



FMCG MONITOR

An integrated view of Indonesia FMCG market



FULL YEAR
2015

EXECUTIVE SUMMARY



1

Compared to November 2015, ID inflation in December 2015 decreased from 4.89% to 3.35%. The average rate for USD 1 is Rp 13,960- at end of December 2015



2

Compared to previous years' growth, FMCG growth in 2015 is **dropping quite steep**. Economic slowdown impacting **consumers behavior**, as well as FMCG categories.



3

With 15% value growth, 10% volume (L) and 1.4 penetration points growth, **dish wash comes up as the hottest category of 2015**



4

Throughout 2015, all trade channels are **impacted by the economic slow down** since people also less frequent to shop.



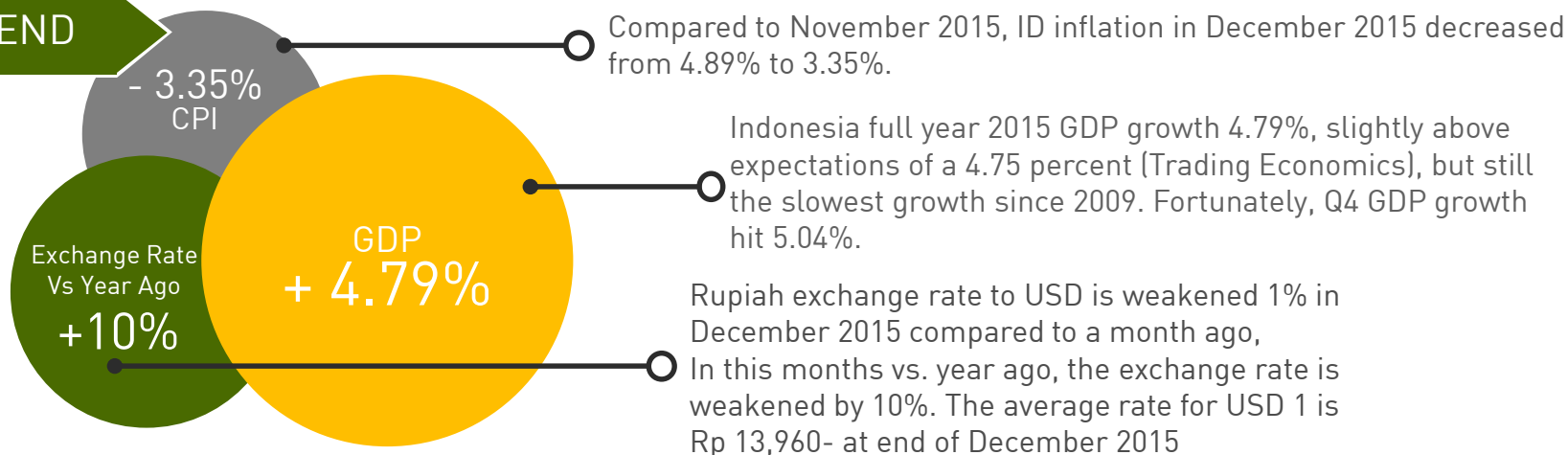
5

During difficult economy time in 2015, **consumers tend to behave differently** compared to previous years. Find out more in this section.



1 KEY INDICATOR

MACRO TREND



Source : BPS and Bank Indonesia

FMCG TREND



Total National Indonesia FMCG value slightly increased by 1% in Early January 2016 (52 week ending 3 Jan 2016) vs. Year Ago

Source : Kantar Worldpanel Indonesia / Household Panel

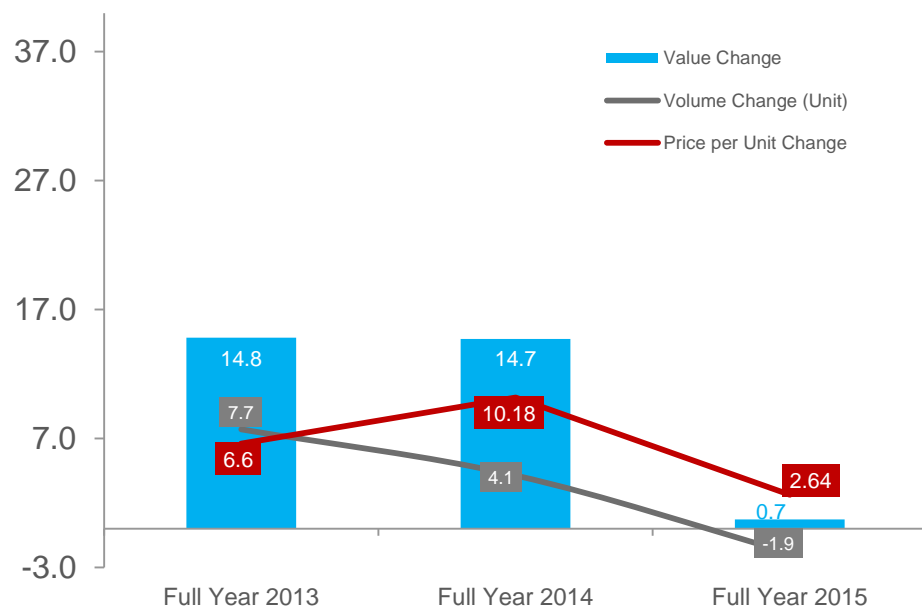


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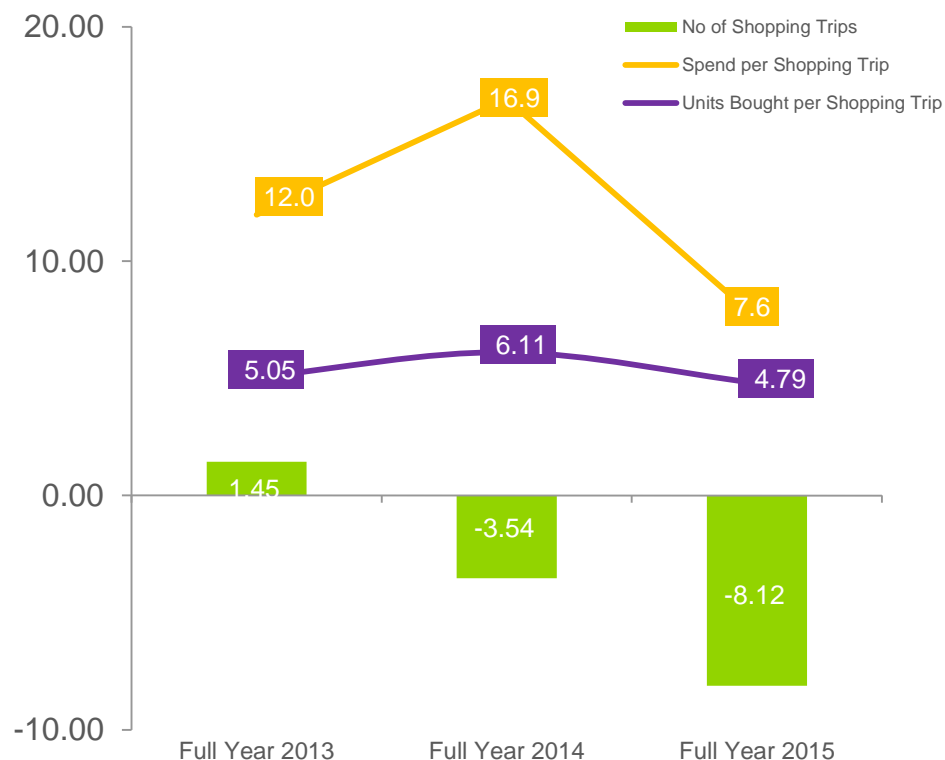
FMCG – FULL YEAR – YEARLY CHANGE (%)

Compared to previous years' growth, FMCG growth in 2015 is dropping quite steep. Economic slowdown impacting consumers behavior, causing FMCG categories to also feel the effect. Consumers were mostly hold their spending and decrease their shopping consumption.

% Change vs Year Ago



% Change vs Year Ago

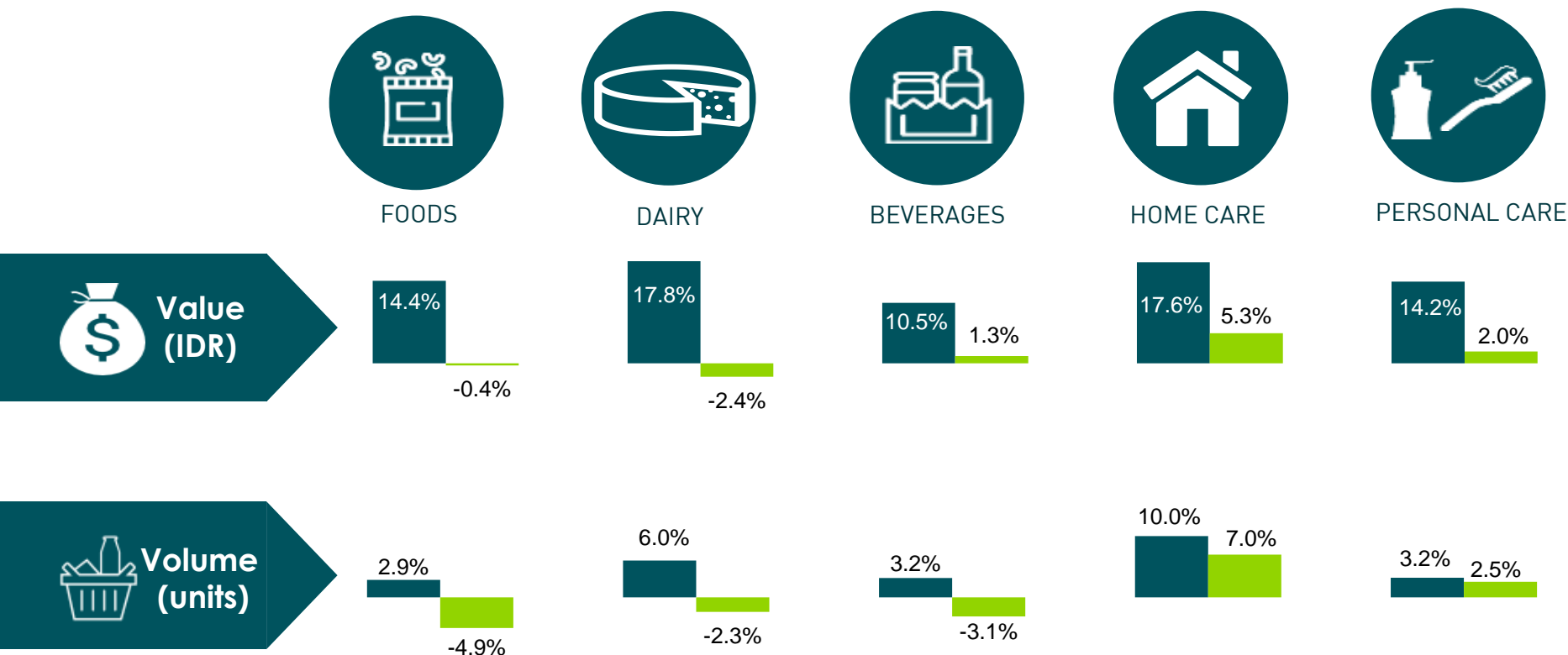


Source : Kantar Worldpanel Indonesia – Total National Indonesia – Household Panel – Total FMCG



FMCG SEGMENTS TRENDS – VALUE AND VOLUME CHANGE (%)

Throughout the year, most segments growth are slower, some even showed negative growth both in value and volume. Foods and Dairy are the segments that were impacted the most by the economic slowdown.



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

■ 52 week ending 28 Dec 2014 vs Year Ago

■ 52 week ending 3 Jan 2016 vs Year Ago



Dish Wash

3 HOT CATEGORIES

NATIONAL | Full Year 2015

With 15% value growth, 10% volume (L) and 1.4 penetration points growth, dish wash comes up as the hottest category of 2015 - showing that even in difficult economy time, consumers still spare their pockets for necessity category like dish wash.

Rp.

+15%

TOTAL VALUE
INCREASE (IDR)



+10%

TOTAL VOLUME
INCREASE (L)

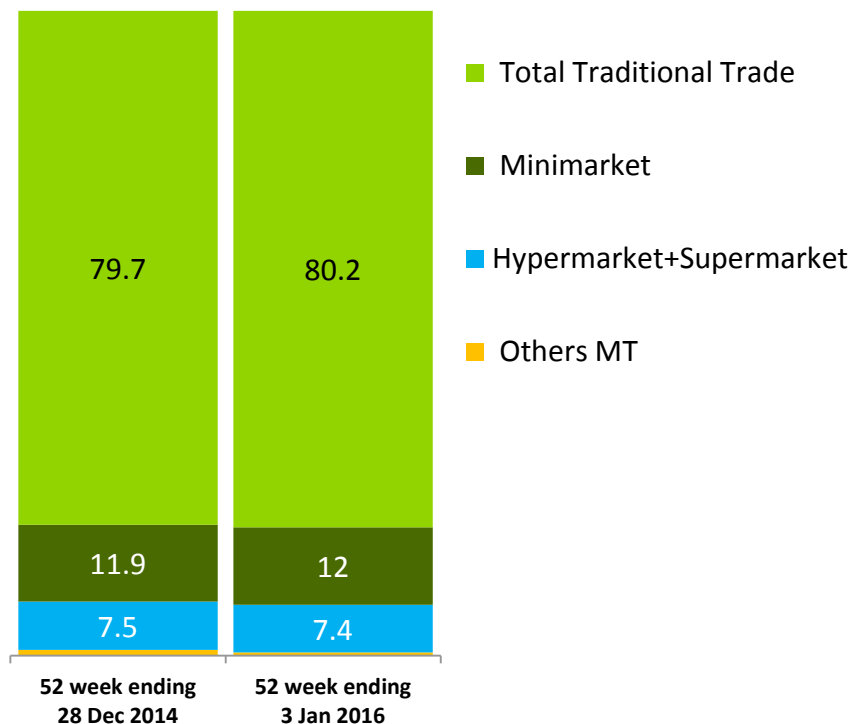


+1.4 pts

PENETRATION
INCREASE

4 RETAILER SNAPSHOT NATIONAL INDONESIA

Value Share %



Value Change % (vs Year Ago)

Value Change %	52 week ending 3 Jan 2016 vs. Year Ago
Total Modern Trade	-2%
Minimarket	+1%
Traditional Trade	+1%

Throughout 2015, all trade channels are impacted by the economic slow down since people also less frequent to shop. Traditional trade as the biggest is still growing slightly, however compared to last year, the progress is slower.

Modern trade is the one that more impacted to the situation as this channel experienced negative growth.

Source : Kantar Worldpanel Indonesia – Household Panel – Total FMCG

5 DO YOU KNOW?

During difficult economy time in 2015, consumers tend to behave differently compared to previous years. Find out more below.

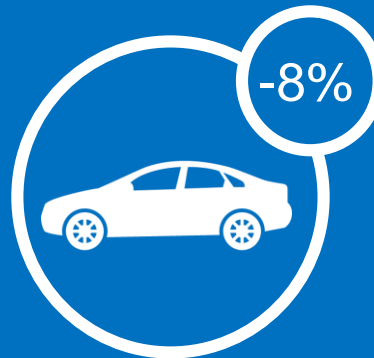
VALUE



+1% value growth

FMCG still experienced positive 1% growth in 2015 compared to a year ago. Unfortunately the growth is much slower as an impact from the economic slowdown.

SHOPPING FREQUENCY



348 times in a year.

Difficult economic time forces consumers to hold their spending: they decided to decrease shopping trip, mostly to avoid impulse buying.

AVERAGE SPEND PER TRIP



IDR 15,056 per trip.

Consumers spend 8% more per shopping trip compared to last year, as a result from their less shopping frequency – although inflation also plays a part on this.



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

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