USDA Foreign Agricultural Service
GAIN Report
Global Agricultural Information Network

Required Report - public distribution

Date: 12/16/2015
GAIN Report Number: TW15049

Taiwan

Food Service - Hotel Restaurant Institutional

Food Service Growth Shows No Signs of Slowing Down

Approved By:
Mark Ford
Prepared By:
Cleo Fu

Report Highlights:
The food service revenue in Taiwan increased for the ninth year in a row to NT$413 billion (US$13 billion) in 2014, up 3.1 percent from the previous year. A further confirmation of the sector's continued success, several international food service chains recently opened their first Taiwan outlet. Post anticipates Taiwan's food service sector should continue to grow over the next decade due to an increase in tourism, which serves as the backbone of the food service sector throughout Taiwan. This increase can also be attributed to several other factors as well, including the rise in consumer income, smaller family size, increasing numbers of working women and the development of web marketing.

Post: Taipei ATO

Commodities:

SECTION I. MARKET SUMMARY

Macro-economic Situation

Although it is a small island (about the size of Maryland and Delaware combined) with a population of only 23.5 million people, Taiwan has developed into one of the world's largest economic and trading entities. Over the past decade, Taiwan has transformed itself from a light industry-manufacturing base to a global center for the production of high technology products. With a nominal Gross Domestic Product (GDP) of $529.6 billion in 2014, Taiwan is the world's 21st largest economy, as well as the 6th largest economy in Asia. In 2014, Taiwan had an estimated per capita GDP of US$22,632 (US$43,600 when calculated in terms of Purchasing Power Parity). Overall, Taiwan is our 11th largest trading partner and our 15th largest export market (as of 2014).

Since the Taiwan economy is heavily dependent on exports, a drop in demand from its key export markets such as Europe and the United States has impacted economic growth. With exports posting slow growth, Taiwan's economy grew by 3.77 percent in 2014. For 2015, Taiwan's official forecast is for GDP to grow by about 1.06 percent. Inflationary pressures remain moderate, and the official estimation of consumer prices increased by 1.2 percent in 2014. Taiwan currently has the sixth-largest foreign exchange reserves in the world, with U.S. $423.9 billion as of December 2014. The New Taiwan dollar (NTD) exchange rate closed at NT$31.72 per USD at 2014 year-end from NT$29.95 at 2013 year-end.

Taiwan is the largest investor in mainland China, where Taiwan companies have invested heavily in electronic parts and components, computers and optoelectronics, electrical equipment, metal products, plastics, food processing and other sectors. Official reports place the level of investment at U.S. $143.96 billion as of 2014, but unofficial estimates speculate the amount may be two to three times higher. Taiwan firms located in China are among China's largest exporters.

On June 29, 2010, Taiwan and China concluded the Economic Cooperation Framework Agreement (ECFA), a pact designed in part to help Taiwan exporters stay competitive with the Association of Southeast Asian Nations (ASEAN) following the signing of the "ASEAN plus 1" trade agreement with China. ECFA is a preferential trade agreement designed to reduce barriers to trade and investment gradually. Taiwan also signed a free trade pact with Singapore (ASTEP) and New Zealand (ANZTEC) respectively in 2013.

Key Economic and Social Indicators			
	2012	**2013**	**2014**
GDP (Billion US$)	495.8	511.3	529.5
GDP (US$ / per capita)	21,308	21,902	22,632
PPP: US$ (estimated by IMF)	40,191	41,539	43,600
Average Disposable Income (US$ / per Household)	31,699*	31,459*	30,165*
Restaurants and Hotels Expenditure (%, per Household)	10.58	10.57	11.08
Average Annual Exchange Rate (1US$ to NT$)	29.136	29.950	31.72

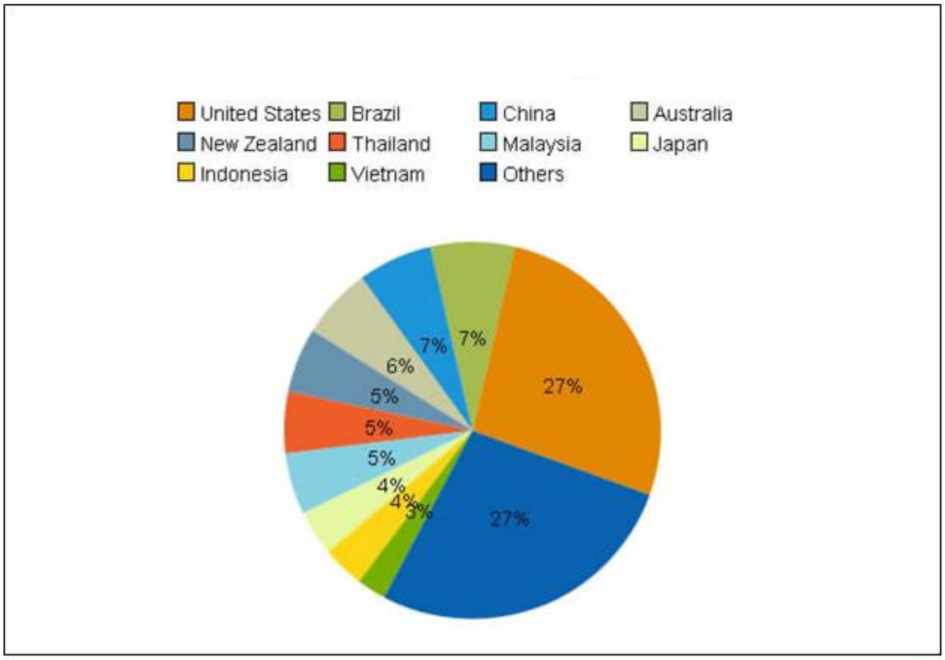
Consumer Price Index	1.93	0.79	0.60
Unemployment Rate (%)	4.24	4.18	3.96
Economic Growth Rate (%)	2.06	2.23	3.74
Total Agri-Food Imports (billion US$)**	13.19	13.21	13.84
Total Agri-Food Exports (billion US$)**	4.10	4.14	4.33
Agri-Food Imports as a Share of Total Imports (%)	4.87	4.90	5.07

Source: Taiwan Director-General of Budget, Accounting, and Statistics (DGBAS); Council of Agriculture (COA)
*Please note that the 2013 and 2014 value declined in US dollar basis resulted from the high U.S. vs. Taiwan currency exchange rate of the year 2014. The actual value in NT dollar in both 2013 and 2014 increased.
**Total Agricultural, Fish, Forestry, Group 1

Agricultural Trade

Although Taiwan is an economic powerhouse, domestic agricultural production is somewhat limited. As a result, Taiwan is increasingly reliant on imports of food and other agricultural products. The United States has long been the major supplier of Taiwan's agri-food imports, followed by emerging South American supplier Brazil, Australia, New Zealand, Thailand and China. In 2014, Taiwan imported US$3.74 billion dollars of food and agricultural products (including fish and forestry products) from the United States, accounting for about 27.06 percent of Taiwan's total agri-food imports. Of the U.S. total, nearly US$1.8 billion was comprised of bulk commodities, including corn, soybeans and wheat. Other major food imports include meat and poultry products, dairy, fresh fruits and vegetables, alcohol and beverage.

Taiwan Import Statistics
Commodity: Agricultural, Fish & Forestry
Calendar Year: 2014

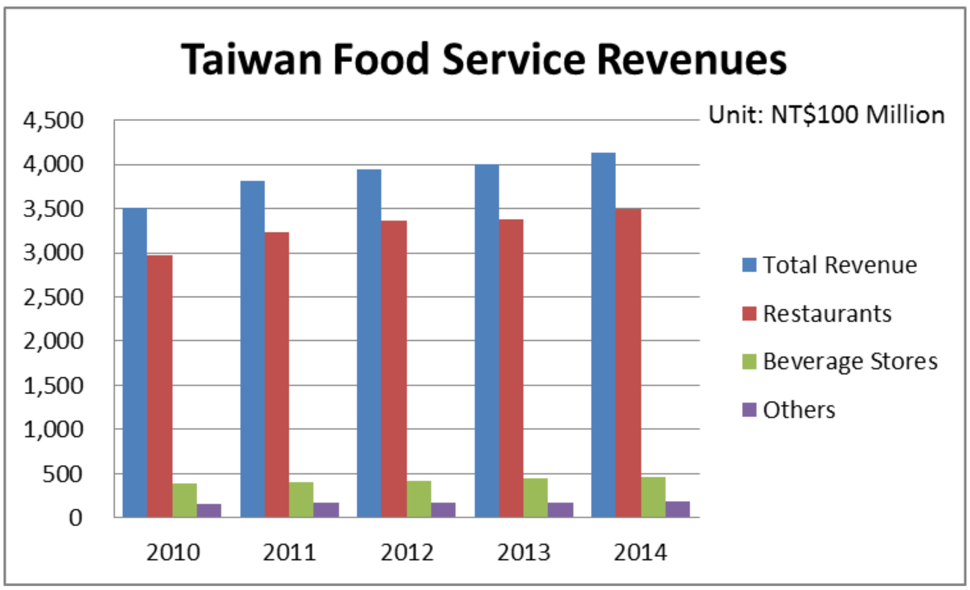


Source: Global Trade Atlas

Taiwan Food Service Sector Overview and Trends

People in Taiwan love to eat out! Eating out is also very much a part of the food culture in Taiwan. That statement was included in the 40th Fiscal Term Interim Business Report of popular fast-food chain MOS Burger, but most Taiwan consumers and foodservice managers and investors would agree.

According to Taiwan's Ministry of Economic Affairs (MOEA), the economic output of Taiwan's food service sector, excluding institutional food service, is estimated at US$13.02 billion in 2014, a 3.1 percent increase from the previous year. The continued prosperity of the tourism market has helped drive up food service sector revenue, which is expected to continue to grow over the next decade. This increase can also be attributed to other several factors, including the rise in consumer income, smaller family size, increasing numbers of working women and the development of web marketing.



Source: Taiwan Ministry of Economic Affairs (MOEA)

Employment History of Married Women Unit: %		
Year	Had a job before marriage	Have a job currently
1990	72.24	46.93
2000	82.08	49.73
2003	80.82	50.54
2006	84.36	52.55
2010	83.85	54.47
2013	83.39	55.93

Source: Taiwan Director-General of Budget, Accounting, and Statistics (DGBAS)

Taiwan consumers enjoy a very diverse food environment. In addition to traditional Chinese food cuisines, Japanese BBQ (Yakiniku), hot pot (shabu shabu), Thai foods, Italian cuisines, western fast foods and several other ethnic varieties are seen all around the country. As food trends change swiftly, however, many of these cuisines do not stay popular for long, and only a few types of cuisines gradually become fully integrated into local food culture.

Street food and snacks are also signature features of Taiwan's food culture. Night markets with hundreds of food options are common island-wide. Food stands in the night markets use a wide variety of food ingredients -- imported and locally produced. For example, French fries produced in the U.S. and Canadian Pacific Northwest are offered side by side with locally produced sweet potato (yam) fries in the deep-fried food stands (yan su ji).

Discounted gift certificates and coupons sold online (such as Groupon and Gomaji), online reservation platform (such as EZTABLE, Doggybag and mobile apps), and tourism promotion exhibitions also helped boost restaurant exposure and sales the past few years. Nearly 80 percent of restaurant operators responded to a MOEA survey that pre-sold coupons increased their profitability. Many small-operation restaurants have also become popular “overnight” due to their products' wide exposure on these websites and at events.

An EOLembrain's consumer survey (2013) showed that around 23 percent of online shoppers purchased food and beverage products online. Online shopping continues to soar, thanks to the fast development of express delivery services and is likely to create more opportunities and sales for the food industry as well as hotels and restaurants. Greater efficiency and better customer service at online shopping websites is expected to help generate strong customer satisfaction and increase the popularity of online shopping

- **Internationalization**

It was not until the end of last century that Taiwan’s food service companies began to venture beyond the Taiwan border. Investment liberalization in China was the most crucial factor in encouraging Taiwan's hospitality industry to test the water in China. In recent years, following their success in the China market, several Taiwan food service operations expanded their territories to Northeast and Southeast Asia or even Europe and North America. As market entry restrictions and other challenges decline relative to many high-tech product sectors, the globalization of Taiwan's foodservice may expand further.

- **Tourism on the rise**

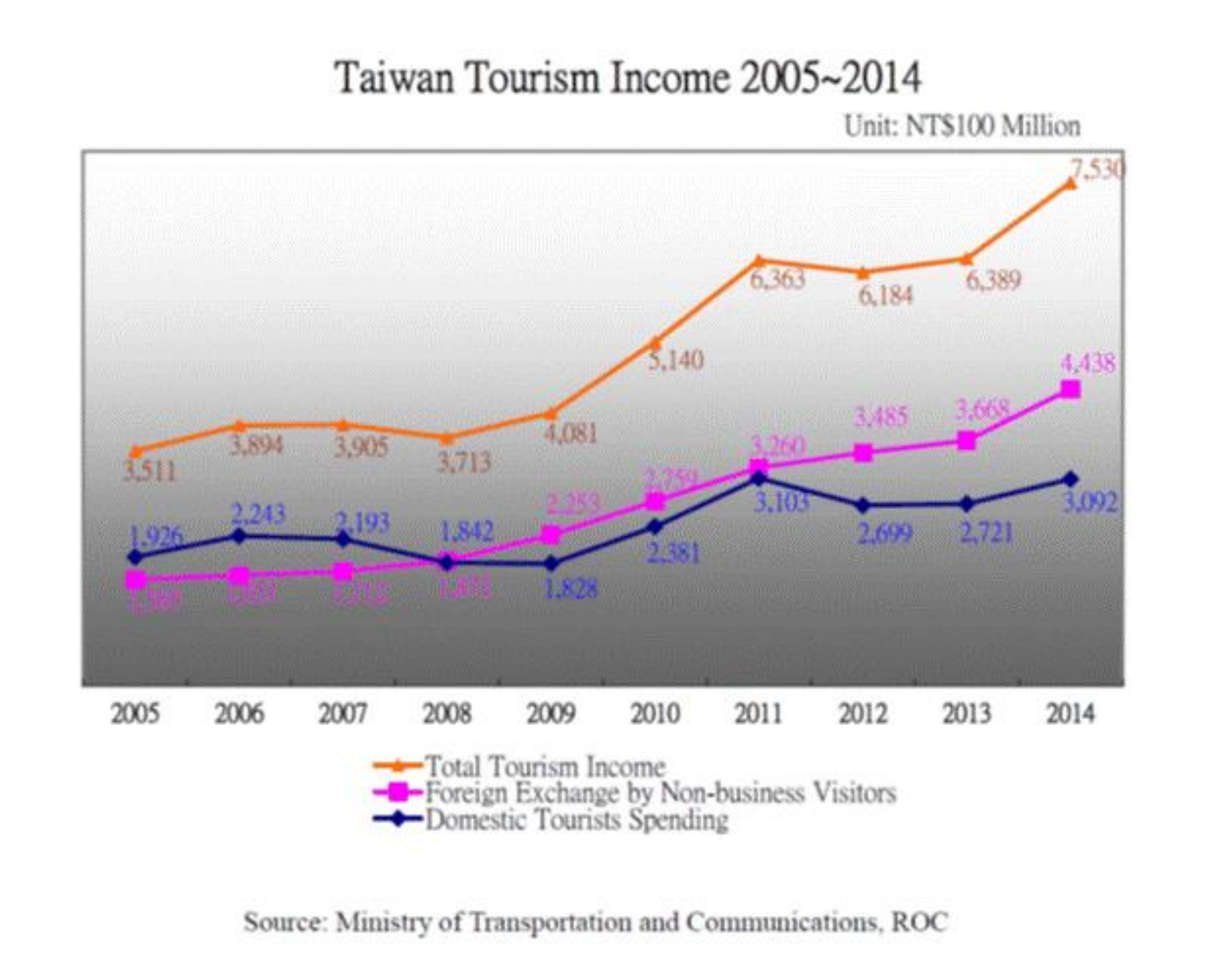
Together with Taiwan's high-tech sectors, tourism is regarded as one of the star industries by the Taiwan government in terms of creating jobs and earning foreign exchange. The government has invested billions of dollars on the improvement of transportation between major cities and famous tourist spots, as well as other travel facilitation programs to maximize convenience for travelers, making travel within the island easier for both domestic and foreign tourists.

The Government's tourism policy is the savior of the foodservice sector to counter the population decline. As part of Taiwan government's National Development Plan, the Ministry of Transportation and Communications (MOTC) launched the "Double Tourist Arrivals Plan" in 2002. The goal was to double the number of international tourist arrivals, which would deliver obvious benefits in creating jobs and earning foreign exchange. Other than the neighboring countries such as South Korea, Japan and China, North America and European countries are also Taiwan's goal to open its tourism market.

Advertisement of Taiwan on a bus in New York City. Photo by Cleo Fu.

According to statistics released by the MOTC, the number of foreign arrivals to Taiwan increased significantly since 2005, more than threefold to over 9.9 million in 2014, including 7.2 million tourists. In 2014, cross-Strait air passenger traffic also surged by 16.26 percent to 9.36 million persons year on year, reflecting a larger numbers of tourists from China and increasing travel by Taiwan companies investing in China. The explosive growth of direct charter flights across the strait generated major profits for Taiwan's airline companies and air-catering businesses, which had seen sluggish sales for several years due to the completion of Taiwan's high-speed rail that connects major cities throughout the island.

MOTC statistics also indicate that spending by foreign tourists, since 2008, has exceeded the total tourism expenditures of domestic tourists. In 2014, Taiwan's foreign exchange earnings from tourism reached US$14.6 billion, up 4.68 percent from the previous year. This trend is expected to continue the next several years. ATO Taipei estimates that, based on a 2014 Taiwan Tourism Bureau survey, food and beverage expenditures by foreign tourists (non-business visitors) accounted for 20 percent of total expenditures and generated an additional US$2.9 billion for the local food industry.



- **Foodservice-Retail Marketing Alliance**

With one store per 2,300 people, Taiwan has the highest convenience stores density in the world. Taking this advantage, the foodservice operations started to work with convenience store chains to provide oven-prepared, microwavable meals, bakery products and other processed food products via these retail channels' express delivery services. On the other hand, convenience store chains also welcome this win-win cooperation which generates extra income.

- **Convenience Store Transformation**

Convenience stores in Taiwan have become even more "convenient" than a few years ago. With a 24-hour operation, when other retail stores are closed, consumers can now do nearly anything they need, including: paying utility and cell phone bills, printing concert tickets, collecting packages and dry cleaning, and much more. Approximately five years ago, 7-11 in Taiwan renovated some of its stores to provide a seating place for its customers. Consumers in a hurry can simply sit down in the stores and enjoy a microwaved meal and freshly brewed coffee. This transformation has allowed 7-11 to replace McDonald's as the largest foodservice operation in Taiwan. According to 7-11, the company's income from the "Foods to Go" and "Fresh Food" category (including: lunch boxes, ice cream, and all kinds of microwaveable foods) makes up approximately 25 percent of its total revenue, which was over US$1 billion in 2014. As of March 2015, 7-11 has 5,038 stores in Taiwan, accounting for over 49 percent of market share. Given its success, other convenience store chains recently duplicated this same model in order to stay competitive.

Advantages and Challenges for U.S. Exporters

Advantages	Challenges
Consumers are strongly attracted by novelty and fashion in food products and services.	U.S. exporters face low price competitors in areas such as juice and vegetables.
Taiwan consumers maintain a generally positive perception of and consume many U.S. food and agricultural products.	High market fragmentation makes it hard for U.S. exporters to achieve scale and scope advantages in terms of volume.
Taiwan is highly dependent on agricultural imports from the United States, particularly grain and oilseed products.	Taiwan is the United State's 7th largest market for agricultural exports, but is often overlooked by U.S. suppliers eager to export directly to mainland China.
Taiwan importers are familiar with and trust U.S. grading systems, e.g. beef grading standards.	U.S. exporters are sometimes reluctant to change product specifications to comply with Taiwan requirements and market demand factors.
Taiwan consumers are brand-conscious and America is a leader in food brands that set trends.	Many U.S. companies are unwilling to provide low volume, consolidated shipments of high-value products to food service companies.
A wide variety of U.S. chains or American-themed restaurants in Taiwan provide opportunities to sample "authentic" American cuisine and beverages.	Geographically, the U.S. is much farther from Taiwan than many major competitors, and the lack of direct air links by major American airlines reduces the profile of Taiwan to U.S. exporters.
The popularity of American holidays and culture/lifestyle lead to promotional events organized around these themes by Taiwan restaurants and hotels throughout the year.	Taiwan's emerging "green" tendencies have a potential to favor domestic foods by discouraging the consumption of imported foods and reducing the "carbon footprint" associated with imported products.
Taiwan's population is highly educated, well-traveled and extremely aware of global foodservice brands.	Taiwan's birth rate is among the lowest in the world, and population growth is expected to become negative in coming years.
Taiwan enjoys higher purchasing power and a growing tourism sector.	Taiwan consumers maintain a preference for "fresh" food products over "frozen."
Increasing growth of fast food chains and casual dining restaurants is key to sector growth.	Taiwan food labeling scandals and concerns over food safety hinder the growth in foodservice sector.
High-end American beef are well-accepted by consumers.	

SECTION II. ROAD MAP FOR MARKET ENTRY

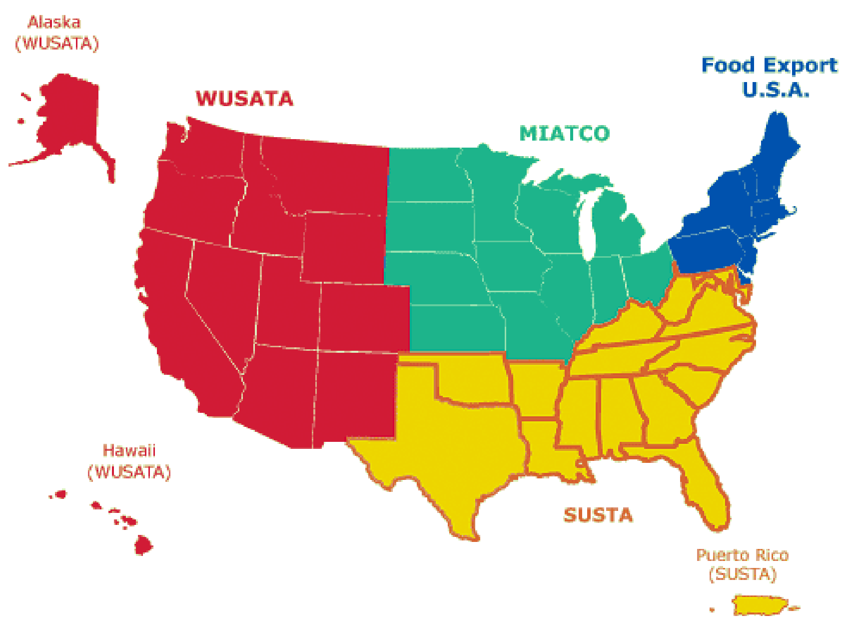
Due to the limited size of their operations, the majority of Taiwan's HRI companies do not import directly. Rather, they tend to place small but more frequent orders with local suppliers that are able to meet such needs. Consequently, U.S. companies should concentrate on establishing business relationships with reliable and efficient importers and distributors, who in turn, sell to HRI end users.

Price is still the primary concern for most HRI buyers while quality and packaging come into play if the price is agreeable. Very few HRI businesses operate on exclusive contracts with suppliers. As a result, most chain and independent restaurants change suppliers frequently, particularly if there is a price difference.

Small to medium size exporters should work with the appropriate U.S. State Regional Trade Group (SRTG) to take advantage of the SRTG's resources for marketing and promotion support in major export markets. The four SRTGs are non-profit trade development organizations that help U.S. food producers, processors and exporters sell their products overseas. They are jointly funded by USDA's Foreign Agricultural Service (FAS), the individual state departments of agriculture and private industry. The SRTGs provide export assistance to companies located in their geographic region through a variety of export programs and integrated marketing services. To learn more services available from the SRTGs, find the SRTG for your geographic region in the list below and visit the website.

Western U.S. Agricultural Trade Association (WUSATA)

- Southern U.S. Trade Association (SUSTA)
- Food Export-Midwest (previously named MIATCO) (Food Export)
- Food Export-Northeast (Previously named Food Export USA) (Food Export)



Market Structure

The majority of HRI companies in Taiwan purchase most of their food products from importers, distributors, wholesalers, regional wholesale markets, wet markets, and supermarkets/hypermarkets, depending on the type of food item. Imported fresh items such as produce, fish/seafood and beef, are usually purchased and delivered directly from importers or through distributors or wholesalers. Institutional users buy more products from local distributors or import directly. A recent trend is that retail outlets such as Costco are frequented by many small food service/HRI operators to buy items in quantity at the lowest possible cost, thereby avoiding the hassle of trying to source small volumes via traditional import channels.

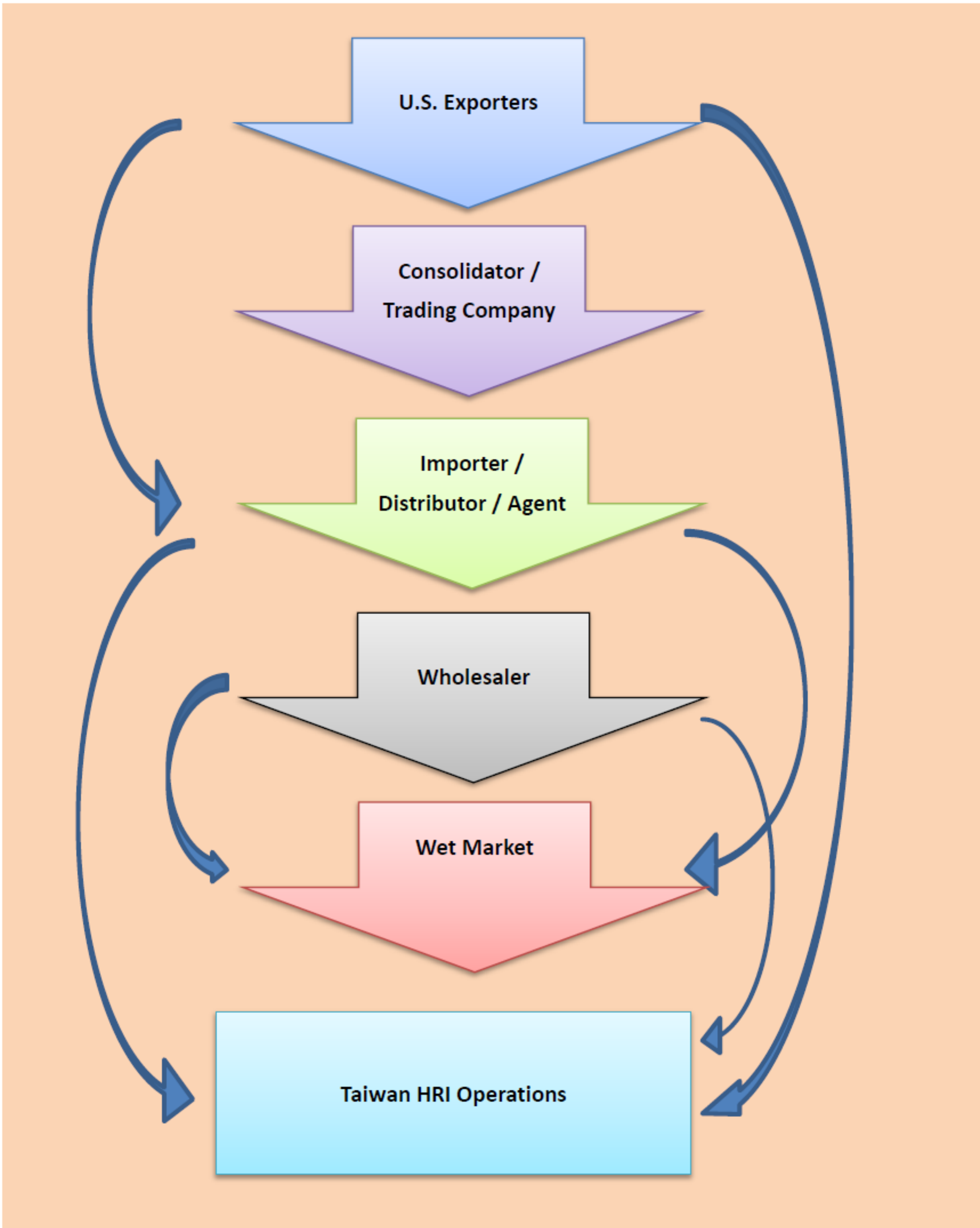
Food and beverage managers and executive chefs at international hotels are the key persons who decide which items are purchased. The purchasing department procures various food ingredients based on the list that F&B section provides. Hotels, especially those that employ foreign chefs or offer authentic foreign cuisines, and other high-end family style restaurants typically use more imported items from importers or wholesalers/distributors.

Western and local fast food restaurant chains usually have their own distribution centers or they contract with an independent distribution center to purchase, partly process and deliver the daily needs to each outlet island-wide. Fast food chains also maintain their own R&D team or work closely with one or more contracted regional catering service(s) to develop and frequently renew menus to meet consumers' demand.

Medium-level family style chain restaurants generally maintain a centralized purchasing department and a centralized kitchen as well. The centralized kitchen prepares meals, including bakery products, and delivers the foods to all outlets of the restaurant chain.

Other smaller-scale drinking and eating establishments purchase the majority of their daily needs from wholesalers, regional wholesale markets or wet markets.

Taiwan HRI Distribution Channel Flow Diagram



Sub-Sector Profiles

1. Hotels and Resorts

Socializing in hotel restaurants has been a popular practice in Taiwan. As a result, hotel restaurants have become an important dollar earner for Taiwan's international hotels, accounting for 43.6 percent of total operating income (Source: Taiwan Tourism Bureau 2014 data). In 2014, in terms of F & B income generated by hotel restaurants, the Grand Formosa Regent Hotel Taipei topped the list with US$51.2 million, followed by the Sheraton Taipei (US$45.0 million), the "Grand Hyatt Taipei" (US$34.85 million), and the Ambassador Hotel (US$34.17 million).

Taiwanese people often entertain their business counterparts, friends and relatives in restaurants, especially on special occasions such as weddings/engagements, birthdays, Mother's Day, "Honorary Banquets in Praise of Teachers", Lunar year-end parties hosted by company management, and Chinese New Year Eve Dinner. Food served at these occasions tends to be either Western-style buffets or Chinese-style food banquets. In addition, holiday celebrations are becoming more and more commercialized, especially western holidays such as Christmas, Thanksgiving, Independence Day (American Week Food Promotions), Oktoberfest and Valentine's Day. Taiwan's hotel restaurants use these occasions to aggressively promote set menus, offering excellent opportunities to promote American foods and beverages. U.S. companies with products used principally in the HRI sector should consider how to take advantage of these promotional opportunities by developing recipes, special menus or merchandise to help draw in the different group.

In addition to the general food service business, hotels in Taiwan have also focused in recent years on specific gift food packages for various festivals, such as moon cake gift packs for the Moon Festival, chocolate gift packs for Valentines' Day and turkey hampers for Thanksgiving. The development of domestic courier services is also credited for the rapid growth of the gift-pack market.

Resorts in Taiwan, classified by areas of focus, fall primarily into the categories of hot spring towns, scenic areas, cultural sites and amusements parks. With the completion of the freeway system connecting metropolitan Taipei and Taiwan's east coast, many real estate developers have built or are building high end resorts in major hot spring towns and scenic spots in this area. Most of the resorts manage the food venues themselves and purchase primarily through importers and distributors.

As of December 2015, 40 hotels with over 9,300 rooms were under construction in Taiwan. The total investment of these hotels is estimated at US$26.4 billion (Source: Taiwan Tourism Bureau).

Hotels Targeted to Open in 2015~2016				
Estimated Year of Completion	Name	Area	Estimated Capital	Rooms

			(US$ Million)	
2015	Mandarin Oriental Hotel Taipei	Taipei City	397.2	303
	Silks Place Tainan	Tainan City	218.7	255
	Crowne Plaza Tainan	Tainan City	63.1	193
	Hotel Orchard Park	Taoyuan City	48.9	187
	The Walden	Yilan County	19.7	100
Subtotal	5		747.6	1,038
2016	Maison de Chine	Yilan County	20.0	182
	Sheraton Yilan Resort	Yilan County	56.7	193
	Hon Lin Hotel	Taichung City	12.6	80
	Regal Hotel Kenting	Pingtung County	31.2	242
	Taipei Ching Cheng Howard Hotel	Taipei City	9.5	199
	Spring Park Jiaoshi Villa Resort	Yilan County	35.3	84
	Shangri-La Boutique Hotel	Yilan County	41.5	146
	The Resort Dancewoods	Yilan County	43.5	105
	Ludao Hotel	Kinmen County	10.1	64
	Jiaosi Kilin Hotel	Yilan County	44.1	168
	Taiwan Soluxe C.Y. Hotel	Chiayi County	37.8	223
	E-Da Royal Skylark Hotel	Kaohsiung City	343.6	806
	Caesar Park Hotel Banqiao	New Taipei City	141.2	400
	SenChihFeng Chihpen Resort	Taitung County	22.3	135
	Hotel River Kinmen	Kinmen County	12.3	120
	Cosmos Spring Resort Ruisui	Hualien County	46.9	198
	Yeashin International Hotel	New Taipei City	28.4	165
Subtotal	17		937.0	3,510
Total			1,684.6	4,548

Source: Taiwan Tourism Bureau

Major 4- & 5-star Hotels, Resorts, and Spas in Taiwan					
Hotel Name	No. of Roo	F & B Revenue (US$)	Locati on	Purcha sing Agent	Website

	ms				
Fullon Hotel Danshuei Fishermen's Wharf	198	$6,743,018	Taipei	Direct Importers Distributors	fishermen-wharf.fullon-hotels.com.tw
The Great Roots Resort Hotel	95	$4,940,993	Taipei	Importers Distributors	www.dabangan.com.tw
The Grand Hotel	247	$17,126,992	Taipei	Importers Distributors	www.grand-hotel.org
The Ambassador Hotel	422	$34,169,474	Taipei	Direct Importers Distributors	www.ambassadorhotel.com.tw
Imperial Hotel Taipei	326	$4,845,783	Taipei	Importers Distributors	www.imperialhotel.com.tw
Gloria Prince Hotel	216	$4,223,620	Taipei	Importers Distributors	www.gloriahotel.com
Emperor Hotel	98	$384,124	Taipei	Importers Distributors	www.emperorhotel.com.tw
Hotel Riverview Taipei	211	$1,213,602	Taipei	Importers Distributors	www.riverview.com.tw
Caesar Park Taipei	478	$7,300,773	Taipei	Importers Distributors	taipei.caesarpark.com.tw
Golden China Hotel	215	$4,757,009	Taipei	Importers Distributors	www.golden-china.com.tw

San Want Hotel	268	$12,134,076	Taipei	Importers Distributors	www.sanwant.com
Brother Hotel	250	$15,520,810	Taipei	Importers Distributors	www.brotherhotel.com.tw
Santos Hotel	287	$4,074,617	Taipei	Importers Distributors	www.santoshotel.com
The Landis Taipei Hotel	209	$6,583,918	Taipei	Importers Distributors	taipei.landishotelsresorts.com
United Hotel	243	$1,401,173	Taipei	Importers Distributors	www.unitedhotel.com.tw
Sheraton Grande Taipei Hotel	688	$45,011,899	Taipei	Direct Importers Distributors	www.sheraton-taipei.com
Hotel Royal Taipei	202	$9,113,680	Taipei	Importers Distributors	www.royal-taipei.com.tw
Howard Plaza Hotel	606	$20,412,295	Taipei	Importers Distributors	www.howard-hotels.com.tw
Grand Hyatt Taipei	853	$34,850,802	Taipei	Direct Importers Distributors	taipei.grand.hyatt.com
The Regent Taipei	538	$51,221,493	Taipei	Direct Importers Distributors	www.grandformosa.com.tw
The Sherwoo	343	$11,636,448	Taipei	Direct Import	www.sherwood.com.tw

d Hotel Taipei				ers Distributors	
Shangri-La's Far Eastern Plaza Hotel, Taipei	420	$21,493,653	Taipei	Direct Importers Distributors	www.shangri-la.com.tw
The Westin Taipei	288	$20,449,462	Taipei	Direct Importers Distributors	www.westin.com.tw
Hotel Landis China Yangmingshan	47	$1,004,058	Taipei	Importers Distributors	yangmingshan.landishotelsresorts.com
Miramar Garden Taipei	203	$2,595,212	Taipei	Importers Distributors	www.miramargarden.com.tw
Le Meridien Taipei Hotel	160	$25,563,986	Taipei	Direct Importers Distributors	www.lemeridien-taipei.com
W Taipei	405	$23,779,405	Taipei	Direct Importers Distributors	www.wtaipei.com/zh
Hotel National	178	$6,792,699	Taichung	Importers Distributors	www.hotel-national.com.tw
Plaza International Hotel	228	$3,216,114	Taichung	Importers Distributors	www.taichung-plaza.com
Evergreen Laurel Hotel (Taichung)	354	$9,304,153	Taichung	Direct Importers Distributors	www.evergreen-hotels.com

Howard Prince Hotel Taichung	155	$5,728,923	Taichung	Importers Distributors	http://taichung.howard-hotels.com.tw
The Splendor Hotel Taichung	222	$8,753,519	Taichung	Importers Distributors	www.splendor-taichung.com.tw
Hotel Tainan	152	$4,100,302	Tainan	Importers Distributors	www.hotel-tainan.com.tw
Tayih Landis Tainan	315	$9,988,023	Tainan	Importers Distributors	http://tainan.landishotelsresorts.com
Evergreen Plaza Hotel(Tainan)	197	$9,147,135	Tainan	Importers Distributors	www.evergreen-hotels.com
Shangri-La's Far Eastern Plaza Hotel,Tainan	334	$9,479,656	Tainan	Direct Importers Distributors	www.shangri-la.com/tc/tainan/fareasternplazashangrila/
Hotel Kingdom	297	$1,732,084	Kaohsiung	Importers Distributors	www.hotelkingdom.com.tw
Hotel Holiday Garden Kaohsiung	269	$2,553,551	Kaohsiung	Importers Distributors	www.hotelhg.com.tw
The Ambassador Hotel Kaohsiung	453	$13,206,378	Kaohsiung	Importers Distributors	www.ambassadorhotel.com.tw/KS/ambassador_kaohsiung.htm?LC=TC
Grand Hi-Lai Hotel	540	$24,069,616	Kaohsiung	Importers Distributors	www.grand-hilai.com
Howard	271	$6,948,1	Kaohs	Import	http://kaohsiung.howard-hotels.com.tw

Plaza Hotel Kaohsiung		72	iung	ers Distributors	
85 SKY TOWER HOTEL	585	$13,177,210	Kaohsiung	Importers Distributors	www.85sky-tower.com
Han-Hsien lnternational Hotel	380	$8,989,795	Kaohsiung	Importers Distributors	www.han-hsien.com.tw/hhih/
Grand Hotel Kaohsiung	107	$4,198,334	Kaohsiung	Importers Distributors	www.grand-hotel.org/kaohsiung/zh-TW/
The Lees Hotel	198	$6,909,867	Kaohsiung	Importers Distributors	www.theleeshotel.com
E-DA Royal Hotel	656	$10,902,815	Kaohsiung	Direct Importers Distributors	www.edaroyal.com.tw
Hotel Royal Chiao-His	193	$8,302,433	Yilan	Importers Distributors	www.hrjhotel.com.tw
Silks Place Yilan	193	$11,388,737	Yilan	Importers Distributors	www.silksplace-yilan.com
Evergreen Resort Hotel(Jiaosi)	231	$7,458,796	Yilan	Importers Distributors	www.evergreen-hotels.com
Pleasant Hotels International	388	$2,861,489	Taoyuan	Importers Distributors	www.pleasanthotels.com.tw
Monarch-Skyline Hotel	250	$2,879,309	Taoyuan	Importers Distributors	www.skyline-hotels.com.tw

South Gardens Resort	111	$4,343,204	Taoyuan	Importers Distributors	www.southgarden.com.tw
Novotel Taipei Taoyuan International Airport	360	$5,401,623	Taoyuan	Importers Distributors	www.novoteltaipeiairport.com/tw/
Sheraton Hsinchu Hotel	386	$15,230,564	Hsinchu	Direct Importers Distributors	www.sheraton-hsinchu.com
The Lalu Sun Moon Lake	96	$4,136,183	Nantou	Importers Distributors	www.thelalu.com.tw
Fleur De Chine Hotel	211	$8,171,417	Nantou	Importers Distributors	www.fleurdechinehotel.com
Wen Wan Hotel & Resorts	91	$2,748,931	Nantou	Importers Distributors	www.thewenwan.com
Caesar Park Hotel Kenting	281	$5,505,754	Pingtung	Importers Distributors	www.caesarpark.com.tw
Howard Beach Resort Kenting	405	$4,627,734	Pingtung	Importers Distributors	http://kenting.howard-hotels.com.tw
Dong Fang Du Jia Jiudian Hotel	112	$393,162	Pingtung	Importers Distributors	http://orient-resort.com
Hotel Royal Chihpen Spa	182	$3,381,025	Taitung	Importers Distributors	www.hotel-royal-chihpen.com.tw
Formosa	276	$3,847,9	Taitun	Import	www.naruwan-hotel.com.tw

n Naruwan Hotel & Resort Taitung		34	g	ers Distributors	
Astar Hotel	167	$457,636	Hualien	Importers Distributors	www.astar-hotel.com.tw
Marshal Hotel	270	$2,290,684	Hualien	Importers Distributors	www.marshal-hotel.com.tw
Hualien Chateau de Chine Hotel	197	$4,450,083	Hualien	Importers Distributors	http://hualien.chateaudechine.com
Parkview Hotel	343	$5,463,153	Hualien	Importers Distributors	http://www.parkview-hotel.com/menu.asp
Silks Place Hotel, Taroko	160	$2,734,372	Hualien	Importers Distributors	www.silksplace-taroko.com.tw
Farglory Hotel, Hualien	381	$6,138,417	Hualien	Importers Distributors	www.farglory-hotel.com.tw
Hotel Royal Hsinchu	208	$5,019,297	Hsinchu	Importers Distributors	www.hotelroyal.com.tw/hsinchu/
The Ambassador Hotel Hsinchu	257	$11,201,781	Hsinchu	Direct Importers Distributors	www.ambassadorhotel.com.tw
Nice Prince Hotel	245	$6,311,478	Chiayi	Importers Distributors	www.niceprincehotel.com.tw
Total	20,401	$686,495,913			

Source: ATO Survey; Taiwan Tourism Bureau, Ministry of Transportation & Communications

2. Restaurants

The restaurant sub-sector dominates the local food service market in Taiwan with 84.5 percent of the market in 2014. Based on the Taiwan Ministry of Economic Affairs data, the total revenue for the restaurant sub-sector was estimated at US$13.02 billion in 2014, while beverage stores generated US$1.45 billion revenue for an 11.1 percent market share. Meanwhile, other operations in this sector gained US$0.56 billion with a 4.3 percent share.

		Total Revenue (US$ Million)	**% Change2014/2013**
2014	Total	13,019	3.1
	Restaurants	11,008	3.2
	Beverage Stores	1,447	2.0
	Others	564	2.8

Source: Ministry of Economic Affairs

- **Family Style/Casual Dining Restaurants**

The majority of restaurants in Taiwan are casual dining places. As most of the restaurants in this category are small businesses, they purchase materials mainly from wholesalers and wet market. Only larger chains/franchises tend to buy products from importers or import directly.

- **Breakfast shops**

There are over 12,000 breakfast shops in Taiwan. Most of them provide western-style foods such as hamburgers, sandwiches, milk tea and coffee. These breakfast chains and franchises are more like miniatures of western fast food restaurants, but they sell foods at lower prices and with more variety. Since they provide faster service and cheaper foods, they are the first choice for the majority of consumers buying breakfast on a limited budget. In recent years, breakfast shops have faced stronger competition from Taiwan's 24-hour convenience stores (over 10,000 island-wide), which feature healthier, fresher food selections and freshly brewed coffee In response, local breakfast stores are being forced to change their model since revenue has been declining.

- **Western-style Fast Food**

McDonald's, which opened its first outlet in 1984, remains the largest fast food chain in Taiwan with 414 stores (as of April 2015) island-wide. Competition among fast-food restaurants is becoming more intense since the Japanese-based MOS Burger started a more aggressive expansion in foreign markets. MOS became the second largest western-style fast food chain in Taiwan with over 250 outlets, as of May 2015, in Taiwan. Facing growing competition, McDonald’s announced in June 2015 that the company was aiming to franchise all its Taiwan stores. To-date, 17 percent of McDonald’s stores in

Taiwan is franchised. Localization and competition from convenience stores are two of the most important challenges for western - style fast food restaurant chains. While franchisees are more familiar with local market trends and consumer preferences, franchising all the stores may help McDonald's in expanding its sales in Taiwan and gaining more profit, according to Taiwan food service observers.

New products, such as coffee latte, bagels and rice burgers, were introduced into the Taiwan market, leading to even greater diversity in consumer choices and expectations. In addition, promotions offered by fast food establishments, including price-off, giveaways, and volume discounts, are increasingly common.

- **Chinese-style Fast Food**

As the entry barrier for Chinese-style fast food chains and franchisers is low, they have sprung up all over Taiwan in the past decade. They have gained popularity with all ages of consumers, specializing in dumplings, meat ball and sour-spicy soups, beef noodles and Chinese stews. Greater competition among these fast food chains, combined with new competition from convenience store that are expanding into prepared meal service, have led to increased pressure on margins in this segment.

Low labor costs and the fact that many chains have the ability to provide standardized products, have made the outlet numbers of these chains grow faster than western fast food restaurants in recent years, which was contrary to industry experts' expectations. Though the expansion of Chinese-style fast food restaurants has slowed, they are still the major competitors for Western-style fast food chains.

- **Department Store Food Courts & Restaurants**

Typically, major department stores in Taiwan have several sit-down restaurants as well as a full or at least part of a floor devoted to a food court. Revenue from restaurants and food courts represent around 30 percent of total department store revenue. Shin Kong Mitsukoshi, Far Eastern Department Store, and Sogo Department Store (also managed by Far Eastern) are the major players. These food courts are favored by small restaurant operations, which intend to get fast and efficient exposure.

- **Coffee Shop Chains**

Coffee consumption in Taiwan has seen rapid growth in recent years. The market size is currently estimated at US$1.18 billion. Coffee import volume, including raw and roasted coffee, doubled in the past decade, increasing from 10,919 metric tons (MT) in 2004 to 23,774 MT in 2014.

Current annual per capita coffee consumption in Taiwan is 110-125 cups, according to industry estimates. The market is still relatively underdeveloped compared to consumption in western countries (300-400 cups) or even in the neighboring countries such as Japan and Korea (200-300 cups), so there is room for further expansion.

Competition in the Taiwan coffee market segment intensified after chain convenience stores entered the game by offering freshly-brewed coffee. Younger generations, especially white-collar workers, are the major consumers of freshly brewed coffee. Drinking coffee in a coffee shop symbolizes fashion, taste, and a stylish lifestyle, and it has become a social stimulant for conversation, logging onto a social web, or business meetings. Hence, more and more younger people are seen drinking coffee in a variety of circumstances.

Most coffee shops also provide sandwiches, salads, cakes and pastries prepared by catering companies or other food processors. Some domestic and Japanese style coffee shops also offer freshly made sandwiches and hot meals, which are shipped frozen from their food processors for reheating at the outlets. Many coffee chains import coffee beans directly but purchase other food materials from importers, wholesalers, and distributors. The significant growth of the coffee shop segment in recent years in Taiwan has created a niche market for imported candy/chocolate and cookie products. Many coffee shops, such as Starbucks, Dante, 85°C Coffee, Ikari Coffee and Barista, not only sell coffee and light meals, but also sell candy/chocolate/cookie products with small and attractive packaging.

Latte (espresso with steamed milk) and Americano (adding water to espresso) are the most popular orders in coffee shops. Iced coffee and other seasonal offers are also moneymakers for many stores. The growing demand for cafe latte has also stimulated demand for milk (fresh or powdered).

Opening its first store in 2009, Cama Café, a coffee chain featuring freshly roasted beans, created a new trend in Taiwan’s coffee industry. With an average store size of 260 square feet, only one-fifth of Starbucks, the coffee chain successfully overtook almost all coffee chains in terms of profit per unit. As of March 2015, Cama Café has 77 shops throughout Taiwan.

Taiwan Import Statistics								
Commodity: 0901, Coffee, Whether Or Not Roasted Or Decaffeinated; Coffee Husks And Skins; Coffee Substitutes Containing Coffee								
Calendar Year: 2012 - 2014								
Partner Country	**Unit**	**Quantity**			**% Share**			**% Change**
		2,012	**2,013**	**2,014**	**2,012**	**2,013**	**2,014**	**2014/2013**
World	T	18,448	21,800	23,774	100.00	100.00	100.00	9.05
Indonesia	T	4,339	5,225	5,745	23.52	23.97	24.16	9.94
Brazil	T	3,783	4,614	4,489	20.51	21.16	18.88	- 2.70
Guatemala	T	1,606	1,741	2,045	8.71	7.99	8.60	17.42
Colombia	T	942	1,218	1,745	5.11	5.59	7.34	43.19
United States	T	1,292	1,563	1,425	7.00	7.17	5.99	- 8.88
Vietnam	T	2,094	1,583	1,335	11.35	7.26	5.62	- 15.65
Nicaragua	T	132	560	1,319	0.72	2.57	5.55	135.61
Ethiopia	T	594	810	1,162	3.22	3.72	4.89	43.48
Malaysia	T	334	396	702	1.81	1.82	2.95	77.31
El Salvador	T	50	476	559	0.27	2.18	2.35	17.29
Honduras	T	585	667	534	3.17	3.06	2.24	- 20.00

Source: Global Trade Atlas

- **Soft Drink Bars**

Soft drink bars are seen on every corner of Taiwan's streets. This type of soft drink shop developed rapidly after "bubble tea" gained popularity in the 1980s. "Pearl Milk Tea", which contains small chewy balls made of tapioca starch, is the signature drink and the most popular order in many of the soft drink bars.

In addition to Pearl Milk Tea, there are many other variants of soft drinks. Most of them are tea-or fruit-based ice-blended and smoothie versions. Fresh fruits, syrups, pulp, black and green tea, instant coffee, concentrated fruit juice, creamer, and milk, which are purchased mostly from importers and distributors, are the basic materials used in these shops.

Most of the bars only provide to-go service, and the shops may be as small as 100 square feet. Soft drink stands are often seen in the night markets, allies near office buildings and near schools.

Major Restaurant Company Profiles

- **Restaurants**

Company Name	Sales ($Mil) / 2014	Outlet Name, type, Number of Outlet (Taiwan only)	Location	Purchasing Agents
Noble Family Co., Ltd	NA	Noble Family Steakhouse, (steakhouse) (86)	National	Direct Importers
Bullfight Group Taiwan Inc.	NA	Bullfight (steakhouse, family style) (11)	National	Direct Importers
WowPrime Corp.	533.3 (public data)	Wang Steak (steakhouse) (15)	National	Direct Importers
		Tasty (family style) (45)	National	Direct Importers
		Tokiya (family style) (33)	National	Direct Importers
		Yuanshao (Japanese BBQ) (24)	National	Direct Importers
		Giguo (Hot Pot) (32)	National	Direct Importers
		Ikki (Japanese family style) (16)	National	Direct Importers
		Chamonix (Teppenyaki) (15)	National	Direct Importers
		Pintian Farm (family style) (30)	National	Direct Importers
		12 Sabu (hot pot) (50)	National	Direct Importers
		Su Food (organic/healthy food) (15)	National	Direct Importers

Skylark Co.	NA	Skylark (family style) (9)	North/Central	Importers Distributors
		Grazie (Italian) (24)		Importers Distributors
Shin Yeh Co., Ltd.	NA	Shin Yeh (Taiwanese / family style) (4)	Taipei	Importers Distributors
Ding Tai Fung	NA	Ding Tai Feng (Chinese) (9)	North/Central	Importers Distributors
T.G.I. Friday's	NA	T.G.I. Friday's (American style) (13)	National	Director Importers Distributors
Hasmore Ltd. Co.	NA	Swensen's (American style) (6)	National	Director Importers Distributors
		Ruth's Chris (steakhouse) (4)	National	
		Nagi (Japanese noodles) (5)	National	
		Chili's (American style) (6)	National	
		Nihonryori Ryugin (Japanese) (1)	Taipei	
		Pâtisserie Sadaharu Aoki Paris (bakery/cafe) (2)	Taipei	
		Raw (Fusion) (1)	Taipei	
Royal Host	NA	Royal Host (western/family style) (14)	National	Importers Distributors
McDonald's Restaurants (Taiwan) Co., Ltd.	NA	McDonald's (fast food) (414)	National	Direct Importers Distributors
Great Wall Enterprise Co., Ltd.	NA	Burger King (fast food) (25)	National	Direct Importers Distributors
		Saboten Japanese Restaurant (Japanese family style) (27)	National	Direct Importers Distributors
Jardin Food Services (Taiwan) Co., Ltd.	NA	Kentucky Fried Chicken (fast food) (128)	National	Direct Importers Distributors
	NA	Pizza Hut (Pizza) (189)	National	Direct Importers Distributors
An-Shin Food Service Co., Ltd.	134.07 (public data)	MOS Burger (fast food) (236)	National	Direct Importers Distributors
Eight Way Food Co., Ltd.	NA	8 Way Dumplings (Chinese/fast food) (710)	National	Importers Distributors
Long Mao Co., Ltd.	NA	Oversea Dragon (Chinese /fast food) (186)	National	Importers Distributors
Mercuries &	NA	Mercuries Food Chain	National	Direct

Associates, Ltd.		(Chinese/fast food) (153)		Importers Distributors
		Napoli Pizza (fast food/pizza) (91)	National	Direct Importers Distributors
Pizzavest Co., Ltd. (Regent Group)	NA	Dominos Pizza (pizza) (130)	National	Direct Importers Distributors
Sushi Express CO., Ltd.	NA	Sushi Express (Japanese/Sushi) (145)	National	Importers Distributors
		Sushi Take-out (Japanese /Sushi) (19)	North	Importers Distributors
		Dingshi 8 (family style) (51)	North	Importers Distributors
Yoshinoya	NA	Yoshinoya (Japanese beef rice/fast food) (53)	National	Direct Importers Distributors
Wang Zhang Fa Industry Ltd.	NA	Gaibom (Chinese) (96)	National	Direct Importers Distributors
Ji-Shang Industry Co., Ltd.	NA	Wu Tao (Chinese) (218)	National	Importers Distributors
HuMax Taiwan Co, Ltd.	NA	Mo Mo Paradise (Japanese)(15)	National	Direct Importers Distributors
		Bellini Pasta Pasta (6)	North	Importers Distributors
		Bellini Caffe (Italian) (2)	North	Importers Distributors
Hwa Da Industry Co., Ltd.	NA	YaYan Yakiniku Restaurant (Japanese) (32)	National	Direct Importers Distributors
Top of Form Tonkatsu Co., Ltd.	NA	Tonkatsu (Japanese) (39)	National	Importers Distributors
Cashcity Foodservice Co., Ltd.	NA	Cashcity Shabu Shabu (Japanese) (143)	National	Direct Importers Distributors
Shuh Sen Co., Ltd.	NA	My Home Steak (Steakhouse) (55)	National	Direct Importers Distributors
TTFB Company Limited	72.7 (public data)	Thai Town Cuisine (Thai Food) (47)	National	Direct Importers Distributors
		Very Thai (Thai Food) (6)	North/South	Direct Importers

				Distributors
		1010 Shang (Chinese) (12)	National	Direct Importers Distributors
		Very Thai Noodles (14)	National	Direct Importers Distributors
Subway Taiwan Development	NA	Subway (Western) (135)	National	Direct Importers Distributors

Source: ATO Survey

- **Breakfast shop chains and franchises**

Company Name	Sales ($Mil) / 2014	Outlet Name, type, Number of Outlet (Taiwan only)	Location	Purchasing Agents
Hong Ya International Enterprise Co. Ltd.	NA	Hong Ya Burger (810)	National	Direct Importers Distributors
Sun Spark Group	NA	Laya Burger (580)	National	Direct Importers Distributors
Super-Mill Group Co. Ltd	NA	My Warm Day (1068)	National	Direct Importers Distributors
Ju-Lin Food Enterprise Co., Ltd.	NA	Ju-Lin Mei-Er-Mei (1000)	National	Direct Importers Distributors
Good Morning Beauty Castle Enterprise Co., Ltd.	NA	Good Morning Beauty Castle (1,004)	National	Direct Importers Distributors
Chiao Pei International Co., Ltd.	NA	Eastern Beauty (523)	National	Direct Importers Distributors
Mei & Mei Foodservice Chain Group	NA	Mei & Mei (2,500)	National	Direct Importers Distributors

Source: ATO Survey

3. Coffee, Beverage & Dessert (non-bakery) Shops

Company Name	Sales ($Mil) /	Outlet Name, type, Number of Outlet	Location	Purchasing Agents

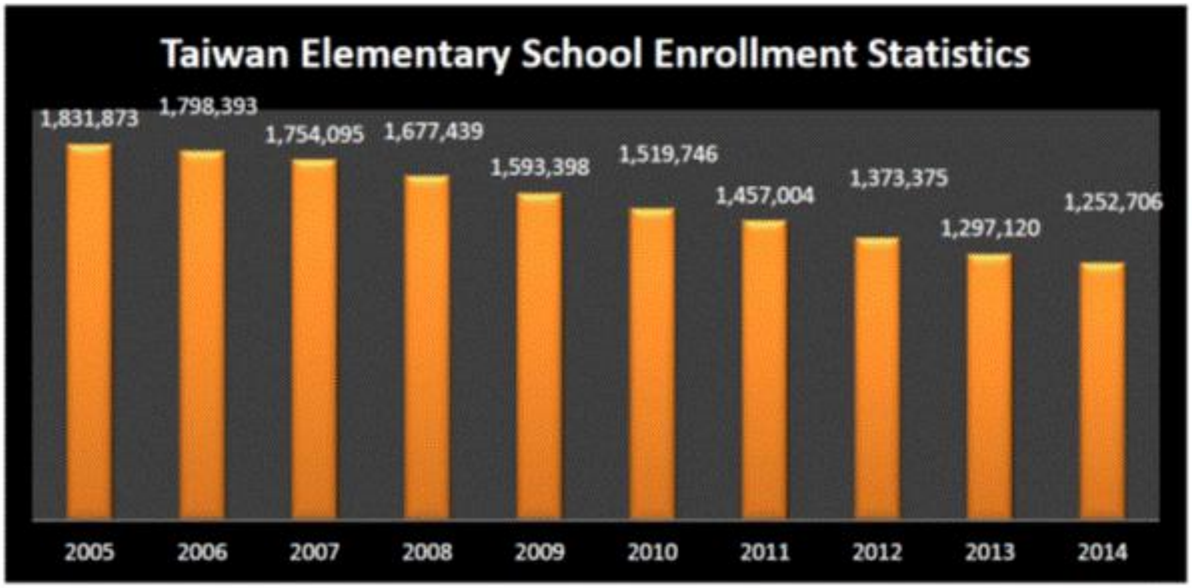
	2014	(Taiwan only)		
Gourmet Master Co., Ltd.	565.0 (public data)	85°C Bakery Café (coffee) (330)	National	Direct Importers Distributors
Uni-President Starbucks Coffee Company	NA	Starbucks (coffee) (339)	National	Direct Importers Distributors
Dante Coffee and Foods Co., Ltd.	NA	Dante (coffee) (122)	National	Direct Importers Distributors
ECoffee Co., Ltd.	NA	ecoffee (coffee) (110)	National	Direct Importers Distributors
Mr. Brown Coffee Shop	NA	Mr. Brown Coffee (coffee) (58)	North	Direct Importers Distributors
Ding-hao Acme Co., Ltd.	NA	IS (coffee) (10)	North/Central	Direct Importers Distributors
Kohikan Corporate	NA	Kohikan (coffee) (13)	North/Central	Direct Importers Distributors
Barista	NA	Barista Coffee (coffee) (29)	National	Direct Importers Distributors
Ikari Coffee Co., Ltd.	NA	Ikari (coffee) (64)	North/Central/East	Direct Importers Distributors
Cama Co., Ltd.	NA	Cama (coffee) (77)	National	Direct Importers Distributors
Rose Republic International Co., Ltd.	NA	Rose House (tea and coffee) (26)	National	Direct Importers Distributors
Louisa Coffee Co., Ltd.	NA	Louisa Coffee	National	Direct Importers Distributors
TenRen Group (Ten Ren Co., Ltd.)	NA	Cha For Tea (Tea) (76--Tea Restaurant:11; Tea Bar: 65)	National	Direct Importers Distributors
Tea Professional Intl Chian Group	NA	Tea Professional (Tea Bar) (160)	National	Direct Importers Distributors
Chuan Yi Tung Business Co. Ltd.	NA	Ching Shin Fu Chuan (Tea Bar) (1,078)	National	Direct Importers

				Distributors
OCOCO International Co.	NA	CoCo (Tea Bar) (320)	North/Central/South	Direct Importers Distributors
COMEBUY Intermational Co.,Ltd	NA	COMEBUY (Tea Bar) (110)	National	Direct Importers Distributors
Ah-2 International Co., Ltd.	NA	Ah-2 Ice Tea (Tea Bar) (316)	National	Direct Importers Distributors
JeanDingTea Co., LTd.	NA	Tea-Top (Tea Bar) (104)	National	Direct Importers Distributors
Presotea Co., Ltd.	NA	Presotea (Tea Bar) (246)	National	Direct Importers Distributors
Shen-Geng Tea Co., Ltd.	NA	50 Lan (Tea Bar) (509)	National	Direct Importers Distributors

Source: ATO Survey; company websites; Taiwan Chain and Franchise Annual Report

3. Institutional

With air traffic between Taiwan and China increasing significantly, the air catering sector's future is promising. School and military catering is stable but might face more challenges in the future due to decreasing student numbers resulting from low birth rates and Taiwan's policy of reducing its military force. On the other hand, healthcare food service is powering the growth in the hospital restaurant and cafeteria sector by offering more varieties and individualized, nutritious and healthier meals.



Source: Department of Education, ROC

- **Air Catering**

Currently, Evergreen Sky Catering Corporation, China Pacific Catering Service, and the TransAsia Airway Corporation dominate the local air catering market. Given strong competition within this sector, these companies are aggressively expanding their catering business to include local convenience stores, restaurants, coffee shops, schools, and hospitals. These airline flight kitchens purchase food ingredients from local importers, manufacturers and wholesalers, but also import directly. The industry is widely expected to record continued growth over the next few years.

- **Schools**

As of January 2015, there are 6,468 pre-school/kindergarten, 2,644 elementary and 738 junior high schools, both public and private, in Taiwan. According to the Ministry of Education, all kindergartens, elementary and junior high schools in Taiwan operate lunch meal programs. Over 90 percent of students eat meals provided by school kitchens or school lunch program contractors, which means that over 2.2 million students in Taiwan eat at school. The budget for a meal is about NT$35-45 (approximately US$1.1-14) per child. In terms of animal proteins, due mainly to cost concerns, beef is not used as much as pork and chicken. Leafy vegetables and fresh fruits are preferred. Given the small budget allocated for school meals, the use of U.S. products in this sector is limited, including frozen chicken and pork, fresh fruits and root vegetables.

Food and food ingredients suppliers of the public school lunch programs are requested to provide locally produced food products with Chinese Agricultural Standards (CAS) certifications to support local productions.

In December 2015, the Taiwan Legislature passed amendments to the School Health Act that ban the use of genetically modified food (GMO) ingredients or processed food with such ingredients in school meals. The Ministry of Education said that when the new requirements take effect, which is expected to be February 2016 at the earliest, the cost of school meals could increase by NT$5 (US$0.15) each.

- **Hospitals**

As of 2014, there were 497 hospitals (including branches) registered in Taiwan with over 100,200 beds. Major hospitals are located in big cities (Taipei, Kaohsiung, and Taichung) on the west coast. Most of the major hospitals have restaurants for visitors and separate restaurants or cafeterias for employees and patients. Restaurants for visitors are normally operated by contractors, while meals for employees and patients are typically planned by dietitians and prepared by hospital kitchens. Some small-scale hospitals outsource their food service business to catering companies. Since most hospitals run on a tight budget for food, U.S.-sourced food products are rarely specified. However, some niche opportunities exist, such as pureed foods for dietary and the needs of the elderly. Frozen items, like sheet cakes for labor saving dessert items, and fresh low-cost fruits for patients are some of the other opportunities that exist

- **Retirement Home**

Development of retirement homes, sometimes called senior centers or nursing homes, are growing in Taiwan due to rapid growth of an aging population. As of October 2015, over 2.9 million people in Taiwan are 65 years old or older. Taiwan is set to surpass Japan as Asia’s fastest aging nation in a decade, according to Taiwan experts. With relatively few food and drink products, opportunities exist for this segment including food with finer texture, enriched and enhanced flavors, healthy diets, etc.

- **Military**

Taiwan has had mandatory military service (usually lasts 4-12 months) for all males since 1949. The Ministry of Defense stated the total number of soldiers in Taiwan is 215,500 as of 2013. The number of soldiers will continue to decline as Taiwan is recruiting for an all-volunteer professional force.

Each military base, or unit, manages most of its food purchases on a daily basis and buys fresh products from wholesalers or wet markets. They are usually required to support locally produced products except when local products are in short supply. Larger military bases have outsourced, since 2013, their food service business to catering companies and maintain very little personnel to prepare food for special occasions.

SECTION III. COMPETITION

In 2014, Taiwan imported US$13.84 billion of food and agricultural products from many different sources, of which US$3.74 billion (27.06 percent) was imported from the United States. The United States was the number one agricultural supplier to Taiwan, followed by Brazil, China, Australia and New Zealand. Brazil is the United States’ largest competitor in terms of soybean and corn. China agricultural products exports to Taiwan are restricted due to market protections but grow steadily. Australia is the largest supplier of beef in terms of volume up to date while the U.S. supplies more beef dollar-wise. Thailand was Taiwan's largest supplier for starches and sugar/sucrose products. New Zealand ranked as the top supplier of dairy products, mutton and kiwi.

While maintaining its position as a substantial supplier of bulk commodities such as soybeans (56.3 percent) and wheat (78 percent), the United States supplied 43 percent of beef, 83 percent of poultry products, 94 percent of almonds and 93 percent of walnuts in 2014.

The United States is also the top supplier of imported vegetable and fresh fruits: apples (31 percent or US$75.7 million), cherries (52 percent or US$48 million), peaches (83 percent or US$32 million) and fresh grapes (48 percent or US$28 million) and onions (60 percent or US$10 million).

Taiwan Agricultural Products Import Statistics

Product Category	Total Import Value 2014 (US $Mil)	Major Supply Sources and Market Share	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
Total Food and Agricultural Imports	13,836.9	**1. USA - 27.06%** 2. Brazil - 7.35% 3. China - 6.5% 4. Australia - 6.14% 5. N. Zealand -5.48% 6. Thailand - 5.28% 7. Malaysia - 5.26% 8. Japan - 3.95% 9. Indonesia - 3.67% 10. Vietnam – 2.60%	South American countries have become major suppliers of bulk commodities, wine, dairy products, and fresh fruits. China is the major suppliers of seafood and plywood.	Taiwan's food self-sufficiency rate is low at 34.1% (2014, COA data) and relies heavily on imports to meet domestic demand.
Total Fish and Seafood Products Imports	932.2	1. China – 14.96% 2. Norway – 13.00% 3. Vietnam – 9.17% 4. Indonesia - 6.51% **10. USA – 3.29%**	Chinese companies mainly supply abalone, shrimp, and scallops while Norway is the major supplier of salmon and mackerel. U.S. is a major supplier of fresh and chilled/frozen lobsters.	Taiwan produces more seafood products than it needs and only imports those not available in the region. Many seafood companies in China are invested by Taiwan companies.
Bulk Commodity				
Corn (Maize)	1,032.8	**1. USA -**	South Africa is an	Taiwan relies heavily on

		46.47% 2. Brazil - 33.79% 3. S. Africa - 16.06%	emerging competitor.	corn imports to meet feed needs.
Soybean	1,348.4	**1. USA - 56.30%** 2. Brazil – 39.62	Both USA and Brazil are the leading soybean suppliers, but Brazil has been more aggressive in recent years.	Taiwan relies heavily on soybean imports to meet both feed and food needs.
Wheat	456.5	**1. USA – 77.97%** 2. Australia - 17.32%	USA is the leading supplier of wheat, followed by Australia.	Taiwan has no significant wheat production.
Meat & Poultry				
Beef and beef offal	690.4	**1. USA – 42.58%** 2. Australia – 32.77% 3. N. Zealand – 17.54%	Australia dominates market for cheaper beef cuts while the USA is traditionally the largest chilled beef supplier.	Taiwan's beef production only accounts for approximately 5% of total beef consumed on the island.
Pork and pork variety meat	177.7	1. Canada - 27.90% 2. Denmark- 22.68% 3. Natherlands - 19.12% **4. USA - 18.17%** 5. Hungary - 6.72%	Imports have occurred only in response to occasional short supplies and high local pork prices. U.S. exports slumped due to the feed additive - ractopamine disputes.	Local pork dominates the market.
Poultry	185.6	**1. USA - 83.14%** 2. Canada - 16.57%	Taiwan consumer's preference for dark meat provides opportunities for western countries. USA products are generally price competitive.	Local chicken dominates the market.
Fish & Seafood				
Fish Meat, Frozen	57.6	1. India – 43.38% 2. Vietnam – 21.08% 3. Indonesia – 16.77% **6. USA –**	Taiwan imports frozen fish fillets (esp. cod and pollack) and surimi for further processing.	Taiwan produces more seafood products than it needs and only imports those not available in the region.

		2.25%		
Rock Lobster and Other Sea Crawfish, Frozen	22.3	1. Cuba – 39.54% **2. USA – 17.58%**	Cuba is the largest suppliers of frozen lobsters, followed by the U.S. and Australia.	Lobsters are not often seen along Taiwan's coastlines.
Lobster, other than Frozen	11.6	**1. USA – 67.46%** 2. Canada – 32.42%	USA and Canada are the major suppliers of live, fresh and chilled lobsters.	Lobsters are not often seen along Taiwan's coastlines.
Dairy Products				
Cheese and Curd	135.8	**1. USA – 29.48%** 2. N. Zealand - 27.70% 3. Australia – 10.29% 4. Argentina - 10.29%	The USA is becoming more competitive in cheese supply to Taiwan and replaced New Zealand to become the largest supplier starting 2012.	Local production is limited.
Fresh Fruits				
Apples, Fresh	244.7	**1. USA - 30.94%** 2. Chile - 26.69% 3. Japan - 23.26% 4. N Zealand - 15.32%	USA leads with several fresh fruits that have limited local production, including apples. Chilean and New Zealand apples gain seasonal advantage.	Taiwan is a significant producer of fresh tropical fruits, and local fruit production is very high quality. Taiwan only imports fruits typically not produced locally.
Grapes, Fresh	58.00	**1. USA – 47.89%** 2. Chile – 23.91% 3. Peru – 12.60%	USA is the leading table grapes supplier.	Local products are different varieties.
Cherries, Fresh	92.3	**1. USA - 52.23%** 2. Chile - 25.17% 3. N. Zealand - 9.65% 4. Australia – 7.35%	USA provides high quality products. Southern hemisphere countries gain seasonal advantages.	There is no local production.
Peaches, Fresh	36.9	**1. USA - 83.09%** 2. Japan – 8.90% 3. Chile -	USA products are in good quality and price competitive.	Local products meet more than half of total demand.

		7.73%		
Table Grape, Fresh	38.0	**1. USA - 59.13%** 2. Chile - 18.73% 3. South Africa - 7.82%	USA supply good quality fresh table grape. Chile and South Africa supply price competitive products.	Local farmers produce different grape varieties - typically sweeter.
Plum, Fresh	7.02	**1. USA - 91.63%** 2. Chile - 8.37%	USA is the leading supplier of plums.	Local products are different varieties.
Oranges, Fresh	9.8	**1. USA – 85.99%** 2. South Africa – 7.50% 3. Australia - 6.04%	USA is the dominant supplier of imported fresh oranges.	Local products are different varieties.
Fresh Vegetable				
Broccoli and cauliflower, fresh	12.5	**1. USA - 98.03%** 2. Vietnam - 1.83%	USA is the major supplier of imported broccoli and cauliflowers.	Local products dominate the market.
Onions, fresh or chilled	17.0	**1. USA - 60.04%** 2. South Korea - 29.72% 3. New Zealand – 6.87%	USA is the major supplier of imported onions.	Local production fulfills around 60% of local demand.
Lettuce and Head Lettuce, fresh or chilled	11.4	**1. USA - 99.84%**	USA supplies good quality products with competitive prices.	Local products are different varieties and generally of lower quality.
Potatoes, fresh	5.9	**1. USA - 94.58%** 2. Australia - 5.42%	USA is the major supplier of imported potato products, providing good quality products with competitive pricing.	Local products dominate the market and are different varieties.
Alcohol and Other Beverages				
Wines, wine, and sparkling	146.7	1. France - 53.93%	France dominates the market, but new world	Local companies are not yet able to produce

wine		**2. USA - 8.85%** 3. Italy - 8.71% 4. Chile - 6.96% 5. Spain - 6.44% 6. Australia - 6.40%	countries are gaining traction due to competitive pricing. U.S. is the sixth largest supplier by volume in 2014.	quality wine.
Beer	183.9	1. Netherlands - 66.11% 2. China - 14.04% 3. Japan - 4.70% **4. USA - 4.07%**	The Netherlands and China are aggressive suppliers with many promotions in restaurants and bars.	Local beer brands are most popular.
Other products				
Coffee, roasted, not decaf	33.24	**1. USA - 46.13%** 2. Malaysia - 17.56% 3. Italy - 13.37%	USA supplies approximately half of roasted coffee while Indonesia, Brazil and other tropical countries supply most of the non-roasted coffee beans.	There is little local production available.
Almonds, shelled	44.85	**1. USA - 94.11%** 2. China - 4.94%	USA is the dominant supplier of tree nuts.	There is no local production available.
Walnuts, shelled	27.86	**1. USA - 92.96%** 2. India – 5.04%	USA is the dominant supplier of tree nuts.	There is no local production on a commercial level.

Source: ATO survey; Council of Agriculture; Global Trade Atlas

U.S. Exports of Agricultural & Related Products to "Taiwan"
CY 2008 - 2014
(in millions of dollars+)

Export Market: "Taiwan"

Product	Calendar Years (Jan-Dec) 2008	2009	2010	2011	2012	2013	2014	% Change 2013-14
Bulk Total	2,263.0*	1,857.0	1,792.4	2,127.4	1,666.9	1,321.4	1,687.1	27.7
Wheat	327.0	240.7	230.5	398.0*	357.0	364.5	348.5	-4.4
Corn	806.0	723.8	612.6	794.9	308.0	180.1	394.0	118.8
Coarse Grains (ex. corn)	8.0	1.3	2.1	4.5	1.9	3.1	20.1	552.6
Rice	15.0	26.4	61.4*	16.5	46.6	42.5	35.9	-15.3
Soybeans	952.0*	718.9	654.8	702.7	764.1	575.8	725.1	25.9
Oilseeds (ex. soybean)	1.0	0.9	0.8	1.0	1.2	0.9	1.0	3.7
Cotton	131.0	102.7	189.6	175.2	156.1	126.8	127.0	0.1
Pulses	4.0	24.7*	20.7	24.3	21.0	15.2	17.5	15.1
Tobacco	18.0	17.0	18.6	8.7	10.1	10.2	16.9	66.4
Other Bulk Commodities	1.0	0.6	1.3	1.6	1.0	2.2	1.1	-51.7
Intermediate Total	360.0	292.9	380.6	414.7	390.9	431.9	421.2	-2.5
Soybean Meal	6.0	0.8	2.4	10.1	7.0	26.2	11.8	-55.1
Soybean Oil	21.0*	12.3	0.2	0.3	0.2	0.1	0.2	82.8
Vegetable Oils (ex. soybean)	6.0	10.3	14.0	7.4	6.1	7.8	9.4	20.1
Animal Fats	1.0	1.1	1.8	2.2	0.4	0.4	0.3	-18.5
Live Animals	2.0	2.6	3.4	2.2	4.0	1.8	1.9	2.7
Hides & Skins	134.0	89.5	170.6	171.1	132.3	138.3	147.6	6.7
Hay	24.0	24.8	28.4	33.6	39.7	41.5*	38.7	-6.7
Distillers Grains	40.0	31.8	25.2	60.1	62.5	71.6*	59.1	-17.4
Feeds & Fodders NESOI	58.0	56.8	66.8*	63.5	54.2	61.2	55.4	-9.5
Planting Seeds	4.0	4.6	5.2	4.6	8.2	13.7	14.2*	3.6
Sugar, Sweeteners, Bev. Bases	6.0	3.5	5.3	5.1	7.7	7.5	7.3	-2.4
Other Intermediate Products	57.0	54.7	57.5	54.5	68.7	61.8	75.2	21.8
Consumer Oriented Total	797.0	838.1	1,017.1	1,070.4	1,152.5	1,327.8	1,384.9*	4.3
Beef & Beef Products	128.0	141.2	216.3	199.3	128.4	254.4	293.7*	15.4
Pork & Pork Products	53.0	66.6*	56.9	53.9	40.8	40.3	38.3	-5.1
Poultry Meat & Prods. (ex. eggs)	81.0	82.1	111.1	120.8	175.7*	164.7	143.1	-13.1
Meat Products NESOI	2.0	2.9	13.3*	4.4	2.2	3.2	2.4	-24.3
Eggs & Products	1.0	3.7	2.9	1.2	3.7	3.9	4.6*	17.5
Dairy Products	31.0	25.7	33.6	47.0	55.6	67.6	79.2*	17.2
Fresh Fruit	153.0	147.2	153.4	180.2	209.9	204.9	213.7*	4.3
Processed Fruit	26.0	29.6	26.2	32.9	30.3	32.7	34.1*	4.5
Fresh Vegetables	50.0	45.0	57.0	55.0	72.5*	71.5	64.4	-9.9
Processed Vegetables	44.0	43.1	53.0	57.6	63.2	65.2	65.5*	0.6
Fruit & Vegetable Juices	12.0	12.0	14.2*	12.9	11.7	12.0	10.2	-14.4
Tree Nuts	25.0	32.6	44.6	62.3	75.4	86.6	104.6*	20.7
Chocolate & Cocoa Products	17.0	19.2	18.6	20.9	22.8	23.0	26.7*	16.0
Snack Foods NESOI	24.0	21.5	26.2	26.7	28.7	28.6	28.0	-2.3
Breakfast Cereals	2.0	1.8	6.3	7.5*	6.6	5.0	7.1	42.4
Condiments & Sauces	6.0	7.2	6.4	8.7	9.2	10.0	11.8	17.5
Prepared Food	86.0	103.1	119.6	109.6	131.5	156.3*	153.4	-1.8
Wine & Beer	18.0	14.7	15.9	17.3	19.2	17.9	19.9	10.8
Non-Alcoholic Bev. (ex. juices)	14.0	15.7	18.1	21.1	33.4	45.5	54.5	19.7
Dog & Cat Food	25.0	22.9	23.3	30.5	31.3	33.6*	27.7	-17.6
Other Consumer Oriented	1.0	0.3	0.5	0.6	0.5	0.8	2.0	146.3
Agricultural Related Products	89.0	82.8	113.8	147.9	152.3	146.1	142.2	-2.7
Distilled Spirits	4.0	4.5	10.2	10.9*	7.4	7.6	9.3	21.4
Ethanol (non-bev.)	1.0	0.3	2.8	0.4	0.1	0.1	0.8	681.6
Biodiesel & Blends > B30	0.0	0.0	0.0	22.0	28.9*	9.6	0.0	-
Forest Products	61.0	52.4	70.1	73.3	75.7	84.0	85.6	1.9
Fish Products	24.0	25.6	30.7	41.3	40.1	44.9	46.6	3.8
Agricultural Products	3,419.0	2,987.9	3,190.1	3,612.4*	3,210.4	3,081.1	3,493.2	13.4
Agricultural & Related Products	3,508.0	3,070.7	3,303.9	3,760.3*	3,362.7	3,227.2	3,635.4	12.6

Prepared By: Global Policy Analysis Division/OGA/FAS/USDA
Source: U.S. Census Bureau Trade Data
* Denote Highest Export Levels Since at Least CY 1970
+Values of $0.05 million or more are rounded to $0.1 million
www.fas.usda.gov/GATS
GATSHelp@fas.usda.gov
Biodiesel aggregate includes only higher-level and pure biodiesel HTS chapter 38 codes; biodiesel blends below 30% by volume (aka. petroleum oils containing biodiesel) found in chapter 27 are excluded.

SECTION IV. BEST PRODUCT PROSPECTS

Category A: Products Present in the Market That Have Good Sales Potential

Product Category	2014 Import Market size	2014 Imports (US$Mil)	5-Yr. Avg. Annual Import Growth	Import Tariff Rate	Key Constraints Over Market Development	Market Attractiveness for USA
Beef and beef variety meat	104,831 MT	$709.0	1.5%	Beef: NT$10 per kilogram Beef variety meat: 15%	The U.S. remains the largest beef supplier, in terms of value, since 2013 after the Taiwan developed new import regulations for beef that contains ractopamine. Primary competitors are Australia and New Zealand with perceived acceptable quality at lower prices.	The U.S. beef industry is able to supply large volumes of "Asian cuts" at prices competitive with Australia and New Zealand The quality of U.S. chilled beef has been well recognized by Taiwan consumers.
Cheese	26,132 (MT)	$135.8	5.4%	5%	The U.S. is becoming more competitive in cheese supply to Taiwan and replaced New Zealand to become the largest supplier in 2012. Home cooking applications are not yet popular.	U.S. market share is increasing, reflecting the growing acceptance of U.S. cheese. Cheese demand in Taiwan continues to grow due in large part to the promotion of new bakery goods utilizing various cheese varieties. The

						most popular and fastest growing cheese varieties are cream cheese and mozzarella.
Fish and Seafood Products	265,031 (MT)	$932.2	0.9%	Varies by type	With a bias in favor of fresh fish and Southeast Asian variety crustaceans, U.S. exporters will need to work hard to gain market share.	Most U.S. seafood products are consumed in restaurants rather than purchased in supermarkets or traditional wet markets. The food service/HRI venues with a strong Western orientation and up-market positioning offer the current best opportunities for U.S. exporters.
Poultry Meat	143,309(MT)	$185.6	7.5%	20%	Import quotas on poultry meat were eliminated in 2005, but a special safe guard (SSG) raises the tariff to about 26.6%.	U.S. dominates more than 80% of the import poultry market. Taiwan consumers prefer dark meat over breast meat, so the top import items are poultry legs, thighs and some wings. Significant opportunities exist, in particular for those producers who are able to address importer

						needs regarding cut and packaging specifications.
Tree Nuts	25,452 (MT)	$132.6	1.6%	Varies by type	Competition to U.S. pistachios comes from the Middle East.	U.S. dominates the market for almonds and walnuts. Almonds and walnuts are already widely used, while the baking industry needs to learn how to use pecans in products.

Source: Taiwan Bureau of Foreign Trade: Taiwan Council of Agriculture

SECTION V. POST CONTACT AND FURTHER INFORMATION

Contact Information for FAS Offices in Taiwan and in the United States

For Trade Policy/Market Access and General Agricultural Issues:

Taiwan
American Institute In Taiwan, AIT, Taipei

Office Hours:	8:00 AM – 5:00 PM
Telephone:	(011-866-2) 2162-2316
Fax:	(011-886-2) 2162-2238
Email-FAS:	agtaipei@fas.usda.gov

Pouch - Diplomatic Agricultural Section Department of State (AGR) 4170 AIT Taipei Place Washington, DC 20189-4170	**Physical Location** American Institute in Taiwan No. 7, Lane 134, Xinyi Rd., Sec 3 Taipei, 10659 Taiwan
Foreign Service Personnel Garth Thorburn (Chief) Emily Scott (Deputy Chief)	**Locally-Employed Staff** Vacant (Assistant) Rosemary Kao (Ag Specialist) Chiou Mey Perng (Ag Specialist) Ping Wu (Ag Specialist)

For Market Development Assistance:

Taiwan Agricultural Trade Office - Taipei, ATO, Taipei	
Office Hours:	8:00 AM – 5:00 PM
Tel-Direct Line:	(011-886-2) 2705-6536
Fax:	(011-886-2) 2706-4885
Email-FAS:	atotaipei@fas.usda.gov

Pouch - Diplomatic	**Physical Location**
Agricultural Trade Office Department of State (ATO) 4170 AIT Taipei Place Washington DC 20189-4170	ATO / American Institute in Taiwan Suite 704 Lotus Mansion 7th fl No. 136 Renai Road Sec. 3 Taipei Taiwan

Foreign Service Personnel	**Locally-Employed Staff**
Mark Ford (Director)	Angelique Su (Admin Assistant) Cindy Chang (Ag Mktg Specialist) Cleo W. Y. Fu (Ag Mktg Specialist) Katherine Lee (Ag Mktg Specialist)

USDA Stakeholders

The Agricultural Trade Office (ATO) works with a large number of U.S. industry organizations, several of which are residents or have local representatives in Taiwan. These cooperators share the view that Taiwan is a promising market for agri-food products.

USDA Producer Associations - Taiwan Representatives (and PR Firms)

<table>
<tr><th>COOPERATOR</th><th>LOCAL AGENT</th><th>CONTACT</th><th>PHONE</th><th>FAX</th><th>ADDRESS</th><th>E-mail</th></tr>
<tr><td>California Agricultural Export Council – Pomegranate</td><td rowspan="5">Steven Chu & Associates</td><td rowspan="5">Steven Chu</td><td rowspan="5">(8862) 27261939</td><td rowspan="5">(8862) 27261815</td><td rowspan="5">10F-3, 508 Chung Hsiao E. Rd., Sec. 5, Taipei</td><td rowspan="5">scafms@ms11.hinet.net</td></tr>
<tr><td>California Milk Advisory Board</td></tr>
<tr><td>Food Export Northeast/Midwest</td></tr>
<tr><td>Raisin Administrative Committee</td></tr>
<tr><td>Pear Bureau</td></tr>
</table>

Northwest						
Ginseng Board of Wisconsin						
Washington Apple Commission						
California Table Grape Commission	PR Consultants Ltd.	Rosaline Chen	(8862) 87898939	(8862) 27252155	7D07, 5 HsinYi Rd., Sec. 5, Taipei	rosalinec@prcon.com
U.S. Dairy Export Council						
USA Rice Federation						
Wine Institute of California						
US Potato Board						
California Agricultural Export Council	n/a	Irene Tsai	(8862) 87898855	(8862) 87898833	Suite7C-06, Taipei World Trade Center, 5, Hsin-Yi Rd., Sec5, Taipei	CAEC-Asia@umail.hinet.net
Northwest Cherry Growers Association	n/a	Herman Kuo	(88609) 32123482	(8862) 23627676	3F, 14, lane 26, Tai-shun St. Taipei Taiwan	Yikuo1976@gmail.com;
Oceanspray (beverage)	n/a	Daisy Hong	(8862) 25280606		9F-12, 188 Nanking East Road, Section 5, Taipei	d.m.hong@oceanspray.com
Oceanspray (ingredient)	n/a	Kenneth Wang	(8862) 25023331	(8862) 25041094	9F, 88 Chien Kuo N. Rd., Sec.2,	kenjohn@ms27.hinet.net

					Taipei	
U.S. Grains Council	n/a	Clover Chang	(8862) 25238801	(8862) 25030149	7F-1, 126 SungChiang Road, Taipei 10457	usgcchen@ms41.hinet.net
U.S. Highbush Blueberry Council	n/a	Tom Payne	(650) 3408563	(650) 3408568	865 Woodside Way, San Mateo, CA 94401-1611 USA	tpayne@tjpmd.com
U. S. Meat Export Federation	n/a	Davis Wu	(8862) 27361200	(8862) 27361500	12F-1, 23, Keelung Rd., Sec. 2, Taipei	taiwan@usmef.org; dwu@usmef.org.tw
U.S. Soybean Export Council	n/a	Julian Lin	(8862) 25602927	(8862) 25683869	6F, 27 Chang E. Rd. Sec.1, Taipei	jlin@ct.ussec.org
U.S. Wheat Associates	n/a	Ronald Lu	(8862) 25211144	(8862) 25211568	3/3, lane 27, ChungShan N. Rd., Sec.2, Taipei, Taiwan	rlu@uswheat.org

Other Relevant Reports

Reports on the Taiwan food and agricultural market are available on the FAS website. The search engine can be found at: http://gain.fas.usda.gov/Pages/Default.aspx

Regulation Update on Genetically Engineered Feed Products|Biotechnology - GE Plants and

Animals Grain and Feed Oilseeds and Products|Taipei|Taiwan|12/11/2015 Under Taiwan's Feed Control Act, amended on February 4, 2015, all genetically engineered (GE) products for animal feed use are now required to register with Taiwan's Council of Agriculture (COA) for premarket approvals by February 4, 2017. While the non-food GE event application and approval process has, thus far, proceeded without concern, COA has yet to finalize certain guidelines. Regulation Update on Genetically Engineered Feed Products_Taipei_Taiwan_12-3-2015
New Organic Legislation developed by Taiwan authority|Agriculture in the News Special Certification - Organic/Kosher/Halal|Taipei|Taiwan|12/7/2015 On November 9, 2015, authorities at Taiwan's Council of Agriculture (COA) released draft legislation regarding the production, marketing, testing, and labeling of organic products, including imported products, as well as regulations regarding organic equivalency between trading partners. The draft text is currently available for local, public review and comment. Taiwan authorities committed to notifying text to the World Trade Organization (WTO) for a 60-day member comment period. An unoffic... New Organic Legislation developed by Taiwan authority_Taipei_Taiwan_12-3-2015
Dairy, Milk, Fluid, Dairy, Dry Whole Milk Powder, Dairy, Milk, Nonfat Dry, Dairy, Butter, Select, Dairy, Cheese 2015|Dairy and Products|Taipei|Taiwan|10/20/2015 As a result of slight improvements throughout Taiwan's dairy cattle industry, domestic milk production is projected to increase steadily to 380,000 metric tons (MT) in 2016, up from 374,000 MT in 2015. For the second year in a row, the 2015 Tariff Rate Quota (TRQ) of 21,949 MT for fluid milk was fully allocated and reflects the increasing demand for imported milk. Meanwhile, the United States surpassed Australia as the largest foreign supplier of fluid milk to Taiwan during the first half of 2... Dairy and Products Annual_Taipei_Taiwan_10-15-2015
Taiwan Expands GE Regulations|Biotechnology and Other New Production Technologies|Taipei|Taiwan|8/17/2015 In CY2014, Taiwan was the seventh largest export market for U.S. food and agricultural products, of which genetically engineered (GE) bulk and intermediate commodity accounted for nearly 40 percent of the total export value US$3.5 billion. Motivated by a series of food safety scandals, Taiwan's Legislative Yuan continued tightening regulations for GE food and feed products. The effect and enforcement of the February 2014 Act Governing Food Safety and Sanitation continues to develop, with many ... Agricultural Biotechnology Annual_Taipei_Taiwan_7-15-2015