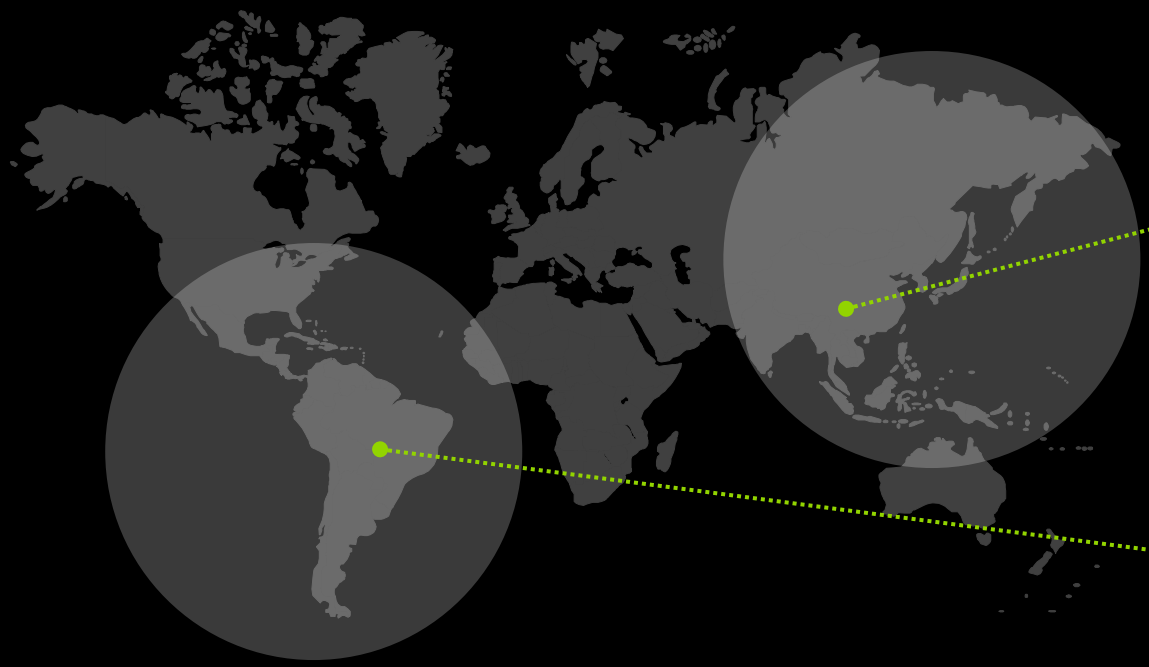
# CONSUMER INSIGHTS 2014

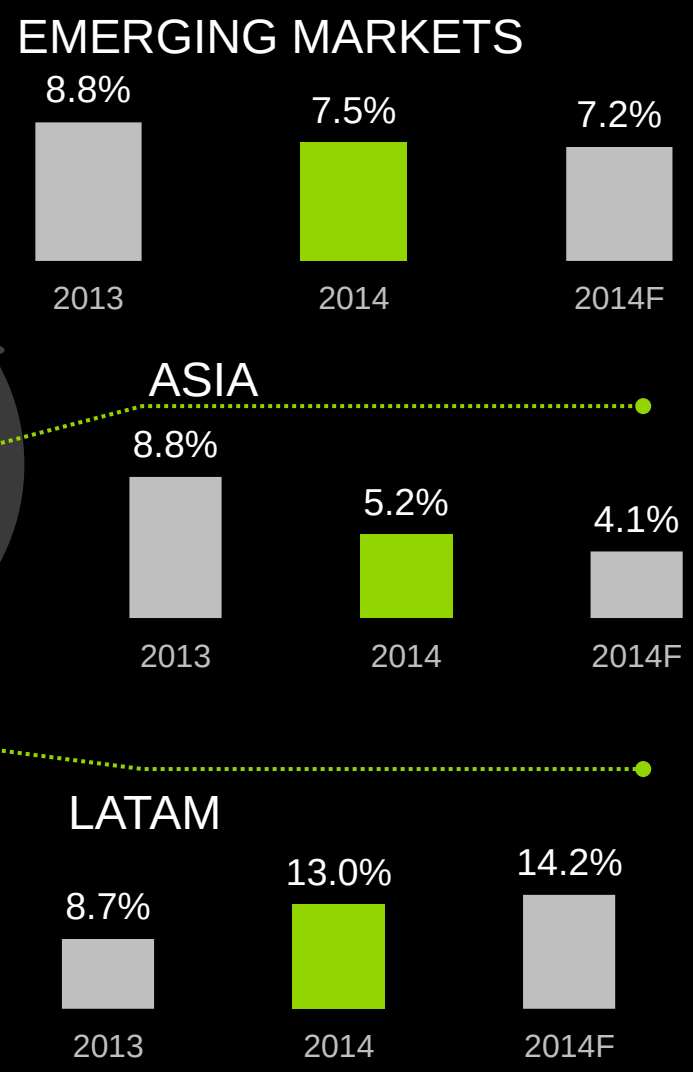
## Emerging Markets / Q2

KANTAR WORLDPANEL High definition inspiration

# FMCG SLOWS DOWN IN ASIA, HALF THE GROWTH THAN 2 YEARS AGO

## LATAM TAKES THE LEAD IN TERMS OF GROWTH

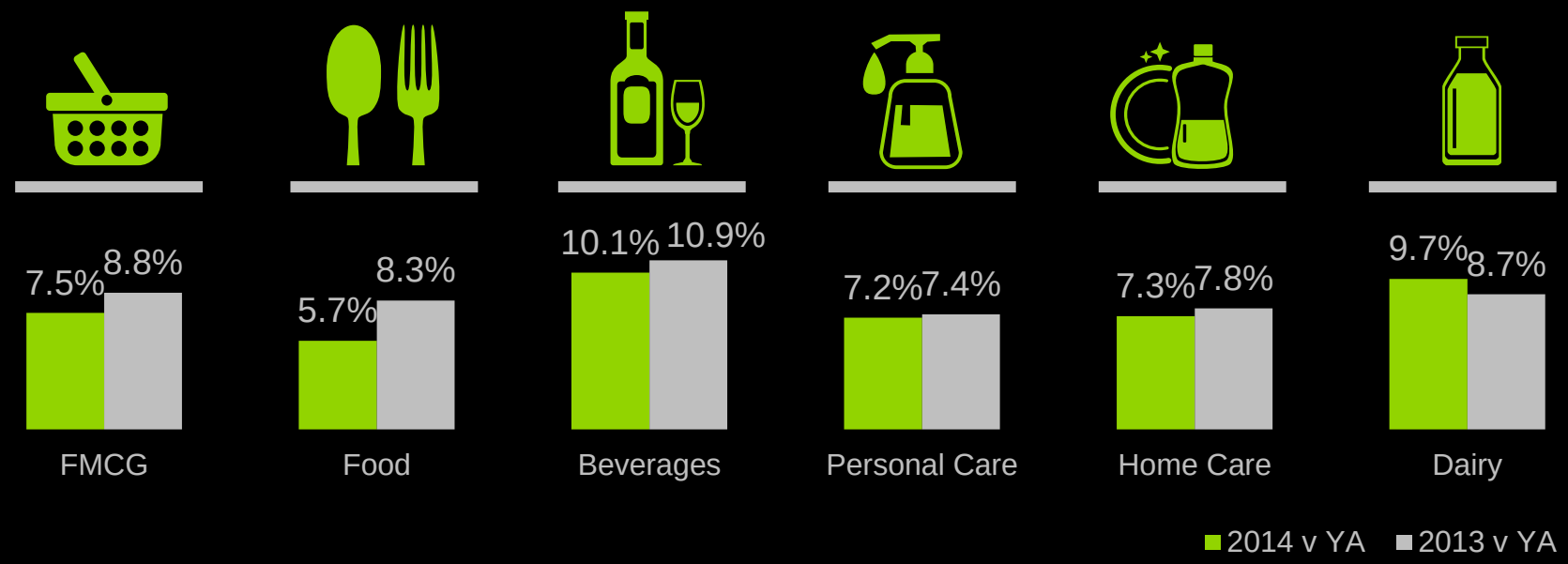





FMCG / MAT Q2 2014 & 2013

# HEALTHY BEVERAGES GROWING STRONG, RTD TEA WITHIN TOP RISER
## DAIRY PRODUCTS SPENDING INCREASES

### TOTAL EMERGING MARKETS

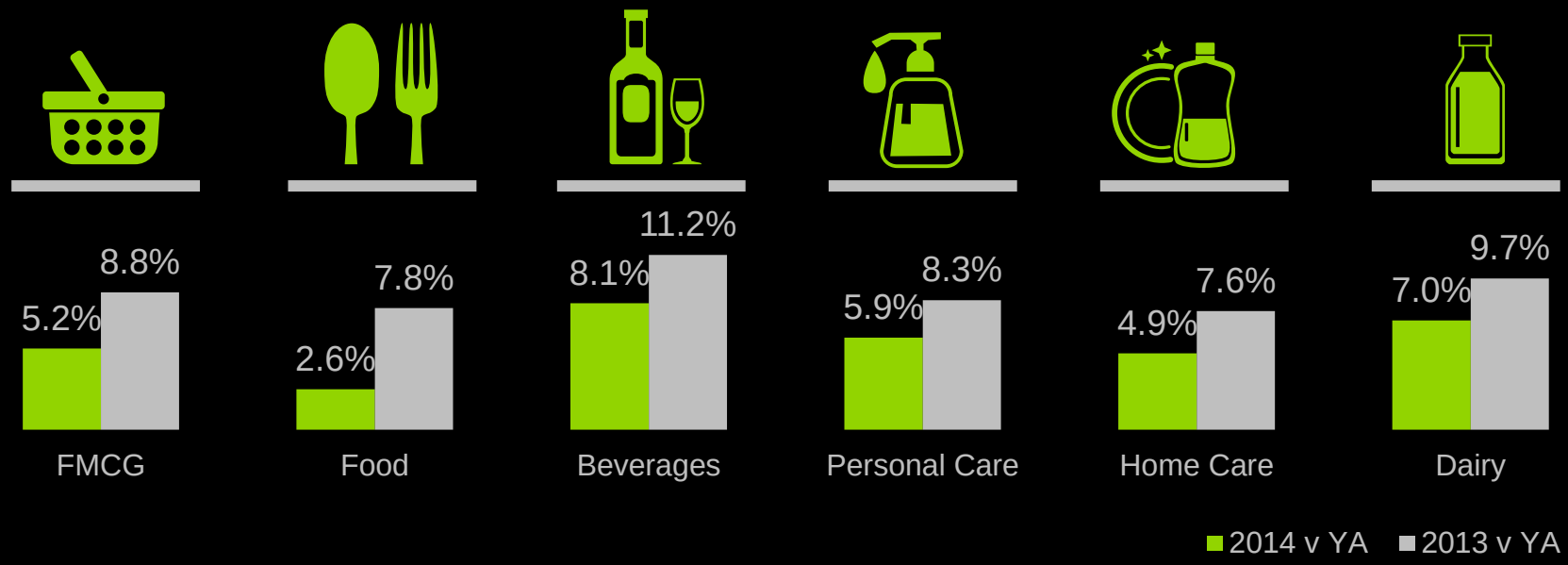



EMERGING MARKETS / MAT Q2 2014 & 2013

# ASIA´S DECELERATION MAINLY SEEN IN FOOD CATEGORIES

## PRICE INCREASE, FOOD SCARES AND FRESHER ALTERNATIVES

ASIA

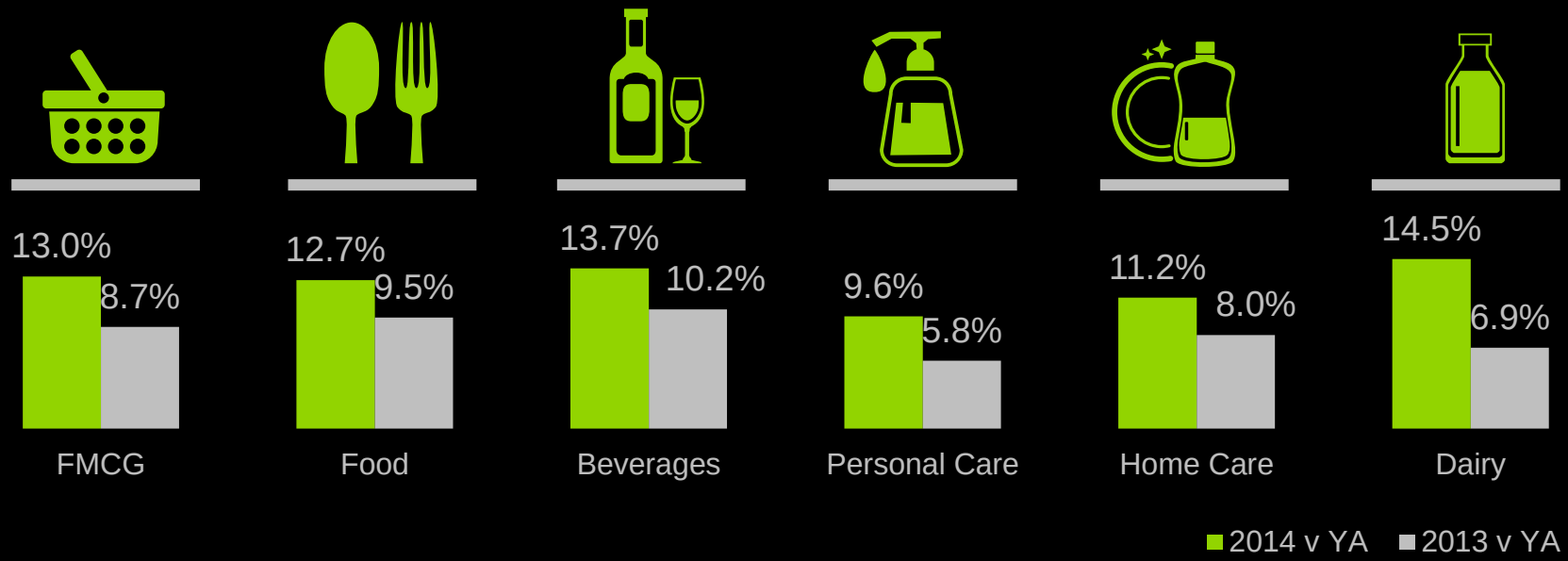



ASIA / MAT Q2 2014 & 2013

# PERSONAL CARE DOUBLES SPEED OF GROWTH

## DAIRY PRODUCTS GAIN IMPORTANCE IN HOUSEHOLDS BUDGET

LATAM




LATAM / MAT Q2 2014 & 2013

# CONSUMER INSIGHTS
## ASIA 2014

KANTAR WORLDPANEL High definition inspiration

Back to the beginning

# MAT Q2 2014 | SUMMARY ASIA

#FMCGSlowdown Except for India, growth has decelerated in all Asian markets driven by low income households. E-commerce keep growing fast especially in Korea and China

#BeautyFirst Personal care basket continues growing strong in Taiwan, Indonesia, India, Philippines, Thailand and Vietnam. Make-up, skincare, facial tissues and liquid soaps keep recruiting shoppers

#WesternCategories Breakfast cereals, spreads, butter, wine, ketchup among top recruiters in specific countries

#GoSpecific Household cleaning categories with specific usage on the rise: toilet cleaners, insecticides, air fresheners, floor cleaners, wet tissue, fabric enhancers. Check out which categories grow where!

% Value Change FMCG – MAT Q2 2014 vs. Year ago

| | China | India | Indonesia | Korea | Malaysia | Philippines | Saudi | Thailand | Taiwan | Vietnam |
|---|---|---|---|---|---|---|---|---|---|---|
| FMCG Total | Growth > 5% | Growth > 5% | Growth > 5% | -0.5% < Growth ≤ 5% | -0.5% < Growth ≤ 5% | Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5% | -0.5% < Growth ≤ 5% | Growth > 5% |
| Food | -0.5% < Growth ≤ 5% | Growth > 5% | Growth > 5% | -0.5% < Growth ≤ 5% | -0.5% < Growth ≤ 5% | Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5% | -0.5% < Growth ≤ 5% | -0.5% < Growth ≤ 5% |
| Beverages | Growth > 5% | -0.5% < Growth ≤ 5% | Growth > 5% | Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5% | Growth ≤ -0.5% | Growth > 5% |
| Dairy Products | Growth > 5% | Growth > 5% | Growth > 5% | Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | -0.5% < Growth ≤ 5% | -0.5% < Growth ≤ 5% | Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5% |
| Home Care | -0.5% < Growth ≤ 5% | Growth > 5% | Growth > 5% | -0.5% < Growth ≤ 5% | -0.5% < Growth ≤ 5% | -0.5% < Growth ≤ 5% | -0.5% < Growth ≤ 5% | Growth > 5% | -0.5% < Growth ≤ 5% | Growth > 5% |
| Personal Care | Growth > 5% | Growth > 5% | Growth > 5% | -0.5% < Growth ≤ 5% | Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | -0.5% < Growth ≤ 5% | Growth > 5% | Growth > 5% | Growth > 5% |

Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

Back to the beginning

# ASIA IN 10 CLICKS

Click on each country to display or hide Insights

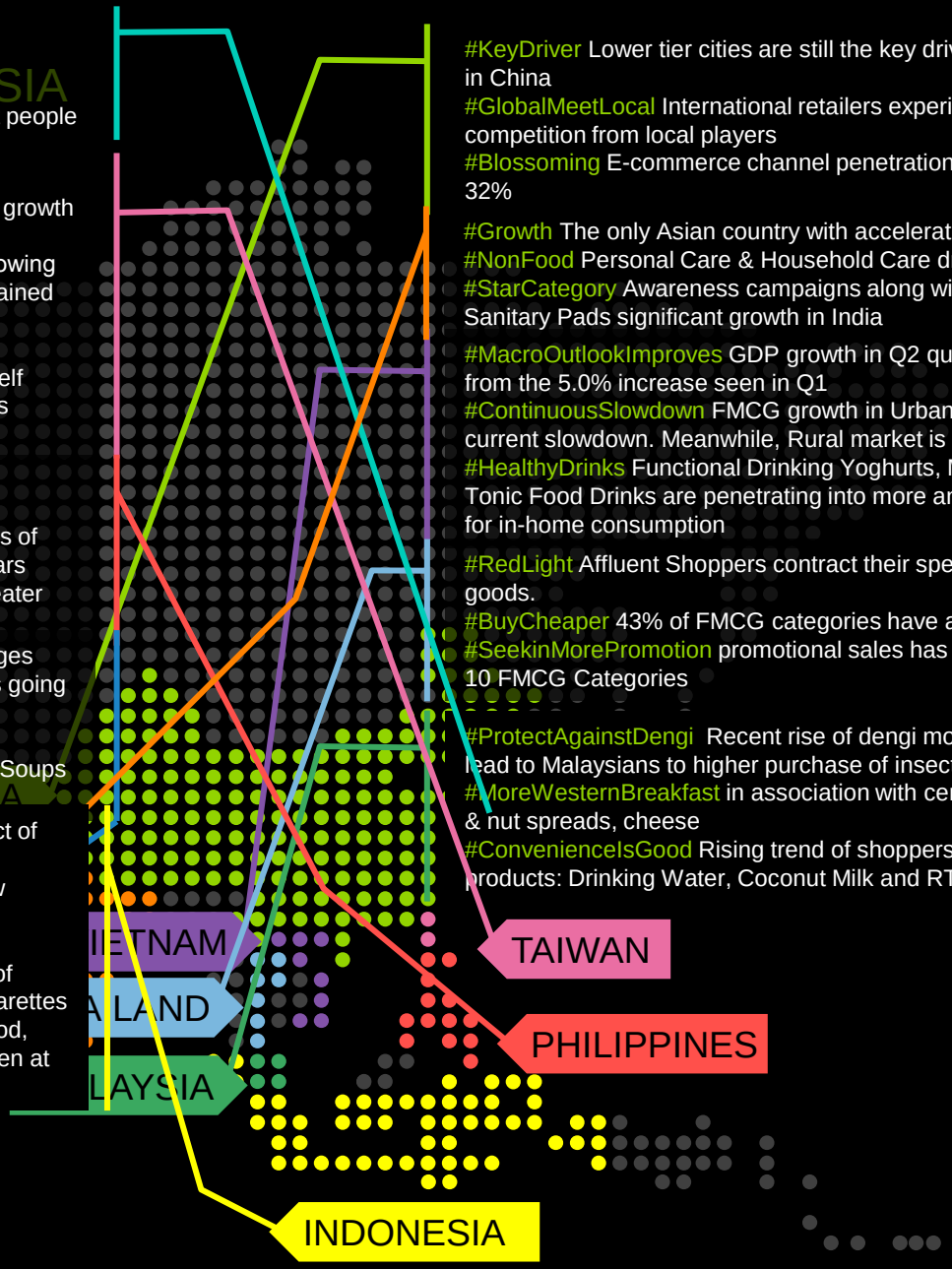
# MACROECONOMIC SUMMARY ASIA

#ExternalEffect National tradegy -Sewol ferry accident- affects people´s spend on consumer goods
#MiddleIncome the only segment increasing consumption
#Fast&Convenient& Personal Less time and easy usage attract people

#ShortTermReturn Taiwan's economic indicators are showing promising performance, with FMCG showing a slight short term growth return
#FoodSafety the impact of last year's food safety incidents is slowing wearing off, but performance of instant food categories still remained weak
#FreshImpress Costco remain strong, but PX mart & CVS are declining in importance, possible reasons include decreased shelf space by fresh food expansion and popularity of Takeaway cups respectively.

#BreakfastIsReady More Filipino homes opt to avoid cooking breakfast meals as RTE cereals continue to grow
#ModernTradeGain Sari-sari stores remain the top retail sources of FMCG but have lost 3 sharepoints to modern retail in past 3 years
#BabyCare With the rise of households with toddlers comes greater demand for baby essentials such as, wipes, diapers, and milk
#VolumeContraction FMCG decline in volume is led by Beverages
#AffluentShoppersDown FMCG spends among affluent class is going down over the years, a big drop is seen in average spend per household
#RisingStars Spreads, Condensed Milk, Disinfectants, Labneh, Soups & Bouillon are posting double digit growth

**#EconomySlowDown** Q2´14 FMCG growth deceleration; impact of overall economy situation and external factors (May and June preparation for Eidul Fitri, school holiday, and preparation of new school enrolment)
**#InflationUp** Q2 2014 annual inflation rate is 6.8%. The biggest contribution in June inflation is foodstuff, due to price increases of commodities e.g. chicken meat, vegetables, electricity rates, cigarettes
**#Convenience and Indulgence trends** Canned food, frozen food, RTD tea and soft drink are successful to grow (volume wise), even at the time when price inflation is high




#KeyDriver Lower tier cities are still the key driver for FMCG growth in China
#GlobalMeetLocal International retailers experiencing fierce competition from local players
#Blossoming E-commerce channel penetration has now reached 32%

#Growth The only Asian country with accelerated growth
#NonFood Personal Care & Household Care drive FMCG growth
#StarCategory Awareness campaigns along with low cost led to Sanitary Pads significant growth in India

#MacroOutlookImproves GDP growth in Q2 quickens to 5.25%, up from the 5.0% increase seen in Q1
#ContinuousSlowdown FMCG growth in Urban has not escaped its current slowdown. Meanwhile, Rural market is losing its momentum
#HealthyDrinks Functional Drinking Yoghurts, Mineral Water and Tonic Food Drinks are penetrating into more and more households for in-home consumption

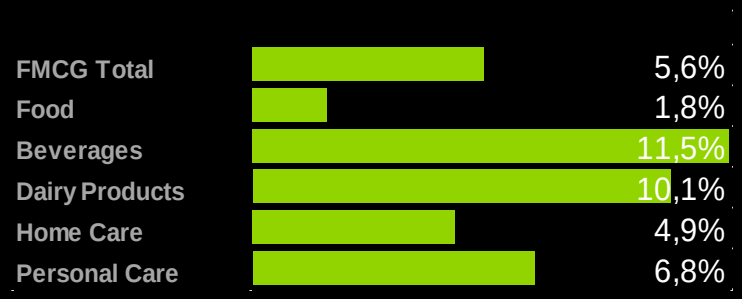
#RedLight Affluent Shoppers contract their spending on consumer goods.
#BuyCheaper 43% of FMCG categories have a lower average price
#SeekinMorePromotion promotional sales has increased in 8 out of 10 FMCG Categories

#ProtectAgainstDengi Recent rise of dengi mosquito outbreak has lead to Malaysians to higher purchase of insecticide
#MoreWesternBreakfast in association with cereal, butter, chocolate & nut spreads, cheese
#ConvenienceIsGood Rising trend of shoppers seeking ready to use products: Drinking Water, Coconut Milk and RTD Tea for in-home

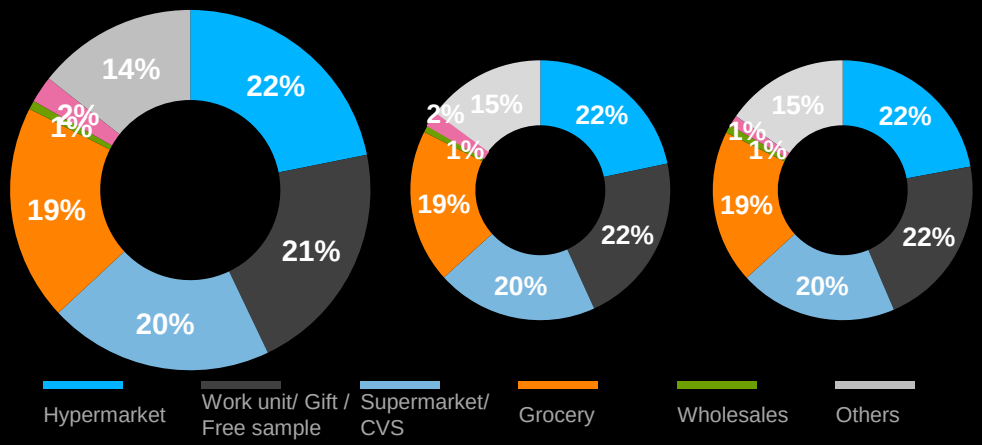
By clicking on the country insights will display. Click again to hide.

Details per country: click here

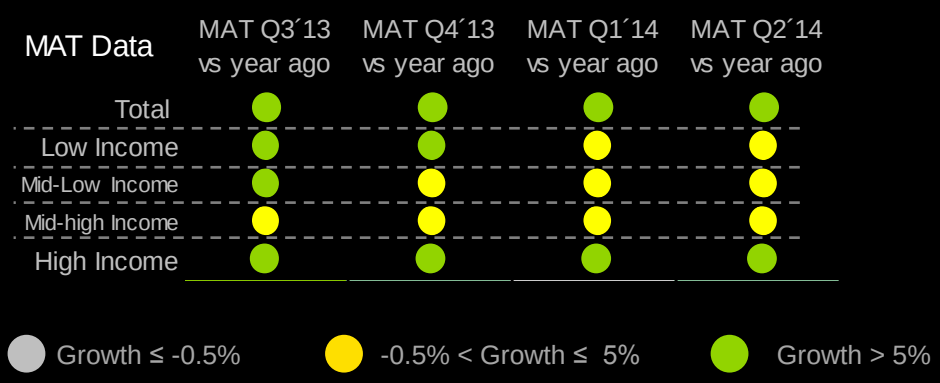
## BASKET TRENDS – %Value Change MAT Q2.14 vs. YA




## MAT Q2.14 / MAT Q2.13 / MAT Q2.12




## %CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

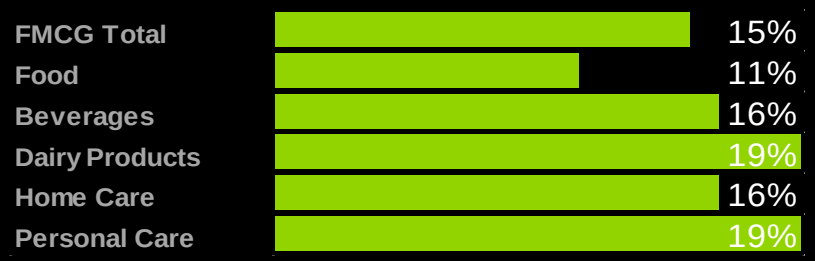



## TOP 10 RECRUITERS IN CHINA (by penetration points growth)

| Rank 2014 | Categories | Additional Penetration points |
|---|---|---|
| 1 | FUNCTION DRINK | 4,4 |
| 2 | FOREIGN SPIRIT | 2,9 |
| 3 | CEREALS | 2,2 |
| 4 | COCO CONFECTIONARY | 2,0 |
| 5 | RTD TEA | 1,0 |
| 6 | RTD COFFEE | 0,7 |
| 7 | FABRIC SOFTENER | 0,5 |
| 8 | INSECTICIDES | 0,5 |
| 9 | YOGURT | 0,3 |
| 10 | ORAL CARE | 0,2 |

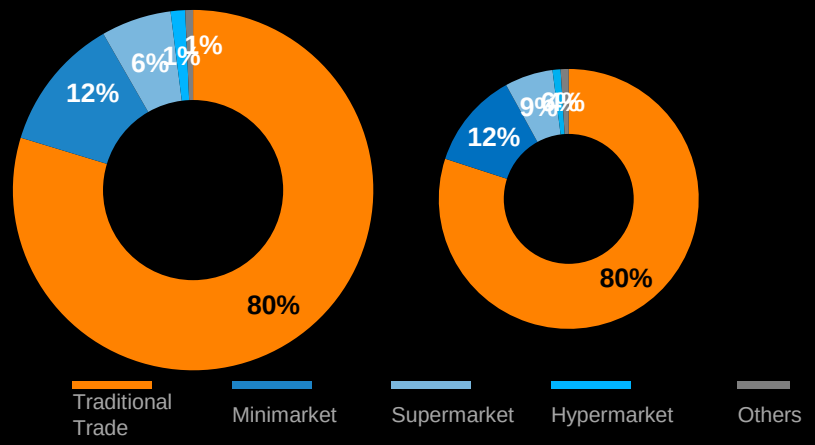
Source: MAT Q214 vs YA Category Penetration%

## BASKET TRENDS – %Value Change MAT Q2.14 vs. YA




***Indonesia National Data**

## MAT Q2.14 / MAT Q2.13

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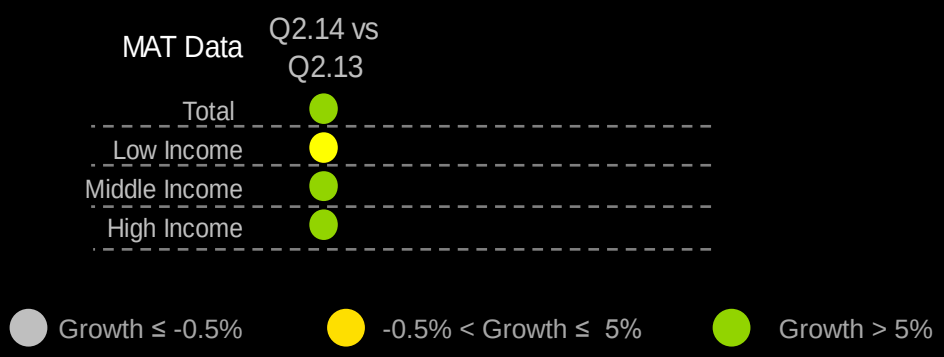
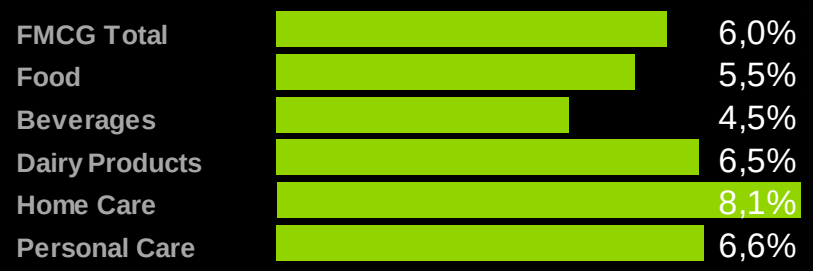



## TOP 10 RECRUITERS IN INDONESIA (by penetration points growth)

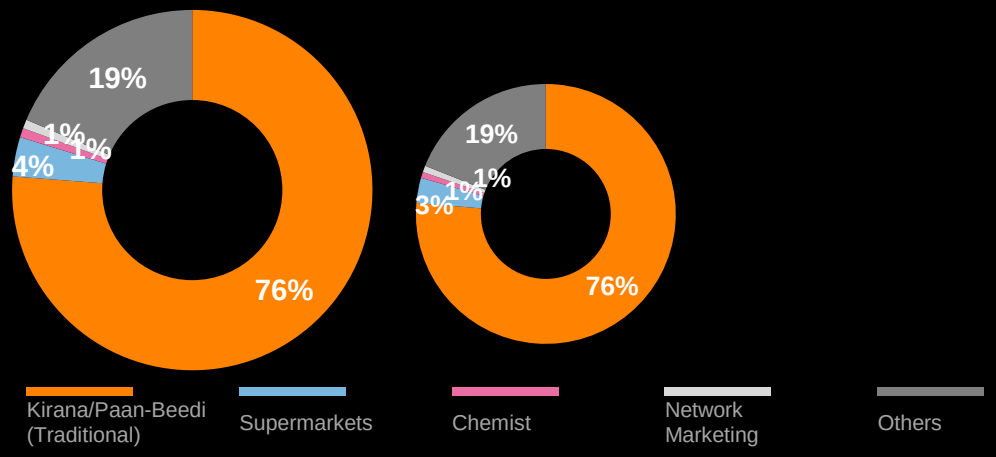
| Rank 2014 | Categories | Additional Penetration points |
|---|---|---|
| 1 | SOFT DRINK | 9,7 |
| 2 | COCONUT MILK | 8,7 |
| 3 | FACIAL TISSUE | 8,7 |
| 4 | AIR FRESHENER | 6,6 |
| 5 | CANNED FOOD | 6 |
| 6 | CHILI SAUCE | 5,8 |
| 7 | RAZOR | 5,4 |
| 8 | READY TO DRINK COFFEE | 5,3 |
| 9 | READY TO DRINK TEA | 5,2 |
| 10 | ICE CREAM | 4,6 |

Source: MAT Q2 14 vs YA Category Penetration%

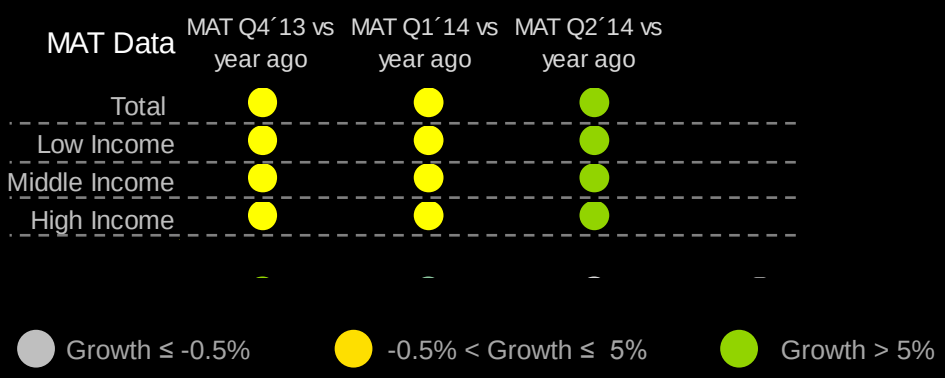
## BASKET TRENDS – %Value Change MAT Q2.14 vs. YA




## MAT Q2.14 / MAT Q2.13




## %CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

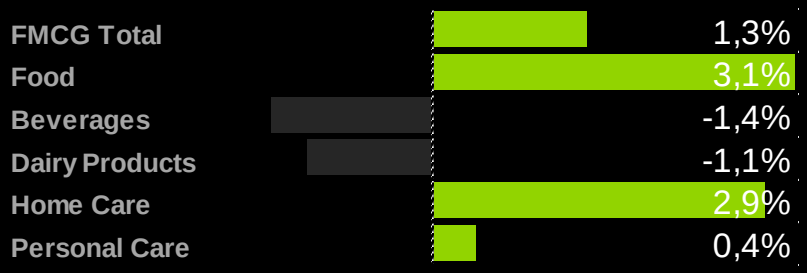



## TOP 10 RECRUITERS IN INDIA (by penetration points growth)

| Rank 2014 | Categories | Additional Penetration points |
|---|---|---|
| 1 | SANITARY PRODUCTS | 3,9% |
| 2 | SAUCE/KETCHUP | 1,5% |
| 3 | METAL SCOURERS | 1,2% |
| 4 | ATTA/WHEAT | 0,9% |
| 5 | NOODLE/MACARONI | 0,8% |
| 6 | FLOOR CLEANER | 0,8% |
| 7 | DEPLATORIES | 0,2% |
| 8 | BOTTLED SOFT DRINK | 0,2% |
| 9 | TOILET CLEANERS | 0,1% |
| 10 | SHAMPOO | 0,1% |

Source: MAT Q214 vs YA Category Penetration%

## BASKET TRENDS – %Value Change MAT Q2.14 vs. YA

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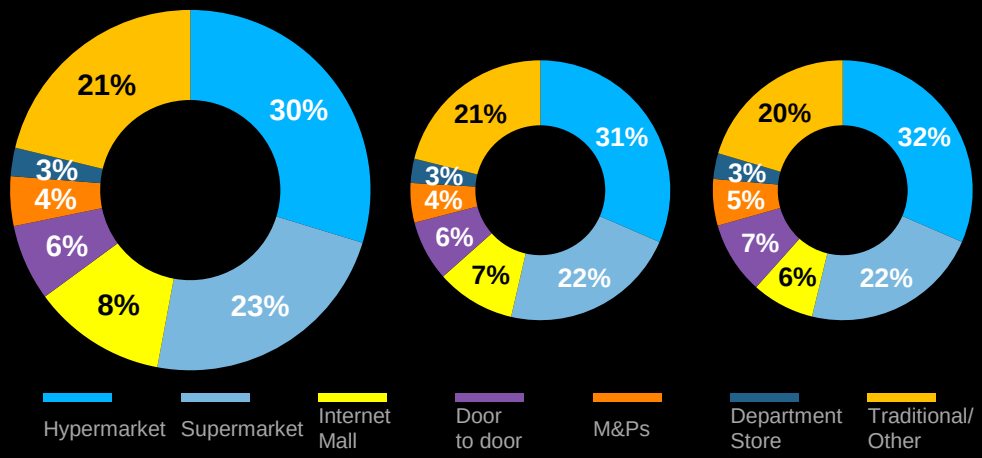
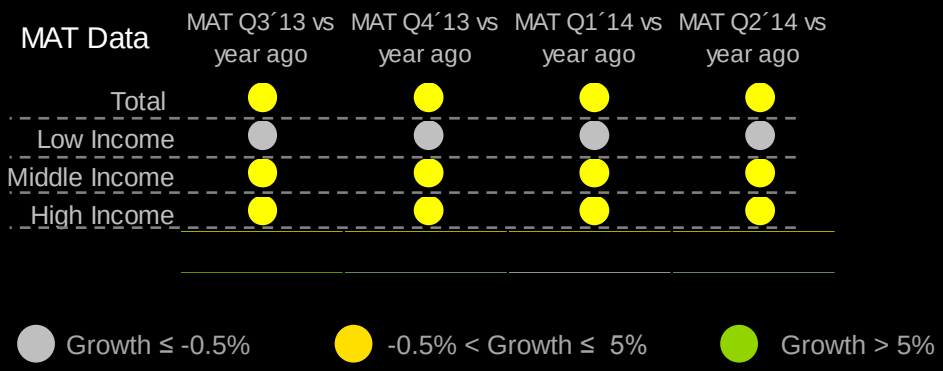



## %CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

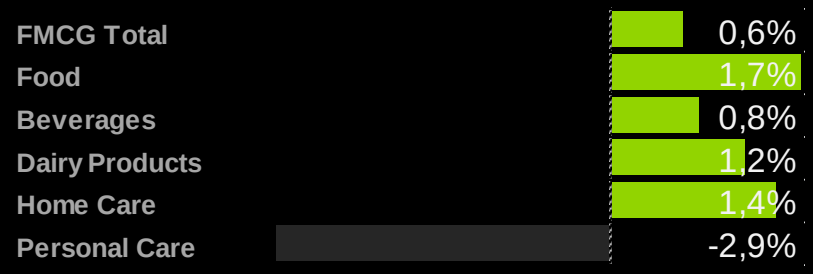



## TOP 10 RECRUITERS IN KOREA (by penetration points growth)

| Rank 2014 | Categories | Additional Penetration points |
|---|---|---|
| 1 | Frozen Food | 4% |
| 2 | Vinegar | 4% |
| 3 | Pudding | 3% |
| 4 | Spread | 2% |
| 5 | Home Cleaner | 2% |
| 6 | Eye Shadow | 2% |
| 7 | Mouth Wash | 1% |
| 8 | Tampon | 0% |
| 9 | Weaning food | 0% |
| 10 | Foundation | 0% |

Source: MAT Q214 vs YA Category Penetration%

## BASKET TRENDS – %Value Change MAT Q2.14 vs. YA

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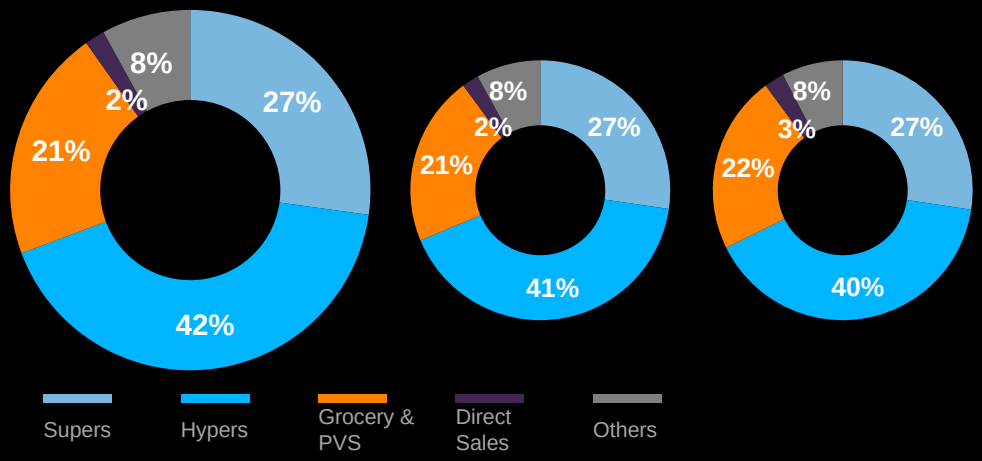
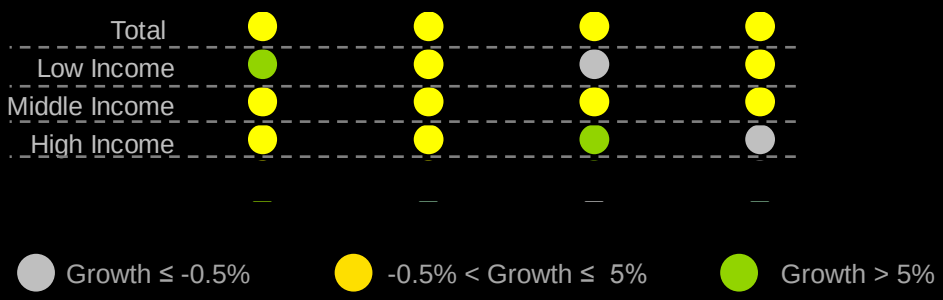



## %CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL




## TOP 10 RECRUITERS IN MALAYSIA (by penetration points growth)

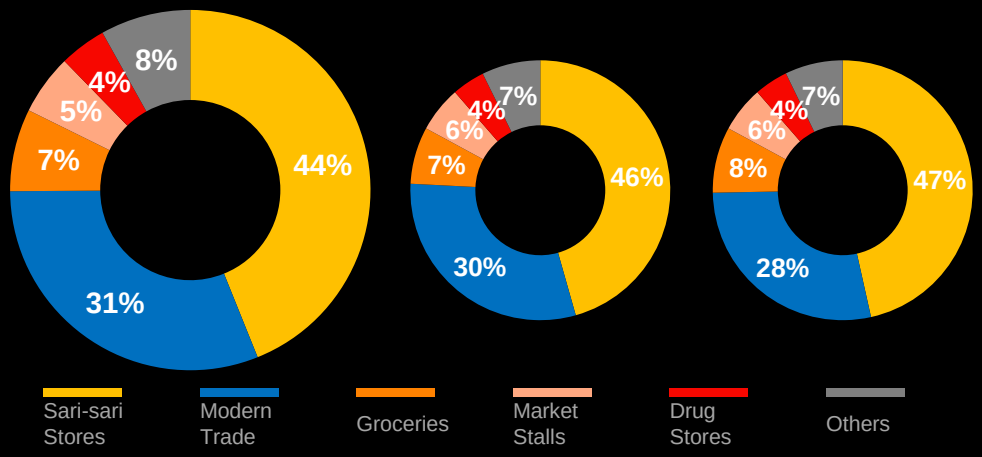
| Rank 2014 | Categories | Additional Penetration points |
|---|---|---|
| 1 | LIQUID DETERGENT | 3,1 |
| 2 | COCONUT MILK | 2,8 |
| 3 | MILK POWDER-KIDS | 1,9 |
| 4 | BABY DIAPERS | 1,7 |
| 5 | DISH WASH | 1,6 |
| 6 | CHOC/NUT SPREAD | 1,4 |
| 7 | BUTTER | 1,4 |
| 8 | RTD TEA | 1,2 |
| 9 | INSECTICIDE | 1,2 |
| 10 | LIQUID SOAP | 1,2 |

Source: MAT Q214 vs YA Category Penetration%

## BASKET TRENDS – %Value Change MAT Q2.14 vs. YA

| | |
|---|---|
| FMCG Total | -1,8% |
| Food | -4,0% |
| Beverages | -3,8% |
| Dairy Products | 1,7% |
| Home Care | 0,0% |
| Personal Care | 1,7% |

## MAT Q2.14 / MAT Q2.13 / MAT Q2.12

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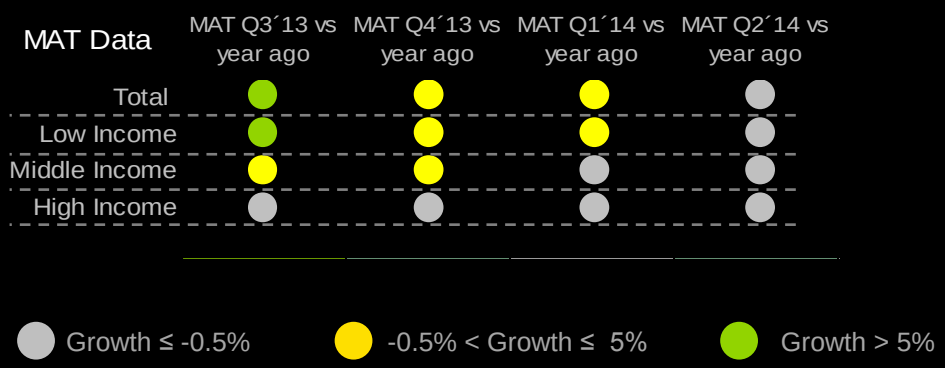
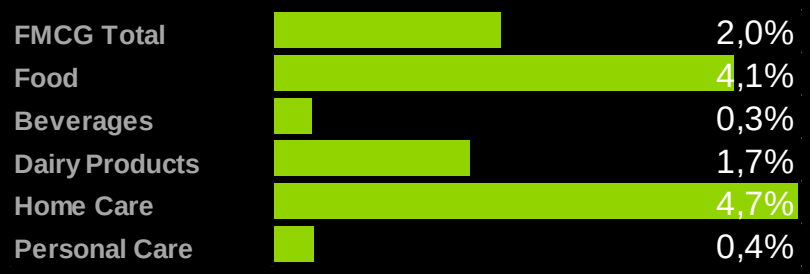



## TOP 10 RECRUITERS IN PHILIPPINES (by penetration points growth)

| Rank 2014 | Categories | Additional Penetration points |
|---|---|---|
| 1 | RTE Breakfast Cereal | 6,7 |
| 2 | Baby Wipes/Wet Tissue | 3,5 |
| 3 | Marie | 3,0 |
| 4 | Cookies | 2,9 |
| 5 | Toilet Cleaner | 2,4 |
| 6 | Wafer | 2,4 |
| 7 | Cultured Milk | 2,0 |
| 8 | Lip Cosmetics | 2,0 |
| 9 | Dishwash | 1,8 |
| 10 | Mixed biscuits | 1,8 |

Source: MAT Q214 vs YA Category Penetration%

## BASKET TRENDS – %Value Change MAT Q2.14 vs. YA

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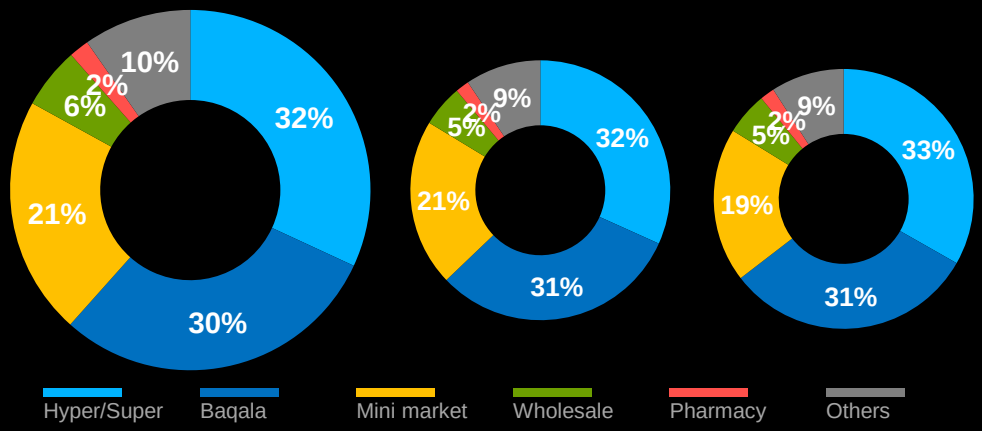
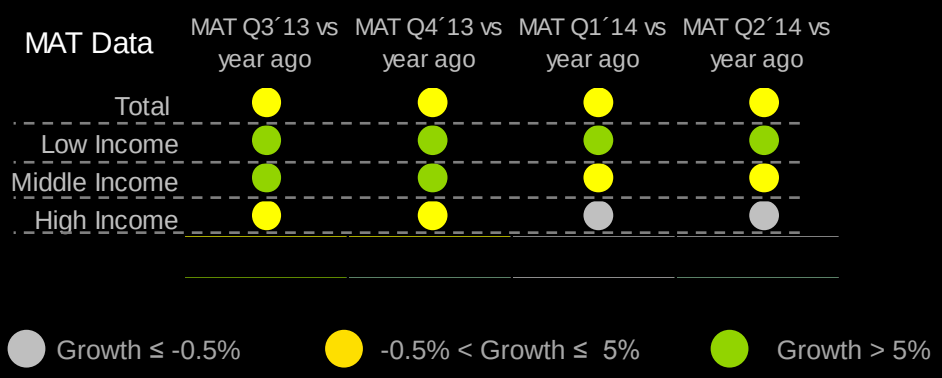



## %CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

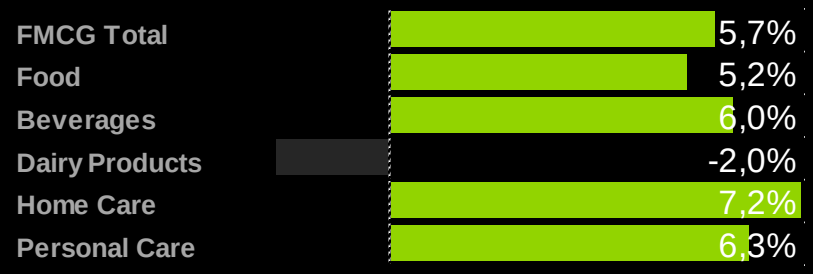



## TOP RECRUITERS IN KSA (by penetration points growth)

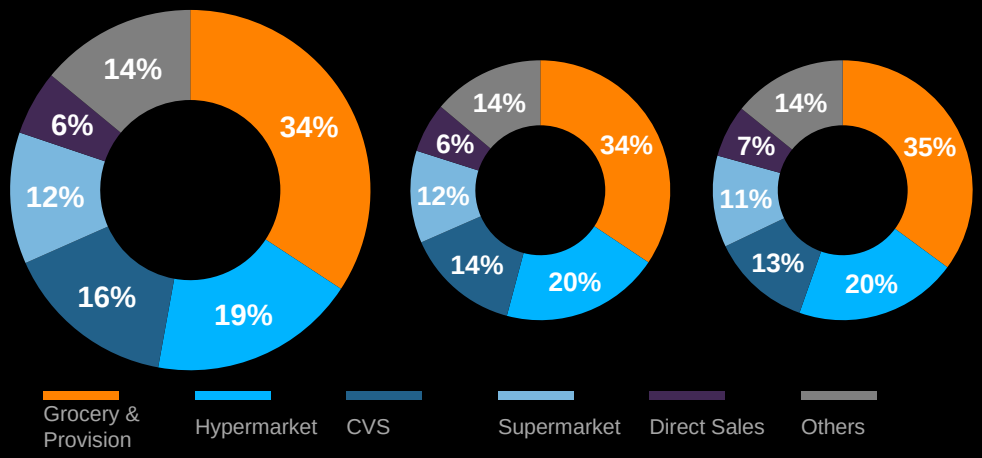
| Rank 2014 | Categories | Additional Penetration points |
|---|---|---|
| 1 | SOUPS | 4.6 |
| 2 | CONDENSED MILK | 3.8 |
| 3 | BREAKFAST CEREALS | 2.9 |
| 4 | BODY DEODORANT | 2.3 |
| 5 | SKIN CREAMS | 2.2 |
| 6 | DISINFECTANTS | 1.7 |
| 7 | LABNEH | 1.3 |
| 8 | SHAMPOOS | 0.9 |
| 9 | COOKING CREAM | 0.9 |
| 10 | SPREADS | 0.8 |

Source: MAT Q214 vs YA Category Penetration%

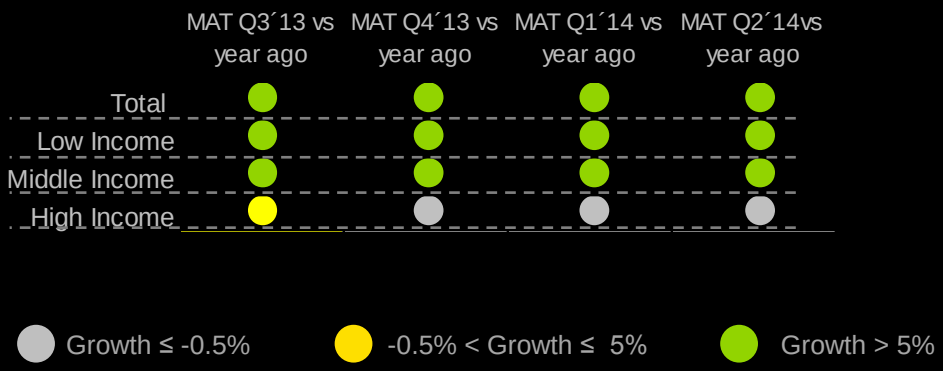
## BASKET TRENDS – %Value Change MAT Q2.14 vs. YA




## MAT Q2.14 / MAT Q2.13 / MAT Q2.12




## %CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

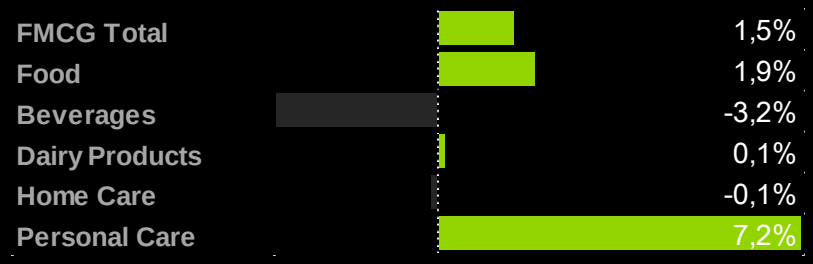



## TOP 10 RECRUITERS IN THAILAND (by penetration points growth)

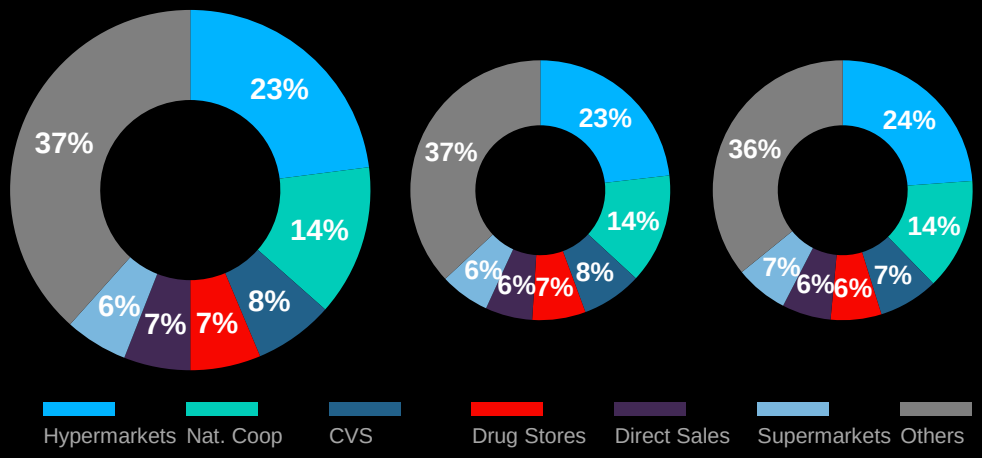
| Rank 2014 | Categories | Additional Penetration points |
|---|---|---|
| 1 | Coconut Juice | 4,4 |
| 2 | Hand&Body Moist | 4 |
| 3 | Liquid Detergent | 3,3 |
| 4 | Bottle Water | 3 |
| 5 | Juice 100 % | 2,5 |
| 6 | RTD Coffee | 2,4 |
| 7 | Facial Tissue | 2,3 |
| 8 | Fish Sauce | 2,2 |
| 9 | Rice | 2,1 |
| 10 | Powder Health Tonic | 1,8 |

Source: MAT Q214 vs YA Category Penetration%

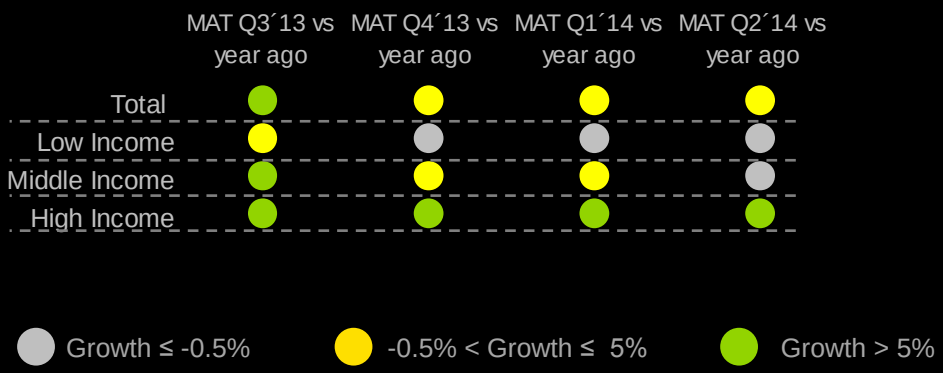
## BASKET TRENDS – %Value Change MAT Q2.14 vs. YA




## MAT Q2.14 / MAT Q2.13 / MAT Q2.12




## %CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

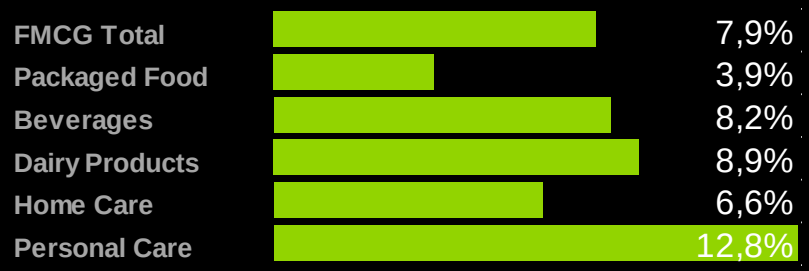


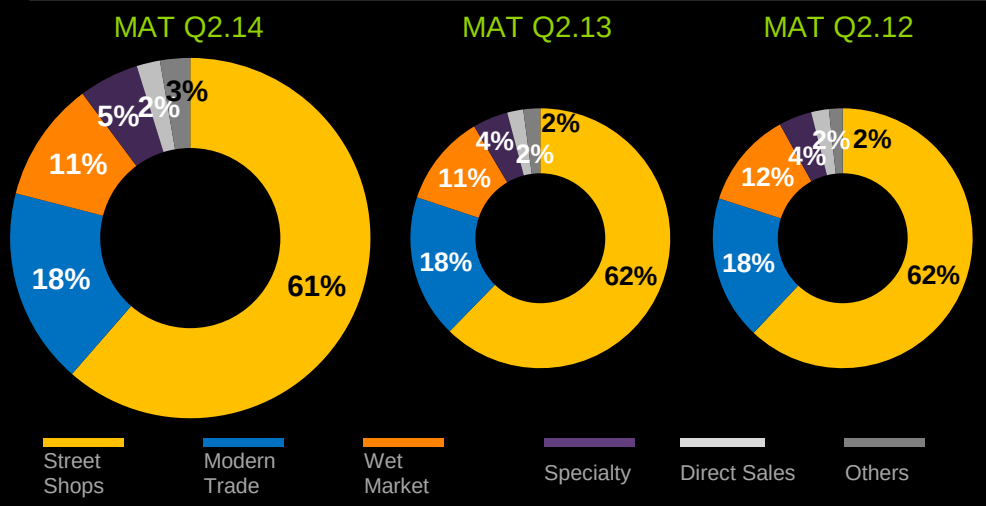

## TOP 10 FMCG RECRUITERS IN TAIWAN (by penetration point growth)

| Rank 2014 | Categories | Additional Penetration points |
|---|---|---|
| 1 | Packaged Water | 4% |
| 2 | Wet Tissue | 3% |
| 3 | Facial Skincare | 3% |
| 4 | Body care | 3% |
| 5 | Make Up | 2% |
| 6 | Stain Removers | 1% |
| 7 | Hair Colorant | 1% |
| 8 | Shampoo | 1% |
| 9 | Wine / Champagne | 1% |
| 10 | Coffee | 1% |

Source: MAT Q214 vs YA Category Penetration%

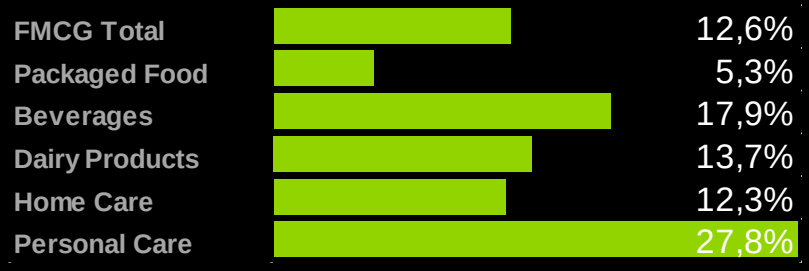
## BASKET TRENDS – %Value Change MAT Q2.14 vs. YA URBAN 4 CITIES




Note: Data Urban 4 cities

## BASKET TRENDS – %Value Change MAT Q2.14 vs. YA RURAL




Note: Data excluding gift

## TOP 10 RECRUITERS IN VIETNAM (by penetration points growth)

| Rank 2014 | Categories | Additional Penetration points |
|---|---|---|
| 1 | Liquid Handwash | 7% |
| 2 | Functional DKY | 7% |
| 3 | Sausage | 5% |
| 4 | Chocolate | 5% |
| 5 | RTD Tea | 4% |
| 6 | Mineral Water | 4% |
| 7 | Liquid Detergent | 4% |
| 8 | Floor Cleaner | 4% |
| 9 | Ketchup | 4% |
| 10 | Tonic Food Drink | 4% |

Source: Urban Vietnam / MAT Q214 vs YA Category Pen%

# ASIA | KEY INDICATORS 2014

Back Homepage | Back to Summary Asia

| | CN | IN | ID | KR | MY |
|---|---|---|---|---|---|
| GDP Growth in 2014 | **7,6%** | **5,5%** | **5,3%** | **2,8%** | **4,9%** |
| 2014 Inflation (CPI %) | **2,6%** | **6,9%** | **6,1%** | **1,8%** | **3,3%** |
| vg. Household Spend per year on FMCG* | **1.214 USD** | **228 USD*** | **475 USD** | **1.238 USD** | **969 USD** |
| Annual Purchase frequency (FMCG) | **86 times** | **127 times** | **414 times** | **99 times** | **108 times** |
| Average Household Size | **2.8 members** | **5.3 members** | **4 members** | **3,0 members** | **4.5 members** |

| | PH | KSA | TW | TH | VN |
|---|---|---|---|---|---|
| GDP Growth in 2014 | **6,6%** | **4,1%** | **3,0%** | **2,5%** | **5,5%** |
| 2014 Inflation (CPI %) | **4,0%** | **2,7%** | **2,1%** | **4,1%** | **7,0%** |
| vg. Household Spend per year on FMCG* | **627 USD** | **2.130 USD** | **1.422 USD** | **624 USD** | **692 USD** |
| Annual Purchase frequency (FMCG) | **354 times** | **210 times** | **100 times** | **216 times** | **166 times** |
| Average Household Size | **5 members** | **5.8 members** | **2.8 members** | **3,6 members** | **4.5 members** |

Sources: IMF, National Bureau of Statistics of China, Trading economics, India Ministry of statistics & Programme Implementation, Central Statistic Bureau Indonesia, Bank of Korea, Statistics.gov.my, Department of Statistics Malaysia, Bank Negara Malaysia, www.nscb.gov.ph, National Statistical Coordination Board, NESDB, Bank of Thailand, General Statistics Office of Vietnam, Saudi Arabian Monetary Agency, Taiwan Department of Statistics, www.imf.org, http://www.focus-economics.com
*Notice that each country FMCG includes all the categories tracked locally, which are not necessarily the same across Asia. In India, limited number of categories reported due to KWP not recording price)

# CONSUMER INSIGHTS

## LATAM 2014

Q2 2014

KANTAR WORLDPANEL High definition inspiration

# Q2 2014 | SUMMARY LATAM

Back to the beginning

#SlowRhythm[1] The level of economic activity in Latin America continues to grow at a slow pace in 2014.

#NarcissisticRegion Personal Care is the basket with the highest growth for the second quarter in the region

#ModeratedGrowth[1] A regional growth of 2.0% is projected for 2014 according to IMF

#HalfCategoriesRising 48% of categories in Latam show a volume growth in the second quarter of the year.

(1) Source: IMFI

% Vol Change FMCG – MAT Q2 2014 vs MAT Q2 2013

| | ARG | BOL | BRA | CAM | CHI | COL | ECU | MEX | PER | VEN |
|---|---|---|---|---|---|---|---|---|---|---|
| Total FMCG | -0,5% < Growth ≤ 5% | -0,5% < Growth ≤ 5% | Growth > 5% | -0,5% < Growth ≤ 5% | Growth ≤ -0,5% | -0,5% < Growth ≤ 5% | -0,5% < Growth ≤ 5% | -0,5% < Growth ≤ 5% | -0,5% < Growth ≤ 5% | Growth ≤ -0,5% |
| Foods | -0,5% < Growth ≤ 5% | Growth ≤ -0,5% | Growth > 5% | Growth ≤ -0,5% | Growth ≤ -0,5% | Growth > 5% | Growth ≤ -0,5% | -0,5% < Growth ≤ 5% | Growth ≤ -0,5% | Growth ≤ -0,5% |
| Beverages | -0,5% < Growth ≤ 5% | Growth > 5% | -0,5% < Growth ≤ 5% | -0,5% < Growth ≤ 5% | Growth ≤ -0,5% | Growth > 5% | Growth ≤ -0,5% | Growth ≤ -0,5% | Growth ≤ -0,5% | -0,5% < Growth ≤ 5% |
| Dairy Products | Growth ≤ -0,5% | -0,5% < Growth ≤ 5% | Growth > 5% | -0,5% < Growth ≤ 5% | Growth ≤ -0,5% | Growth > 5% | Growth ≤ -0,5% | Growth ≤ -0,5% | Growth ≤ -0,5% | Growth ≤ -0,5% |
| Home Care | Growth ≤ -0,5% | -0,5% < Growth ≤ 5% | Growth > 5% | Growth ≤ -0,5% | -0,5% < Growth ≤ 5% | Growth > 5% | -0,5% < Growth ≤ 5% | -0,5% < Growth ≤ 5% | Growth ≤ -0,5% | Growth > 5% |
| Personal Care | Growth ≤ -0,5% | -0,5% < Growth ≤ 5% | Growth > 5% | -0,5% < Growth ≤ 5% | Growth ≤ -0,5% | Growth ≤ -0,5% | Growth > 5% | -0,5% < Growth ≤ 5% | Growth > 5% | Growth ≤ -0,5% |

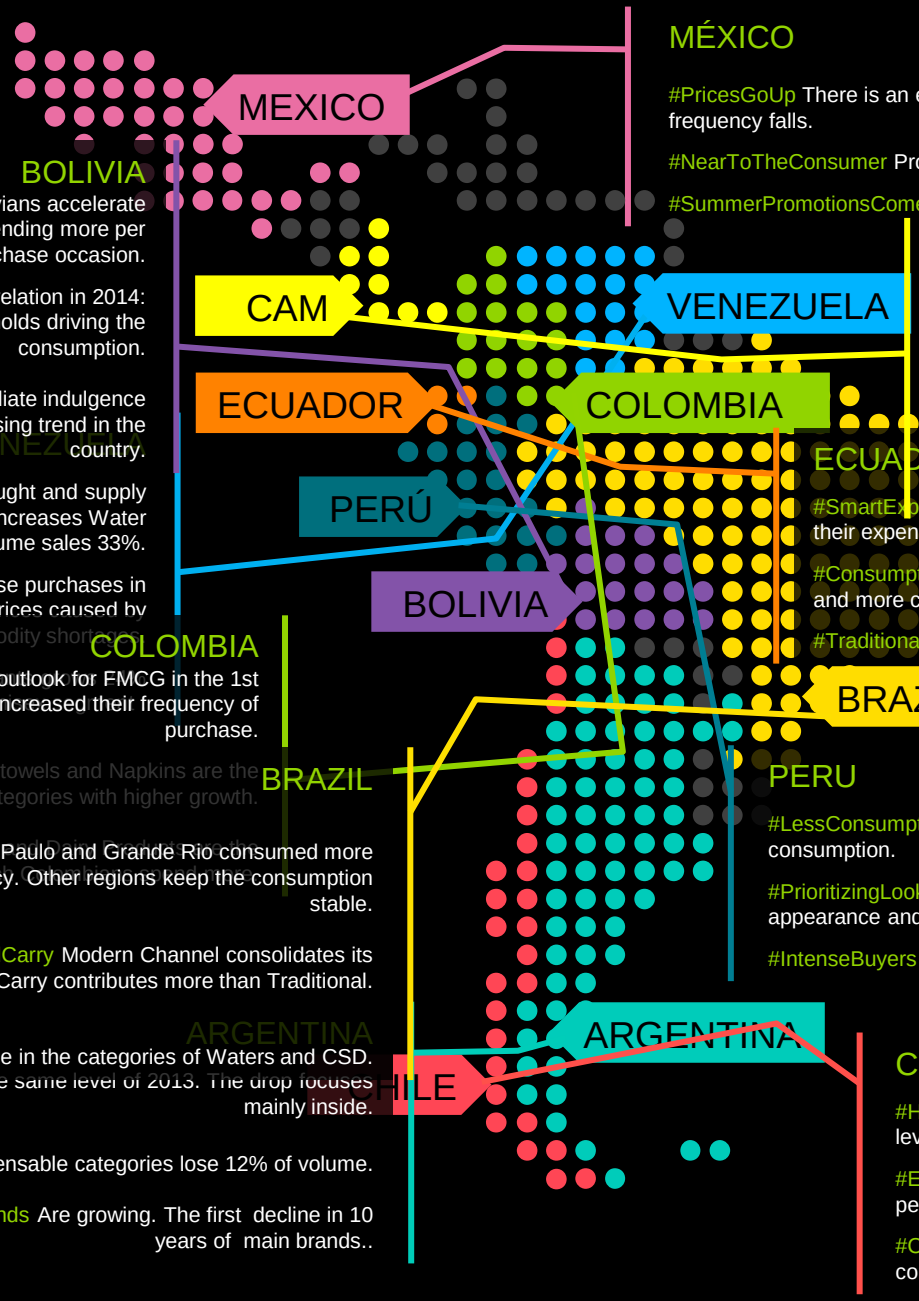
Growth ≤ -0,5% | -0,5% < Growth ≤ 5% | Growth > 5%

(1) In some countries this basquet is tracked separately form Food and Beverages; it was made for CI LatAm

# LATAM IN 10 CLIKS

Click on each country to display or hide Insights

Back to the beginning




## MÉXICO

#PricesGoUp There is an evident increase in prices in Q2, so the ticket grows and frequency falls.

#NearToTheConsumer Proximity channels are growing for most of the baskets.

#SummerPromotionsComeEarly But do not support Supermarkets growth.

## CENTRAL AMERICA

#CentralAmericansMoreModerated The basket increases +1%, however Costa Rica and Guatemala didn't manage to recover in the 1st semester of the year.

#ThirstyInCAM Good performance in beverages, specially in water and CSD. Also dairy, impulsed by milk.

#KeyBeingPresentInTraditional Informal channels showing growth, specially in households of SEL ABC+ and D.

#SmartExpenditure For Q2'14 households became more assertive in their expenditures.

#ConsumptionTrends More specialized households, more practical, and more concerned about their health.

#TraditionalTradeReactivates Reactivation of this channel in the states.

## BOLIVIA

#PurchaseIntensity Bolivians accelerate consumption vs. 2013, spending more per purchase occasion.

#ModernTrade Channel of revelation in 2014: more trips and more households driving the consumption.

#LookinForPracticality Immediate indulgence and easy-to-cook food are a rising trend in the country.

#QuenchingThirst Due to drought and supply problems to households, increases Water volume sales 33%.

#InformalChannelsGrow Increase purchases in those channel despite high prices caused by commodity shortages.

## COLOMBIA

#RiseOfFrequency Positive outlook for FMCG in the 1st semester of 2014, households increased their frequency of purchase.

#CleanKitchen Kitchen towels and Napkins are the categories with higher growth.

#ThirstyCountryBeverages Beverages and Dairy products are the categories with higher growth in volume and value.

## BRAZIL

#FeaturedMetropolis São Paulo and Grande Rio consumed more volume without losing frequency. Other regions keep the consumption stable.

#ModernChannel&CashAndCarry Modern Channel consolidates its growth and Cash&Carry contributes more than Traditional.

#BeveragesFall Heavy decrease in the categories of Waters and CSD.

#ConsumptionDrops Q2 at the same level of 2013. The drop focuses mainly inside.

#ValuedCategoriesAffected Dispensable categories lose 12% of volume.

#PrivateLabelsAndLowPriceBrands Are growing. The first decline in 10 years of main brands..

## PERU

#LessConsumption Households in Peru remain conservative in their consumption.

#PrioritizingLookingGood Households refuse to save in their appearance and personal care basket keeps growing.

#IntenseBuyers Households doing less purchases but more intense.

## CHILE

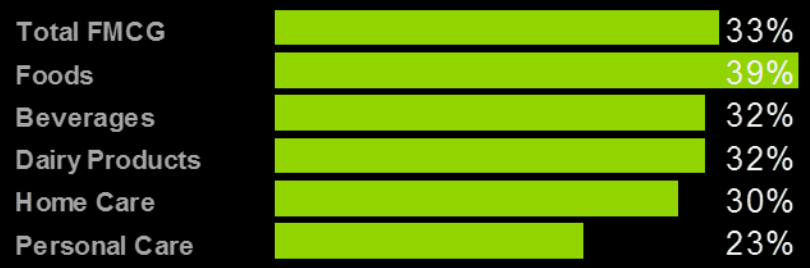
#HigherTicket Transversely reflected in different socioeconomic levels .

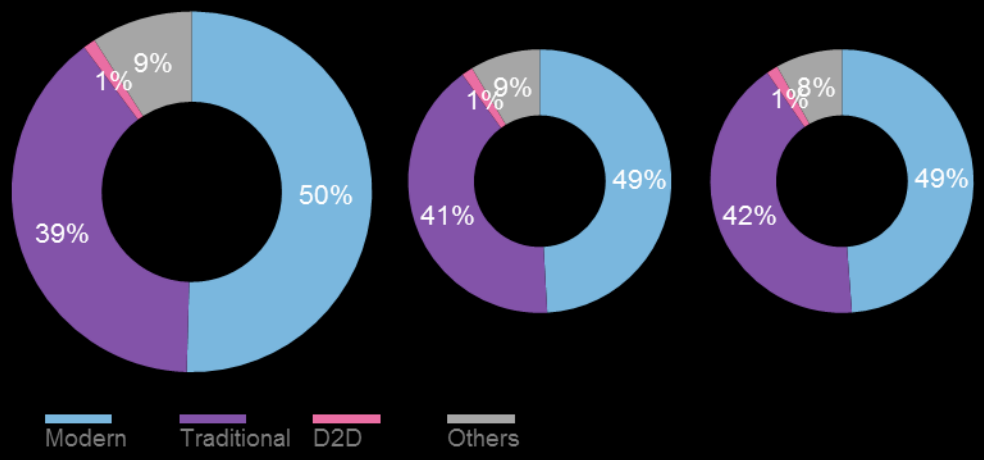
#EfficientPurchases The trend continues towards a higher volume per occasion.

#ContractionInCategories 70% of categories decreased consumption and 38% expenditure. (MAT to June 2014)

Click on the country in order to open the information, click againg for closing it.

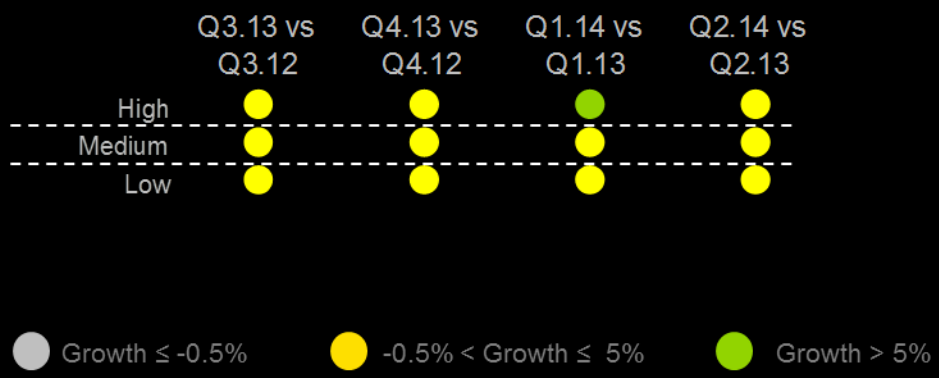
## BASKET TRENDS - VAL MAT Q2.14 vs. MAT Q2.13




## SEL – VOL VARIATIONS

MAT DATA

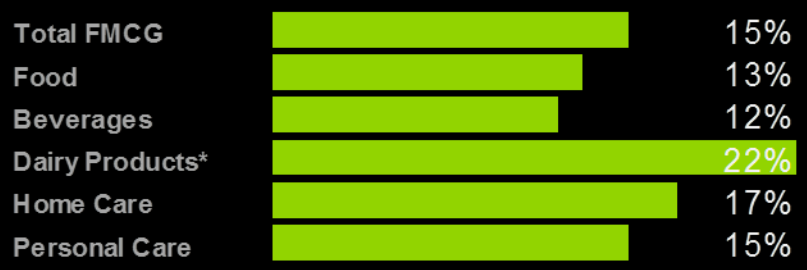



## TOP 10 RECRUITERS IN ARGENTINA (by penetration points of growth)

| Rank Q2 2014 | Category | MOV Q2.14 vs MOV Q2.13 |
|---|---|---|
| 1 | JUICES READY TO DRINK | 3.8 |
| 2 | GROUND COFFEE | 1.4 |
| 3 | LIQUID MILK FOR KIDS | 1.3 |
| 4 | FROZEN VEGETABLES & CHIPS | 1.3 |
| 5 | SEASONINGS | 0.6 |
| 6 | COCOA POWDER | 0.4 |
| 7 | BEER | 0.2 |
| 8 | KITCHEN TOWELS | 0.2 |
| 9 | SOY JUICES | 0.2 |
| 10 | SHAMPOO | 0.1 |

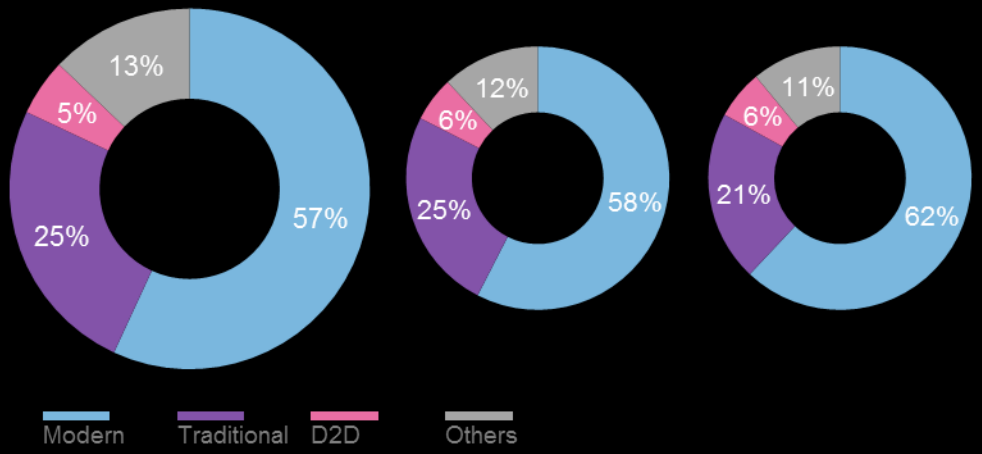
Source: MAT Q2 vs YA Category Penetration%

## BASKET TRENDS - VAL MAT Q2.14 vs. MAT Q2.13



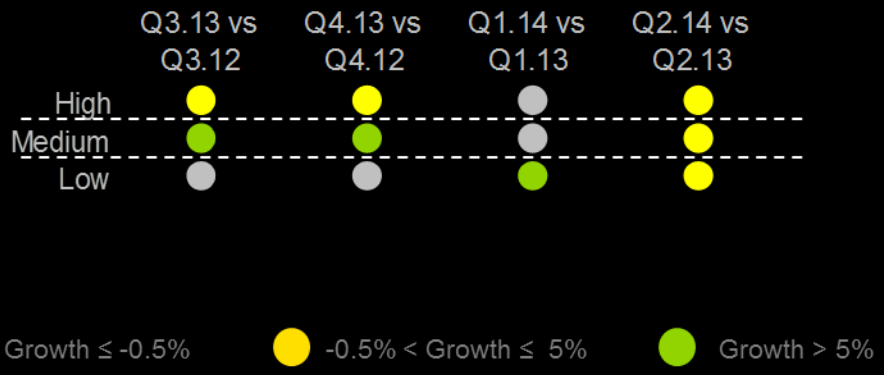

* Basket specially built for CI LatAm; Brazil typically measures Dairy within Foods and Beverages

## MAT Q2.14 / MAT Q2.13 / MAT Q2.12




## SEL – VOL VARIATIONS

MAT DATA

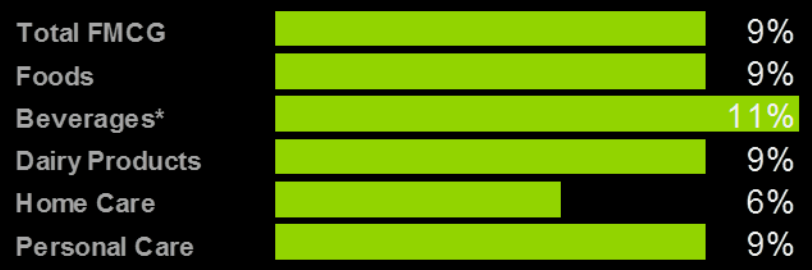



## TOP 10 RECRUITERS IN BRAZIL (by penetration points of growth)

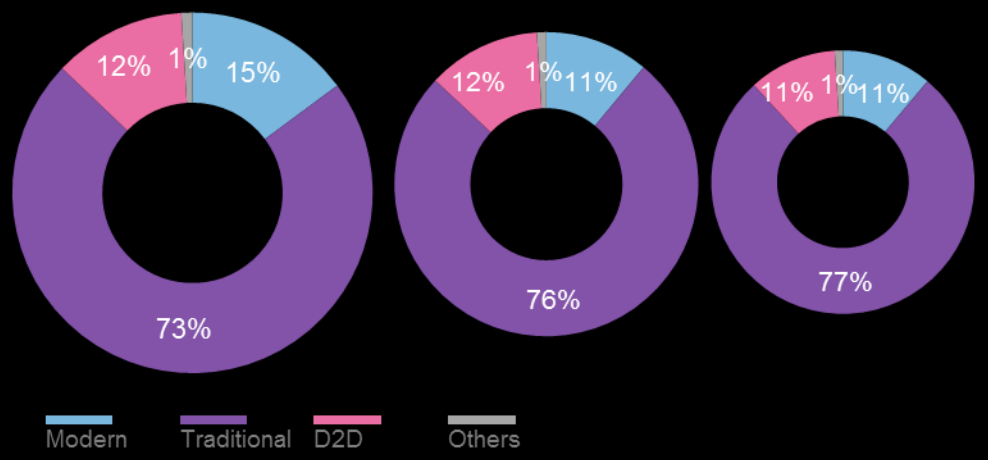
| Rank Q2 2014 | Category | MOV Q2.14 vs MOV Q2.13 |
|---|---|---|
| 1 | JUICE READY TO DRINK | 5.9 |
| 2 | LAUNDRY DETERGENT | 4.6 |
| 3 | SLICED BREAD | 4.5 |
| 4 | ICE CREAM | 4.0 |
| 5 | MINERAL WATER | 3.7 |
| 6 | CEREAL | 2.8 |
| 7 | MOUTHWASHERS | 2.6 |
| 8 | FROZEN CHIPS | 2.3 |
| 9 | AIR FRESHENERS | 2.0 |
| 10 | PET FOOD | 1.9 |

Source: MAT Q2 vs YA Category Penetration%

## BASKET TRENDS - VAL MAT Q2.14 vs. MAT Q2.13

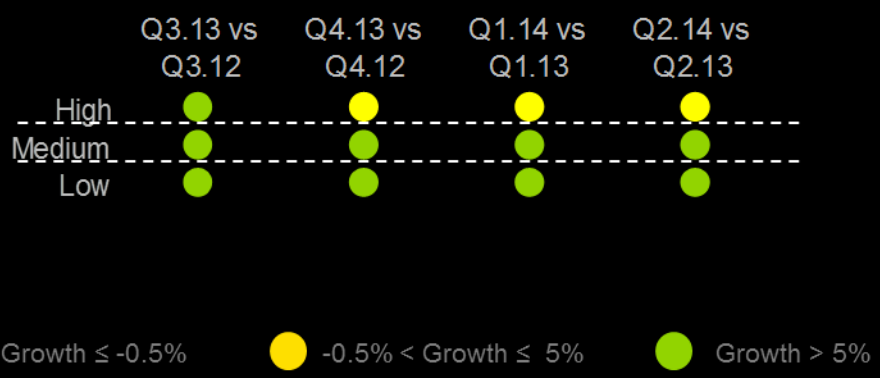



* Basket specially built for CI LatAm; Bolivia normally reports Beverages separated into Refreshing and Nutritional




## SEL – VOL VARIATIONS

MAT DATA

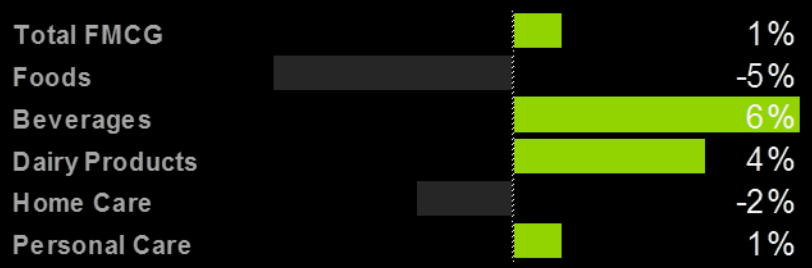



## TOP 10 RECRUITERS IN BOLIVIA (by penetration points of growth)

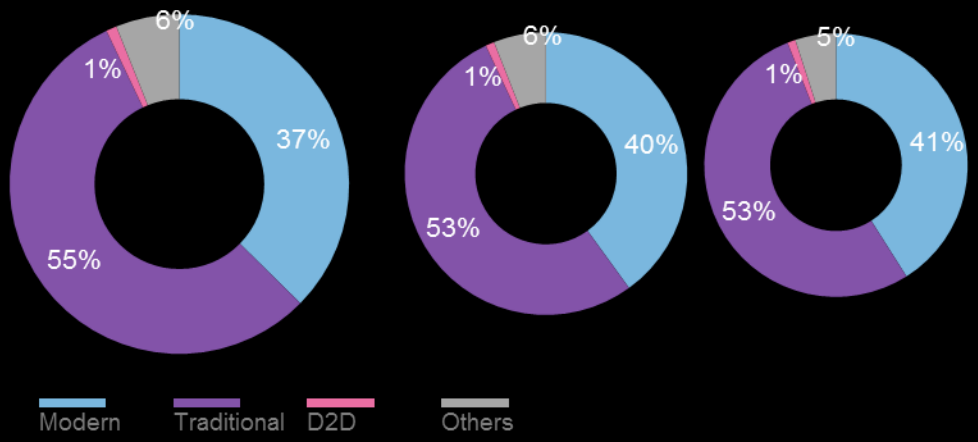
| Rank Q2 2014 | Category | MOV Q2.14 vs MOV Q2.13 |
|---|---|---|
| 1 | INSTANT COFFEE | 5.1 |
| 2 | WATER | 4.7 |
| 3 | PAPER TOWELS | 3.6 |
| 4 | JELLY | 2.9 |
| 5 | CONDENSED MILK | 2.8 |
| 6 | HAND DISH | 2.4 |
| 7 | DEODORANTS | 2.0 |
| 8 | HOT SAUCES | 1.4 |
| 9 | TEA | 1.1 |
| 10 | FRAGRANCES | 1.1 |

Source: MAT Q2 vs YA Category Penetration%

## BASKET TRENDS - VAL MAT Q2.14 vs. MAT Q2.13

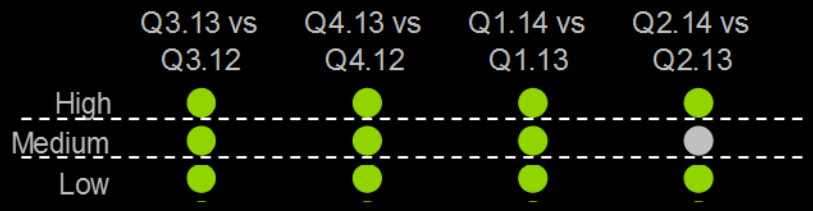



## MAT Q2.14 / MAT Q2.13 / MAT Q2.12




## SEL – VOL VARIATIONS

MAT DATA



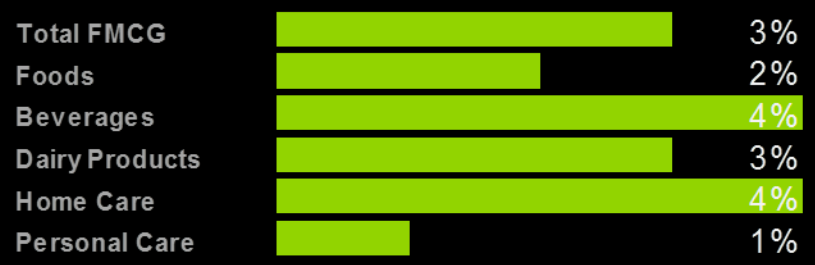

Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

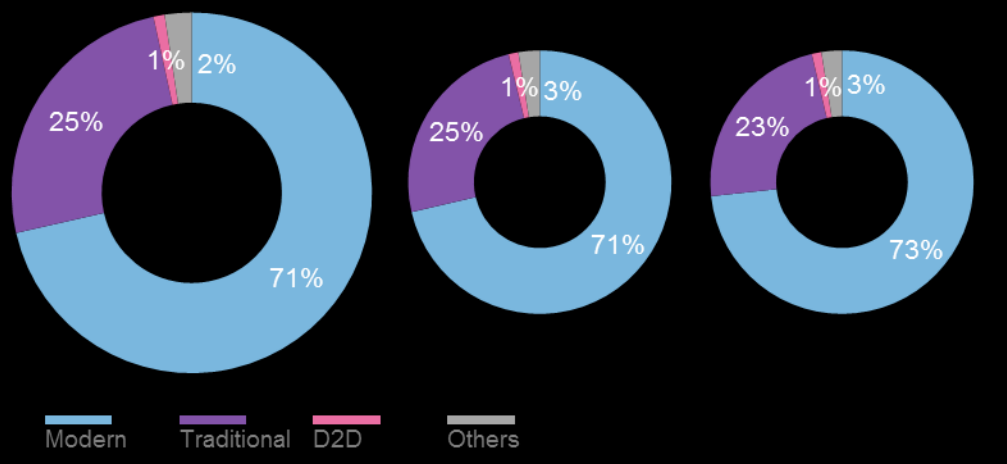
## TOP 10 RECRUITERS IN CAM (by penetration points of growth)

| Rank Q2 2014 | Category | MOV Q2.14 vs MOV Q2.13 |
|---|---|---|
| 1 | POWDERED SOY MILK | 1.6 |
| 2 | CONDENSED MILK | 1.3 |
| 3 | INSTANT COFFEE | 0.8 |
| 4 | NECTARS | 0.7 |
| 5 | SLICED BREAD | 0.6 |
| 6 | DEODORANTS | 0.4 |
| 7 | CSD | 0.2 |
| 8 | REFRESH BEVERAGES | 0.2 |
| 9 | | |
| 10 | | |

Source: MAT Q2 vs YA Category Penetration%

## BASKET TRENDS - VAL MAT Q2.14 vs. MAT Q2.13

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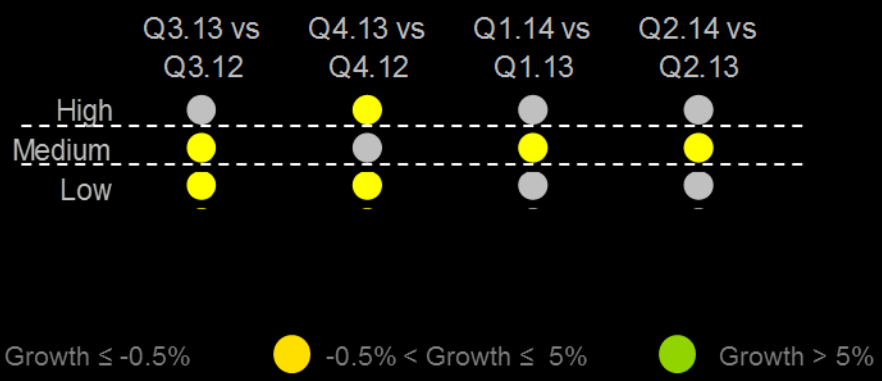
MAT DATA



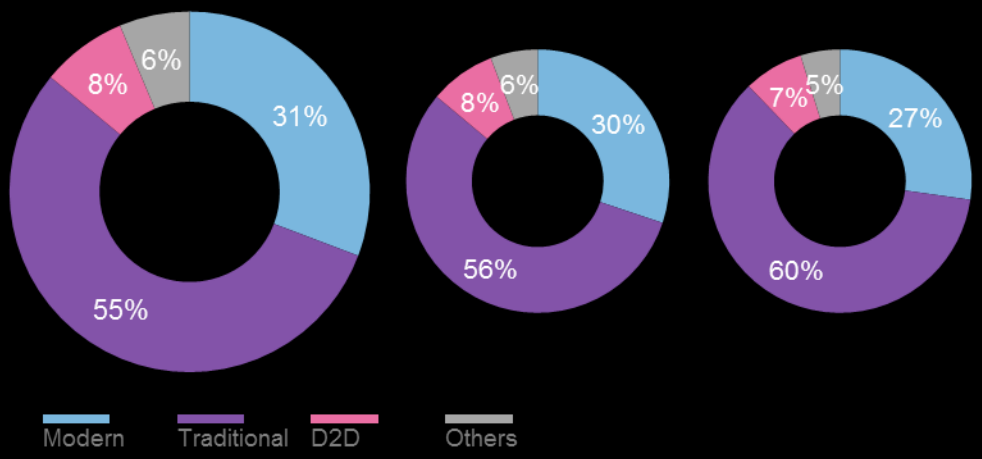

## TOP 10 RECRUITERS IN CHILE (by penetration points of growth)

| Rank Q2 2014 | Category | MOV Q2.14 vs MOV Q2.13 |
|---|---|---|
| 1 | FEM PROTECTION | 1.5 |
| 2 | NAPKINS | 0.4 |
| 3 | SWEET COOKIES | 0.3 |
| 4 | SPAGHETTI | 0.2 |
| 5 | TOMATE SAUCE | 0.2 |
| 6 | AIR FRESHENERS | 0.1 |
| 7 | KETCHUP | 0.1 |
| 8 | YOGHURT | 0.0 |
| 9 | BUTTER | 0.0 |
| 10 | RICE | 0.0 |

Source: MAT Q2 vs YA Category Penetration%

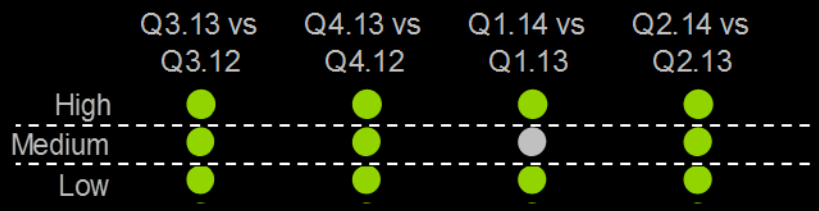
## BASKET TRENDS - VAL MAT Q2.14 vs. MAT Q2.13

*Basket specially built for CI LatAm; Colombia typically measures Dairy within Foods and Beverages




## SEL – VOL VARIATIONS

MAT DATA



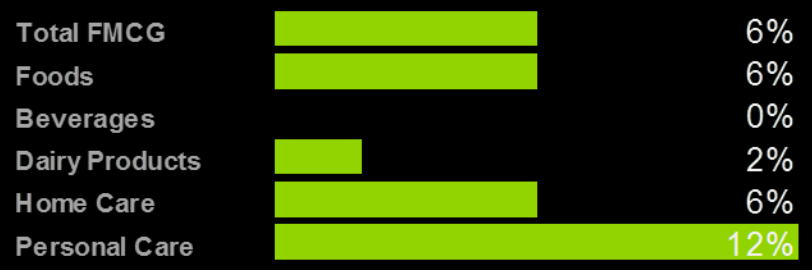

Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

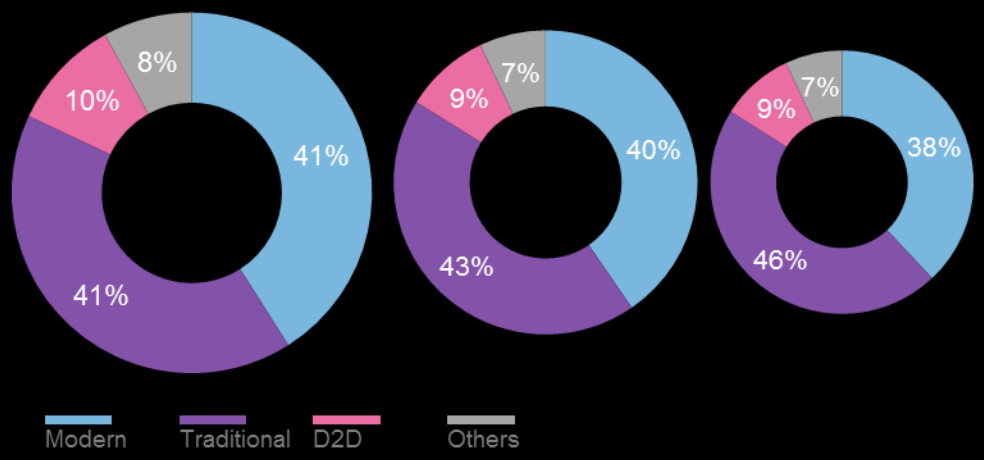
## TOP 10 RECRUITERS IN COLOMBIA (by penetration points of growth)

| Rank Q2 2014 | Category | MOV Q2.14 vs MOV Q2.13 |
|---|---|---|
| 1 | KITCHEN PAPER TOWELS | 6.3 |
| 2 | NAPKINS | 4.6 |
| 3 | DAIRY BEVERAGES | 3.3 |
| 4 | BEER | 2.9 |
| 5 | CEREAL | 2.8 |
| 6 | INDUSTRIALIZED JUICES | 2.7 |
| 7 | POWDERED SOFT DRINKS | 2.7 |
| 8 | CAT FOOD | 2.7 |
| 9 | BOTTLED WATER | 2.5 |
| 10 | FACIAL TISSUES | 2.2 |

Source: MAT Q2 vs YA Category Penetration%

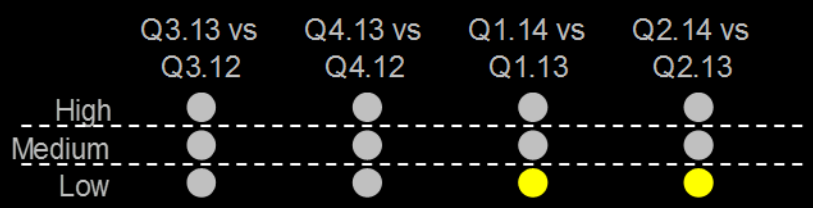
## BASKET TRENDS - VAL MAT Q2.14 vs. MAT Q2.13




## SEL – VOL VARIATIONS

MAT DATA



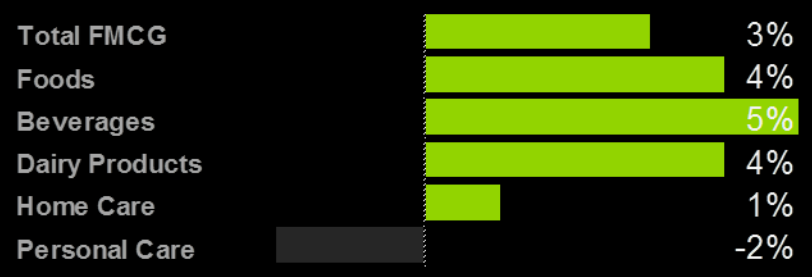

Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

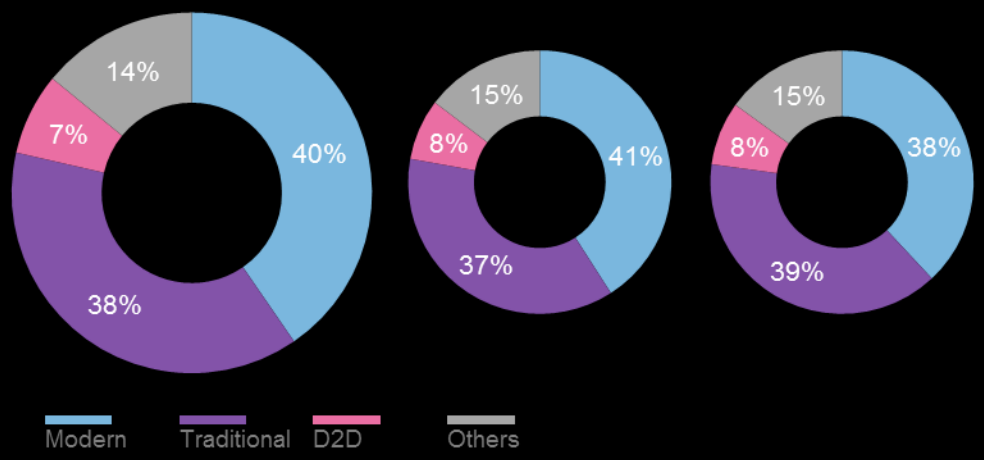
## TOP 10 RECRUITERS IN ECUADOR (by penetration points of growth)

| Rank Q2 2014 | Category | MOV Q2.14 vs MOV Q2.13 |
|---|---|---|
| 1 | POWDERED TEA | 15.3 |
| 2 | SEASONINGS | 13.6 |
| 3 | FACIAL CREAMS | 10.0 |
| 4 | CONDITIONES | 7.2 |
| 5 | HAIR STYLING PRODUCTS | 5.5 |
| 6 | POWDERED MILK | 5.0 |
| 7 | MAKEUP | 4.8 |
| 8 | STAIN REMOVERS | 4.8 |
| 9 | CHOCOLATE SPREAD | 4.3 |
| 10 | HAIR TREATMENTS | 4.2 |

Source: MAT Q2 vs YA Category Penetration%

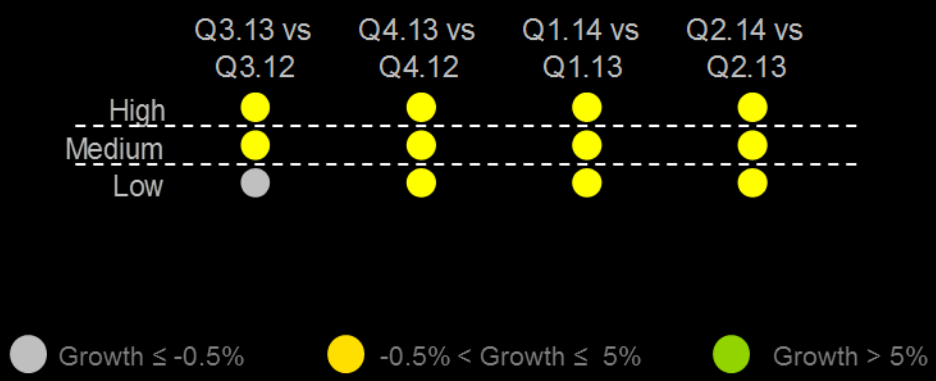
## BASKET TRENDS - VAL MAT Q2.14 vs. MAT Q2.13




## SEL – VOL VARIATIONS

MAT DATA

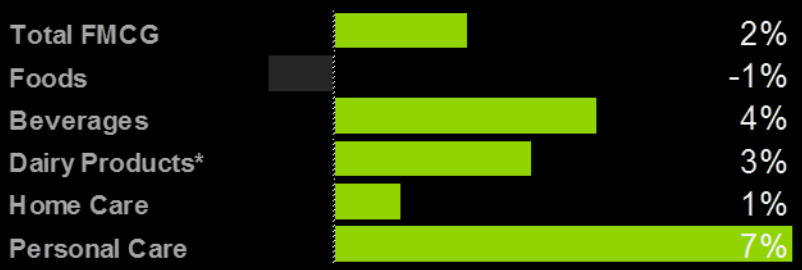



## TOP 10 RECRUITERS IN MEXICO (by penetration points of growth)

| Rank Q2 2014 | Category | MOV Q2.14 vs MOV Q2.13 |
|---|---|---|
| 1 | MAKEUP | 9.2 |
| 2 | ENERGETIC BEVERAGES | 8.1 |
| 3 | CREAM SUBSTITUTE | 6.8 |
| 4 | AIR FRESHENERS | 6.4 |
| 5 | LIQUID CONDIMENTS | 6.4 |
| 6 | SWEET CREAM | 5.1 |
| 7 | HONEY | 4.7 |
| 8 | INSECTICIDES | 4.5 |
| 9 | CONDENSED MILK | 4.3 |
| 10 | PAPER TOWELS | 4.3 |

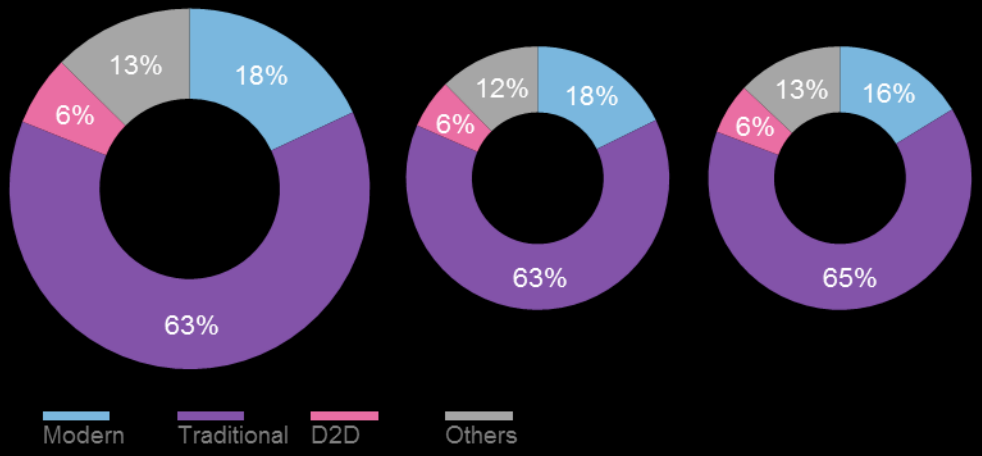
Source: MAT Q2 vs YA Category Penetration%

## BASKET TRENDS - VAL MAT Q2.14 vs. MAT Q2.13



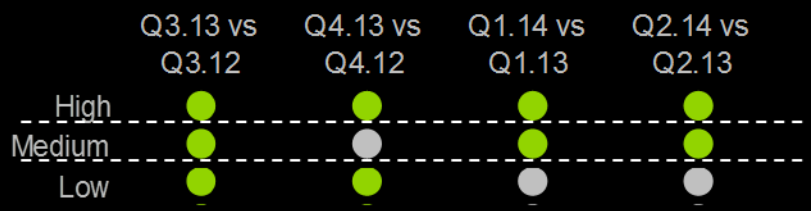

* Basket specially built for CI LatAm; Peru typically measures Dairy within Foods and Beverages

## MAT Q2.14 / MAT Q2.13 / MAT Q2.12




## SEL – VOL VARIATIONS

MAT DATA



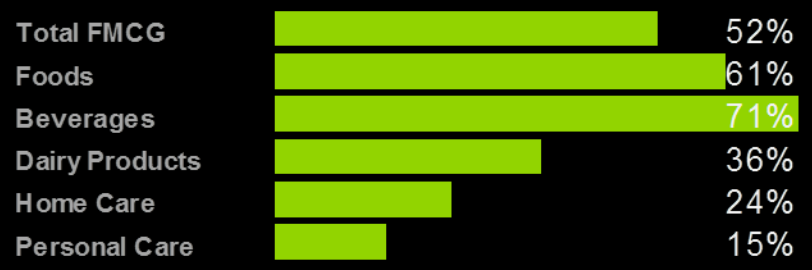

Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

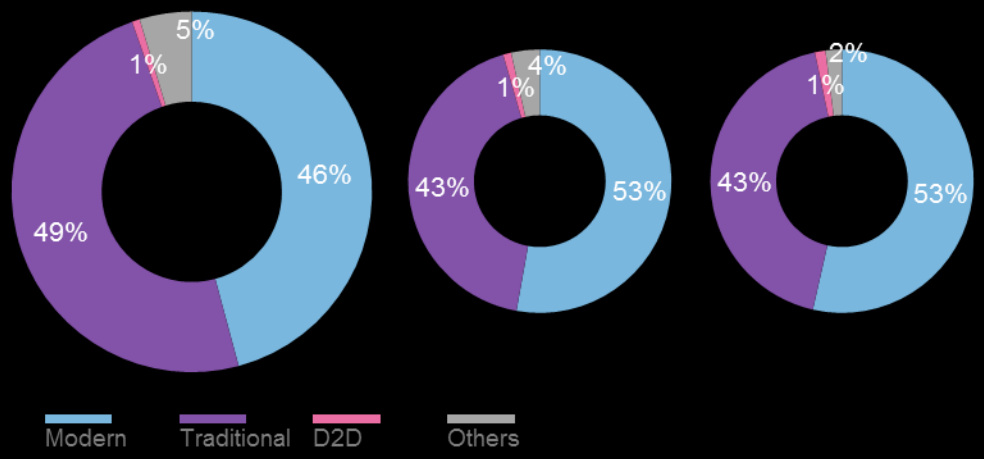
## TOP 10 RECRUITERS IN PERU (by penetration points of growth)

| Rank Q2 2014 | Category | MOV Q2.14 vs MOV Q2.13 |
|---|---|---|
| 1 | CLEANING WIPES | 6.2 |
| 2 | TOWELS / WIPES | 5.8 |
| 3 | BREADEDS | 4.6 |
| 4 | TOOTHBRUSHES | 3.7 |
| 5 | SUNSCREEN / BLOCKER | 3.4 |
| 6 | BODY CREAM | 2.9 |
| 7 | CULINARY MILK | 2.6 |
| 8 | CONDITIONERS | 1.9 |
| 9 | DIAPERS | 1.7 |
| 10 | GLOVES | 1.6 |

Source: MAT Q2 vs YA Category Penetration%

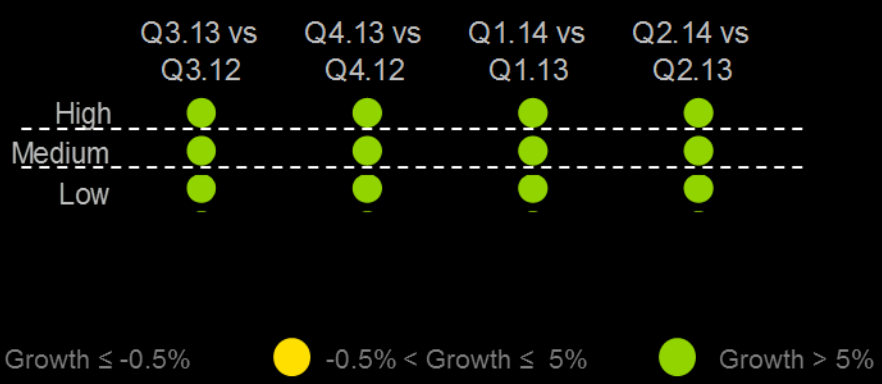
## BASKET TRENDS - VAL MAT Q2.14 vs. MAT Q2.13




## SEL – VOL VARIATIONS

MAT DATA




## TOP 10 RECRUITERS IN VENEZUELA (by penetration points of growth)

| Rank Q2 2014 | Category | MOV Q2.14 vs MOV Q2.13 |
|---|---|---|
| 1 | YOGURT | 9.6 |
| 2 | RTD LIQUID TEA | 3.4 |
| 3 | SOFTENERS | 3.2 |
| 4 | M OUTHWASHERS | 3.1 |
| 5 | COMPOTAS | 2.7 |
| 6 | PASTEURIZED JUICES | 2.3 |
| 7 | MINERAL WATER | 2.1 |
| 8 | BEER | 1.3 |
| 9 | SOUPS & CREAMS | 1.2 |
| 10 | DIAPERS | 1 |

Source: MAT Q2 vs YA Category Penetration%

# MAT Q2 2014 | KEY INDICATORS

Back to the beginning

## ARG

| | |
|---|---|
| PBI Growth 2014¹ (Estimated) | **0.5%** |
| Inflation 2014¹ (Estimated) | **39.9%** |
| Unemployment 2nd Trim 2014² (%Population) | **7.5%** |
| Purchase Frecuency T. FMCG (MOV Q2.14) | **136** |
| Average Expenditure USD (MOVQ2.14) | **1,557** |
| Average household size | **3.4** |

(1) Source: FMI Proyección 2014 (2) Source: IPC (3) Source: INDEC 2do TRIM 2014

## BRA

| | |
|---|---|
| PBI Growth Q2 2014¹ | **1.3%** |
| Inflation 2014² | **6.50%** |
| Unemployment 2014¹ (%Population) | **7.1%** |
| Purchase Frecuency T. FMCG (MOV Q2.14) | **88** |
| Average Expenditure USD (MOVQ2.14) | **1,379** |
| Average household size | **3.3** |

(1) Source: IBGE (2) Source: IBGE-IPCA U12 Jun14

## BOL

| | |
|---|---|
| PBI Growth interannual 2014¹ | **5.5%** |
| Inflation 2014² | **3.8%** |
| Unemployment Q2 2014¹ (%Population) | **3.2%** |
| Purchase Frecuency T. FMCG (MOV Q2.14) | **274** |
| Average Expenditure USD (MOVQ2.14) | **1,605** |
| Average household size | **5** |

(1) Source: Proyección CEPAL 2014 (2) Source: INE Bolivia Julio14
(3) Source: Ministerio de Economía y Finanzas Públicas 2013

## CAM

| | |
|---|---|
| PBI Growth 2014 (estimated)¹ | **3.9%** |
| Inflation 1rst quarter 2014² | **3.7%** |
| Unemployment 2014³ (%Population) | **5.8%** |
| Purchase Frecuency T. FMCG (MOV Q2.14) | **183** |
| Average Expenditure USD (MOVQ2.14) | **834** |
| Average household size | **4.5** |

(1) Source: FMI (2) Source: Consejo Monetario Centroamericano (3) Source: Trending Economics

## CHI

| | |
|---|---|
| PBI Growth 2014¹ | **2.3%** |
| Inflation 2014² | **4.3%** |
| Unemployment 2014² (%Population) | **6.5%** |
| Purchase Frecuency T. FMCG (MOV Q2.14) | **115** |
| Average Expenditure USD (MOVQ2.14) | **1,408** |
| Average household size | **4** |

(1) Source: Cooperativa (2) Source: Global rates (3) INE

# MAT Q2 2014 | KEY INDICATORS

Back to the beginning

## COL

| | |
|---|---|
| PBI Growth 2014[1] | **4.3%** |
| Inflation 2014[1] | **0.1%** |
| Unemployment 2014[1] (%Population) | **9.2%** |
| Purchase Frecuency T. FMCG (MOV Q2.14) | **225** |
| Average Expenditure USD (MOVQ2.14) | **1,434** |
| Average household size | **4.3** |

(1) Source: DANE Colombia Julio 2014 (2) Source: DANE Colombia Junio 2014

## ECU

| | |
|---|---|
| PBI Growth 2014[1] | **5.0%** |
| Inflation 2014[1] | **0.1%** |
| Unemployment 2014[2] (%Population) | **5.0%** |
| Purchase Frecuency T. FMCG (MOV Q2.14) | **259** |
| Average Expenditure USD (MOVQ2.14) | **1,451** |
| Average household size | **3.8** |

(1) Source: Banco Central del Ecuador (2) Source: INEC

## MEX

| | |
|---|---|
| PBI Growth 2014[1] | **1.6%** |
| Inflation 2014[2] | **1.1%** |
| Unemployment 2014[1] (%Population) | **4.9%** |
| Purchase Frecuency T. FMCG (MOV Q2.14) | **264** |
| Average Expenditure USD (MOVQ2.14) | **1,501** |
| Average household size | **3.9** |

(1) Source: INEGI (2) Source: Banxico

## PER

| | |
|---|---|
| PBI Growth 2014[1] | **3.3%** |
| Inflation 2014[1] | **2.1%** |
| Unemployment 2014[1] (%Population) | **5.7%** |
| Purchase Frecuency T. FMCG (MOV Q2.14) | **290** |
| Average Expenditure USD (MOVQ2.14) | **1,850** |
| Average household size | **4.3** |

(1) Source: INEI U6Junio 2014 (2) Source: INEI U3Julio2014

## VEN

| | |
|---|---|
| GDP growth 2014[1] (Estimated) | **-0.5%** |
| Inflation 2014[1] | **28.4%** |
| Unemployment April 2014[2] (%Population) | **7.1%** |
| Purchase Frecuency T. FMCG (MOV Q2.14) | **257** |
| Average Expenditure USD (MOVQ2.14) | **3,795** |
| Average household size | **3.9** |

(1) Source: BCV Mayo2014 (2) Source: INE abril 2014

# CONSUMER INSIGHTS

## LATAM 2014

We are in weekly contact with your consumers across 15 countries in Latin America.
We follow trends, combining a macro view with the finest details.

ConsumerInsights is a quarterly regional report.

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WE ARE KANTAR WORLDPANEL.