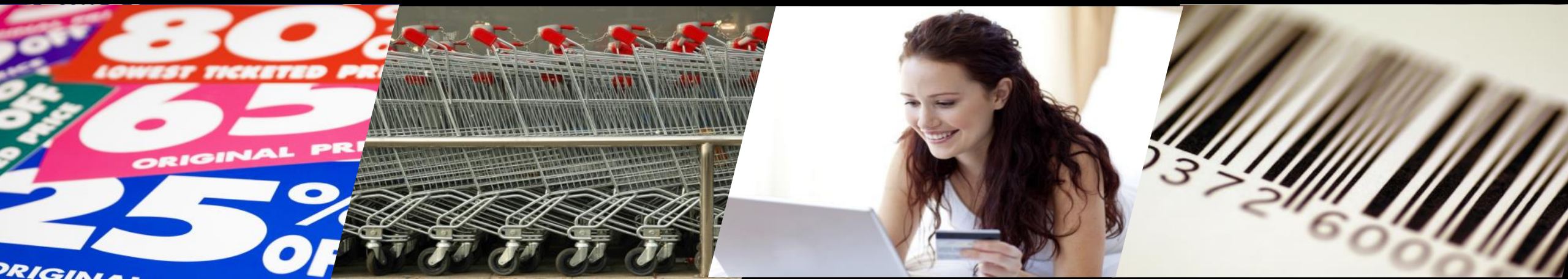
KANTAR WORLDPANEL

# Taiwan FMCG Market Trend

2017 Q3



# 2017 Q3 Main Economics Indicators key index

| Gross Domestic Product (GDP) | Consumer Price Index (CPI) | Unemployment rate | Total FMCG market sales value growth VSLY |
|---|---|---|---|
| +3.11% | +0.59 % | 3.77 % | +5.4 % |
| 2017Q3 | YTD2017Q3 | 2017 September | MAT2017Q3 |

① The global economy still maintains its momentum, and the FMCG market of Taiwan also performed well with the growth rate of 5.4% in quarter three.

- In food categories, fast-cooked noodles、cooking oil and seasonings still show the growing trend and have no sign of slowing down. Besides that consumers are willing to spend money on the health food products like chicken essence、bird nest, Calcium、Glucosamine which can strengthen bone health and B-complex can keep them refresh. Also ice、candy、coffee( including RTD and ground coffee) products also grow well as they raise satisfaction immediately to the consumers but cost relatively low.

- For the non-food categories, people have high demand to make-up、shampoo and oral care. While liquid detergent performs well across all price tiers, toilet paper consumers tend to buy products either with premium quality or cheaper price.

② Channels: Super market(especially PX Mart) dominates the food categories. E-commerce increases the share importance both in the food and non-food categories. Top 3 EC platforms remain Momo、Yahoo and Shopee.

# Taiwan Total FMCG Market 52 w/e rolling trend

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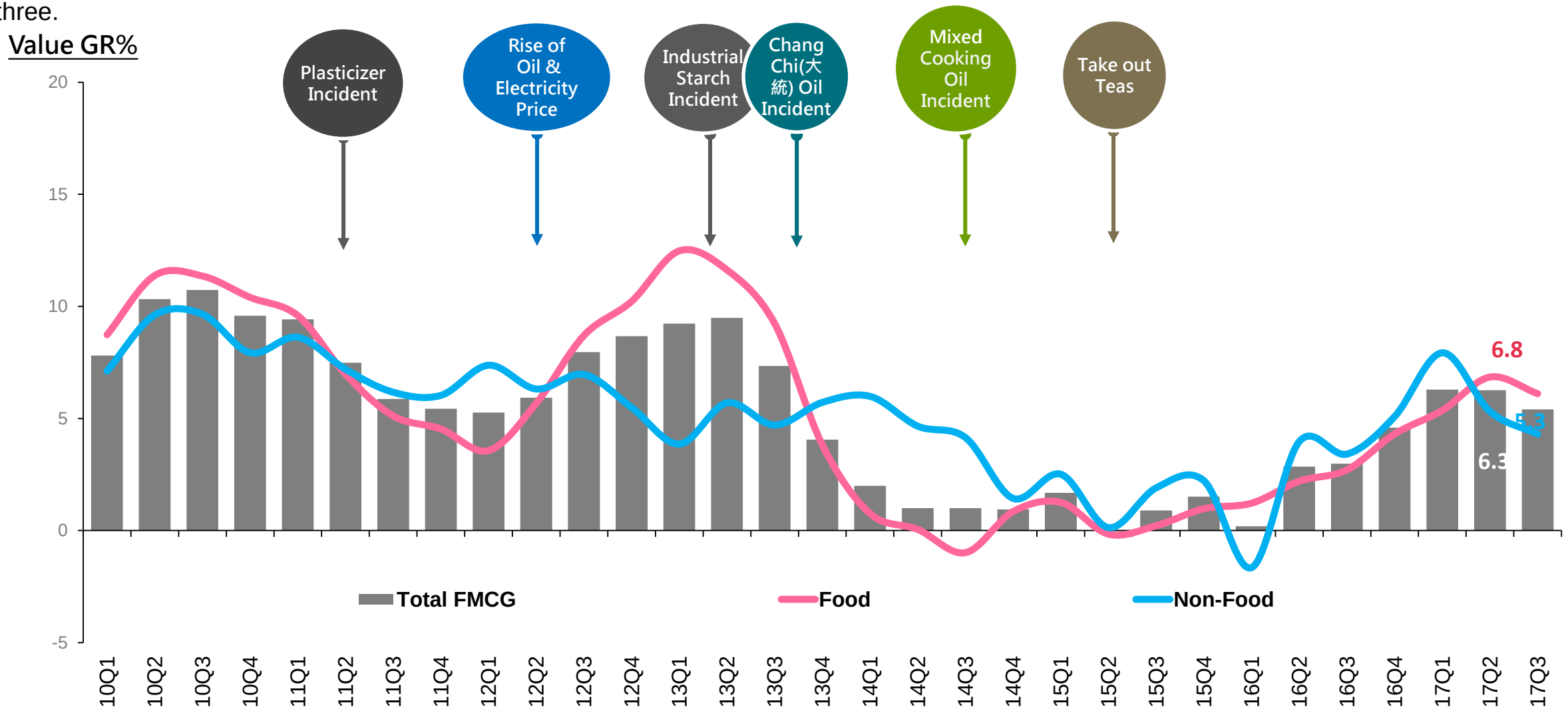




Data source：Kantar Worldpanel Household panel

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# FOOD

**Cooing related**

Fast-cooked noodles,
Cooking oil, Seasoning sauce

**Healthi-ness**

Health Food
(Balance, Bone, Energy)

**Happy Life**

Ice, Candy,
RTD Coffee, Ground Coffee

Data source：Kantar Worldpanel Household panel

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# NON FOOD

**Beauty**

Makeup, Shampoo

**Oral care**

Toothpaste, Toothbrush, Mouthwash, Dental Floss

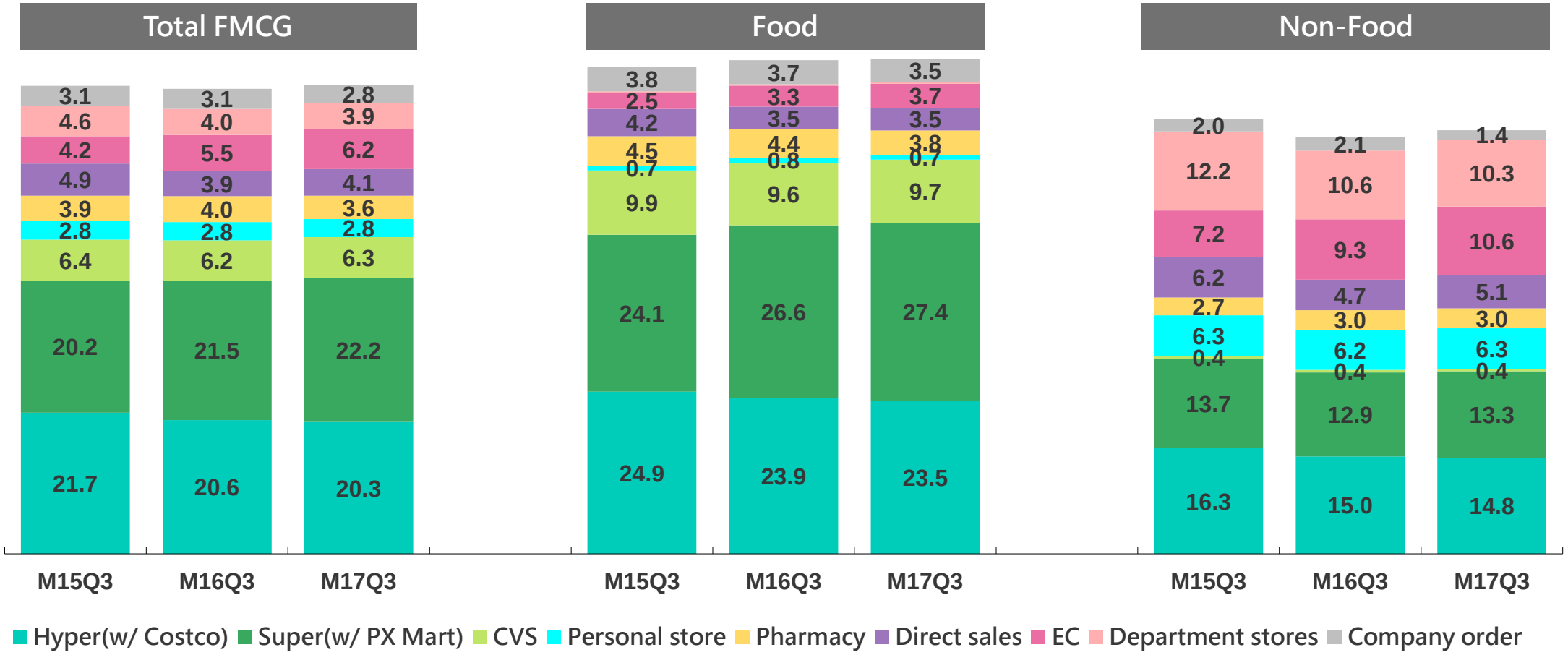
**Campaign**

Laundry Detergent, Interfold Tissue

Data source：Kantar Worldpanel Household panel

## Main channel performance in market– sales value %

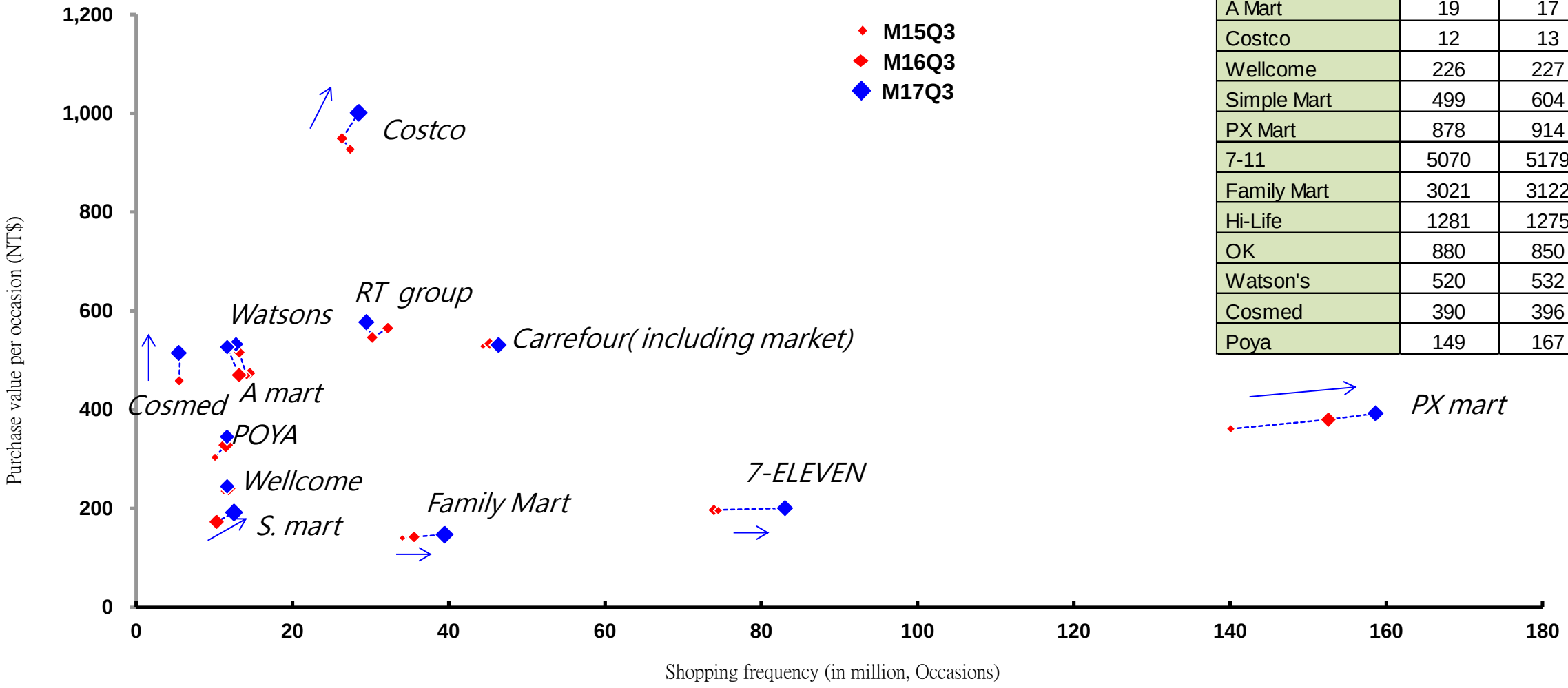
The importance of Super market(mainly from PX Mart) keep increasing, especially in cooking related categories、solid yogurt、icy and canned dessert. And the growth driver of E-commerce is from health food、cooking related、toilet paper and baby diaper.






Data source：Kantar Worldpanel Household panel

# Retailer Trend– Total FMCG market




| Store# | 2016-Sep | 2017-Sep | GR% |
|---|---|---|---|
| C4 (incl. Market) | 90 | 104 | 16% |
| Carrefour | 65 | 64 | -2% |
| Market | 25 | 40 | 60% |
| RT Group | 24 | 22 | -8% |
| A Mart | 19 | 17 | -11% |
| Costco | 12 | 13 | 8% |
| Wellcome | 226 | 227 | 0% |
| Simple Mart | 499 | 604 | 21% |
| PX Mart | 878 | 914 | 4% |
| 7-11 | 5070 | 5179 | 2% |
| Family Mart | 3021 | 3122 | 3% |
| Hi-Life | 1281 | 1275 | 0% |
| OK | 880 | 850 | -3% |
| Watson's | 520 | 532 | 2% |
| Cosmed | 390 | 396 | 2% |
| Poya | 149 | 167 | 12% |



Data source：Kantar Worldpanel Household panel