FMCG MONITOR

An integrated view of Indonesia FMCG market

Feb

2014

#Data up to P01 2014

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executive SUMMARY

1

The consumer price index advanced **7.75 percent last month, year on year**. Indonesia's inflation was at its slowest pace in eight months in February, as food prices declined.

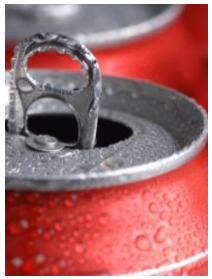
Gross domestic product rose 5.78 percent in 2013, after a 6.23 percent increase in 2012 and marking **the slowest growth since 2009**.

2

Indonesia's FMCG growth is still slowing down in January 2014. Price is still stable even though the inflation remains high.

Zoom into segment level, Personal Care growth is still at peak, followed by positive growth of Beverages and Dairy.

3



Carbonated Soft Drink (CSD) shows excellent growth in Urban. The incremental in number of buyer is **driven by a "relatively new" brand in CSD market that launched in 2011**

This buyer incremental successfully lifted the total volume per household of CSD by 17%.

4

Traditional Trade increased by nearly two digits this January vs. year ago in Urban. This suggests that the influence of Traditional Trade in urban is still strong.

Hyper and Supermarket also showed positive growth in Urban, on par with the growth of Traditional Trade.

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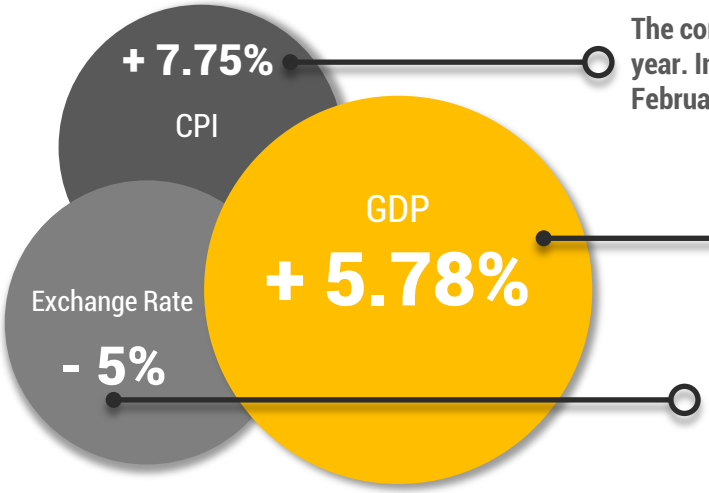
KEY INDICATOR

Macro Trend



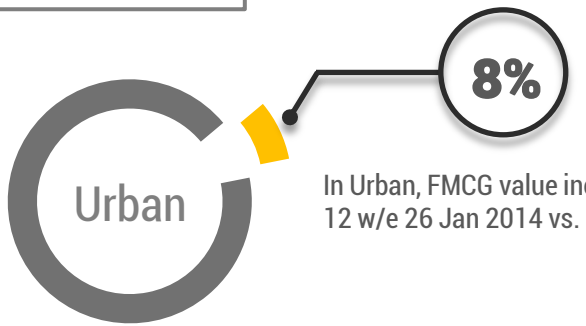
The consumer price index advanced 7.75 percent last month, year on year. Indonesia's inflation was at its slowest pace in eight months in February, as food prices declined.

Gross domestic product rose 5.78 percent in 2013, after a 6.23 percent increase in 2012 and marking the slowest growth since 2009.

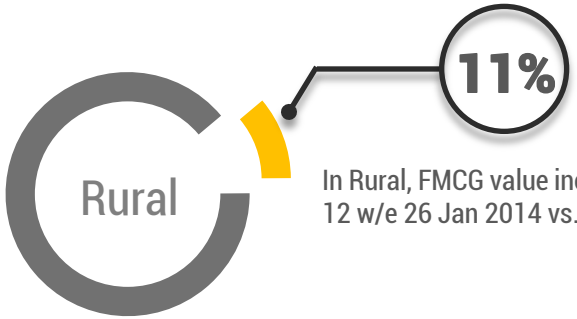
Rupiah exchange rate to USD strengthened to 5% in February 2014 vs. January 2014. The exchange rate weakened by 21% in this month vs. YA

Source : *BPS and Bank Indonesia*

FMCG Trend



In Urban, FMCG value increased 8% in 12 w/e 26 Jan 2014 vs. YA



In Rural, FMCG value increased 13% in 12 w/e 26 Jan 2014 vs. YA

Source : *Kantar Worldpanel Indonesia | Household Panel*

*FMCG is excluding rice, sugar, and fresh food

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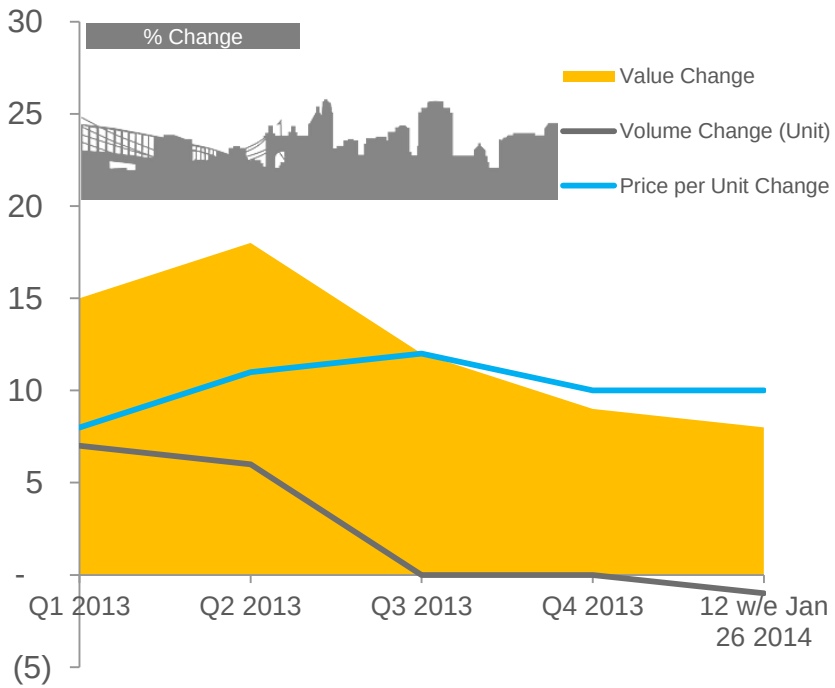
1

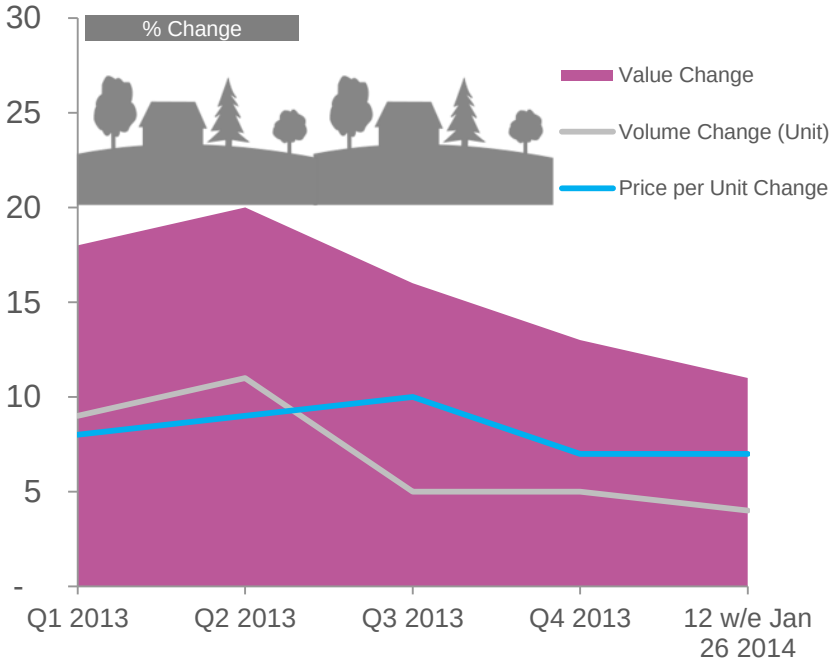
FMCG – 12 WEEKLY YEAR – ON – YEAR CHANGE (%)

Indonesia's FMCG growth is still slowing down in January 2014. Price is still stable even though the inflation remains high.

Urban



Rural



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

*FMCG is excluding rice, sugar, and fresh food

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2 FMCG SEGMENTS TRENDS – VALUE CHANGE (%)

The growth is still positive across segment in January 2014 versus same period last year, even though it is slower compare with the previous period.

Urban

12 w/e Jan 26 2014 vs. YA

Foods	Dairy	Beverages	Home Care	Personal Care
+ 7%	+ 9%	+ 8%	+ 6%	+ 12%

Rural

12 w/e Jan 26 2014 vs. YA

Foods	Dairy	Beverages	Home Care	Personal Care
+ 7%	+ 14%	+ 15%	+ 14%	+ 15%

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

**Foods are excluding rice, sugar, and fresh food*

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3

HOT CATEGORIES (URBAN)

Carbonated Soft Drink (CSD) shows excellent growth in Urban. The incremental in number of buyer is driven by a "relatively new" brand in CSD market that launched in 2011

Carbonated Soft Drink

17%

Total volume per household (in Liters) increase in Urban Indonesia **12 w/e Jan 26 2014 vs. YA**

6.0pts

Penetration increase in Urban Indonesia **12 w/e Jan 26 2014 vs. YA**
(Base : 26.5 million households)

Rp.

25%

Value increase in Urban Indonesia **12 w/e Jan 26 2014 vs. YA**

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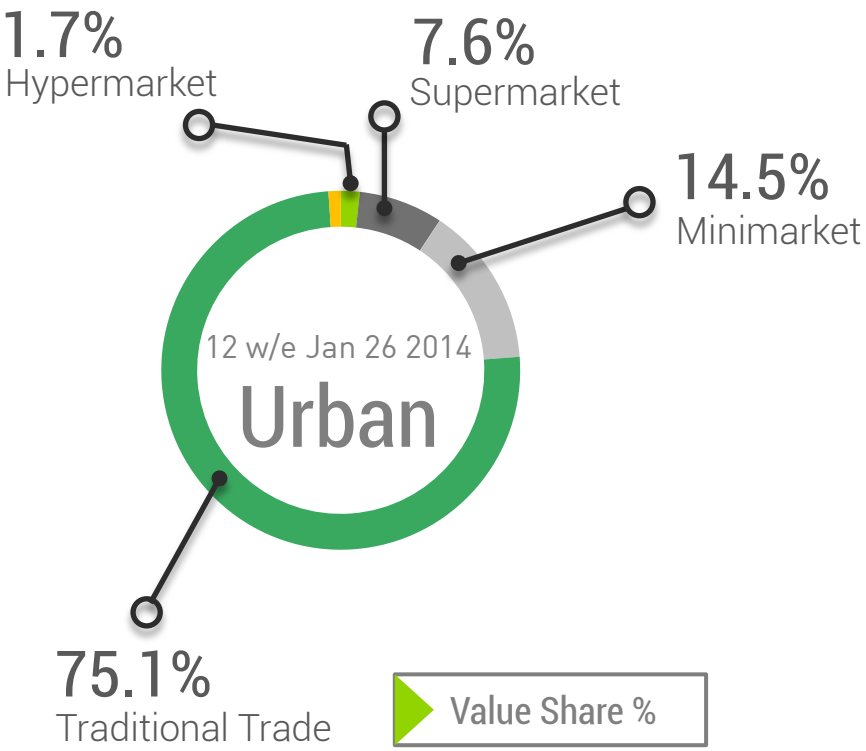
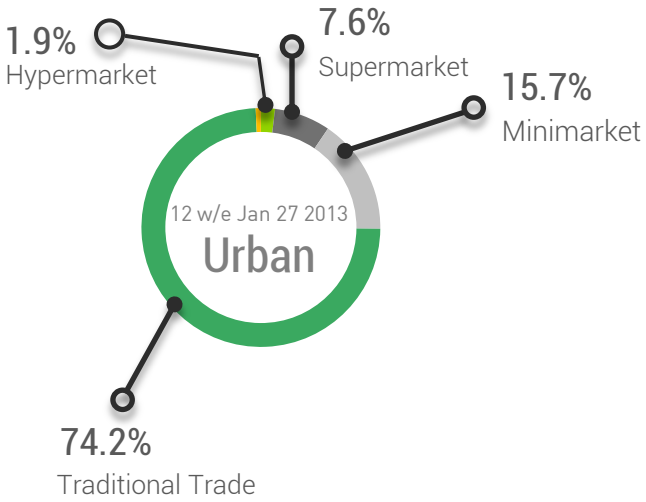
RETAILER

4 RETAILER SNAPSHOT - URBAN



Value Share %



Value Change %

Value Change %	12 w/e Jan 26 2014 vs. YA
Minimarket	+ 0%
Hyper + Supermarket	+ 8%
Traditional Trade	+ 9%

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

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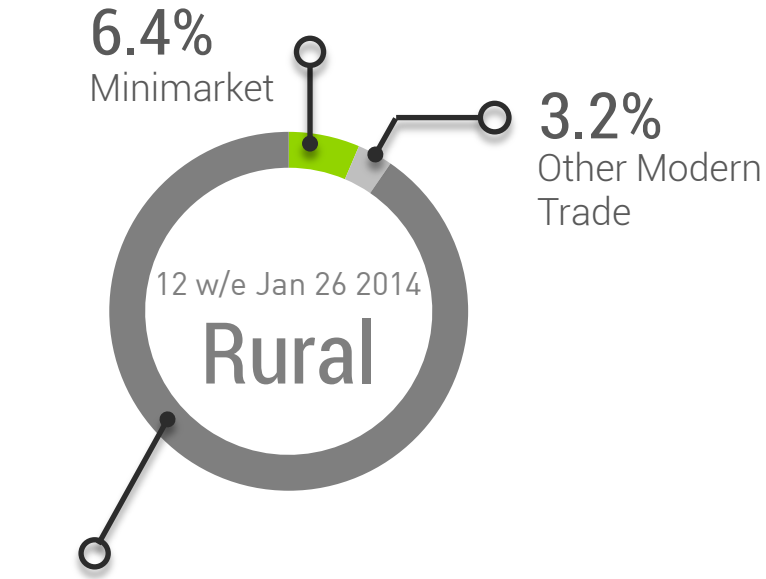
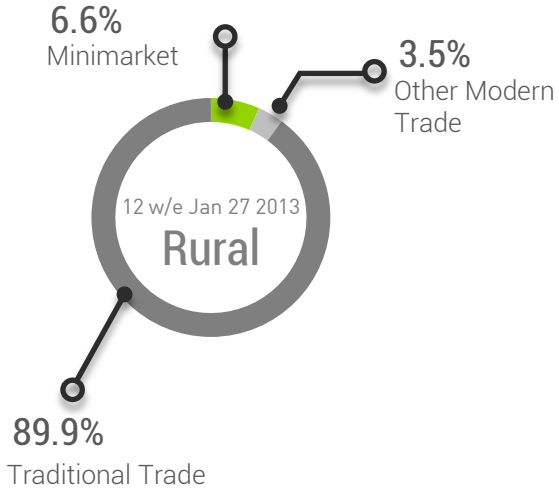
RETAILER

5 RETAILER SNAPSHOT - RURAL



Value Share %



Value Change %

Value Change %	Q4 2013 vs. YA
Minimarket	+ 7%
Traditional Trade	+ 12%

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

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About Kantar Worldpanel

Kantar Worldpanel is the world leader in consumer knowledge and insights based on continuous consumer panels. Its **High Definition Inspiration™** approach combines market monitoring, advanced analytics and tailored market research solutions to deliver both the big picture and the fine detail that inspire successful actions by its clients. Kantar Worldpanel's expertise about what people buy or use – and why – has become the market currency for brand owners, retailers, market analysts and government organizations globally.

In Indonesia, Kantar Worldpanel – high definition inspiration™ 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 49.5 million households.

For further information, please visit us at www.kantarworldpanel.com/id

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