

FMCG MONITOR

An integrated view of Indonesia FMCG market



AUGUST 2015

EXECUTIVE SUMMARY



1

Compared to July 2015, ID inflation in August 2015 **decreased from 7.26% to 7.18%**. The average rate for USD 1 is IDR 13,712 for August 2015.



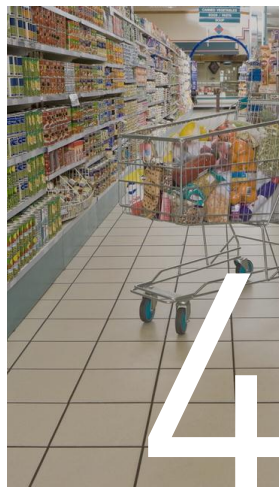
2

FMCG trend is still **below last year trend**, though it showed an **early sign of recovery** in August 2015. The negative volume trend is mainly driven by the number of shopping trip (frequency) plunge.



3

Drinking tea has become a daily habit for most people in Indonesia, so its not surprising that **tea still came up as a strong category even at difficult economy time**. Also, Eid and festive also help tea a lot to survive the wave.



4

Modern trade shows declining growth compared to last year while **traditional trade shows positive growth** this year.



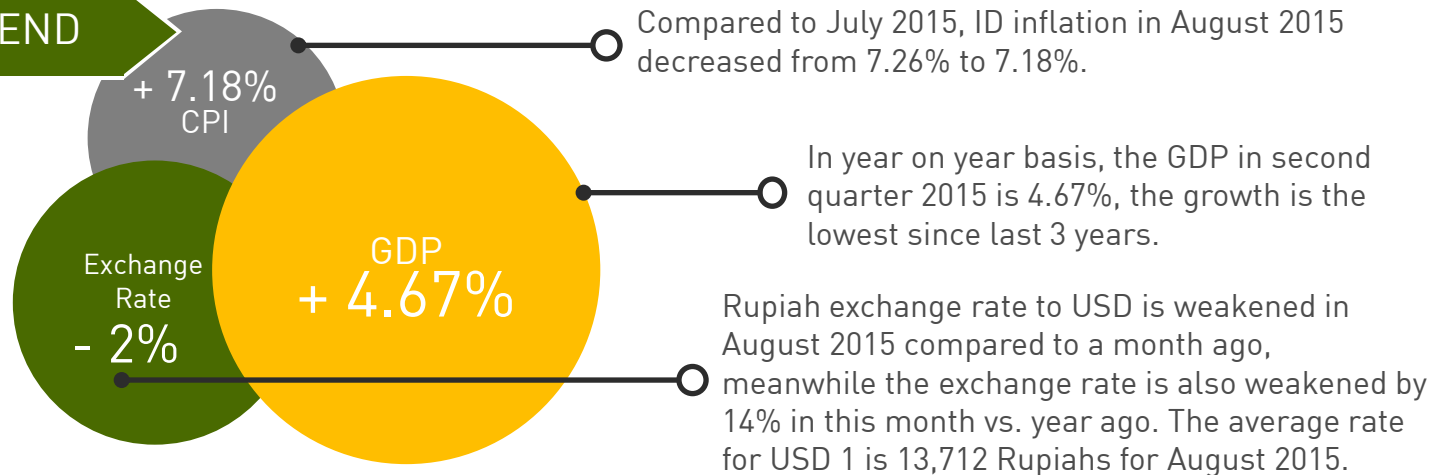
5

Out of Home consumption is as much important as in home consumption for some categories – especially for Ready to drink and Ready to eat categories.



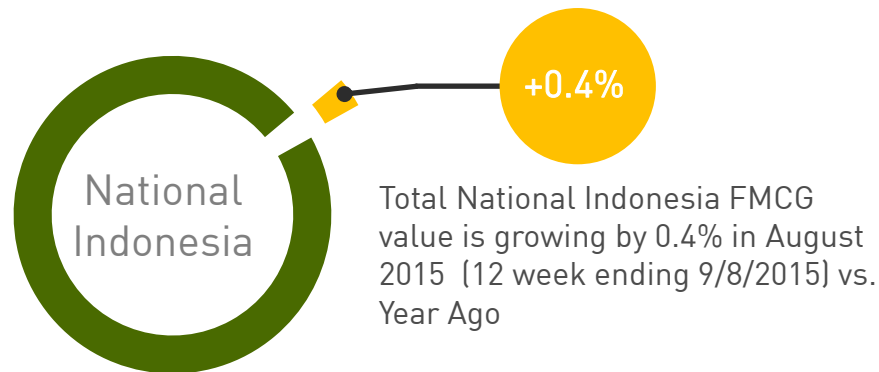
1 KEY INDICATOR

MACRO TREND



Source : BPS and Bank Indonesia

FMCG TREND



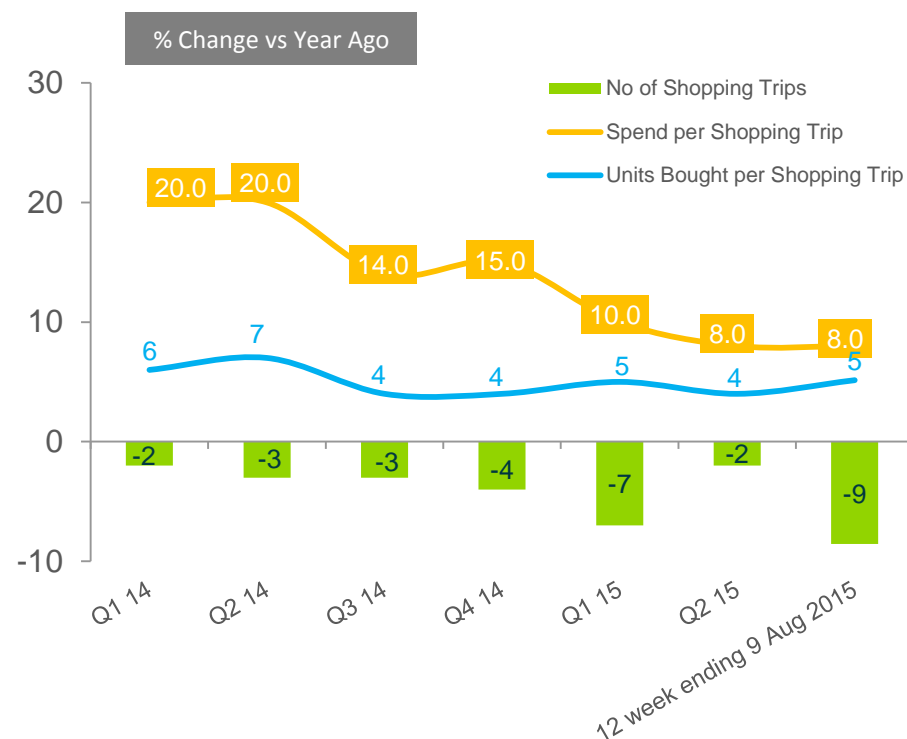
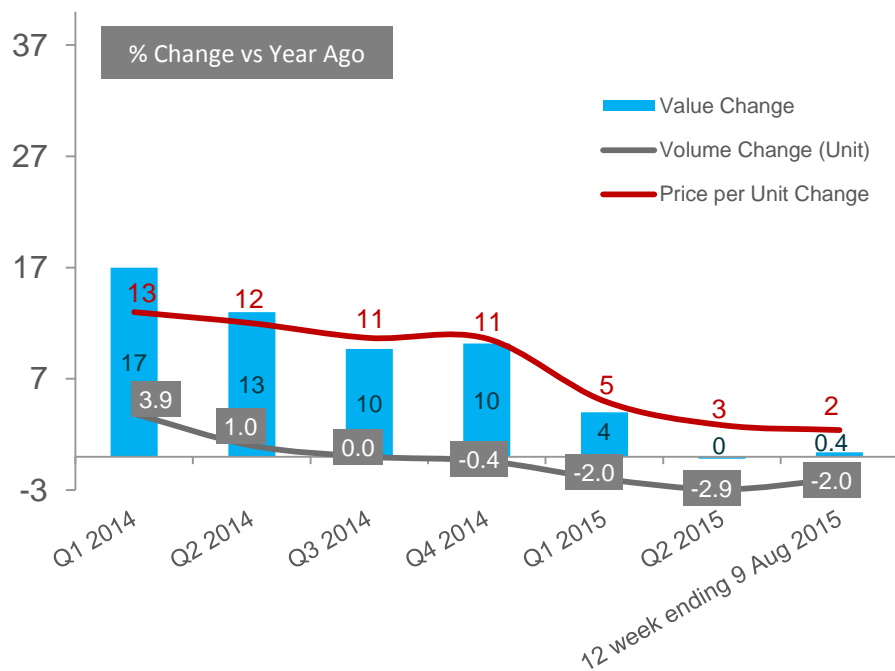
Source : Kantar Worldpanel Indonesia / Household Panel



2

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

FMCG trend is still below last year trend, though it showed an early sign of recovery in August 2015. The negative volume trend is mainly driven by the number of shopping trip (frequency) plunge.

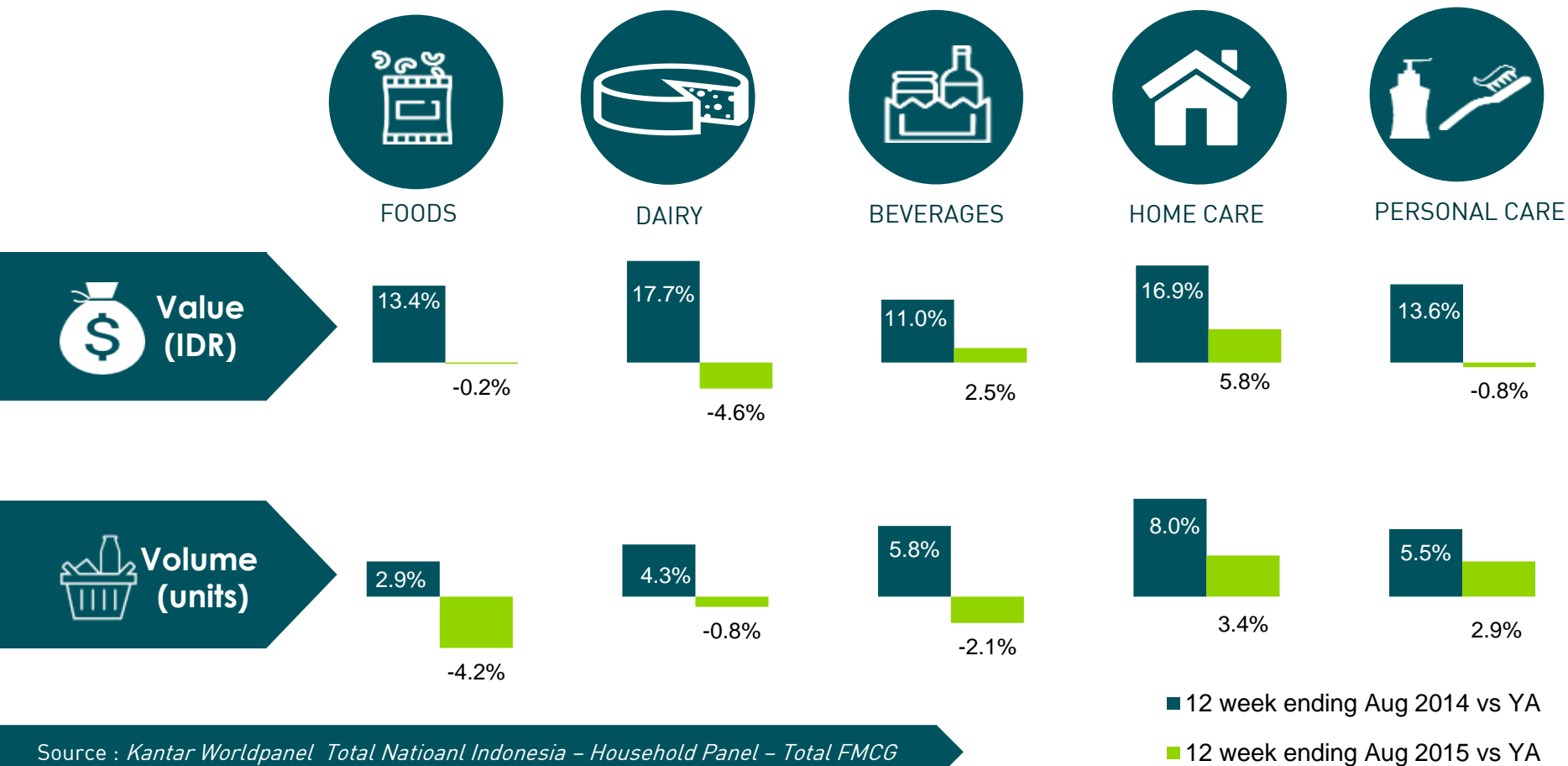


Source : Kantar Worldpanel Indonesia – Total National Indonesia – Household Panel – Total FMCG



FMCG SEGMENTS TRENDS – VALUE AND VOLUME CHANGE (%)

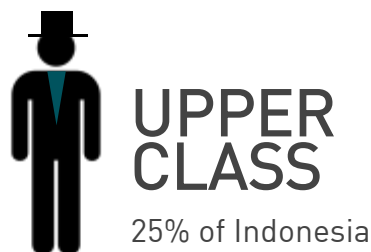
Generally all FMCG segments suffered big decline growth both in value and volume compared to last year. However, in term of value growth, dairy has experienced the biggest decline.





FMCG BUYERS BEHAVIOUR ACCROSS SES

All across SES experienced decrease in shopping frequency causing the volume decline. The value growth within the middle class and lower class most likely to be driven by price growth.



VALUE



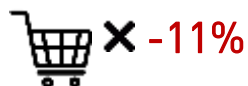
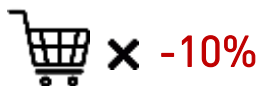
VOLUME
(IN UNIT)



PRICE/UNIT



FREQ



#CATEGORIES
BOUGHT CHANGE

-1

-1

-1

Indonesia National, 12 we Aug 2015 vs. 12 we Aug 2014, Total FMCG, SECS Breakdown (based on monthly household expenditure)



TEA (Exclude RTD TEA)

3 HOT CATEGORIES

NATIONAL | 12 week ending 9/8/2015

Indonesia is a tea drinking country. Drinking tea has become a daily habit for most people in Indonesia, so its not surprising that tea still came up as a strong category even at difficult economy time. Also, Eid and festive also help tea a lot to survive the wave.



4%

Total volume (in units)
increase in National
Indonesia
(12 week ending
12/7/2015 vs. Year Ago)



4%

Shopping Frequency increase
in National Indonesia
(12 week ending 12/7/2015
vs. Year Ago)

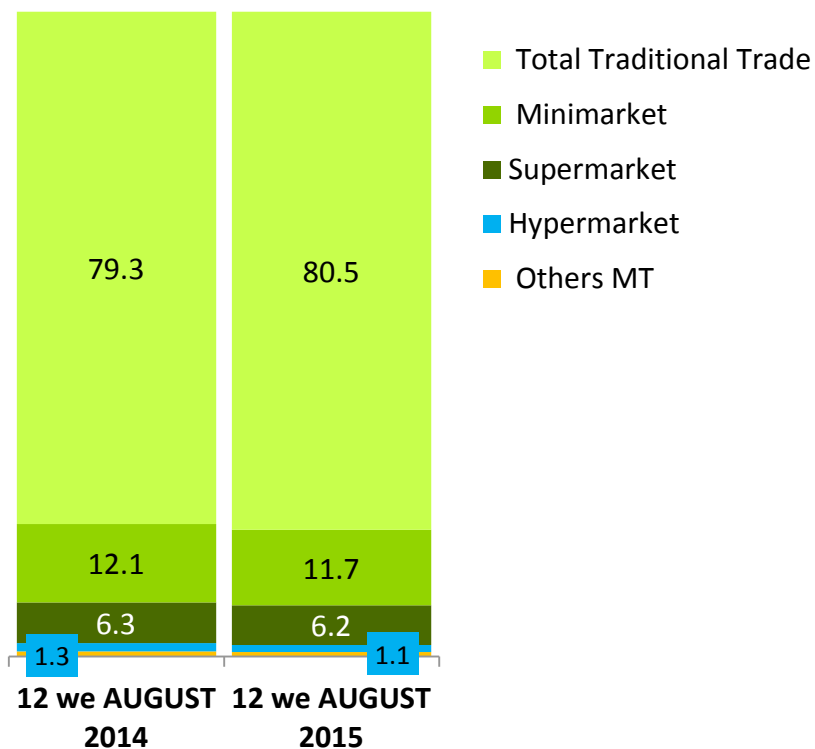
Rp.

14%

The value growth increased in
National Indonesia
(12 week ending 12/7/2015 vs. Year
Ago)

4 RETAILER SNAPSHOT NATIONAL INDONESIA

Value Share %



Value Change % (vs Year Ago)

Value Change %	12 week ending 8/9/2015 vs. Year Ago
Hypermarket	-20%
Supermarket	-2%
Minimarket	-3%
Traditional Trade	2%

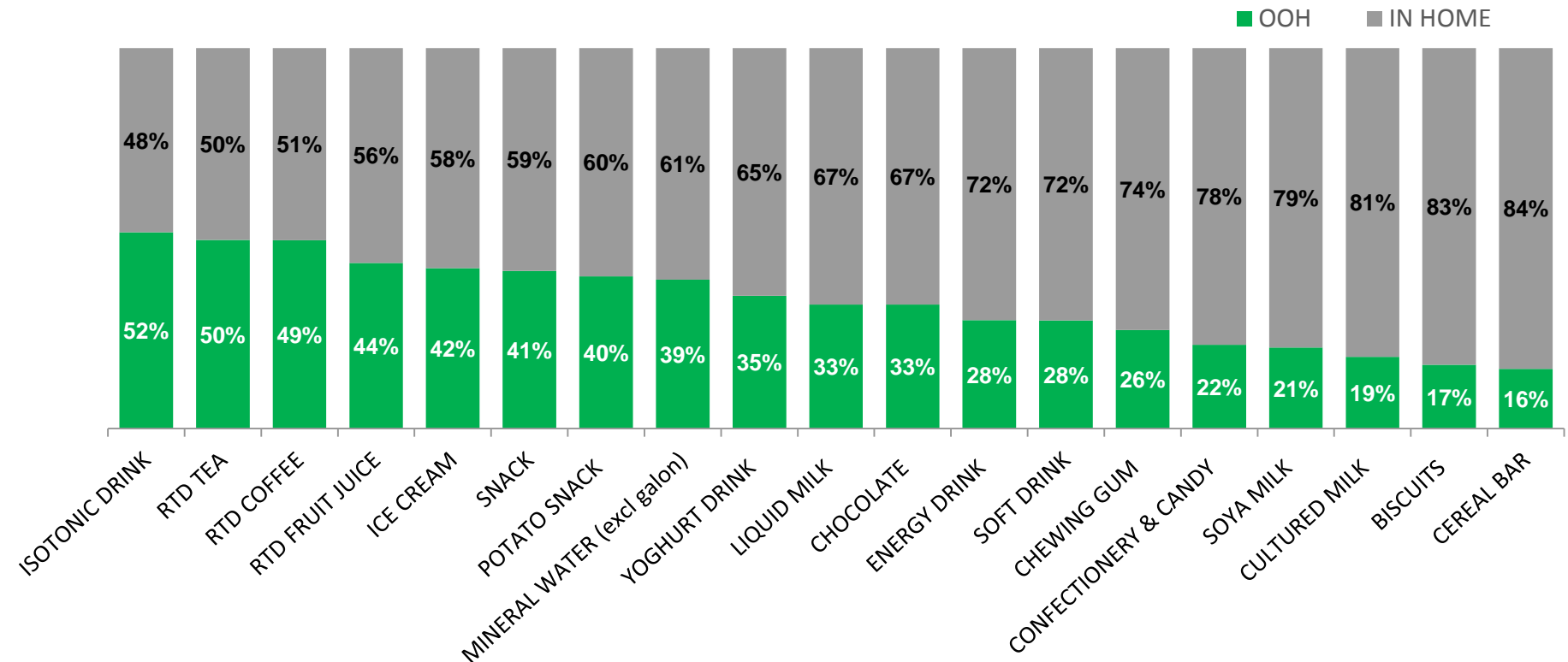
Modern trade still shows declining growth compared to last year while traditional trade shows positive growth this year vs year ago.

Source : Kantar Worldpanel Indonesia – Household Panel – Total FMCG

5 DO YOU KNOW?


Out of Home consumption is same important as in home consumption for some categories – especially for food and beverage categories. For beverage like isotonic drink and RTD Tea, Out of Home consumption contributes until more than half total value.

VALUE % IN HOME VS OUT OF HOME | 12 week ending Aug 2015





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 50 million households.

For further information, please visit us at www.kantarworldpanel.com/id

CONTACT US

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

✉ fanny.murhayati@kantarworldpanel.com

✉ dwiki.pradipto@kantarworldpanel.com

🌐 www.kantarworldpanel.com/id



Kantar Worldpanel Indonesia



@KWP_ID