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# Taiwan

# Exporter Guide

# Annual

# 2002

Approved by:
**Stan Cohen, Director, ATO**
**American Institute in Taiwan**
Prepared by:
Based on a report by FBR Asia, Ltd.

**Report Highlights:**
**Taiwan is the sixth largest export market for U.S. food and agricultural products in the world. In 2001, the United States exported $2.1 billion of agricultural products to Taiwan, capturing 35 percent of total imports. In terms of per capita food imports from the United States, Taiwan ranks number two in the world after Canada. With Taiwan's accession to the World Trade Organization in January 2002, U.S. exporters now enjoy increased access to this dynamic market.**

Includes PSD changes: No
Includes Trade Matrix: No
Annual Report
Taipei ATO [TW2], TW

## Executive Summary

Taiwan is the United States' sixth largest export market in the world for food and agricultural products. In terms of per capita imports from the United States, it ranks number two in the world. Since Taiwan entered the World Trade Organization (WTO) in January 2002, various trade barriers have been liberalized. Average agricultural tariffs have dropped from the previous 20 percent to the current 14 percent and they will gradually be reduced to around 12 percent by the end of 2005. This will provide new opportunities for a wide range of U.S. agricultural products, including fresh produce, dairy products, meat, seafood, and processed food products. In addition, because of Taiwan's relatively small agricultural sector, Taiwan's dependance on imports will continue to grow. Taiwan's continued modernization, and increased adoption of American and western food tastes make the country an extremely attractive market for U.S. exporters.

Taiwan's retail, food service, and food processing are consolidating and modernizing in response to fierce competition. Retail and food processing in particular are seeking to increase efficiency in sourcing and distribution of products. All three sectors are looking for new products--either to import or develop--in order to get a leg up on their competitors. Major export opportunities include: fresh fruit and vegetables, poultry, beef, wine, dairy products, snacks, fruit juices, food ingredients, seafood, frozen products, and a wide variety of specialty food products.

Over the last decade, Taiwan has been one of Asia's most dynamic economies. However, in 2001 the economy contracted by 2.2 percent, the first time since World War II, largely in response to the downturn in the world economy and weak demand for the country's exports. However, the most recent official forecast for 2002 annual GDP growth was estimated at 3.2%. The Directorate General of Budget, Accounting, and Statistics (DGBAS) predicted that the per capita GDP will reach US$12,982 in 2002.

The total production value of the domestic food and beverage industry in 2001 amounted to NT$ 431 billion (US$ 12.8 billion), ranking it the fourth largest among manufacturing industries island-wide, behind electronic/electrical machinery, chemicals, and metal industries. Projected annual growth for 2002 is -1.5 percent. Oriented primarily towards domestic sales, the food industry consists of more than 8,700 manufacturing enterprises employing more than 100,000 persons.

**Table: Output of Taiwan's Food & Agriculture Industry (NT$Billion)**

| Sector | 2000 | 2001 | Growth Rate 2000/2001 | Forecast Growth Rate 2001/2002 |
|---|---|---|---|---|
| Slaughtering | 47.92 | 45.43 | -5.2% | NA |
| Dairy Products | 21.57 | 23.72 | 9.97% | NA |
| Canned Food | 7.70 | 7.64 | -0.78% | NA |
| Frozen Foods | 34.50 | 29.52 | -14.43 | NA |

| | | | | |
|---|---|---|---|---|
| **Dehydrated Foods** | **3.49** | **4.15** | **18.91%** | **NA** |
| **Preserved Foods** | **3.48** | **4.31** | **23.85%** | **NA** |
| **Sugar Confectionery** | **6.48** | **5.62** | **-13.27%** | **NA** |
| **Bakery Products** | **18.75** | **17.48** | **-6.77%** | **NA** |
| **Edible Oils & Fats** | **14.54** | **14.27** | **-1.86%** | **NA** |
| **Grain Milling** | **25.07** | **24.06** | **-4.03%** | **NA** |
| **Rice Milling** | **36.98** | **43.80** | **18.44%** | **NA** |
| **Sugar Production** | **5.62** | **4.96** | **-11.74%** | **NA** |
| **MSG Production** | **4.71** | **4.71** | **0%** | **NA** |
| **Edible Salt** | **1.73** | **1.71** | **-1.16%** | **NA** |
| **Soy Sauce** | **3.82** | **4.06** | **6.28%** | **NA** |
| **Other Seasonings** | **3.68** | **3.70** | **0.54%** | **NA** |
| **Wine & Liquor** | **23.96** | **21.04** | **-12.19%** | **NA** |
| **Malt Liquor and Malt** | **22.18** | **21.51** | **-3.02%** | **NA** |
| **Soft Drinks & Carbonated Waters** | **45.16** | **44.67** | **-1.09%** | **NA** |
| **Noodle Production** | **14.79** | **11.28** | **-23.73%** | **NA** |
| **Animal Feed** | **43.88** | **45.23** | **3.08%** | **NA** |
| **Tea Production** | **2.51** | **2.49** | **-0.80%** | **NA** |
| **Miscellaneous Food** | **47.31** | **45.24** | **-4.38%** | **NA** |
| **TOTAL** | **439.81** | **430.59** | **-2.10%** | **-1.5%** |
| **Source: Department of Statistics, Ministry of Economic Affairs/Food Industry Research and Development Institute (FIRDI) Forecast US$1=NT$33.75** | | | | |

Taiwan’s consumers are becoming more sophisticated. Two income families as well as single unit households are replacing the traditional extended family. For the food industry this is creating a demand for more "western" style food items, as well as an emphasis on pre-cooked and convenience foods and snacks. With a greater awareness of the value of health and nutrition, there is a growing demand for low salt and low sugar products as well as pre-packaged convenience foods to suit the demands of more westernized lifestyles of the younger generation.

Taiwan’s standard of living has increased over the past few years. Consequently people are more affluent and more demanding in terms of seeking convenience. Home appliances are commonplace and with the growing number of women pursuing careers in the workforce, demand for frozen and microwaveable foods has risen. Local consumers are traveling overseas with greater frequency and, among the younger generation especially, are adopting lifestyles that are more western oriented. This includes demanding higher quality and more nutritious food items and a diet that increasingly mixes western food with more traditional Chinese meals.

Taiwanese eat outside the home with much greater frequency than most westerners. It has been estimated that up to 23 percent of all meals are taken outside of the home. In 2001, total sales turnover of the food service industry amounted to NT$ 223 billion (US$ 6.6 billion), a 12 percent decrease from the 2000 level. Annual growth rates over the past few years have surpassed 10 percent until 2000. Only 2001 showed a reduction (12%), but this was attributable to the overall economic slowdown in Taiwan. Total sales turnover is expected to maintain flat growth over the next few years.

Taiwan's population is aging. Taiwan has a population growth rate of less than 1 percent annually and life expectancies are now 72 years for males and 78 years for females. At the same time, the extended family is becoming less common and there is a growing demand for prepared foods suitable for the elderly.

The western corridor of the island is the most heavily populated with the three major population centers being: Taipei (north), Taichung (center), and Kaohsiung (south). People living within the western island corridor of Taiwan spend more on food than people living on the east coast. Taipei and Kaohsiung are the two cities showing the highest expenditure on food.

Generally fashion trends and new products are launched in Taipei (Northern Taiwan), are then picked up in Kaohsiung (Southern Taiwan), and then move to Taichung (Central Taiwan). The distribution of food outlets nationwide is presented in the table below:

| Outlets | North | Central | South | East | Total |
|---|---|---|---|---|---|
| Department Stores | 26 | 15 | 18 | 5 | 64 |
| Supermarkets | 485 | 292 | 222 | 72 | 1,071 |
| Convenience Stores | 3,155 | 1,721 | 1,805 | 53 | 6,734 |
| Hypermarkets | 42 | 27 | 34 | 7 | 110 |

Source: 2002 Supermarket/Hypermarket Yearbook, Retailing Mart

## Advantages and Challenges Faced by US Exporters

| Advantages | Challenges |
|---|---|
| Taiwan officially entered the WTO in January 2002, providing new opportunities for a wide range of U.S. agricultural products. | Competition from Australia, New Zealand, Japan, China, Korea, and the European Union |
| U.S. food products enjoy a good reputation. | |

| | |
|---|---|
| Taiwanese consumers are increasingly affluent and open to Western food products. | |
| Taiwanese frequently travel to the United States and are influenced by American tastes. | |
| Proliferation of U.S. restaurant chains in Taiwan encourages U.S. imports. | |

## Section II. Exporter Business Tips

### Local Business Customs

Distribution and retailing costs in Taiwan are relatively high. Often, more than 40 percent of a product's retail price goes towards a "shelf fee" imposed by the supermarket or hypermarket. In the case of convenience stores, the shelf fee can be as high as NT$ 30,000 (US$ 890) per product. There are also additional charges associated with in-store promotional activities as well as new store openings, anniversaries, etc.

For this reason, many local food-processing companies have set up their own retail chains and distribution systems. They not only import food ingredients for local processing, but also import finished products to sell in their retail chains.

Payment to the wholesaler is often by 120 day post-dated check. Selling on consignment is another means by which importers and their distributors can expand the number of retail outlets featuring their product, particularly for new or less well-known products.

### Marketing Techniques

For food items the most common form of marketing is through in-store promotion with samples for tasting being provided at the point of sale. Associated packaging is also common in Taiwan whereby a product is sold in association with a second product as a variation of the "two for the price of one" strategy. Fresh meat is often sold with an accompanying sauce (usually a pepper sauce) and sometimes with a recipe card attached.

In Taiwan as in any foreign market, certain ground rules apply of which the most basic is the need to do the necessary "homework" before entering the market.

### Some Basic Rules for Selling to Taiwan:

1. Research the market; know the potential of the market for your product.
2. Understand how current market needs are being met. Is the item in question produced locally? If so, what are the local "preferences" with regard to taste, packaging and presentation?

3. To what extent is the market reliant on imported product. What advantages can your product claim?
4. Who is the ultimate purchaser of the product? What are the factors influencing purchasing decisions? To what extent is price and seasonality determining factors for your product?
5. Are you selling direct to distributors or through an exclusive local agent? If the end-user is not an established importer then most probably you will need to appoint an importer to handle customs clearance and other formalities.
6. Obtain informed views of your own product. Be ready to "sell" its advantages with specification sheets and other relevant data presented in Chinese.
7. Use existing networks to build your contacts. There is a U.S. Agricultural Trade Office in Taipei that assists U.S. companies to identify suitable companies in Taiwan who can assist your market entry. Foreign banks as well as chambers of commerce are another valuable source of local knowledge.
8. Do not expect one visit to change established buying patterns. Most probably it will take several visits and time to establish personal relationships of trust worthy of substantial and repeat orders.
9. Above all else, give the market the attention it deserves and ensure that your own management is working at optimum efficiency. Commit the necessary resources (time, people, money) to ensure success.
10. Understand Taiwan's food and agricultural import regulations and standards. Imported processed food products which contain artificial food additives are subject to strict tolerance levels and acceptable use requirements for food additives as prescribed by Taiwan's Department of Health (DOH). Confirm these regulations/standards with your prospective importer and/or ATO Taipei in advance.

Whether buying or selling, keep a flexible attitude towards achieving your objective but always be ready to walk away from a bad deal. The Taiwanese are not as impatient as many foreign business people to close a deal and will take the time to probe the other's position. Do not fall into the trap of being pressured by time.

**General Import and Inspection Procedures**

Once the cargo has been released from the ship, the customs broker submits the proper documents and duties due for clearance to the Customs office. It takes less than 24 hours for Customs inspector(s) to review the documentation and at random to inspect the shipment.

Imported items listed on the "Commodities Subject to Legal Animal and Plant Quarantine," such as fresh produce and meat, should obtain an approval from the Bureau of Animal & Plant Health Inspection & Quarantine (BAPHIQ) in advance. The Customs broker then submits the BAPHIQ approval together with other proper documents and duties due for clearance to the Customs office. It takes less than 48 hours to finish inspections/quarantine and/or fumigation and then obtain an approval from the BAPHIQ.

Other products are subject to inspection at random by the Bureau of Standards, Metrology, and

Inspection (BSMI) at the port of entry. A BSMI inspection consists of a sampling of the product for a chemical analysis test. It may take 6 days to complete the inspection.

**Chinese Labeling**

Most importers are hesitant (because of the high risk) to import large quantities in any one shipment. As such, in order to keep costs down they prefer to attach Chinese labels to the product rather than completely re-package in the Chinese language. Once the product has been tried and proven in the market, then discussions regarding complete Chines packaging should be discussed.

**Food & Agricultural Import Regulations and Standards**

For further information please refer to the FAIRS Report (TW2027) at the Foreign Agricultural Service homepage at http://www.fas.usda.gov.

**Section III. Market Sector Structure and Trends**

**Food Processing**

In 2001, the value of Taiwan's food and beverage production was US$ 12.8 billion, acccounting for abouty 70% of the total market demand. Food production has declined over the last five years due to the outbreak of foot and mouth disease in 1997 which had a ripple effect throughout the food and agricultural sector and the overall economic slowdown in Taiwan.

With the opening of the market and import tariff reduction for raw materials after Taiwan's accession into the WTO in January 2002, the domestic food processing industry has benefitted from the market liberalization. However, at the same time imported finished food products have been taking increased market share from domestically produced products since the WTO accession and this trend is expected to continue over the next few years. Taiwan's food processing industry is facing a vigorous competition in the more open environment. The Food Industry Research andDevelopment Institute forecasted an annual growth rate of minus 1.5 for 2002.

Taiwan's food processing sector is estimated to use annually about US$1.2 billion in food ingredients. Imports estimated at US$920 million account for the majority of the market. Major ingredient categories that offer opportunities for U.S. exporters include: snack food and bakery ingredients; gluten, starch, and dextrins; ingredients for high fiber food and low calorie food; soy products; and flavorings.

**Food Retailing Sector**

According to Taiwan's Ministry of Economic Affairs, the total market value of Taiwan's food retail sector in 2001 was US$ 9.6 billion, a 1.4% percent increase from 2000. Taiwan's supermarket industry has reached a plateau after approximately 20 years of rapid expansion since the first store opened in Taiwan in the early 1980's. Hypermarkets (one-stop shopping) and convenience stores (immediate and impulse purchasing) are increasing their market share of total sales at the expense of the supermarkets. It is expected that in coming years the trend towards integrated shopping complexes and hypermarkets will accelerate.

There are currently approximately 1,071 supermarkets in Taiwan. "Wellcome" is the largest retail supermarket chain with currently 114 outlets island-wide. Store expansion has been slow in recent years relative to other retail formats. This is primarily due to the difficulty of the chains in finding suitable locations and the stringent competition on either side from the hypermarkets and convenience stores.

The traditional "mom & pop" stores that long dominated Taiwan’s retail industry (the equivalent of the local "grocery" in the U.S.) are fast losing their market share to the large retail chains such as "7-Eleven" and "Family Mart." According to DGBAS, the annual revenues of Taiwan’s convenience stores in 2001 reached US $3.64 billion, double their levels of 1996. Despite the economic slowdown, 7-Eleven’s performance exceeded expectations, making it the top retailer in 2001. Sales topped US$1.9 billion, a 13 percent increase from 2000. 7-Eleven’s market, with currently over 3,000 outlets island-wide, accounts for 54% of Taiwan’s convenience store market chain, followed by Family Mart (15%), High Life (10%), Circle K (8%), and Niko Mart. The development of Taiwan’s convenience stores present two extremes. The large chains continue to grow at a constant rate while small chains have begun to stagnate.

Hypermarkets were the fastest growing segment of the food retail industry, generating total sales revenues of nearly US $4.74 billion in 2001, a 6% increase from the previous year. The annual growth rate for Taiwan’s hypermarkets over the past six years has averaged 16 percent until 2000. It slowed down in 2001 due to the overall economic slowdown in Taiwan. There are now 110 hypermarkets in Taiwan, some foreign owned (Makro, Carrefour, Geant, Tesco, Costco, Auchan, Casino, and Dairy Farm) and some locally owned and operated.

**Food Service Sector**

Total sales for the food service sector is estimated at US $6.6 billion in 2001. Annual growth over the last ten years has been a stunning 10 percent until 2000. The overall economic slowdown in Taiwan has slowed industry sales, dropping by 12 percent in 2001**.** Taiwan has a well-established entertainment culture that includes restaurants, Japanese-style clubs, pubs, and discotheques. Entertaining in the up-market clubs and restaurants can be lavish and are important end-users of high grade imported food items, such as seafood, wine, and beef. The pub and disco scene is favored by Taiwan’s affluent young consumers who have a high propensity to spend. In this segment of the market, fashion is extremely important and considerable effort is directed at brand promotion and recognition. Major export opportunities include meat products, seafood and wine for upscale dinning venues.

The total number of registered restaurants in 2002 reached 36,443 companies. Chinese restaurants accounted for over 60 percent. Western style restaurants were second in terms of popularity and number of outlets, accounting for 23 percent of the market. Major chains include McDonalds, Pizza Hut, Domino’s, Sizzler, Ponderosa, and KFC. These chains have contributed to demand for western style foods, in particular for U.S. frozen potatoes for fries.

For the international tourist hotels, income from food and beverage sales accounts for almost 50 percent of total operating income. In 2001, in terms of income generated by hotel restaurants, the "Grand Hyatt Hotel" in Taipei, toped the list with US$34 million in sales, followed by the "Grand Formosa Hotel Taipei" (US$32 million), the "Howard Plaza Hotel Taipei" (US$28 million), and the "Lai Lai Sheraton Hotel" (US$25 million). International tourist hotels only consist of four and five star establishments.

**Trends Toward Industry Concentration**

As retailing becomes increasingly competitive, local manufacturers are increasingly establishing vertically integrated supply and distribution operations. This is most noticeable in the convenience store segment of the retail market.

Although the major supermarket and hypermarket chains have all established centralized warehousing operations, this does not apply to fresh produce. Suppliers are required to make deliveries to each individual store. Many importers have no choice in such circumstances but to play the role of importer, distributor, and wholesaler.

In May 1999, the first large integrated shopping mall opened in Taoyuan County south to Taipei. This was the first of a number of such integrated shopping complexes currently under development and which are set to introduce a further shift in retailing patterns. Taiwan Sugar Corporation, which owns large tracts of land in southern Taiwan is also entering the retail mall industry as a way of ensuring profitability prior to its scheduled privatization from a state owned corporation.

It remains to be seen whether consumers readily adapt to the large complexes in the numbers expected. While the malls themselves are air-conditioned and have vast under-cover parking available for mall patrons, Taiwan’s road system remains overcrowded. Much of the convenience of mall shopping may well be lost in the traffic delays of getting to and from the complex. The only certainty is that because retail space in the major urban centers is extremely expensive, increasingly shopping complexes will continue to move to less costly suburban areas.

**Trends in Consumption and Promotion/Marketing Strategies**

In Taiwan’s fiercely competitive retail sector, brand promotion is often "point of sale" oriented. Products branded as "U.S. Origin" are well regarded and the quality of these products is generally well received by consumers. However, constant promotional efforts are needed in order to maintain market share.

Consumers in Taiwan are becoming increasingly health and diet conscious. Low-fat and health foods are surging in popularity. Functional and organic foods are also becoming popular. Local food processors are increasingly looking to promote the nutritional and healthy nature of their products and are seeking out natural food additives and food ingredients with scientifically proven health benefits for local processing.

Taiwan has a strong tradition of gift-giving and food and beverage items are often the gift of the choice.

The three major Chinese festivals: Lunar New Year (usually in February), Dragon Boat Festival (mid-June) and Mid Autumn Festival (September) are the major gift giving seasons. However, gift packs are also routinely given for birthday and special occasions, when visiting friends and relatives or invalids.

At the major festivals, more expensive items are usually provided as gifts. This often includes wines or spirits or expensive food items such as mullet roe and abalone. At other times of the year, fresh fruit or biscuits and cakes are often used as gift items. Properly promoted and packaged , the gift market can commonly represent 10 percent of all sales of a particular item.

**Section IV: Best High Value Product Prospects**

Fresh Fruit
Fresh Vegetables
Processed Fruit and Vegetables
Snacks
Beef
Poultry
Pork Variety Meats
Fish and Seafood
Frozen Products
Wine
Fruit Juices
Dairy Products
Healthy Products
Food Ingredients

**Section V. Key Contacts & Further Information**

**American Institute in Taiwan**

**(Until December 2002)**

| | |
|---|---|
| Organization Name | Agricultural Trade Office |
| Address | 2F, 54 Nanhai Road, Taipei, Taiwan. |
| Telephone | (886-2) 2337-6525; Fax: (886-2) 2305-7073 |
| E-mail | ato@mail.ait.org.tw |
| Internet Homepage | http://ait.org.tw/ait/AGRI/ato.htm |

**Taiwan Central Authority Agencies**

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|---|---|
| Organization Name | Bureau of Standards, Metrology & Inspection (BSMI) |
| Section/Department | 2nd Department |
| Address | 51 Chinan Road, Section 2, Taipei, Taiwan. |
| Telephone | (886-2) 2343-1763; Fax: (886-2) 2393-2324 |

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|---|---|
| Contact Person | Sue Jen Huang, Director |
| E-mail | suejen@bsmi.gov.tw |
| Internet Homepage | **http://www.bsmi.gov.tw** |

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|---|---|
| Organization Name | Bureau of Animal & Plant Health Inspection & Quarantine(BAPHIQ) |
| Section/Department | Plant Quarantine |
| Address | 9F, 51 Chungking South Road, Section 2, Taipei, Taiwan |
| Telephone | (886-2) 2343-1443; Fax: (886-2) 2357-0679 |
| Contact Person | Mr. Chang Hung-yi, Director |
| E-mail | hychang@mail.baphiq.gov.tw |
| Internet Homepage | **http://www.baphiq.gov.tw** |

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|---|---|
| Organization Name | Bureau of Animal & Plant Health Inspection & Quarantine(BAPHIQ) |
| Section/Department | Animal Quarantine/Meat Inspection |
| Address | 9F, 51 Chungking South Road, Section 2, Taipei, Taiwan |
| Telephone | (886-2) 2343-1434 (Hsiao); Fax: (886-2) 2343-1400<br>(886-2) 2343-1475 (Chen); Fax: (886-2) 2343-1400 |
| Contact Person | Mr. Hsiao Tsung-yao, Director, Animal Quarantine<br>Mr. Chen Shih-hsien, Director, Meat Inspection |
| E-mail | **tyhsiao@mail.baphiq.gov.tw**<br>**shchen@mail.baphiq.gov** |
| Internet Homepage | **http://www.baphiq.gov.tw** |

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|---|---|
| Organization Name | Department of Health (DOH) |
| Section/Department | Bureau of Food Sanitation |
| Address | 12F, 102 Aiguo East Road, Taipei, Taiwan |
| Telephone | (886-2) 2393-8209; Fax: (886-2) 2392-9723 |
| Contact Person | Dr. Chen Lu-hung, Director |
| E-mail | fslhcn@doh.gov.tw |
| Internet Homepage | **http://www.doh.gov.tw** |

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|---|---|
| Organization Name | Board of Foreign Trade (BOFT) |
| Section/Department | 1st Department (Import Trade Administration) |
| Address | 1 Hukou Street, Taipei, Taiwan |
| Telephone | (886-2) 2321-2655; Fax: (886-2) 2397-0522 |
| Contact Person | Ms. Fan Shing-huey, Director |

**Major Taiwan Trade Associations**

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|---|---|
| Organization Name | Taiwan Chain Stores and Franchise Association (TCFA) |
| Address | 7F, 197 Nanking East Road, Section 4, Taipei, Taiwan |
| Telephone | (886-2) 2712-1250 ext. 102; Fax: (886-2) 2717-7997 |
| Contact Person | Shirley Huang, Director |

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| E-mail | shirley.huang@tcfa.org.tw |
| Internet Homepage | **http://www.tcfa.org.tw** |
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| Organization Name | Importers & Exporters Association of Taipei (IEAT) |
| Address | 350 Sung Chiang Road, Taipei, Taiwan |
| Telephone | (886-2) 2581-3521; Fax: (886-2) 2542-3704 |
| Contact Person | Jack Huang, Deputy Secretary General |
| E-mail | ieatpe@ms19.hinet.net |
| Internet Homepage | **http://www.ieatpe.org.tw** |
| | |
| Organization Name | Kaohsiung Importers & Exporters Association |
| Address | 4F, 472 Chung Shan 2nd Road, Kaohsiung, Taiwan. |
| Telephone | (886-7) 241-1191; Fax: (886-7) 201-6193 |
| Contact Person | Mr. Lee Chun-sung, Chairman |
| E-mail | kieanet@ms15.hinet.net |
| | |
| Organization Name | Importers & Exporters Association of Taichung |
| Address | 7F, 2-3 Wu Chuan Road, Taichung, Taiwan |
| Telephone | (886-4) 2223-2327; Fax: (886-4) 2223-2360 |
| Contact Person | Mr. Hsieh Feng-hsiang, Chairman |
| E-mail | ieat.service@msa.hinet.net |
| | |
| Organization Name | Taiwan Confectionery, Biscuit & Floury Food Association |
| Address | 9F-1, 390 Fu Hsing South Road, Section 1,Taipei, Taiwan |
| Telephone | (886-2) 2704-1662; Fax: (886-2) 2708-4429 |
| Contact Person | Mr. Jenfei Fan, Chairman |
| E-mail | Tcbffa@ms37.hinet.net |
| | |
| Organization Name | Taiwan Regional Asso.of Frozen Vegetable & Fruit Manufacturers |
| Address | 11F-1, 103 Chung Cheng 4th Road, Kaohsiung, Taiwan |
| Telephone | (886-7) 281-3544; Fax: (886-7) 281-5441 |
| Contact Person | Mr. Shih Fu-yuan, Secretary General |
| E-mail | vegtwn@ms29.hinet.net |
| | |
| Organization Name | Taiwan Association of Frozen Food Industries |
| Address | 147-11 Wu-fu 2nd Road, Kaohsiung, Taiwan |
| Telephone | (886-7) 241-2053; Fax: (886-7) 241-2055 |
| Contact Person | Dollas Shen, Secretary General |
| E-mail | fropre@ksps.seed.net.tw |
| | |
| Organization Name | Taiwan Frozen Seafood Industries Association |

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|---|---|
| Address | 8F, 103 Chun Cheng 4th Road, Kaohsiung, Taiwan |
| Telephone | (886-7) 241-1894; Fax: (886-7) 251-9603 |
| Contact Person | Mr. Hsu Juh-ing, Secretary General |
| E-mail | **tfsia@ms33.hinet.net** |

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|---|---|
| Organization Name | Taiwan Imported Food Association |
| Address | 1F, 6, Lane 37, Kuang-rong Street |
| Telephone | (886-7) 551-9511; Fax: (886-7) 561-2999 |
| Contact Person | Mr. Liu Kuo-lung, Chairman |

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| Contact Person | Mr. Yang Wen-ben, Chairman |
| Organization Name | Taiwan Supermarket Association |
| Address | 23 Mei-chuan West Road, Section 1, Taichung, Taiwan |
| Telephone | (886-4) 2372-6181; Fax: (886-4) 2375-0574 |
| E-mail | **wbyang@mail.sinon.com.tw** |

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|---|---|
| Organization Name | Taiwan Vegetable Oil Manufacturers Association |
| Address | 6F, 27 Chang-an East Road, Section 1, Taipei, Taiwan |
| Telephone | (886-2) 2561-6351; Fax: (886-2) 2562-1745 |
| Contact Person | Daniel Yang, Secretary General |
| E-mail | **tvoa@gcn.net.tw** |

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|---|---|
| Organization Name | National Animal Industry Foundation |
| Address | 4F, 14 Wen-chou Street, Taipei Taiwan |
| Telephone | (886-2) 2363-8724; Fax: (886-2) 2362-0577 |
| Contact Person | Mr. Chuang Ming-cheng, Executive Director |

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|---|---|
| Organization Name | Taiwan Poultry Processing Association |
| Address | 9F-A, 177 Hoping East Road, Section 1, Taipei, Taiwan |
| Telephone | (886-2) 2391-5790; Fax: (886-2) 2321-4781 |
| Contact Person | James Chuo, Secretary General |

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|---|---|
| Organization Name | Swine Association |
| Address | 12F-1, 6 Jen-ai Road, Section 1, Taipei, Taiwan |
| Telephone | (886-2) 2351-1831; Fax: (886-2) 2396-4361 |
| Contact Person | Mr. Yeh Lee-tze, Secretary General |
| E-mail | **rocswine@ms26.hinet.net** |

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|---|---|
| Organization Name | ROC Poultry Association |

Address 2F, 192 Nan-chang Road, Section 2, Taipei, Taiwan
Telephone (886-2) 2367-7595; Fax: (886-2) 2365-5342
Contact Person Mr. C.W. Feng, Secretary General
E-mail **poultry@tpts6.seed.net.tw**

Organization Name China External Trade Development Council (CETRA)
Address 5F, CETRA Tower, 333 Keelung Road, Section 1, Taipei, Taiwan
Telephone (886-2) 2725-5200; Fax: (886-2) 2757-6443
Contact Person David Liu, Executive Director, Market Development Department
E-mail **davidliu@cetra.org.tw**

## EXPORTER GUIDE
## APPENDIX I. STATISTICS

| **Table A. Key Trade & Demographic Information** | | |
|---|---|---|
| Agricultural Imports from All Countries ($Mil)/U.S. Market Share (%) 1/ | $6,851 | 35% |
| Consumer Food Imports From All Countries ($Mil)/U.S. Market Share (%) 2/ | $1,015 | 52% |
| Edible Fishery Imports From All Countries ($Mil)/U.S. Market Share (%) 3/ | $211 | 13% |
| Total Population (Millions)/Annual Growth Rate (%) 4/ | 22.4 | 0.6% |
| Urban Population (Millions)/Annual Growth Rate (%) 5/ | 15.4 | 0.7% |
| Number of Major Metropolitan Areas 6/ | 7 | |
| Size of the Middle Class (Millions)/Growth Rate (%) 7/ | 13.5 | 60% |
| Per Capita Gross National Product (U.S. Dollars) 8/ | $12,876 | |
| Unemployment Rate (%) 9/ | 4.6% | |
| Per Capita Food Expenditures (U.S. Dollars) 10/ | $1,677 | |
| Percent of Female Population Employed 11/ | 46.1% | |
| Exchange Rate 12/ | NT$33.75 | |

| | | |
|---|---|---|
| 1/ Agricultural Trade Statistics of the ROC (Council of Agriculture) 2001 data | | |
| 2/ UN Trade Data 2001 | | |
| 3/ UN Trade Data 2001 | | |
| 4/ Directorate General of Budget, Accounting, and Statistics (DGBAS) data 2001 | | |
| 5/ Ministry of Interior Affairs (MOI) Data 2001 | | |
| 6/ MOI data 2001 | | |
| 7/ ATO Taipei estimate 2001 | | |
| 8/ DGBAS data 2001 | | |
| 9/ DGBAS data 2001 | | |
| 10/ DGBAS data 2001 | | |
| 11/ DGBAS data 2001 | | |
| 12/ Average exchange rate for 2001 | | |

## Table B. Consumer Food & Edible Fishery Product Imports

| Taiwan Imports (US$Million) | Imports from the World | | | Imports from the U.S. | | | U.S. Market Share | | |
|---|---|---|---|---|---|---|---|---|---|
| | 1999 | 2000 | 2001 | 1999 | 2000 | 2001 | 1999 | 2000 | 2001 |
| CONSUMER-ORIENTED AGRICULTURAL TOTAL | 1,836 | 1,846 | 1,015 | 581 | 577 | 530 | 32% | 31% | 52% |
| Snack Foods (Excl. Nuts) | 82 | 88 | 49 | 12 | 12 | 14 | 14% | 14% | 29% |
| Breakfast Cereals & Pancake Mix | 10 | 11 | 5 | 1 | 2 | 2 | 15% | 20% | 47% |
| Read Meats, Fresh/Chilled/Frozen | 282 | 267 | 163 | 91 | 98 | 61 | 39% | 37% | 60% |
| Red Meats, Prepared/Preserved | 9 | 7 | 4 | 7 | 5 | 4 | 71% | 62% | 85% |
| Poultry Meat | 22 | 20 | 14 | 19 | 20 | 14 | 89% | 97% | 99% |
| Dairy Products (Excl. Cheese) | 218 | 225 | 128 | 10 | 14 | 15 | 5% | 6% | 11% |
| Cheese | 20 | 23 | 10 | 2 | 1 | 2 | 11% | 7% | 24% |
| Eggs & Products | 6 | 5 | 3 | 0.2 | 0.5 | 0.3 | 4% | 10% | 12% |
| Fresh Fruit | 282 | 289 | 177 | 166 | 176 | 158 | 59% | 61% | 90% |
| Fresh Vegetables | 35 | 39 | 37 | 17 | 22 | 27 | 49% | 56% | 73% |
| Processed Fruit & Vegetables | 141 | 143 | 67 | 80 | 75 | 58 | 57% | 53% | 87% |

| | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Fruit & Vegetable juices | 27 | 24 | 10 | 7 | 8 | 7 | 27% | 32% | 69% |
| Tree Nuts | 40 | 43 | 12 | 10 | 14 | 9 | 24% | 33% | 78% |
| Wine & Beer | 99 | 91 | 40 | 25 | 23 | 20 | 25% | 25% | 50% |
| Nursery Products & Cut Flowers | 28 | 27 | 2 | 0.2 | 0.2 | 0.2 | 0.80 % | 0.63% | 10% |
| Pet Foods (Dog & Cat Food) | 33 | 34 | 19 | 7 | 9 | 9 | 22% | 26% | 47% |
| Other Consumer-Oriented Products | 502 | 509 | 276 | 126 | 98 | 129 | 25% | 19% | 47% |
| | | | | | | | | | |
| FISH & SEAFOOD PRODUCTS | 658 | 651 | 211 | 42 | 44 | 28 | 6% | 7% | 13% |
| Salmon | 35 | 36 | 15 | 2 | 0.7 | 1 | 5% | 2% | 7% |
| Surimi | 24 | 19 | 6 | 6 | 4 | 6 | 25% | 22% | 92% |
| Crustaceans | 307 | 310 | 102 | 12 | 17 | 10 | 4% | 6% | 10% |
| Groundfish & Flatfish | 97 | 101 | 31 | 4 | 3 | 1 | 4% | 3% | 3% |
| Molluscs | 92 | 70 | 22 | | | | | | |
| Other Fishery Products | 104 | 115 | 35 | 16 | 16 | 10 | 15% | 14% | 28% |
| AG PRODUCTS TOTAL | 4,159 | 4,177 | 2,829 | 1,955 | 2,002 | 2,015 | 47% | 48% | 71% |
| AG, FISH & FORESTRY TOTAL | 5,705 | 5,702 | 3,468 | 2,082 | 2,127 | 2,110 | 36% | 37% | 61% |

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

## Table C. Top 15 Suppliers of Consumer Foods

**Taiwan Imports**
**Consumer-Oriented Ag Total (US$1,000)**

| | 1999 | 2000 | 2001 |
|---|---|---|---|
| United States | 580,622 | 577,290 | 529,549 |
| Australia | 240,988 | 220,512 | 217,101 |
| France | 56,601 | 42,444 | 49,752 |
| Korea, Republic of | 46,164 | 47,204 | 42,637 |

| | | | |
|---|---|---|---|
| Malaysia | 39,855 | 39,999 | 37,571 |
| Denmark | 27,575 | 28,504 | 36,893 |
| Singapore | 22,216 | 26,940 | 21,853 |
| Italy | 13,881 | 16,148 | 20,038 |
| Indonesia | 19,931 | 21,776 | 17,155 |
| United Kingdom | 15,555 | 13,914 | 15,720 |
| Belgium | 9,407 | 12,121 | 14,589 |
| Hong Kong | 10,162 | 10,736 | 9,034 |
| Finland | 1,815 | 1,945 | 2,088 |
| Hungary | 800 | 1,259 | 738 |
| Norway | 153 | 140 | 181 |
| Other | 750,123 | 785,265 | 204 |
| TOTAL | 1,835,848 | 1,846,197 | 1,015,103 |

Source: United Nations Statistics Division

## Table C. Top 15 Suppliers Edible Fishery Products

**Taiwan Imports**
**Fish & Seafood Products (US$1,000)**

| | 1999 | 2000 | 2001 |
|---|---|---|---|
| Australia | 111,514 | 120,892 | 84,761 |
| United States | 41,520 | 44,323 | 28,267 |
| Indonesia | 25,301 | 31,259 | 20,486 |
| Iceland | 13,899 | 17,250 | 17,105 |
| Singapore | 19,540 | 20,181 | 16,499 |

| | | | |
|---|---|---|---|
| Norway | 35,934 | 33,615 | 16,470 |
| Denmark | 25,351 | 18,399 | 13,325 |
| Korea, Republic of | 4,539 | 10,807 | 6,090 |
| Malaysia | 4,853 | 5,443 | 5,138 |
| Peru | 10,895 | 4,753 | 1,065 |
| United Kingdom | 174 | 688 | 658 |
| France | 154 | 361 | 411 |
| Hong Kong | 239 | 489 | 166 |
| Italy | 0 | 0 | 100 |
| Belgium | 150 | 47 | 17 |
| Other | 364,066 | 342,793 | 0 |
| TOTAL | 658,129 | 651,300 | 210,558 |

Source: United Nations Statistics Division