



FMCG MONITOR

An integrated view of Indonesia FMCG market



Mar
2014

#Data up to P03 2014

executive SUMMARY

1

The consumer price index **rose 7.32 percent in March** from a year earlier.



The index fell to its lowest level in nine months in March, but Bank Indonesia (BI) has warned that there is a need to remain vigilant over the recent surge in core inflation.

2

Indonesia's **FMCG growth recovered after the slow down** in the last two quarters in 2013.



Price is the main driver of this strong incremental. It successfully pushed all FMCG segments to grow by two digits this quarter against the same quarter last year.

3

Adult Milk Powder shows excellent growth in Urban. The incremental in number of buyer and volume per household could lift the value sales significantly



This increase in buyer and consumption successfully **lifted the total sales of Adult Milk Powder by 76%.**

4

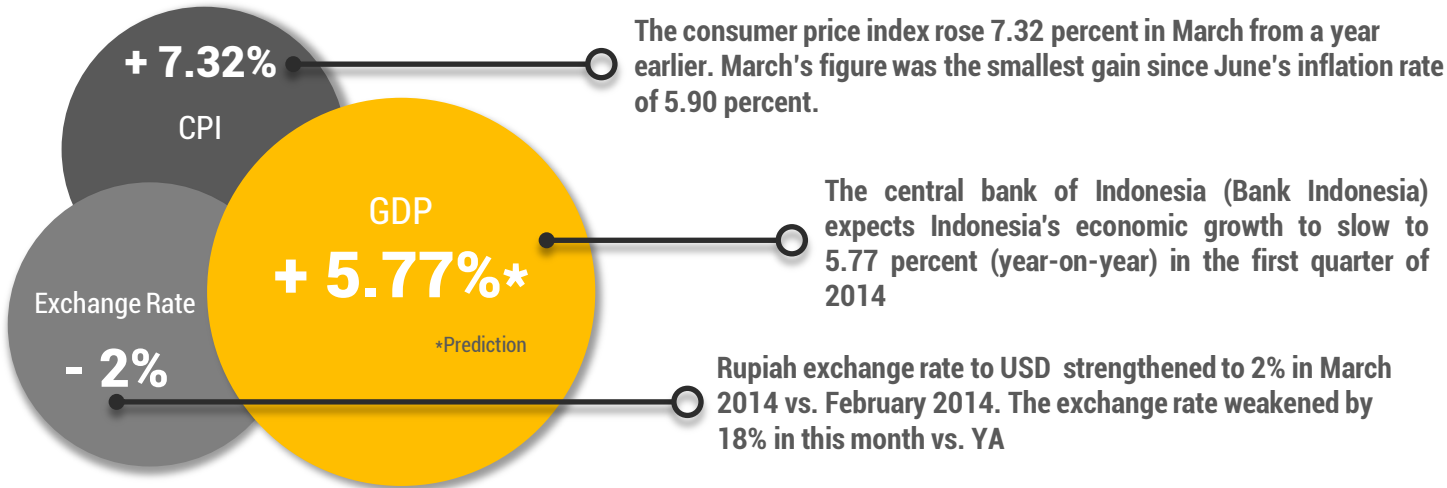
Supermarket showed a very positive trend in Urban this quarter versus same quarter last year.



This channel successfully **grew its market share by 2 percent**, whilst the Minimarket and Traditional Trade share faced a decrease.

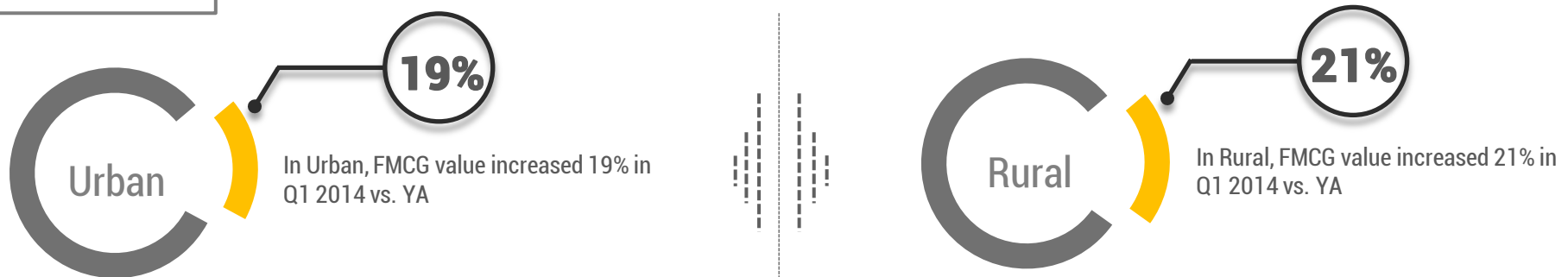
KEY INDICATOR

Macro Trend



Source : BPS and Bank Indonesia

FMCG Trend



Source : Kantar Worldpanel Indonesia | Household Panel

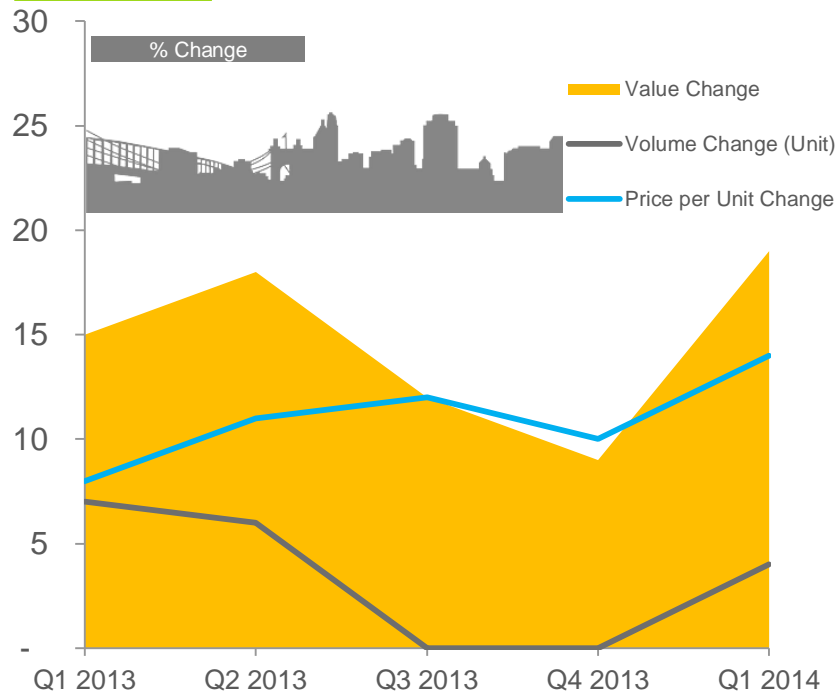
*FMCG is excluding rice, sugar, and fresh food

1

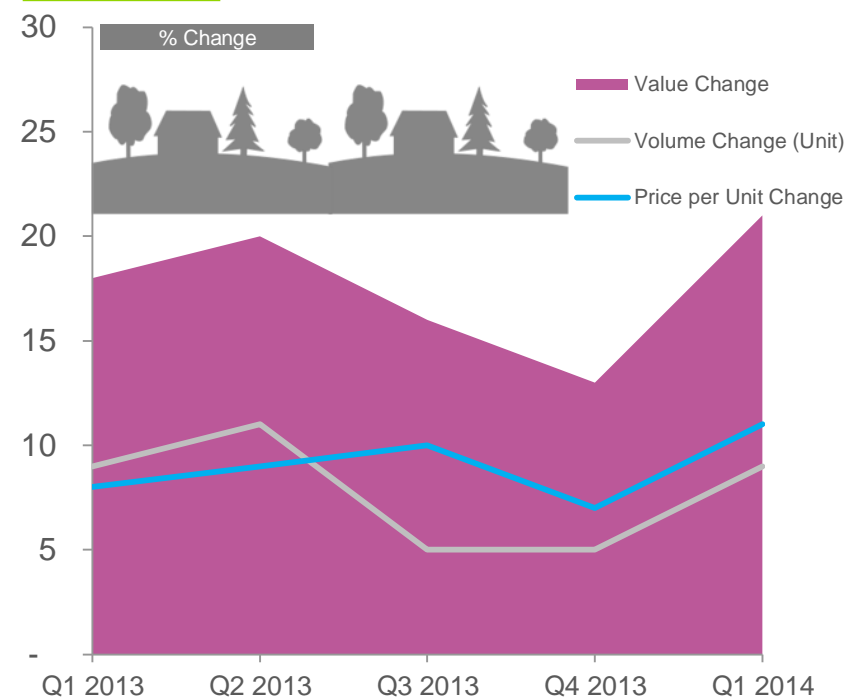
FMCG – 12 WEEKLY YEAR – ON – YEAR CHANGE (%)

Indonesia's FMCG growth recovered after the slow down in the last two quarters in 2013. It happened with the strong increase in volume and price.

Urban



Rural



Source : Kantar Worldpanel Indonesia – Household Panel – Total FMCG

*FMCG is excluding rice, sugar, and fresh food

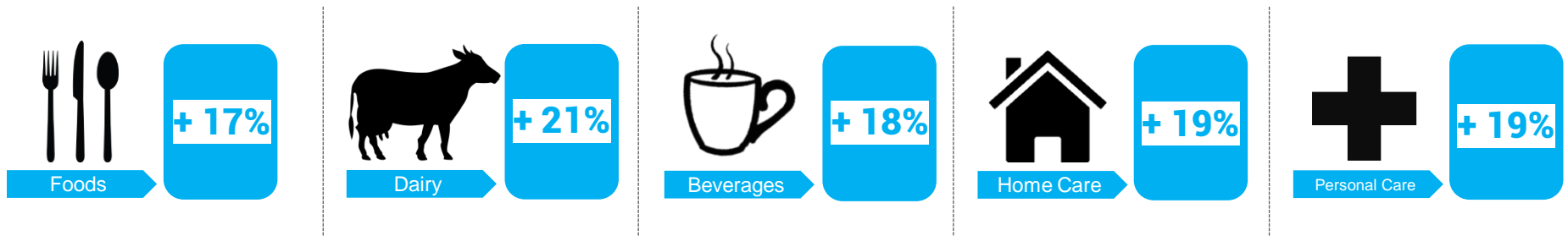
2

FMCG SEGMENTS TRENDS – VALUE CHANGE [%]

Mimicking the Total FMCG growth, all segments also grew significantly by two digits this quarter. Price is the main driver of this strong incremental.

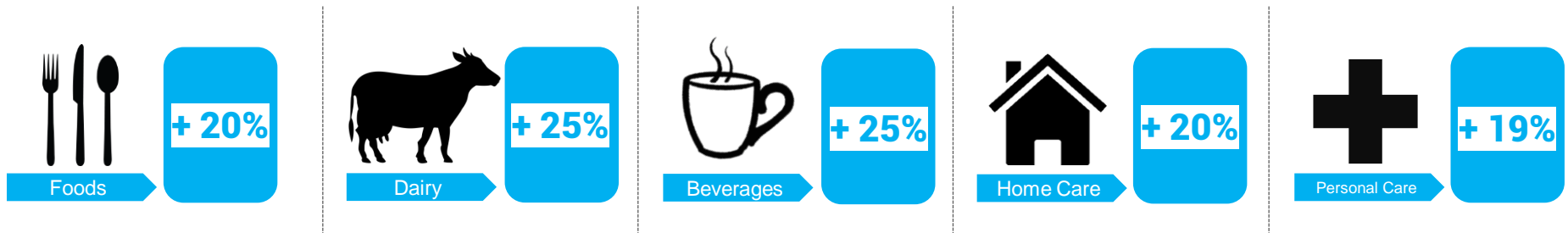
Urban

Q1 2014 vs. YA



Rural

Q1 2014 vs. YA



Source : Kantar Worldpanel Indonesia – Household Panel – Total FMCG

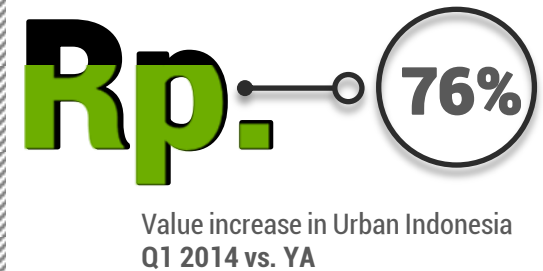
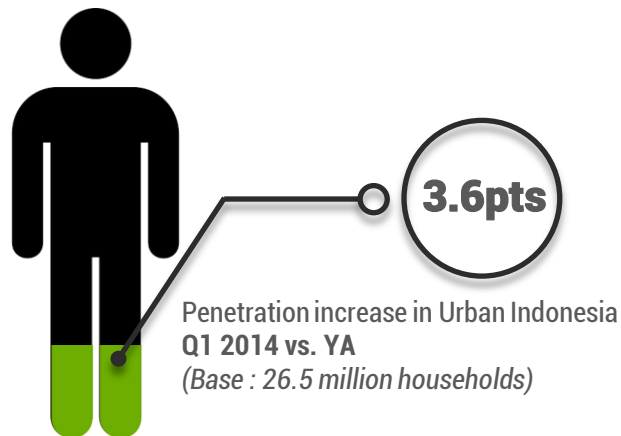
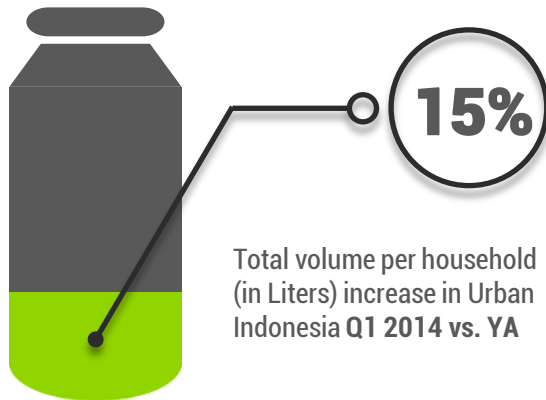
*Foods are excluding rice, sugar, and fresh food

3

HOT CATEGORIES (URBAN)

Adult Milk Powder shows excellent growth in Urban. The incremental in number of buyer and volume per household could lift the value sales significantly

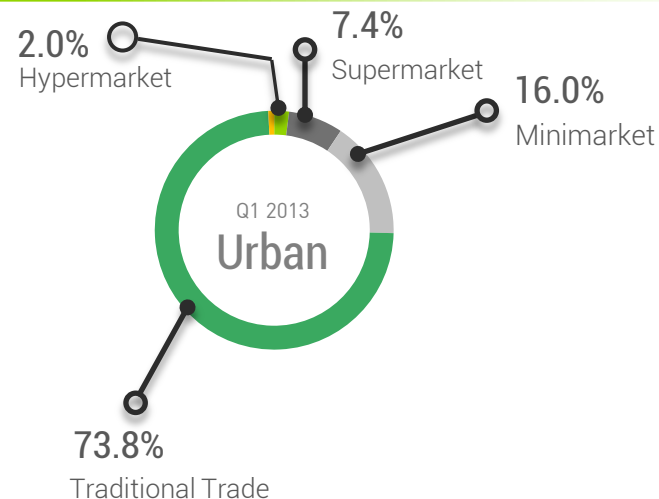
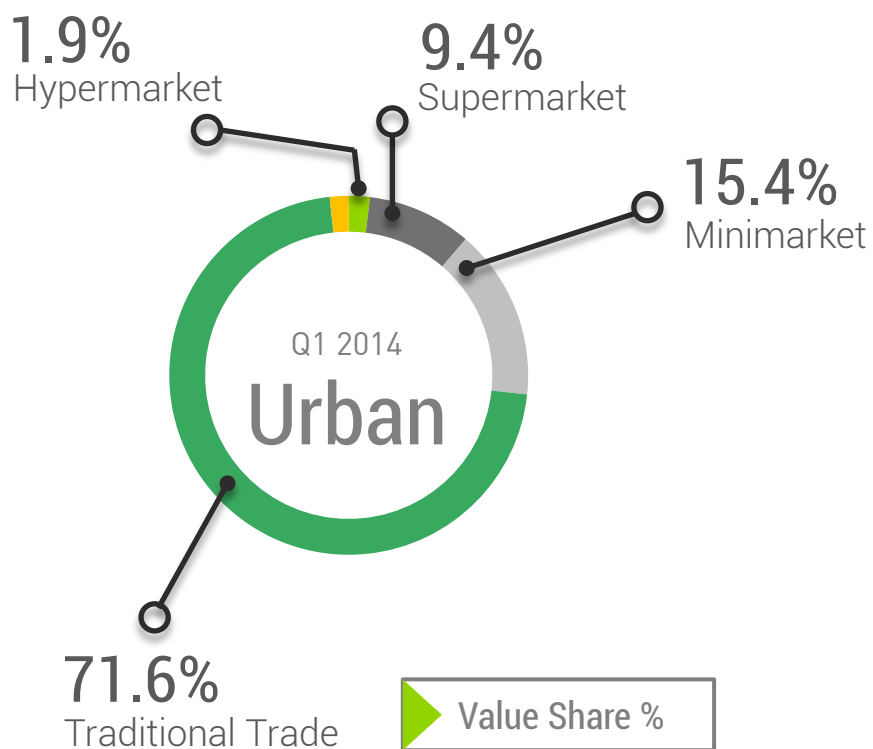
Adult Milk Powder



4

RETAILER

RETAILER SNAPSHOT - URBAN



Value Change %

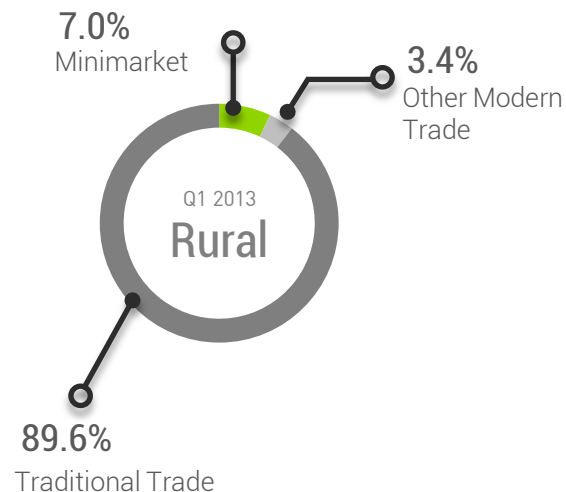
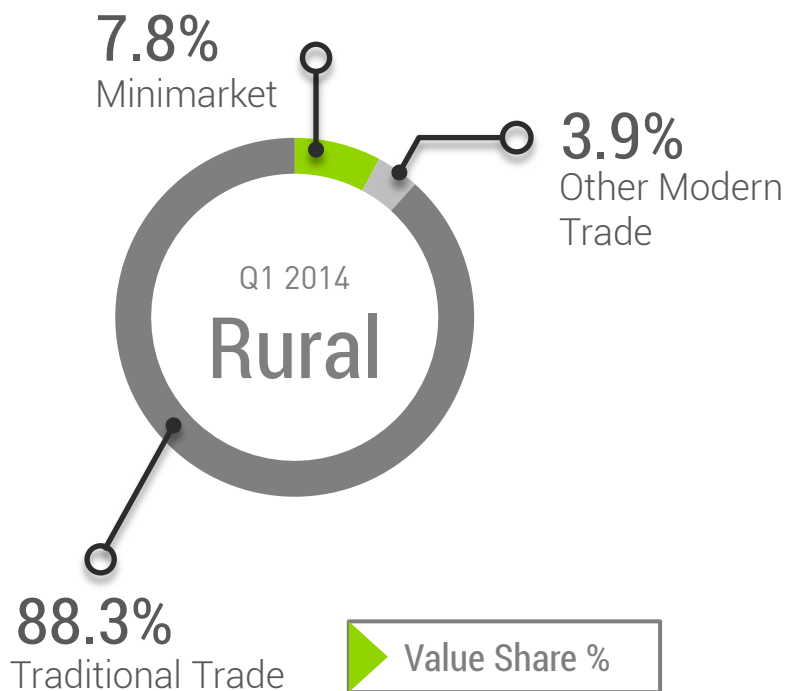
Value Change %	Q1 2014 vs. YA
Minimarket	+ 14%
Hyper + Supermarket	+ 43%
Traditional Trade	+ 15%

Source : Kantar Worldpanel Indonesia – Household Panel – Total FMCG

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RETAILER

RETAILER SNAPSHOT - RURAL



Value Change %

Value Change %	Q1 2014 vs. YA
Minimarket	+ 36%
Traditional Trade	+ 19%

Source : Kantar Worldpanel Indonesia – Household Panel – Total FMCG

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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