KANTAR WORLDPANEL

Consumer Insights

ASIA Q3 2017

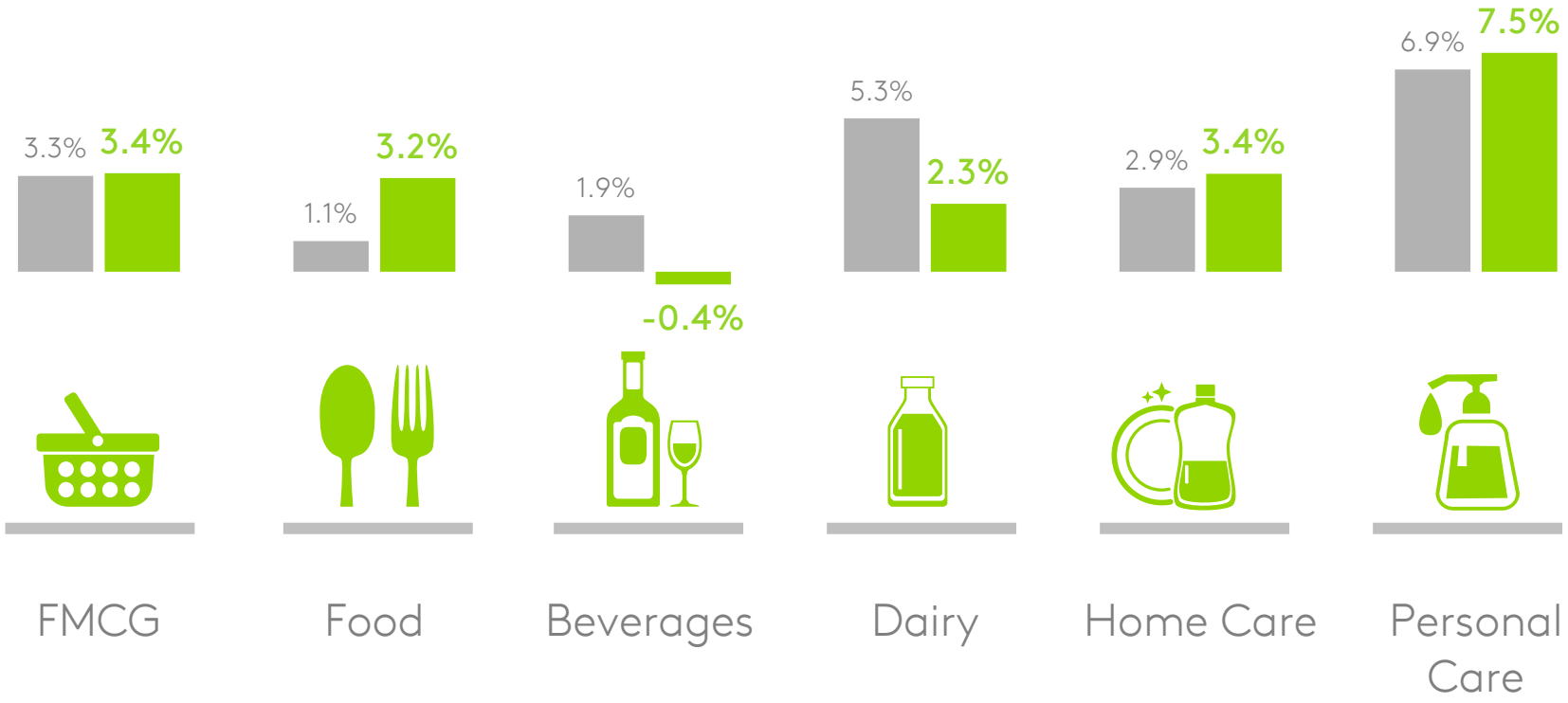
Q3 2017 | SUMMARY ASIA

	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	5.4	4.0	5.9	-5.9	9.3	-0.1	0.3	1.9	5.2	4.7
Food	1.6	8.2	3.3	6.0	-6.8	10.9	1.1	3.8	4.3	6.7	-0.9
Beverages	-1.3	4.4	4.1	2.6	-3.1	1.9	-3.7	-6.2	-3.2	9.8	7.8
Dairy	2.9	5.2	0.3	12.5	-5.6	6.5	-3.0	-0.7	3.1	-1.8	4.4
Home Care	2.3	8.8	3.1	7.6	-8.0	4.7	0.7	3.1	3.4	8.7	10.1
Personal Care	8.5	3.4	7.2	5.4	-9.2	18.2	2.3	0.7	0.3	10.4	10.5

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

% Value Change FMCG – MAT Q3 2017 vs. Year Ago

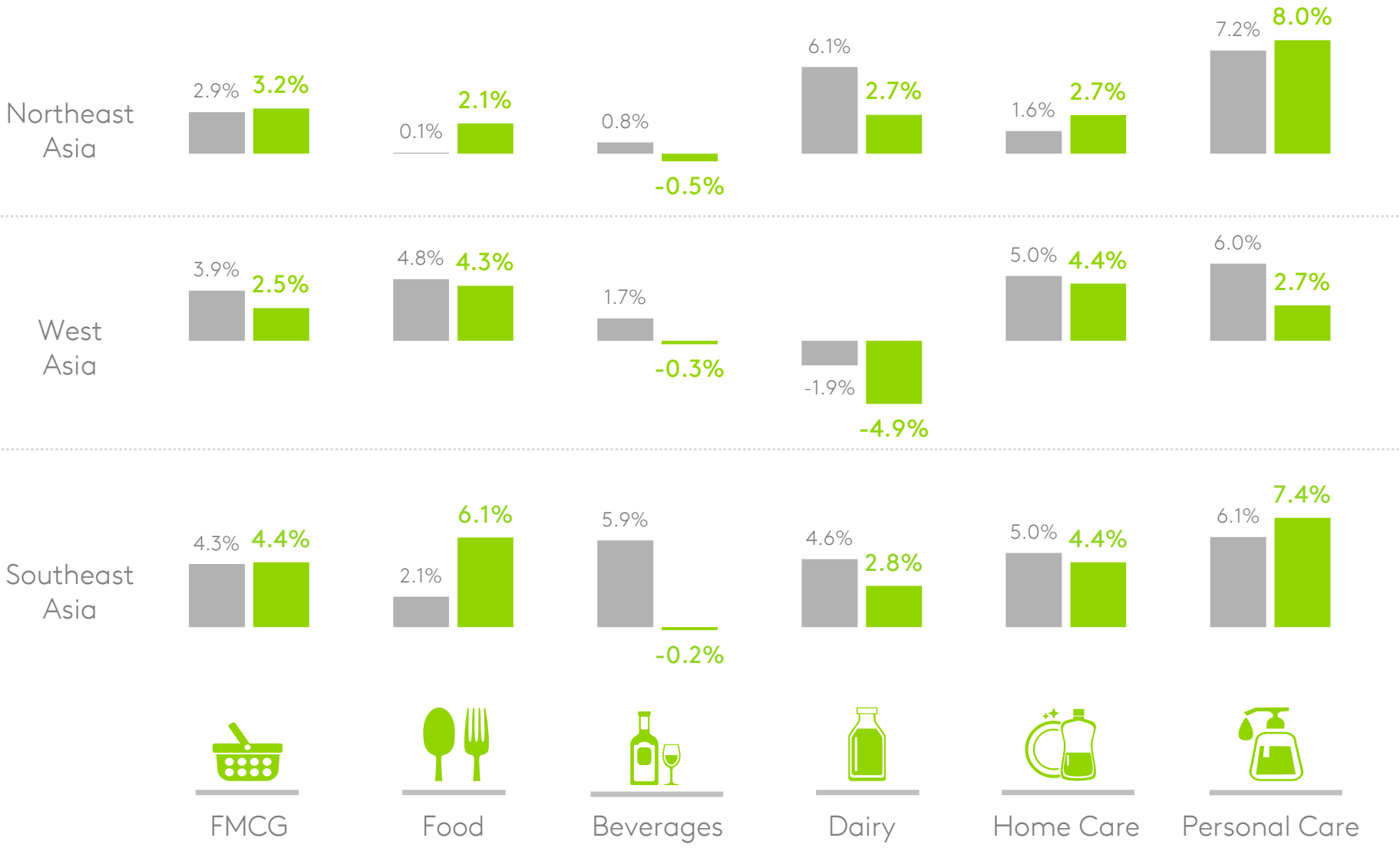
FMCG GROWTH IN ASIA : YOY



ASIA / MAT – VALUE SPEND GROWTH

Q3'16 vs Q3'15 Q3'17 vs Q3'16

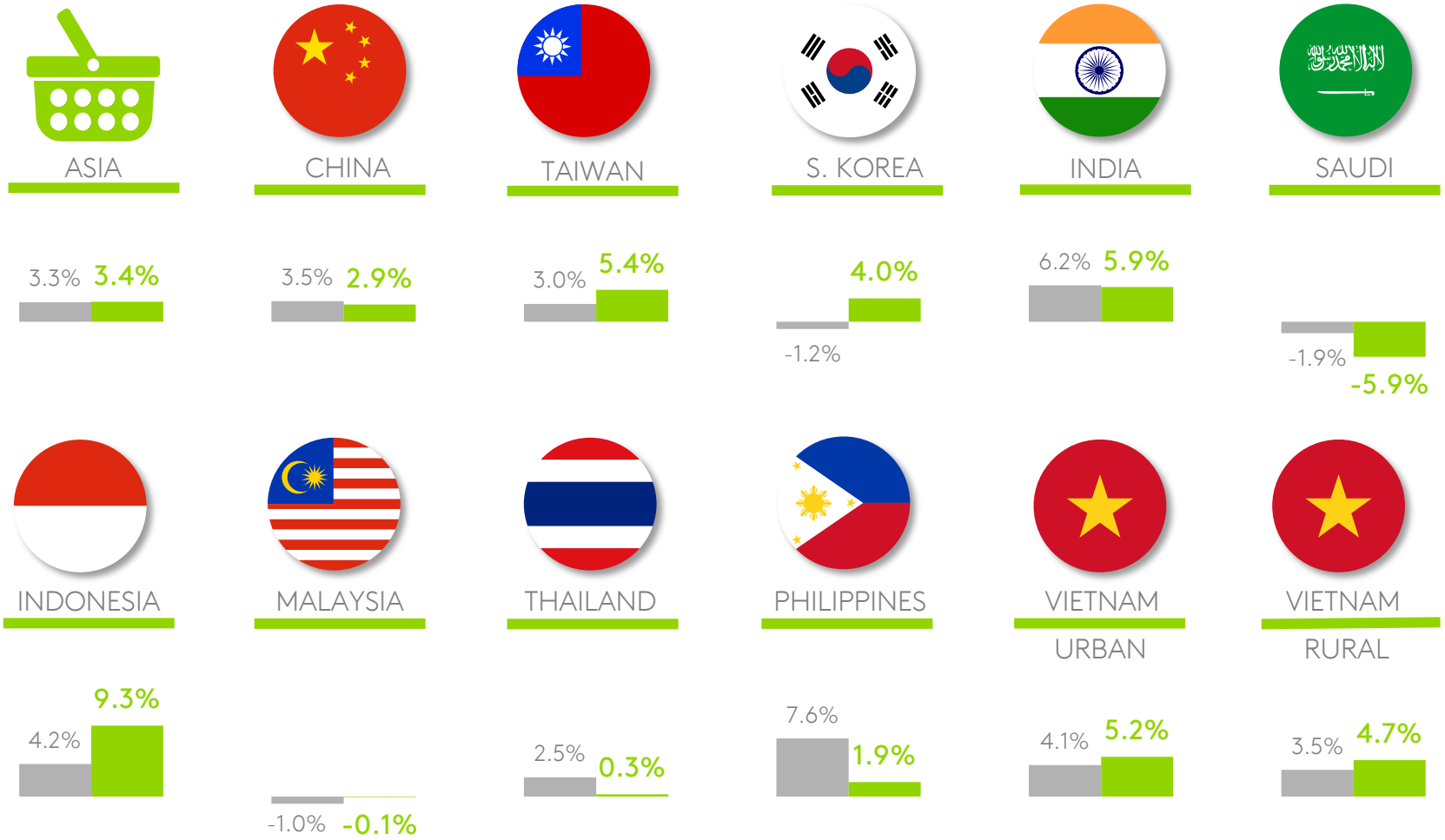
FMCG GROWTH IN ASIA : YOY



ASIA / MAT – VALUE SPEND GROWTH

■ Q3'16 vs Q3'15 ■ Q3'17 vs Q3'16

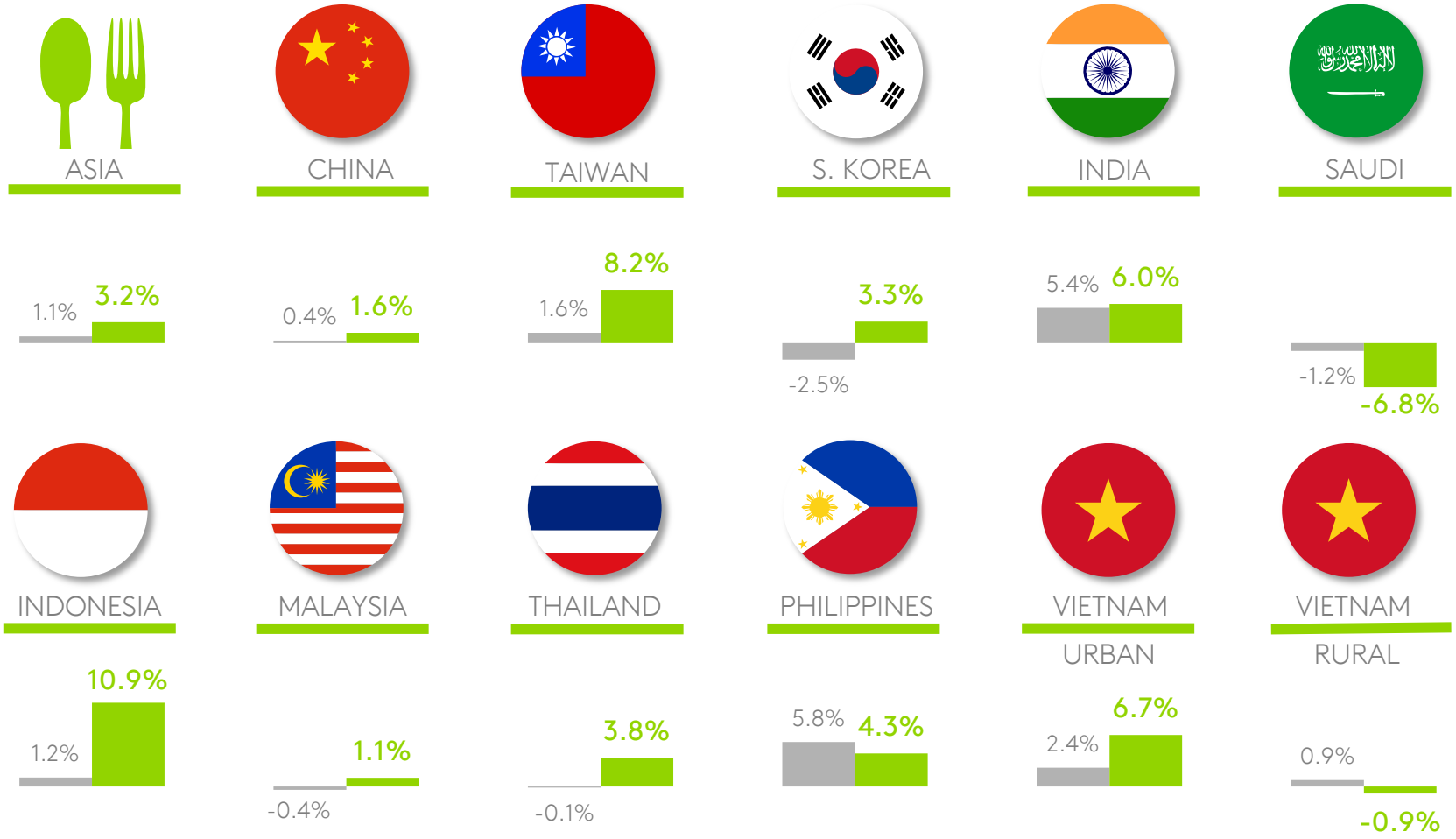
FMCG: Overall market was stable; Indonesia the best performer among all other countries, followed by India and Taiwan



ASIA / MAT Q3 2017 – Value Growth FMCG

Q3'16 vs Q3'15 Q3'17 vs Q3'16

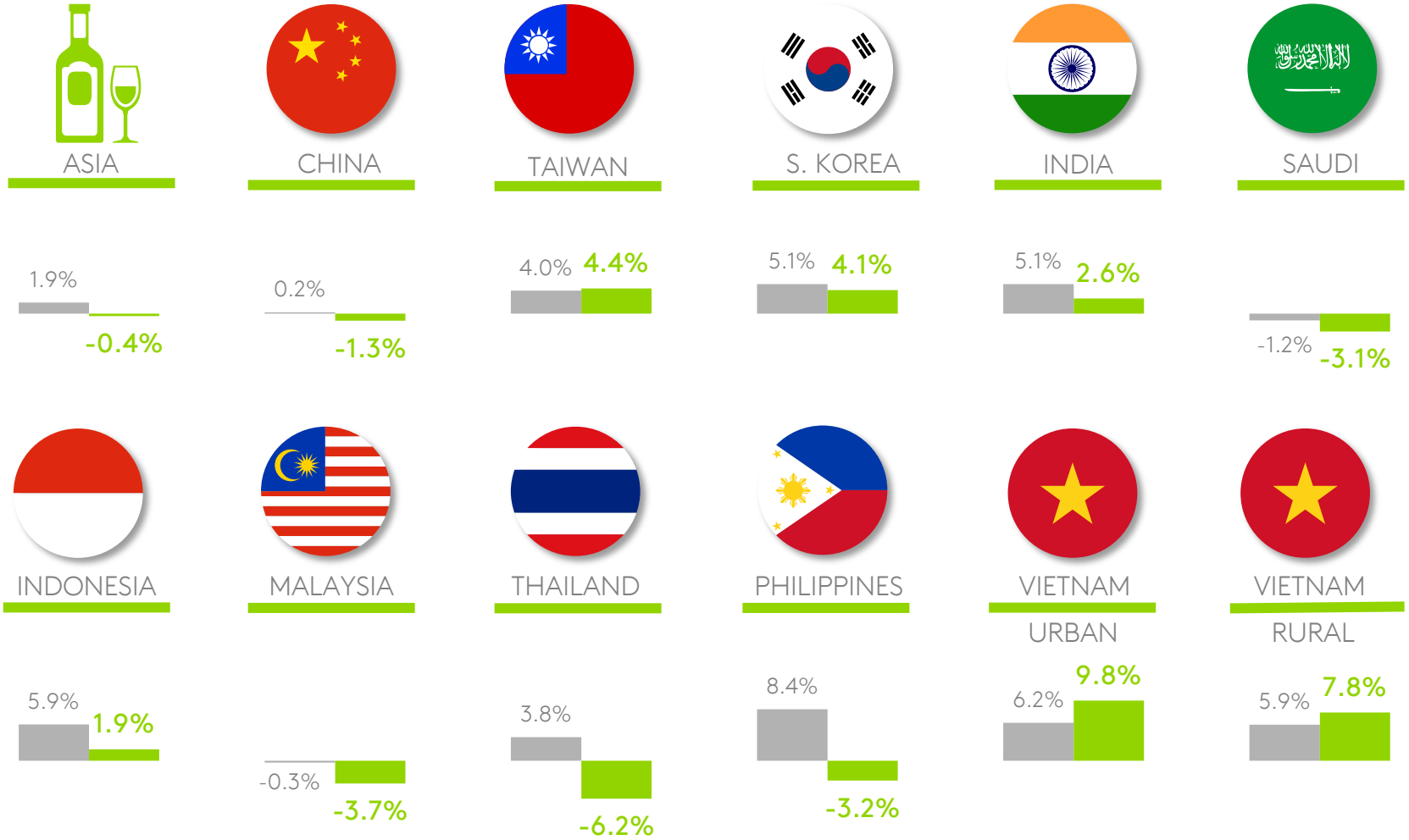
FOOD: Increased consumer spending in Food sector leads to overall value growth in Asia



ASIA / MAT Q3 2017 – Value Growth FOOD

Q3'16 vs Q3'15 Q3'17 vs Q3'16

BEVERAGES: More innovation required for continued growth, as seen in Taiwan.



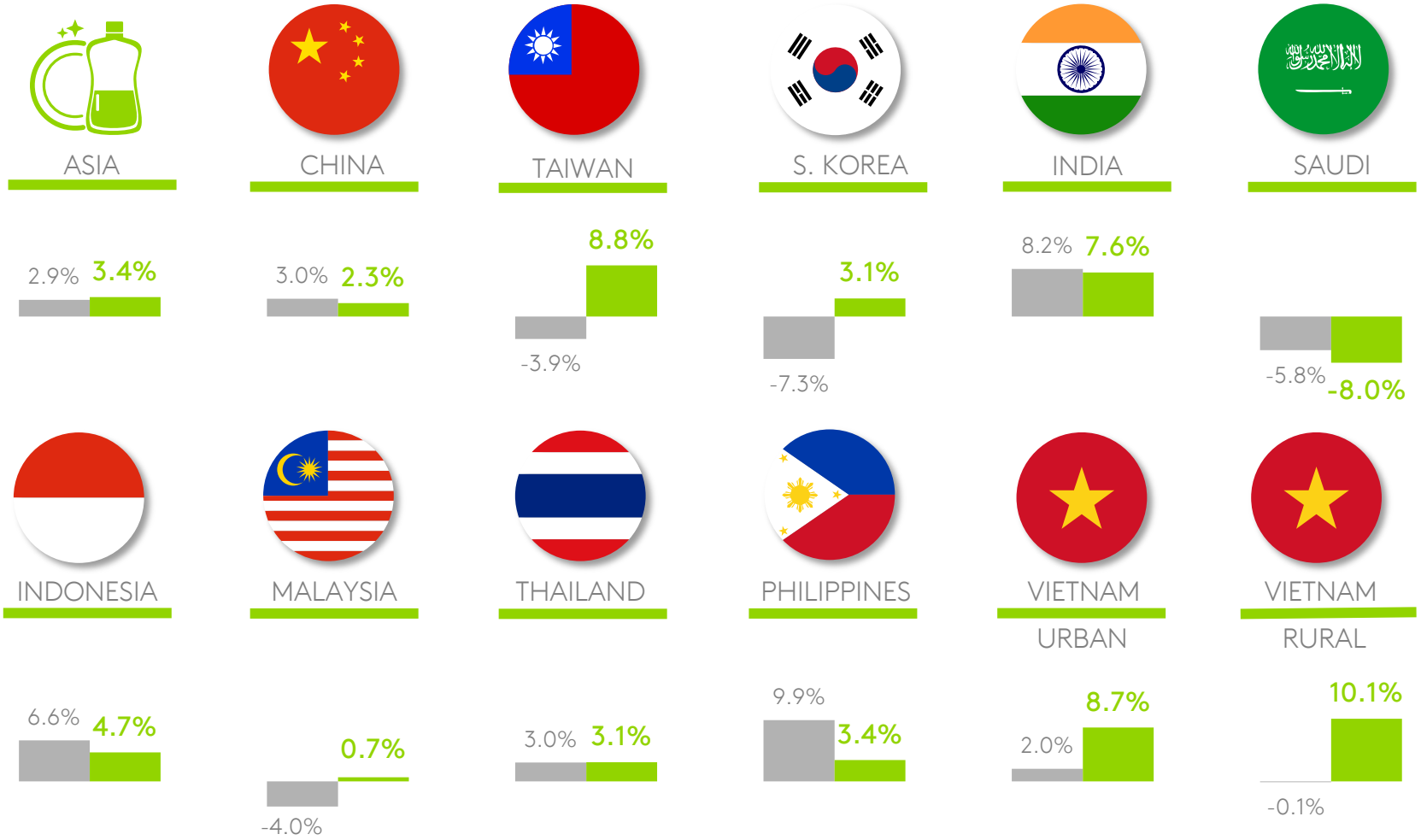
ASIA / MAT Q3 2017 – Value Growth BEVERAGES

Q3'16 vs Q3'15 Q3'17 vs Q3'16

DAIRY: India is the star performer in this category – healthy and nutritious are the tag attached with dairy product

ASIA / MAT Q3 2017 – Value Growth DAIRY

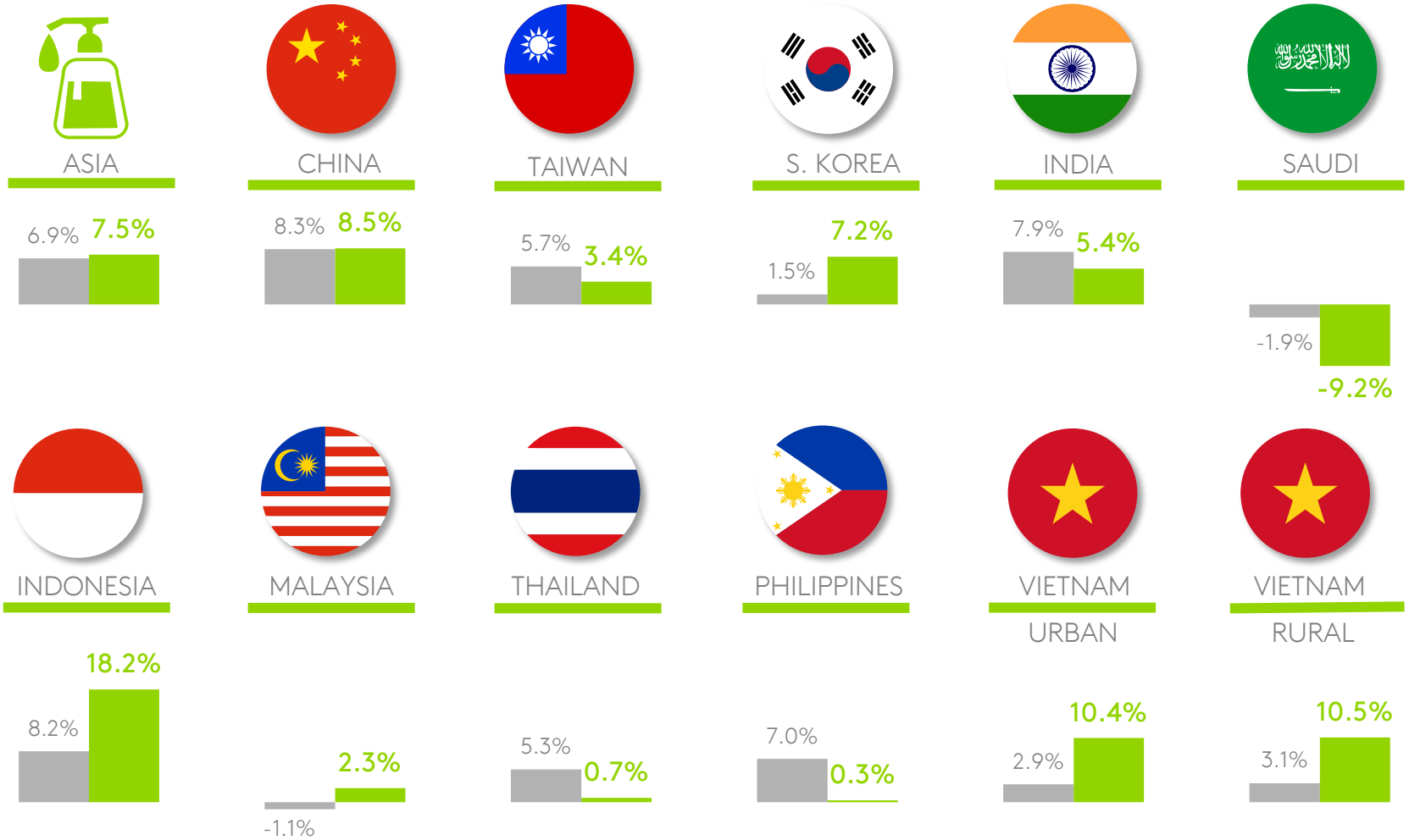
HOME CARE: Taiwan, Vietnam and India posted stellar performance in this category – hygiene is one of the factor leading this growth



ASIA / MAT Q3 2017 – Value Growth HOME CARE

Q3'16 vs Q3'15 Q3'17 vs Q3'16

PERSONAL CARE: Still the best performing category as consumers focus on self-image and cleanliness



ASIA / MAT Q3 2017 – Value Growth PERSONAL CARE

Q3'16 vs Q3'15 Q3'17 vs Q3'16

MAT Q3 2017 | SUMMARY ASIA

CHINA

#SolidGrowth Chi
economic growth
FMCG grew 2.9%
#E-Commerce 58
FMCG products th
the sign of strengt
#StableDemand F
main driver for FM
or volume. This ca
channel as well.

S.KOREA

#InHighGear Korea eco
seven-year high in Q3.
with FMCG market valu
#KidultTrend Offline re
trend as it is growing in
its infancy stage but exp
#Catch1-2HHs! Manufa
including FMCG are dev
products, customized se
target small households
population.

SAUDI ARABIA

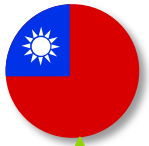
#ToughEconomic
lesser for the overc
declining now acro
#CautiousShoppe
groups & nationali
conscious choice o
#RightPromotion
promotions leading
right promotion str
key to arresting th

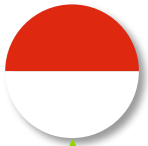
MALAYSIA

#Optimisti
to climb sir
market sen
#FMCG Re
recover. Co
essential co
#Convenie
continues t
modern tro
and person

PHILIPPINES

#UpUpUp Philippines' GDP growth of 7.5% is still on track given strong consumption and resurgence of manufacturing.
#HairConscious There seems to be a clamor for healthy hair as hair treatments aggressively grow in reach and consumption.
#QuickAndRich There is sign of growing demand for quicker food preparation and richer taste as more households are buying semi-processed meat, liquid seasoning and mayonnaise/salad dressings.





TAIWAN

#SlowDown After valley low in
was clear since 16H2. A recess
ranging from GDP, stock mark
#QualityLife Consumer needs
increased, especially in non-fo
detergent, shampoo, and toile
#NPD Innovation Beverage m
by bubble tea stands and CVS
beverages strived to grow by lo
innovations, introducing new fl
materials.

INDIA

#StructuralReforms Th
seen major structural ch
due to demonetisation
implementation of Goo
(GST) on July 01, 2017.
#DairyOnTheRise Value
observed across all the
Dairy sector growing th
#FastGrowingBrand Pa
expand its portfolio and
all markets, mainly driv

INDONESI

#SteadyG
steady at
governme
#Confider
hold consu
consumers
spending
categories
#Premium
improved
result of b

THAILAND

#Spending
but this do
continue to
landscape.
#SeesawE
essential p
against few
#MultiCha
trade char
expansion
online are

VIETNAM

#RobustPerformance Vietnam's economy expanded 7.46% in Q3, boosted by the strong performance of export and wholesale & retail.
#ModernRetailOutpace Both big and small retail formats keep up their momentum as a result of lots of M&A deals and foreign investments in recent time.
#Hygiene&Cleanliness Impressive growth of Personal Care & Home Care is largely attributed to the rising consumers' awareness on personal needs and hygiene.

CHINA

Top 5 Categories with Positive Impact – MAT Q3'17 vs Q3'16

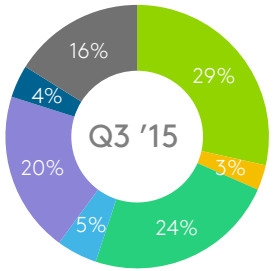
Value	Volume	Penetration
Mouthwash	Mouthwash	Mouthwash
Bleach	Wet Tissues	Kitchen Rolls
Kitchen Rolls	Bleach	Bleach
Intimate Hygiene	Kitchen Rolls	Make Up
Nutrient Solid Drinks	Mint Candy	Hand Wash

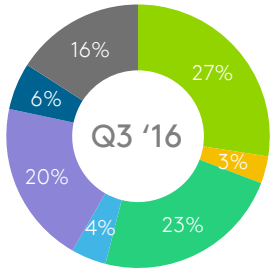
%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

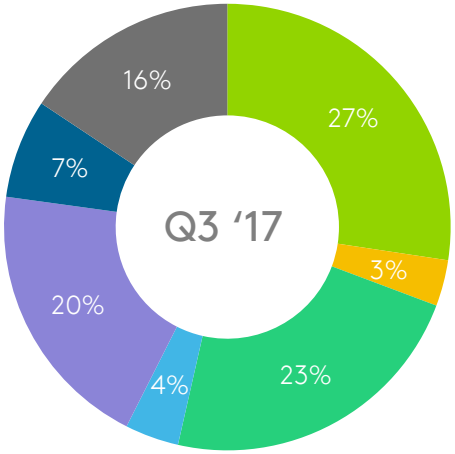
MAT	MAT Q4'16 VS year ago	MAT Q1'17 VS year ago	MAT Q2'17 VS year ago	MAT Q3'17 VS year ago
Total	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%
Low Income	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%
Mid Income	Growth ≤ -0.5%	Growth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

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

Channel Importance - %Value

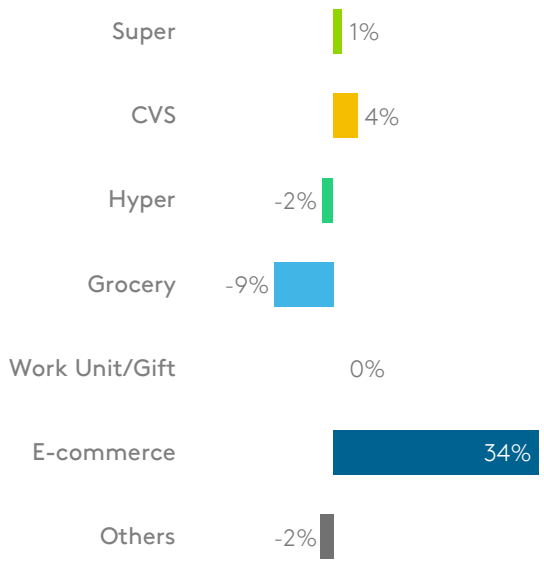






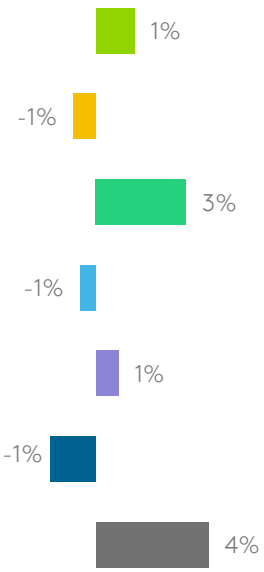
Super | CVS | Hyper | Grocery | Work unit/ Gift | E-commerce | Others

Shopping Occasions



Spend/Trip

MAT Q3'17 v Q3'16



TAIWAN

Top 5 Categories with Positive Impact – MAT Q3'17 vs Q3'16

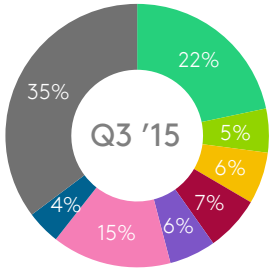
Value	Volume	Penetration
Multi Purpose Cleaner	Multi Purpose Cleaner	Toothbrush
Razor Blades	Cooking Vinegar	Ice Cream
Peanut Butter	Peanut Butter	Liquid Detergent
Air Fresheners	Chili Sauce	Cooking Oil
Ice Cream	Razor Blades	Razor Blades

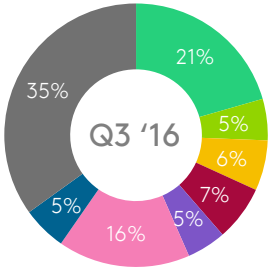
%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

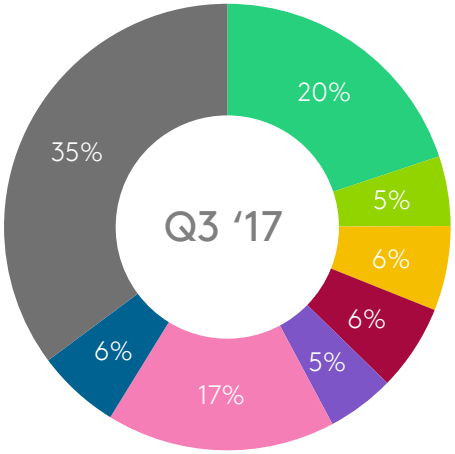
MAT	MAT Q4'16 VS year ago	MAT Q1'17 VS year ago	MAT Q2'17 VS year ago	MAT Q3'17 VS year ago
Total	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%
Low Income	Growth > 5%	Growth > 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%
Mid Income	Growth ≤ -0.5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth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

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

Channel Importance - %Value





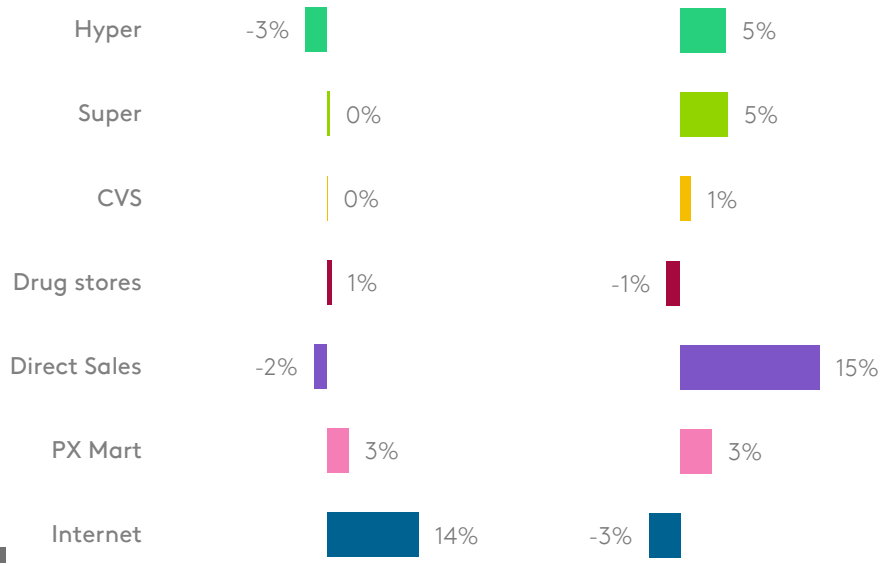


Others: gift & sample, grocery & provision, department stores, company order

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

Shopping Occasions / Spend/Trip

MAT Q3'17 v Q3'16



KOREA

Top 5 Categories with Positive Impact – MAT Q3'17 vs Q3'16

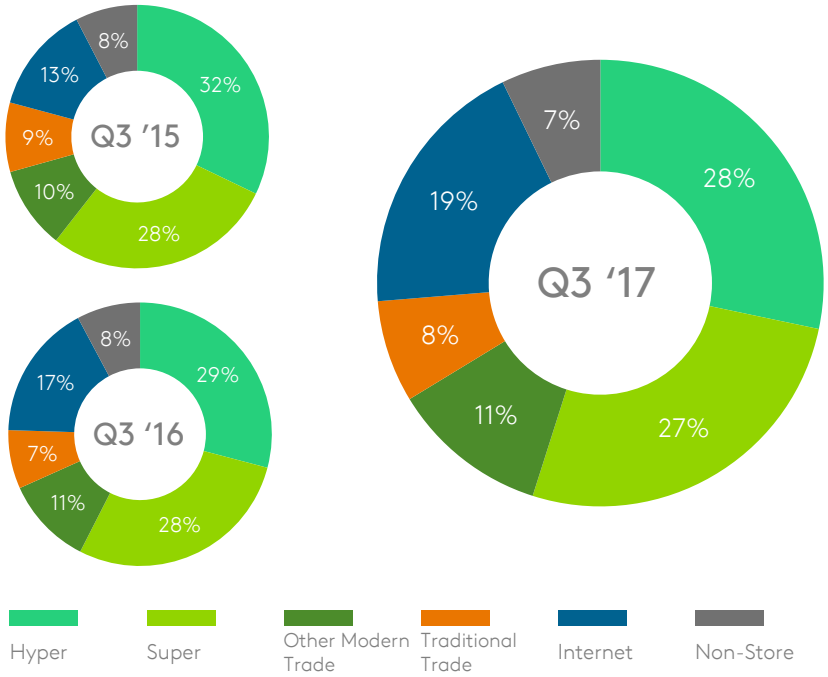
Value	Volume	Penetration
Retort	Spread	Retort
Kimchi	Multi Lip	Foundation
Spread	Foundation	Frozen Prepared Food
Foundation	Kimchi	Kimchi
Shading	Retort	Body Cleanser

%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

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

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

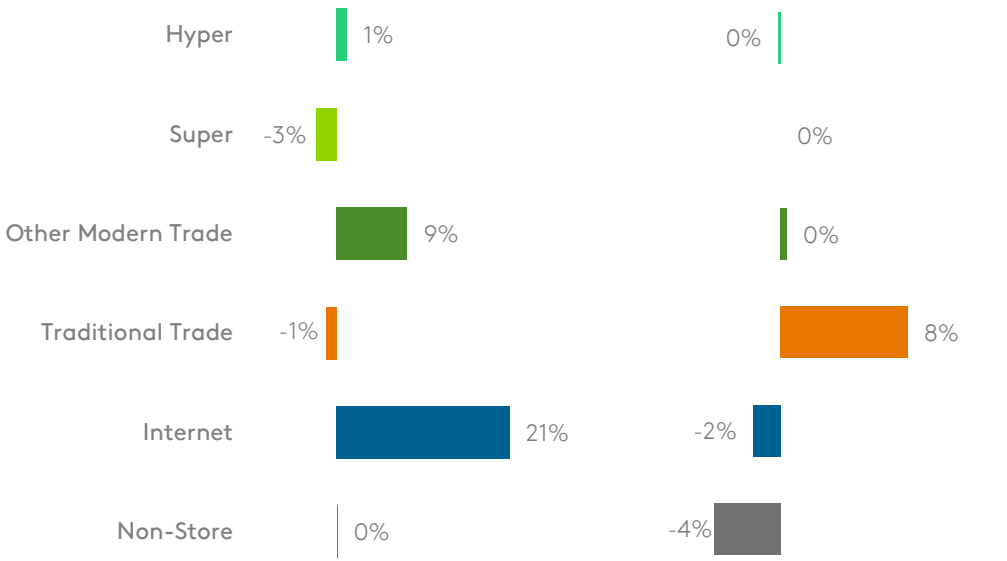
Channel Importance - %Value



Shopping Occasions

Spend/Trip

MAT Q3'17 v Q3'16



INDIA

Top 5 Categories with Positive Impact – MAT Q3'17 vs Q3'16

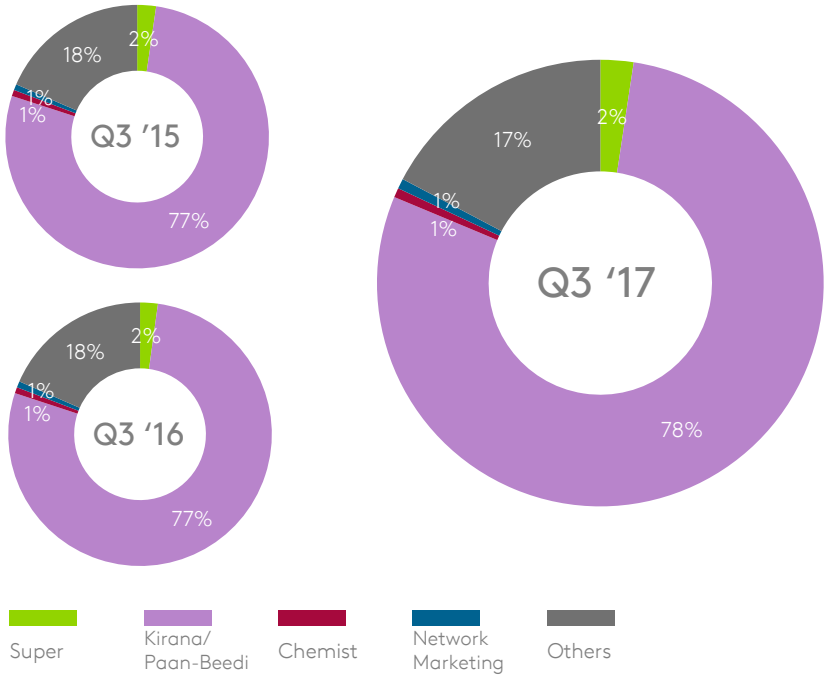
Value	Volume	Penetration
Noodle/Macaroni	Noodle/Macaroni	Toilet/Bathroom Cleaner
Toilet/Bathroom Cleaner	Toilet/Bathroom Cleaner	Noodle/Macaroni
Ice Cream/Kulfi	Ice Cream/Kulfi	Coffee
Sauces	Sauces	Floor Cleaner
Coffee	Floor Cleaners	Sauces

%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q4'16 VS year ago	MAT Q1'17 VS year ago	MAT Q2'17 VS year ago	MAT Q3'17 VS year ago
Total SEC	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%
SEC AB	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%
SEC C	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%
SEC D/E	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%

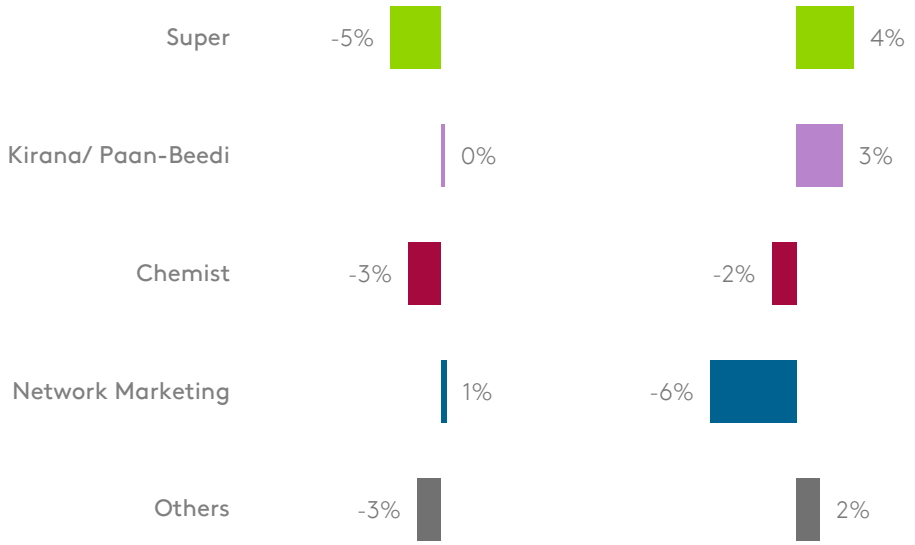
Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

Channel Importance - %Value



Shopping Occasions / Spend/Trip

MAT Q3'17 v Q3'16



SAUDI ARABIA

Top 5 Categories with Positive Impact – MAT Q3'17 vs Q3'16

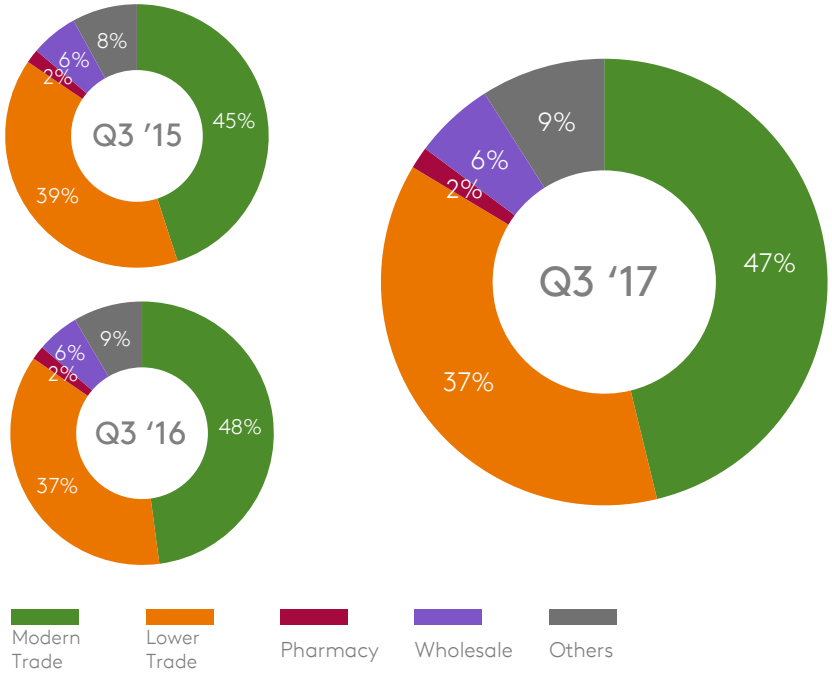
Value	Volume	Penetration
Sliced Bread	Chocolate Spreads	Chocolate Spreads
Bottled Water	Sliced Bread	UHT Flavoured Milk
Chocolate Spreads	Bottled Water	Evaporated Milk
Honey	Yoghurt (Zabadi)	Full Cream Milk Powder
Energy Drinks	UHT Flavoured Milk	Coffee

%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q4'16 VS year ago	MAT Q1'17 VS year ago	MAT Q2'17 VS year ago	MAT Q3'17 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	-0.5% < Growth ≤ 5%	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth ≤ -0.5%

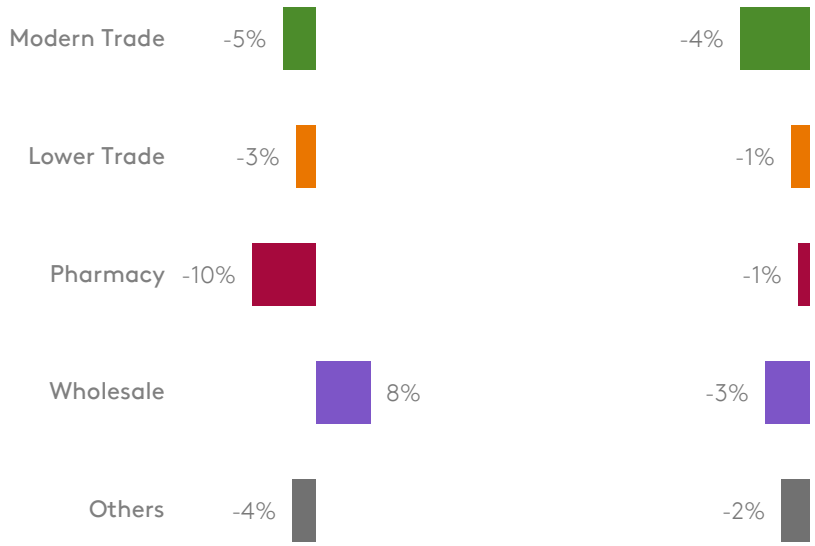
Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

Channel Importance - %Value



Shopping Occasions / Spend/Trip

MAT Q3'17 v Q3'16



INDONESIA

Top 5 Categories with Positive Impact – MAT Q3'17 vs Q3'16

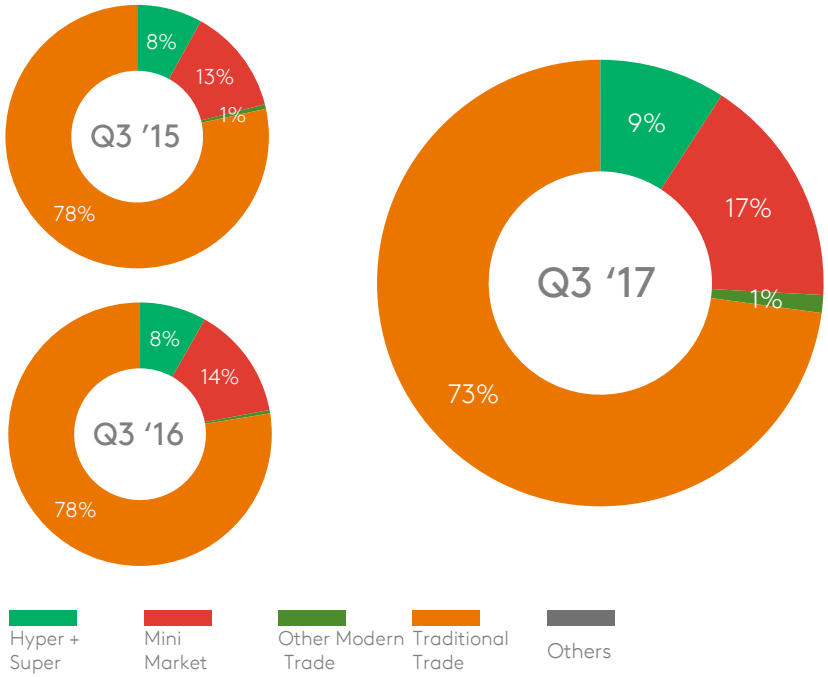
Value	Volume	Penetration
Lip Cosmetic	Lip Cosmetic	Cold Cereal/cereal bar
Potato Snack	Cold cereal/cereal bar	Lip cosmetic
Eye Cosmetic	Yoghurt Drink	Potato Snack
Hair Colorant	Eye Cosmetic	Facial Moisturizer
Snack (Excl. Potato)	Potato Snack	Facial Cosmetic

%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q4'16 VS year ago	MAT Q1'17 VS year ago	MAT Q2'17 VS year ago	MAT Q3'17 VS year ago
Total	Growth > 5%	Growth > 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%	Growth > 5%	Growth > 5%

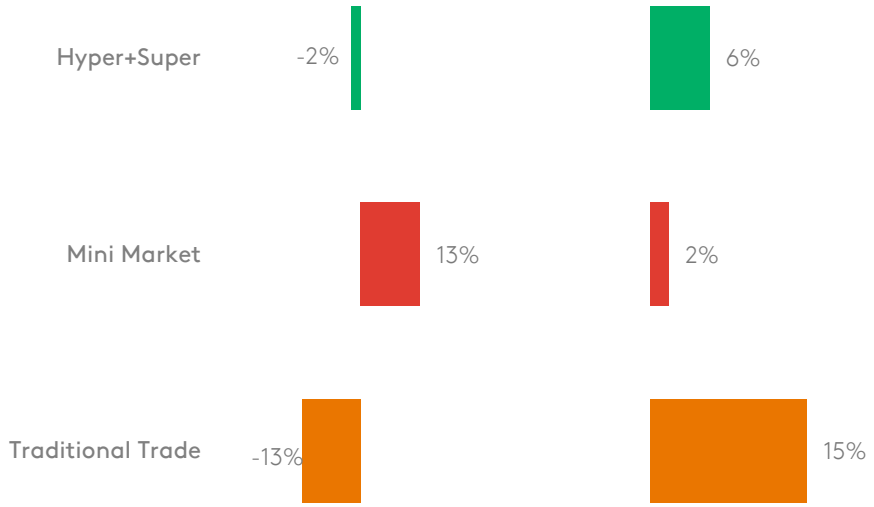
Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

Channel Importance - %Value



Shopping Occasions / Spend/Trip

MAT Q3'17 v Q3'16



MALAYSIA

Top 5 Categories with Positive Impact – MAT Q3'17 vs Q3'16

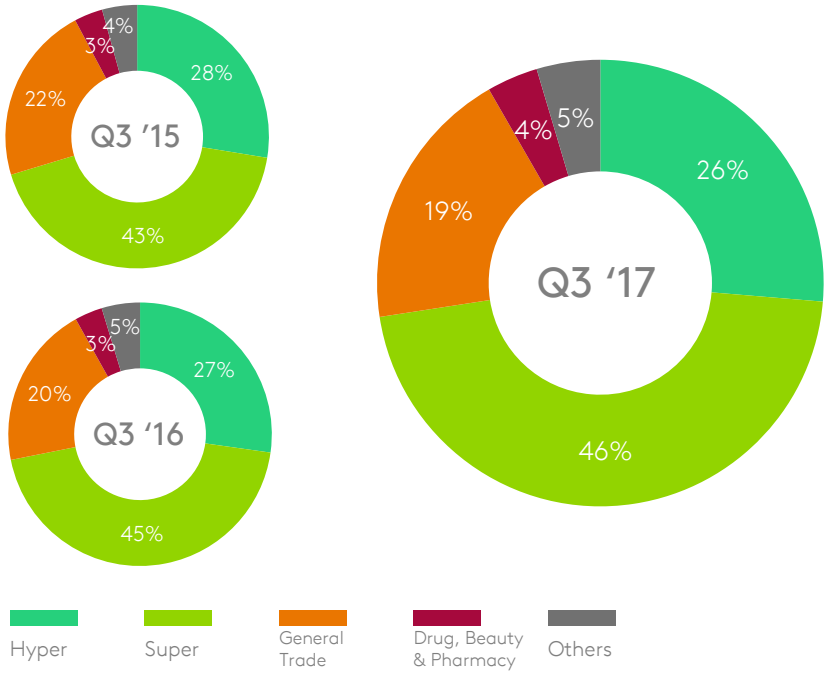
Value	Volume	Penetration
RTD Coffee	RTD Coffee	RTD Coffee
Toi/Bathr/Cleaner	Mask	Chocolate
Cosmetics	Toi/Bathr/Cleaner	One Step
Drinking Water	Hair Treatment	Coconut Milk
Belacan	Cosmetics	Flour

%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

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

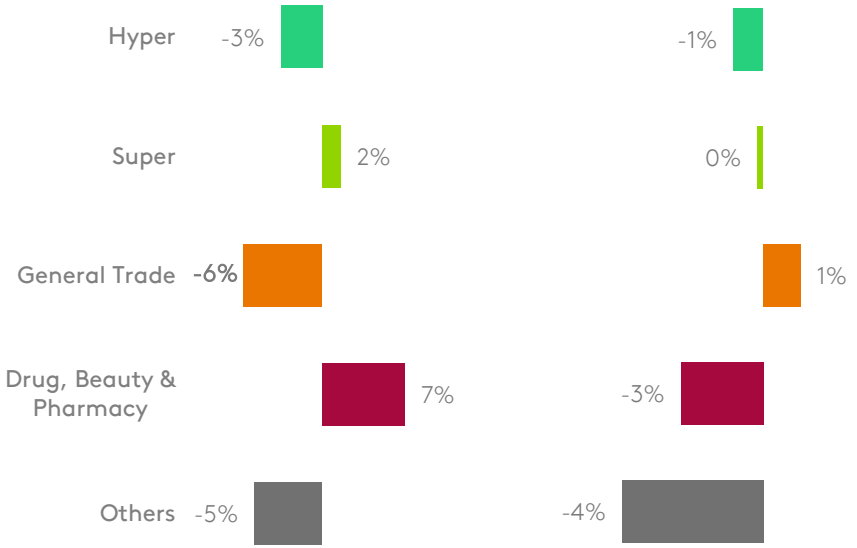
Grey: Growth ≤ -0.5% | Yellow: -0.5% < Growth ≤ 5% | Green: Growth > 5%

Channel Importance - %Value



Shopping Occasions / Spend/Trip

MAT Q3'17 v Q3'16



THAILAND

Top 5 Categories with Positive Impact – MAT Q3'17 vs Q3'16

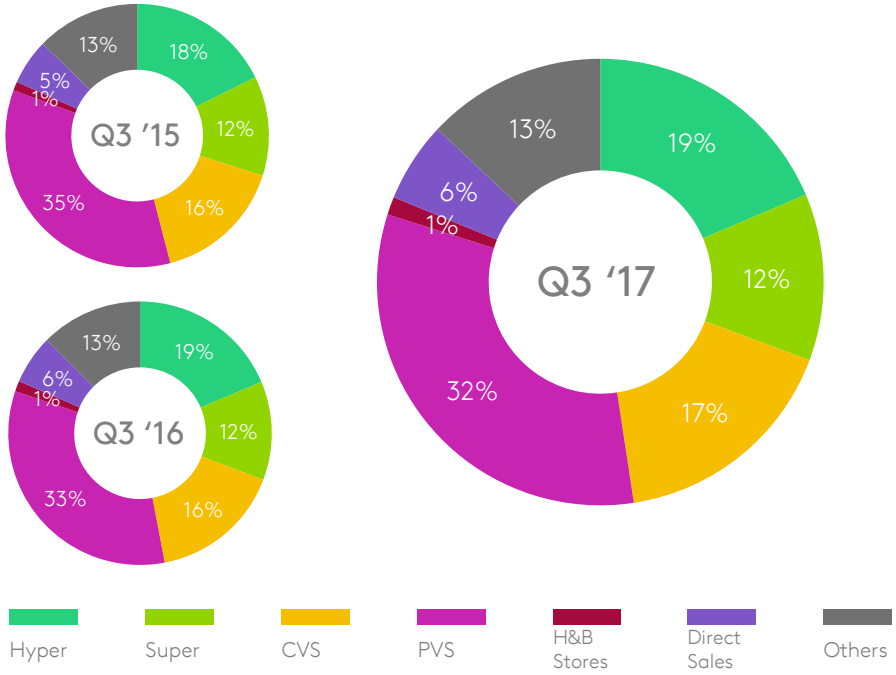
Value	Volume	Penetration
Spread	Jam	Mask
Essence of Chicken	Mask	Facial Tissue
Facial Tissue	Spread	Make Up
Jam	Sun Protection	RTD Coffee
Cooking Oil	Essence of Chicken	Rice

%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

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

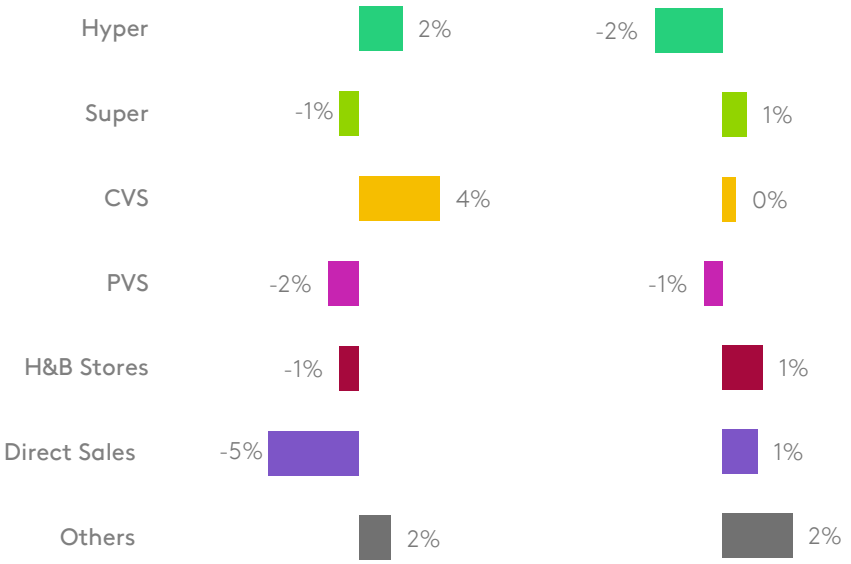
Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

Channel Importance - %Value



Shopping Occasions / Spend/Trip

MAT Q3'17 v Q3'16



PHILIPPINES

Top 5 Categories with Positive Impact – MAT Q3'17 vs Q3'16

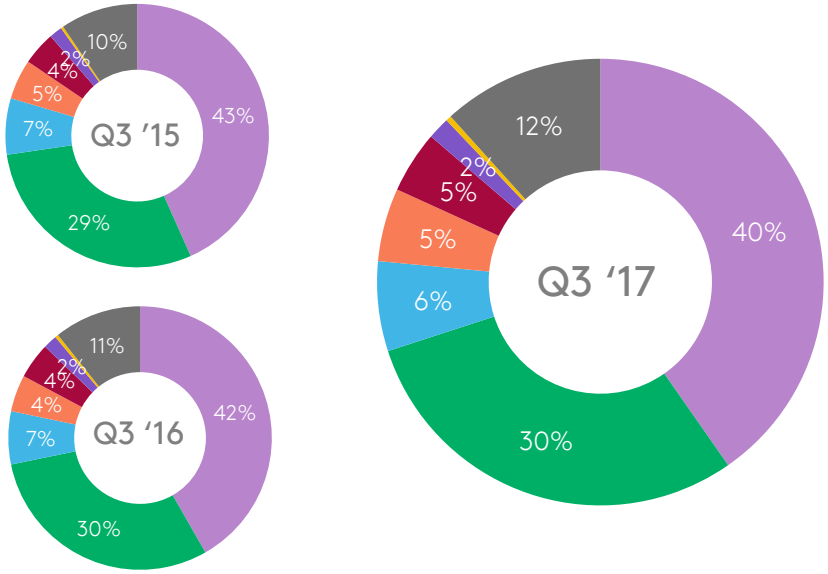
Value	Volume	Penetration
Hair Treatment	Hair Colorant	Hair Treatment
Chocolate	Hair Treatment	Mouthwash
Semi-Processed Meat	Semi-Processed Meat	Liquid Seasoning
Liquid Detergent	Baby Food	Mayonnaise/Salad Dr.
Instant Pasta	Scouring Pads	Semi-Processed Meat

%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q4'16 VS year ago	MAT Q1'17 VS year ago	MAT Q2'17 VS year ago	MAT Q3'17 VS year ago
Total	Yellow	Yellow	Yellow	Yellow
SEC E	Yellow	Yellow	Yellow	Yellow
SEC D	Yellow	Yellow	Yellow	Yellow
SEC ABC	Grey	Yellow	Yellow	Grey

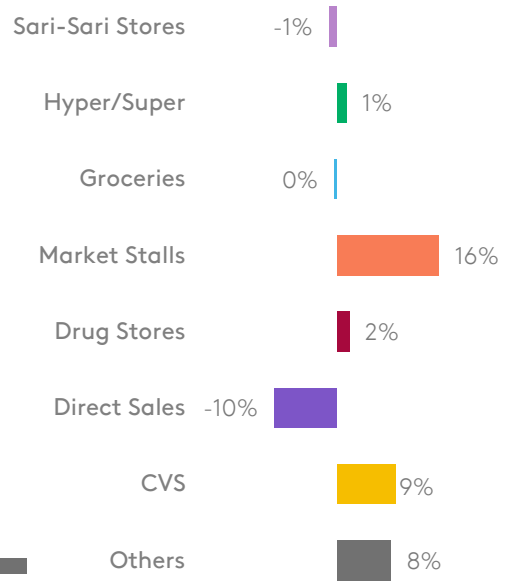
Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

Channel Importance - %Value



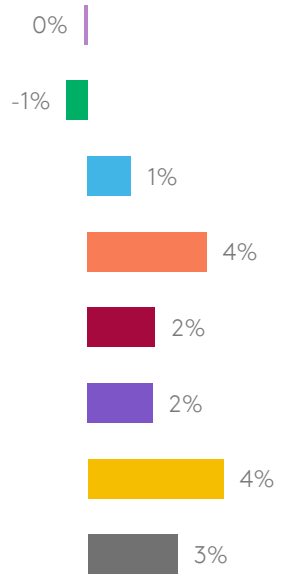
Sari-Sari Stores | Hyper/ Super | Groceries | Market Stalls | Drug Stores | Direct Sales | CVS | Others

Shopping Occasions



Spend/Trip

MAT Q3'17 v Q3'16



VIETNAM URBAN

Top 5 Categories with Positive Impact – MAT Q3'17 vs Q3'16

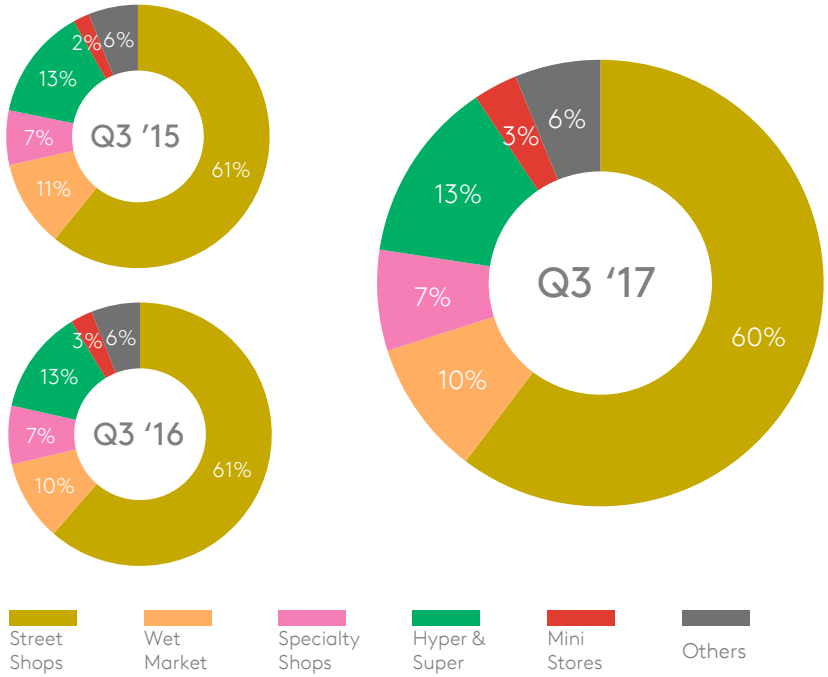
Value	Volume	Penetration
Sun Protection	Sun Protection	Ketchup/Tomato Sauce
RTD GUM	RTD GUM	Mayonnaise
Air Freshener	Liquid Detergent	Instant Tea
Hair Colorant	Functional Drinking Yogurt	Cakes
Lipstick	Mayonnaise	Rice Soup

%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

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

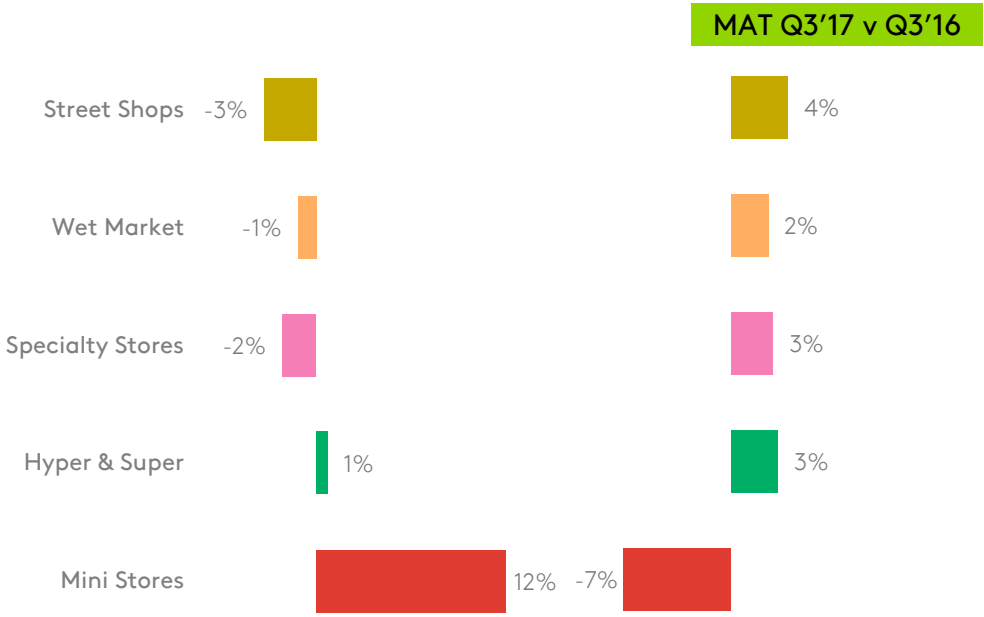
Grey: Growth ≤ -0.5% | Yellow: -0.5% < Growth ≤ 5% | Green: Growth > 5%

Channel Importance - %Value



Shopping Occasions

Spend/Trip



VIETNAM RURAL

Top 5 Categories with Positive Impact – MAT Q3'17 vs Q3'16

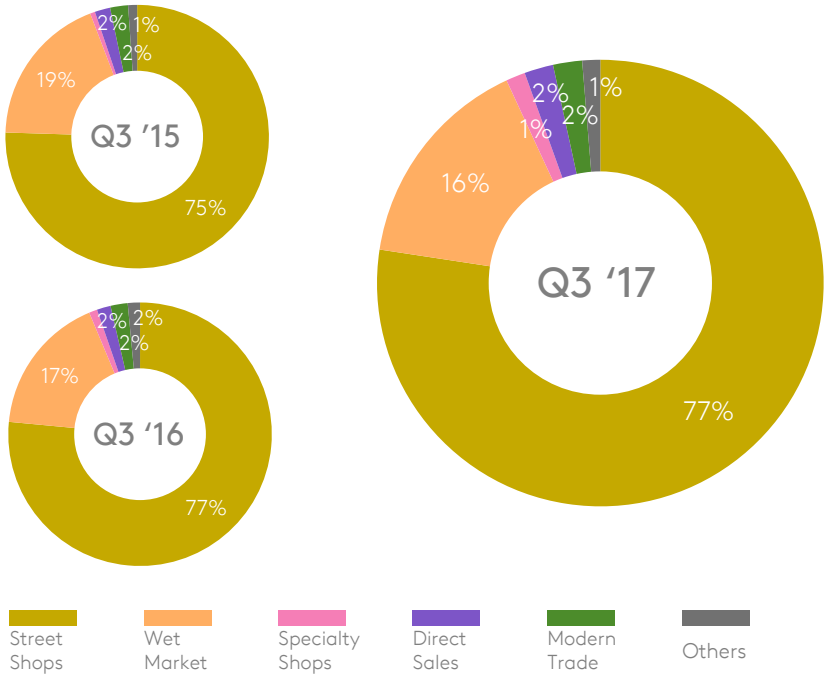
Value	Volume	Penetration
Liquid Detergent	Liquid Detergent	Liquid Detergent
RTD GUM	RTD GUM	Biscuits
Tonic Food Drink	Tonic Food Drink	Loose Leaf Tea
Adult Milk Powder	Deodorant	CSD
Facial Cleanser	Shaving Products	Insecticide

%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q4'16 VS year ago	MAT Q1'17 VS year ago	MAT Q2'17 VS year ago	MAT Q3'17 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%

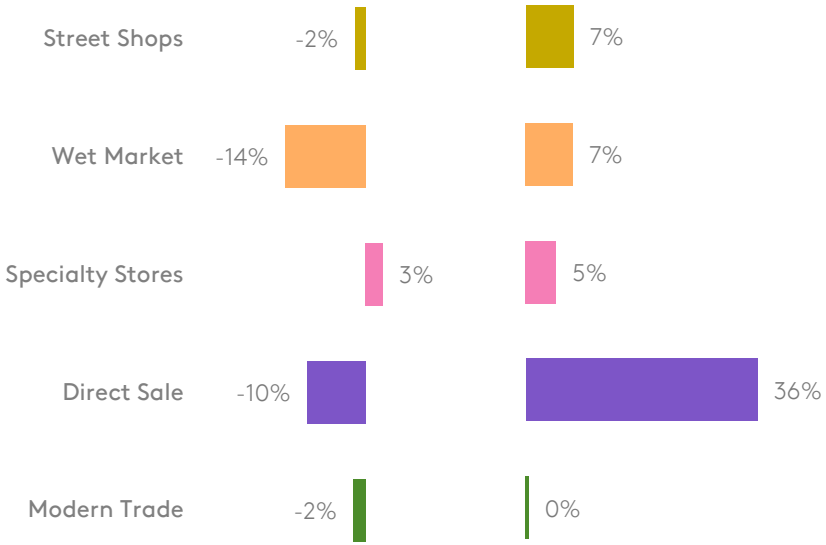
Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

Channel Importance - %Value



Shopping Occasions / Spend/Trip

MAT Q3'17 v Q3'16



KANTAR WORLDPANEL