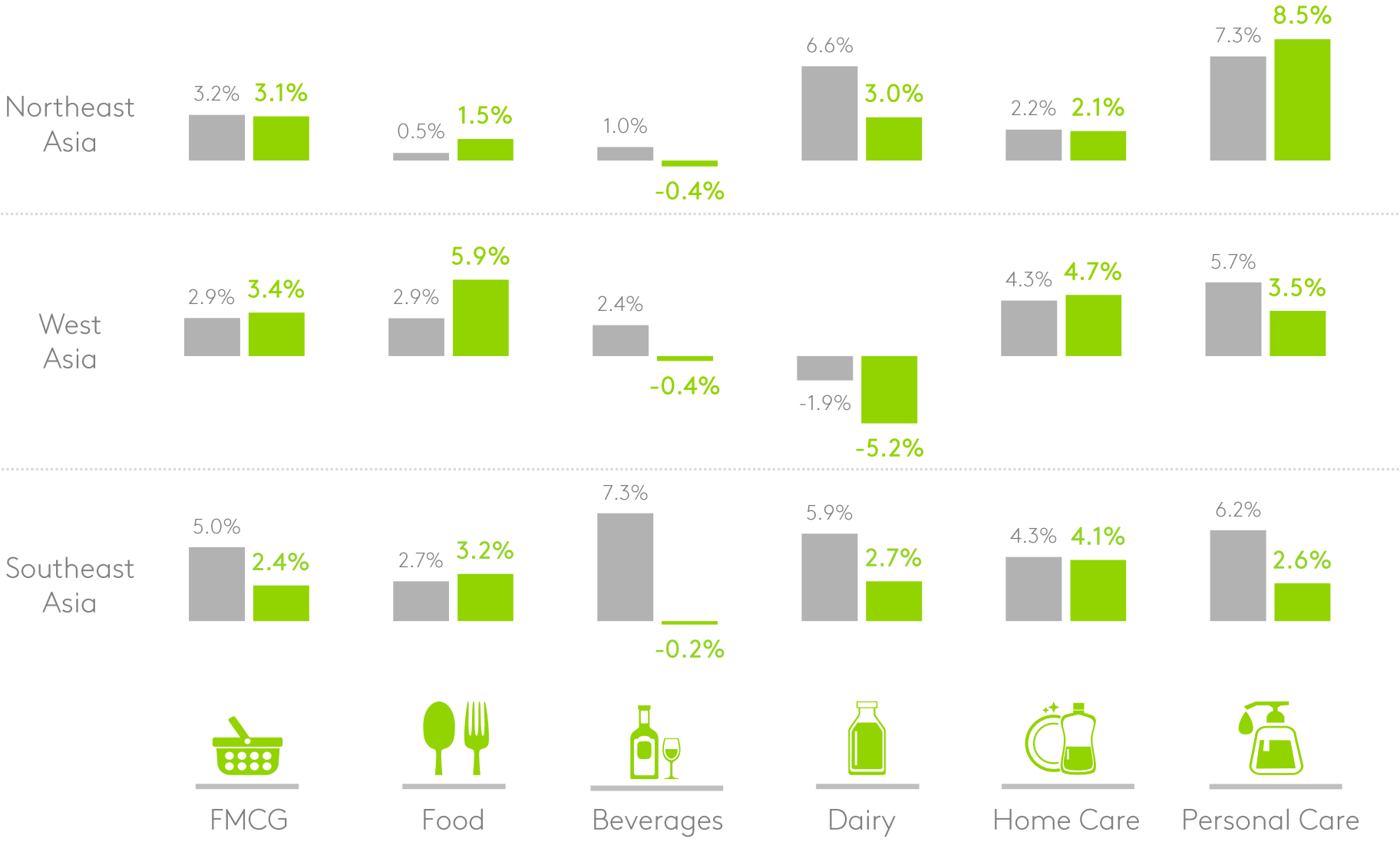
FMCG GROWTH IN ASIA : YOY



ASIA / MAT – VALUE SPEND GROWTH

Q2'16 vs Q2'15 Q2'17 vs Q2'16

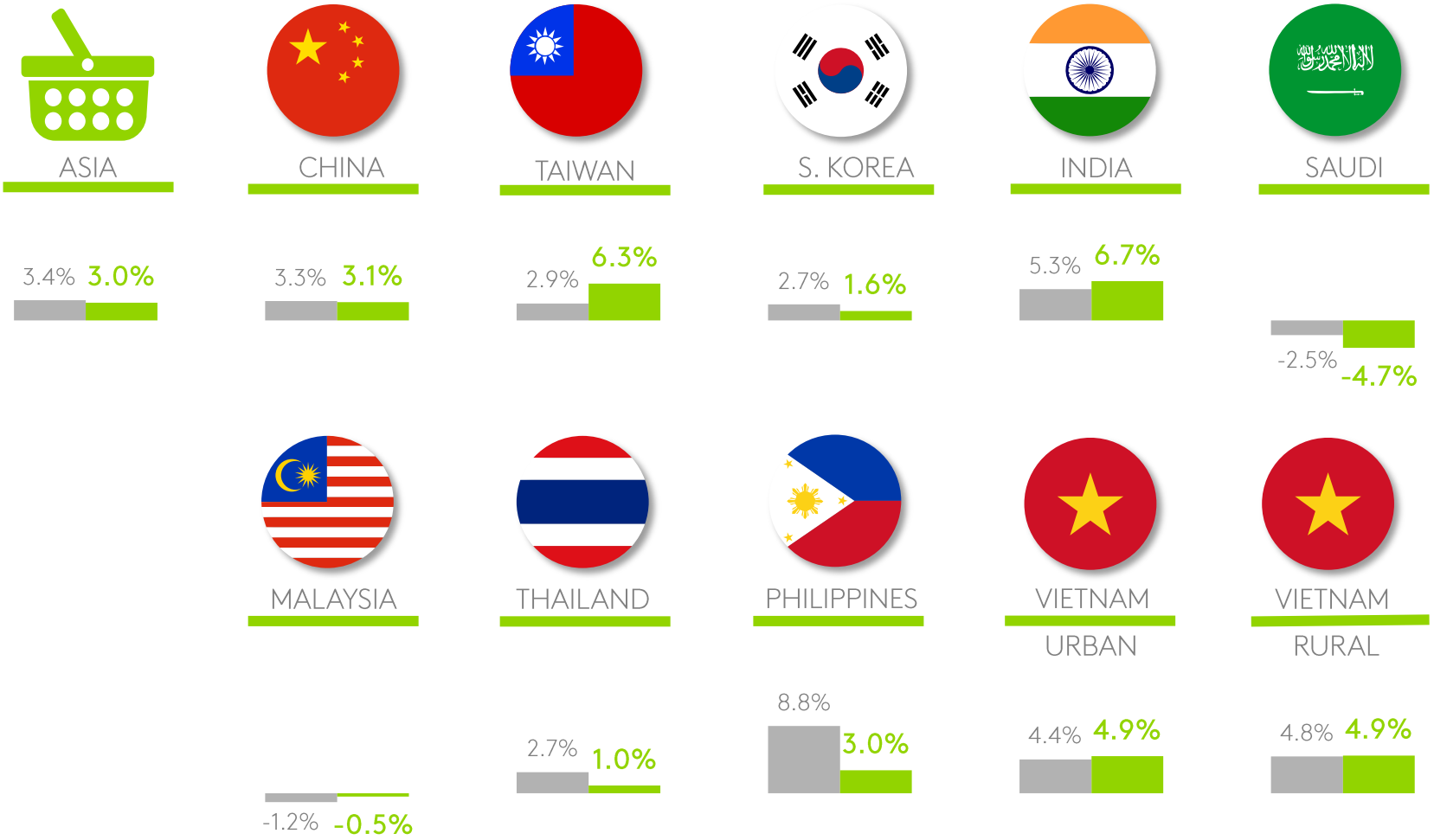
FMCG GROWTH IN ASIA : YOY



ASIA / MAT – VALUE SPEND GROWTH

■ Q2'16 vs Q2'15 ■ Q2'17 vs Q2'16

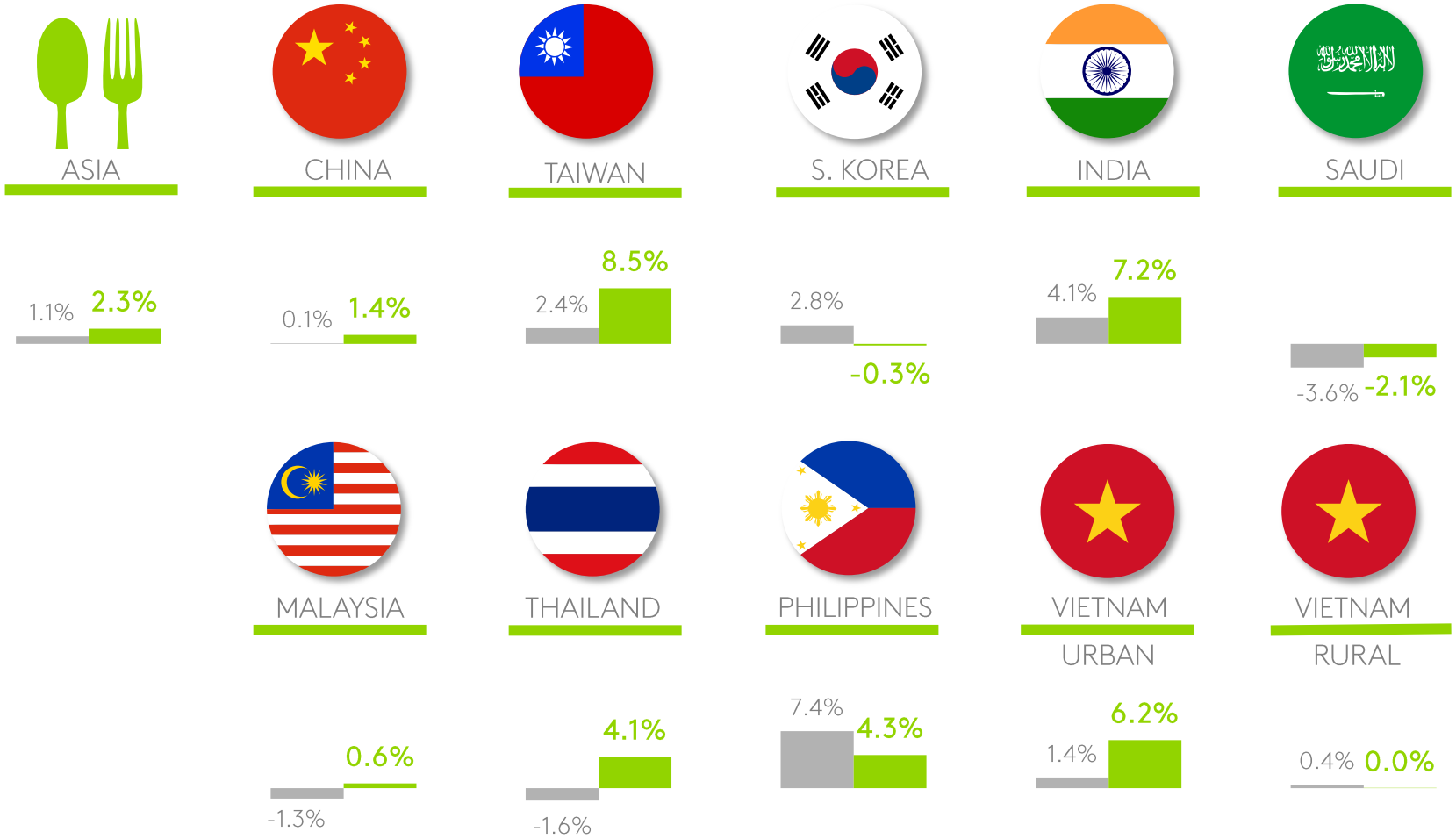
FMCG: Overall market was flat; India the best performer amongst all other countries



ASIA / MAT Q2 2017 – Value Growth FMCG

Q2'16 vs Q2'15 Q2'17 vs Q2'16

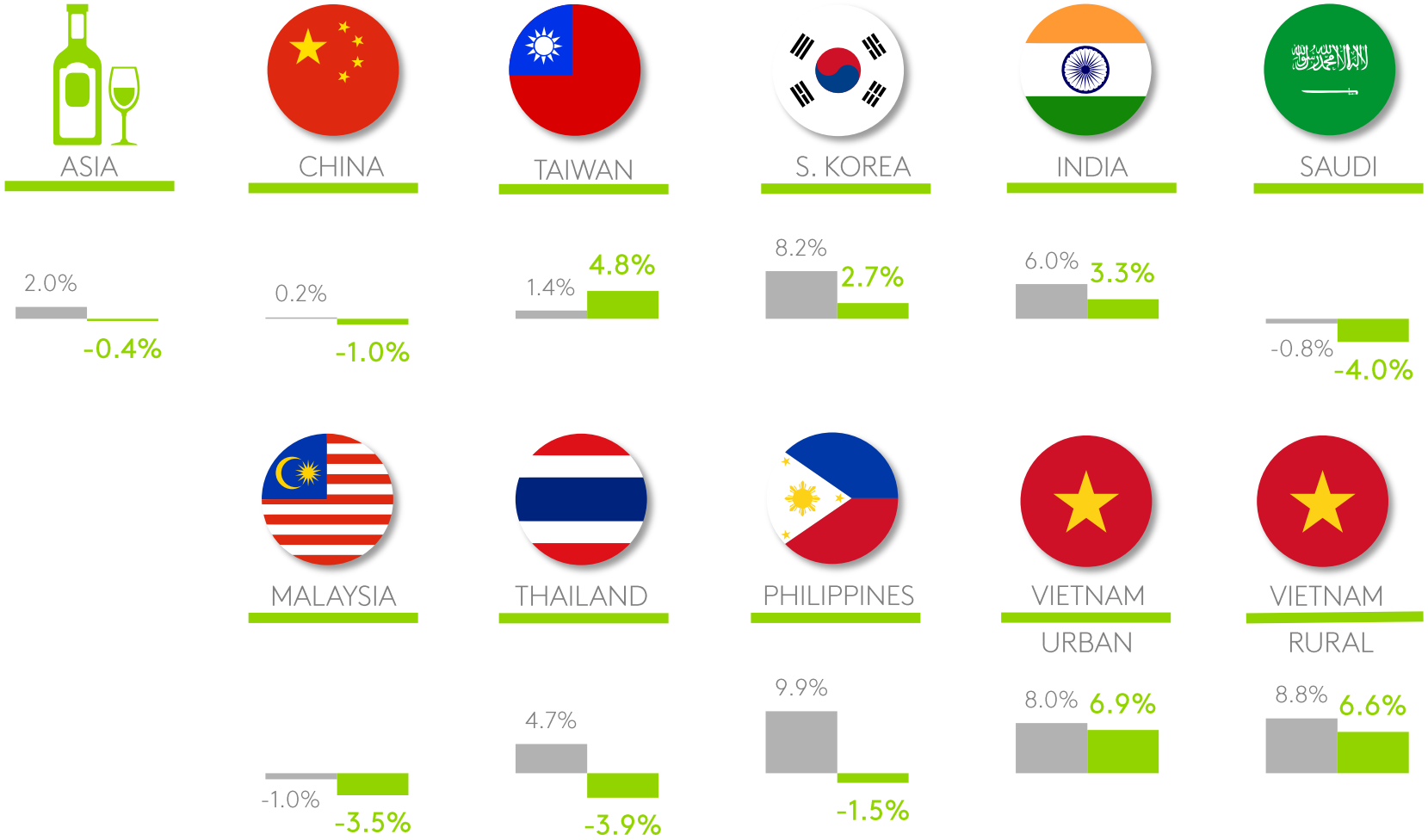
FOOD: Registered positive growth in Q2 as is still basic necessity and priority



ASIA / MAT Q2 2017 – Value Growth FOOD

Q2'16 vs Q2'15 Q2'17 vs Q2'16

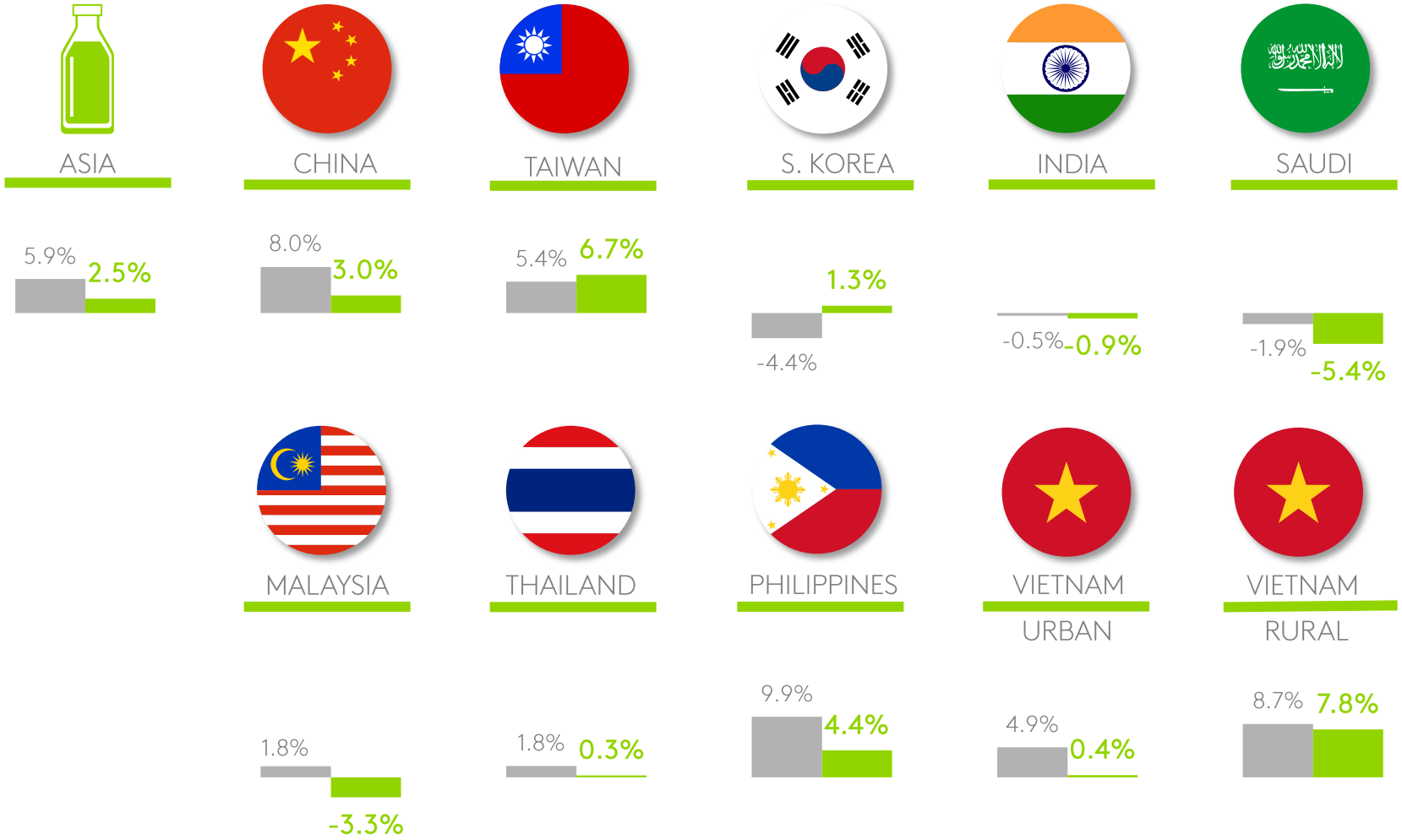
BEVERAGES: Continued to slow down due to growth from more affordable categories like water



ASIA / MAT Q2 2017 – Value Growth BEVERAGES

Q2'16 vs Q2'15 Q2'17 vs Q2'16

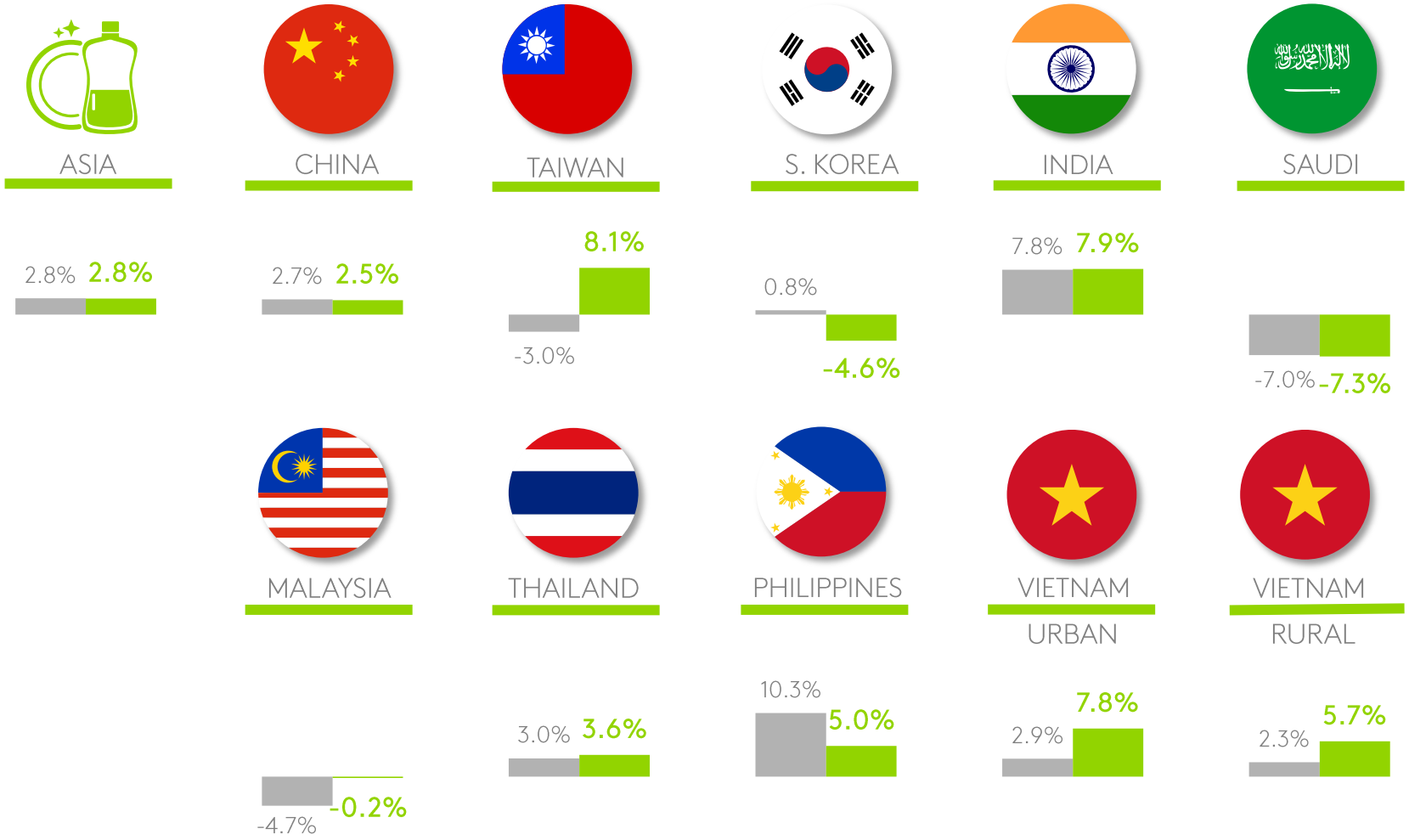
DAIRY: There is more headroom for growth; category needs to stay relevant



ASIA / MAT Q2 2017 – Value Growth DAIRY

Q2'16 vs Q2'15 Q2'17 vs Q2'16

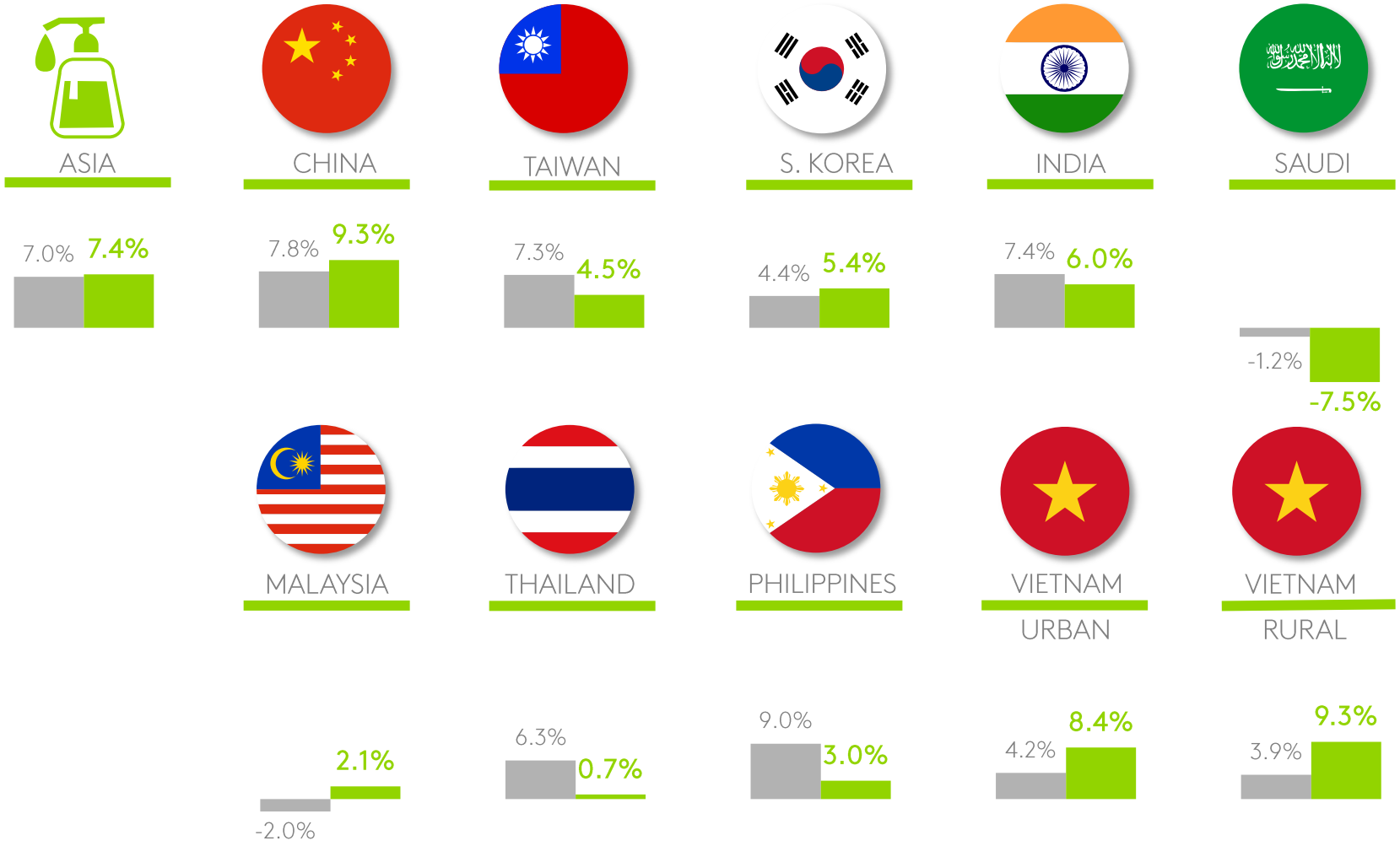
HOME CARE: Performed stably in Q2; hygiene concern the important factor for driving growth



ASIA / MAT Q2 2017 – Value Growth HOME CARE

Q2'16 vs Q2'15 Q2'17 vs Q2'16

PERSONAL CARE: Posted stellar performance; consumers are getting more image conscious



ASIA / MAT Q2 2017 – Value Growth PERSONAL CARE

MAT Q2 2017 | SUMMARY ASIA

CHINA

#StableOutlook China's economy expanded by 6.9% in Q2, unchanged from Q1. FMCG market maintained the growth of 3.1%.

#DigitalTrend Growth potential of e-commerce channel is strong in China, reaching over 7% market share in value.

#PersonalCleanliness Personal Care segment remained significant; consumers are trending towards more health-conscious personal hygiene.

TAIWAN

#PositiveTerritory The pace of recovery of the FMCG market was stably positive, with the overall growth at 6.3% in Q2.

#SugarFree Healthy eating habit sustained sugar-free products to grow, such as RTD tea and soymilk.

#E-Opportunities Personal care products such as shampoo, bar soap, derma, sprang up on the Internet, competing with mass brands.

S. KOREA

#EconomyUptrend Continuous uptrend of consumer-related index due to the expectation of new government/policy and the upswing in exports.

#Click-to-Brick Consumers are willing to try new products launched by e-commerce brands, which then expanded from online to physical stores in Korea.

#CollaborationWins Grocery brands are increasing their value by engaging in collaborations with brands in various fields such as sports/fashion in order to attract millennials.

INDIA

#DemonetizationImpact Digitization coupled with demonetization effect has led more consumers to shopping online compared to previous year

#Convenience Ease of convenience has led consumers to replace traditional cooking items with easy to cook options like pasta, soups, macaroni etc

#GrowingE-Shoppers Average spends of digital users are higher as they tend to purchase more categories and larger packs compared to non-digital users.

SAUDI ARABIA

#Slowdown Saudi continues to suffer economically from a prolonged war on Yemen and low oil prices, causing slowdown in FMCG market.

#SpendingCut Saudi shoppers are spending less on overall FMCG needs, while volumes are broadly stable. Personal Care & Home Care are the hardest hit - declined in both value and volume.

#Promo! HHs are picking up more on promotion purchases, leading to the drop in overall value spends.

MAT Q2 2017 | SUMMARY ASIA

MALAYSIA

#RobustGrowth Economy expanded at a faster pace of 5.8% and consumer confidence has shown positive improvement in Q2.

#RecoverySigns Year-to-date FMCG showed signs of recovering but has yet to stabilize. Consumer spending is on slow pick up.

#NeatAndClean Personal Care segment registered the strongest growth amongst all, revealing personal grooming is important to consumer.

THAILAND

#SpendingRestraint Consumers cut back on their spending due to slow recovery and uncertainty in economic conditions.

#Rationalize High income households are rationalizing thieir expenditure on personal care segment, becoming more selective and reducing their spend on key categories.

#RiseOf E-commerce While online channel is still small, it shows sign of taking off. Consumers in Thailand are getting more tech savvy.

PHILIPPINES

#PositiveOutlook Philippines economy recorded a 6.5% GDP growth, while confidence index soaring to a record high of 13.1% in Q2.

#BiggerBaskets Total FMCG posted stable performance but still growing in trip size; consumer buying larger volume per trip.

#BoomBoomPowder Laundry powder drives overall momentum in Home Care segment, leading a 5.0% value growth in Home Care.

VIETNAM

#ChallengeAhead GDP growth of Q2 sees improvement versus Q1 yet still challenging to meet the target of 6.5%.

#ModernTradeRecover Modern trade channels grew faster than general trade in Q2, with hypermarket & supermarket bounce back.

#Non-FoodOutperform Non-food categories enjoy impressive growth at double digit pace, with Personal Care segment growing the fastest.

CHINA

Top 5 Categories with Positive Impact – MAT Q2'17 vs Q2'16

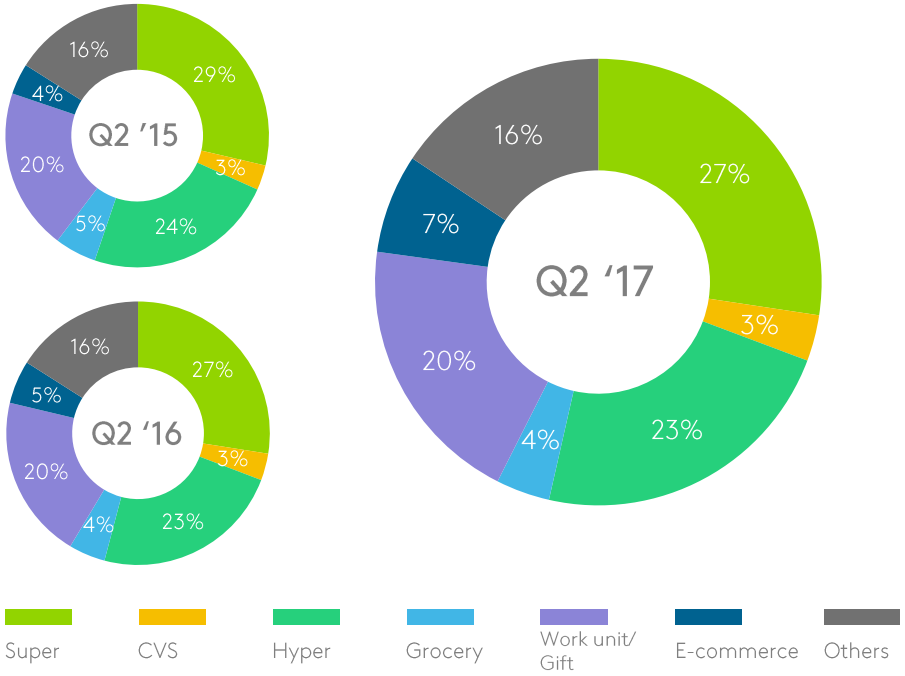
Value	Volume	Penetration
Mouthwash	Mouthwash	Oyster Sauce
Intimate Hygiene	Kitchen Rolls	Mint Candy
Kitchen Rolls	Wet Tissues	Kitchen Rolls
Packaged Water	Female Hair Remover	Mouthwash
RTD Tea	Bleach	Toliet Perfume

%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q3'16 VS year ago	MAT Q4'16 VS year ago	MAT Q1'17 VS year ago	MAT Q2'17 VS year ago
Total	Yellow	Yellow	Yellow	Yellow
Low Income	Grey	Grey	Yellow	Yellow
Mid Income	Grey	Grey	Grey	Grey
High Income	Green	Green	Green	Green

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

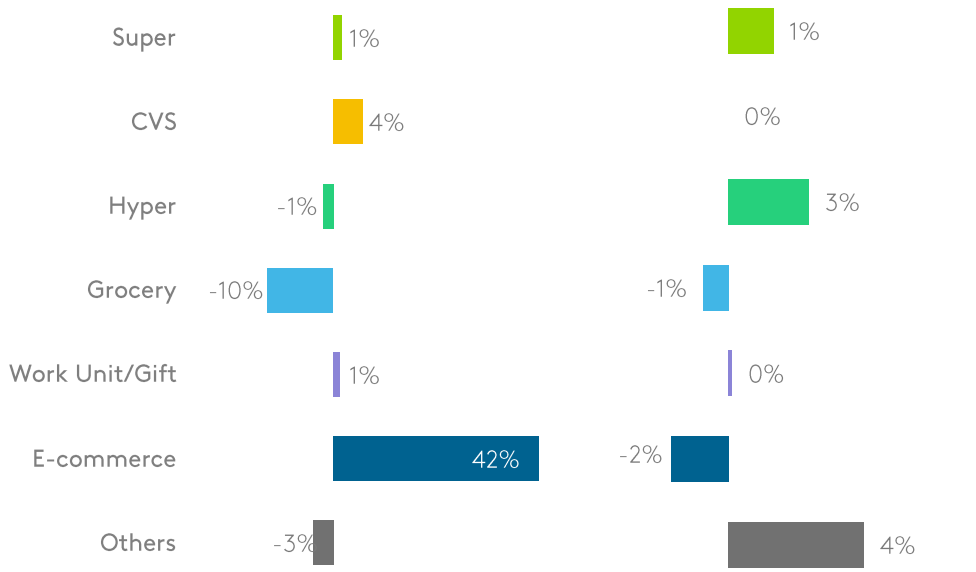
Channel Importance - %Value



Shopping Occasions

Spend/Trip

MAT Q2'17 v Q2'16



TAIWAN

Top 5 Categories with Positive Impact – MAT Q2'17 vs Q2'16

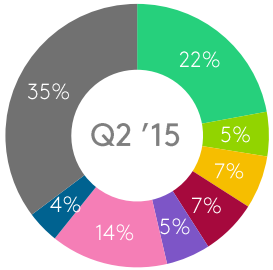
Value	Volume	Penetration
Cologne / Perfume	Chili Sauce	Toothbrush
Bird's Nest	Eye Makeup	Liquid Detergent
Preserves / Spread	Adult Diaper	Cooking Oil
Bar Soap	Bird's Nest	Ice Cream
Chewing Gum	Bar Soap	Bar Soap

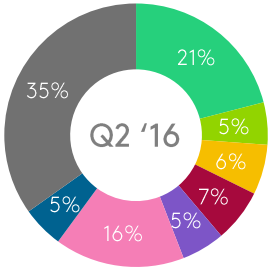
%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

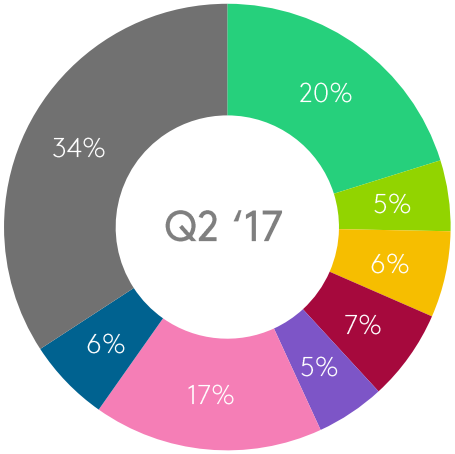
MAT	MAT Q3'16 VS year ago	MAT Q4'16 VS year ago	MAT Q1'17 VS year ago	MAT Q2'17 VS year ago
Total	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	Growth > 5%	Growth > 5%
Low Income	Growth > 5%	Growth > 5%	Growth > 5%	-0.5% < Growth ≤ 5%
Mid Income	Growth ≤ -0.5%	Growth ≤ -0.5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%
High Income	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%

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

Channel Importance - %Value





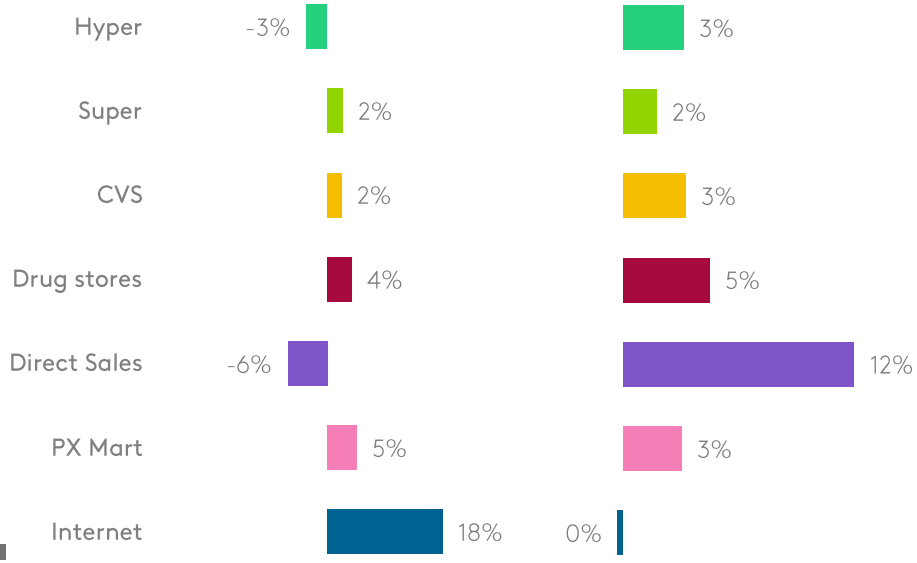


Others: gift & sample, grocery & provision, department stores, company order

Hyper | Super | CVS | Drug Stores | Direct Sales | PX Mart | Internet | Others

Shopping Occasions / Spend/Trip

MAT Q2'17 v Q2'16



KOREA

Top 5 Categories with Positive Impact – MAT Q2'17 vs Q2'16

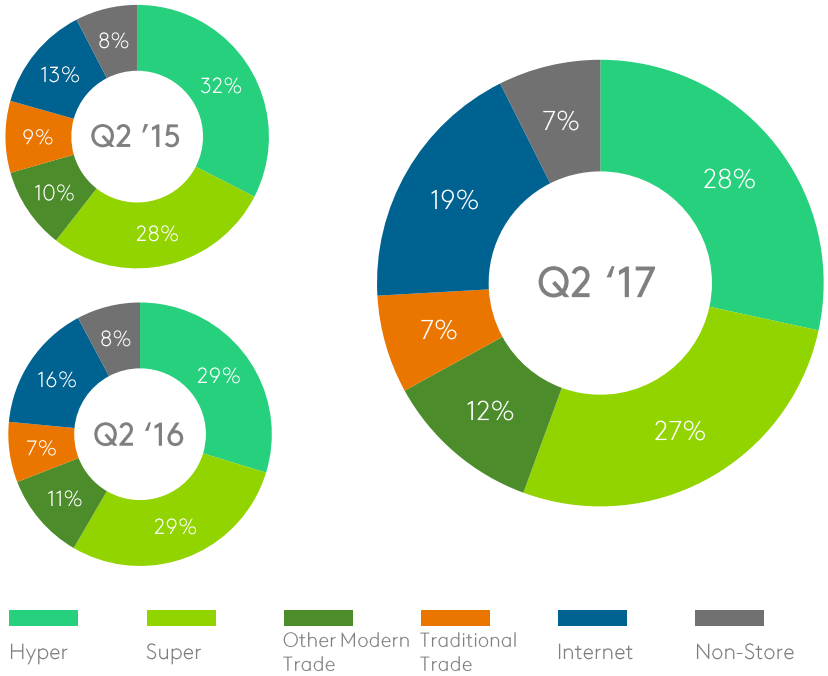
Value	Volume	Penetration
Retort	Pie	Retort
Kimchi	Spread	Foundation
Spread	Chocolate	Frozen prepared food
Foundation	Retort	Kimchi
Blusher	Foundation	Lipstick

%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q3'16 VS year ago	MAT Q4'16 VS year ago	MAT Q1'17 VS year ago	MAT Q2'17 VS year ago
Total	Growth ≤ -0.5%	Growth ≤ -0.5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%
Low Income	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	Growth > 5%
Mid Income	Growth ≤ -0.5%	Growth ≤ -0.5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%
Mid-High Income	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%
High Income	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth ≤ -0.5%

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

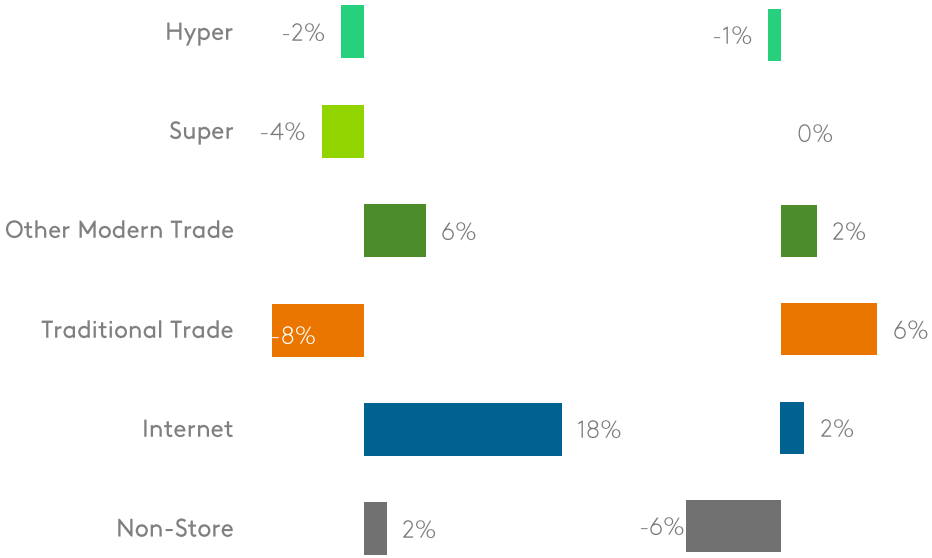
Channel Importance - %Value



Shopping Occasions

Spend/Trip

MAT Q2'17 v Q2'16



INDIA

Top 5 Categories with Positive Impact – MAT Q2'17 vs Q2'16

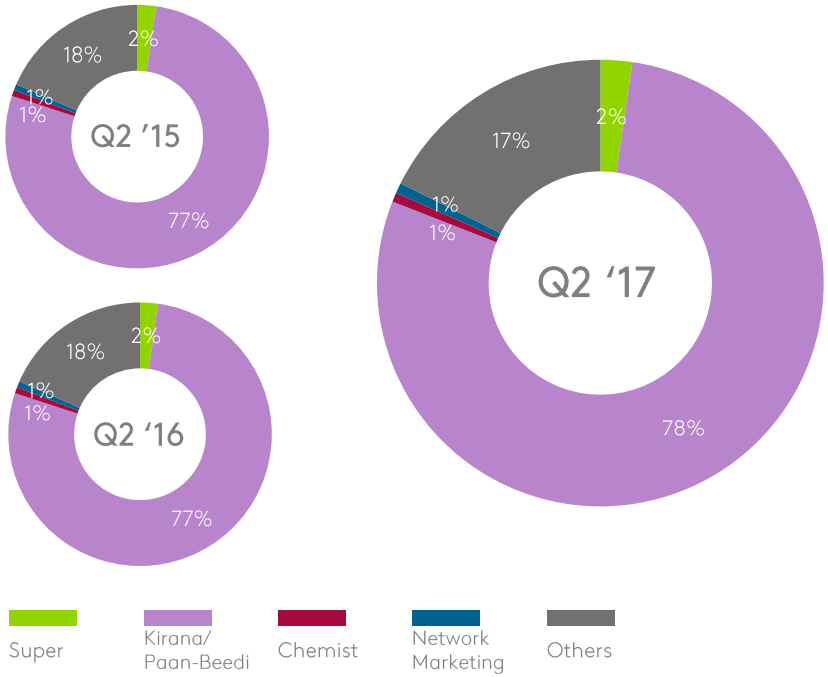
Value	Volume	Penetration
Noodle/Macaroni	Noodle/Macaroni	Noodle/Macaroni
Sauces	Sauces	Toilet/Bathroom Cleaner
Toilet/Bathroom Cleaner	Toilet/Bathroom Cleaner	Coffee
Floor Cleaner	Floor Cleaner	Floor Cleaner
Washing Powders	Rubs & Balms	Sauces

%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q3'16 VS year ago	MAT Q4'16 VS year ago	MAT Q1'17 VS year ago	MAT Q2'17 VS year ago
Total SEC	●	●	●	●
SEC AB	●	●	●	●
SEC C	●	●	●	●
SEC D/E	●	●	●	●

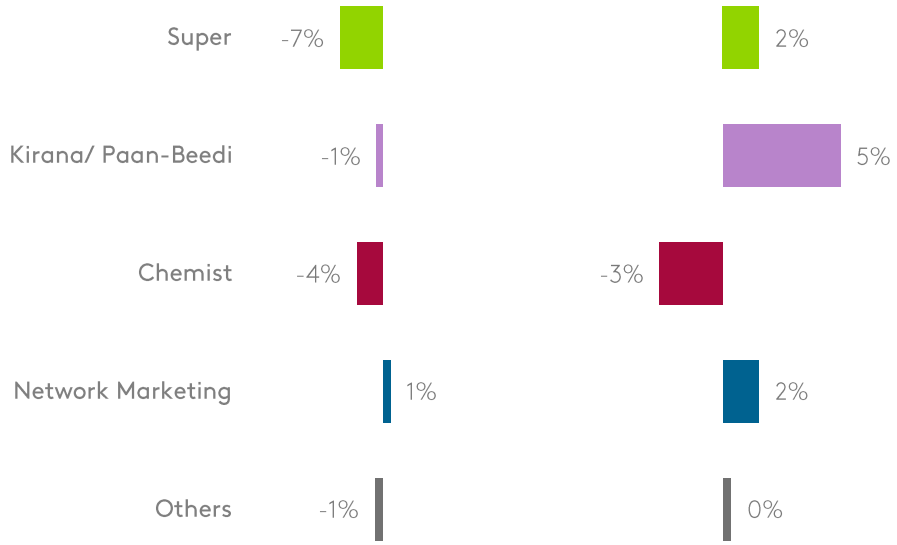
● Growth ≤ -0.5% ● -0.5% < Growth ≤ 5% ● Growth > 5%

Channel Importance - %Value



Shopping Occasions / Spend/Trip

MAT Q2'17 v Q2'16



SAUDI ARABIA

Top 5 Categories with Positive Impact – MAT Q2'17 vs Q2'16

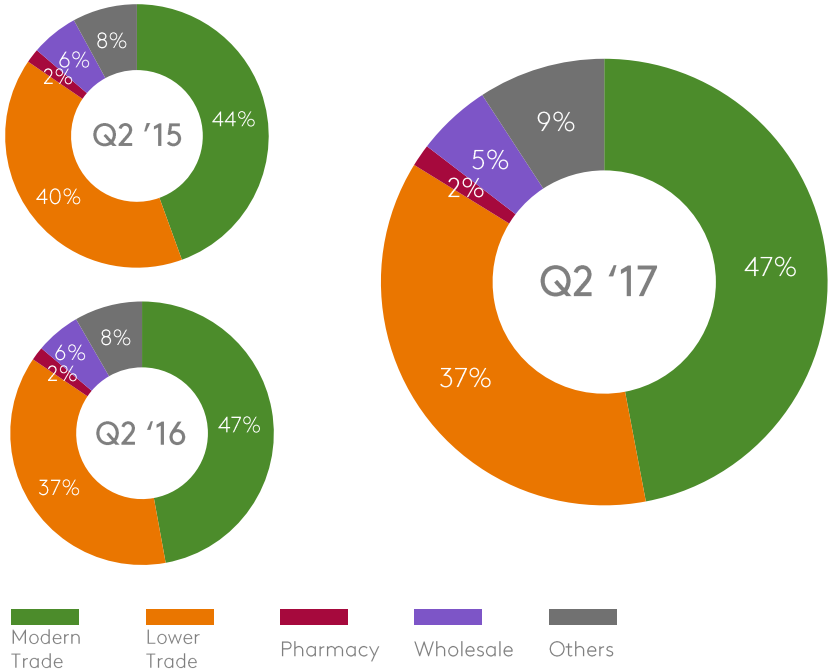
Value	Volume	Penetration
Honey	Chocolate Spreads	Chocolate Spreads
Sliced Bread	Toilet Cleaners	Honey
Chocolate Spreads	Glass Cleaners	Breakfast Cereals
Bottled Water	Sliced Bread	Jam
UHT Flavored Milk	Bouillon	Liquid Hand wash

%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q3'16 VS year ago	MAT Q4'16 VS year ago	MAT Q1'17 VS year ago	MAT Q2'17 VS year ago
Total SEC	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth ≤ -0.5%
SEC AB	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth ≤ -0.5%
SEC C	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth ≤ -0.5%
SEC D	Growth > 5%	-0.5% < Growth ≤ 5%	Growth ≤ -0.5%	Growth ≤ -0.5%

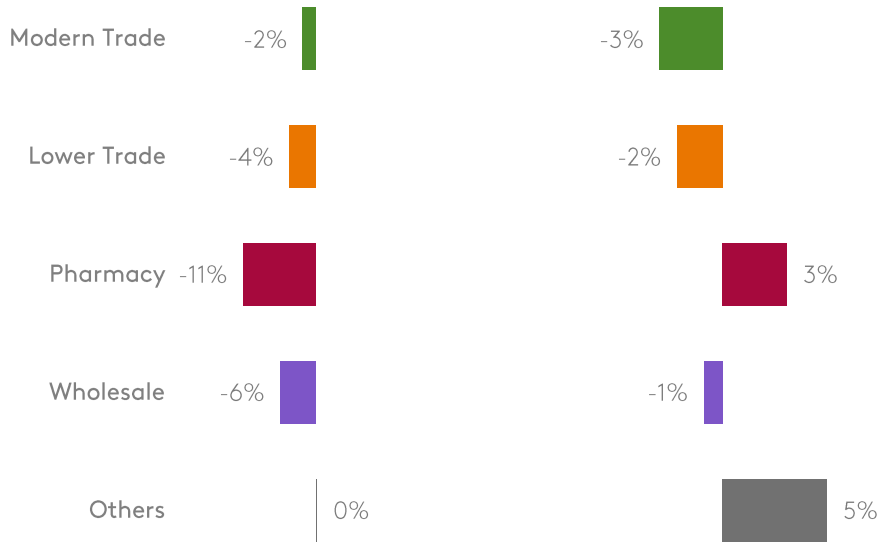
Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

Channel Importance - %Value



Shopping Occasions / Spend/Trip

MAT Q2'17 v Q2'16



MALAYSIA

Top 5 Categories with Positive Impact – MAT Q2'17 vs Q2'16

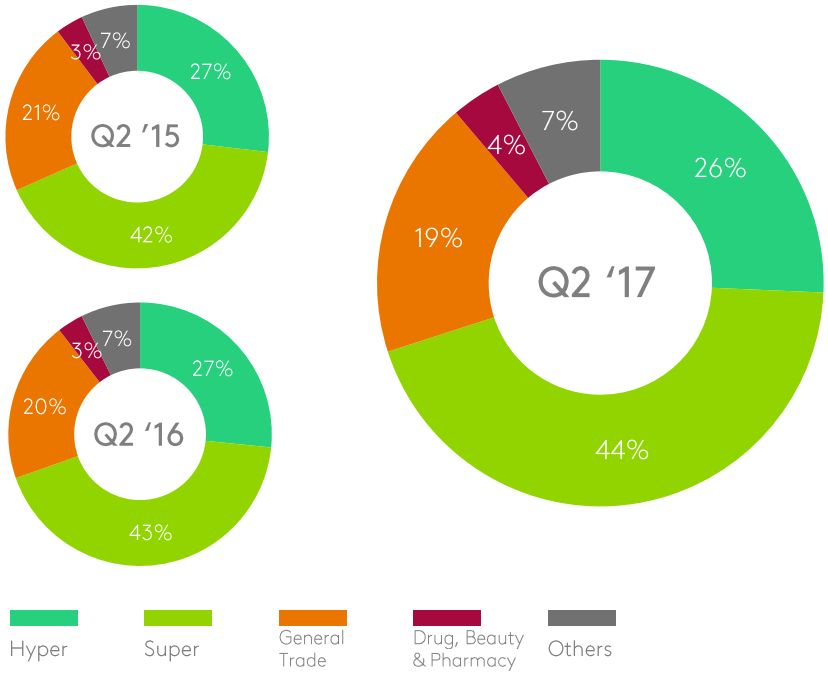
Value	Volume	Penetration
RTD Coffee	Shaving Foam/Gel	RTD Coffee
Shaving Foam/Gel	RTD Coffee	Cheese
Drinking Water	Hair Treatment	Liquid Milk
Hair Treatment	Adult Diaper	Air Freshener
Adult Diaper	Glass Cleaner	Cereal

%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q3'16 VS year ago	MAT Q4'16 VS year ago	MAT Q1'17 VS year ago	MAT Q2'17 VS year ago
Total	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth ≤ -0.5%
Low Income	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%
Mid Income	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth ≤ -0.5%
High Income	-0.5% < Growth ≤ 5%	Growth ≤ -0.5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%

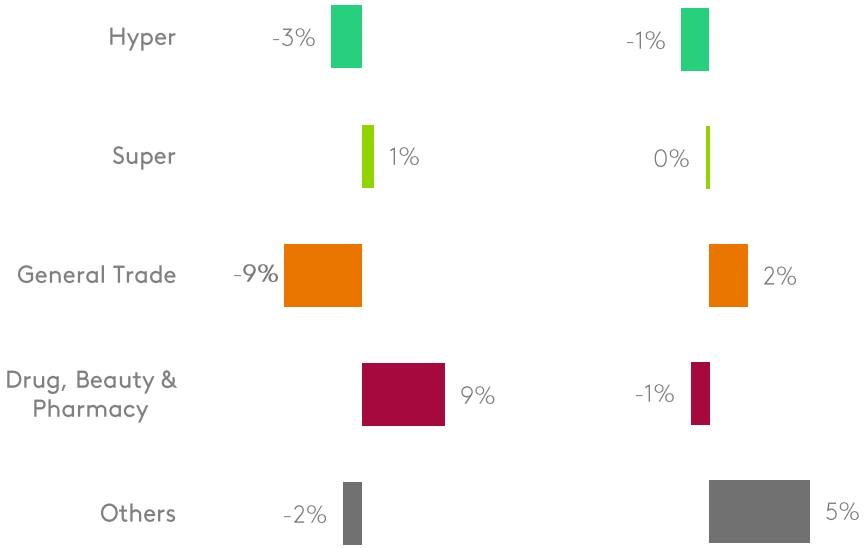
Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

Channel Importance - %Value



Shopping Occasions / Spend/Trip

MAT Q2'17 v Q2'16



THAILAND

Top 5 Categories with Positive Impact – MAT Q2'17 vs Q2'16

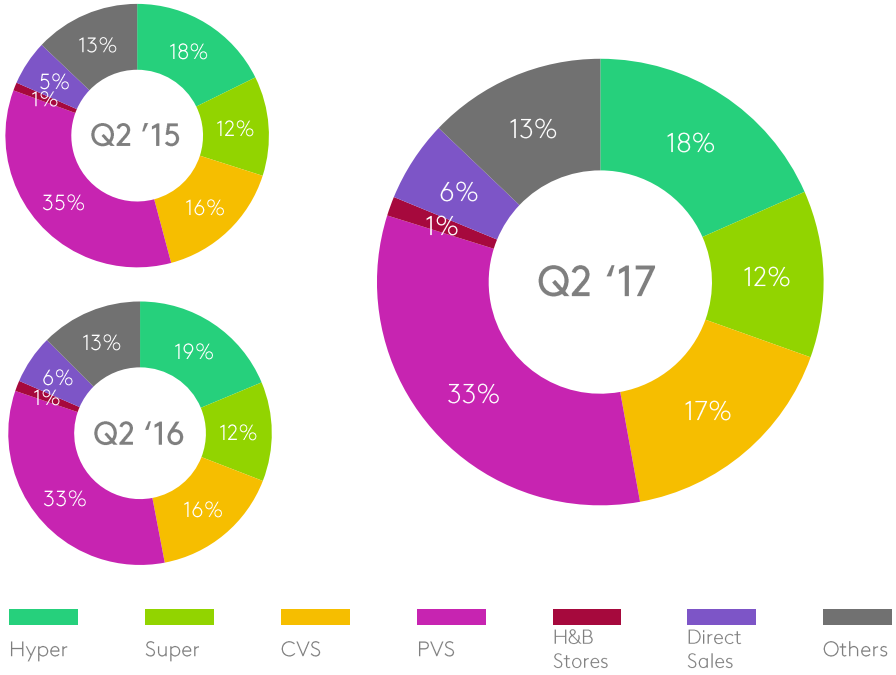
Value	Volume	Penetration
Air Freshener	Jam	Insect Control
Spread	Dressings	RTD TFD
Dressings	Air Freshener	Mask
Jam	Mask	Rice
Essence of Chicken	Essence of Chicken	Facial Tissue

%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q3'16 VS year ago	MAT Q4'16 VS year ago	MAT Q1'17 VS year ago	MAT Q2'17 VS year ago
Total	Yellow	Yellow	Yellow	Yellow
Low Income	Yellow	Yellow	Yellow	Green
Mid Income	Yellow	Yellow	Yellow	Yellow
High Income	Green	Green	Green	Grey

Grey: Growth ≤ -0.5% | Yellow: -0.5% < Growth ≤ 5% | Green: Growth > 5%

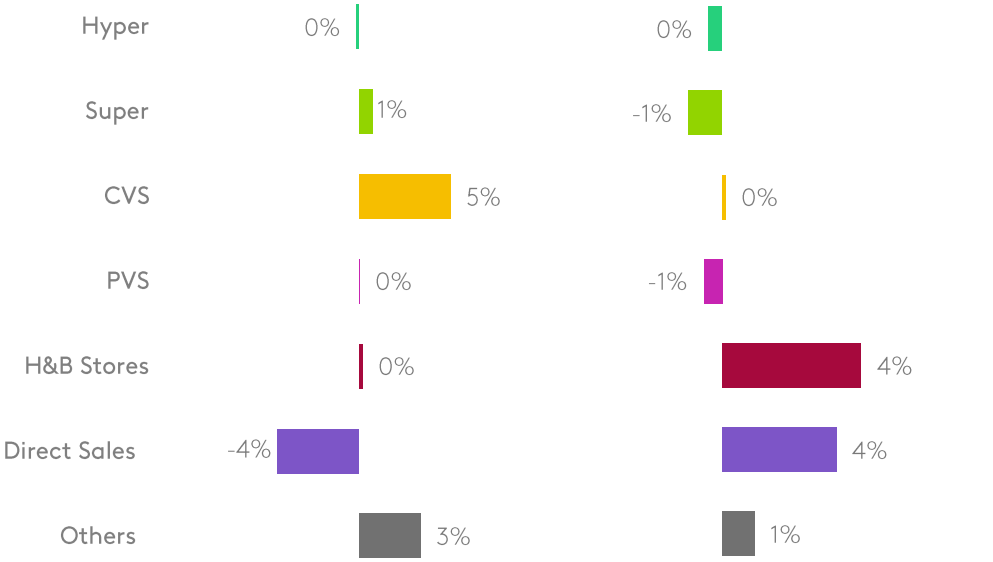
Channel Importance - %Value



Shopping Occasions

Spend/Trip

MAT Q2'17 v Q2'16



PHILIPPINES

Top 5 Categories with Positive Impact – MAT Q2'17 vs Q2'16

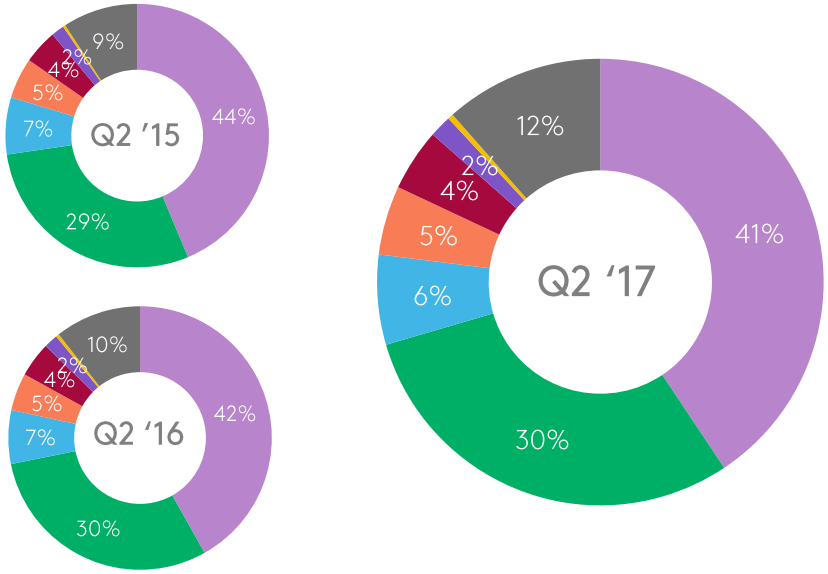
Value	Volume	Penetration
Liquid Detergent	Hair Colorant	Mouthwash
Hair Treatment	Liquid Detergent	Liquid Seasoning
Chocolate	Hair Treatment	Hair Treatment
Marshmallow	Instant Pasta	Mayonnaise/Salad Dr.
Baby Wipes/Wet Tissue	Marshmallow	Lechon Sauce

%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q3'16 VS year ago	MAT Q4'16 VS year ago	MAT Q1'17 VS year ago	MAT Q2'17 VS year ago
Total	Growth > 5%	Growth > 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%
Low Income	Growth > 5%	Growth > 5%	Growth > 5%	-0.5% < Growth ≤ 5%
Mid Income	Growth > 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%
High Income	Growth > 5%	Growth ≤ -0.5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%

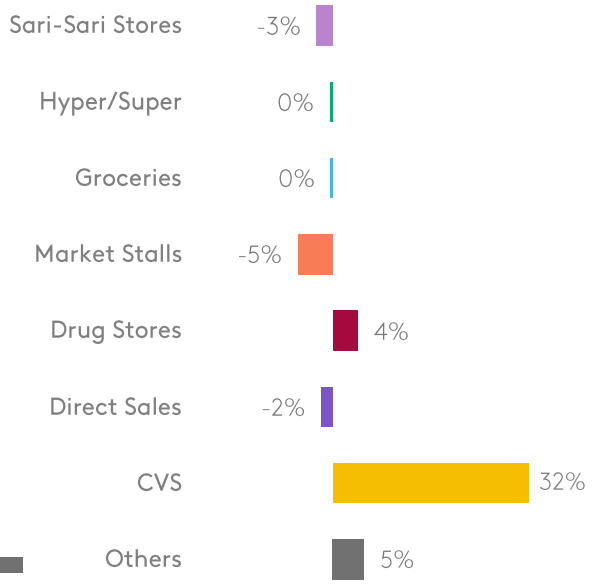
Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

Channel Importance - %Value



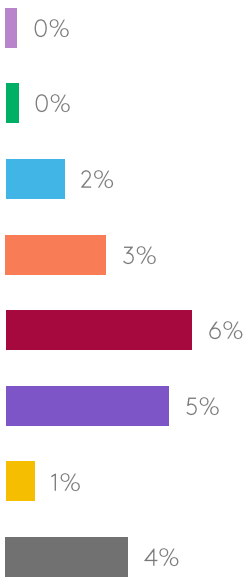
Sari-Sari Stores | Hyper/Super | Groceries | Market Stalls | Drug Stores | Direct Sales | CVS | Others

Shopping Occasions



Spend/Trip

MAT Q2'17 v Q2'16



VIETNAM URBAN

Top 5 Categories with Positive Impact – MAT Q2'17 vs Q2'16

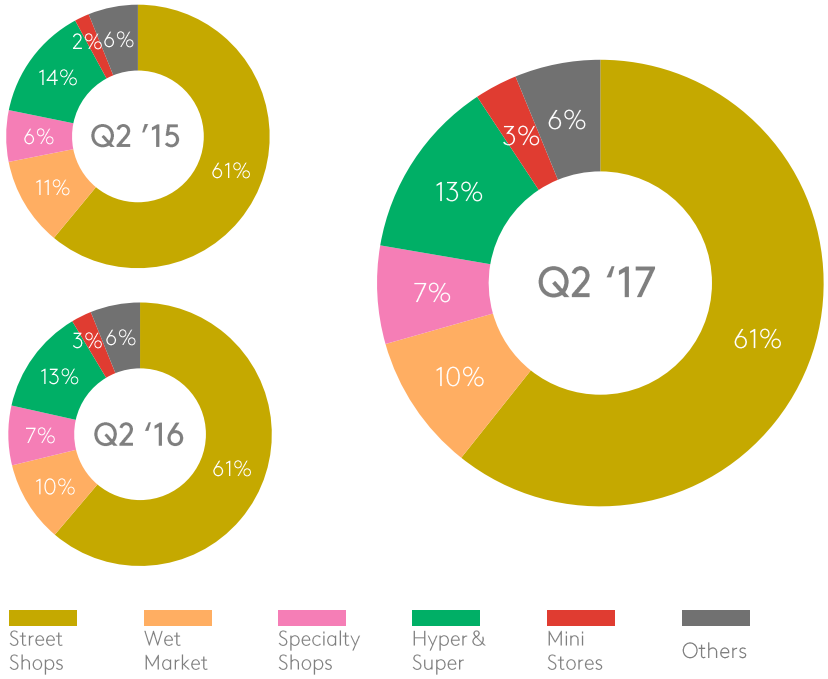
Value	Volume	Penetration
Sun Protection	Sun Protection	Ketchup/Tomato Sauce
Lipstick	Lipstick	Mayonnaise
RTD GUM	RTD GUM	Liquid Detergent
Mayonnaise	Functional Drinking Yogurt	Lipstick
Functional Drinking Yogurt	Mayonnaise	Instant Tea

%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q3'16 VS year ago	MAT Q4'16 VS year ago	MAT Q1'17 VS year ago	MAT Q2'17 VS year ago
Total	Yellow	Yellow	Green	Yellow
Low Income	Grey	Grey	Grey	Grey
Mid Income	Grey	Grey	Grey	Yellow
Mid-High Income	Green	Green	Green	Green
High Income	Green	Green	Green	Green

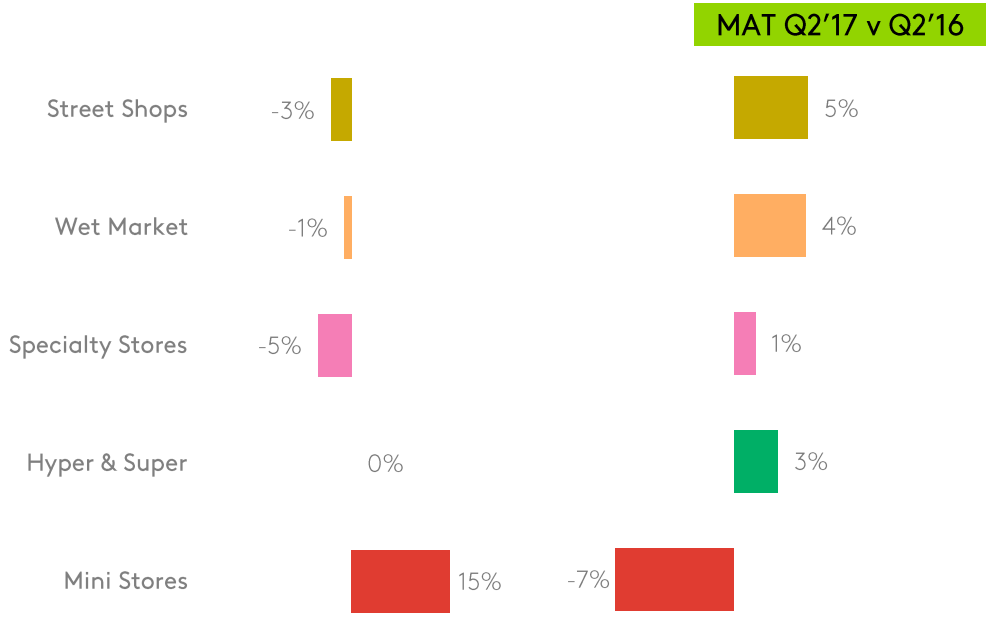
Grey: Growth ≤ -0.5% | Yellow: -0.5% < Growth ≤ 5% | Green: Growth > 5%

Channel Importance - %Value



Shopping Occasions

Spend/Trip



VIETNAM RURAL

Top 5 Categories with Positive Impact – MAT Q2'17 vs Q2'16

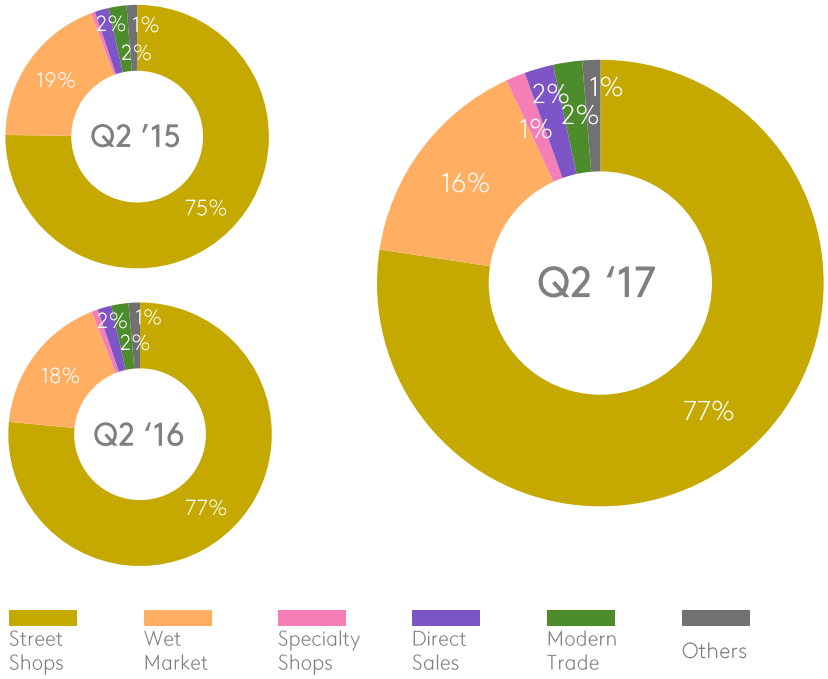
Value	Volume	Penetration
RTD GUM	RTD GUM	Biscuits
Liquid Detergent	Liquid Detergent	Liquid Detergent
Make-Up	Make-Up	Liquid Bath
Biscuits	Snack & Nuts	Loose Leaf Tea
Adult Milk Powder	Facial Care	Sweetened Condensed

%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q3'16 VS year ago	MAT Q4'16 VS year ago	MAT Q1'17 VS year ago	MAT Q2'17 VS year ago
Total	-0.5% < 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	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%

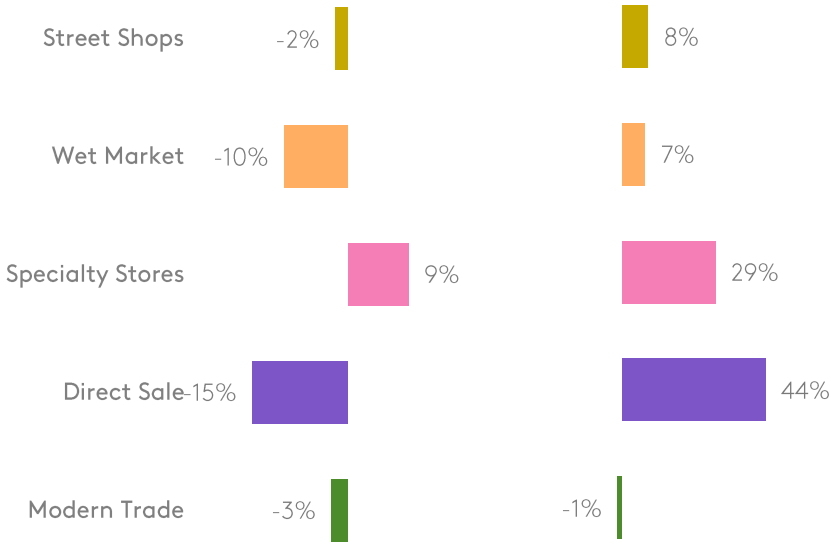
Channel Importance - %Value



Shopping Occasions

Spend/Trip

MAT Q2'17 v Q2'16



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Thank you

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