DECEMBER
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 5.2% in December vs last year. The growth has increased from 4.5% last month.

2 FMCG INDICATOR

Shoppers are still holding their shopping trips frequency, but they spend more during their shopping trip.

3 RETAILERS SNAPSHOT

In December 2016, Modern Trade continues to increase its importance in Indonesia, driven mainly by Minimarket growth

4 SEGMENT PERFORMANCE

Personal Care segment has maintained its high growth, followed by the Dairy segment as the relevance continue to increase.

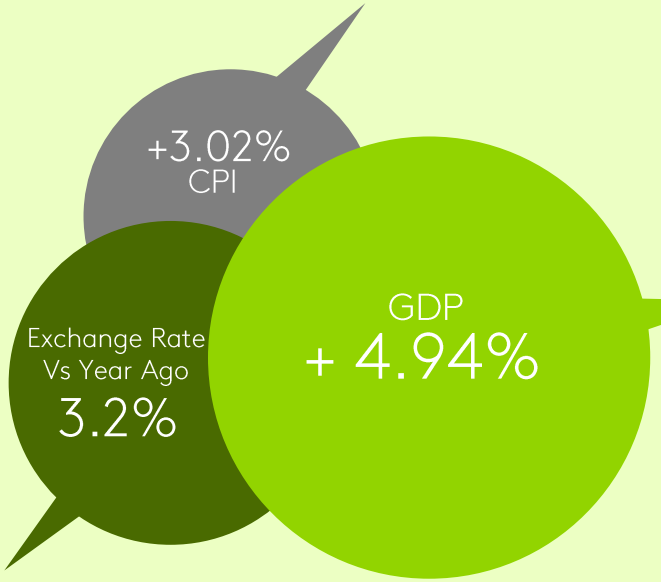
5 DO YOU KNOW?

Buyers prefers to buy more than 100 ML of Fabric Conditioner in sachet formats even though there are bigger pack size in pouch/bottle..

1 KEY INDICATOR

MACRO TREND

Compared to November 2016, ID inflation in December 2016 has slowed down to 3.02%



Indonesia Q4 2016 GDP growth is 4.94%, a little bit slower than Q3 GDP (5.02%).

Rupiah exchange rate to USD weakened by 0.8% in December 2016 compared to a month ago. Compared to last year the exchange rate strenghten 3.2%.
The average rate for USD is Rp 13,485- in December 2016

Source : *BPS and Bank Indonesia*

FMCG TREND

FMCG DECEMBER 2016
ANNUAL GROWTH

Total National Indonesia FMCG value managed to grow 5.2% in December vs last year. The growth has increased from 4.5% last month.

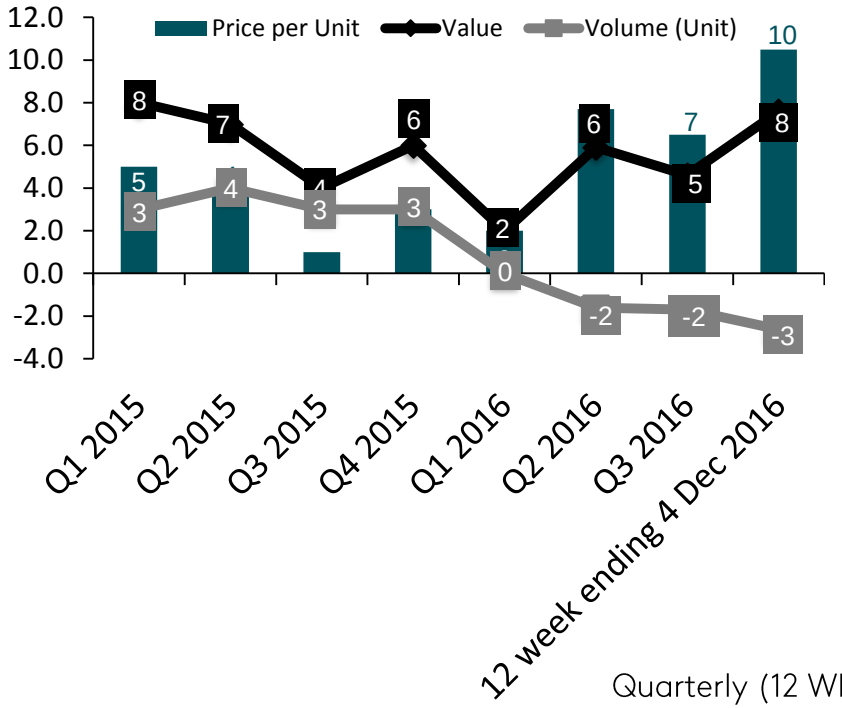
Source : *Kantar Worldpanel Indonesia | Household Panel (52 week ending 6 Nov 2016) vs. Year Ago*

2 FMCG INDICATOR

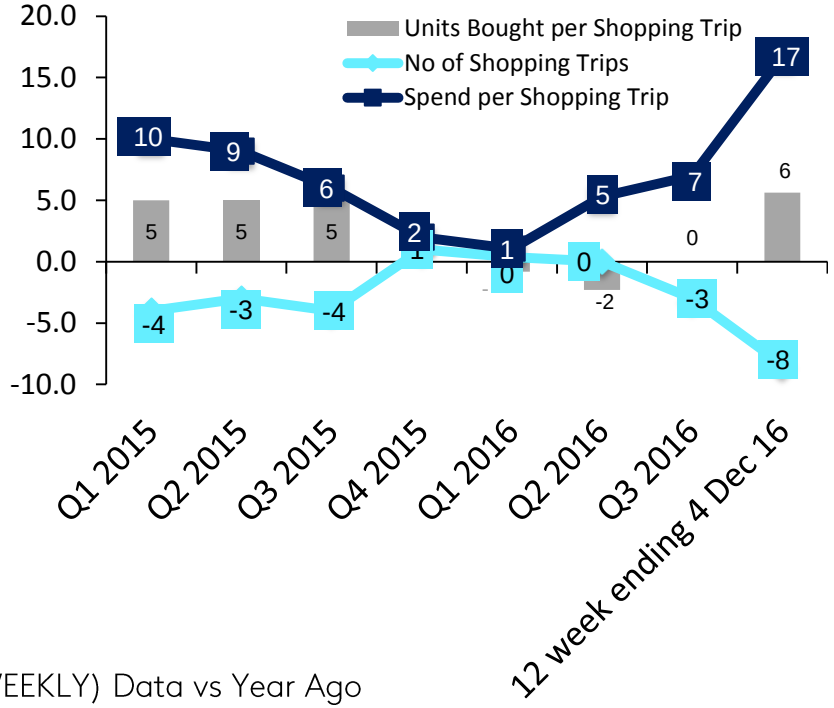
Shoppers are still holding their shopping trips frequency, but they spend more during their shopping trip.

QUARTERLY GROWTH VS YEAR AGO

VALUE VOLUME, AND PRICE



FREQUENCY, UNITS BOUGHT AND SPEND PER TRIP



Quarterly (12 WEEKLY) Data vs Year Ago

DECEMBER 2016 YEARLY OUTLOOK

	DEC 2015	DEC 2016
Value %	7.5%	5.2%
Volume % (units)	3.3%	-1.1%
Price per unit	4.0%	6.3%
Frequency	-3.1%	-2.3%

Yearly (52 WEEKLY) Dec 2016 Data vs Year Ago

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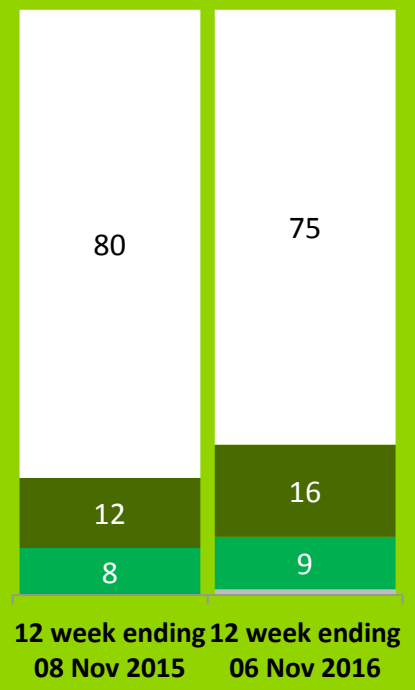
Source : *Kantar Worldpanel Indonesia – Total National Indonesia - Household Panel – Total FMCG*

3 RETAILER SNAPSHOT

VALUE SHARE%



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

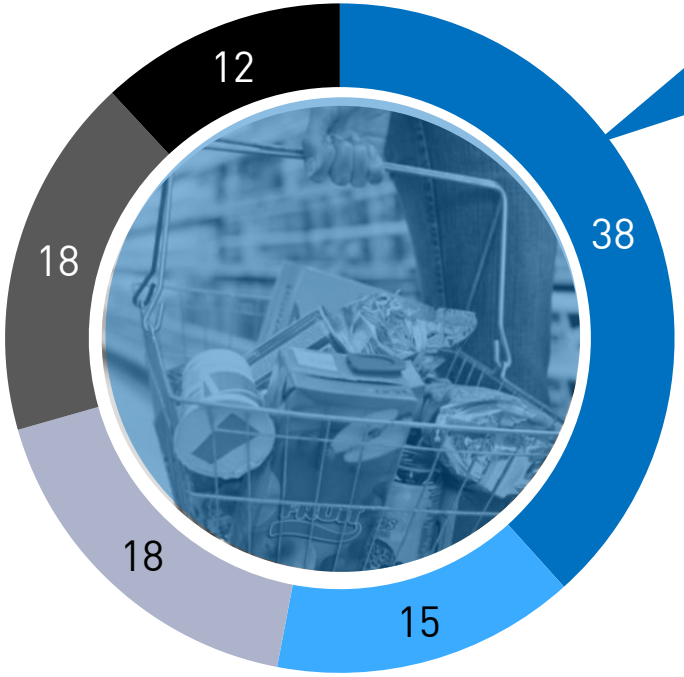
In December 2016, Modern Trade continues to increase its importance in Indonesia, driven mainly by Minimarket growth

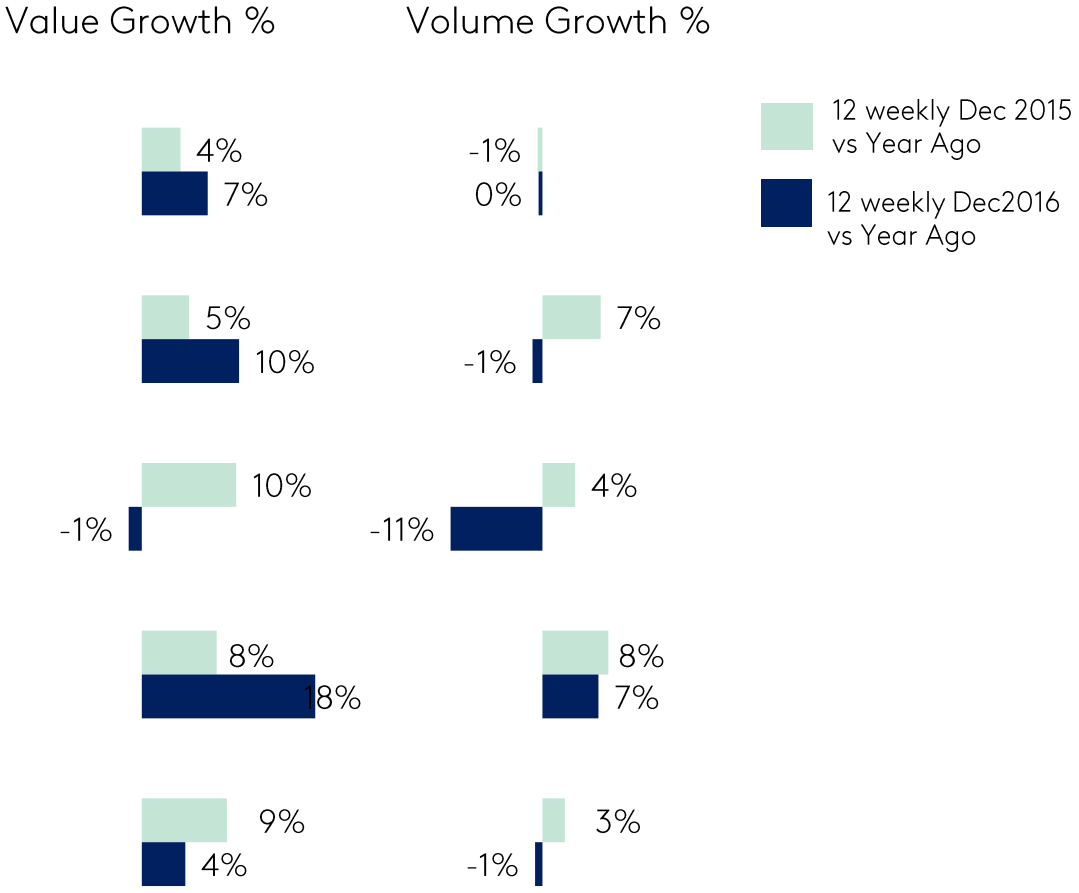
Source : *Kantar Worldpanel Indonesia – Household Panel – Total FMCG*

4 SEGMENT PERFORMANCE

Personal Care segment has maintained its high growth, followed by the Dairy segment as the relevance continue to increase

Segment value % contribution





Indonesia National, 12 Week Ending 04 Dec 2016 vs YA, Total FMCG

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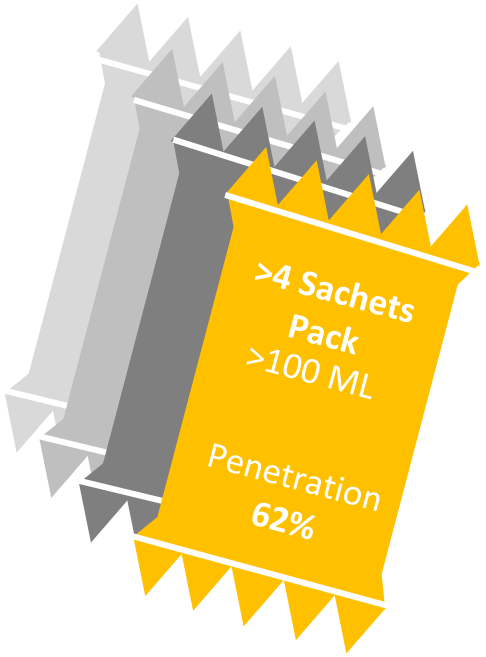
5 DO YOU KNOW?

Buyers prefers to buy more than 100 ML of **Fabric Conditioner** in sachet formats even though there are bigger pack size in pouch/bottle. People choose to buy sachet as it is easier to control their usage compared to using bottles or pouches



Consumers bought
50 ml (2 sachets) more Fabric Conditioner
In Dec 2016

VS

Consumers bought
5 ml more Fabric Conditioner
In Dec 2016

Source: Kantar Worldpanel – Households Panel – National Indonesia – MAT Dec 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

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