FMCG MONITOR

An integrated view of Indonesia FMCG market

AUGUST 2016

KANTAR WORLDPANEL

EXECUTIVE SUMMARY

1 KEY MARKET INDICATOR

Find out monthly market update in this section

2 FMCG INDICATOR

While the spending increase are still driven by the price increase, there is a sign of recovery as the volume (Unit) bought per household is registering a positive trend.

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.

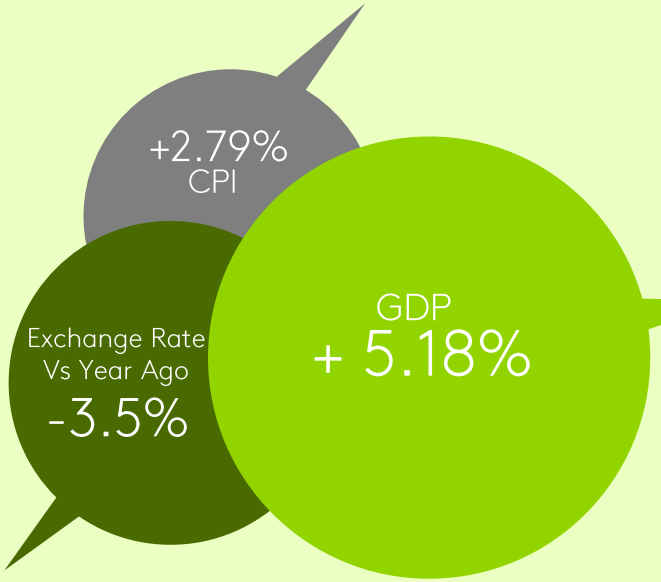
5 DO YOU KNOW?

What interesting thing can we know from Out of Home panel data? Many things, of course. To answer this question, we dig up our Out of Home panel data and found some.

1 KEY INDICATOR

MACRO TREND

Compared to Jul 2016, ID inflation in August 2016 experience slight decreased from 3.21% to 2.79%.



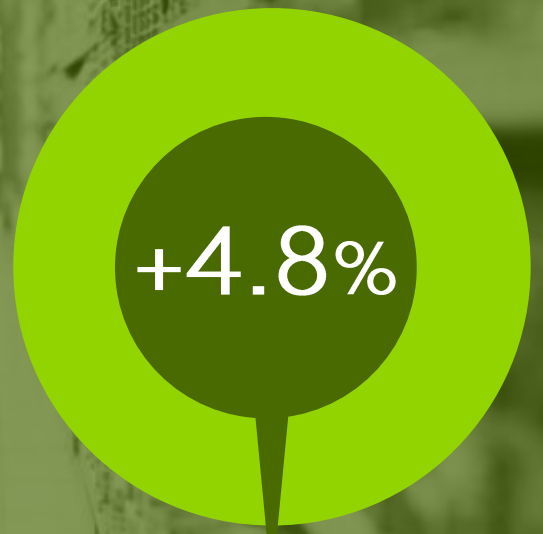
Indonesia Q2 2016 GDP growth is 5.18%, slightly above expectations (Trading Economics) at 4.9 percent

Rupiah exchange rate to USD weakened by 0.4% in Aug 2016 compared to a month ago. However, in this months vs. year ago, the exchange rate strenghten to 3.5%.
The average rate for USD 1 is Rp 13,290- in Aug 2016

Source : *BPS and Bank Indonesia*

FMCG TREND

FMCG AUGUST 2016
ANNUAL GROWTH



Total National Indonesia FMCG value managed to grow 4.8% in Aug 2016 vs last year. Higher compared to last month's 4.5% growth.

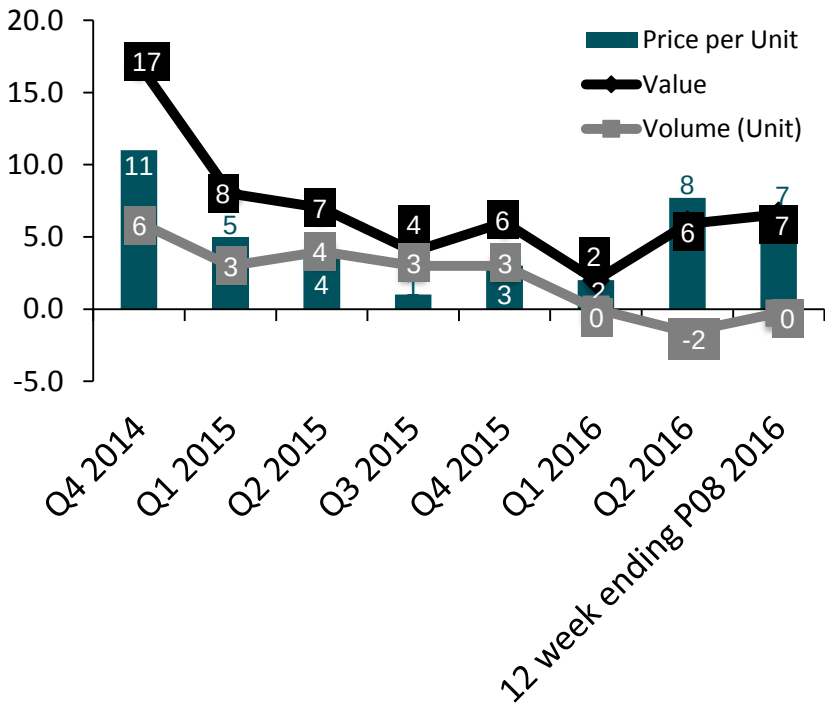
Source : *Kantar Worldpanel Indonesia | Household Panel (52 week ending 14 Aug 2016) vs. Year Ago*

2 FMCG INDICATOR

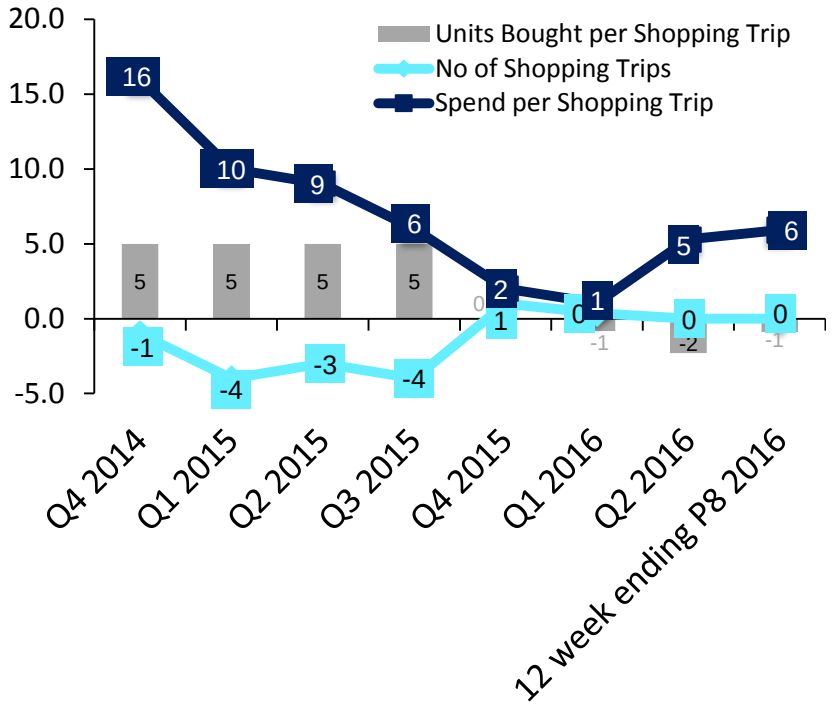
While the spending increase are still driven by the price increase, there is a sign of recovery as the volume (Unit) bought per household is registering a positive trend.

QUARTERLY GROWTH VS YEAR AGO

VALUE VOLUME, AND PRICE



FREQUENCY, UNITS BOUGHT AND SPEND PER TRIP



AUGUST 2016 YEARLY OUTLOOK

	AUG 2015	AUG 2016
Value %	10.7%	4.8%
Volume % (units)	4.3%	0.7%
Price per unit	6.1%	4.1%
Frequency	-1.9%	-0.9%

Yearly (52 WEEKLY) P8 2016 Data vs Year Ago

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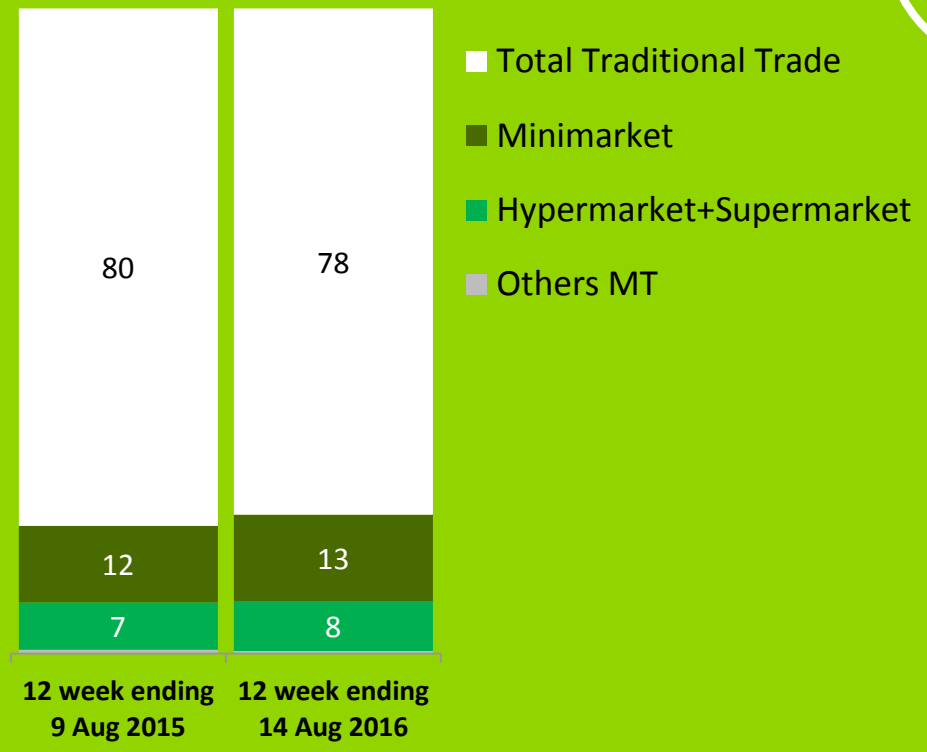
Source : *Kantar Worldpanel Indonesia – Total National Indonesia - Household Panel – Total FMCG*

3 RETAILER SNAPSHOT

VALUE SHARE%



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

VALUE CHANGE%

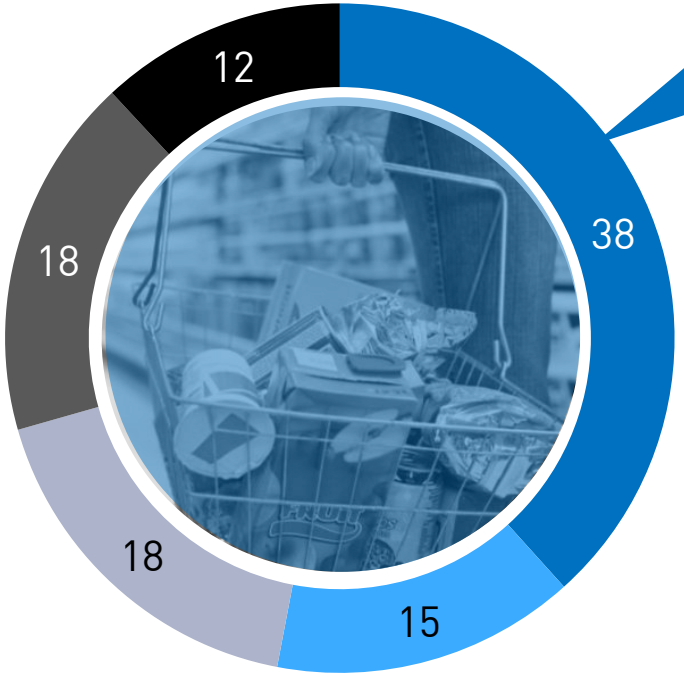
Value Change %	12 week ending 14 Aug 2016 vs. Year Ago
Total Modern Trade	+15.9%
Minimarket	+20.6%
Hyper + Supermarket	+11.9%
Traditional Trade	+4.2%

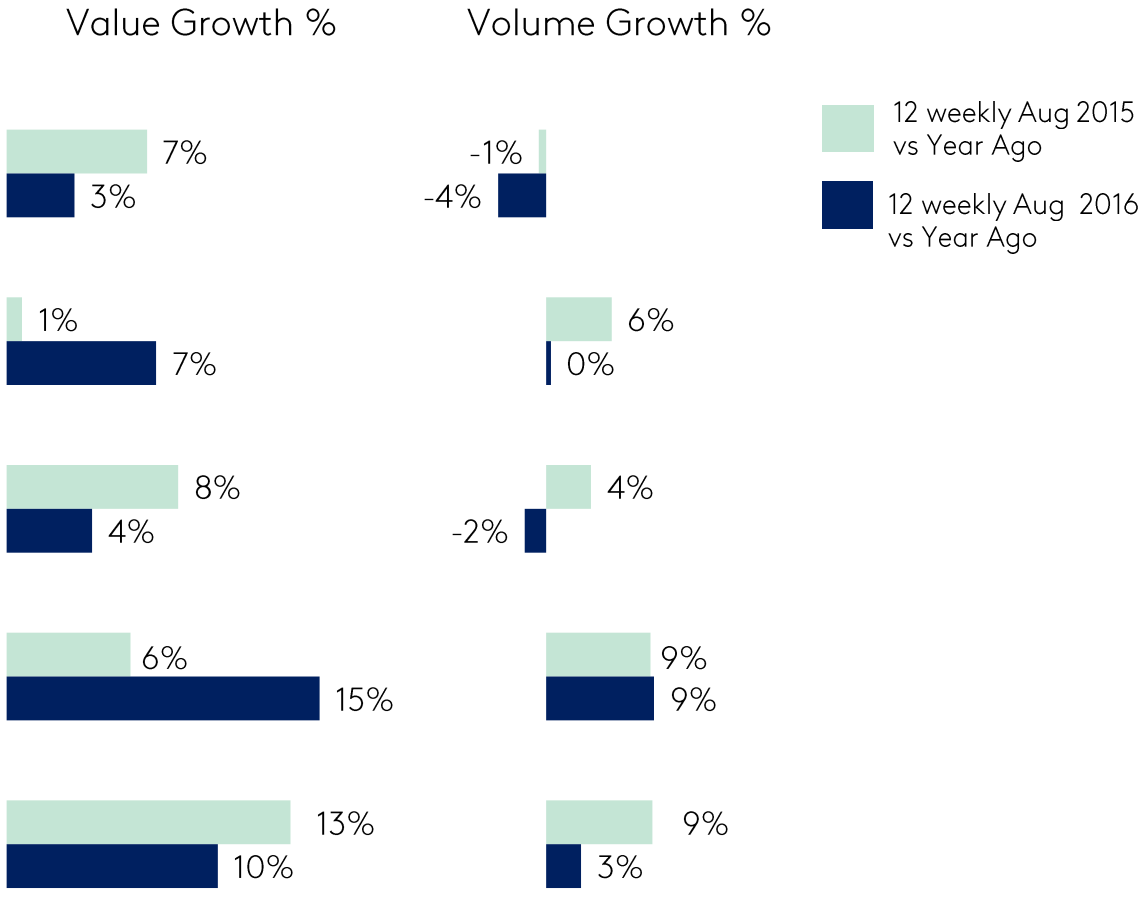
Both Traditional Trade & modern trade shows positive growth in August. Between both, faster growth is shown by Modern Trade. But still, traditional trade remains the most important channel in the country.

4 SEGMENT PERFORMANCE

Value growth happens across segments this August, Personal Care & Dairy even grow faster than last year. However, Food and beverages are still slowing down in terms of volume (units) growth, though the value is still growing.

Segment value % contribution





Indonesia National, 12 Week Ending 14 Aug 2016 vs YA, Total FMCG

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5 DO YOU KNOW?

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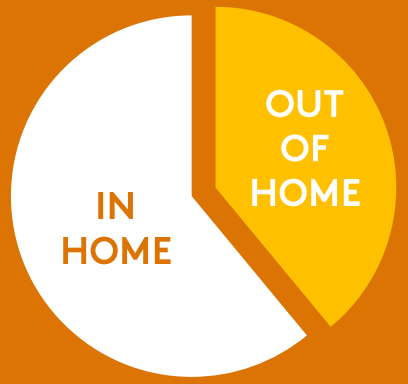
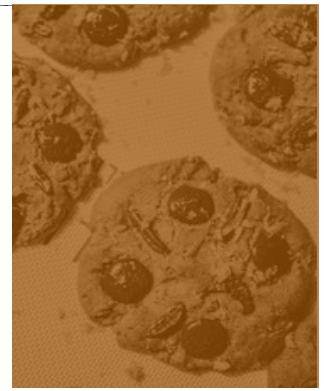
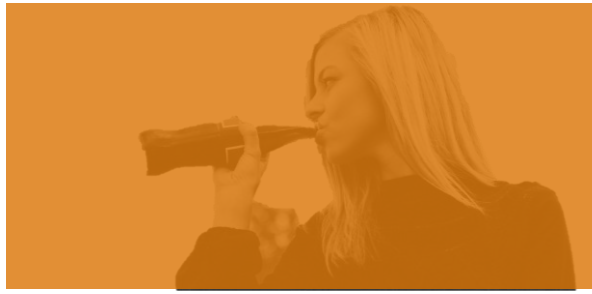


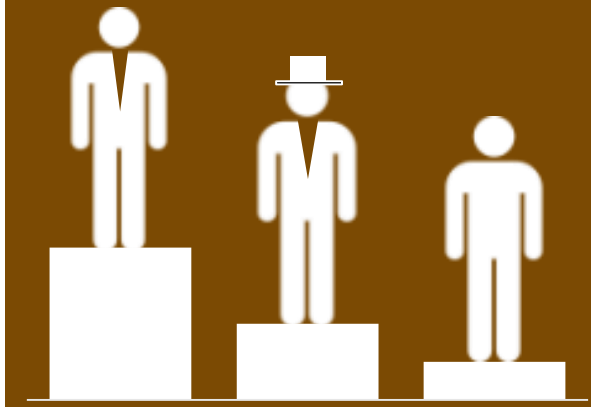
Volume wise, OOH contributes **39%** for Total FMCG*

Carbonated Soft Drink is the category that has the **highest OOH consumption share** among other categories with more than 50% share**

Consumers are keen to consume **Chewing Gums and Potato Snacks** Out of their homes! Both categories OOH shares are increasing, 9 points for chewing gum & 2 points for potato snacks.







Middle Class consumers are the most who love consuming FMCG out of home, as they contribute the highest OOH volume (43%, in unit)

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Indonesia Urban, 52 Week Ending 14 Aug 2016

*)camparison to categories with OOH consumption. Volume is in unit

**) in home vs out of home volume share

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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