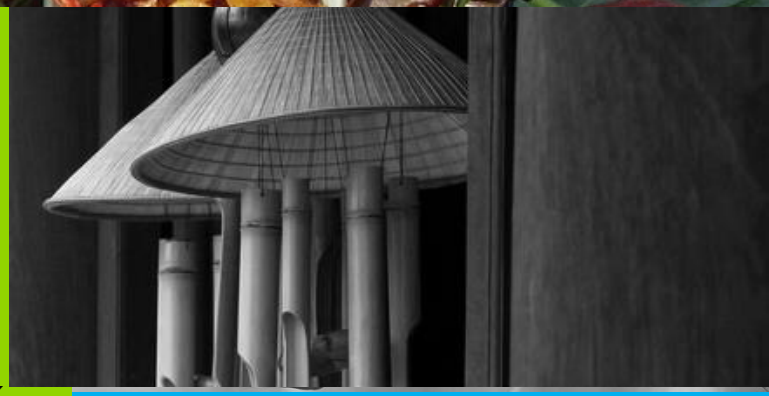
FMCG MONITOR

An integrated view of Indonesia FMCG market



Apr 2014

#Data up to P04 2014

KANTAR WORLDPANEL

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executive SUMMARY

1

Indonesia's economy grew at a much slower than expected pace in the first quarter as investments and exports weakened. Gross domestic product in the Q1 2014 **rose 5.21 percent from a year earlier.**

April's annual inflation rate **eased further to 7.25 percent**, on lower food prices with the onset of the harvest season.

2

After recovered, **Indonesia's FMCG growth remains stable in April 2014** in both Urban and Rural Indonesia.

Price remains stable of in April 2014, which has big impact on the trend. In Urban, home care shows positive trend while in Rural, dairy is the most growing segment.

3

Body Cologne 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 Body Cologne by 30%.**

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 in Rural Minimarket is showing a positive trend.

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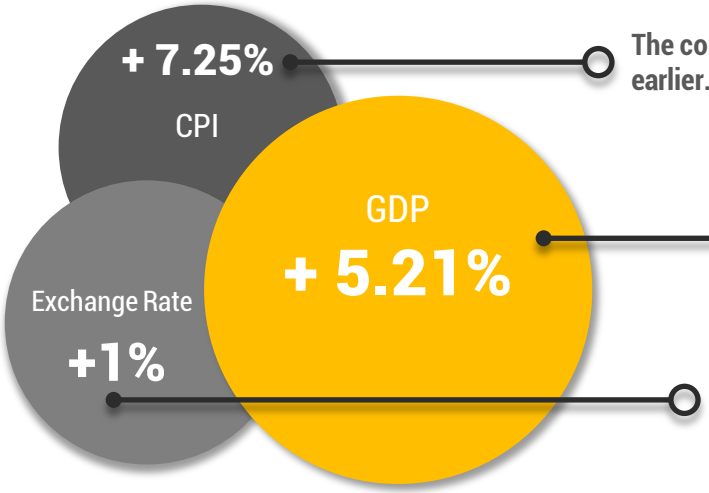
KEY INDICATOR

Macro Trend



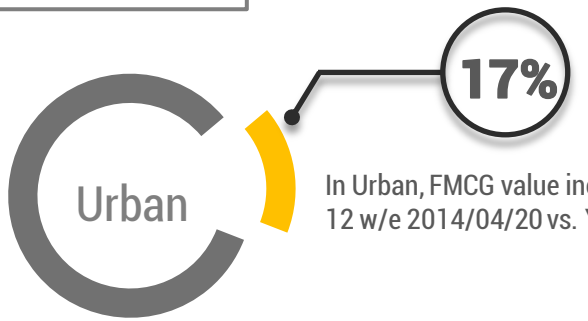
The consumer price index rose 7.25 percent in April from a year earlier.

Gross domestic product in Q1 2014 rose 5.21 percent from a year earlier, against 5.72 percent in the fourth quarter.

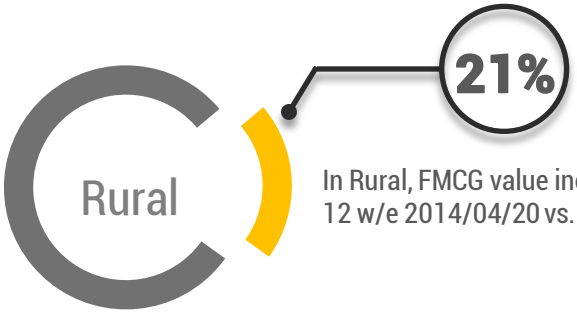
Rupiah exchange rate to USD weakened to 1% in April 2014 vs. March 2014. The exchange rate weakened by 19% in this month vs. YA

Source : *BPS and Bank Indonesia*

FMCG Trend



In Urban, FMCG value increased 17% in 12 w/e 2014/04/20 vs. YA



In Rural, FMCG value increased 21% in 12 w/e 2014/04/20 vs. YA

Source : *Kantar Worldpanel Indonesia | Household Panel*

*FMCG is excluding rice, sugar, and fresh food

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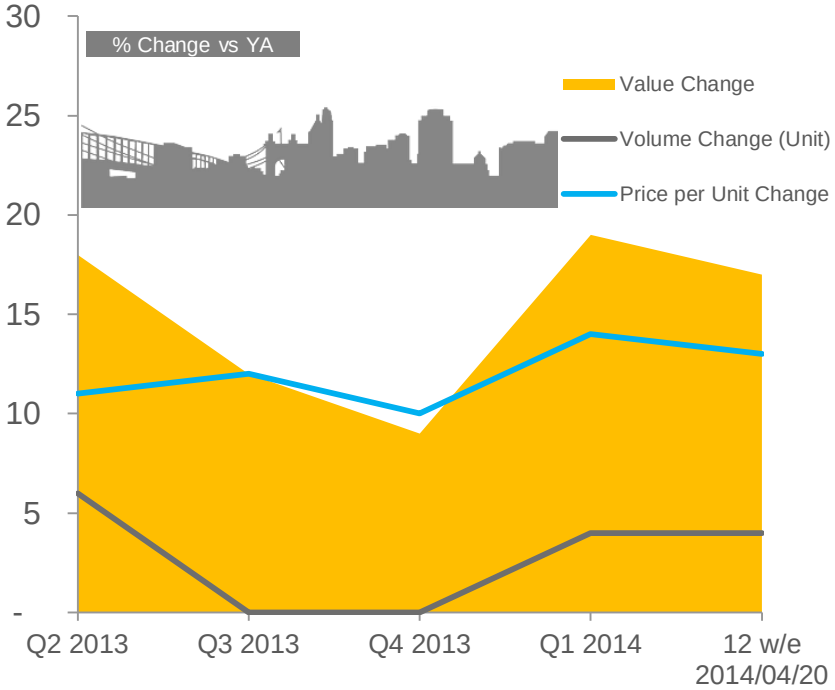
1

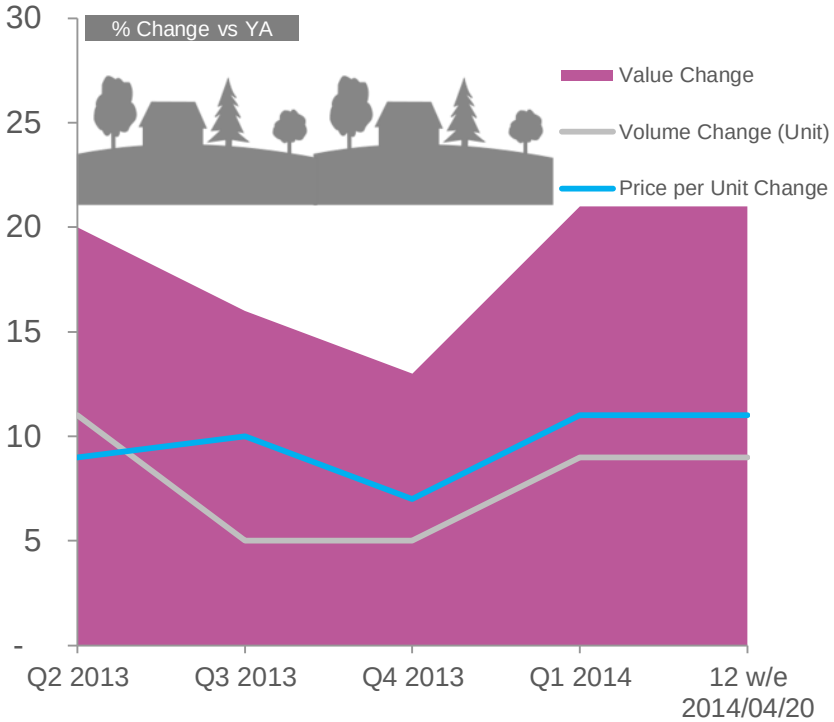
FMCG – 12 WEEKLY YEAR – ON – YEAR CHANGE (%)

After recovered, Indonesia's FMCG growth remains stable in April 2014 in both Urban and Rural Indonesia.

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 (%)

Each segment is FMCG market is also showing positive trend. In Urban, Home Care products is growing significantly.

Urban

12 w/e 2014/04/20 vs. YA

Foods	Dairy	Beverages	Home Care	Personal Care
+ 17%	+ 17%	+ 16%	+ 20%	+ 16%

Rural

12 w/e 2014/04/20 vs. YA

Foods	Dairy	Beverages	Home Care	Personal Care
+ 21%	+ 26%	+ 22%	+ 21%	+ 20%

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

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

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3

HOT CATEGORIES (URBAN)

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

Body Cologne

10%

Total volume per household (in Liters) increase in Urban Indonesia
12 w/e 2014/04/20 vs. YA

2.0pts

Penetration increase in Urban Indonesia
12 w/e 2014/04/20 vs. YA
(Base : 26.5 million households)

Rp.

20%

Average Spending per household increase in Urban Indonesia **12 w/e 2014/04/20 vs. YA**

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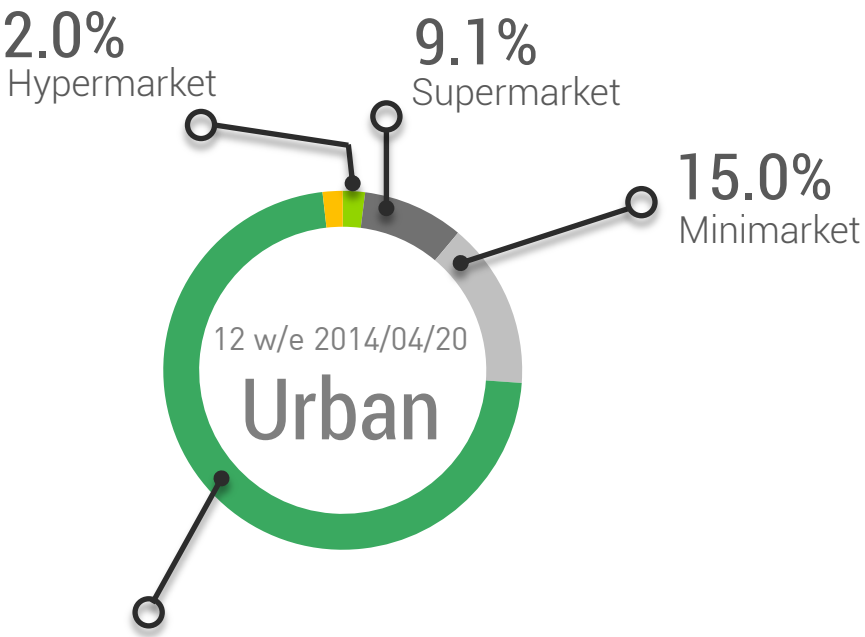
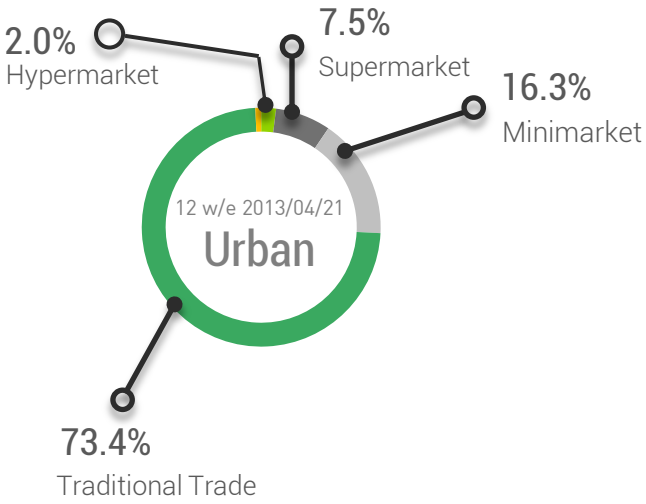
RETAILER

4 RETAILER SNAPSHOT - URBAN



Value Share %



Value Change %

Value Change %	12 w/e 2014/04/20 vs. YA
Minimarket	+ 8%
Hyper + Supermarket	+ 37%
Traditional Trade	+ 15%

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

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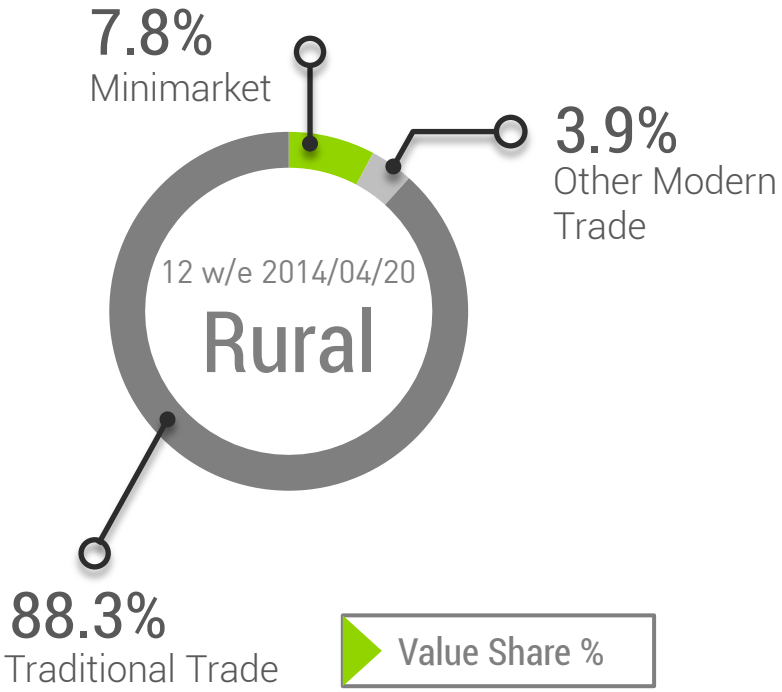
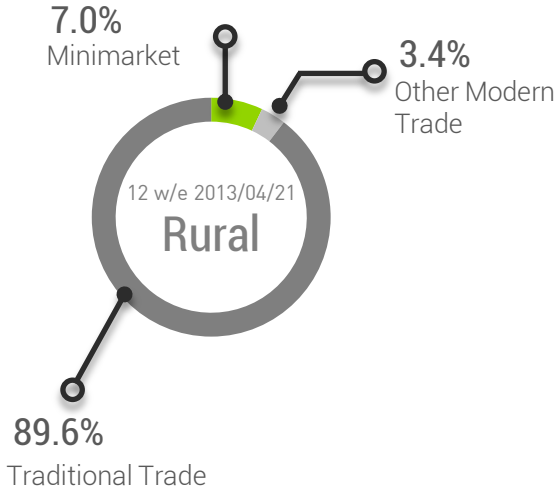
RETAILER

5 RETAILER SNAPSHOT - RURAL



Value Share %



Value Change %

Value Change %	12 w/e 2014/04/20 vs. YA
Minimarket	+ 37%
Traditional Trade	+ 20%

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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