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Market Brief - Sector

Taiwan : Food Processing Sector Report

Taipei [TW1], TW

Food Industry Overview

Taiwan has been one of the economic stars in Asia. In spite of the spillover effect of the Asia financial crisis, Taiwan's real GDP grew 4.83% in 1998. Although this is not as lustrous a growth rate as in previous years, Taiwan's economy remains sound. Taiwan's food processing sector is composed mainly of small and medium enterprise and these firms were able to be more flexible in dealing with the regional financial crisis. Some companies even reported growth rates of 10% in 1998.

According to U.S. trade statistics, Taiwan imported approximately $1.7 billion worth of U.S. bulk commodities, $355 million worth of U.S. intermediate food and agricultural products, and $595 million worth of U.S. consumer-oriented products. However, according to a survey conducted by the Ministry of Economic Affairs, revenue from Taiwan's food industry fell 5.8% during the first ten months of 1998, compared to the same period last year. The deterioration in the food sector was due mainly to three factors: 1) unstable currency exchange rates, particularly vis-a-vis the U.S. dollar and Japanese Yen; 2) a labor shortage; 3) shrinking export markets due both to the economic crisis and the residual effects of the foot-and-mouth disease outbreak in 1997. For 1998, two way agricultural trade is forecast to fall approximate 15%.

Despite this rather gloomy snapshot of the food sector, long term prospects for the food ingredients market remain good. While the food processing sector was clearly affected by the Asian financial crisis, the industry is expected to rally when the economy improves and trading partners become solvent again.

Total value of Taiwan's food production was $17.4 billion (NT$497 billion) in 1997, down $2.6 billion from the previous year. This was the first ever decline in production. The decrease was attributed mainly to the March 1997 foot-and-mouth disease outbreak, which adversely affected food production across the board including the feed, slaughtering, and edible oils/fat sectors. Table 1 highlights the changes in the processed food sectors.

Table 1 - Taiwan Food Industry Production Value in N.T. Billions

Industry Sector	1995	1996	1997	% of total production value in 1997
Frozen Food	74	77	48	9.6%
Non-Alcoholic Beverage	40	39	40	8.0%
Miscellaneous Food	38	41	38	7.6%
Wines, Liquors & Spirits	24	25	25	5.0%
Beer Brewing	21	21	21	4.2%
Bakery	15	14	15	3.0%
Noodles	9	10	12	2.4%
Canned Food	10	10	10	2.0%

Industry Sector	1995	1996	1997	% of total production value in 1997
Candy & Confectionery	6	7	7	1.4%
Preserved Food	3	3	2	0.4%
Dehydrated Food	2	3	2	0.4%
Total	242	249	227	44%

Source: Department of Statistics, Ministry of Economic Affairs

Table 2 - Market Size of Food Processing Sub-Sectors

Food Processing Industry Sector	Sales in U.S. Million Dollars (in $1,000,000)	Estimated Growth (in percent)
Frozen Foods	$1,600	10-15%
Non-alcoholic Beverage	$1,400	5%
Bottled Tea	$308	10%
Dairy	$670	10%
Bakery	$520	3%
Noodles	$443	8%
Chicken & Other Essence	$70	5%
Soups	$28	10%

Source: The Ministry of Economic Affairs & The Food Industry Research & Development Institute

Taiwan's food market size in each Sub-Sector is rather small, as are profit margins, but on the whole these Sub-Sectors are experiencing healthy growth rates (see Table 2). However, due to the globalization of the market, local processed food products are facing intensified competition from imported finished products. With finished product imports rising, local food processors' profit margins have become even tighter. Consequently, through foreign joint ventures and overseas investments, they have been trying to enlarge their production base to capture some economies of scale. Both Taiwan's overseas investments and foreign investments on Taiwan in food processing have grown tremendously. According to the Ministry of Economic Affairs, during the past five years, Taiwan's food companies have invested approximately $1.0 billion in the PRC and $194 million in other countries (mainly southeast Asia). Meanwhile, foreign investment in Taiwan has reached $347 million over the same period. See Table 3 for a list of U.S. food companies with investments on Taiwan.

Table 3 - U.S. Food Companies with Direct Investments on Taiwan

Company Name	Local Office
Blanco Enterprise Co.	3/F, 7 Ba Der Rd., Lane 768, Sec. 4, Taipei Tel: 886-2-2647-4559 Fax: 886-2-2788-8982
CPC/AJI Ltd., Taiwan	7/F, 108 Nanking E. Rd., Sec. 5, Taipei Tel: 886-2-2764-1833 Fax: 886-2-2764-1933
Havi Food Services Ltd., Taiwan	1084 Hu Kuo Rd., Sec. 3, Lu-Chu, Taoyuan Tel: 886-3-322-3550 Fax: 886-3-322-2551
M.A. Cargill Trading Ltd.	7/F, 153 HsinYi Rd., Sec. 3, Taipei Tel: 886-2-2703-5803 Fax: 886-2-2755-5158
Nabisco Taiwan co.	14/F, 4 MinChuan E. Rd. Sec. 3, Taipei Tel: 886-2-2515-7789 Fax: 886-2-2515-3109
Nestle Taiwan Group	10/F, 180 ChungHsiao E. Rd., Sec. 4, Taipei Tel: 886-2-2773-9910 Fax: 886-2-2751-8810
Standard Foods Taiwan Ltd.	Rm.801, 8/F, 136 RenAi Rd., Sec. 3, Taipei Tel: 886-2-2709-2323 Fax: 886-2-2717-4563
Swire Coca-Cola Taiwan Ltd.	46 HsingPang Rd., Taoyuan City, Taoyuan Tel: 886-3-364-8800 Fax: 886-3-364-9900
Wrigley Taiwan Ltd.	9/F, 112 ChungHsiao E. Rd., Sec. 1, Taipei Tel: 886-2-2322-3123 Fax: 886-2-2392-1741

Source: American Chambers of Commerce, Taipei and Kaohsiung

Taiwan’s economy is dynamic and the standard of living is rising with economic growth. Local consumers’ taste buds are internationalizing as well. In general, competition in the food sector is keen. Consequently, Taiwanese food companies are seeking international partners interested in joint ventures to compete against imported consumer-oriented food products and to help export Taiwanese food and agricultural products to new markets. This type of cooperative relationship is expected to increase in the near future.

Advantages

- When Taiwan joins the WTO, gradual tariff reductions on food and agricultural products should help boost imports of food ingredients for local processing in some sectors.
- U.S. origin food ingredients are perceived to be innovative and high quality.
- Taiwan is beginning to seek functional foods and the U.S. is on the cutting edge for research in this area.

Challenges

- When Taiwan joins the WTO, competition from other countries will increase. Greater market access also will encourage more imports of finished food products. Thus, demand for some food ingredients for local processing may go down.
- Taiwan's food additive laws are stringent and do not always conform to international standards
- In January 1999, Taiwan's Bureau of Foreign Trade increased from 19% to 23% the number of food ingredients/agricultural products allowed entry from the PRC. As Taiwan relaxes its indirect trade policy with the PRC, the market will become even more price competitive.

Trends

Consumers in Taiwan are becoming increasingly health conscious. They are beginning to look for healthy, low-fat food options. Functional foods and organic foods are becoming more and more popular. In addition, finished foods labeled "No Artificial Food Additives" appear to have captured consumer interest. Local food processors are seeking natural food additives, food ingredients with scientifically proven health benefits, and certified organic food ingredients for local processing. The U.S. appears to have a competitive advantage for high value and high tech food ingredients, because local food processors associate U.S. origin with high quality.

Flavors or products usually are in vogue on Taiwan for a two-to-three year cycle. These new food fashions often follow trends in the Japanese market. U.S. suppliers who recently have been successful in introducing their product into the Japanese market should consider exploring the Taiwanese market. Current food trends on Taiwan are products that are low in fat, salt, and sugar, or high in vitamins and mineral. For example, the market for both green tea and oolong tea grew 14% and milk tea grew 49% in 1997, partly because of the belief in the anticarcinogenic properties of those teas. The bottled tea market was valued at approximately $308 million in 1997 and the market is expected to remain strong for the next few years. Teas, which contains *"catechins*," are being promoted as functional foods. In addition to bottled tea, bottled coffee, pure juice, low calorie beverages with sugar substitutes, fiber drinks with Arabia gum, and energy drinks with vitamins and minerals are very popular on the Taiwan market. Market demand for vegetarian foods and organic foods also is forecast to grow.

Market Structure

Distribution and retailing costs on Taiwan are relatively high. In general, almost 40% of a product's retail price goes towards a "shelf fee" for a supermarket or hypermarket. In the case of a convenience store the shelf fee can be as high as NT$30,000 per product (approximately $925). There are additional charges for store promotional activities. For this reason, many food processing companies have set up their own retail chains and distribution systems. They not only import food ingredients for local processing, but also import finished products to sell in their retail chains.

In the Taiwan market, the majority of food ingredients are imported. They generally are brought in directly by an import agent who sells to the local food processor. For distribution purposes, food ingredients can be divided into two groups: *bulk* and *high value/high tech* food ingredients (based on the weight as a percentage of the food formula).

* *Bulk food ingredient*s are exported directly by the foreign supplier and imported directly by the local food processor, although sometimes these products go through a broker or export agent (i.e. the local representative of the foreign food ingredient supplier). Imports of bulk food ingredients usually are shipped by the container load and are very price-sensitive. Most well-established food processors own an import company to engage in these transactions on their behalf.

* *High value/high tech food ingredients* generally are marketed through import agents with exclusive distribution rights. They maintain stocks of the food ingredient and act as both the importer and wholesaler. Food additives (chemicals) fall in this category. For certain high tech food ingredients, including essences or extracts, most suppliers have foreign export agents or branch offices on Taiwan. This is mainly to provide sales support and assistance with food product formulation.

Best Prospects

There are plenty of opportunities for growth in food ingredient exports, particularly in the following areas:

* *Flavorings*--According to a survey conducted by the Industrial Development Bureau, the market for "sweet" flavor additives used in nonalcoholic beverages, dairy products, bakery, and confectionary products was valued at $580 million in 1996. Approximately 15% of these flavor additives were domestically produced and the remaining 85% were imported (47% from Japan, 20% from the EU, 12% from the United States, and 6% from other countries). The market for "salty" flavor additives for instant noodles, canned or frozen prepared foods, meat products, and snack foods, also was valued at $580 million. Approximately 28% were domestically produced, while the remaining 72% were imported (39% from Japan, 23% from the United States, 6% from the EU, and 4% from other countries). Because Taiwanese tastes are similar to Japanese tastes, Japan continues to dominate the flavor additives market. According to an Industrial Development Bureau survey, soft drinks accounted for 77% of total consumption of sweet flavor additives, and instant noodles accounted for 43% of total consumption of salty flavor additives. Salty flavor additives usually combine spices and powered meat products to create a Chinese

style seasoning.

* *Spices and Premixed Seasonings Ingredients for Soups*--Oriental spices and powdered beef, pork, and chicken are commonly used in dried soup seasonings. Since powdered meat products generally are expensive and do not store well, processors prefer to purchase premixed meat based seasonings. In 1997, Taiwan imported 667 mt of broth/soup seasoning ingredients worth $3 million. Hong Kong had a 47% share of the imported premixed soup ingredients market, whereas the United States only accounted for 9% of the market. Spice imports for 1998 were valued at $13 million, with Asia meeting most of the demand.

* *Concentrated chicken essence* for making chicken essence drink, a nutrient supplement drink, has good market potential on Taiwan. Chicken essence made from imported concentrate is very competitive with domestic chicken essence. However, trade sources note imported essence generally has less chicken flavor. Ginseng and other herbs are often used as seasoning in these chicken essence drinks in order to add ingredients with other health benefits.

* *Dried Vegetables, Fruits, Meat and Fishery Products*--The dried food ingredients market amounted to 144,000 mt, of which 92% were imported in 1997. Taiwan imported dried vegetables (87,000 mt), dried fruits (43,000 mt), dried fishery products (1,600 mt), and dried meat (1 mt), with a total value of $128 million. Dried fruits and dried vegetable mixes are popular new snacks. Most dried products, other than fruits, are used mainly as dried soup ingredients. The dried soup market is expected to grow (see above *Spices and Seasonings for Soup*), so dried ingredients for these products also are expected to grow. Powdered meat, fish and vegetables used in snacks also show good market potential.

* *Ingredients for Snack Foods*--The snack food market is clearly divided between locally produced products and imports. Imported snack foods are basically “western” flavored potato and corn based products, whereas locally produced snacks are made of corn, peas, and potatoes with an “oriental” seasoning. The snack food market is very active and the life cycle is very short, usually only around two years. Consequently, local food companies are always inventing new products for the market. The size of the snack food market is expected to remain stable in the near future, but there are always market opportunity for new product formulas. Thus, this sector offers good trade opportunities for U.S. food ingredients, since food ingredients for snacks are usually imported.

* *Ingredients for Dairy Products*--In a recent well-publicized Department of Health study, it was revealed that most Taiwanese adults fail to get the recommended daily calcium intake of 600 mg. Consequently, many more consumers are purchasing dairy products, such as yogurt and yogurt drinks. Retail outlets estimate these products are growing by 10% a year. Currently the market of locally produced dairy products is valued at $670 million, of which 85% is accounted for by milk, yogurt/yogurt drinks, and ice cream. In 1997, Taiwan imported the following 126,000 mt of dairy products worth $351 million: milk powder or block (97,000 mt), milk butter (13,000 mt), cheese/milk curd (7,000 mt), evaporated/condensed milk (7,000 mt), and fresh milk cream (2,000 mt). The United States accounted for only a small portion of these imports (11%), whereas EU countries (22%), New Zealand (42 %), and Australia (22%) dominated.

* *Ingredients for Bakery Products*--The baked goods market is reported to be valued at $520

million. Cookies, crackers and biscuits account for approximately 35% of this market and the competition for market share is stiff. Imports grew from 6% in 1991 to 15% of the total market by 1996. This upward trend is expected to continue with a 3% growth rate estimated for the near future. Imports of pre-cooked multi-grains for use in whole-grain and multi-grain breads and imports of dried nuts, dried fruits, and fruit fillings for use in cookies and pastries, have all been rising.

* *Gluten, Starches, and Dextrins*--recently, local wheat food processors have been using vital gluten to make the proper protein ratio in the flour used to make top quality Japanese style udon noodles. According to Taiwan Customs, there were no imports of vital gluten reported in 1997, whereas, imports jumped to 90 mt (valued at $98,000) during the first ten months of 1998. France supplied 67%, Australia 22%, Vietnam 10%, and the remaining 1% came from other countries. Taiwan imports a great deal of food starch and dextrins for food processing (approximately 411,000 mt in 1997, valued at $97 million). The following countries were the principal suppliers based on volume: Thailand accounted for 76% (mainly cassava starch), the EU supplied 11% (mainly potato starch), Korea and the PRC provided 9% (mainly corn starch), and Australia accounted for 4% (mainly wheat starch). In general, the United States is not competitive in the raw starch market, since it is price-driven. However, for the modified starch market, which was valued at $18 million in 1997, the United States held an 8% market share, behind Southeast Asia and the EU. For dextrins, a market valued at $2 million in 1997, the United States had a 16% share of total imports. The other leading suppliers were South Africa (30%), Brazil (25%), and France (15%). Starch and dextrin imports are expected to increase gradually along with consumer demand for domestically produced frozen foods and noodles.

* *Ingredients for High Fiber Food or Low Calorie Food*--Low calorie and high fiber foods and beverages are growing in popularity in Taiwan. Dessert/snack gelatins with tea, coffee, or fruit flavors, and egg and milk puddings have flooded the market. These gelatins and puddings are promoted as being low in calories and beneficial in reducing cholesterol. Consumption of natural food grade gums, casein, pectin, and gelatin reached $21 million in 1997. Almost all of these food ingredients are imported. In 1997, Taiwan imported approximately 1,462 mt of gums, 714 mt of casein and casein derivatives, and 1,036 mt of pectin and pectin derivatives. Another common ingredient in many Taiwanese food items, is a Japanese origin plant powder named Konyaku (ChuJo in Chinese) and a fiber ingredient made of palm meat. These two additives are used to increase the fiber content in many processed foods.

* S*oy Products for Vegetarian Foods and Other Foods*--Reportedly, Taiwan has 2 million vegetarians. The annual vegetarian food market is valued at approximately $156 million. Traditionally most vegetarian restaurants were linked to Buddhism; however, recently, many new vegetarian restaurants are opening up that are western style or Japanese style establishments. Food processing for the vegetarian market is no longer a niche market. Recently, one of Taiwan's premier food processing companies invested $6 million in a plant to produce texturized soy protein meat substitutes. Consequently, food ingredients for texturized soy protein foods are forecasted to increase. In 1997, Taiwan imported some 3,000 mt of soy flour, soy protein concentrate, and soy isolate, valued at $4 million. The United States accounts for 55% of these imports. The United States is the leading supplier of soy flour and soy protein concentrate, but faces stiff competition from Italy for soy isolates. Soy isolate is utilized not only in meat

substitutes, but also in wide range of food products as an emulsifier, to improve the product texture, and/or to retain water/moisture.

**Food Ingredients for Liquor Production*--At the present time, liquor production remains prohibited due to the Tobacco and Wine Monopoly. However, this ban is expected to be lifted once the Legislative Yuan gives its final approval to the Tobacco and Wine Management Law. The legislation passed the Legislative Yuan's first reading in December 1998, and is awaiting final approval. Once the ban is lifted, imports of food ingredients and flavorings for liquor production are expected to be vigorous.

* *Sugar and Sweeteners*--Taiwan consumes approximately 500,000 mt of sugar, of which approximately 60% is used in food processing. Since sugar production in Taiwan is a monopoly, sugar and sweetener prices have been kept artificially high, adversely affecting the global competitiveness of the local confectionary, bakery, and beverage sectors. In preparation for Taiwan's accession to the WTO, and to increase its competitiveness in the world market, Taiwan recently decided to gradually lower sugar prices by cutting domestic sugar production and increasing sugar and sweetener imports. This should give a boost to local food processors, who hopefully will increase their imports of all food ingredients.

Nutra-ceuticals*--Trade contacts claim the following products are locally recognized for certain properties:** Tea extract "*catechins*" in tea or carbonated beverages, because catechins reportedly inhibit oxidation reactions in food, and it can reduce serum cholesterol. Oat products, oat meal or bran, which contain the soluble fiber " *$-glucan*". Soy protein which consists of "*Isoflavones*". *"-carotine* as a natural color additive and anticarcinogen. Currently, it is most frequently used in soft drinks. Besides the above mentioned products, *flaxseeds, cranberries, tomatoes, garlics, citrus fruits, cruciferous vegetables* (broccoli, cauliflower, cabbages etc.) appear to have good market potential as ingredients in functional foods or prepared foods. With respect to minerals: calcium, iron, and zinc are often used to fortified foods and beverage, where as vitamins A, B group, C, E, and D are the most common in vitamin fortified foods, oils, and beverages. T-3 polyunsaturated fatty acids from fish oils, DHA & PHA, are popular on Taiwan, too. It is used in prepared foods and also sold as a capsule. *Bifidus* for use in yogurt drinks and soft drinks also has market potential.

Competition

According to trade sources, Taiwan's demand for high value food ingredients is almost entirely met by imports. Approximately 50% of all food ingredient imports come from Japan, 30% from the EU, and 20% from the United States. The United States is the dominant supplier of most food and agricultural product imports to Taiwan, but is not yet a key supplier for the food ingredients market. Due to Taiwan's progressive liberalization of its import policies, competition is expected to become even keener. However, Taiwanese food processors welcome new technology and new ideas for products and the U.S. is on the cutting edge for high tech food ingredients.

Selling to Taiwan Food Processing Companies

U.S. suppliers should seriously consider having an import agent or U.S. export agent physically located on Taiwan. These agents provide the following benefits:

- They know the market demand for food ingredients in terms of quantity and quality, and can provide local food processors better assurances that supplies will be reliably delivered.

- They can provide technical assistance and recipes. They also have experience with local tastes and thus can help food processors develop more appropriate food and beverage formulas. Their physical presence also is invaluable in seeing that the processor does not substitute ingredients once the product formulation is finished and the food/beverage is launched into the market. It is important to work closely with local food processors from the very beginning of the research and development stages of creating a new food/beverage product.

- They can provide food ingredient samples to local food processors for test runs and provide vital market intelligence to U.S. food ingredient suppliers for follow-up.

- Personal relationships are an important component of doing business in Taiwan.

Import Policies/Requirements

Currently, there are 194 food and agricultural items that are subject to mandatory import inspections. To check whether your food ingredient is subject to a physical inspection, you should contact the Bureau of Standards, Metrology and Inspection (BSMI) (Website until March 1999: www.bciq.gov.tw; as of March 1999: www.bsmi.gov.tw). The inspection process is supposed to take no more than 6 working days. Sampling sizes are 600 grams for solids, 1,000 ml for liquids. All import inspections are conducted in accordance with the *Law Governing Food Sanitation*.

An import license, issued by the Department of Health (DOH), is required for importing food additives. The additive must appear on the list of approximately 200 items that have been approved for use in Taiwan. According to a proposed amendment to the *Law Governing Food Sanitation* of Taiwan, the requirement of an import license for all imported food additives will be be relaxed to include a list of only 60 food additives. The new policy will benefit most food flavorings. The proposed amendment passed the Executive Yuan in December 1998, and is awaiting approval of the Legislative Yuan. U.S. exporters seeking more information about whether their product is on the approved list should contact the following Taiwan authority:

Bureau of Food Sanitation
Department of Health
12F, 102, AiKuo E. Rd., Taipei, Taiwan
Tel: 886-2-2321-0155; Fax: 886-2-2392-9723

In December 1998, the Legislative Yuan passed new regulations governing functional foods. These new regulations are scheduled to go into effect in July 1999. Any food product which makes a functional food claim will have to obtain a permit from the DOH. The DOH will issue the functional food product permit based on scientific evidence. Local food importers undoubtedly will request supporting evidence from U.S. companies seeking to make these claims. Although this may be a time consuming process, trade contacts claim the rewards are expected to be substantial.

List of Importers/Food Processors/Industry Associations

Shao-fu Hung, Manager (organic wheat milling)
Chia Fa Enterprises Co., Ltd.
25, Lane 55, KuangHwa rd., Ching Shui,
Taichung Hsien, Taiwan

Huang-Ming Sue (soy protein importer)
Asia Specialty Ingredients Inc.
Tel: 886-2-2831-9864 Fax: 886-2-2832-4419

Chii-feng Hsieh, General Manager
Hung-Yang Foods Co., Ltd. (vegetable textured meat)
Tel: 886-5-783-2737 Fax: 886-5-782-3019

J.C. Fan, General Manager (vegetable textured meat)
Stentor/Stentorian Co., Ltd.
Tel: 886-3-471-9153 Fax: 886-3-471-9379

Han-Yeh Wang, Associate General Manager (vegetable textured meat)
Fuhsow Ind. Co., Ltd.
Tel: 886-2-2393-2241 Fax: 886-2-2393-3839

Hua-Yuang Lee, Director (General foods & beverages processor)
Central R&D Institute
President Enterprises Co.
301 Chung Cheng Rd. Yan Harng, Yeong Kang Shih, Tainan Hsien, Taiwan
Tel: 886-6-253-2121 ext. 6556 Fax: 886-6-253-1314

Michael Su, General Manager of the Business Group
WeiChuan Foods Corporation (general foods & beverages processor)
25F/100, Hsin Tai 5th Rd. Sec. 1, Hsi Chih, Taipei Hsien, Taiwan
Tel: 886-2-2696-8388 ext. 3000 Fax: 886-2-2696-7857

Meighen Lan, Project Manager
I-Mei Foods Corporation (general foods & beverages processor)
10F/88, Hsin Yi Rd. Sec. 2, Taipei, Taiwan
Tel: 886-2-2351-9211 Fax: 886-2-2341-5411

Chu-Ken Lu, Director
Products Development
Taiwan Sugar Corporation (general foods & beverages processor)
266 Chien Kuo S. Rd. Sec. 1, Taipei
Tel: 886-2-2326-1815 Fax: 886-2-2703-5257

Fun-Ya Lee, Product Development Manager
Taisun Enterprise Co. (Canned foods & beverages processor)
10F/101 Chang An E. Rd. Sec. 2, Taipei, Taiwan
Tel: 886-2-2501-3253 Fax: 886-2-2501-4299

Jesse Ko, President
Chu Shui Che Foods MFG. Co. (Bakery & confectionary processor)
80 Jen Ai Rd. Sec. 2, Taipei, Taiwan
Tel: 886-2-2321-6363 Fax: 886-2-2321-2611

George Wu, General Manager for Taiwan & China Operations
Cerebos Taiwan (chicken essence)
Rm. 8, 16F/216 Tung Hwa S. Rd., Taipei, Taiwan
Tel: 886-2-2377-5111 Fax: 886-2-2377-1999

Charles Tsai, assistant General Manager
International Business Div.
Tsin Tsin Corporation (beverages)
15F/11 Chung Shan N. Rd. Sec. 1, Taipei, Taiwan
Tel: 886-2-2511-8468 Fax: 886-2-2581-9277

Zhao-Jian Chen, Secretary General
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7F/170 Min Sheng E. Rd., Sec. 2, Taipei, Taiwan
Tel: 886-2-2502-2666 Fax: 886-2-2502-2667

Zhao-Yang Chen, Secretary General
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9F-1/390 Fu Shing S.Rd Sec. 1, Taipei, Taiwan
Tel: 886-2-2704-1662 Fax: 886-2-2708-4429

Huo-Cheng He, Secretary General
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4F/27 Chang An E. Rd., Sec. 1, Taipei, Taiwan
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Tel: 886-7-241-2053 Fax: 886-7-241-2055

Ming-Chung Hsu, Secretary General
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184 San Yuan Street, Taipei
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