



# FMCG MONITOR

An integrated view of Indonesia FMCG market



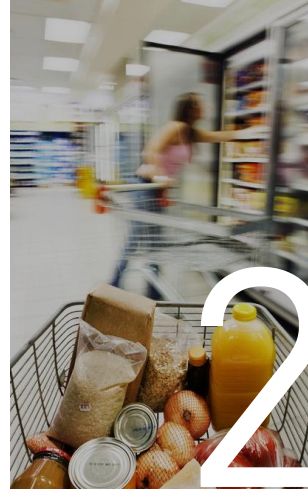
# JUNE 2015

# EXECUTIVE SUMMARY



1

Compared to May 2015, ID inflation in June 2015 **raised** 0.11% from 7.15%. Current yearly inflation in June 2015 is 7.26%.



2

As the Indonesia's economy slowing down, the **FMCG trend also decreased** in June 2015,. The decreasing trend happened both in urban and rural area.



3

In decreasing FMCG trends, insecticide still **manages to show positive movement** in Urban Indonesia, both in volume (in units) bought, penetration, and value growth.



4

Modern trade shows declining growth but **mini market** comes up as the only channel in modern trade that shows positive growth.



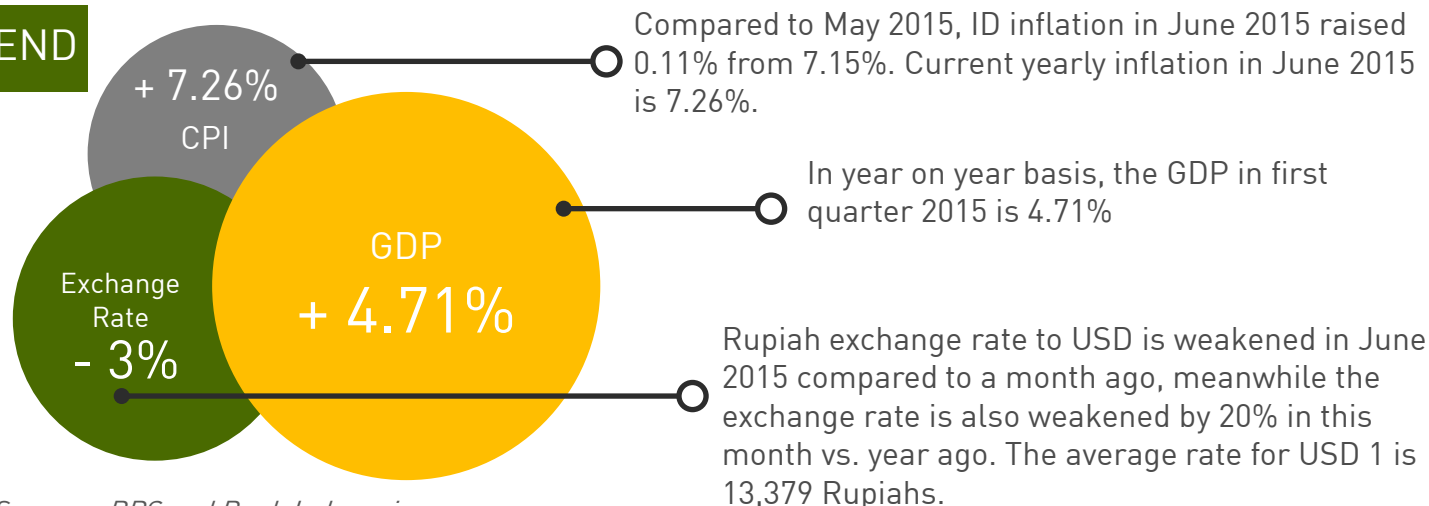
5

Some big FMCG categories experiencing **big decreased** due to economic slowdown. Find out the categories in this section.



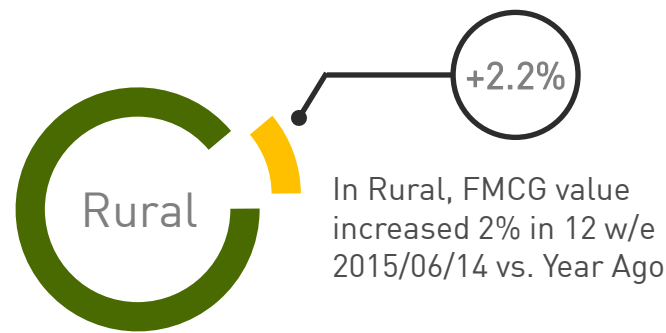
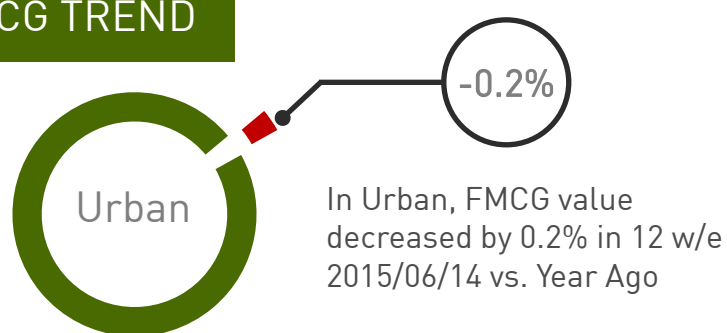
# 1 KEY INDICATOR

## MACRO TREND



Source : BPS and Bank Indonesia

## FMCG TREND



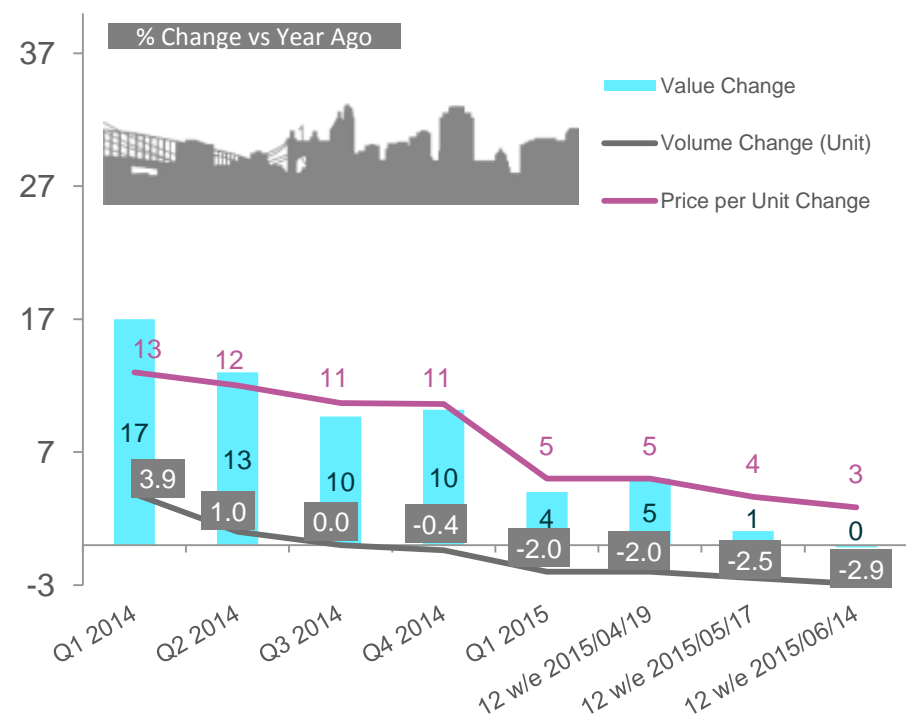
Source : Kantar Worldpanel Indonesia / Household Panel



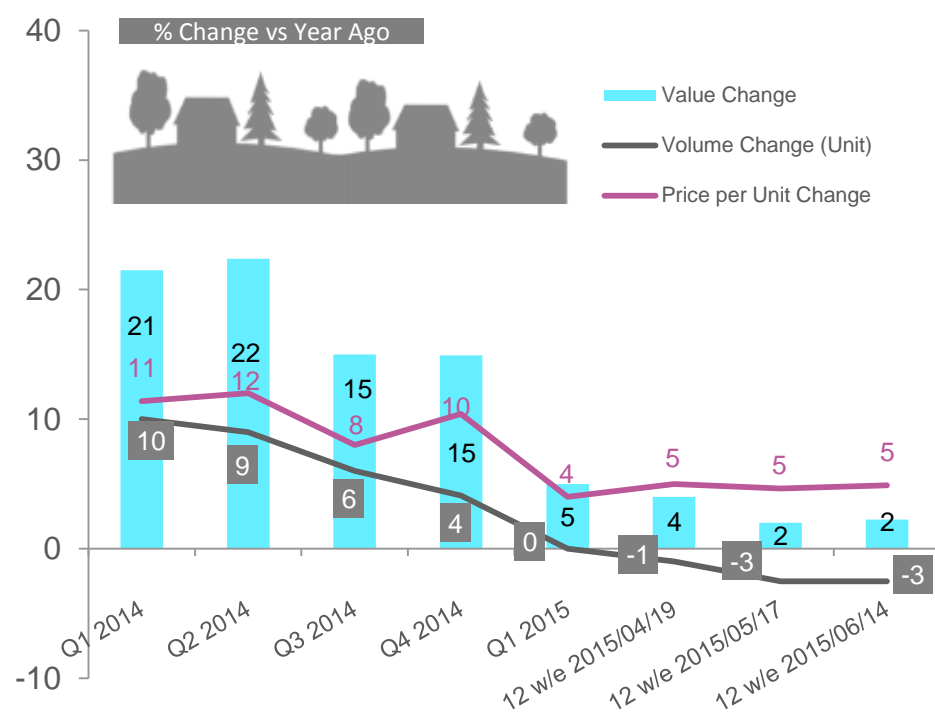
# 2 FMCG – 12 WEEKLY YEAR – ON – YEAR CHANGE (%)

As the Indonesia's economy slowing down, the FMCG trend also decreased in June 2015,. The decreasing trend happened both in urban and rural area.

## URBAN



## RURAL



Source : Kantar Worldpanel Indonesia – Household Panel – Total FMCG





## 2 FMCG SEGMENTS TRENDS – VALUE CHANGE (%)

Dairy still experienced the deepest decline of value. As dairy products become more expensive, some buyers decided to leave the category – while the remaining buyers are decreasing their consumption

### URBAN

12 w/e 2015/06/14 vs. Year Ago



FOODS

-2%



DAIRY

-7 %



BEVERAGES

-2%



HOME CARE

+6 %



PERSONAL CARE

+2 %

### RURAL

12 w/e 2015/06/14 vs. Year Ago



FOODS

+ 3%



DAIRY

+4%



BEVERAGES

+0%



HOME CARE

+5%



PERSONAL CARE

-2%

Source : Kantar Worldpanel Indonesia – Household Panel – Total FMCG

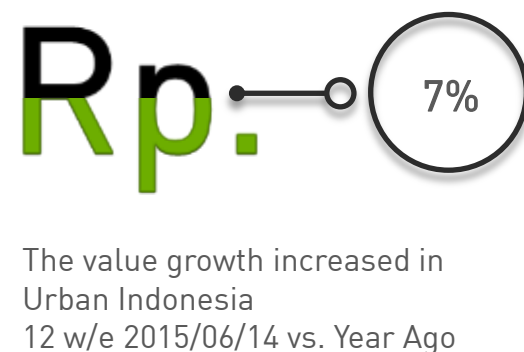
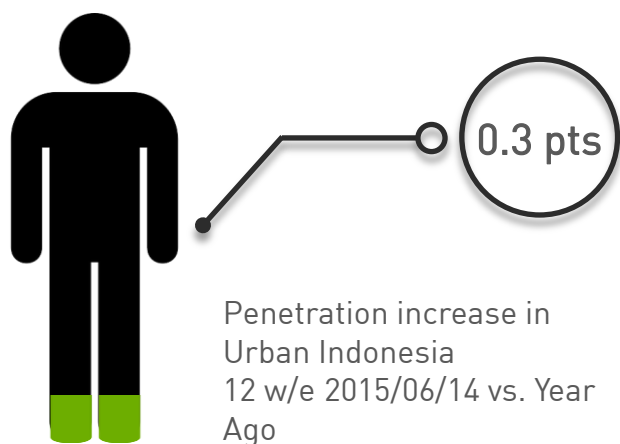
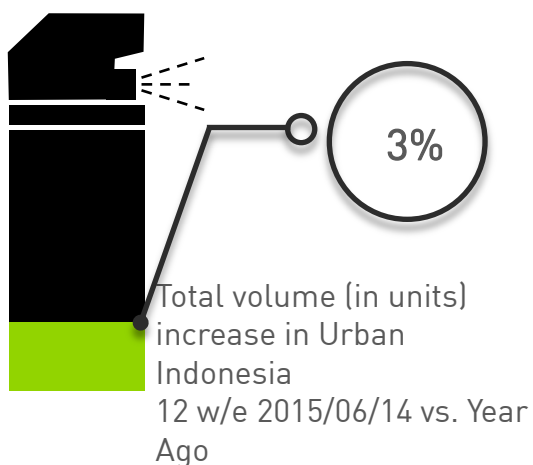


# 3 HOT CATEGORIES

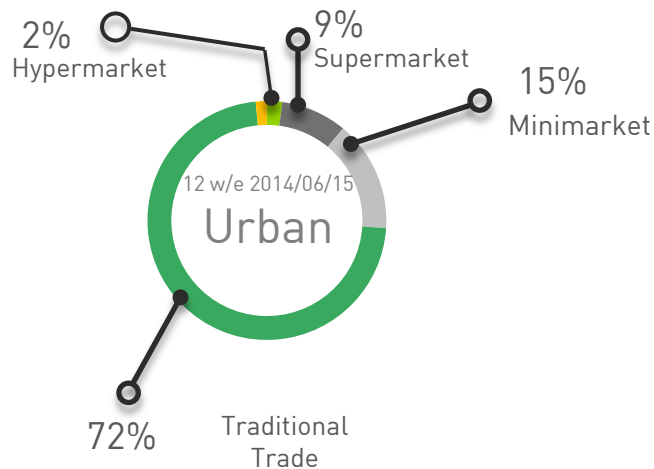
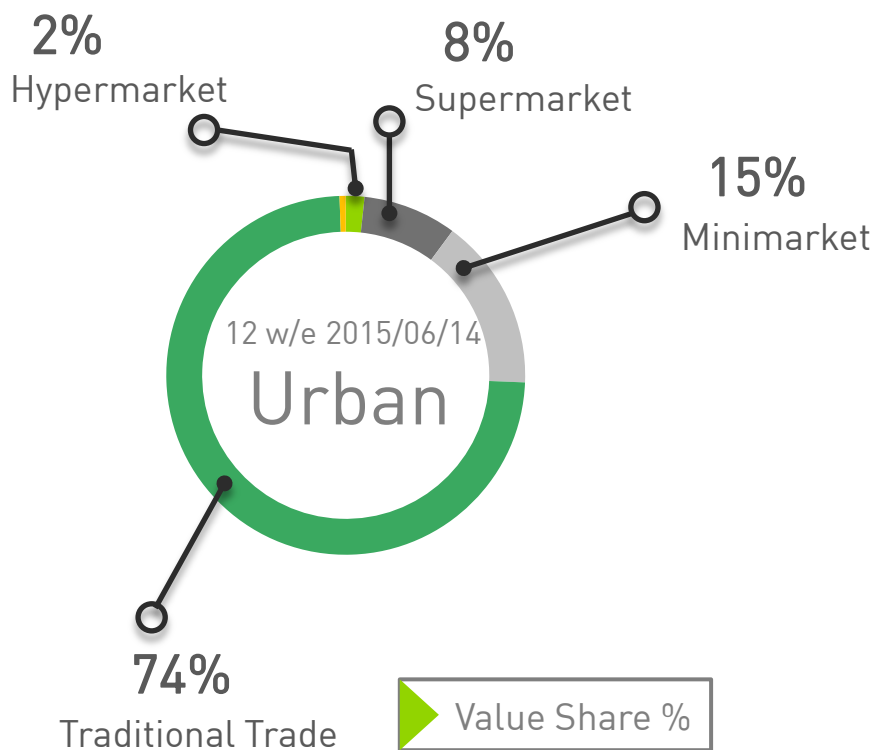
URBAN | 12 w/e 2015/06/14

In decreasing FMCG trends, insecticide still manages to show positive movement in Urban Indonesia, both in volume (in units) bought, penetration, and value growth.

## INSECTICIDE



# 4 RETAILER SNAPSHOT URBAN

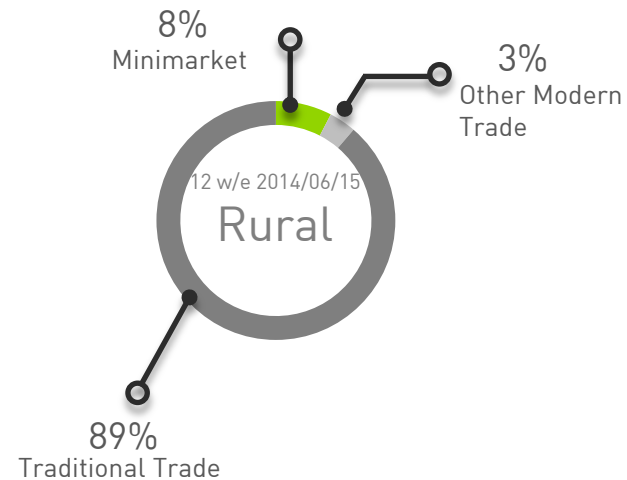
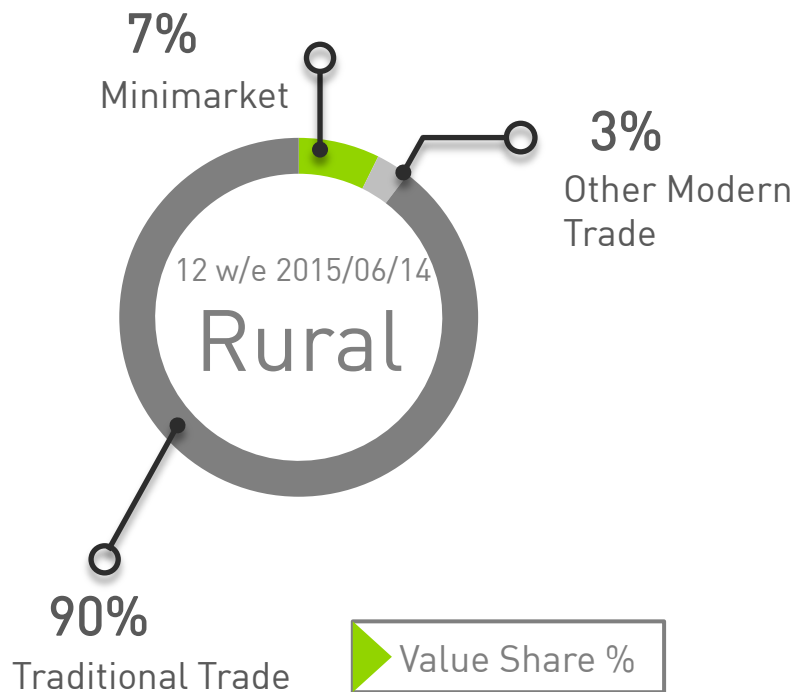


## Value Change %

Value Change %	12 w/e 2015/06/14 vs. Year Ago
Minimarket	+3%
Hypermarket	-19%
Supermarket	-6%
Traditional Trade	+2%

Source : Kantar Worldpanel Indonesia – Household Panel – Total FMCG

# 4 RETAILER SNAPSHOT RURAL



Value Change %	12 w/e 2015/06/14 vs. Year Ago
Minimarket	3%
Traditional Trade	-2%

Source : Kantar Worldpanel Indonesia – Household Panel – Total FMCG



# 5

## DO YOU KNOW?

Indonesia is facing economic slowdown phase, resulting decreasing trend in many sectors, including FMCG categories.

Here are the big FMCG categories that also suffer big decrease.

Urban Indonesia  
Date ending 12 weekly 2015/06/14  
Compared to year ago.  
Volume is in multi measure (Kg or L)



### GROWING UP MILK POWDER (GUMP)

Price per volume: ▲ 4.2%  
Volume sales: ▼ 14.4%

Market value: ▼ 10.8%  
Penetration: ▼ 3.1 points



### BISCUITS

Price per volume: ▲ 8.1%  
Volume sales: ▼ 17.3%

Market value: ▼ 10.6%  
Penetration: ▼ 4.9 points



### LIQUID MILK

Price per volume: ▲ 10.2%  
Volume sales: ▼ 22.1%

Market value: ▼ 14.2%  
Penetration: ▼ 11.9 points



### INFANT FORMULA

Price per volume: ▲ 16.1%  
Volume sales: ▼ 24.9%

Market value: ▼ 12.8%  
Penetration: 0 points




### RTD TEA

Price per volume: ▲ 4%  
Volume sales: ▼ 17.1%

Market value: ▼ 13.7%  
Penetration: ▼ 5.1 points



# ABOUT KANTAR WORLDANEL



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)

## CONTACT US

Kantar Worldpanel Indonesia  
Blok M Plaza 8<sup>th</sup> Floor | Jl. Bulungan No 76, 12130 | Jakarta Selatan

 [fanny.murhayati@kantarworldpanel.com](mailto:fanny.murhayati@kantarworldpanel.com)

 [dwiki.pradipto@kantarworldpanel.com](mailto:dwiki.pradipto@kantarworldpanel.com)

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



Kantar Worldpanel Indonesia



@KWP\_ID