CONSUMER INSIGHTS

ASIA Q1 2016

KANTAR WORLDPANEL

ASIA | KEY INDICATORS Q1 2016

	CN	IN	KR	MY	PH
GDP Growth in 2015	**6.90**	**7.34**	**2.59**	**4.95**	**5.81**
2015 Inflation (CPI %)	**1.44**	**4.93**	**0.71**	**2.10**	**1.41**
Avg. Household Spend per year on FMCG*	**1,254 USD**	**197 USD***	**1,306 USD**	**682 USD**	**652.3 USD**
Annual Purchase frequency (FMCG)	**80 times**	**121 times**	**126 times**	**99 times**	**354 times**
Average Household Size	**2.8 members**	**5.3 members**	**2.9 members**	**4.3 members**	**4.8 members**

	KSA	TW	TH	VN (Urban)	VN (Rural)
GDP Growth in 2015	**3.35**	**0.75**	**2.82**	**6.68**	**6.68**
2015 Inflation (CPI %)	**2.19**	**-0.31**	**-0.90**	**0.63**	**0.63**
Avg. Household Spend per year on FMCG*	**2,144 USD**	**1,329 USD**	**624 USD**	**687 USD**	**365 USD**
Annual Purchase frequency (FMCG)	**300 times**	**95 times**	**204.8 times**	**164 times**	**142 times**
Average Household Size	**6 members**	**2.8 members**	**2.7 members**	**4.5 members**	**3.7**

GDP/CPI Source: International Monetary Fund, World Economic Outlook Database, April 2016

*Notice that each country FMCG includes all the categories tracked locally, which are not necessarily the same across Asia. In India, limited number of categories reported due to KWP not recording price)

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MAT Q1 2016 | SUMMARY ASIA

% Value Change FMCG – MAT Q1 2016 vs. Year ago

	China	India (Urban)	South Korea	Malaysia	Philippines	Saudi Arabia	Thailand	Taiwan	Vietnam (Urban)	Vietnam (Rural)
FMCG Total	Growth > 5%	Growth > 5%	Growth > 5%	Growth ≤ -0.5%	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%
Food	Growth > 5%	Growth > 5%	Growth > 5%	Growth ≤ -0.5%	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%	Growth ≤ -0.5%	Growth > 5%
Beverages	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%	Growth ≤ -0.5%	Growth > 5%	Growth > 5%
Dairy Products	Growth > 5%	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%
Home Care	Growth > 5%	Growth > 5%	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth > 5%	Growth ≤ -0.5%	Growth > 5%	Growth ≤ -0.5%	Growth > 5%	Growth > 5%
Personal Care	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%	Growth ≤ -0.5%	Growth > 5%	Growth > 5%

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

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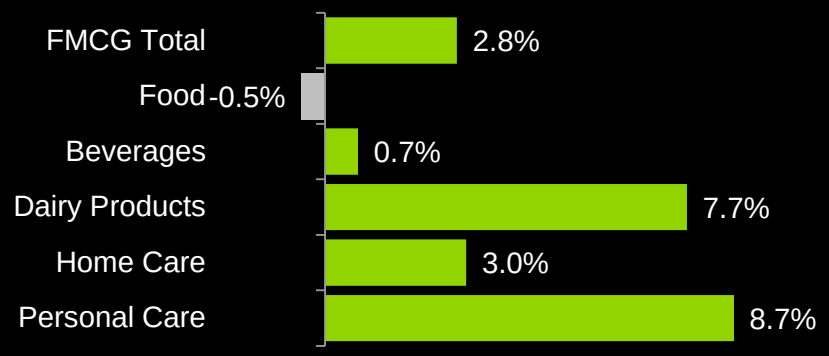
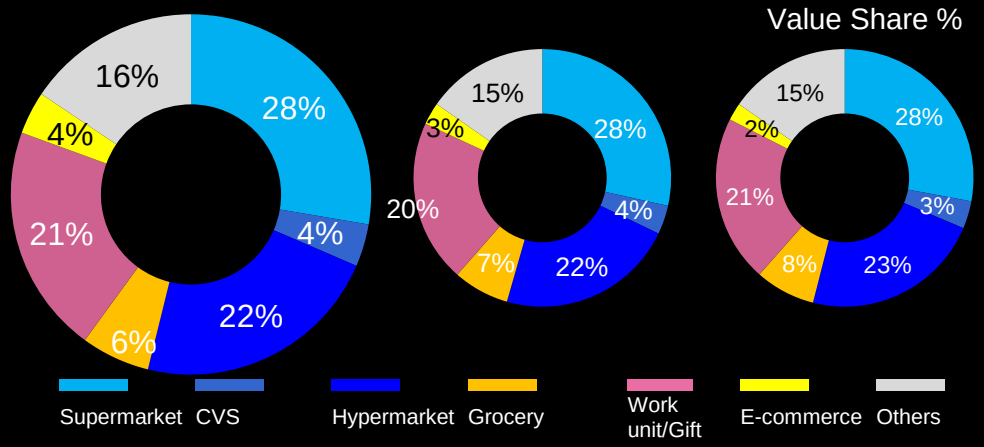
BASKET TRENDS – %Value Change MAT Q1.16 vs. YA



MAT Q1.16 / MAT Q1.15 / MAT Q1.14

Value Share %



%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q2'15 VS year ago	MAT Q3'15 VS year ago	MAT Q4'15 VS year ago	MAT Q1'16 VS year ago
Total	Growth > 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%
Low Income	Growth ≤ -0.5%	-0.5% < Growth ≤ 5%	Growth > 5%	Growth > 5%
Mid Income	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	Growth ≤ -0.5%
High Income	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%

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

TOP 10 RECRUITERS IN CHINA (by penetration points growth)

Rank	Categories	Additional Penetration points
1	OYSTER SAUCE	3.3
2	FOREIGN SPIRIT	2.8
3	CHEESE	0.8
4	CURRY	0.8
5	FROZEN FOOD	0.6
6	FACIAL TISSUES	0.6
7	LIQUID	0.5
8	PACKAGE WATER	0.4
9	TOMATO KETCHUP	0.3
10	KITCHEN ROLLS	0.3

Source: MAT Q1'16 vs YA Category Penetration%

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Source: Urban India

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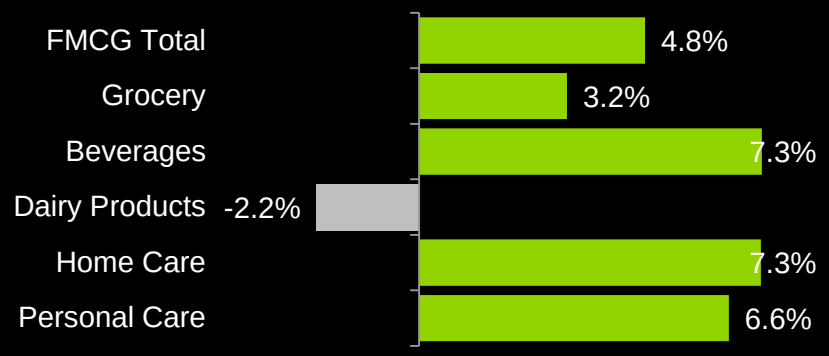
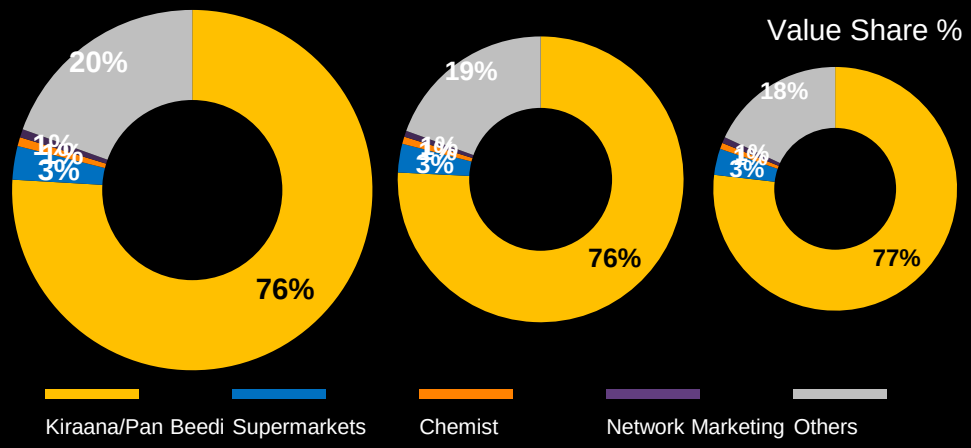
BASKET TRENDS – %Value Change MAT Q1.16 vs. YA



MAT Q1.16 / MAT Q1.15 / MAT Q1.14

Value Share %



%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q2'15 VS year ago	MAT Q3'15 VS year ago	MAT Q4'15 VS year ago	MAT Q1'16 VS year ago
Total	Yellow	Yellow	Yellow	Yellow
SEC A/B	Yellow	Yellow	Yellow	Yellow
SEC C	Green	Green	Yellow	Yellow
SEC D/E	Yellow	Yellow	Yellow	Yellow

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

TOP 10 RECRUITERS IN INDIA (by penetration points growth)

Rank	Categories	Additional Penetration points
1	FLOOR CLEANER	2.9
2	TOILET/BATHROOM CLEANERS	2.7
3	SAUCE/KETCHUP	1.5
4	DEPLATORIES/HAIR SHAVERS	0.7
5	SANITARY PRODUCT	0.6
6	METAL SCOURERS	0.4
7	JAMS	0.2
8	BOTTLED SOFT DRINKS	0.2
9	SALTY SNACKS	0.2
10	HAIR OIL AND DRESSINGS	0.1

Source: MAT Q1'16 vs YA Category Penetration%

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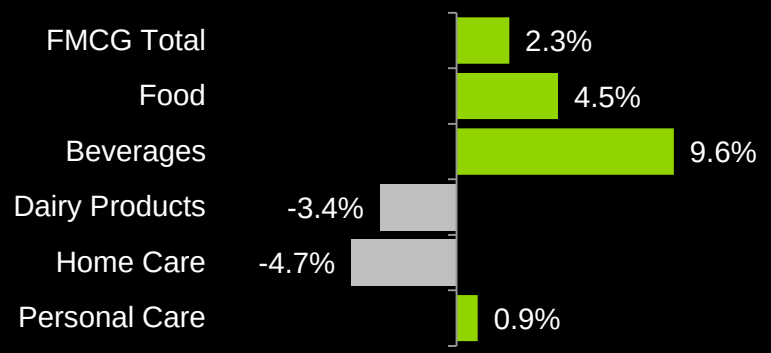
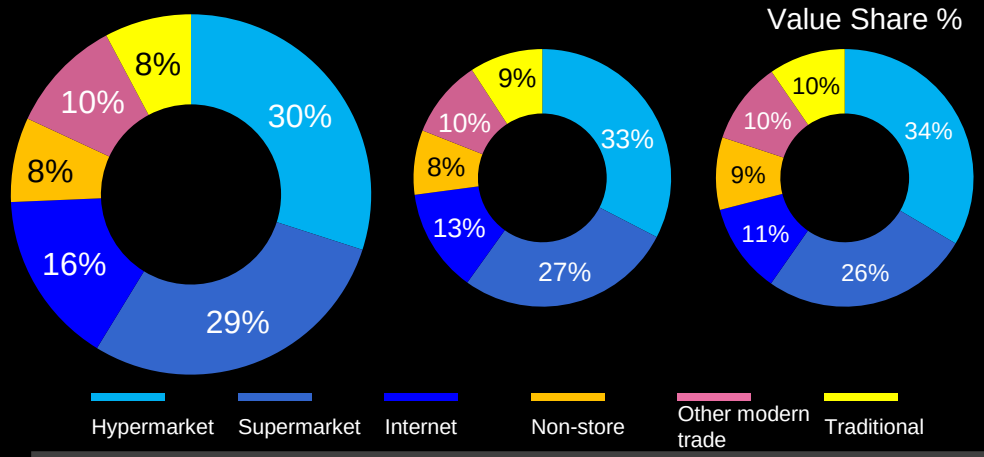
BASKET TRENDS – %Value Change MAT Q1.16 vs. YA



MAT Q1.16 / MAT Q1.15 / MAT Q1.14

Value Share %



%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q2'15 VS year ago	MAT Q3'15 VS year ago	MAT Q4'15 VS year ago	MAT Q1'16 VS year ago
Total	Yellow	Yellow	Yellow	Yellow
Low Income	Grey	Yellow	Green	Green
Mid Income	Green	Green	Green	Yellow
Mid-High Income	Grey	Yellow	Green	Green
High Income	Grey	Grey	Grey	Grey

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

TOP 10 RECRUITERS IN KOREA (by penetration points growth)

Rank	Categories	Additional Penetration points
1	WATER	16.2
2	FLAVORED MILK	13.8
3	CSD	13.5
4	FROZEN READY MEAL	12.6
5	SAUCE	12.6
6	JUICE	12.5
7	RETORT	12.4
8	COFFEE DRINK	11.5
9	IMITATED CRAB MEAT	10.7
10	SAND BISCUIT/WAFER	10.0

Source: MAT Q1'16 vs YA Category Penetration%

Note: KR methodology change, sample expansion and sample redesign effective in 2015

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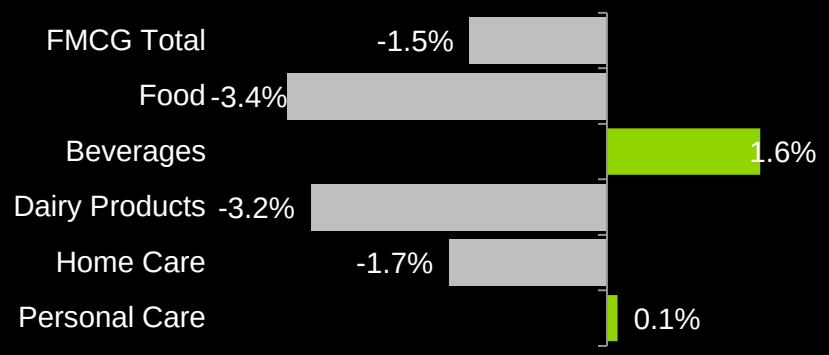
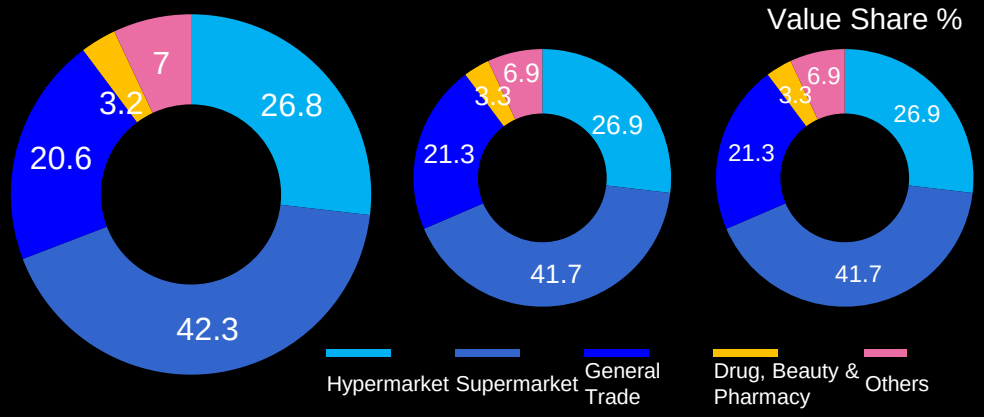
BASKET TRENDS – %Value Change MAT Q1.16 vs. YA



MAT Q1.16 / MAT Q1.15 / MAT Q1.14

Value Share %



%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q2'15 VS year ago	MAT Q3'15 VS year ago	MAT Q4'15 VS year ago	MAT Q1'16 VS year ago
Total	🟡	⚪	⚪	⚪
Low Income	🟡	🟡	🟡	🟡
Mid Income	⚪	⚪	⚪	⚪
High Income	⚪	⚪	⚪	⚪

⚪ Growth ≤ -0.5% 🟡 -0.5% < Growth ≤ 5% 🟢 Growth > 5%

TOP 10 RECRUITERS IN MALAYSIA (by penetration points growth)

Rank	Categories	Additional Penetration points
1	CHOC/NUT SPREAD	2.7
2	LIQUID SOAP	1.6
3	BUTTER	1.4
4	RTD TEA	1.4
5	DEODORANT	1.3
6	EGGS	1.3
7	TOILET TISSUE	1.3
8	YOGHURT DRINK	1.1
9	COCONUT MILK	1.0
10	GHEE	1.0

Source: MAT Q1'16 vs YA Category Penetration%

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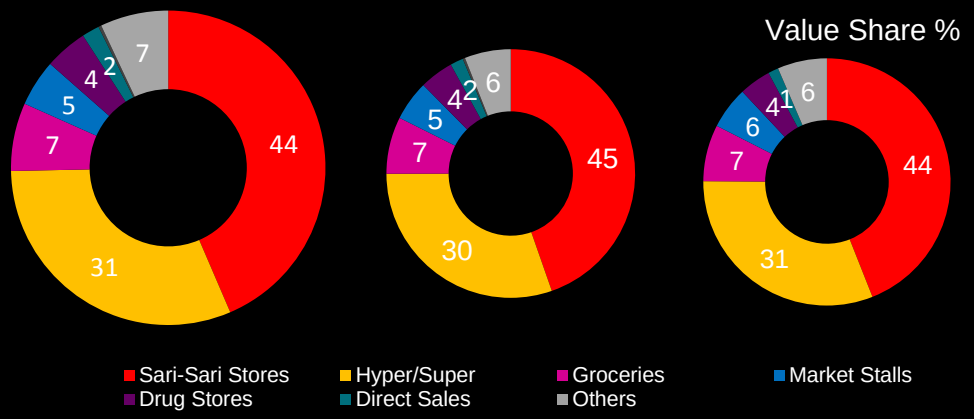
BASKET TRENDS – %Value Change MAT Q1.16 vs. YA

MAT Q1.16 / MAT Q1.15 / MAT Q1.14

Value Share %



%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q2'15 VS year ago	MAT Q3'15 VS year ago	MAT Q4'15 VS year ago	MAT Q1'16 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%	Growth > 5%	Growth > 5%	Growth > 5%

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

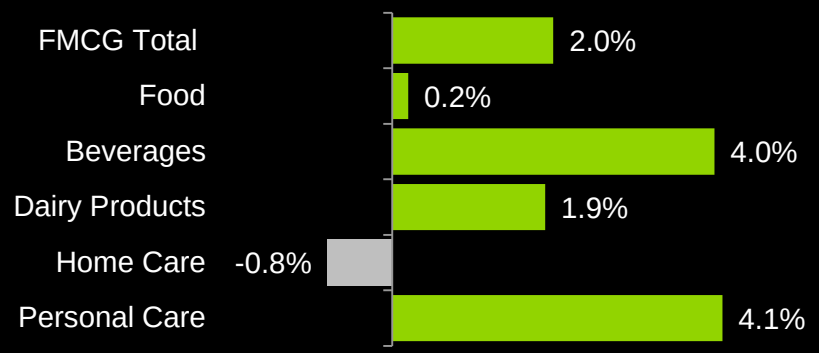
TOP 10 RECRUITERS IN THE PHILIPPINES (by penetration points growth)

Rank	Categories	Additional Penetration points
1	INSTANT CEREAL BEVERAGE	9.1
2	OYSTER SAUCE	7.1
3	RTE BREAKFAST CEREAL	6.8
4	TOOTHBRUSH	6.7
5	LIQUID DETERGENT	6.6
6	SCOURING PADS	5.8
7	MAYO/SALAD DRESSING	5.8
8	DISHWASH	4.9
9	POWDERED TEA	4.8
10	CORNED BEEF	4.7

Source: MAT Q1'16 vs YA Category Penetration%

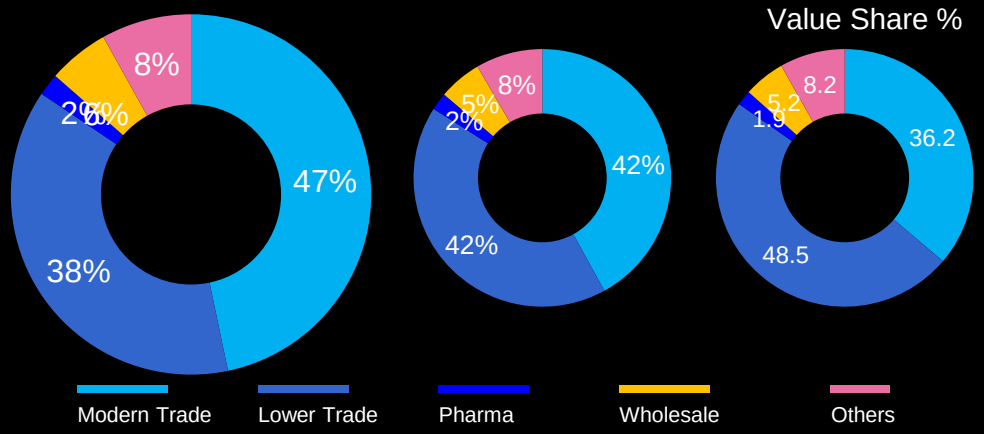
© Kantar Worldpanel

BASKET TRENDS – %Value Change MAT Q1.16 vs. YA



MAT Q1.16 / MAT Q1.15 / MAT Q1.14

Value Share %



%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q2'15 vs year ago	MAT Q3'15 vs year ago	MAT Q4'15 vs year ago	MAT Q1'16 vs year ago
Total SECs	Growth > 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%
AB	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	Growth ≤ -0.5%	Growth ≤ -0.5%
C	Growth > 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%	-0.5% < Growth ≤ 5%
D	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%

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

TOP 10 RECRUITERS IN KSA (by penetration points growth)

Rank	Categories	Additional Penetration points
1	SOUPS	4.8
2	EVAPORATED MILK	4.3
3	FRESH MILK	3.7
4	BODY DEODORANT	2.9
5	CHEESE	2.8
6	CONDENSED MILK	2.7
7	LABNEH	1.9
8	SANITARY NAPKINS	1.5
9	BREAKFAST CEREALS	1.4
10	COFFEE CREAMER	1.1

Source: MAT Q1'16 vs YA Category Penetration%

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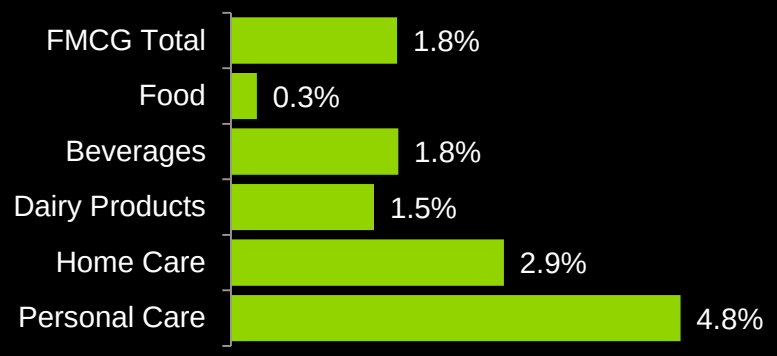
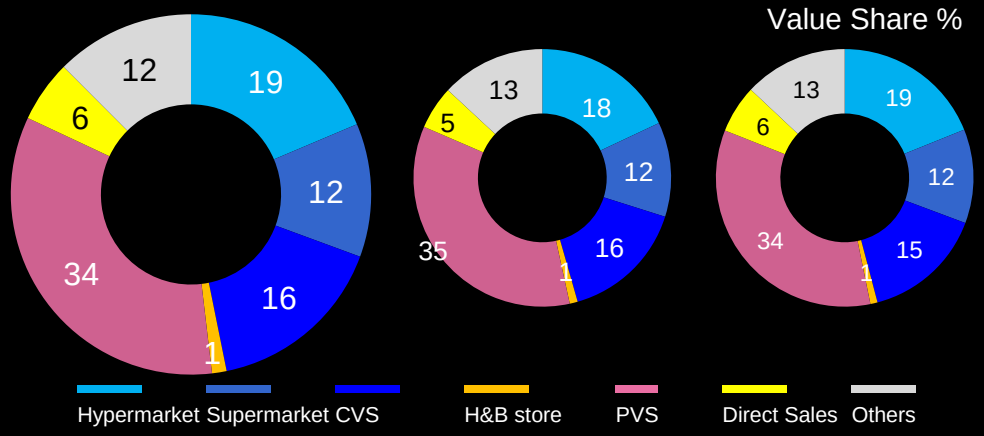
BASKET TRENDS – %Value Change MAT Q1.16 vs. YA



MAT Q1.16 / MAT Q1.15 / MAT Q1.14

Value Share %



%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q2'15 VS year ago	MAT Q3'15 VS year ago	MAT Q4'15 VS year ago	MAT Q1'16 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	Growth > 5%	Growth > 5%	Growth ≤ -0.5%	Growth > 5%

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

TOP 10 RECRUITERS IN THAILAND (by penetration points growth)

Rank	Categories	Additional Penetration points
1	FACIAL TISSUE	11.5
2	SUN PROTECTION	9.4
3	BEER	8.3
4	DRESSINGS	8.2
5	BOTTLE WATER	6.5
6	RICE	4.0
7	MASK	3.1
8	RTD COFFEE	2.6
9	HAIR COLORANT	1.2
10	BABY DIAPER	1.2

Source: MAT Q1'16 vs YA Category Penetration%

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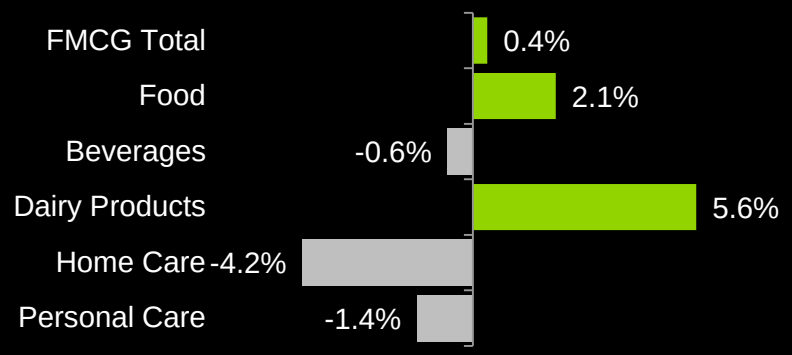
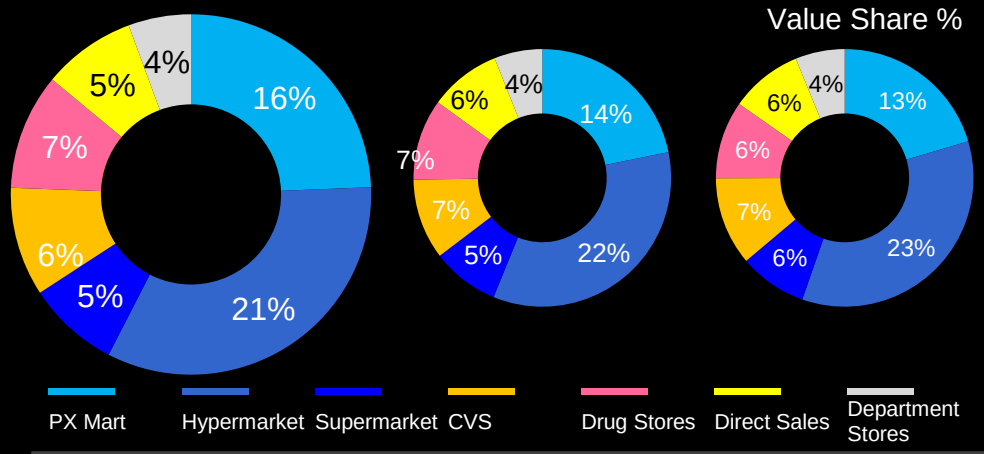
BASKET TRENDS – %Value Change MAT Q1.16 vs. YA



MAT Q1.16 / MAT Q1.15 / MAT Q1.14

Value Share %



%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q2'15 VS year ago	MAT Q3'15 VS year ago	MAT Q4'15 VS year ago	MAT Q1'16 VS year ago
Total	Yellow	Yellow	Yellow	Yellow
Low Income	Grey	Grey	Yellow	Yellow
Mid Income	Grey	Yellow	Yellow	Grey
High Income	Yellow	Yellow	Yellow	Yellow

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

TOP 10 RECRUITERS IN TAIWAN (by penetration points growth)

Rank	Categories	Additional Penetration points
1	SEASAME OIL	3.9
2	PACKAGED WATER	3.5
3	FLOUR	3.3
4	CORN	3.1
5	WET TISSUE	2.4
6	YOGHURT	2.3
7	COFFEE	2.3
8	BOULLION	2.2
9	KITCHEN ROLL	2.0
10	MOUTHRINSE	1.6

Source: MAT Q1'16 vs YA Category Penetration%

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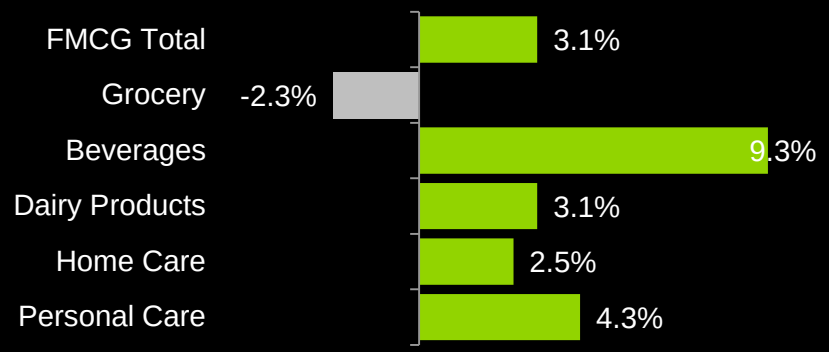
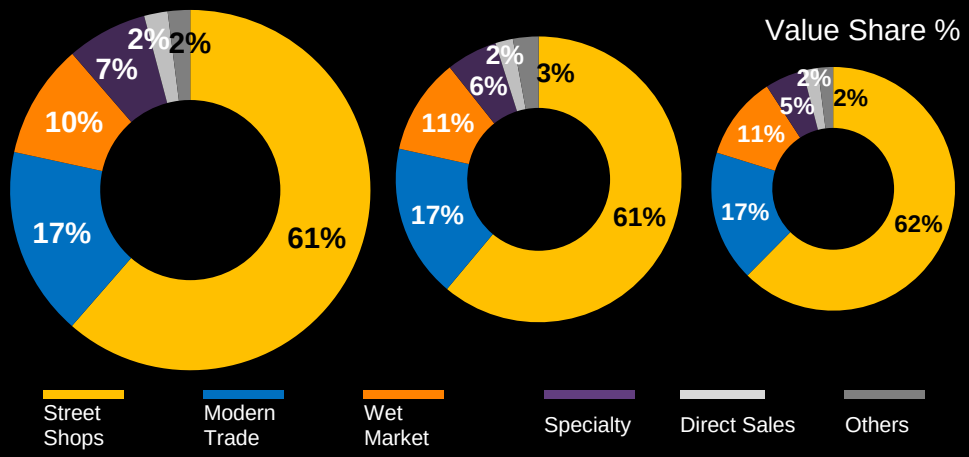
BASKET TRENDS – %Value Change MAT Q1.16 vs. YA



MAT Q1.16 / MAT Q1.15 / MAT Q1.14

Value Share %



Note: Data Urban 4 cities

%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q2'15 VS year ago	MAT Q3'15 VS year ago	MAT Q4'15 VS year ago	MAT Q1'16 VS year ago
Total	Yellow	Yellow	Yellow	Yellow
Low Income	Grey	Grey	Grey	Grey
Mid-Low Income	Yellow	Grey	Grey	Grey
Mid-High Income	Grey	Green	Green	Green
High Income	Green	Green	Green	Green

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

TOP 10 RECRUITERS IN VIETNAM (by penetration points growth)

Rank	Categories	Additional Penetration points
1	LIQUID TFD	4.6
2	LIQUID DETERGENT	4.5
3	HYBRID DRINK	3.8
4	RTD IFT	3.8
5	BOTTLED WATER	3.5
6	TABLE NAPKINS	3.3
7	INSTANT TEA	3.1
8	FUNCTIONAL DKY	2.9
9	KETCHUP/TOMATO SAUCE	2.7
10	CANNED FISH	2.1

Source: MAT Q1'16 vs YA Category Penetration%

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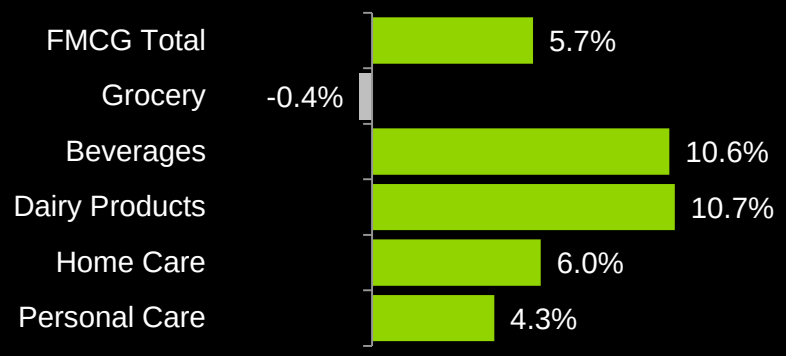
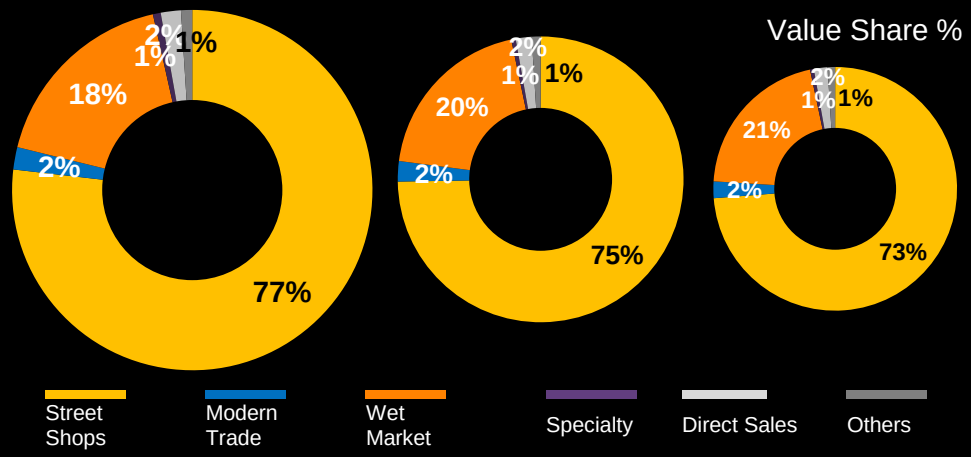
BASKET TRENDS – %Value Change MAT Q1.16 vs. YA



MAT Q1.16 / MAT Q1.15 / MAT Q1.14

Value Share %



Note: Data Rural Vietnam

%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT	MAT Q2'15 VS year ago	MAT Q3'15 VS year ago	MAT Q4'15 VS year ago	MAT Q1'16 VS year ago
Total	Growth > 5%	Growth > 5%	Growth > 5%	Growth > 5%
Low Income	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth ≤ -0.5%	Growth ≤ -0.5%
Mid-Low Income	Growth > 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%

TOP 10 RECRUITERS IN VIETNAM (by penetration points growth)

Rank	Categories	Additional Penetration points
1	SOYA MILK	8.0
2	DRINKING YOGURT	5.4
3	CHILLI SAUCE	5.3
4	RTD IFT	4.8
5	LIQUID TFD	4.3
6	SWEETENED CONDENSED	4.1
7	SOYA SAUCE	2.3
8	GRANULES	1.7
9	VINEGAR	1.5
10	LIQUID MILK	1.4

Source: MAT Q1'16 vs YA Category Penetration%

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