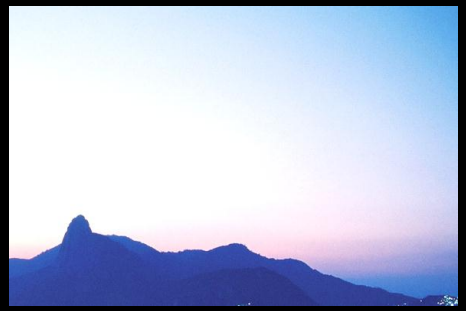
FMCG MONITOR

An integrated view of Indonesia FMCG market



MAY 2015

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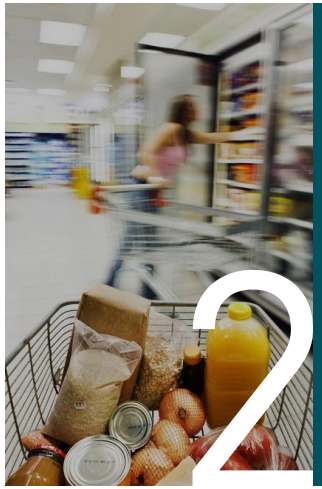
EXECUTIVE SUMMARY

1

Compared to April 2015, ID inflation in May 2015 **raised 0.36%**. Current yearly inflation in May 2015 is 7.15%.



2

In FMCG Market, the **decelerating trend** in last month still **continue in May.** The decelerating happened in both areas, urban and rural.

3

Detergent shows positive movement in Urban Indonesia. With not surprisingly **high penetration**, detergent still could **gained more consumption** from the buyers.

4

The most contributor among trade channel still goes **to Traditional Market** both in urban and rural area (with single digit growth).

5

Based on the consumer reach point index, **instant noodles is the most chosen category** by Indonesia Urban Consumer.

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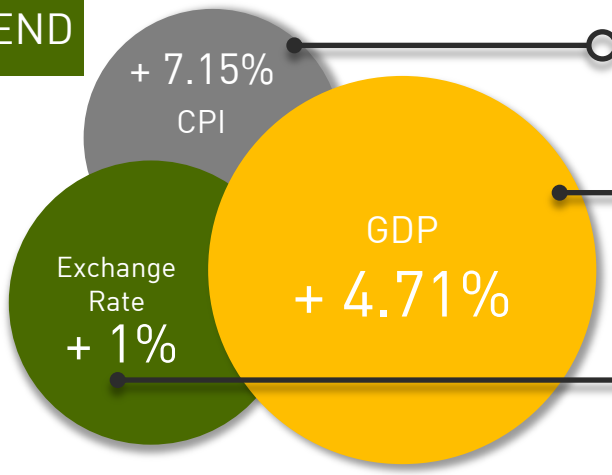
1 KEY INDICATOR

MACRO TREND



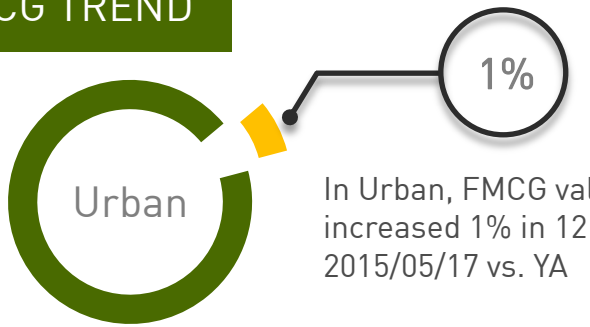
Compared to April 2015, ID inflation in May 2015 raised from 0.36%. Current yearly inflation in May 2015 is 7.15%.

In year on year basis, the GDP in first quarter 2015 is 4.71%

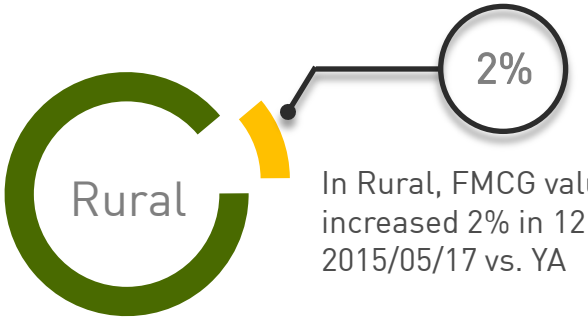
Rupiah exchange rate to USD is slightly getting stronger in May 2015 compared to a month ago, yet the exchange rate weakened by 14% in this month vs. year ago. The rate for USD 1 is 13,315 Rupiahs.

Source : *BPS and Bank Indonesia*

FMCG TREND



In Urban, FMCG value increased 1% in 12 w/e 2015/05/17 vs. YA



In Rural, FMCG value increased 2% in 12 w/e 2015/05/17 vs. YA

Source : *Kantar Worldpanel Indonesia | Household Panel*

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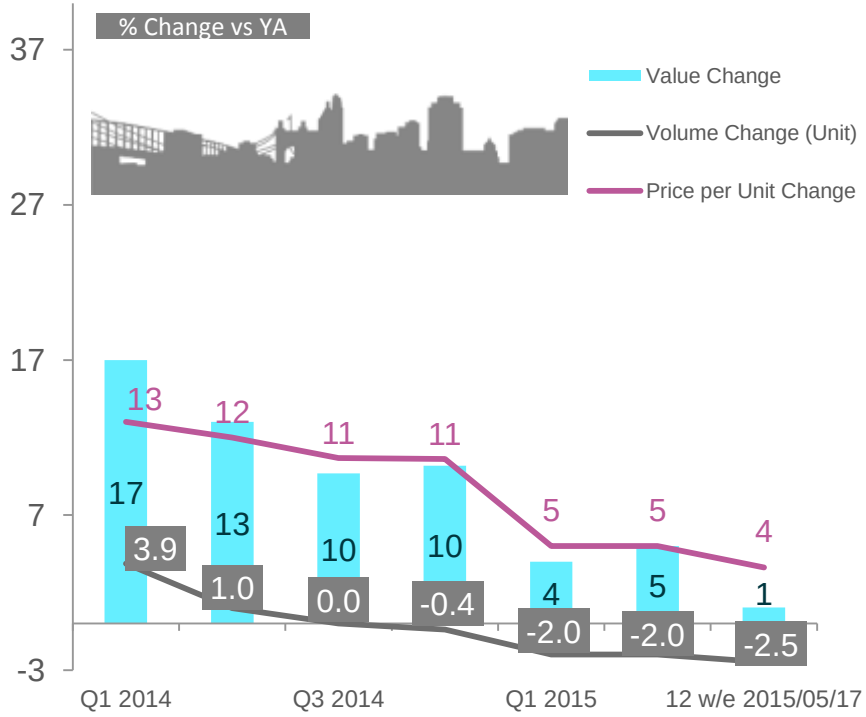
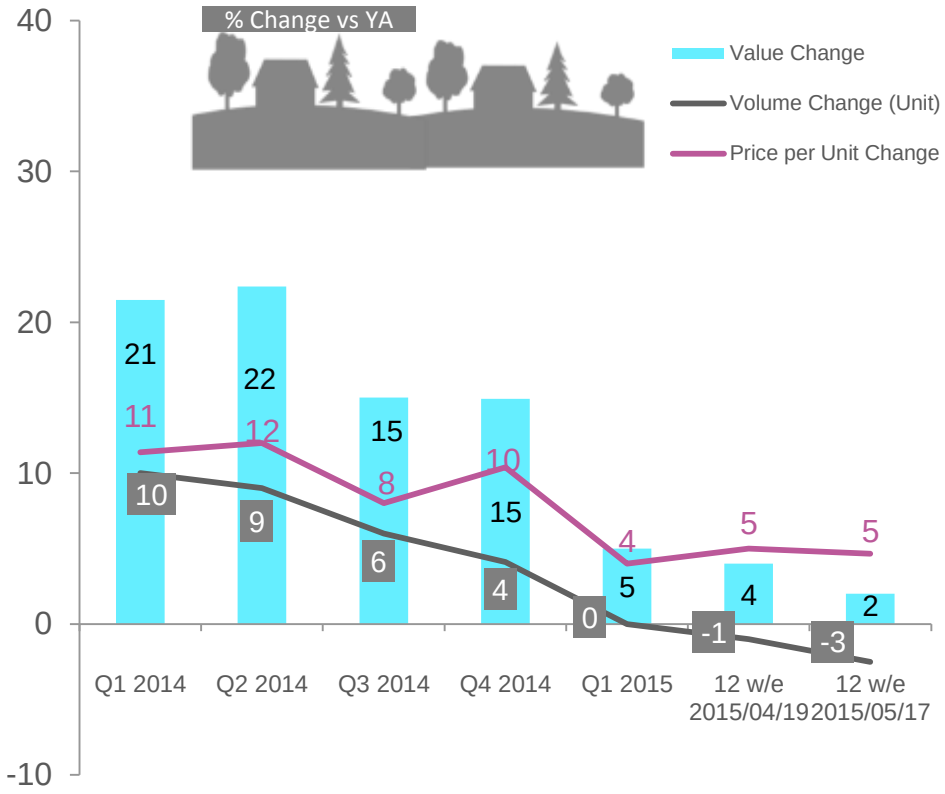
2 FMCG – 12 WEEKLY YEAR – ON – YEAR CHANGE (%)

The volume decelerating trend from Q3 2014 keep continuing until this May 2015. The trend happened both in urban and rural area.

URBAN



RURAL



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

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2 FMCG SEGMENTS TRENDS – VALUE CHANGE (%)

Dairy experienced the deepest decline of value which driven by unit volume decline that may be driven by upsizing trend that buyers buy less frequent but in bigger volume

URBAN

12 w/e 2015/05/17 vs. YA

FOODS	DAIRY	BEVERAGES	HOME CARE	PERSONAL CARE
+1 %	-6 %	-0.1%	+6 %	+5 %

RURAL

12 w/e 2015/05/17 vs. YA

FOODS	DAIRY	BEVERAGES	HOME CARE	PERSONAL CARE
+ 2%	+3%	-1%	+ 7%	- 0.4%

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

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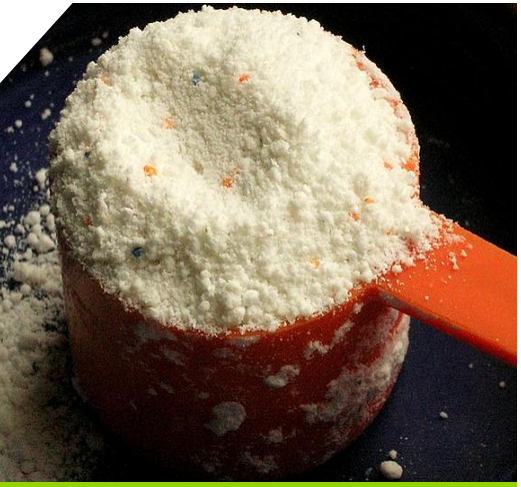

DETERGENT

3 HOT CATEGORIES
URBAN | 12 w/e 2015/05/17

Detergent shows positive movement in Urban Indonesia. With not surprisingly high penetration, detergent still could gained more consumption from the buyers. This can be shown from the quite large increase of average unit per household bought in 12 weekly ending May 2015.

99%

Total Penetration in Urban Indonesia
12 w/e 2015/05/17 vs. YA

11%

Average unit per HHs increase in Urban Indonesia
12 w/e 2015/05/17 vs. YA

Rp:

5.4%

The value growth increased in Urban Indonesia
12 w/e 2015/05/17 vs. YA

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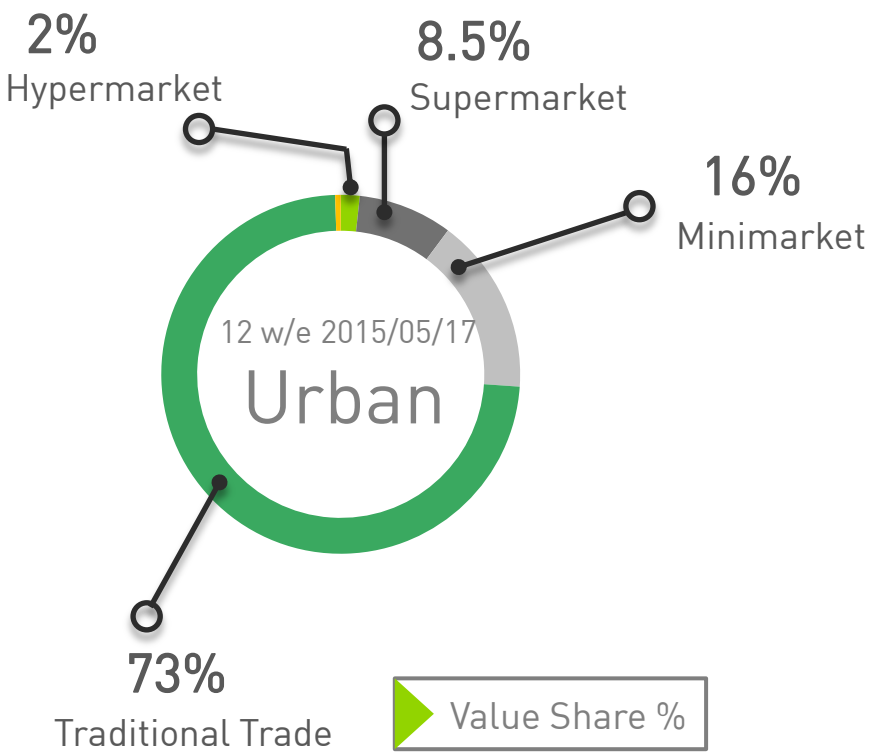
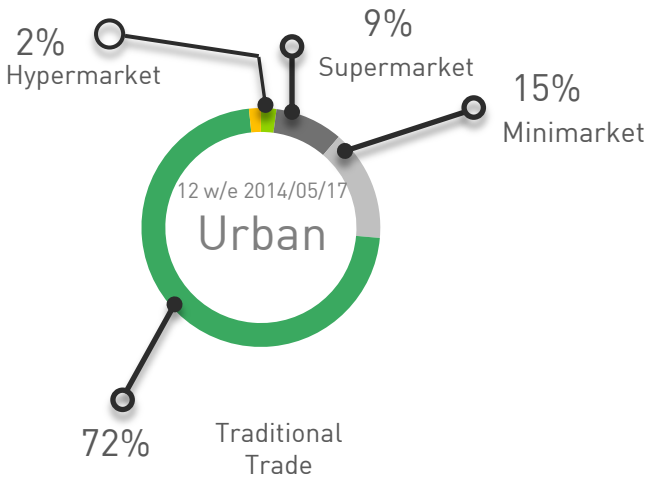
4 RETAILER SNAPSHOT URBAN





Value Change %

Value Change %	12 w/e 2015/05/17 vs. YA
Minimarket	+6%
Hypermarket	-17%
Supermarket	-6%
Traditional Trade	+3%

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

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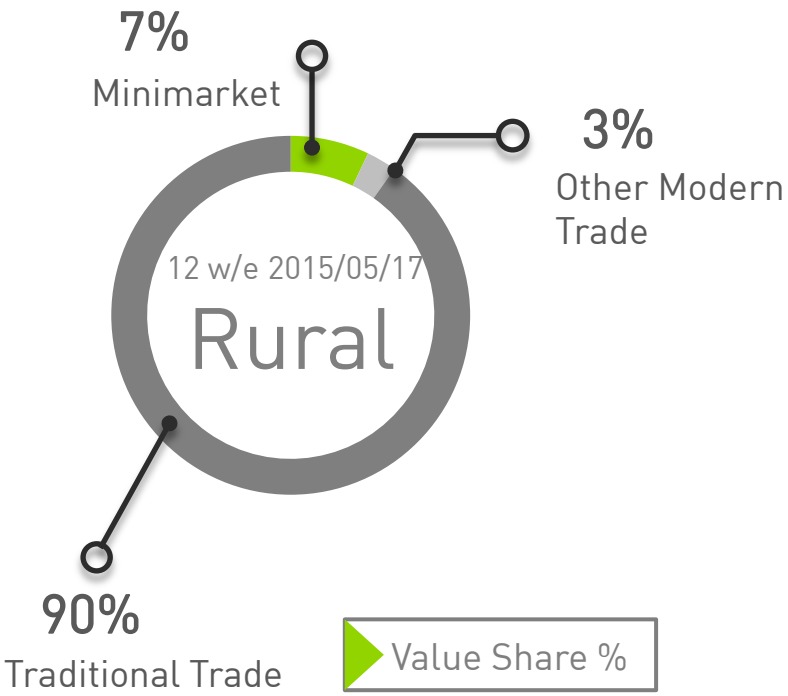
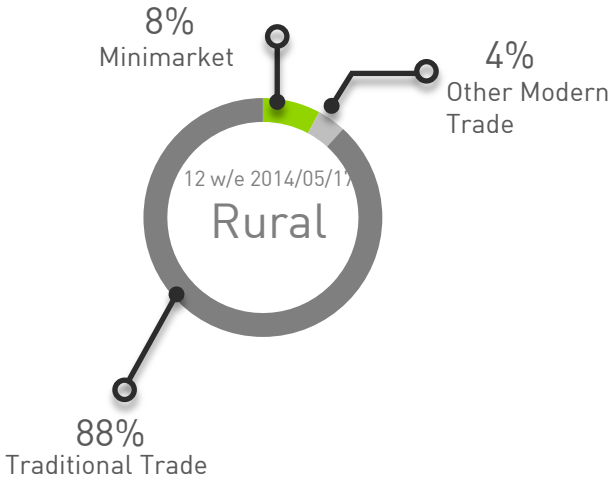
4 RETAILER SNAPSHOT RURAL





Value Change %

Value Change %	12 w/e 2015/05/17 vs. YA
Minimarket	-8%
Traditional Trade	+4%

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

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5 DO YOU KNOW?

Based on the Consumer Reach Point (CRP)* index, instant noodles is the most chosen category by Indonesia Urban Consumer. Instant coffee, biscuit, detergent, and MSG are also at the top 5 most chosen categories.

1

INSTANT NOODLE | CRP: 237 bil

2

INSTANT COFFEE | CRP: 219 bil

3

BISCUIT | CRP: 146 bil

4

DETERGENT | CRP: 133 bil

5

MSG | CRP: 132 bil

* CRP = Penetration x frequency x household population

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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