KANTAR WORLDPANEL

Consumer Insights

ASIA Q4 2017

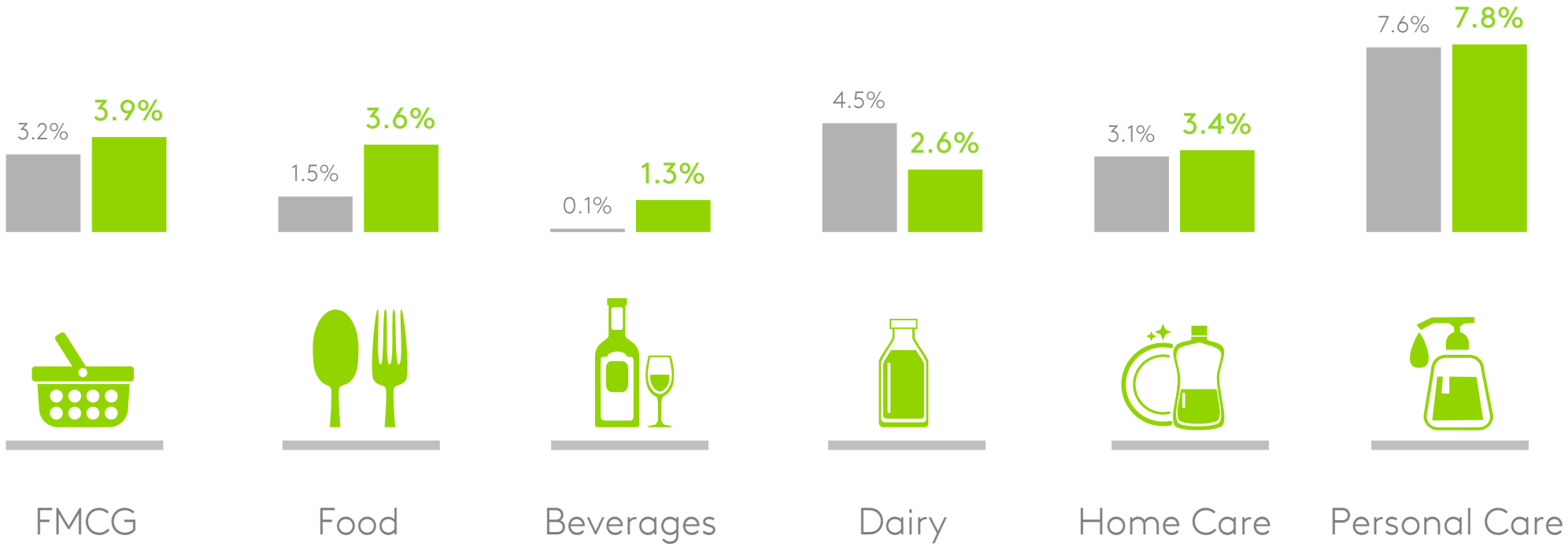
Q4 2017 | SUMMARY ASIA

	Northeast Asia			West Asia		Southeast Asia					
	China	Taiwan	South Korea	India (Urban)	Saudi Arabia	Indonesia	Malaysia	Thailand	Philippines	Vietnam (Urban)	Vietnam (Rural)
FMCG Total	4.3	3.9	3.9	6.2	-6.3	7.6	0.9	-0.4	1.1	5.3	4.4
Food	2.9	6.2	4.3	5.9	-8.0	7.9	3.1	2.6	2.9	5.6	-1.6
Beverages	0.9	4.4	6.3	3.5	-2.9	5.5	-3.7	-6.6	-3.9	12.7	7.6
Dairy	4.3	6.9	-4.9	22.8	-5.7	5.9	-1.1	-5.7	3.1	-3.5	2.7
Home Care	2.2	6.4	4.9	8.2	-7.3	3.6	0.6	4.2	3.1	8.4	10.7
Personal Care	9.5	0.5	6.5	6.3	-10.9	12.6	1.3	2.7	-0.6	12.6	12.6

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

% Value Change FMCG – MAT Q4 2017 vs. Year Ago

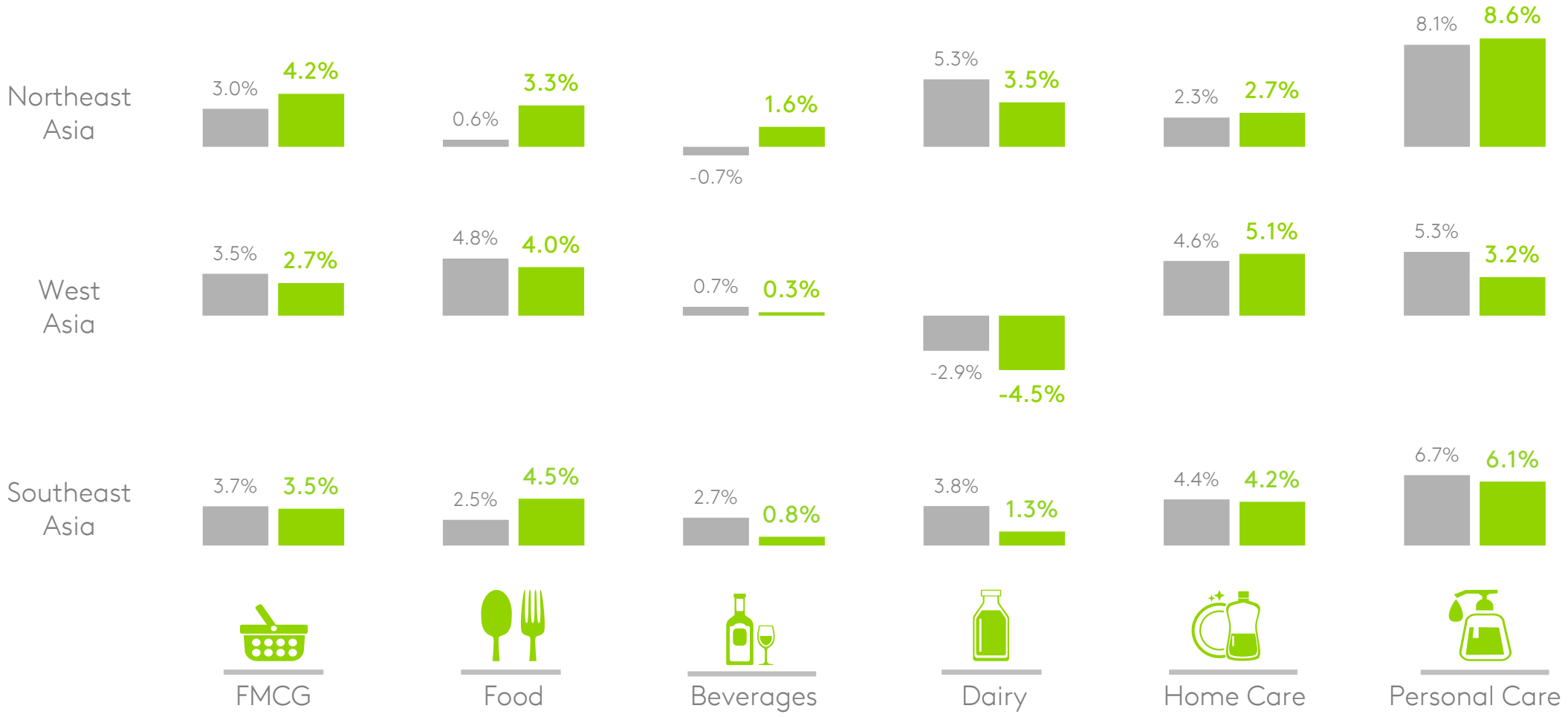
FMCG GROWTH IN ASIA : YOY



ASIA / MAT – VALUE SPEND GROWTH

Q4'16 vs Q4'15 Q4'17 vs Q4'16

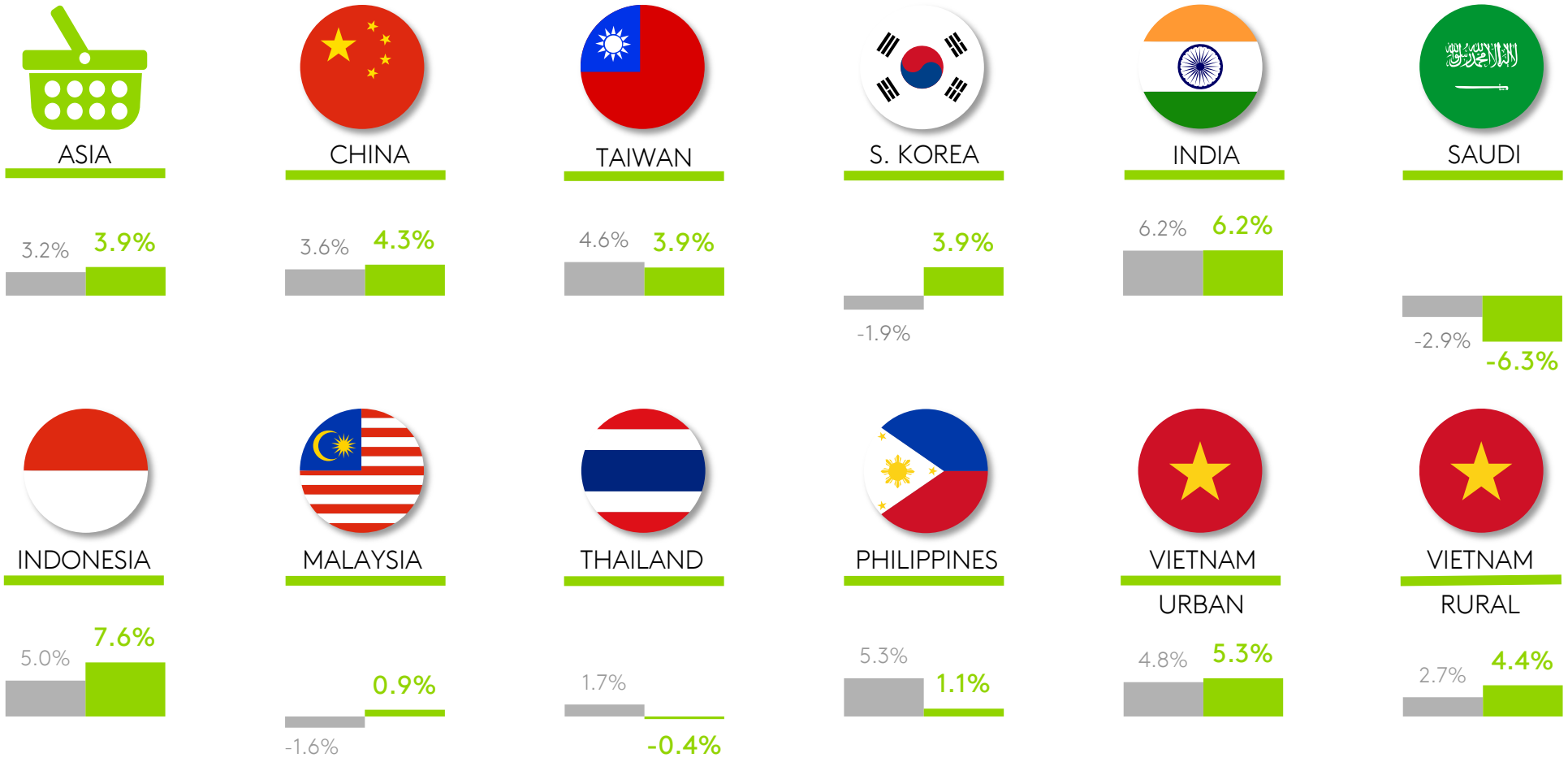
FMCG GROWTH IN ASIA : YOY



ASIA / MAT – VALUE SPEND GROWTH

■ Q4'16 vs Q4'15 ■ Q4'17 vs Q4'16

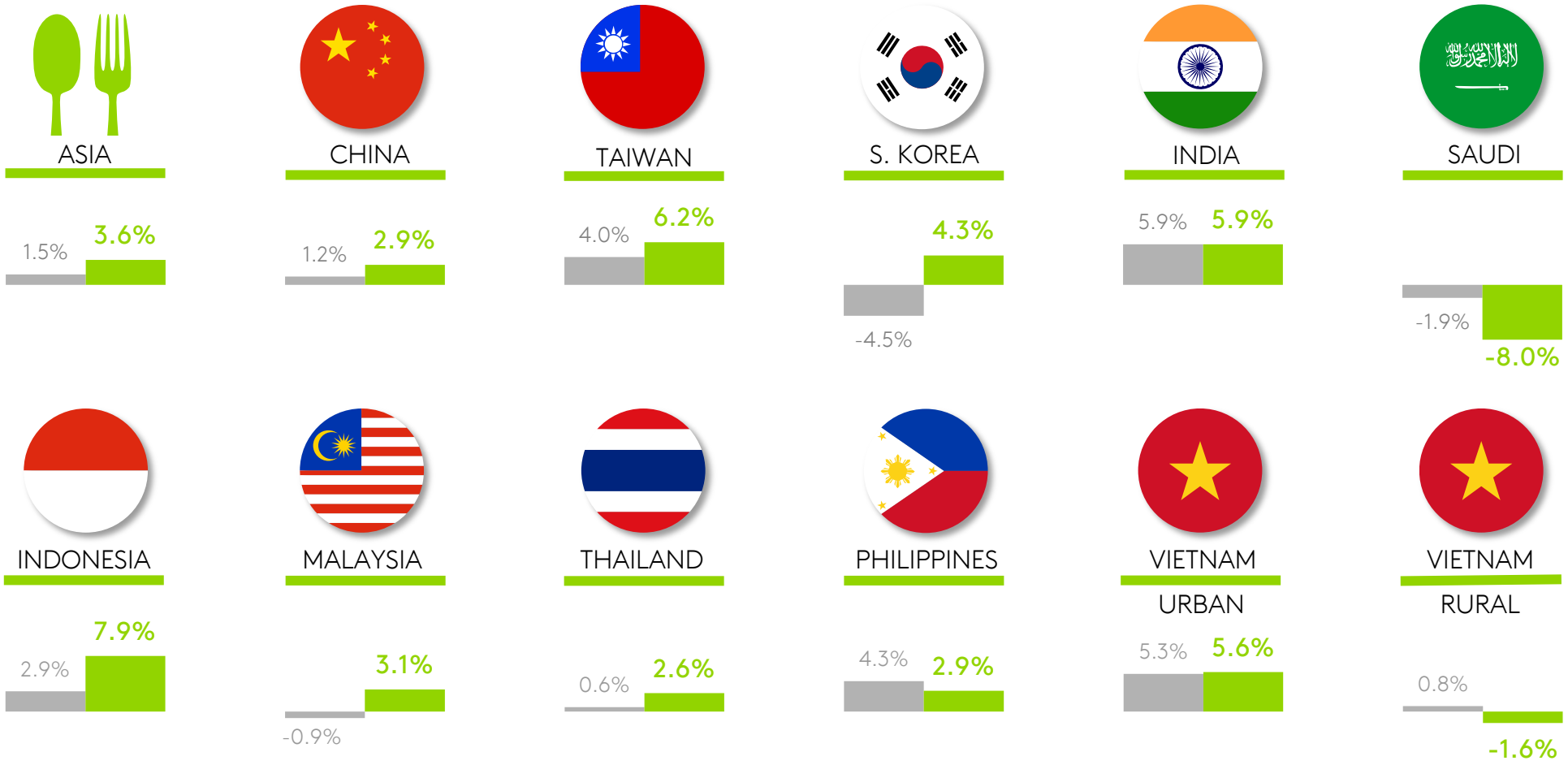
FMCG: Rising population and increased consumer spending leads to positive year-on-year growth in overall market



ASIA / MAT Q4 2017 – Value Growth FMCG

Q4'16 vs Q4'15 Q4'17 vs Q4'16

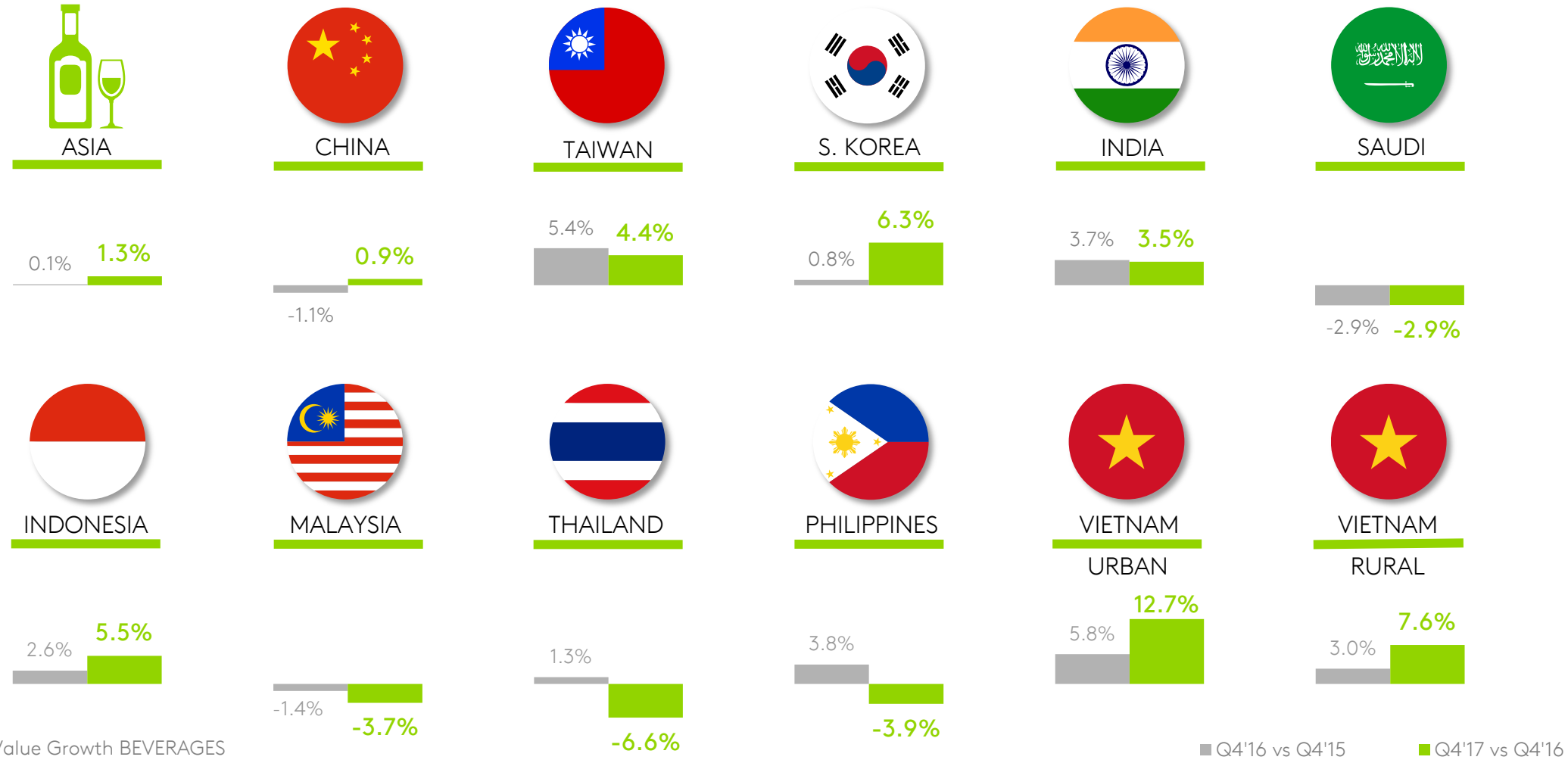
FOOD: Posted strong growth in most markets, with Indonesia the best performer, followed by Taiwan and India.



ASIA / MAT Q4 2017 – Value Growth FOOD

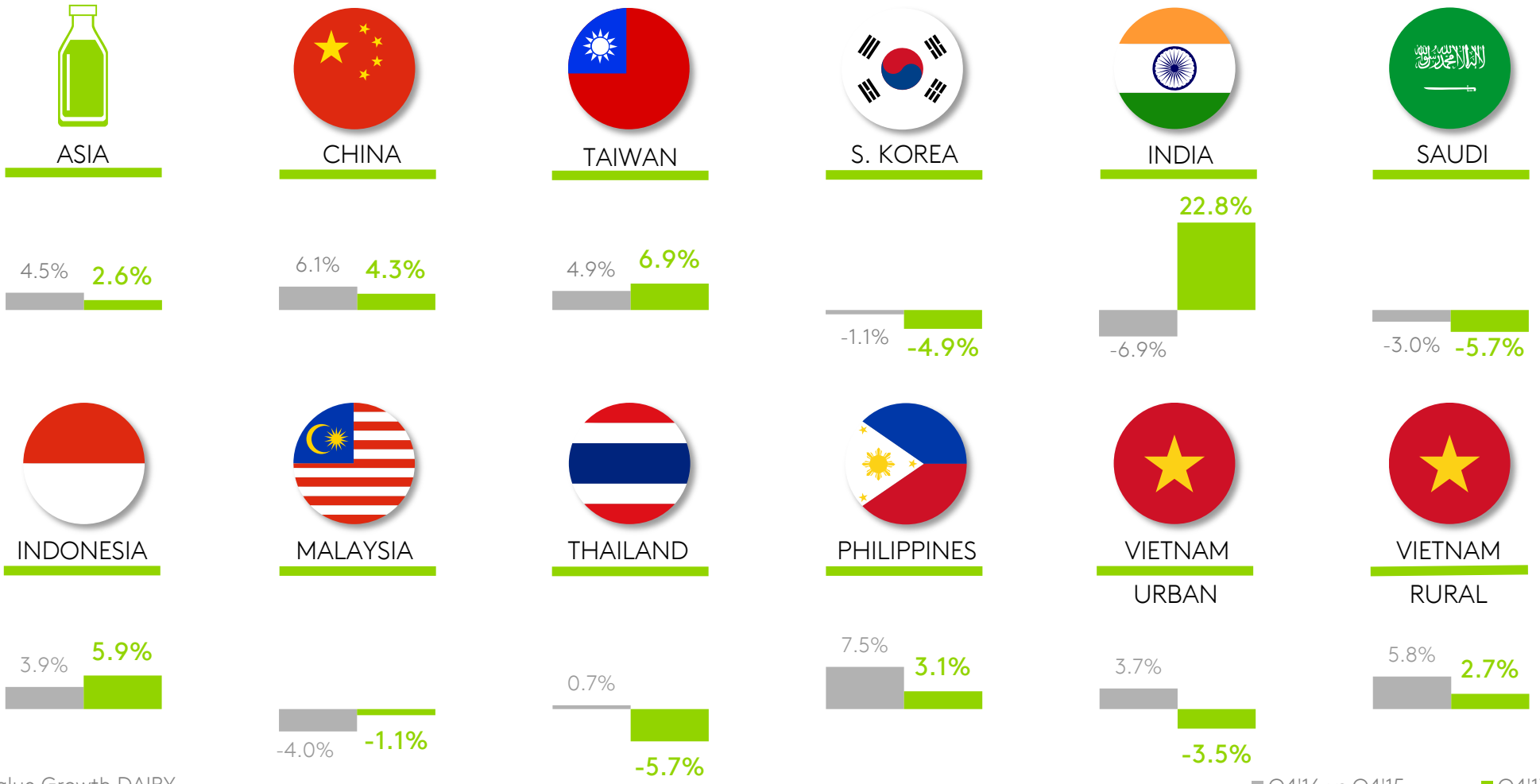
Q4'16 vs Q4'15 Q4'17 vs Q4'16

BEVERAGES: Packaged water, tea and coffee are the growing categories in beverage sector



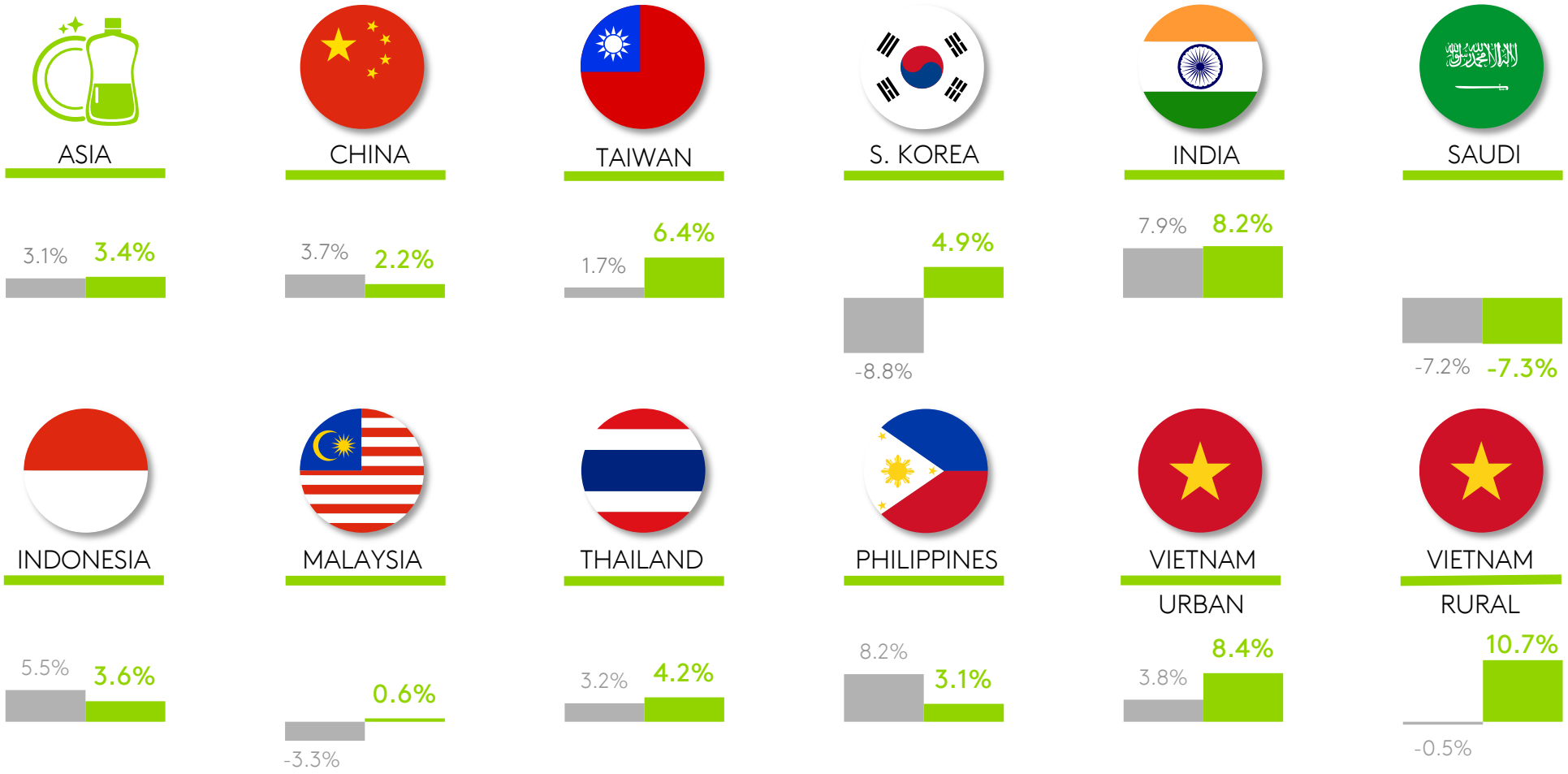
ASIA / MAT Q4 2017 – Value Growth BEVERAGES

DAIRY: Investment and marketing initiatives done by top ice-cream companies leads to an excellent growth in India



ASIA / MAT Q4 2017 – Value Growth DAIRY

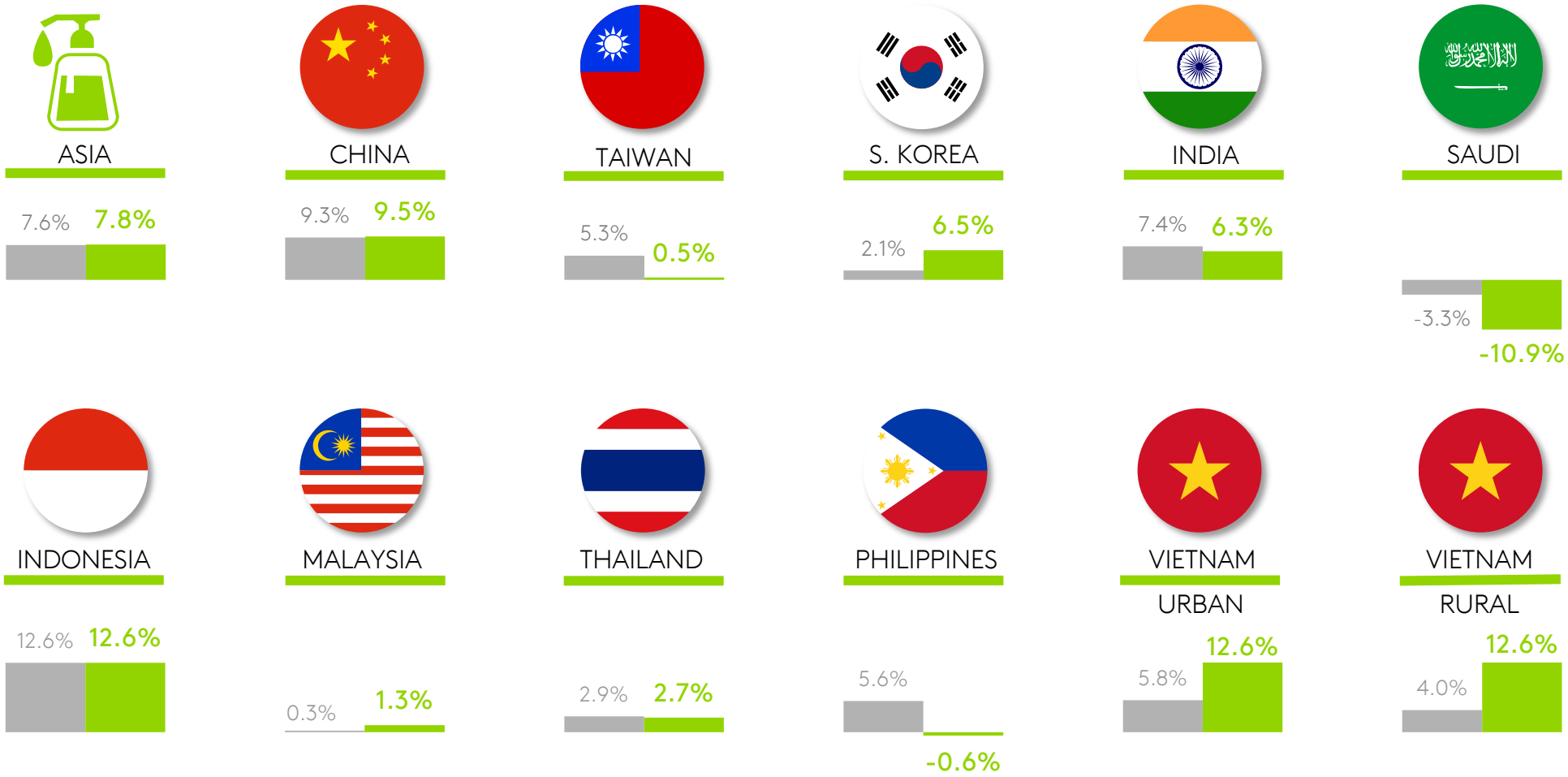
HOME CARE: Stable growth in 2017; improved living standards and rising awareness of health drives the growth in home care sector



ASIA / MAT Q4 2017 – Value Growth HOME CARE

Q4'16 vs Q4'15 Q4'17 vs Q4'16

PERSONAL CARE: The desire to look beautiful and young continues to drive consumer's demand in this sector



ASIA / MAT Q4 2017 – Value Growth PERSONAL CARE

Q4'16 vs Q4'15 Q4'17 vs Q4'16

MAT Q4 2017 | SUMMARY ASIA

CHINA

#FMCG Rebound Strongly rebound of China FMCG market in 2017 and value grew up to 4.3%, which is 0.7 point higher than 2016 and the fastest in 3 years.

#BeautyFocus Well performance development related to inner and outer beauty categories such as, soybean milk, make up etc.

#EcommerceGrowth Ecommerce market share hit 8% in 2017. Consumers tend to shop online more frequently and this contributed to the rapid growth.

TAIWAN

#PositiveEconomy Overall economy is optimistic, with good sign from GDP and stock market. However, it reflects modest to FMCG, as convenience (dining out) and fun (travelling) are still appreciated.

#QualityMatters Clear trend for quality, as suggested by growth of grounded coffee not instant, detergent of imported brands, and shampoo of premium tier.

#GrowingEC Importance of E-commerce shows no sign of stop. With increasing penetration and frequency, EC has now surpassed CVS in FMCG household consumption.

S.KOREA

#DigitalWorld Digital banking is growing fast in South Korea; it's a new emerging sector to drive domestic spending and economic growth.

#B+ Premium "Fast premium" is a trend that consumers are looking for premium and quality products even when they have a quick and simple meal.

#MiniMini Mini sized cosmetics with low price are catching consumer's attention, especially young consumers. They tend to buy a variety cosmetics without sticking to a single brand or product.

MAT Q4 2017 | SUMMARY ASIA

INDIA

#BounceBack After the initial hiccups the GST implementation is gaining momentum. It is expected to have a positive impact on FMCG purchases in 2018.

#ModernRetailing Supermarket channel has seen a speedy growth with increased no. of occasions and spends per trip. Consumers are moving towards to modern trade.

#Premiumization Overall value growth is higher than volume growth, indicating the premiumization underway in many categories.

SAUDI ARABIA

#EconomicSlowdown Due to the dependent tax levied on Expats, there is a strain on Expat's wallets, as a result, only one category has a significant growth in terms of Penetration.

#SugarTax Due to the implementation of Sugar Tax, Energy Drinks have seen a high growth in Value.

#WholesaleChannel Wholesale has bounced back to Q4 2015 levels after a drop in Q4 2016 in terms of shopping occasions.

INDONESIA

#AcceleratingGrowth Indonesia's GDP continues to accelerate at 5.07% growth, highest since 2013. Rising commodity prices are boosting Indonesia's export performance.

#SnackingBehaviour Snack categories are on the rise with the growing consumption in potato chips, candies, and ice cream.

#SelfIndulgence Cosmetic categories continues to grow, especially lipstick and eye cosmetic, revealing self image is important to consumers.

MAT Q4 2017 | SUMMARY ASIA

MALAYSIA

#StrongGrowth Economic growth recovered strongly in 2017; full year GDP grew at 5.9% compared with 4.2% expansion on 2016.

#NecessityFirst Food sector enjoyed an impressive growth at 3.1% , indicating a recovering in value spend in groceries.

#OnlineShoppingTrend Online channel is growing exponentially though market share is still small - consumers started to shop online more frequently.

THAILAND

#WeakPerformance Y2017 represents the weakest Thai FMCG performance in two decades. Consumer spending was affected by high level of household debt.

#CautiousShopper Continued consumer caution affecting grocery spend. Food and Beverage sector pulling overall FMCG into negative growth.

#ConvenienceTrend Convenience, smaller format stores, and online the best performing channels among all. Consumers tend to buy fewer items more frequently.

PHILIPPINES

#BetterThanExpected Though slower compared to previous year, Philippines' economy grew faster at 6.7% than projected in 2017.

#UniformNeeds Consumption, spending, and demand for FMCG products are similar among households.

#HealthandBeyond Households prioritizing family's health and giving value to their children's growth as seen in the rise of milk, dairy products, and baby food.

VIETNAM

#StrongerGrowth Vietnam economy grew more quickly than in 2016 and surpassed the 2017's GDP target, rising by an impressive growth rate of 6.81%.

#MiniStoresThrive Ministores continue expanding their reach in Urban areas, earning 8 incremental points in terms of buyers.

#BeautyEvolution Greater performance seen across beauty categories such as sun protection, mask, cosmetic remover. Vietnamese's skincare routine becomes more sophisticated with additional steps.

Top 5 Categories with Positive Impact – MAT Q4'17 vs Q4'16

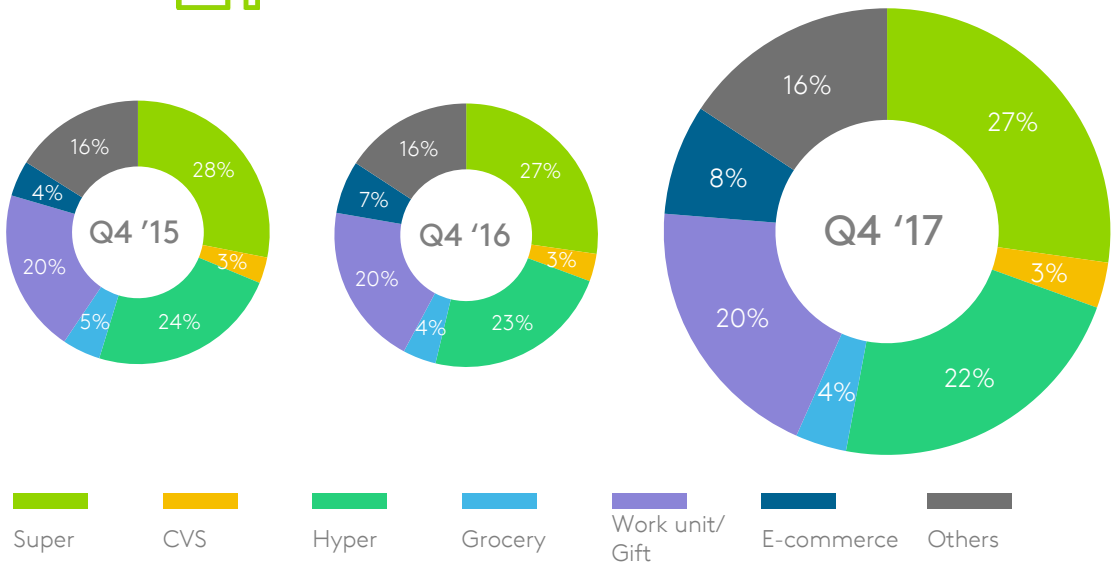
Value	Volume	Penetration
Soybean Milk	Mouthwash	Oyster Sauce
Make Up	Wet Tissues	Soybean Milk
Kitchen Rolls	Soybean Milk	Hand Wash
Nutrient Solid Drinks	Kitchen Rolls	Nutrient Solid Drinks
RTD Coffee	Mint Candy	Ice Cream

% Change FMCG Basket per Social Economic Level

MAT	Q1'17 VS Year Ago	Q2'17 VS Year Ago	Q4'17 VS Year Ago	Q4'17 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%

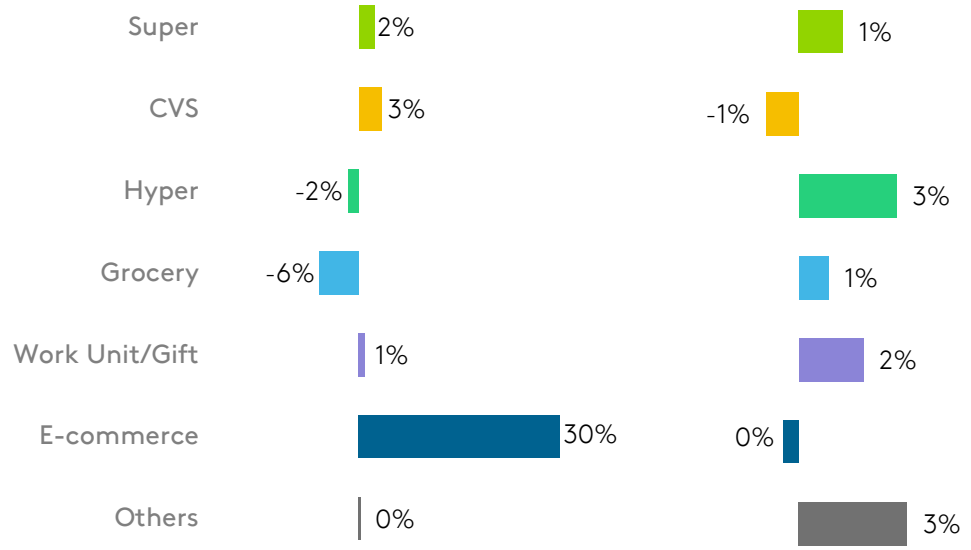
Channel Importance - %Value



MAT Q4'17 v Q4'16

Shopping Occasions

Spend/Trip



TAIWAN

Top 5 Categories with Positive Impact – MAT Q4'17 vs Q4'16

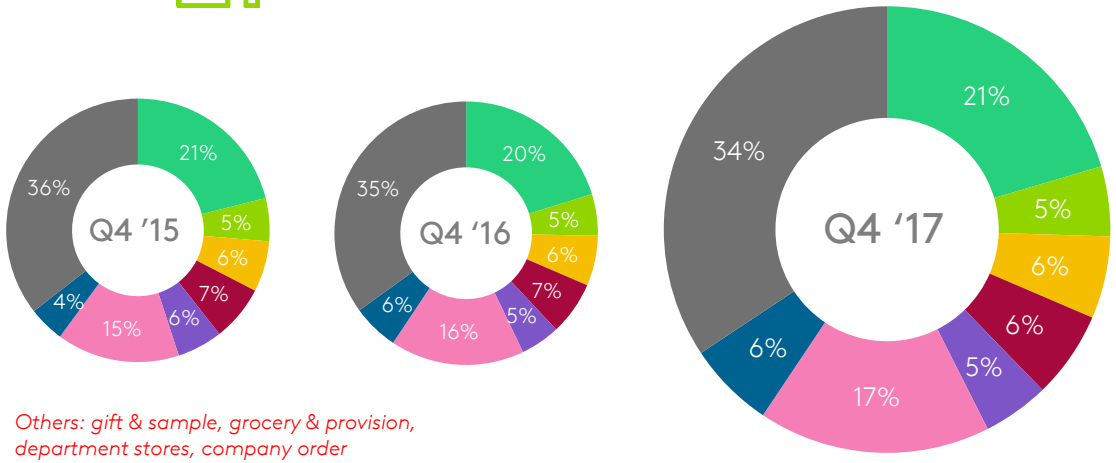
Value	Volume	Penetration
Noodles	Noodles	Body Care
Dried/Instant Noodles	Dried/Instant Noodles	Cooking Oil
Tea (hot fusion)	Packaged Groceries	Yoghurt
Cooking oil	Make Up/ Cosmetics	Beer
Frozen Food	Laundry Detergent	RTD Tea

% Change FMCG Basket per Social Economic Level

MAT	Q1'17 VS Year Ago	Q2'17 VS Year Ago	Q3'17 VS Year Ago	Q4'17 VS Year Ago
Total	Growth > 5%	Growth > 5%	Growth > 5%	-0.5% < Growth ≤ 5%
Low Income	Growth > 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	Growth ≤ -0.5%
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 > 5%	Growth > 5%

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

Channel Importance - %Value

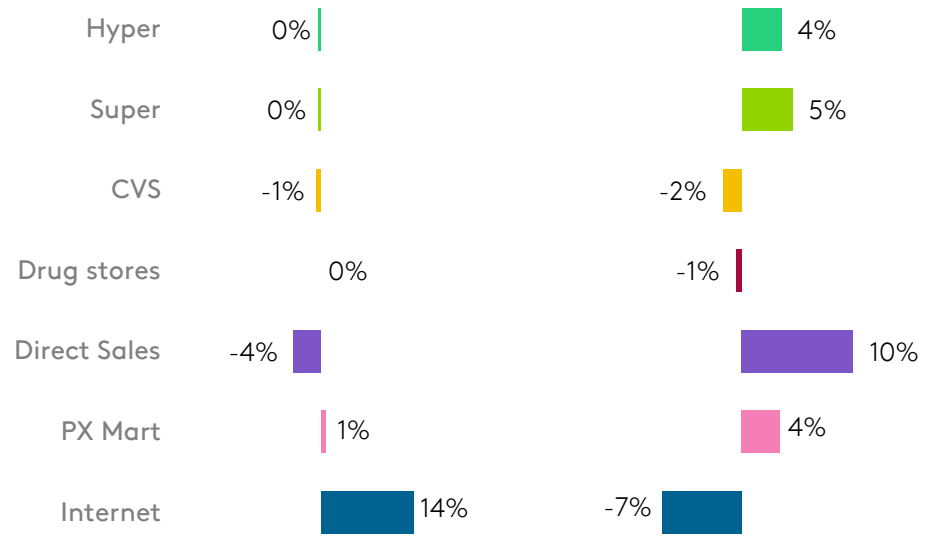


Others: gift & sample, grocery & provision, department stores, company order

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

MAT Q4'17 v Q4'16

Shopping Occasions / Spend/Trip



Top 5 Categories with Positive Impact – MAT Q4'17 vs Q4'16

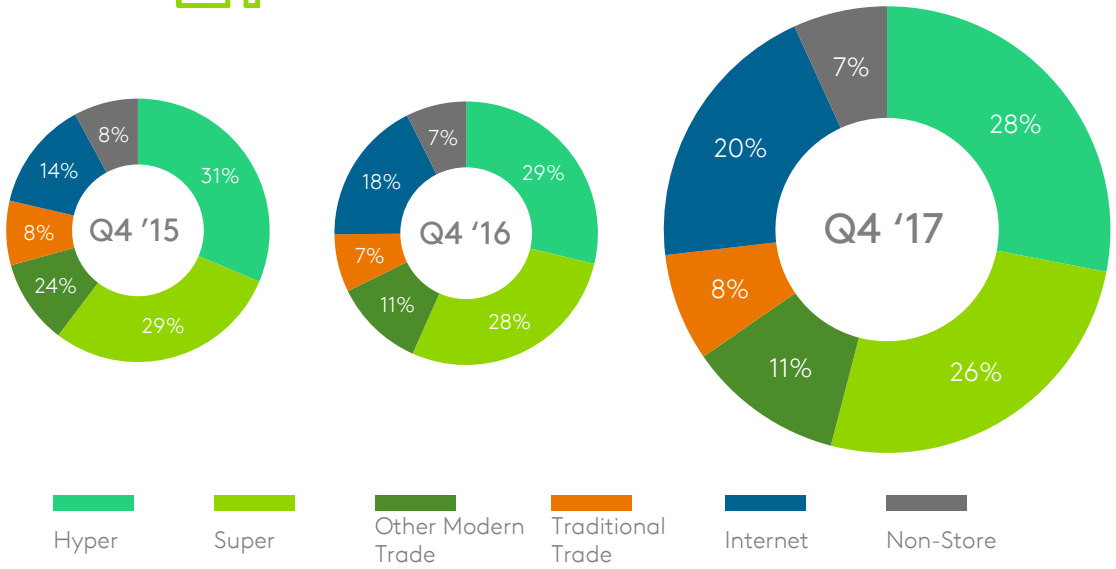
Value	Volume	Penetration
Retort	Retort	Multi Lip
Tea	Eye care	Foundation
Lip tint	Lip tint	Tea
Foundation	Foundation	Spread
Frozen prepared food	Frozen prepared food	Cockroach Bait

% Change FMCG Basket per Social Economic Level

MAT	Q1'17 VS Year Ago	Q2'17 VS Year Ago	Q3'17 VS Year Ago	Q4'17 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%	Growth > 5%	Growth > 5%	-0.5% < Growth ≤ 5%
Mid Income	-0.5% < Growth ≤ 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%	-0.5% < Growth ≤ 5%	Growth > 5%

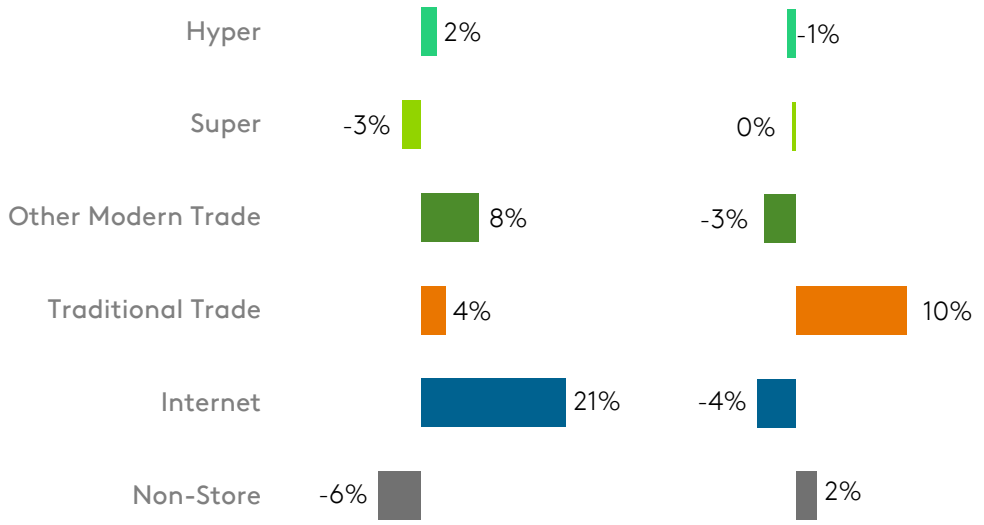
Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

Channel Importance - %Value



MAT Q4'17 v Q4'16

Shopping Occasions / Spend/Trip



Top 5 Categories with Positive Impact – MAT Q4'17 vs Q4'16

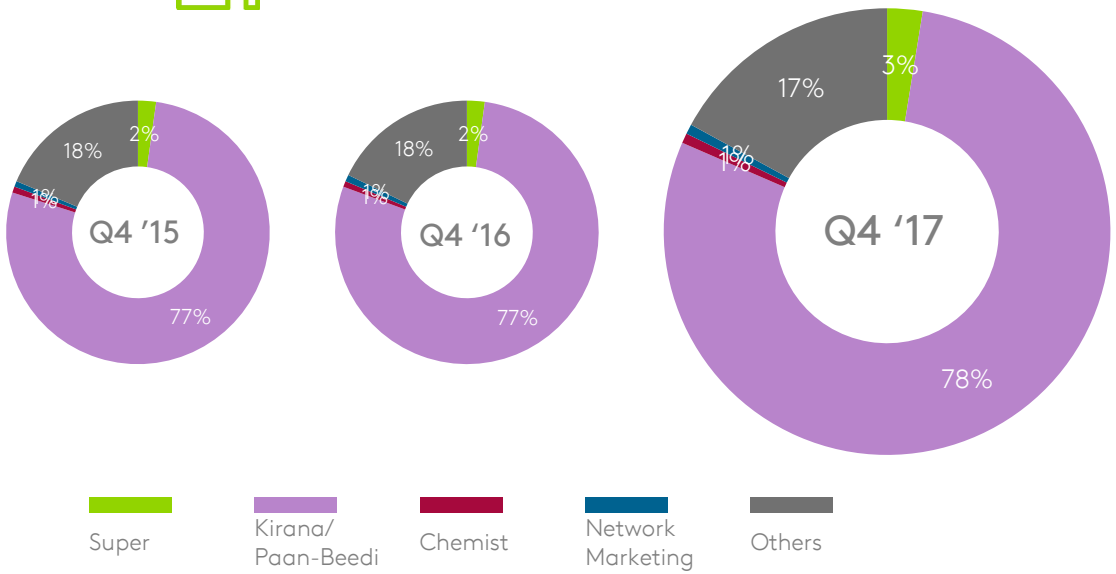
Value	Volume	Penetration
Air Freshener	Air Freshener	Toilet/Bath. Cleaner
Ice Cream/Kulfi	Ice Cream/Kulfi	Noodle/Macaroni
Noodle/Macaroni	Toilet/Bath. Cleaner	Coffee
Toilet/Bath. Cleaner	Noodle/Macaroni	Sauces
Milk Powder/Dairy Whitener	Sauces	Floor Cleaner

% Change FMCG Basket per Social Economic Level

MAT	Q1'17 VS Year Ago	Q2'17 VS Year Ago	Q3'17 VS Year Ago	Q4'17 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%

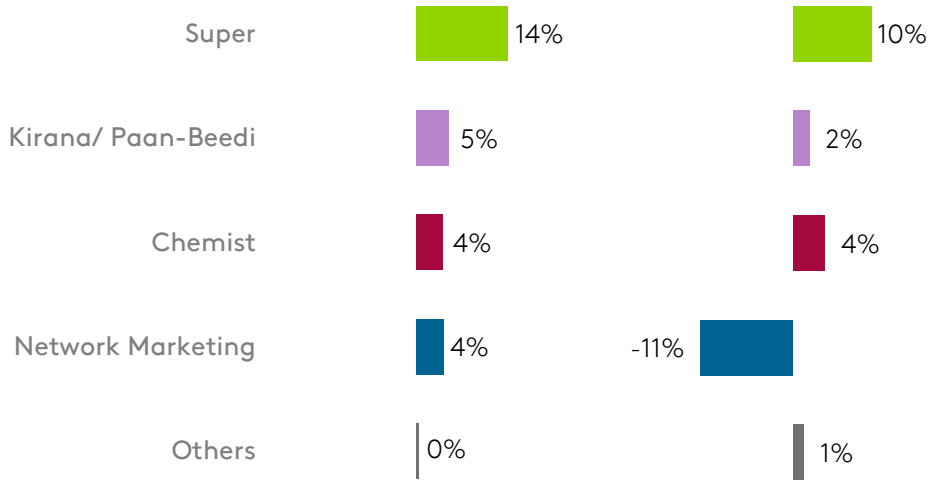
Channel Importance - %Value



MAT Q4'17 v Q4'16

Shopping Occasions

Spend/Trip



SAUDI ARABIA

Top 5 Categories with Positive Impact – MAT Q4'17 vs Q4'16

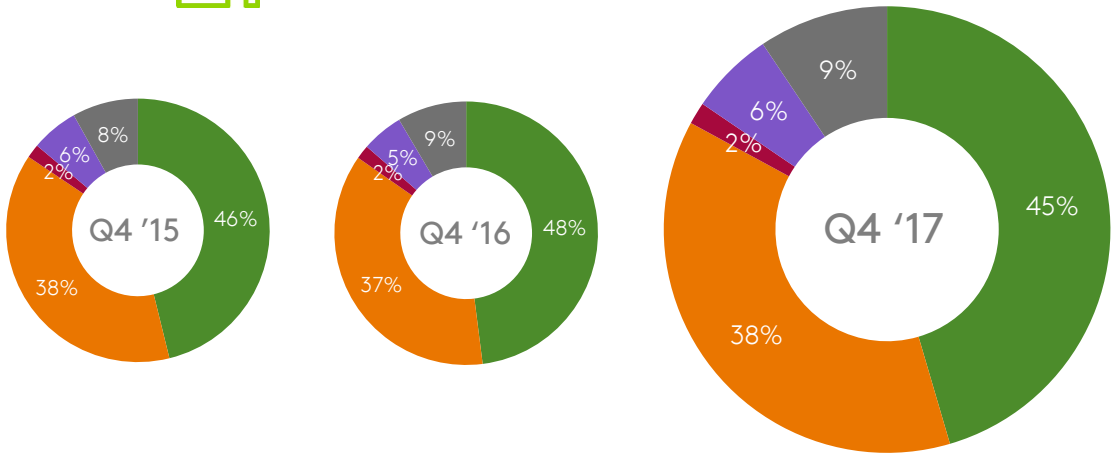
Value	Volume	Penetration
Energy Drinks	Chocolate Spreads	Chocolate Spreads
Bottled Water	Bottled Water	
Sliced Bread	Sliced Bread	
Honey		
Yoghurt (Zabadi)		

% Change FMCG Basket per Social Economic Level

MAT	Q1'17 VS Year Ago	Q2'17 VS Year Ago	Q3'17 VS Year Ago	Q4'17 VS Year Ago
Total SEC	●	●	●	●
SEC AB	●	●	●	●
SEC C	●	●	●	●
SEC D	●	●	●	●

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

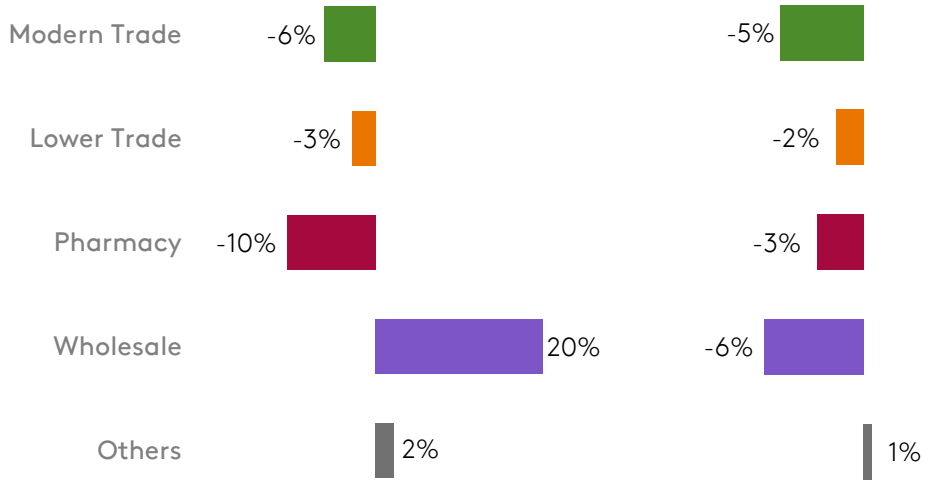
Channel Importance - %Value



Modern Trade | Lower Trade | Pharmacy | Wholesale | Others

MAT Q4'17 v Q4'16

Shopping Occasions / Spend/Trip



INDONESIA

Top 5 Categories with Positive Impact – MAT Q4'17 vs Q4'16

Value	Volume	Penetration
Lip Cosmetic	Lip Cosmetic	Cold Cereal/cereal bar
Face Mask	Face Mask	Lip cosmetic
Eye Cosmetic	Eye Cosmetic	Confectionary / Candy
RTD Coffee	RTD Coffee	Facial Moisturizer
Potato Snack	Potato Snack	RTD Coffee

% Change FMCG Basket per Social Economic Level

MAT	Q1'17 VS Year Ago	Q2'17 VS Year Ago	Q3'17 VS Year Ago	Q4'17 VS Year Ago
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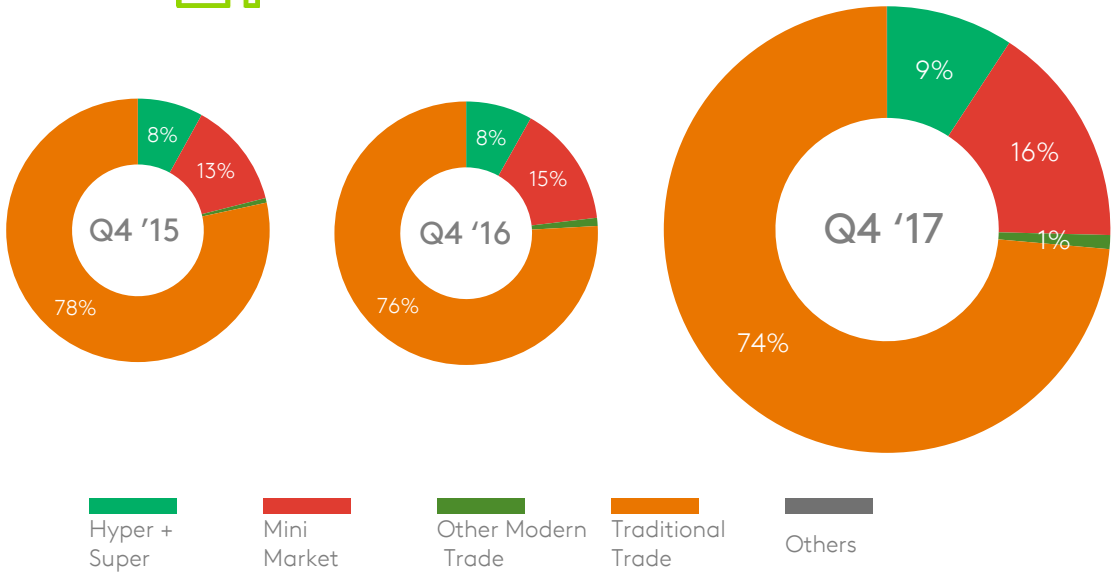
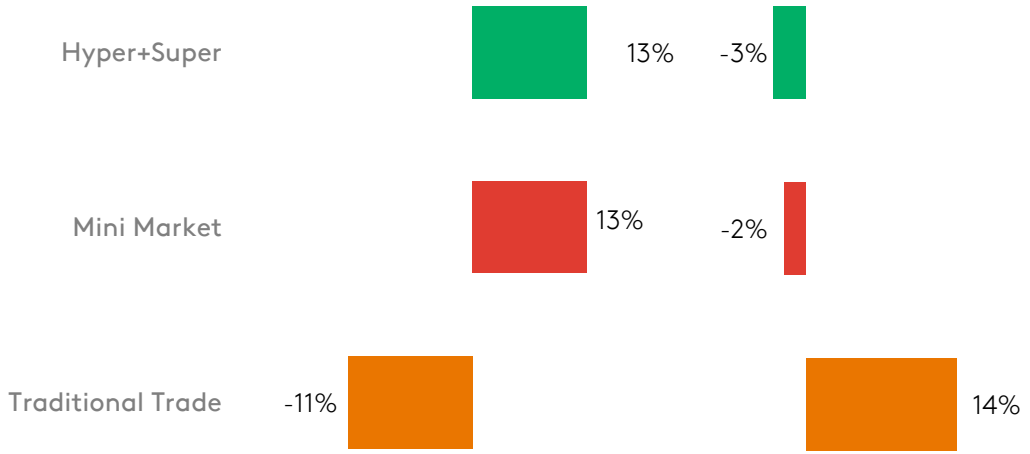


MAT Q4'17 v Q4'16

Shopping Occasions

Spend/Trip



Top 5 Categories with Positive Impact – MAT Q4'17 vs Q4'16

Value	Volume	Penetration
Lipsticks	Toilet/ Bath. Cleaner	Coconut Milk
Coconut Milk	Lipsticks	Spaghetti
RTD Coffee	Coconut Milk	Cereals
Yoghurts	RTD Coffee	One-step
MSG	Yoghurts	Liquid Milk

% Change FMCG Basket per Social Economic Level

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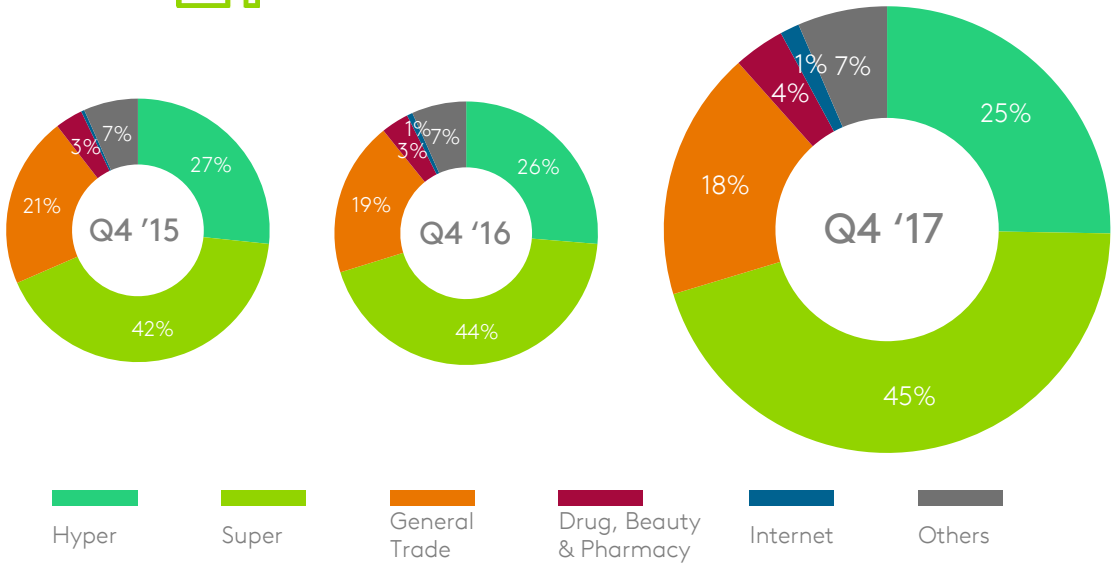
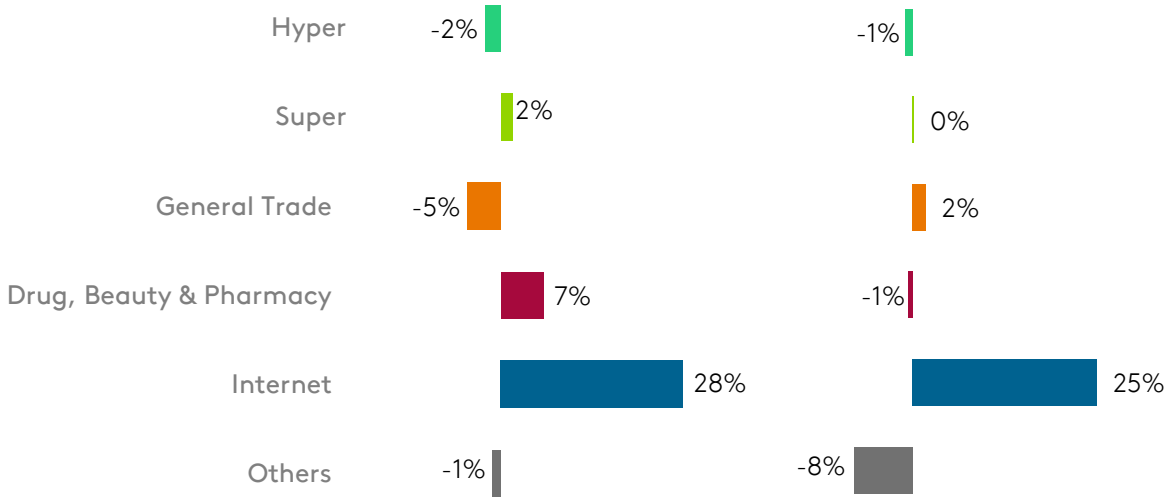


MAT Q4'17 v Q4'16

Shopping Occasions

Spend/Trip



THAILAND

Top 5 Categories with Positive Impact – MAT Q4'17 vs Q4'16

Value	Volume	Penetration
Bird's Nest	Mask	Mask
Spread	Bird's Nest	Facial Tissue
Mask	Jam	Make Up
Jam	Sun Protection	Condensed Milk
Sun Protection	Instant Tea	Sun Protection

% Change FMCG Basket per Social Economic Level

MAT	Q1'17 VS Year Ago	Q2'17 VS Year Ago	Q3'17 VS Year Ago	Q4'17 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%	Growth > 5%	Growth > 5%	Growth ≤ -0.5%
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High Income	Growth > 5%	Growth ≤ -0.5%	Growth ≤ -0.5%	-0.5% < Growth ≤ 5%

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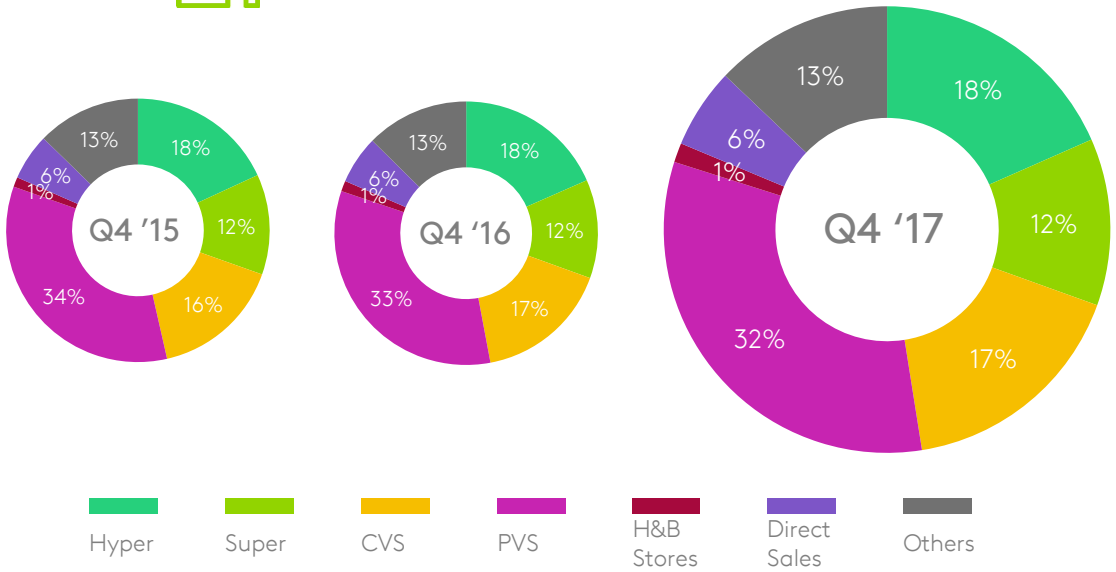
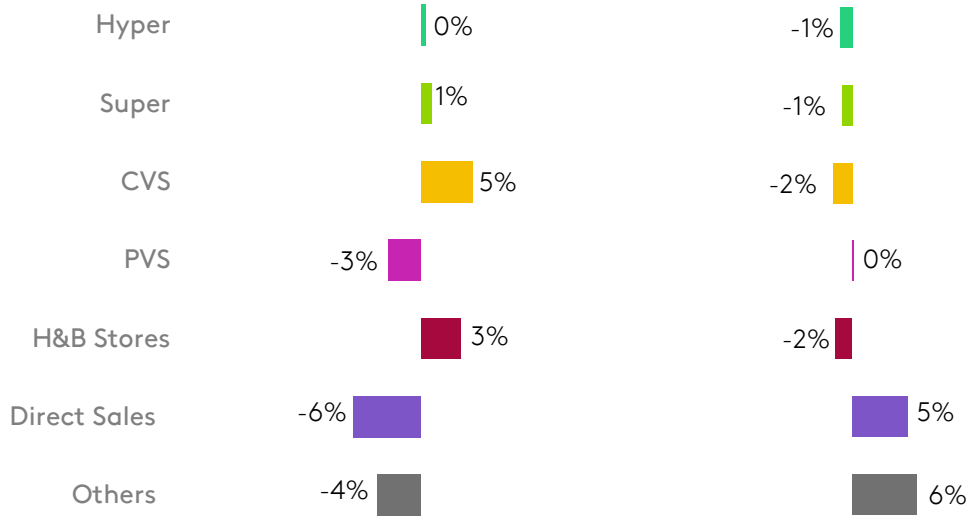
Channel Importance - %Value



MAT Q4'17 v Q4'16

Shopping Occasions

Spend/Trip



PHILIPPINES

Top 5 Categories with Positive Impact – MAT Q4'17 vs Q4'16

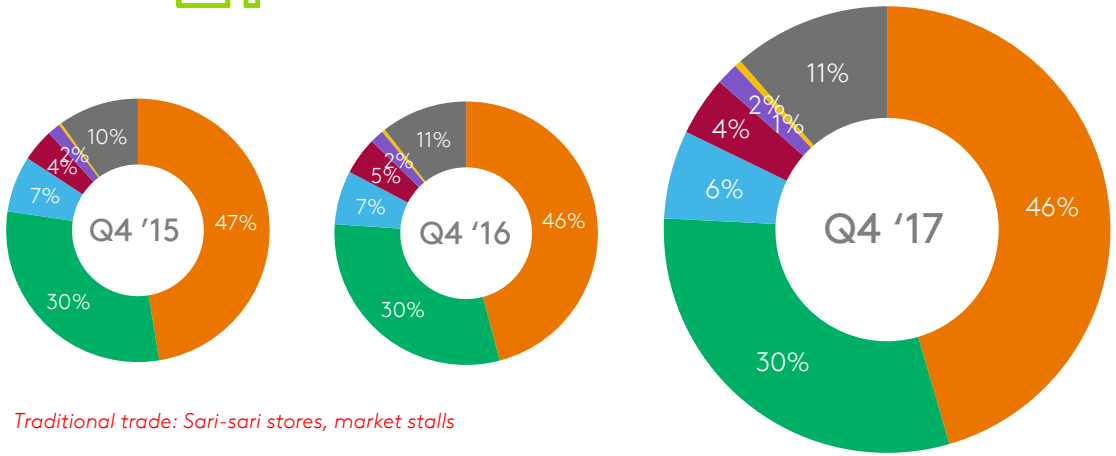
Value	Volume	Penetration
Hair Treatment	Hair Treatment	Hair Treatment
Semi-Processed Meat	Semi-Processed Meat	Semi-Processed Meat
Yoghurt Drink	Yoghurt Drink	Yoghurt Drink
Baby Food	Baby Food	Baby Food
Marshmallow	Marshmallow	Marshmallow

% Change FMCG Basket per Social Economic Level

MAT	Q1'17 VS Year Ago	Q2'17 VS Year Ago	Q3'17 VS Year Ago	Q4'17 VS Year Ago
Total	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%
SEC E	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%
SEC D	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%
SEC ABC	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	Growth ≤ -0.5%	Growth ≤ -0.5%

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

Channel Importance - %Value

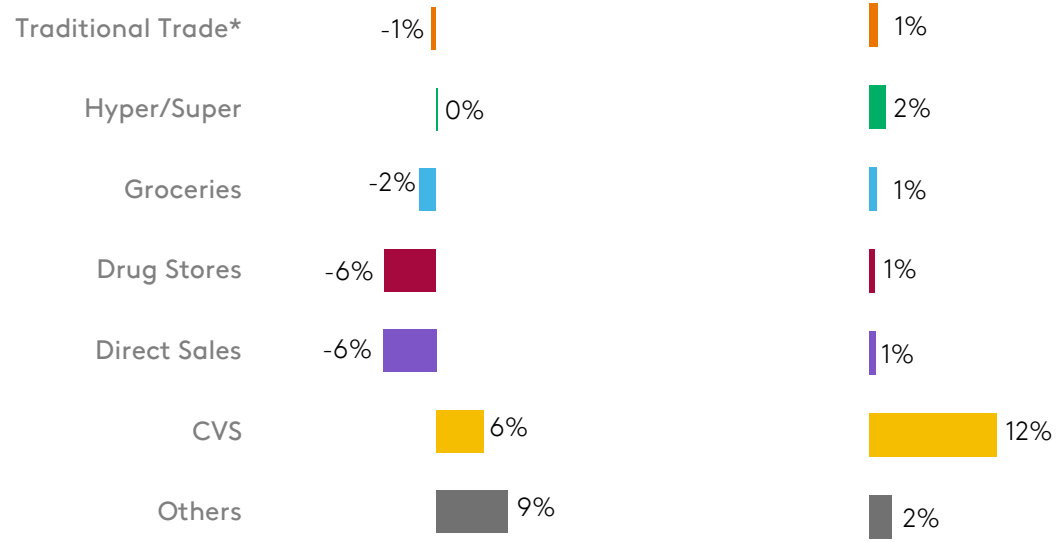


Traditional trade: Sari-sari stores, market stalls

Traditional Trade* | Hyper/ Super | Groceries | Drug Stores | Direct Sales | CVS | Others

MAT Q4'17 v Q4'16

Shopping Occasions / Spend/Trip



VIETNAM URBAN

Top 5 Categories with Positive Impact – MAT Q4'17 vs Q4'16

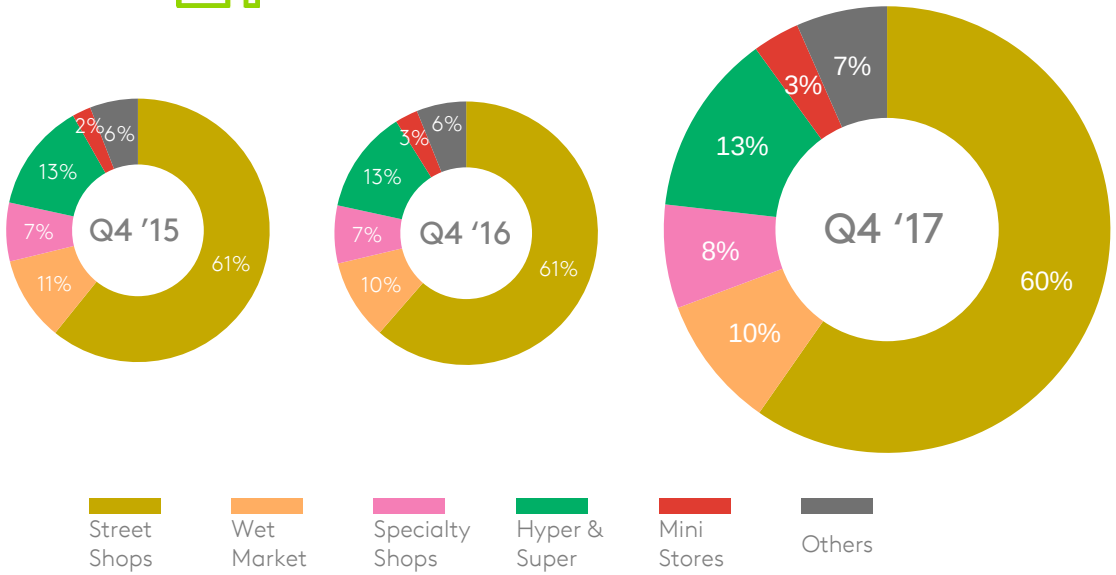
Value	Volume	Penetration
Sun Protection	Sun Protection	Soya Milk
Lipstick	Lipstick	Cakes
Mayonnaise	Mayonnaise	Mayonnaise
Liquid Detergent	Liquid Detergent	Functional Dr. Yogurt
Functional Dr. Yogurt	RTD GUM	Liquid Detergent

% Change FMCG Basket per Social Economic Level

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

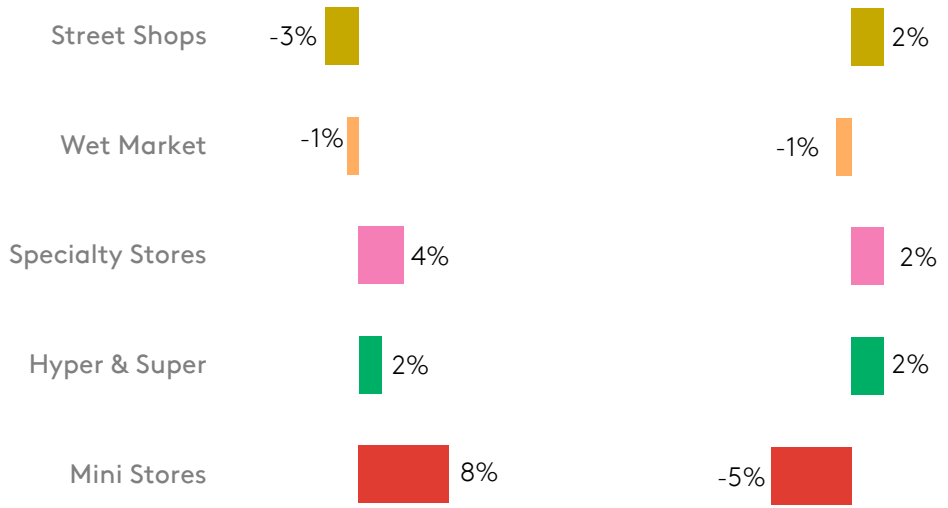
Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

Channel Importance - %Value



MAT Q4'17 v Q4'16

Shopping Occasions / Spend/Trip



VIETNAM RURAL

Top 5 Categories with Positive Impact – MAT Q4'17 vs Q4'16

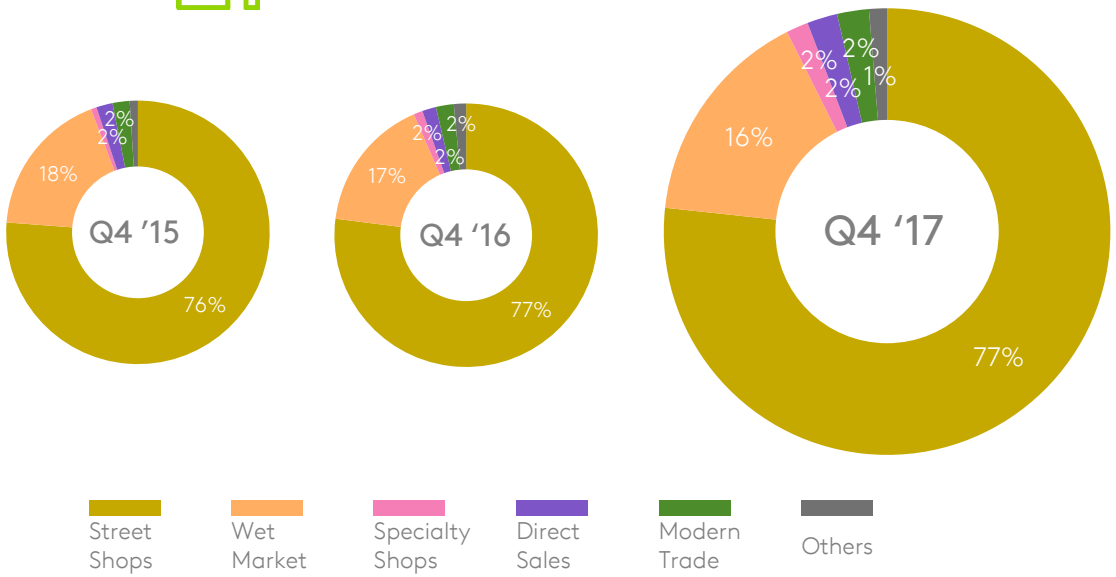
Value	Volume	Penetration
Liquid Detergent	Liquid Detergent	Carbonated Soft Drink
Adult Milk Powder	RTD GUM	Liquid Detergent
Floor Cleaner	Liquid Tonic Food Drink	Floor Cleaner
Liquid Tonic Food Drink	Chilli Sauce	Table Napkins
RTD GUM	Floor Cleaner	Soya Milk

% Change FMCG Basket per Social Economic Level

MAT	Q1'17 VS Year Ago	Q2'17 VS Year Ago	Q3'17 VS Year Ago	Q4'17 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%

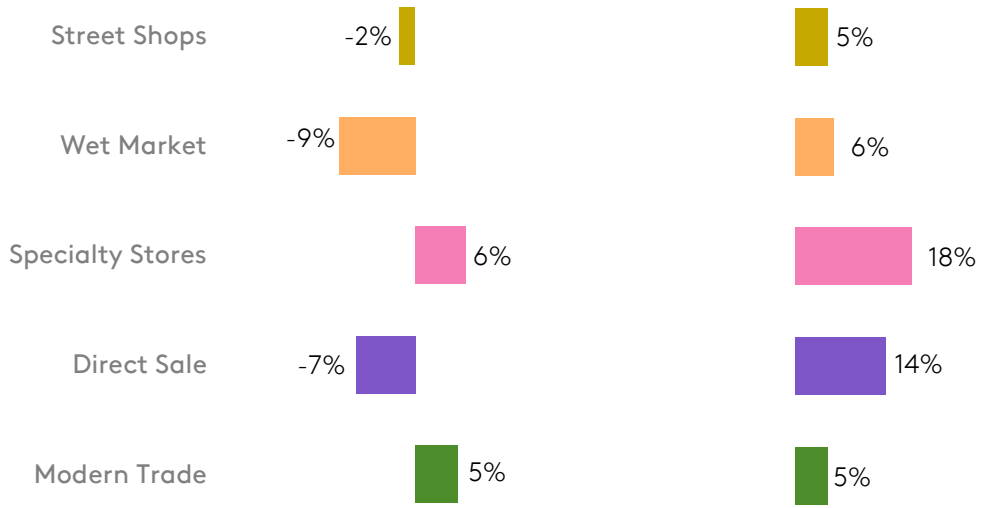
Channel Importance - %Value



MAT Q4'17 v Q4'16

Shopping Occasions

Spend/Trip



KANTAR WORLDPANEL