

# FMCG MONITOR

An integrated view of Indonesia FMCG market



FEBRUARY  
2016

# EXECUTIVE SUMMARY



1

Compared to January 2016, ID inflation in February 2016 increased from 4.14 to 4.42%.  
The average rate for USD 1 is Rp 13,583- in February 2016



2

FMCG still shows no sign of recovery in February. Consumers still hold their consumption.



3

Consumers started to realize that healthy body is everything, and as a result, healthy categories like yoghurt drink is currently enjoying the ride.



4

Both modern and traditional trade channel showed negative growth this period compared to year ago. This is surely not a good sign for a beginning of a new year.



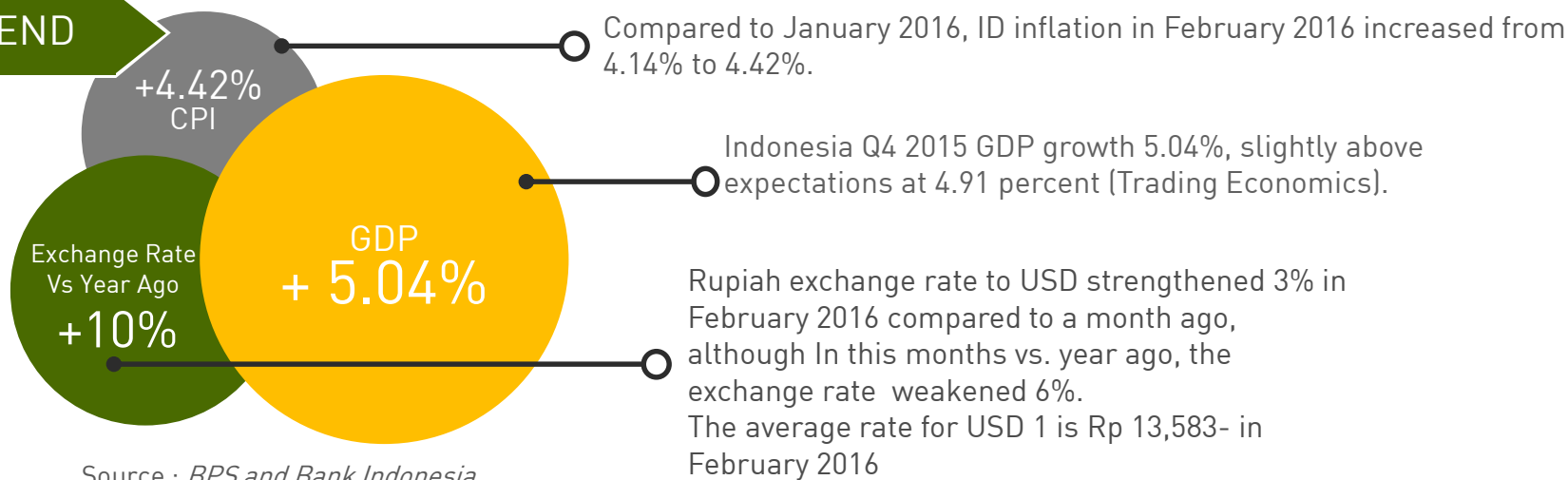
5

Some baby products are performing well this February, compared to same period a year ago. Value increase happens in most baby products. Find out more in this section

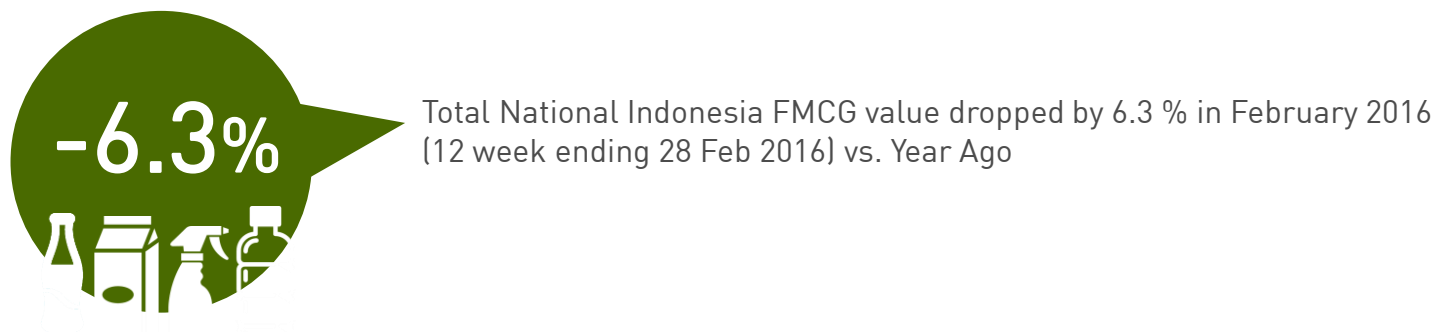


# 1 KEY INDICATOR

## MACRO TREND



## FMCG TREND



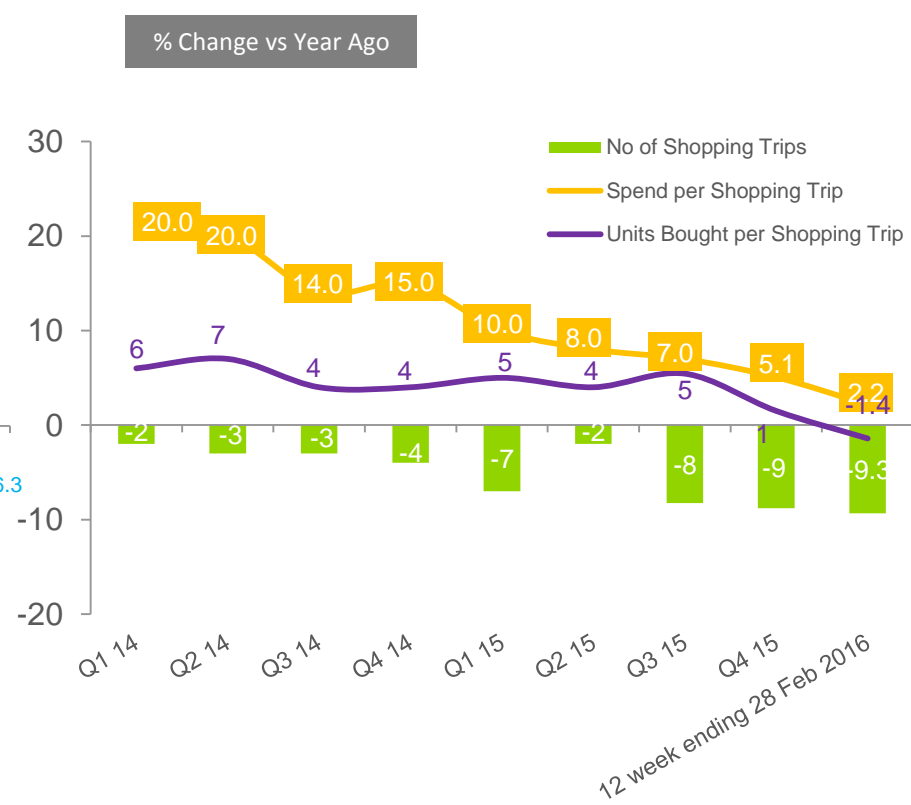
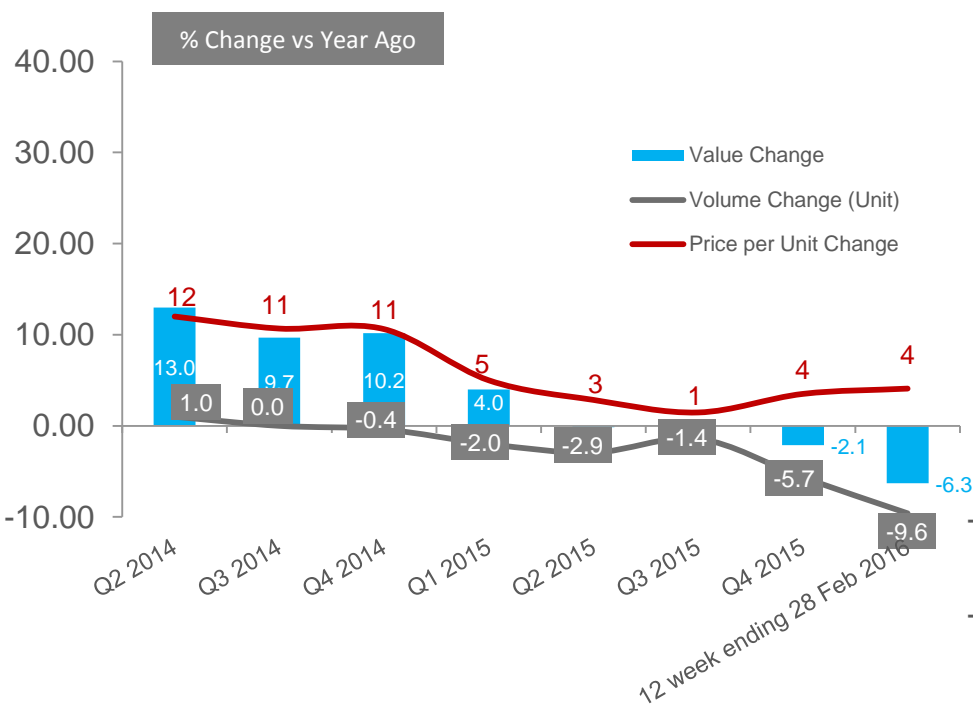
Source : Kantar Worldpanel Indonesia | Household Panel



# 2

## FMCG – 12 WEEKLY YEAR – ON – YEAR CHANGE (%)

FMCG still shows no sign of recovery in February. Consumers still hold their consumption, as can be seen by the decreasing volume (unit) spend, unit bought per shopping trip, and also the number of shopping trip.

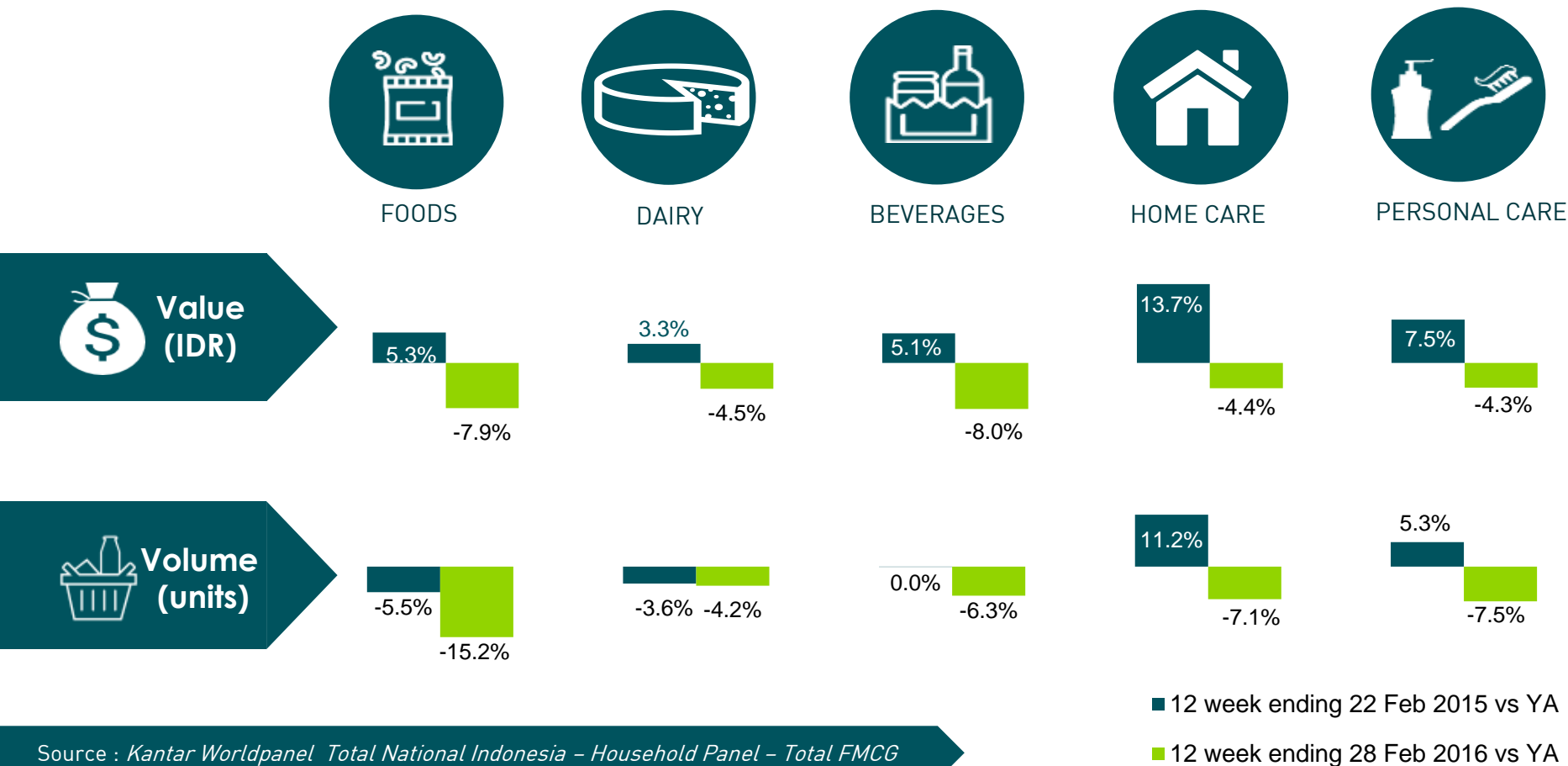


Source : Kantar Worldpanel Indonesia – Total National Indonesia – Household Panel – Total FMCG



# FMCG SEGMENTS TRENDS – VALUE AND VOLUME CHANGE (%)

The decreasing trend impacted all segments, with food still became the most impacted segment. Consumers mainly decreased their consumption for non necessity categories, in this case, light foods like chocolate, ice cream, and biscuits were impacted the most.







Yoghurt Drink

# 3 HOT CATEGORIES

NATIONAL | 12 week ending 28 Feb 2016

Consumers started to realize that healthy body is everything, and as a result, healthy categories like yoghurt drink is currently enjoying the ride. Yoghurt Drink is able to attract not only trialists to try this segment but it also able to increase its repeaters. Both trialists and repeaters contribute equally to total buyers of Yoghurt Drink



Total Volume Increase  
(Unit)  
**+55%**



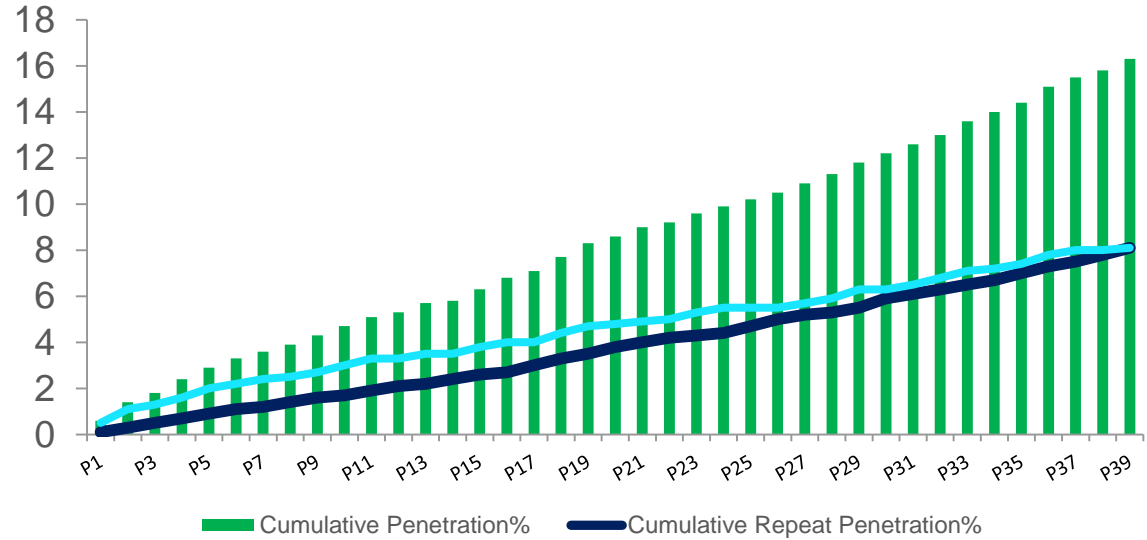
Average Volume per  
Buyer (Unit)  
**+10%**



Frequency  
**+14%**

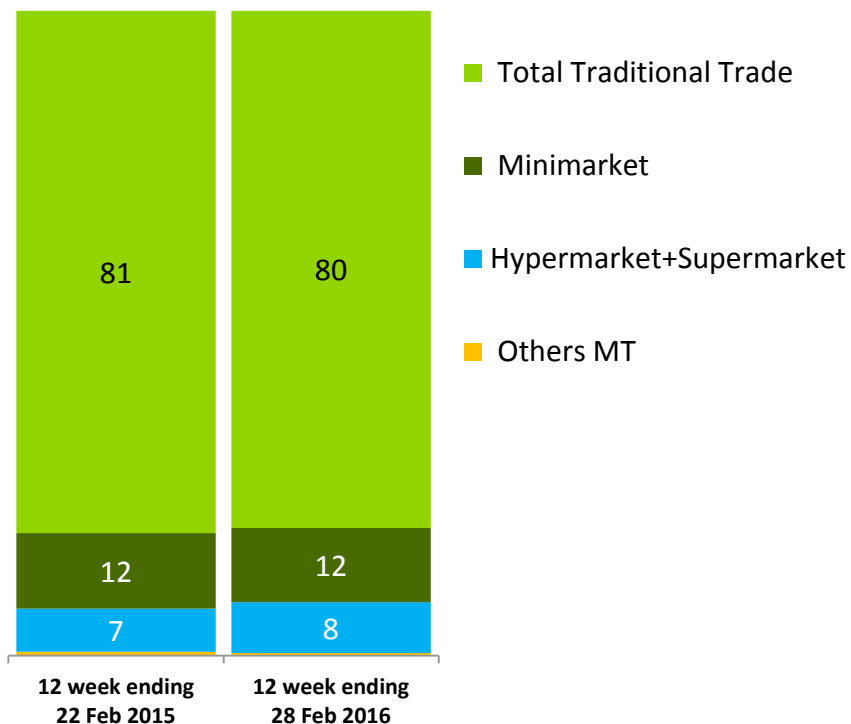
## YOGHURT DRINK | NATIONAL INDONESIA

Up Until 28<sup>th</sup> February 2016



# 4 RETAILER SNAPSHOT NATIONAL INDONESIA

## Value Share %



## Value Change % (vs Year Ago)

Value Change %	12 week ending 28 Feb 2016 vs. Year Ago
Total Modern Trade	-2.6%
Minimarket	-7.5%
Traditional Trade	-7.2%

Both modern and traditional trade channel showed negative growth this period compared to year ago. This is surely not a good sign for a beginning of a new year.

Source : Kantar Worldpanel Indonesia – Household Panel – Total FMCG

# 5 DO YOU KNOW?

Some baby products are performing well this February, compared to same period a year ago. Value increase happens in most baby products, with baby body care and baby cereal appear to be baby categories that enjoy a high increase in volume,

## BABY SHOWER GEL

Volume: +1%  
Value: +0%



## BABY SHAMPOO

Volume: +3%  
Value: +7%

## BABY CEREAL

Volume: +35%  
Value: +3%



## BABY BODY CARE

Volume: +26%  
Value: +24%





# ABOUT KANTAR WORLD PANEL

Kantar Worldpanel is the global expert in shoppers' behavior. Through continuous monitoring, advanced analytics and tailored solutions, Kantar Worldpanel inspires successful decisions by brand owners, retailers, market analysts and government organizations globally.

With over 60 years' experience, a team of 3,500, and services covering 60 countries directly or through partners, Kantar Worldpanel turns purchase behavior into competitive advantage in markets as diverse as FMCG, impulse products, fashion, baby, telecommunications and entertainment, among many others. Kantar Worldpanel is part of the Kantar, one of the world's largest insight, information and consultancy networks. Kantar is the data investment management division of WPP.

In Indonesia, Kantar Worldpanel – Inspiring Successful Decision™ tracks household purchase of over 70 different FMCG categories across food and non food from its sample of 7,000 households across urban and rural Indonesia on a weekly basis; representing around 50 million households.

For further information, please visit us at [www.kantarworldpanel.com/id](http://www.kantarworldpanel.com/id)

## CONTACT US

Kantar Worldpanel Indonesia  
Blok M Plaza 8<sup>th</sup> Floor | Jl. Bulungan No 76, 12130 | Jakarta Selatan

 [fanny.murhayati@kantarworldpanel.com](mailto:fanny.murhayati@kantarworldpanel.com)

 [dwiki.pradipto@kantarworldpanel.com](mailto:dwiki.pradipto@kantarworldpanel.com)

 [www.kantarworldpanel.com/id](http://www.kantarworldpanel.com/id)



Kantar Worldpanel Indonesia



@KWP\_ID