

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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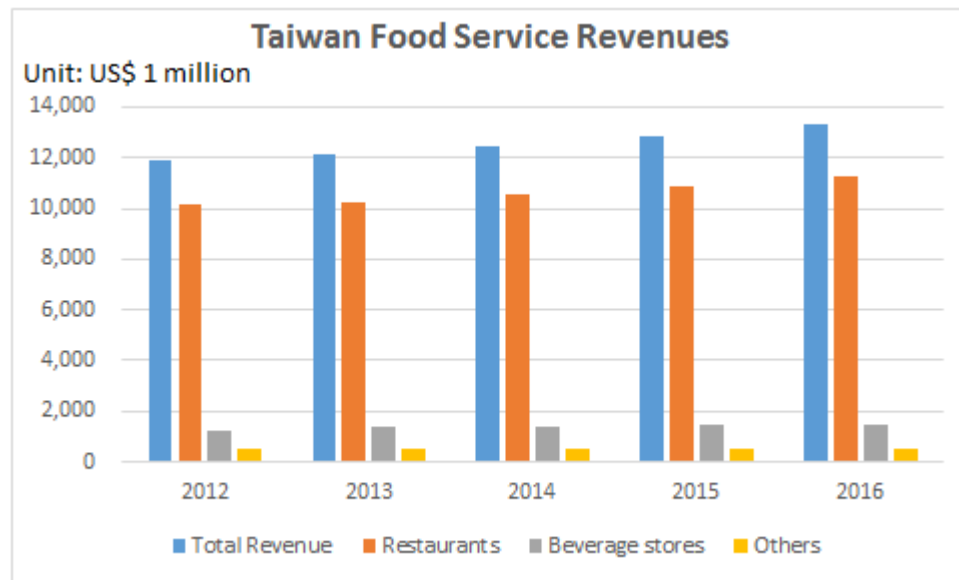
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Report Highlights:

Driven by an expanding tourism industry and solid domestic consumer demand, tremendous opportunities exist for U.S. agricultural exports to Taiwan. Total exports of U.S. agricultural goods reached US\$3.3 billion in 2016, making Taiwan the seventh largest export market by value. This report provides an overview of Taiwan's foodservice industry and its various sub-sectors.

SECTION I. MARKET SUMMARY

According to the Ministry of Economic Affairs (MOEA), the economic output of Taiwan's food service sector, excluding institutional food service, was estimated at US\$12.29 billion in 2016, a 3.6 percent increase from 2015. The increase in tourist arrivals helped drive foodservice revenue growth. Other factors such as the rise in consumer income, smaller family size, a growing number of working women and the development of e-commerce have helped the food service sector grow.



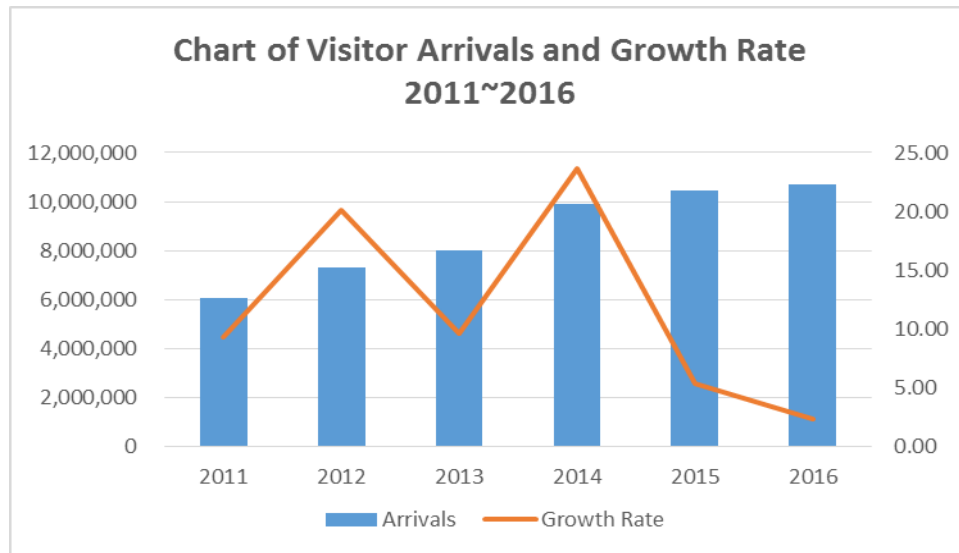
Source: Ministry of Economic Affairs (MOEA)

Taiwan consumers enjoy a very diverse food environment. In addition to various traditional Chinese foods, Japanese BBQ (Yakiniku), hot pot (shabu shabu), Thai food, Italian, and western fast food outlets are common. As food trends change, many of these food styles do not stay popular for very long, and only a few types of cuisine become 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 these markets use a wide variety of food ingredients both imported and locally produced. For example, french fries produced in the U.S. and Canada are offered side by side with locally produced sweet potato (yam) fries.

Tourism on the Rise

The government's tourism policy was a savior for the foodservice sector facing a declining population. According to government statistics, the number of foreign arrivals increased significantly since 2005, more than threefold to nearly 10.7 million in 2016. The explosive growth of direct flights from China and neighboring countries also generated significant revenue for the airline catering businesses.



Source: Tourism Bureau, Ministry of Transportation and Communication

Foodservice-Retail Marketing Alliance

With one store per 2,250 residents, Taiwan has the highest density of convenience stores in the world. Foodservice companies 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. In addition, many convenience stores were renovated to provide seating and dining places for consumers on tight schedules, creating a new model of business. This transformation helped 7-11 replace McDonalds as the largest licensed foodservice operation in Taiwan. Other convenience store chains also duplicate the same model to stay competitive.

Advantages and Challenges for U.S. Exporters

Advantages	Challenges
U.S. food products enjoy an excellent reputation among consumers.	U.S. food products are not always price competitive in Taiwan market.
The growing modern retail industry is looking for new imported food products.	Taiwan is the United States 7th largest market for agricultural exports but often overlooked by U.S. suppliers eager to export directly to China.
The majority of consumers have become more health conscious and less concerned about the price of food when shopping.	U.S. exporters are sometimes reluctant to change product specifications to comply with Taiwan requirements/consumer preferences.
The popularity of American holidays and culture/lifestyle lead to promotional events organized around these themes by restaurants and hotels throughout the year.	Many U.S. companies are unwilling to provide low volume, consolidated shipments of high-value products to importers/end users.
There is a wide variety of U.S. food products available to consumers.	Consumers maintain a preference for “fresh” food products over “frozen.”
Consumers are brand-conscious, and America is a leader in food brands that set trends.	Competition from agricultural and food exporters from countries with an FTA with Taiwan.
Increasing growth of fast food chains and casual dining restaurants is a key to industry growth.	Numerous food regulations and standards are not in line with U.S. or international standards.

SECTION II. ROAD MAP FOR MARKET ENTRY

Due to the limited size of their operations, the majority of HRI companies do not import directly. Instead, they tend to place small but more frequent orders with local suppliers that can meet such needs. Consequently, U.S. companies should concentrate their efforts 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 if there is a price difference.

For more information regarding export tips on food exports to Taiwan, please refer to FAS’ annual [Exporter Guide](#).

Market Structure

The majority of HRI companies purchase most of their food products from importers, distributors, wholesalers, regional wholesale markets, wet markets, supermarkets, and hypermarkets. 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 most products from local distributors or import directly.

A recent trend is that retail outlets such as Costco, are frequented by many small foodservice/HRI operators who buy items in bulk at the lowest possible cost, thereby avoiding the need to source from multiple importers.

Food and beverage managers, and executive chefs, working in the major international hotels are the key persons who make purchasing decisions. 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 international 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 either have their own distribution channels, or they contract with an independent distribution center to purchase, process, and deliver the daily needs to each outlet island-wide. Fast food chains also maintain their own R&D teams or work in close collaboration with one or more contracted catering service(s) to develop and frequently renew menus to meet consumers' demand.

Medium-level family-style chain restaurants 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.

HRI Distribution Channel Flow Diagram



Sub-Sector Profiles:

1. Hotels

Socializing in hotel restaurants is common in Taiwan. As a result, hotel restaurants have become a significant source of revenue. 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 on these occasions tends to be either Western-style buffets or Chinese-style food banquets. Also, holiday celebrations are becoming increasingly 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 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 and Christmas.

Major 5-star Hotels, Resorts, and Spas			
Hotel Name	F & B Revenue (US\$ million)	Location	Purchasing Agent
The Regent Taipei	\$49.85	Taipei	Direct Importers Distributors
Sheraton Grand Taipei Hotel	\$40.26	Taipei	Direct Importers Distributors
The Ambassador Hotel	\$33.8	Taipei	Direct Importers Distributors
Grand Hyatt Taipei	\$33.99	Taipei	Direct Importers Distributors
The Westin Taipei	\$22.66	Taipei	Importers Distributors

Source: ATO Survey; Ministry of Transportation & Communications

2. Restaurants (Eating and Drinking Places)

Based on MOEA data, the 2016 restaurant/beverage store sub-sector revenue climbed to \$13.3 billion, 3.5 percent over 2015. Gourmet Master (85°C Bakery Café), WowPrime (restaurant chains) and Uni-President Starbucks Coffee Company continue dominating the food service sector.

		Total Revenue (US\$ Million)	%Change 2016/2015
2016	Total	13,289	3.5
	Restaurants	11,250	3.7
	Beverage Stores	1,486	3.9
	Others (food courts, office building restaurants)	553	1.3

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 markets. Only larger chains/franchises tend to buy products from importers or import directly.

Company Name	Outlet Name, type, Number of Outlets (Taiwan only)	Location	Purchasing Agents
WowPrime Corp.	A local food service company operates more than 400 family-style restaurants under 16 brands in Taiwan.	Island-wide	Direct Importers
Ding Tai Fung	Ding Tai Feng (Chinese) (10)	North/Central	Importers Distributors
The Bayshore Pacific Group	T.G.I. Friday's (American style) (13)	Island-wide	Director Importers Distributors
	Texas Roadhouse (American style) (3)	North	
Hasmore Ltd. Co.	The operator runs several well-known western restaurant chains including Ruth's Chris and Chilis.	Island-wide	Director Importers Distributors
Sushi Express CO., Ltd.	A local food service company owns more than 200 sushi chain restaurants.	Island-wide	Director Importers Distributors
Yoshinoya	Yoshinoya (Japanese beef rice/fast food) (65)	Island-wide	Direct Importers Distributors

Company Name	Outlet Name, type, Number of Outlets (Taiwan only)	Location	Purchasing Agents
HuMax Taiwan Co, Ltd.	Mo Mo Paradise (Japanese)(19)	Island-wide	Direct Importers Distributors
	Bellini Pasta (7)	North	Importers Distributors
	Bellini Caffè (Italian) (3)	North	Importers Distributors
Cashcity Foodservice Co., Ltd.	Cashcity Shabu Shabu (Japanese) (145)	Island-wide	Direct Importers Distributors
Noble Family Co., Ltd	Noble Family Steakhouse, (steakhouse) (83)	Island-wide	Direct Importers
Shuh Sen Co., Ltd.	My Home Steak (Steakhouse) (48)	Island-wide	Direct Importers Distributors
TTFB Company Limited	A local restaurant chain operates family-style Thai and Chinese food restaurants under several brands.	Island-wide	Direct Importers Distributors

Breakfast Shops

There are over 12,000 breakfast shops in Taiwan. Most of them provide western foods such as hamburgers, sandwiches, milk tea, and coffee. The major franchise chains listed below will import ingredients if they cannot be sourced locally.

Company Name	Outlet Name, type, Number of Outlets (Taiwan only)	Location	Purchasing Agents
Hong Ya International Enterprise Co. Ltd.	Hong Ya Burger (719)	Island-wide	Direct Importers Distributors
Sun Spark Group	Laya Burger (520)	Island-wide	Direct Importers Distributors
Super-Mill Group Co. Ltd	My Warm Day (917)	Island-wide	Direct Importers Distributors
Ju-Lin Food Enterprise Co., Ltd.	Ju-Lin Mei-Er-Mei (1000)	Island-wide	Direct Importers Distributors

Company Name	Outlet Name, type, Number of Outlets (Taiwan only)	Location	Purchasing Agents
Good Morning Beauty Castle Enterprise Co., Ltd.	Good Morning Beauty Castle (1,004)	Island-wide	Direct Importers Distributors
Chiao Pei International Co., Ltd.	Eastern Beauty (310)	Island-wide	Direct Importers Distributors
Mei & Mei Foodservice Chain Group	Mei & Mei (2,500)	Island-wide	Direct Importers Distributors

Source: ATO Survey; Taiwan Chain and Franchise Annual Report

Fast Food

McDonald's, which opened its first outlet in 1984, remains the most significant fast-food chain in Taiwan with 397 stores. Competition among fast-food restaurants has become more intense since Japan-based MOS Burger expanded its presence in Taiwan.

Company Name	Outlet Name, type, Number of Outlets (Taiwan only)	Location	Purchasing Agents
McDonald's Restaurants (Taiwan) Co., Ltd.	McDonald's (fast food) (397)	Island-wide	Direct Importers Distributors
Burger King	Burger King (22)	Island-wide	Direct Importers Distributors
Subway Taiwan Development	Subway (Western) (138)	Island-wide	Direct Importers Distributors
Pizzavest Co., Ltd. (Regent Group)	Domino's Pizza (pizza) (135)	Island-wide	Direct Importers Distributors
Mercuries & Associates, Ltd.	Napoli Pizza (fast food/pizza) (91)	Island-wide	Direct Importers Distributors
An-Shin Food Service Co., Ltd.	MOS Burger (fast food) (246)	Island-wide	Direct Importers Distributors
Jardin Food Services (Taiwan) Co., Ltd.	KFC (fast food) (136)	Island-wide	Direct Importers Distributors
	Pizza Hut (Pizza) (211)	Island-wide	Direct Importers Distributors

Source: ATO Survey; Taiwan Chain and Franchise Annual Report

Chinese-style Fast Food

Chinese-style fast-food chains have sprung up all over Taiwan, and are popular with all ages of consumers. The shops typically specialize in dumplings, meatballs, sour-spicy soups, beef noodles, and Chinese stews. Chinese-style fast food chains tend to source most of their products locally, but import directly major food ingredients, such as pork and chicken.

Company Name	Outlet Name, type, Number of Outlets (Taiwan only)	Location	Purchasing Agents
Eight Way Food Co., Ltd.	8 Way Dumplings (Chinese/fast food) (791)	Island-wide	Direct Importers Distributors
Ji-Shang Industry Co., Ltd.	Wu Tao (Chinese) (211)	Island-wide	Direct Importers Distributors
Mercuries & Associates, Ltd.	Mercuries Food Chain (Chinese/fast food) (150)	Island-wide	Direct Importers Distributors

Source: ATO Survey; Taiwan Chain and Franchise Annual Report

Coffee Shop Chains

Coffee consumption has seen rapid growth in recent years, and sales now exceed US\$2 billion. Coffee imports, including raw and roasted coffee, has more than doubled in volume since 2005 and now stands at 30,000 metric tons.

Current annual per capita coffee consumption in Taiwan is 130-140 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).

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 has created a niche market for imported candy/chocolate and cookie products. Many coffee shops not only sell coffee and light meals, but also sell candy/chocolate/cookie products with small and attractive packaging.

Company Name	Outlet Name, type, Number of Outlets (Taiwan only)	Location	Purchasing Agents
Gourmet Master Co., Ltd.	85°C Bakery Café (coffee) (412)	Island-wide	Direct Importers Distributors
Uni-President Starbucks Coffee Company	Starbucks (coffee) (406)	Island-wide	Direct Importers Distributors
Dante Coffee and Foods Co., Ltd.	Dante (coffee) (113)	Island-wide	Direct Importers Distributors
eCoffee Co., Ltd.	eCoffee (coffee) (95)	Island-wide	Direct Importers Distributors
Mr. Brown Coffee Shop	Mr. Brown Coffee (coffee) (53)	North	Direct Importers Distributors
Barista	Barista Coffee (coffee) (30)	Island-wide	Direct Importers Distributors
Ikari Coffee Co., Ltd.	Ikari (coffee) (54)	North/Central/East	Direct Importers Distributors
Cama Co., Ltd.	Cama (coffee) (100)	Island-wide	Direct Importers Distributors
Louisa Coffee Co., Ltd.	Louisa Coffee (coffee) (272)	Island-wide	Direct Importers Distributors

Source: ATO Survey; Taiwan Chain and Franchise Annual Report

Soft Drink Bars

Soft drink bars are a common sight on almost every street corner in major cities. This type of 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 sold at these shops.

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 primary ingredients used in these businesses.

Company Name	Outlet Name, type, Number of Outlets (Taiwan only)	Location	Purchasing Agents
Chun Shui Tang Cultural tea house	Chun Shui Tang (Tea Restaurant) (44) TP tea (Tea Bar) (225)	Island-wide	Direct Importers Distributors
Tea Professional Intl Chian Group	Tea Professional (Tea Bar) (120)	Island-wide	Direct Importers Distributors
Chuan Yi Tung Business Co. Ltd.	Ching Shin Fu Chuan (Tea Bar) (928)	Island-wide	Direct Importers Distributors
OCOCO International Co.	CoCo (Tea Bar) (300)	Island-wide	Direct Importers Distributors
COMEBUY International Co.,Ltd	COMEBUY (Tea Bar) (112)	Island-wide	Direct Importers Distributors
Presotea Co., Ltd.	Presotea (Tea Bar) (274)	Island-wide	Direct Importers Distributors
Shen-Geng Tea Co., Ltd.	50 Lan (Tea Bar) (526)	Island-wide	Direct Importers Distributors

Source: ATO Survey; Taiwan Chain and Franchise Annual Report

3. Institutional

Airline Catering

Evergreen Sky Catering Corporation, China Pacific Catering Service, and the Kaohsiung Airport Catering Services, dominate the local air catering market. Because of the strong competition between them, the companies are aggressively expanding their catering business to include local convenience stores, restaurants, coffee shops, schools, and hospitals. The companies mostly purchase ingredients from local importers, manufacturers, and wholesalers. However, they will import meat and poultry directly.

Company Name	Outlet Name, type, Number of Outlets (Taiwan only)	Location	Purchasing Agents
Evergreen Sky Catering Corporation	Evergreen Sky Catering Corporation	North	Direct Importer Distributor
China Pacific Catering Service	China Pacific Catering Service	North	Direct Importer Distributor
Kaohsiung Airport Catering Services	Kaohsiung Airport Catering Services	South	Importer Distributor

Source: ATO Survey

SECTION III Competition

According to Taiwan's Council of Agriculture, Taiwan imported US\$3.33 billion of food and agricultural products (including edible fishery and forestry products) from the United States in 2016, representing 26.5 percent of the total import market share. The United States also exports many high-valued consumer-oriented agricultural products, including beef, poultry, fresh fruit and vegetables, dairy, tree nuts and processed foods and beverages.

The United States is the leading supplier of the following products primarily used by food service operations:

Taiwan Agricultural Products Import Statistics

Product Category	Total Import Value 2016 (US \$Mil)	Major Supply Sources and Market Share	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
Meat & Poultry				
Beef and beef offal	776.8	1. USA - 46.92% 2. Australia - 26.82% 3. N. Zealand - 20.09%	The U.S. is traditionally the largest chilled and high-end beef products supplier, while Australia and New Zealand dominate the market for cheaper beef cuts.	Taiwan's beef production only accounts for approximately 5% of total beef consumed on the island.

Product Category	Total Import Value 2016 (US \$Mil)	Major Supply Sources and Market Share	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
Poultry	164.0	1. USA - 93.35% 2. Canada - 6.38%	Consumers' preference for dark meat provides opportunities for western countries. USA products are price competitive.	Local chicken dominates the market.
Fish & Seafood				
Rock Lobster and Other Sea Crawfish, Frozen	29.6	1. Nicaragua – 30.45% 2. Cuba – 22.49% 3. USA – 10.79%	Nicaragua's market share is up drastically in 2016, replacing Cuba and the USA to become #1 supplier.	Lobsters are rare along Taiwan's coastlines.
Live Lobsters	14.7	1. Canada – 61.14% 2. USA – 38.29%	U.S. and Canada are the major suppliers of live, fresh and chilled lobsters.	Lobsters are rare along Taiwan's coastlines.
Alaska Pollock, Frozen	4.7	1. USA – 99.41% 2. China – 0.59%	Pollock is popular in Taiwan but often confused among other similar fish such as cod or halibut.	No Pollock along Taiwan's coastlines.
Dairy Products				
Cheese and Curd	133.5	1. N. Zealand – 26.48% 2. USA – 24.28 3. Australia – 11.67% 4. Argentina – 7.89%	New Zealand regained its first place as Taiwan's largest cheese supplier, while the U.S remains competitive in cheese supply to Taiwan.	Local production is limited.

Product Category	Total Import Value 2016 (US \$Mil)	Major Supply Sources and Market Share	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
Fresh Vegetable				
Fresh Vegetables	202.7	1. USA – 37.53% 2. Spain – 14.49% 3. Vietnam – 9.45% 4. China – 9.07%	The U.S. continues to be the leading supplier of broccoli, onions, lettuce, and potatoes.	Local products dominate the market.
Alcohol and Other Beverages				
Wines, wine, and sparkling wine	174.3	1. France – 51.37% 2. USA – 9.45% 3. Australia – 8.02% 4. Chile – 7.94% 5. Italy – 7.70% 6. Spain – 6.22%	France dominates the market, but new world countries are gaining traction due to competitive pricing.	Local companies are not yet able to produce quality wine.
Beer	185.8	1. Netherlands – 55.90% 2. China – 19.02% 3. Japan – 6.79% 4. USA – 5.28%	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	47.9	1. USA – 33.39% 2. Malaysia – 22.58% 3. Japan – 20.77%	The U.S. is the largest supplier of roasted coffee while Indonesia, Brazil, while other tropical countries supply most of the non-roasted coffee beans.	Local production is small.

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

SECTION IV. BEST PRODUCT PROSPECTS

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

Product Category	Imports From the U.S. In 2016 (US\$ million)	The U.S. Market Share (% of total import market)	Key Constraints over Market Development	Market Attractiveness for the USA
Beef	364	46.92	U.S. does not have full market access for its beef products to Taiwan due to lingering BSE and ractopamine concerns.	Taiwan consumers have high regards for U.S. beef regarding quality and safety.
Chicken	130	91.94	Special safeguards (SSG) raise the tariff from 20 percent to about 26.6 percent.	The U.S. is one of a few countries certified to export poultry meat to Taiwan.
Fresh Vegetables	76	37.53	Local production meets most of the vegetable demand.	The U.S. continues to be the leading supplier of broccoli, onions, lettuce, and potatoes.
Cheese	32	24.28	New Zealand enjoys duty-free access as a result of a free trade agreement signed with Taiwan in 2013.	Consumption of cheese products continues to grow.

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

Section V. POST CONTACT AND FURTHER INFORMATION

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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>

Exporter Guide |Exporter Guide SP1 - Expand International Marketing Opportunities Taipei ATO|Taiwan|12/7/2017

[Exporter Guide Taipei ATO Taiwan 12-5-2017](#)

Retail Foods |SP1 - Expand International Marketing Opportunities Taipei ATO|Taiwan|12/20/2017

[Retail Foods Taipei ATO Taiwan 12-15-2017](#)

Dairy, Milk, Fluid, Dairy, Dry Whole Milk Powder, Dairy, Butter U.S. Milk Exports to Taiwan on Track to Reach New Record Dairy and Products|Taipei|Taiwan|10/17/2017

[Dairy and Products Annual Taipei Taiwan 10-12-2017](#)

Growing Demand for Organics in Taiwan Stifled by Unique Regulatory Special Certification - Organic/Kosher/Halal|Taipei|Taiwan|9/19/2017

[Growing Demand for Organics in Taiwan Stifled by Unique Regulatory B Taipei Taiwan 9-7-2017](#)