FMCG MONITOR

An integrated view of Indonesia FMCG market

NOVEMBER
2015

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EXECUTIVE SUMMARY

1

Compared to October 2015, **ID inflation in November 2015 decreased from 6.25% to 4.89%.** The average rate for USD 1 is **Rp 13,741,- in November 2015**

2

FMCG trend continues showing negative trend in November 2015. Although FMCG's value gaining positive growth, it is driven by increasing price per unit which is quite higher compared to last period (Q3 2015).

3

MSG is still showing positive growth in value, volume, penetration and even in frequency – quite surprising as consumers are decreasing buying frequency for most other FMCG categories.

4

Modern trade is enjoying positive value growth. On the other hand, traditional trades are undergoing slightly negative growth compared to same quarter a year ago.

5

Different beverage categories, different top consumers age. Find out more about beverages top consumers' age here.

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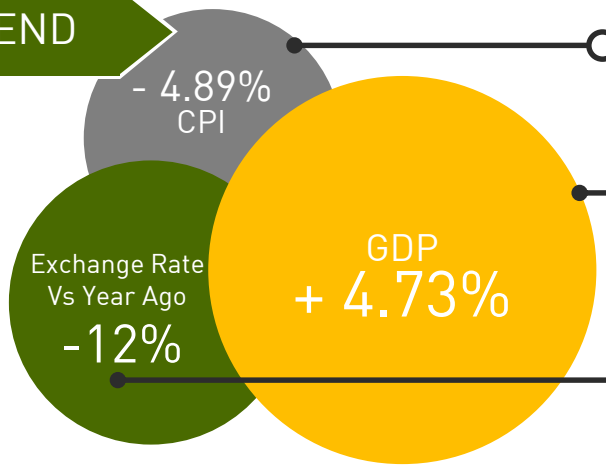
1 KEY INDICATOR

MACRO TREND



Compared to October 2015, ID inflation in November 2015 decreased from 6.25% to 4.89%.

Indonesia Q3 GDP growth 4.73%, slightly below economist expectations at 4.79% (via CNBC/Reuters).

Rupiah exchange rate to USD is strengthened 1% in November 2015 compared to a month ago, although the exchange rate is weakened by 12% in this month vs. year ago. The average rate for USD 1 is Rp 13,741- in November 2015

Source : *BPS and Bank Indonesia*

FMCG TREND

Total National Indonesia FMCG value is growing by 1.1% in November 2015 (12 week ending 8 Nov 2015) vs. Year Ago

Source : *Kantar Worldpanel Indonesia | Household Panel*

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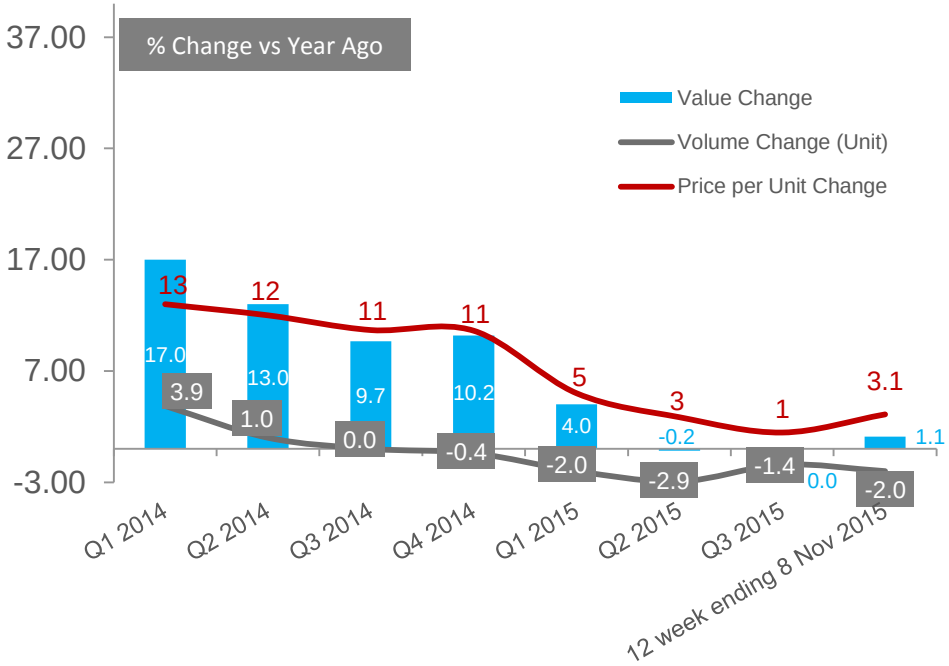
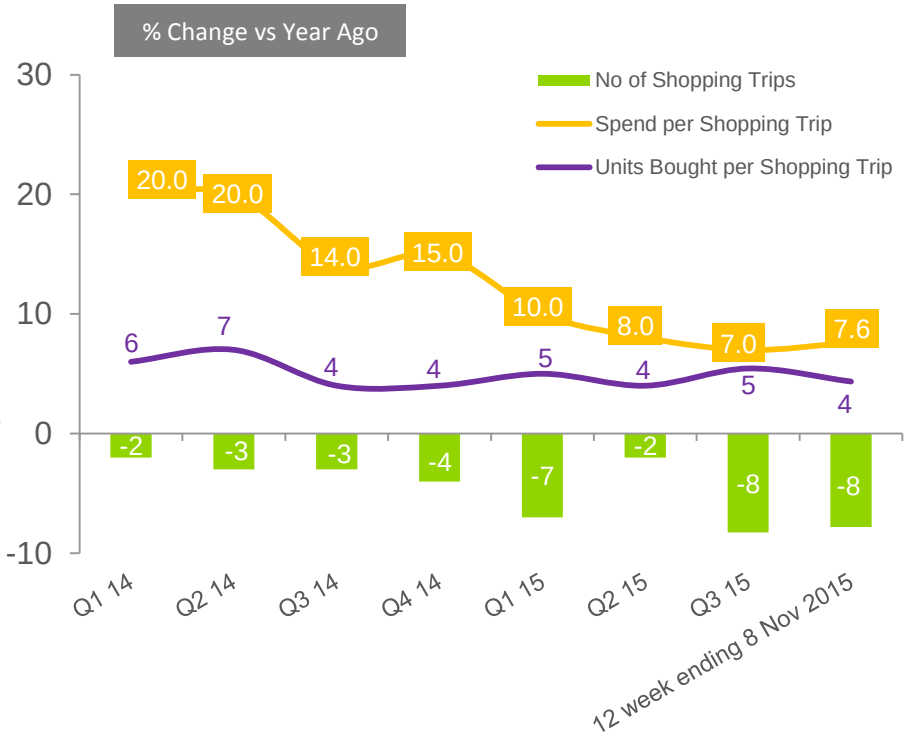
2 FMCG – 12 WEEKLY YEAR – ON – YEAR CHANGE (%)

FMCG trend continues showing negative trend in November 2015. Although FMCG's value gaining positive growth, it is driven by increasing price per unit which is quite higher compared to last period (Q3 2015).





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

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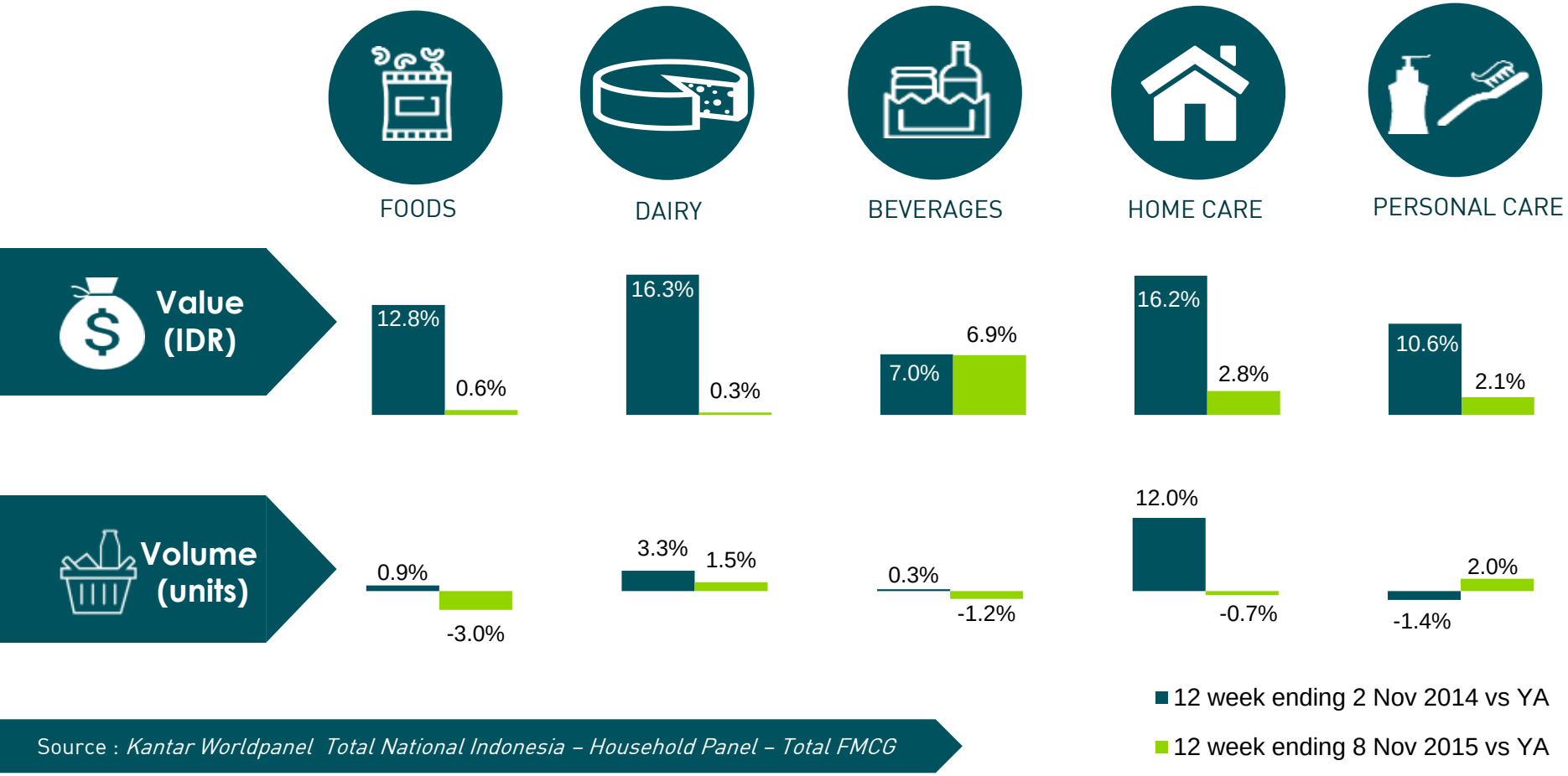
FMCG SEGMENTS TRENDS – VALUE AND VOLUME CHANGE (%)

All categories experienced positive growth in value but negative growth in volume, indicating that the value growth is mainly driven by other factor such as price increase. In contrary, personal care and dairy are still enjoying positive growth both in value and volume.



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

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MSG

3 HOT CATEGORIES
NATIONAL | 12 week ending 8 Nov 2015

In decreasing FMCG trends, Monosodium Glutamate (MSG) is still showing positive growth in value, volume, penetration and even in frequency – quite surprising as consumers are decreasing buying frequency for most other FMCG categories. Indicating that taste is still being an important factor for Indonesian consumers' daily cuisines.

3.77%

Total volume (in units) increase in National Indonesia (12 week ending 8 Nov 2015 vs. Year Ago)

4.2%

Shopping Frequency increase in National Indonesia (12 week ending 8 Nov 2015 vs. Year Ago)

Rp:

7.77%

The value growth increased in National Indonesia (12 week ending 8 Nov 2015 vs. Year Ago)

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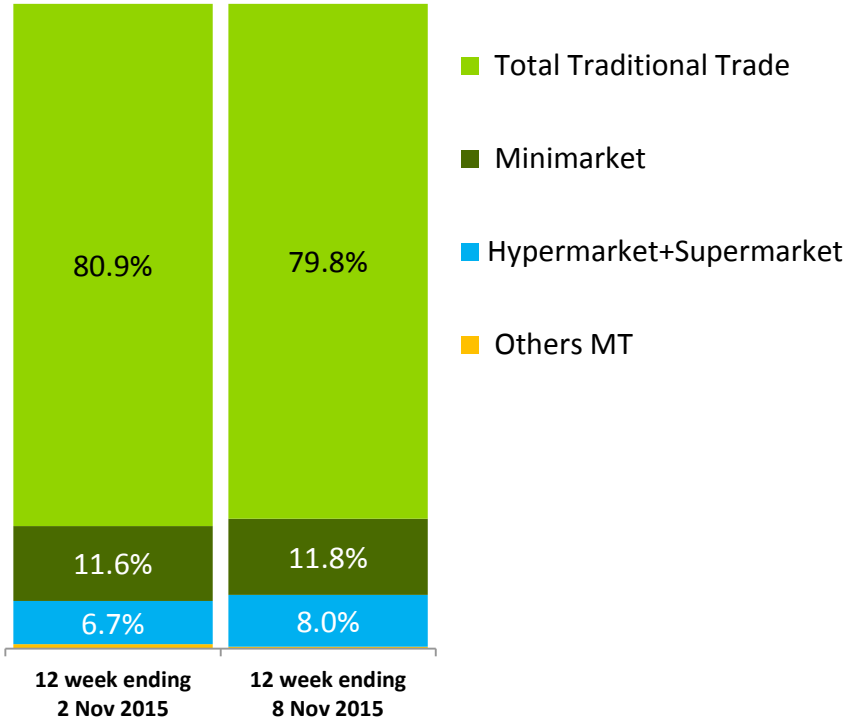
4 RETAILER SNAPSHOT NATIONAL INDONESIA

Value Share %



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

Value Change % (vs Year Ago)

Value Change %	12 week ending 8 Nov 2015 vs. Year Ago
Total Modern Trade	+6.95%
Minimarket	+2.9%
Traditional Trade	-0.3%

In general, for this quarter modern trade is enjoying positive value growth. Minimarket as the biggest modern trade channel, also enjoying positive growth. On the other hand, traditional trades are undergoing slightly negative growth compared to same quarter a year ago.

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5 DO YOU KNOW?

Different beverage categories, different top consumers age. By looking at our Out of Home Panel, most consumers for RTD tea are teenagers, soft drinks top consumers are young adults, while drinking water is more skewed to adult consumers.

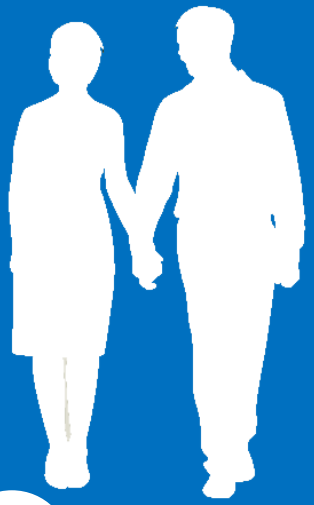
RTD TEA

25% OF RTD TEA CONSUMERS ARE **TEENS**

SOFT DRINK

30% OF SOFT DRINK CONSUMERS ARE **YOUNG ADULTS**

DRINKING WATER



25% OF DRINKING WATER CONSUMERS ARE **ADULTS**

Data for Urban Indonesia. Based on Value share 52 week ending 8 Nov 2015

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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 50 million households.

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

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