NOVEMBER
2016

FMCG MONITOR

An integrated view of Indonesia FMCG market

KANTAR WORLDPANEL

EXECUTIVE SUMMARY

1 KEY MARKET INDICATOR

Total National Indonesia FMCG value managed to grow 4.5% in November 2016 vs last year. The growth increased by 0.1% compared to last month.

2 FMCG INDICATOR

Although price continues to increase and consumers have to spend more to get the same basket of goods, consumers are increasing the size of their basket per trip.

3 RETAILERS SNAPSHOT

In November 2016, the importance of Modern Trade is felt strongly as compared to last year it has grown more in total value share.

4 SEGMENT PERFORMANCE

In this period, every segment – with the exception of beverages segment - experienced a value growth, although compared to last year the growth has mostly slowed down.

5 DO YOU KNOW?

Penetration growth for male targeted personal care products are growing, even higher than products targeted for woman.

1 KEY INDICATOR

MACRO TREND

Compared to October 2016, ID inflation in November 2016 experienced a controllable increase from 3.31% to 3.58%.

+3.58%
CPI

Exchange Rate
Vs Year Ago
2.6%

GDP
+ 5.02%

Indonesia Q3 2016 GDP growth is 5.02%, slightly above expectations (Trading Economics) at 5.0 percent, though a little bit slower than Q2 GDP (5.18%).

Rupiah exchange rate to USD weakened by 2.3% in November 2016 compared to a month ago. Compared to last year the exchange rate strenghten 2.6%.
The average rate for USD is Rp 13,377- in November 2016

Source : *BPS and Bank Indonesia*

FMCG TREND

FMCG NOVEMBER 2016
ANNUAL GROWTH

+4.5%

Total National Indonesia FMCG value managed to grow 4.5% in November 2016 vs last year. The growth increased by 0.1% compared to last month.

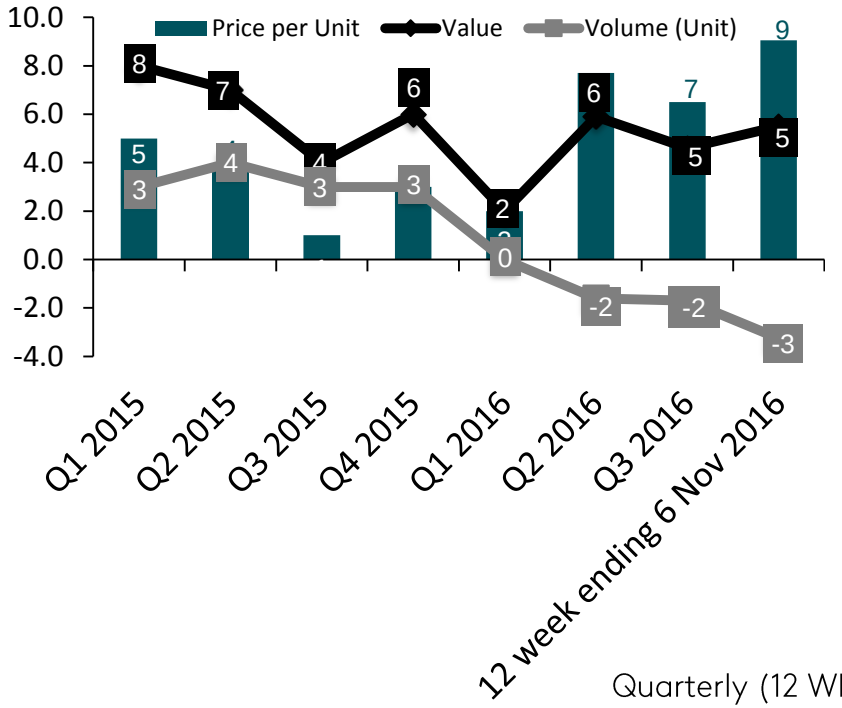
Source : *Kantar Worldpanel Indonesia | Household Panel (52 week ending 6 Nov 2016) vs. Year Ago*

2 FMCG INDICATOR

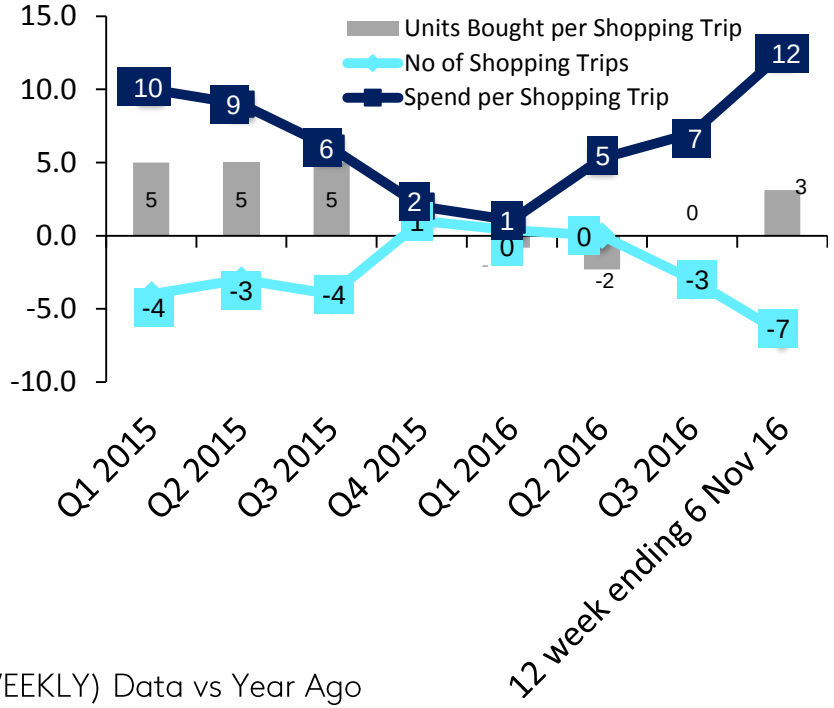
Although price continues to increase and consumers have to spend more to get the same basket of goods, consumers are increasing the size of their basket per trip.

QUARTERLY GROWTH VS YEAR AGO

VALUE VOLUME, AND PRICE



FREQUENCY, UNITS BOUGHT AND SPEND PER TRIP



Quarterly (12 WEEKLY) Data vs Year Ago

NOVEMBER 2016 YEARLY OUTLOOK

	OCT 2015	OCT 2016
Value %	9.2%	4.4%
Volume % (units)	3.9%	-0.3%
Price per unit	5.2%	4.8%
Frequency	-3.1%	-0.7%

Yearly (52 WEEKLY) Nov 2016 Data vs Year Ago

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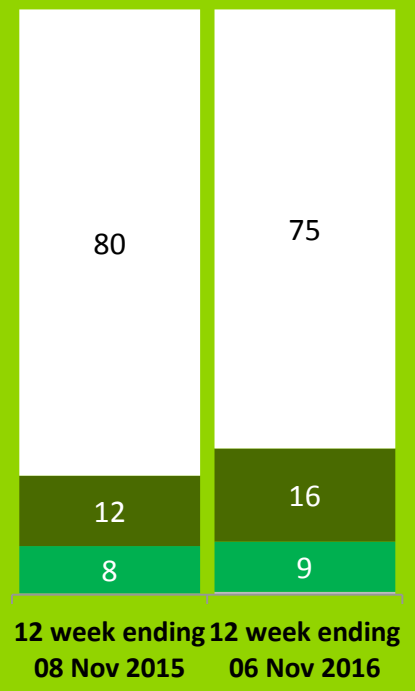
Source : *Kantar Worldpanel Indonesia – Total National Indonesia - Household Panel – Total FMCG*

3 RETAILER SNAPSHOT

VALUE SHARE%



- Total Traditional Trade
- Minimarket
- Hypermarket+Supermarket
- Others MT

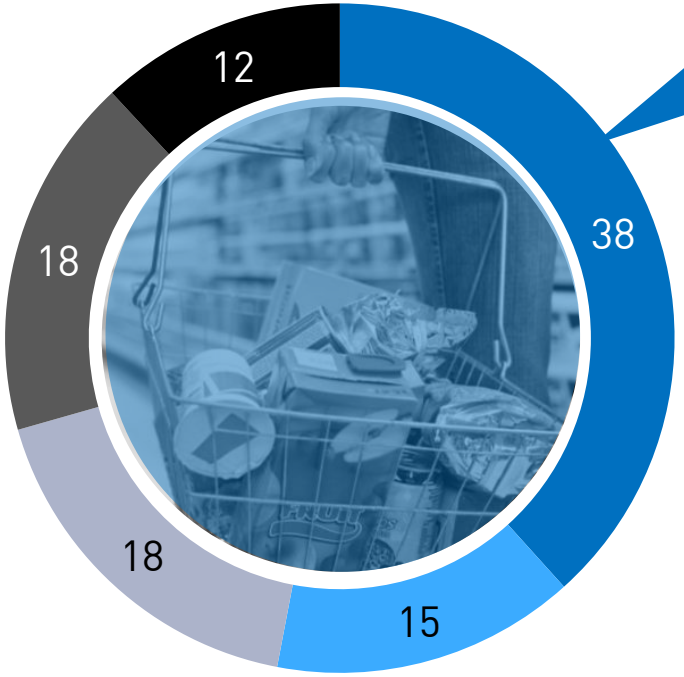
In November 2016, the importance of Modern Trade is felt strongly as compared to last year it has grown more in total value share.

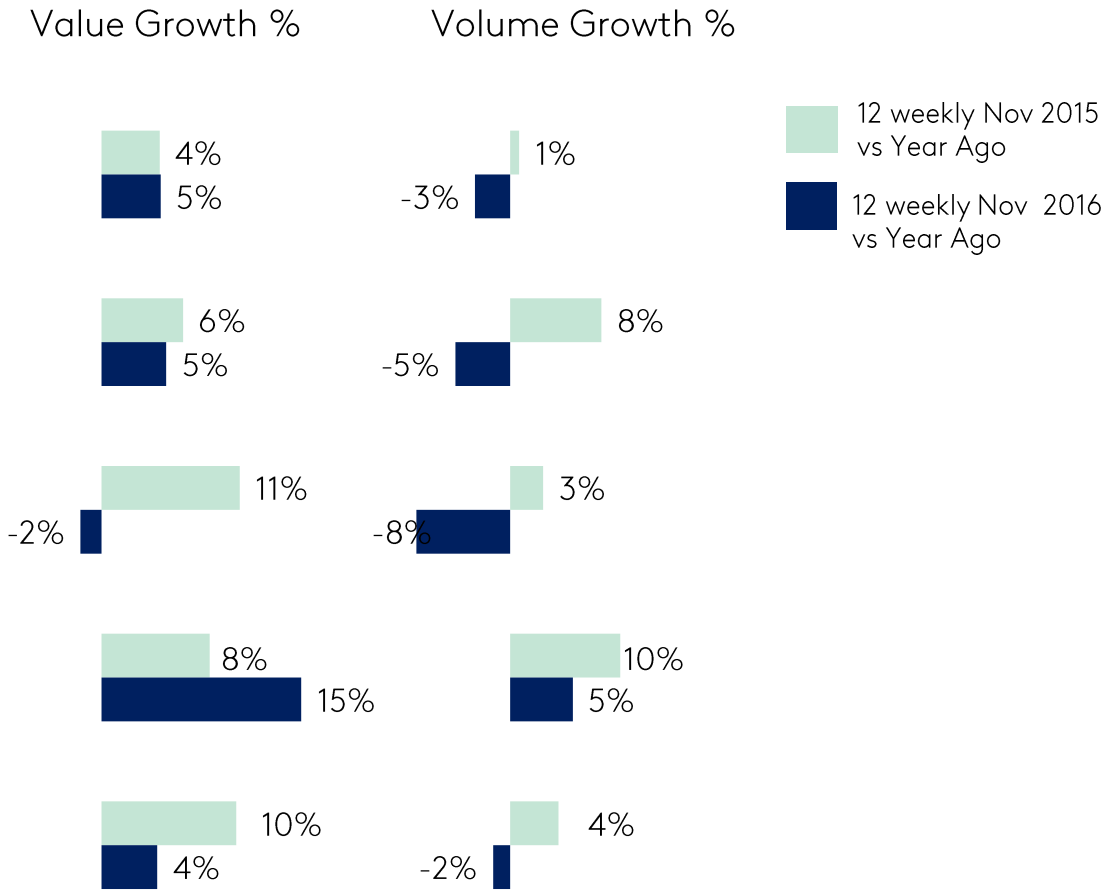
Source : *Kantar Worldpanel Indonesia – Household Panel – Total FMCG*

4 SEGMENT PERFORMANCE

In this period, every segment – with the exception of beverages segment - experienced a value growth, although compared to last year the growth has mostly slowed down. Volume wise, personal care is the one that is still growing.

Segment value % contribution

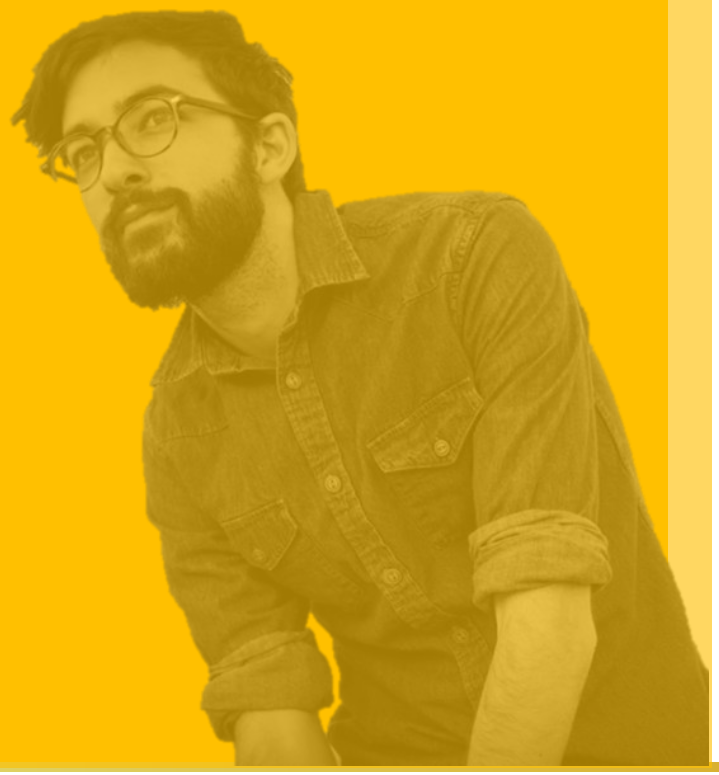




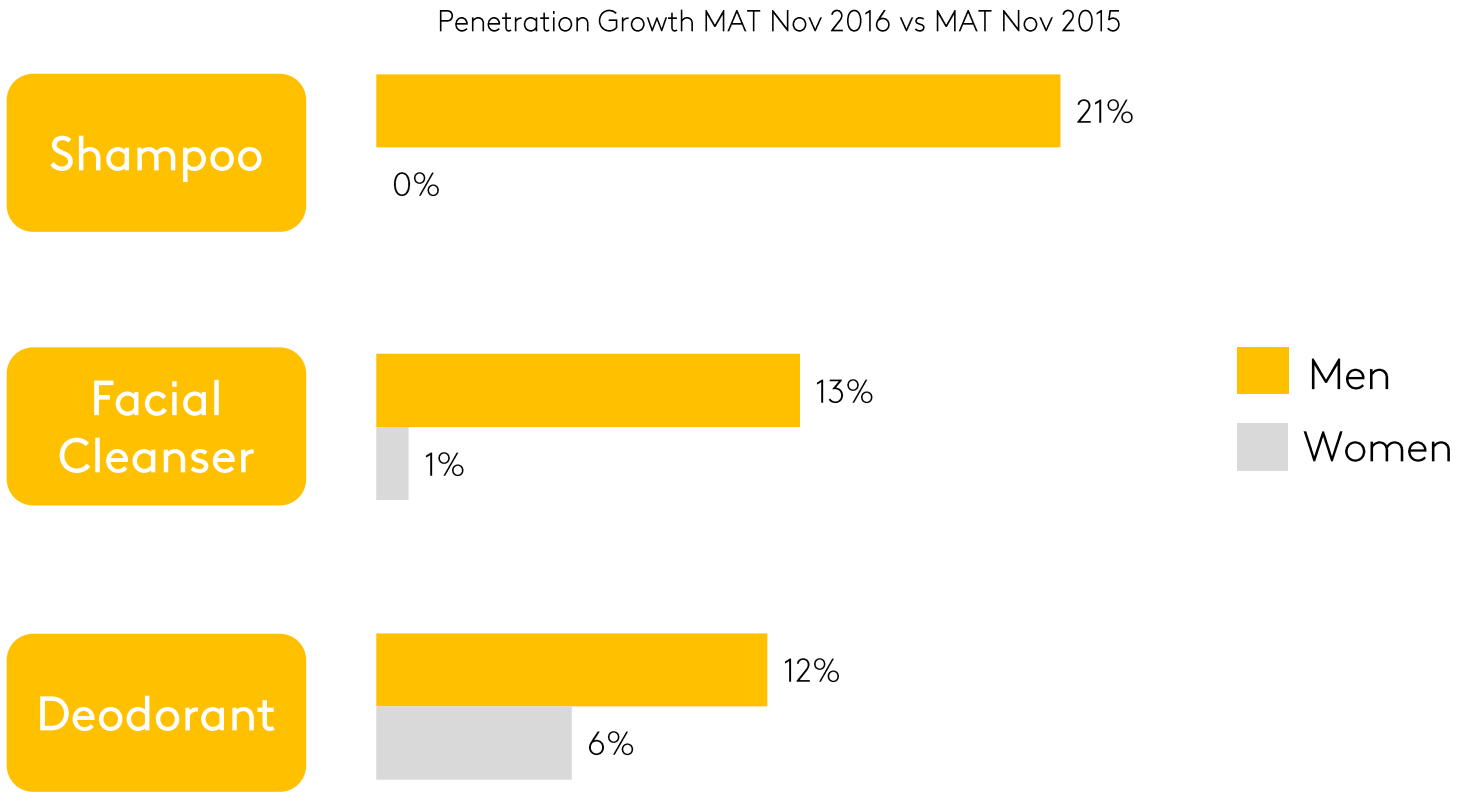
Indonesia National, 12 Week Ending 6 Nov 2016 vs YA, Total FMCG

5 DO YOU KNOW?

Male targeted products are on the rise.



Penetration growth for male targeted personal care products are growing, even higher than products targeted for woman. This trend showed that consumers are now looking for products that are more relevant to themselves and meet their individual needs.



Source: Kantar Worldpanel – Households Panel – National Indonesia – MAT Nov 2016 vs YA

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ABOUT KANTAR WORLDPANEL

Kantar Worldpanel is the global expert in shoppers' behavior. Through continuous monitoring, advanced analytics and tailored solutions, Kantar Worldpanel inspires successful decisions by brand owners, retailers, market analysts and government organizations globally.

With over 60 years' experience, a team of 3,500, and services covering 60 countries directly or through partners, Kantar Worldpanel turns purchase behavior into competitive advantage in markets as diverse as FMCG, impulse products, fashion, baby, telecommunications and entertainment, among many others. Kantar Worldpanel is part of the Kantar, one of the world's largest insight, information and consultancy networks. Kantar is the data investment management division of WPP.

In Indonesia, Kantar Worldpanel – Inspiring Successful Decision™ 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
Wisma Metropolitan 2 7th Floor, JL Jendral Sudirman Kav 29-31, Jakarta, 12920

fanny.murhayati@kantarworldpanel.com
dwiki.pradipto@kantarworldpanel.com
www.kantarworldpanel.com/id

Kantar Worldpanel Indonesia
@KWP_ID