FMCG MONITOR

An integrated view of Indonesia FMCG market

MAY 2016

KANTAR WORLDPANEL Inspiring successful decisions

EXECUTIVE SUMMARY

1 KEY MARKET INDICATOR

Find out monthly market update in this section

2 FMCG INDICATOR

There's no organic growth in this period since FMCG source of growth is coming from price increase, and buyers still limit their shopping trip

3 RETAILERS SNAPSHOT

Minimarket able to enjoy positive value growth during this period compare to a year ago. Furthermore, traditional trade also shows positive growth

4 SEGMENT PERFORMANCE

Dairy and Beverages are experiencing slight positive growth, while Personal Care and Home Care are facing slower growth compared to last year. In the other hand, Food is facing negative growth

5 DO YOU KNOW?

Buyers still cautious on spending allocations, they tend to juggle their budget. Not just for foods, but also personal care like deodorant. How does it affect the category? Find out more here.

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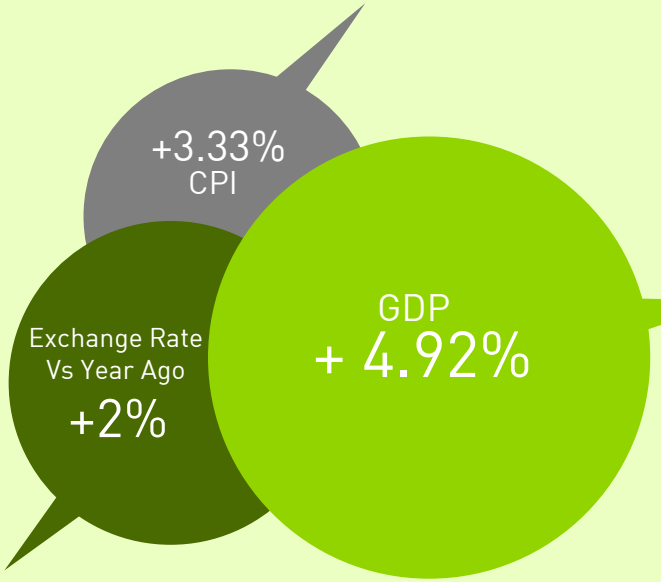
1 KEY INDICATOR

MACRO TREND

Compared to April 2016, ID inflation in May 2016 experience slight decreased from 3.60% to 3.33%.



Indonesia Q1 2016 GDP growth 4.92%, slightly above expectations at 4.91 percent (Trading Economics).

Rupiah exchange rate to USD weakened by 1.8% in May 2016 compared to a month ago. Furthermore, in this months vs. year ago, the exchange rate weakened more to 2%.
The average rate for USD 1 is Rp 13,487- in May 2016

Source : *BPS and Bank Indonesia*

FMCG TREND

Total National Indonesia FMCG value managed to grow higher in May 2016 compared to 1.8% in April 2016.

Source : *Kantar Worldpanel Indonesia | Household Panel (12 week ending 22 May 2016) vs. Year Ago*

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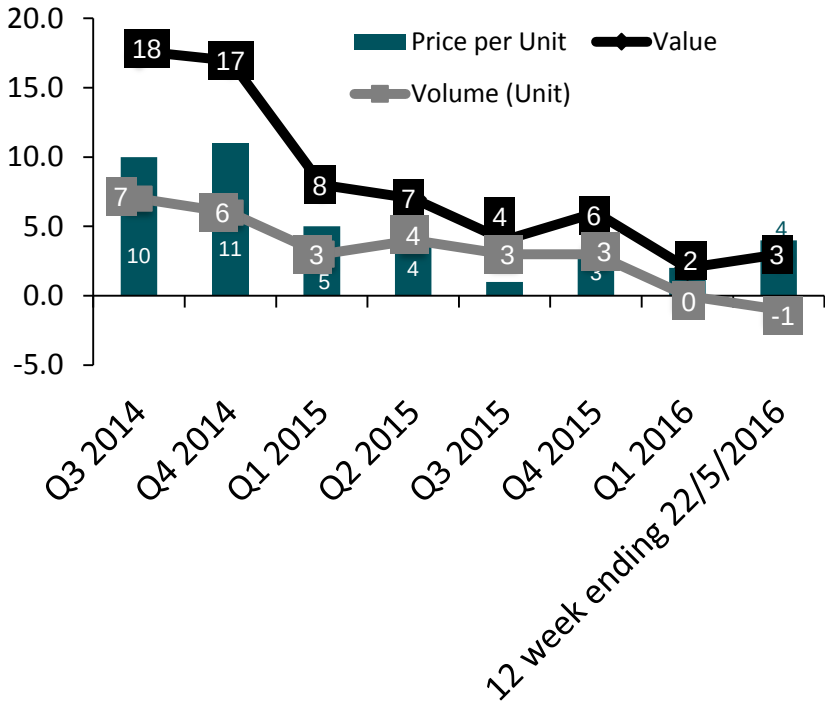
2 FMCG INDICATOR

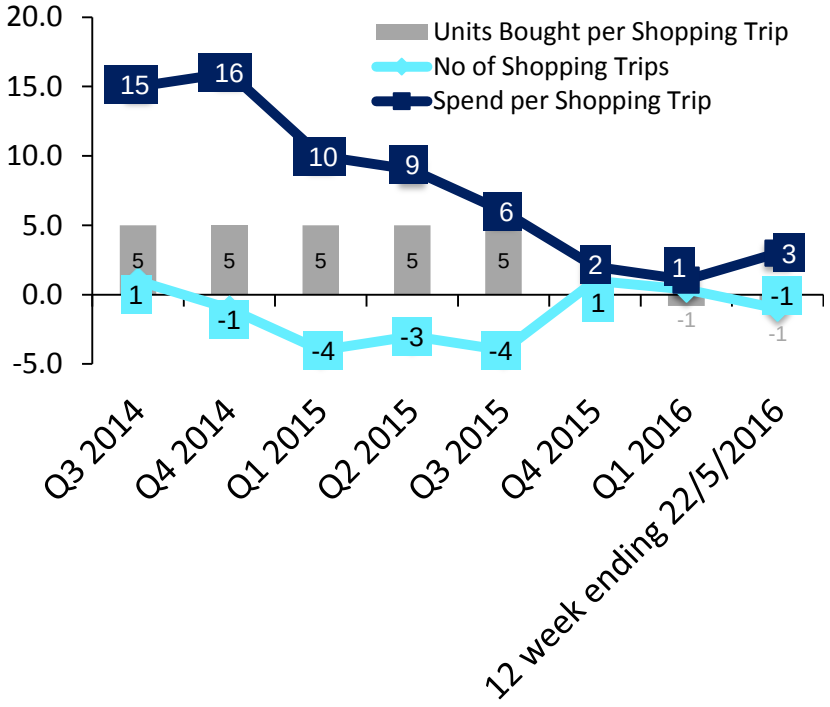
There's no organic growth in this period since FMCG source of growth is coming from price increase, and buyers still limit their shopping trip

QUARTERLY GROWTH VS YEAR AGO

VALUE VOLUME, AND PRICE



FREQUENCY, UNITS BOUGHT AND SPEND PER TRIP



P5 2016 YEARLY OUTLOOK

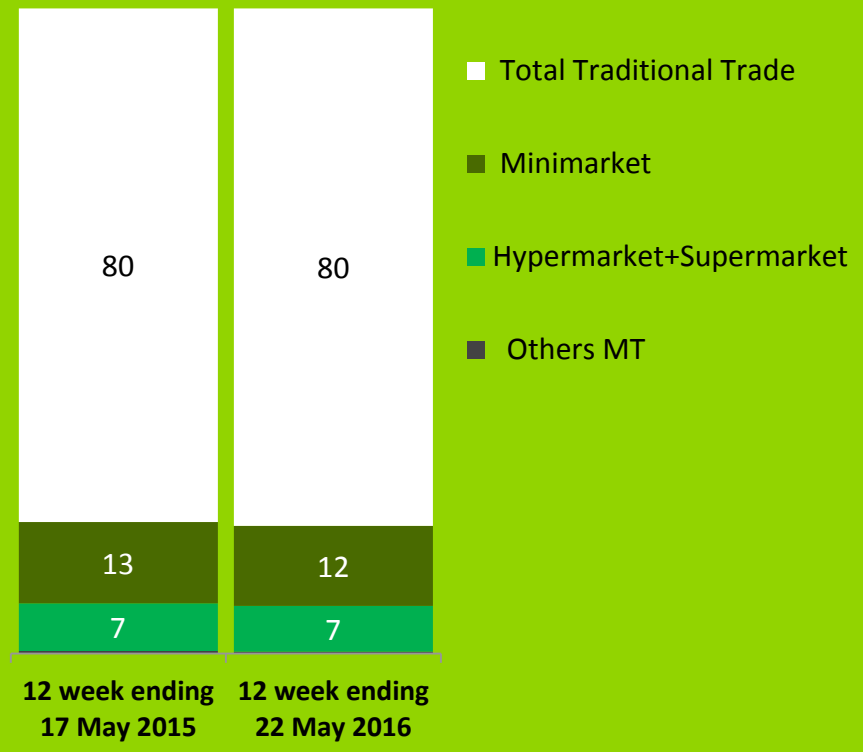
	P5 2015	P5 2016
Value %	14.1%	4.7%
Volume % (units)	5.7%	1.7%
Price per unit	8.0%	3.0%
Frequency	-1.4%	-1.3%

Yearly (52 WEEKLY) P5 2016 Data vs Year Ago

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

3 RETAILER SNAPSHOT

VALUE SHARE%



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

VALUE CHANGE%

Value Change %	12 week ending 22 May 2016 vs. Year Ago
Total Modern Trade	+0.2%
Minimarket	+2.0%
Hyper + Supermarket	-0.8%
Traditional Trade	+4.0%

Even though hyper & supermarket declined, minimarket able to enjoy positive value growth during this period compared to a year ago. Furthermore, traditional trade also shows positive growth in this period.

Indonesia National, 12 Week Ending 22 May 2016 vs YA, Total FMCG (based on monthly household expenditure)

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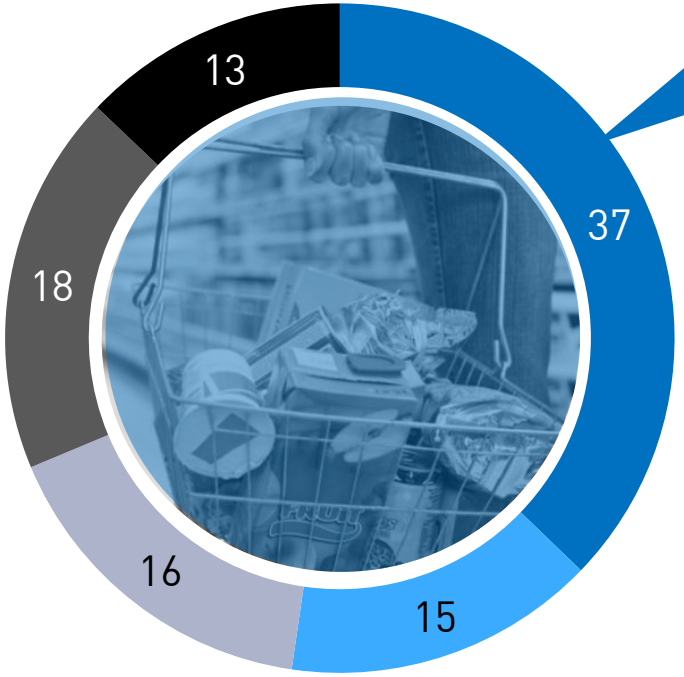
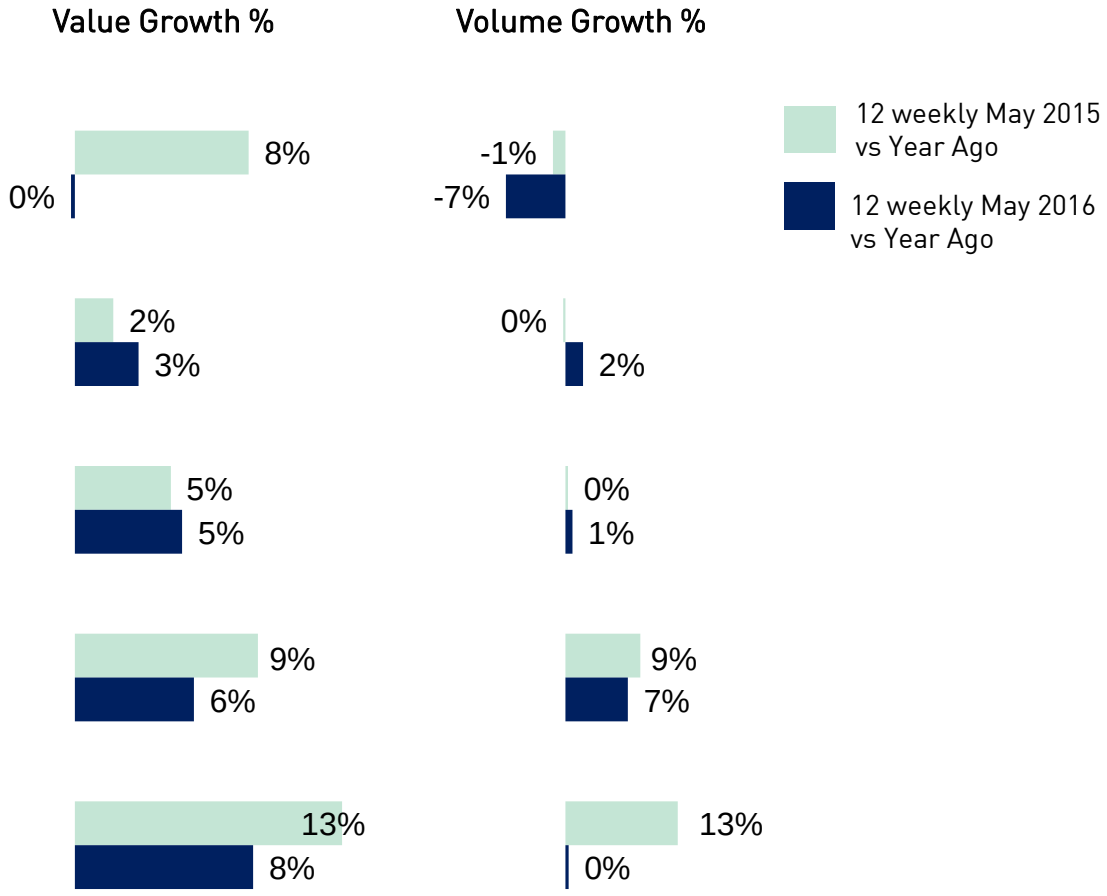
4 SEGMENT PERFORMANCE

Dairy and Beverages are experiencing slight positive growth, while Personal Care and Home Care are facing slower growth compared to last year. In the other hand, Food is facing negative growth driven mostly by light foods/snacks as buyers still hold their spending by focusing on primary categories.

Segment value % contribution





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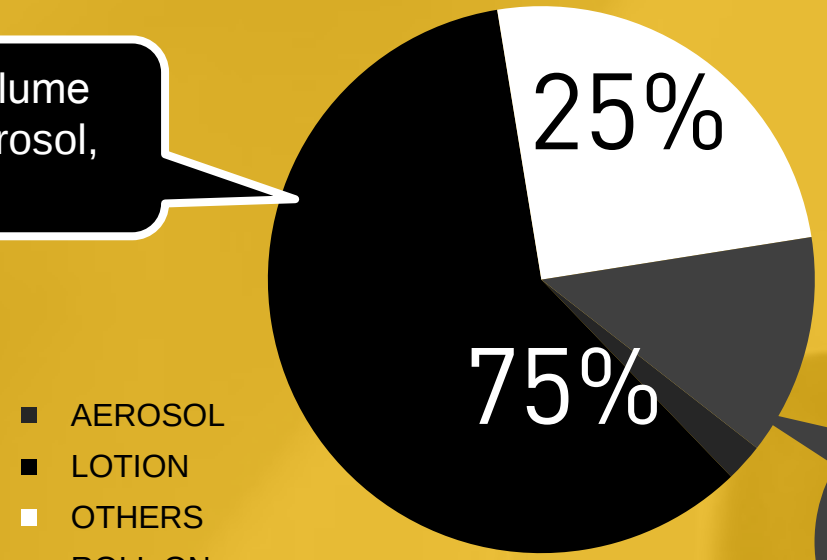
5 DO YOU KNOW?

Buyers still hold their spending, not only for foods, but also other categories, (e.g. deodorant). Buyers tend to juggle their budget with putting more affordable format into their baskets, such as Lotion and Roll On. The convenience used of this format also helps them to be chose by consumers.

75% of deodorant's volume came from Roll On, Aerosol, and Lotion



Roll On deodorant is able to gain biggest volume from the other formats.

Indonesia National, 52 Week Ending 22 May 2016 vs YA, Total Deodorant (based on monthly household expenditure)

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ABOUT KANTAR WORLDPANEL

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

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