



# FMCG MONITOR

An integrated view of Indonesia FMCG market



# Dec

## 2014

#Data up to P13 2014

# executive SUMMARY

1

Indonesia's annual inflation rate (Year 2014) is 8.36%. Consumer Price Index (CPI) in December 2014 rose 2.46 % from November 2014.

The inflation in December 2014 was mainly caused by price increases of several commodities, such as gasoline, food stuff , urban transportation fare, and electricity.



2

Total value FMCG in Urban accelerated due to the price increased. The volume growth is maintained compared to last year.



While in Rural area, the growth are captured in value and volume. HHs slightly increased their (volume) consumption by 4%.

3



Floor cleaner shows an excellent growth in Urban Indonesia, both in volume and value wise. This category is able to recruit more consumers in yearly comparison, and the spending per consumer is also increasing. One of the growth driver is the enhancement by some brands in traditional trade

4



In Urban, Amongst Modern Trade channel, minimarket still contributes the most, yet, Supermarket has the role as the rising star in Urban.

Rural is still dominated by Traditional trade that grows by two digits this quarter vs. Year ago in rural. Yet, Rural consumers are continuous to rely on minimarket nowadays.

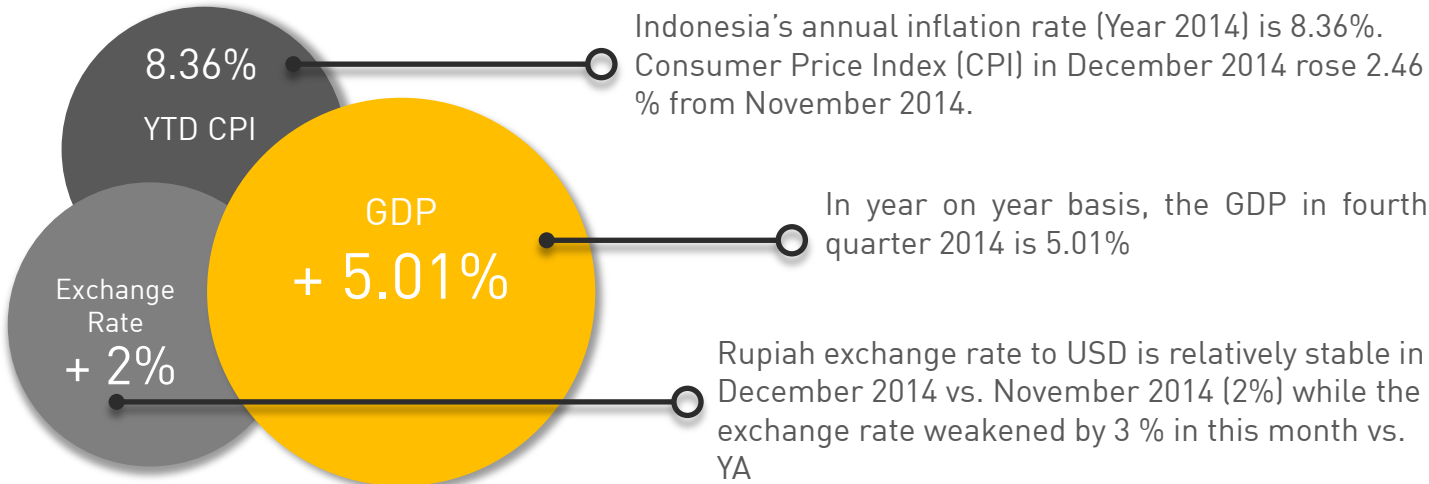
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FMCG growth are slowing down this year due to smaller volume purchased that indicated by less frequent shopping trip and higher trip size that is caused by the economic condition.

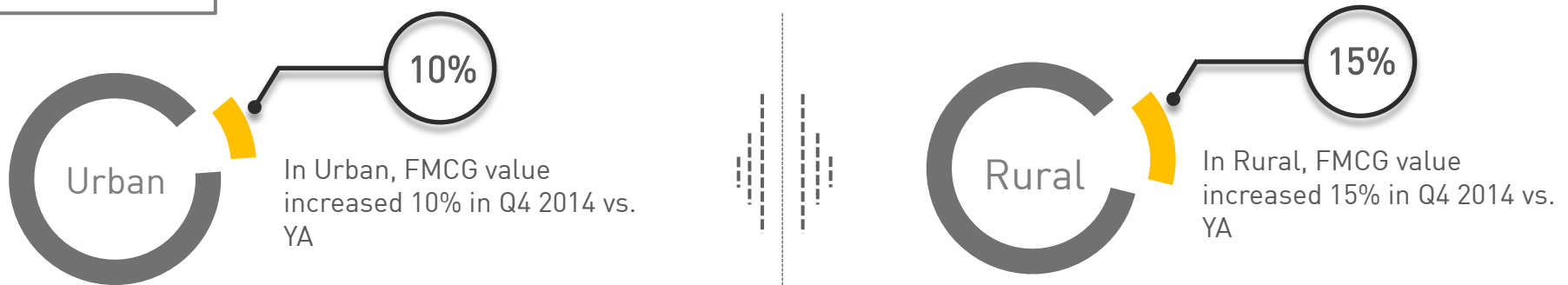
# KEY INDICATOR

## Macro Trend



Source : BPS and Bank Indonesia

## FMCG Trend



Source : Kantar Worldpanel Indonesia / Household Panel

\*FMCG is excluding rice, sugar, and fresh food

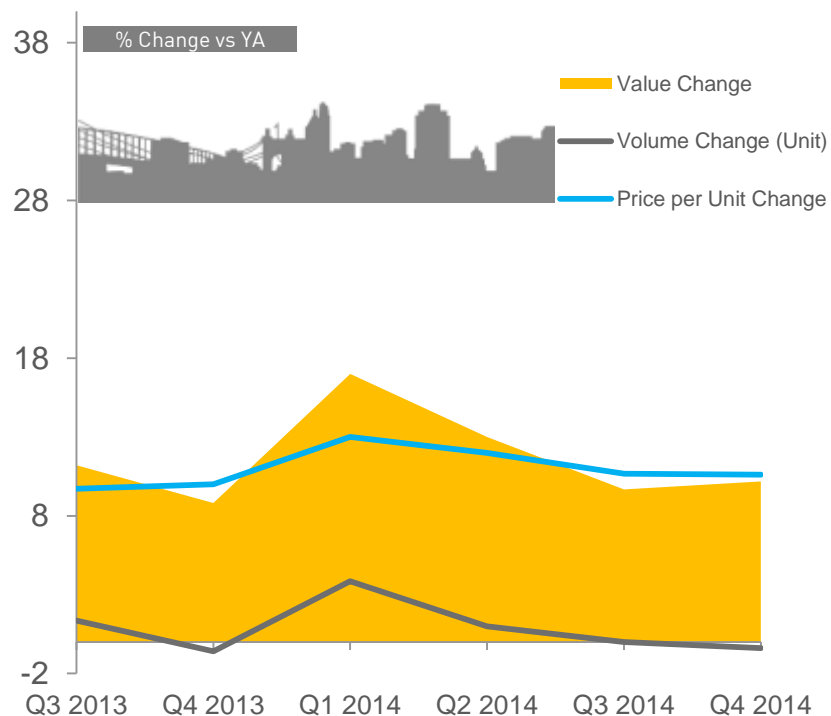


1

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

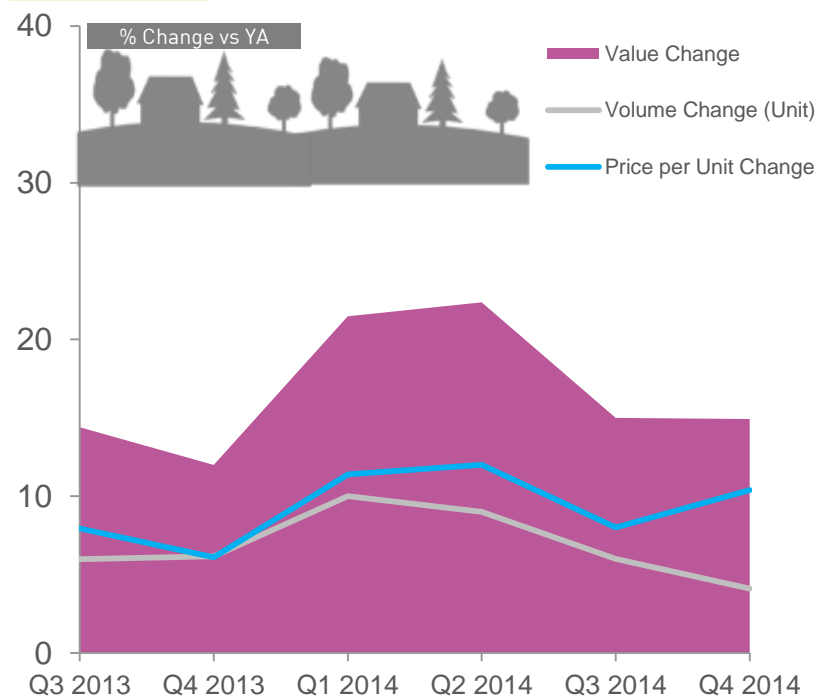
Total value FMCG in Urban accelerated due to the price increased. The volume growth is maintained compared to last year. While in Rural area, HHs slightly increased their (volume) consumption by 4%.

### Urban



Source : Kantar Worldpanel Indonesia – Household Panel – Total FMCG

### Rural



\*FMCG is excluding rice, sugar, and fresh food



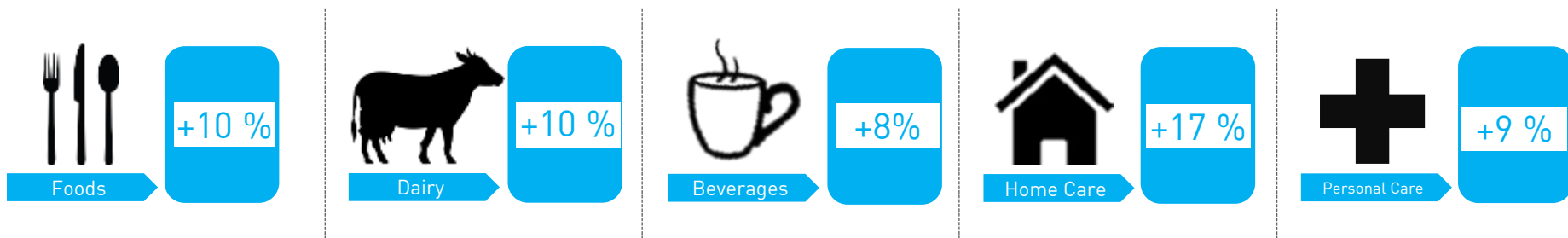
2

## FMCG SEGMENTS TRENDS – VALUE CHANGE (%)

Home care segment is growing the most in Urban (and also capturing big growth in rural). Dairy is the most growing segment in Rural.

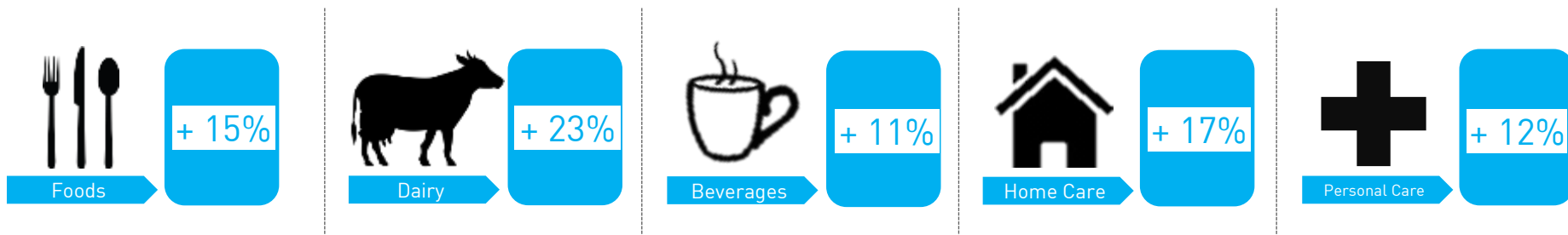
### Urban

Q4 2014 vs. YA



### Rural

Q4 2014 vs. YA



Source : Kantar Worldpanel Indonesia – Household Panel – Total FMCG

\*FMCG is excluding rice, sugar, and fresh food

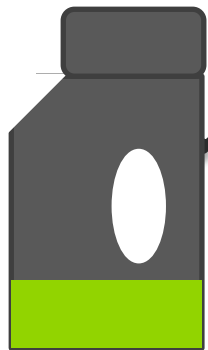


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## HOT CATEGORIES (URBAN)

Floor cleaner shows an excellent growth in Urban Indonesia, both in volume and value wise. This category is able to recruit more consumers in yearly comparison, and the spending per consumer is also increasing. One of the growth driver is the enhancement by some brands in traditional trade

### Floor Cleaner



30%

Total volume (in L)  
increase in Urban  
Indonesia  
Q4 2014 vs. YA



4 pts

Penetration increase in  
Urban Indonesia  
Q4 2014 vs. YA  
(Base : 26.5 million  
households)

Rp.

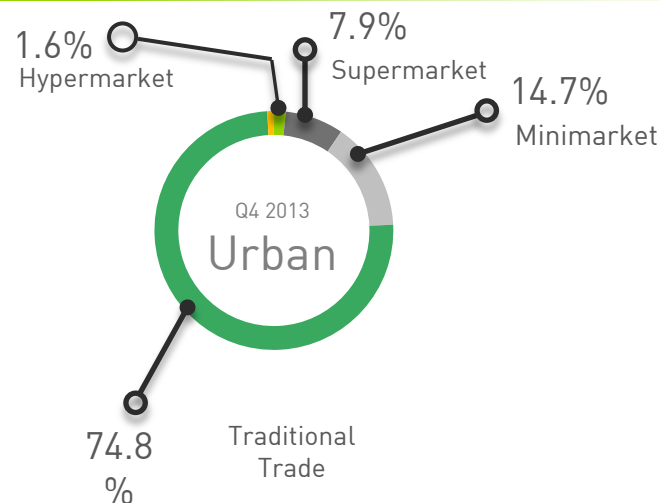
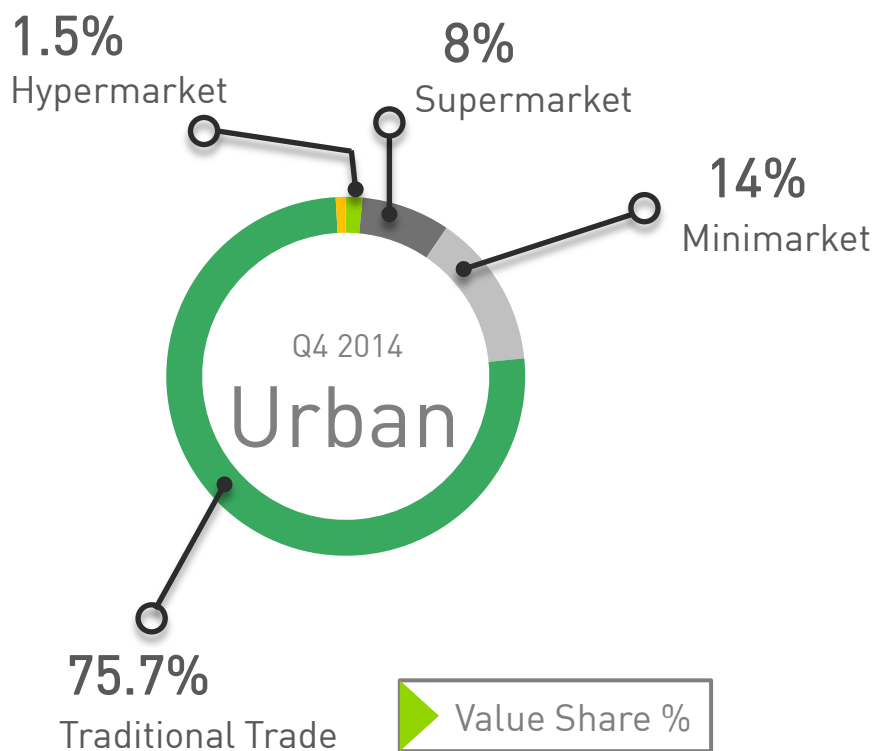
35%

The value growth increased in  
Urban Indonesia  
Q4 2014 vs. YA

4

RETAILER

## RETAILER SNAPSHOT - URBAN



Value Change %

Value Change %	Q4 2014 vs. YA
Minimarket	+5%
Hypermarket	-2%
Supermarket	+11%
Traditional Trade	+12%

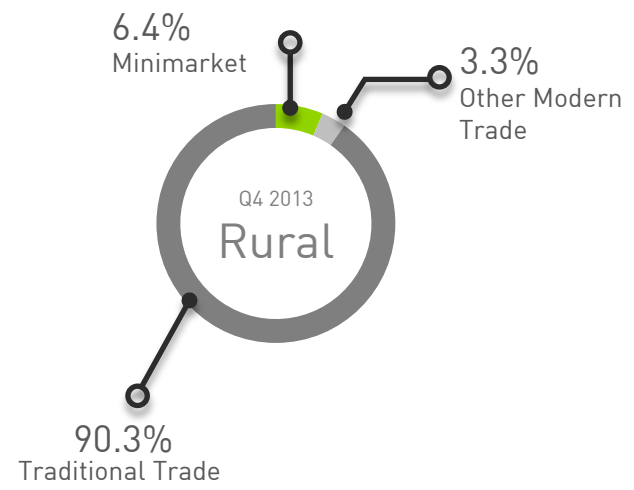
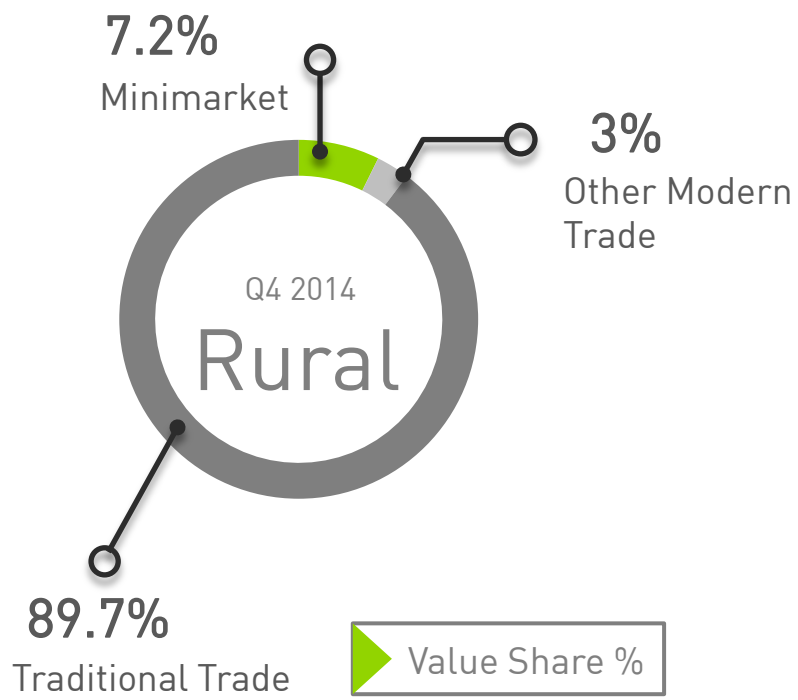
Source : Kantar Worldpanel Indonesia - Household Panel - Total FMCG



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RETAILER

# RETAILER SNAPSHOT - RURAL



Value Change %

Value Change %	Q4 2014 vs. YA
Minimarket	+28%
Traditional Trade	+14%

Source : Kantar Worldpanel Indonesia – Household Panel – Total FMCG



## SPOTLIGHT ON INDONESIA

The economic condition in National Indonesia results on budget cutting on FMCG purchase. Households tend to shop more with less shopping trip, indicated that HHs prefer a more valuable for money products to meet their expectation and budget.

Indonesia National, 2014 vs. 2013, Total FMCG

### FY 2013 VS 2012

**+ 14 %**

Value growth  
of total FMCG  
market

### FY 2014 VS 2013

**+ 15 %**

Value growth  
of total FMCG  
market



**2013**



**391x** SHOPPING TRIP

**2014**



**379x** SHOPPING TRIP

# 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](http://www.kantarworldpanel.com/id)

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