FMCG MONITOR

An integrated view of Indonesia FMCG market

JUNE 2016

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EXECUTIVE SUMMARY

1 KEY MARKET INDICATOR

Find out monthly market update in this section

2 FMCG INDICATOR

Households are still limiting their FMCG consumption, as frequency, spending per trip, and unit bought per trip are still decreasing

3 RETAILERS SNAPSHOT

Positive growth is seen across retailers, for both modern and traditional trade.

4 SEGMENT PERFORMANCE

Value growth happened across segments this quarter, led by Personal Care, Home Care and Beverages. However, Food still hasn't recovered yet in terms of volume (units) growth.

5 DO YOU KNOW?

Modern Trade is growing driven by both Minimarket and Supermarket. They become more and more important in Indonesia. Why is it? Find out more here!

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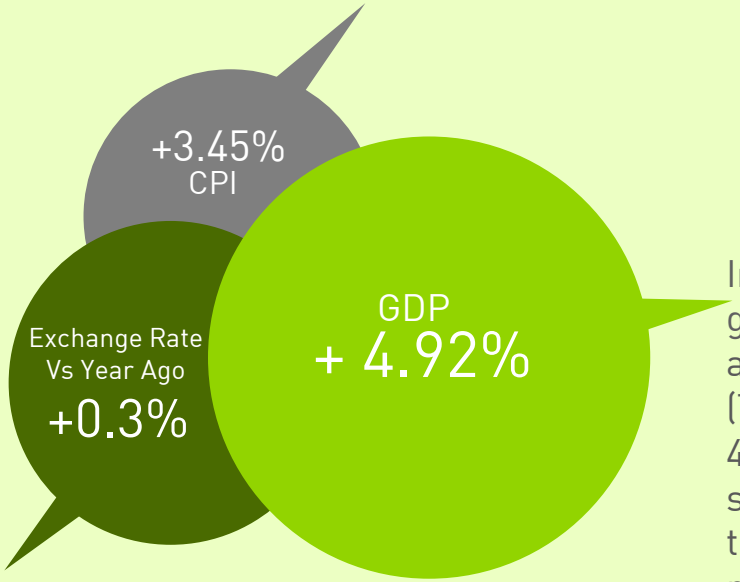
1 KEY INDICATOR

MACRO TREND

Compared to May 2016, ID inflation in June 2016 experience slight increased from 3.33% to 3.45%.



Indonesia Q1 2016 GDP growth 4.92%, slightly above expectations (Trading Economics) at 4.91 percent – Q2 GDP is still not available yet in the release of this repost.

Rupiah exchange rate to USD strengthened by 0.5% in June 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 13,422- in June 2016

Source : *BPS and Bank Indonesia*

FMCG TREND

Total National Indonesia FMCG value managed to grow 5.9% in June 2016 vs las year. Higher compared to last month's 3.3% growth.

Source : *Kantar Worldpanel Indonesia | Household Panel (12 week ending 19 June 2016) vs. Year Ago*

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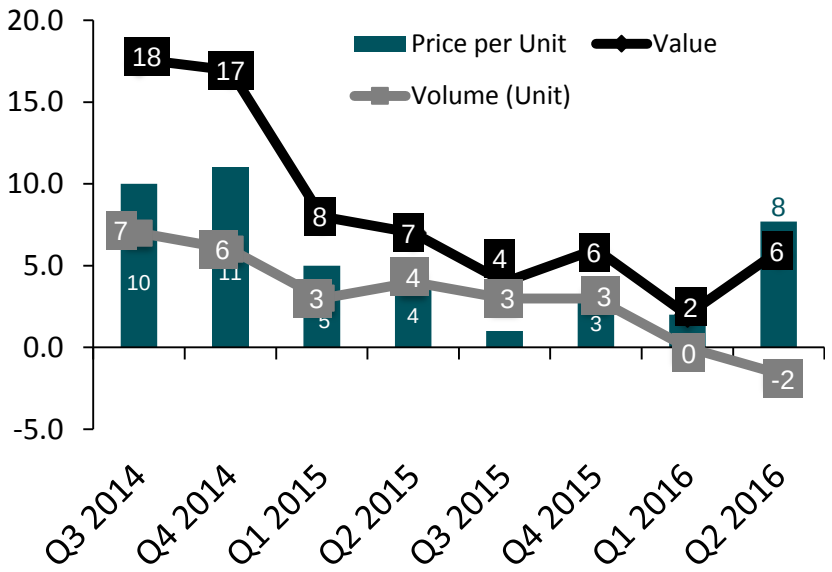
2 FMCG INDICATOR

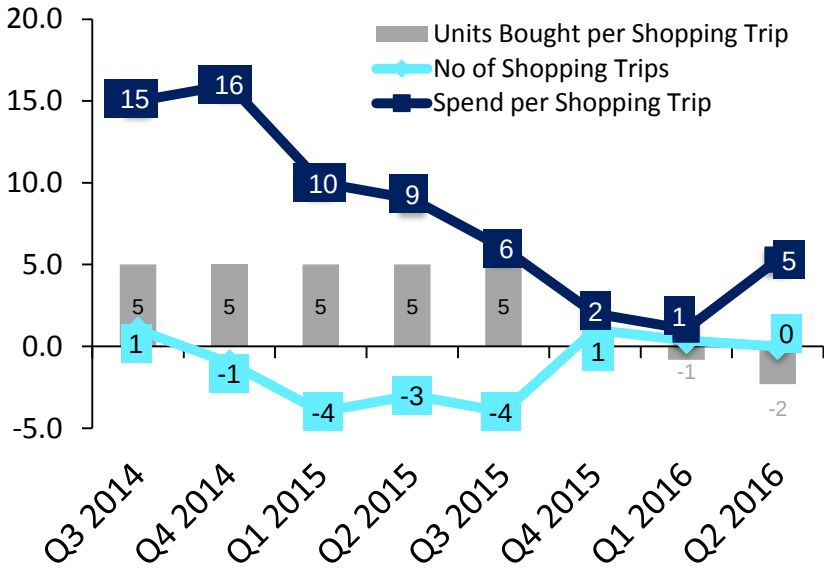
Households are still limiting their FMCG consumption, as frequency, spending per trip, and unit bought per trip are still decreasing. The value growth, however, is still driven by price increase.

QUARTERLY GROWTH VS YEAR AGO

VALUE VOLUME, AND PRICE



FREQUENCY, UNITS BOUGHT AND SPEND PER TRIP



P6 2016 YEARLY OUTLOOK

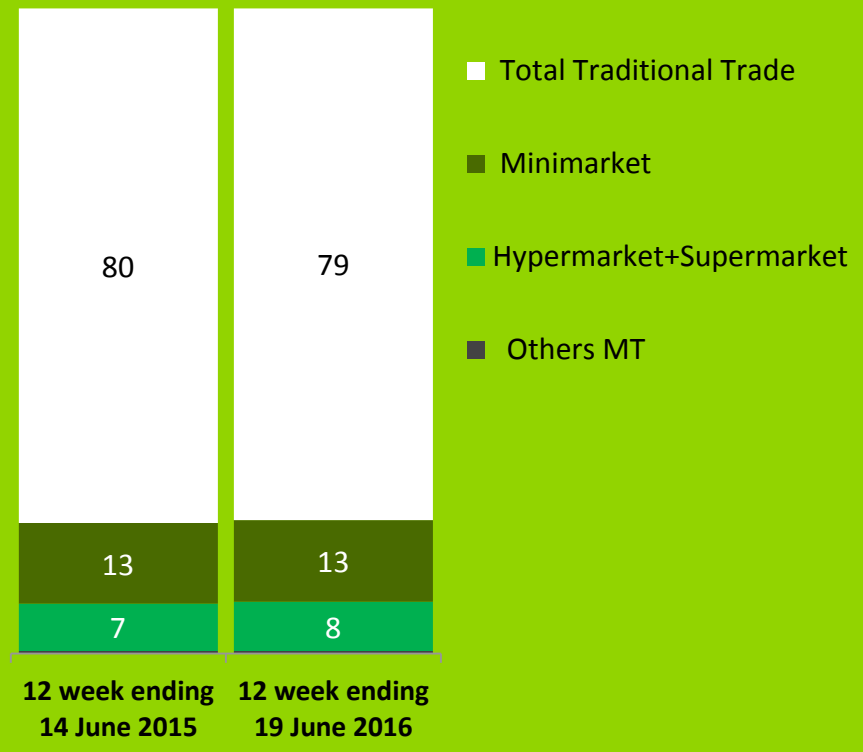
	P6 2015	P6 2016
Value %	12.9%	5.1%
Volume % (units)	5%	1.5%
Price per unit	7.4%	3.6%
Frequency	-1.9%	-0.9%

Yearly (52 WEEKLY) P6 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 19 June 2016 vs. Year Ago
Total Modern Trade	+7.8%
Minimarket	+7.6%
Hyper + Supermarket	+9.1%
Traditional Trade	+5.4%

Positive growth is seen across retailers, for both modern and traditional trade. Modern trade growth is driven by Minimarket and Supermarket growth. Traditional trade, on the other hand, is still the most important channel in Indonesia.

Indonesia National, 12 Week Ending 19 June 2016 vs YA, Total FMCG (based on monthly household expenditure)

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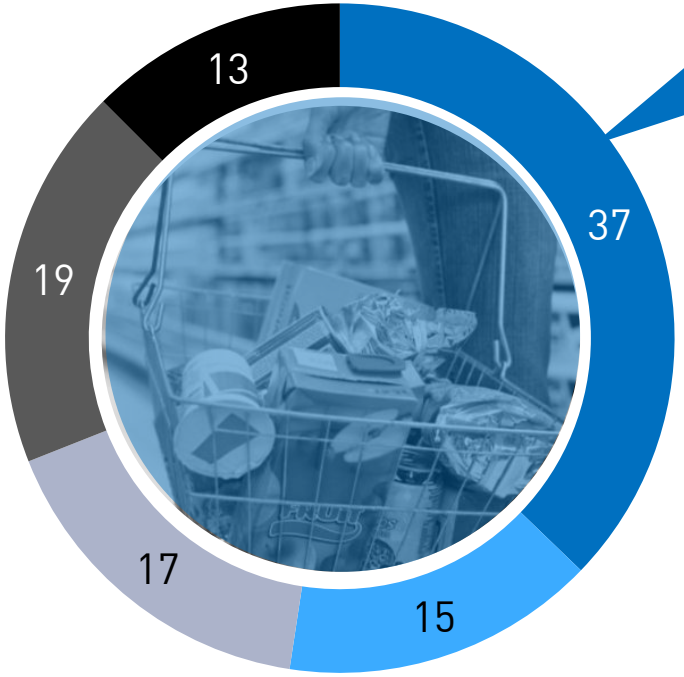
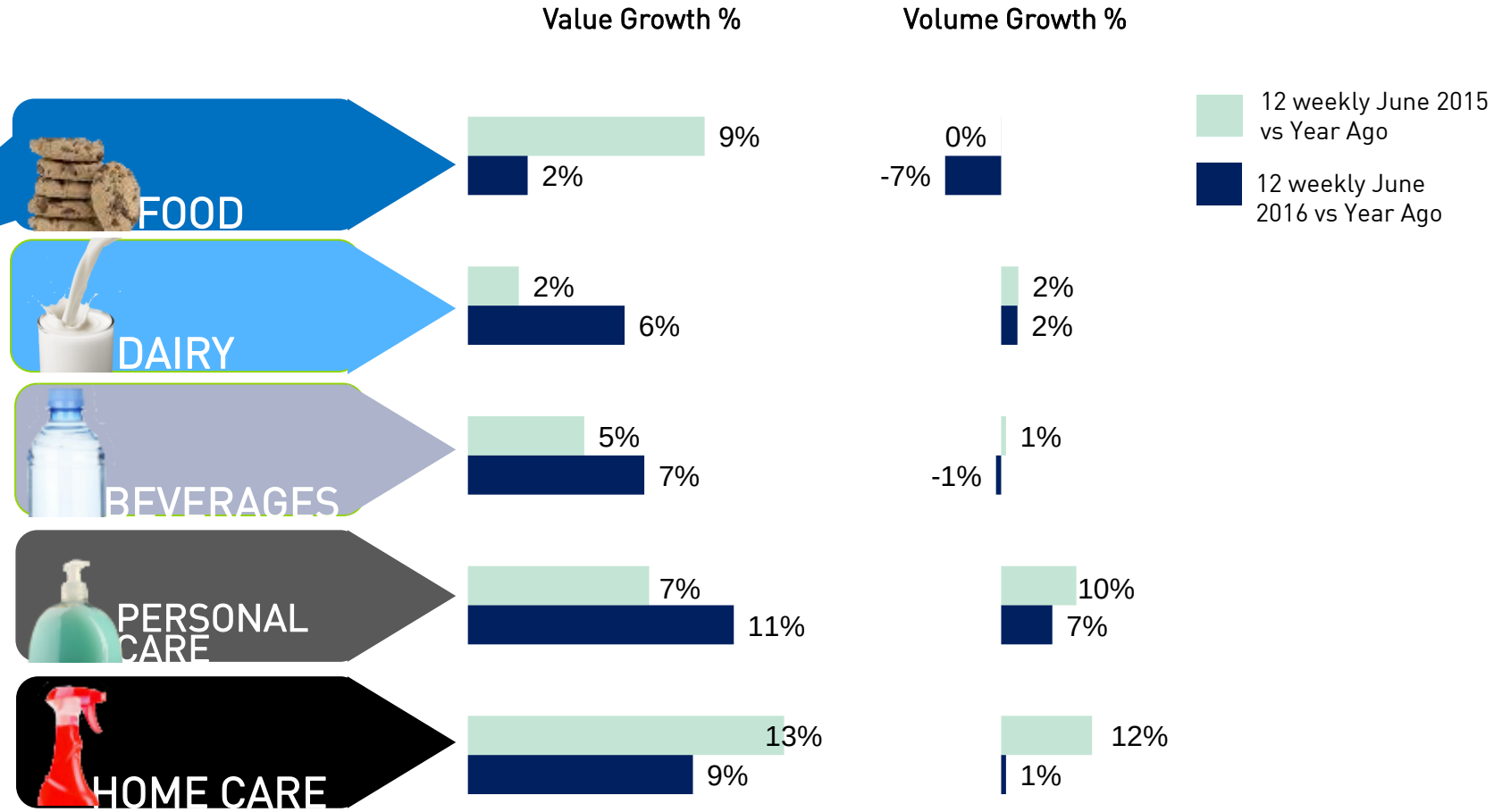
4 SEGMENT PERFORMANCE

Value growth happened across segments this quarter, led by Personal Care, Home Care and Beverages. However, Food still hasn't recovered yet in terms of volume (units) growth.

Segment value % contribution





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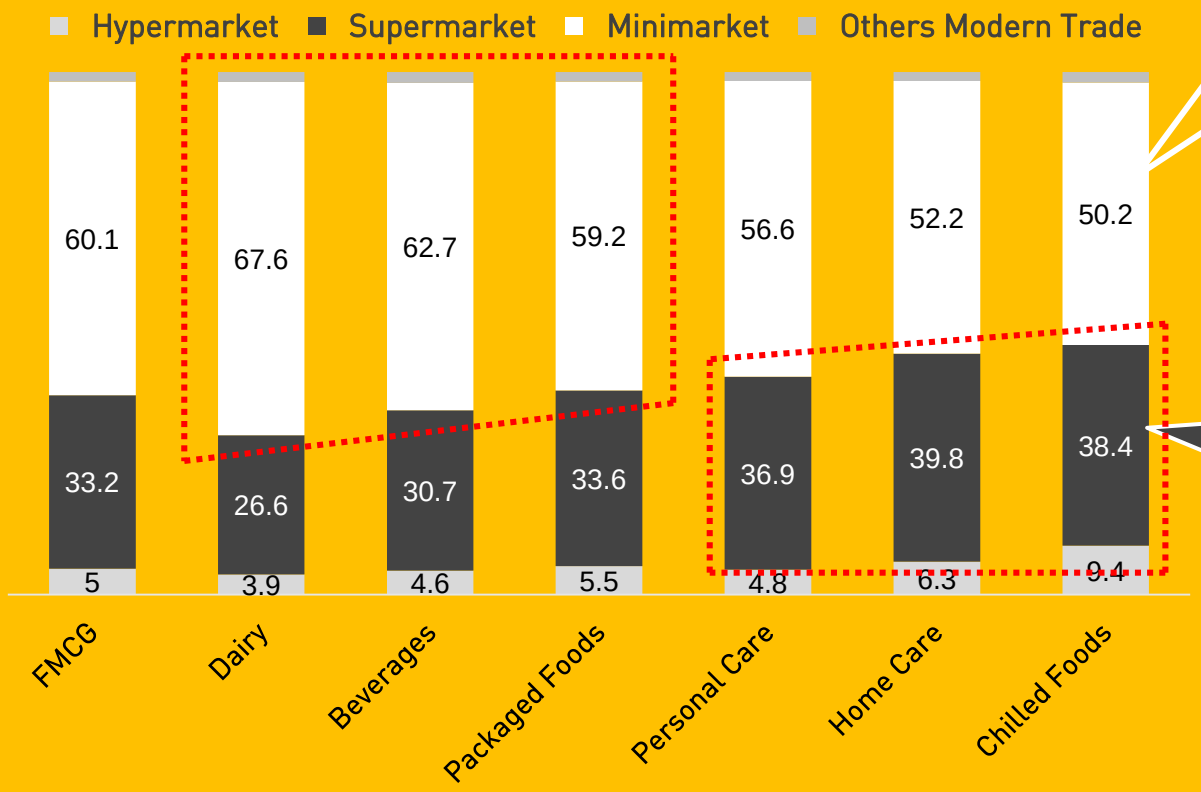
VALUE SHARE WITHIN MODERN TRADE %



- Recruited buyers the most in cooking oil and non baby biscuits categories
- Minimarkets are everywhere: Very suitable for impulse category like Ice Cream, Mineral Water and Energy Drink

- Provides wide range of products more than Minimarkets but located nearer than Hypermarket.
- It is preferable for consumers to buy Fabric Cleanser, Body Care and Dishwash in here

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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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