JULY

2017

FMCG MONITOR

An integrated view of Indonesia FMCG market

KANTAR WORLDPANEL

EXECUTIVE SUMMARY

1 KEY MARKET INDICATOR

National Indonesia FMCG value managed to grow 8.6% in July 2017

2 FMCG INDICATOR

Post festive season resulting in a declining value growth

3 RETAILERS SNAPSHOT

As Modern Trade continues to grow, Traditional trade loses share in total FMCG market

4 SEGMENT PERFORMANCE

Dairy and Personal Care still leads total FMCG segment

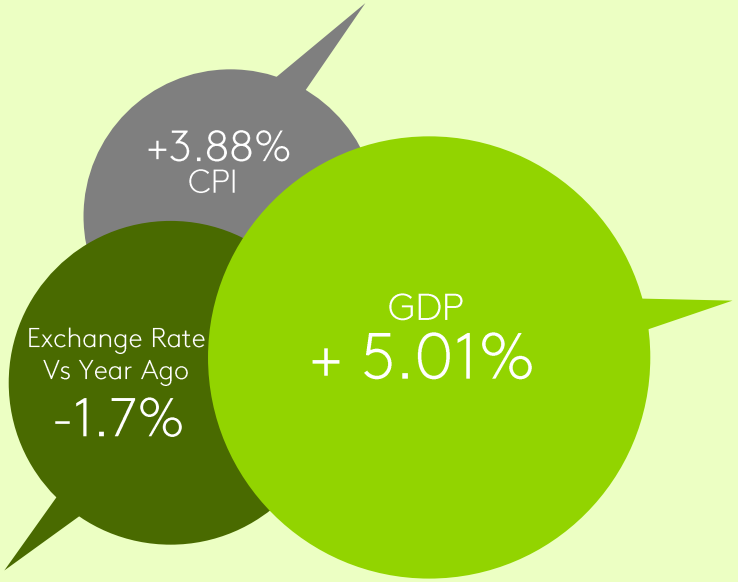
5 DO YOU KNOW?

Find out FMCG performance in 2017 Festive Season

1 KEY INDICATOR

MACRO TREND

Inflation has come down to 3.88% after reaching 4.37% on previous periode as a result of festive season.



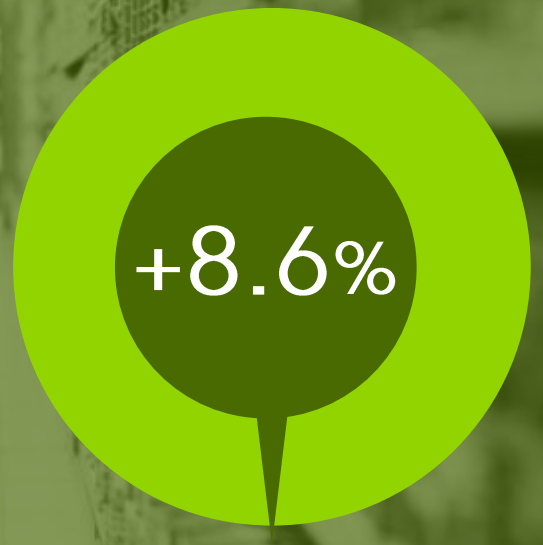
Indonesia Q2 2017 GDP growth is 5.01%, holding steady from the performance in the previous quarter

Rupiah exchange rate to USD is weakened by 1.7% in July 2017 compared to last year while remaining stable compared to last month

Source : *BPS and Bank Indonesia*

FMCG TREND

FMCG
July 2017
ANNUAL GROWTH



Total National Indonesia FMCG value managed to grow 8.6% in July 2017 compared to last year, slowed down from 9.5% last month

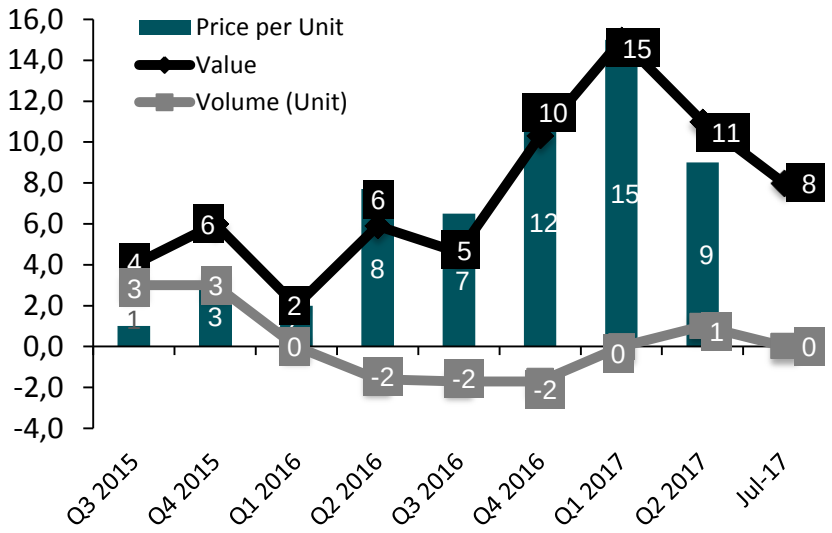
Source : *Kantar Worldpanel Indonesia | Household Panel (52 week ending 16 July 2017) vs. Year Ago*

2 FMCG INDICATOR

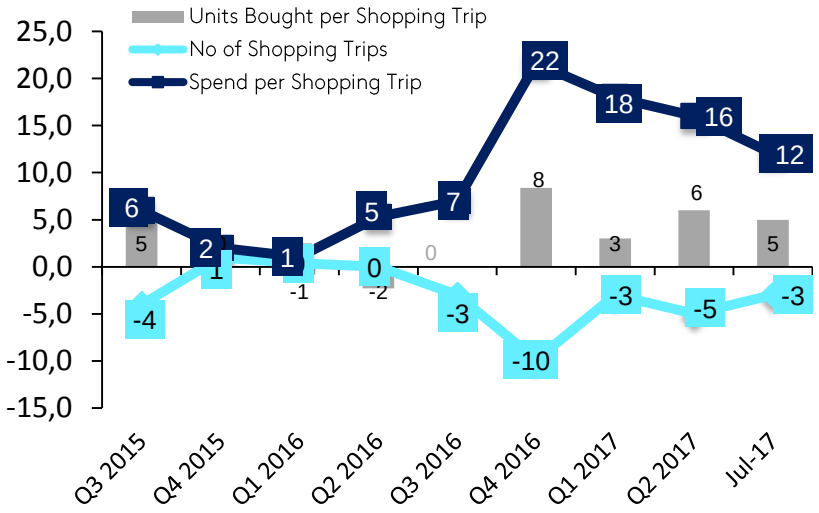
In accordance with the end of festive season, price is stabilizing and consumer's spending is back to normal, resulting in a decreased value growth compared to previous period.

QUARTERLY GROWTH VS YEAR AGO

VALUE VOLUME & PRICE



FREQUENCY, UNITS BOUGHT & SPEND PER TRIP



Quarterly (12 WEEKLY) Data vs Year Ago

JULY 2017 OUTLOOK

	MAT July '16	MAT July '17
Value %	5.2%	8.6%
Volume % (units)	1.3%	-0.8%
Price per unit	3.9%	9.5%
Frequency	-0.7%	-5.0%

52 Week Ending July 2017 Data vs Year Ago

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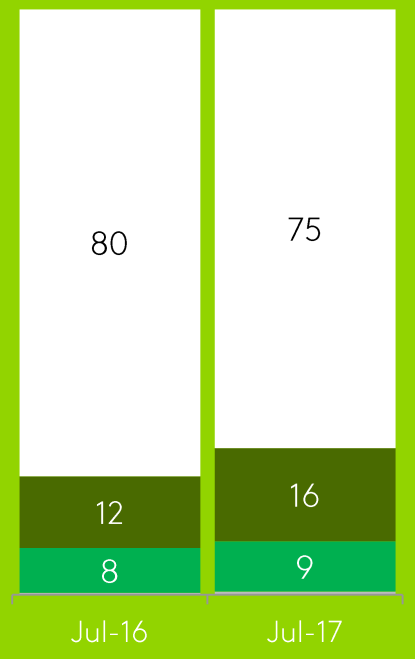
Source : *Kantar Worldpanel Indonesia – Total National Indonesia - Household Panel – Total FMCG In Home Data*

3 RETAILER SNAPSHOT

VALUE SHARE%



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

Traditional trade value shares continues to fall down as buyers now increase spending in Modern Trade which offers increasing promotion, especially price cut and extra volume promotions, bringing more value to each trip

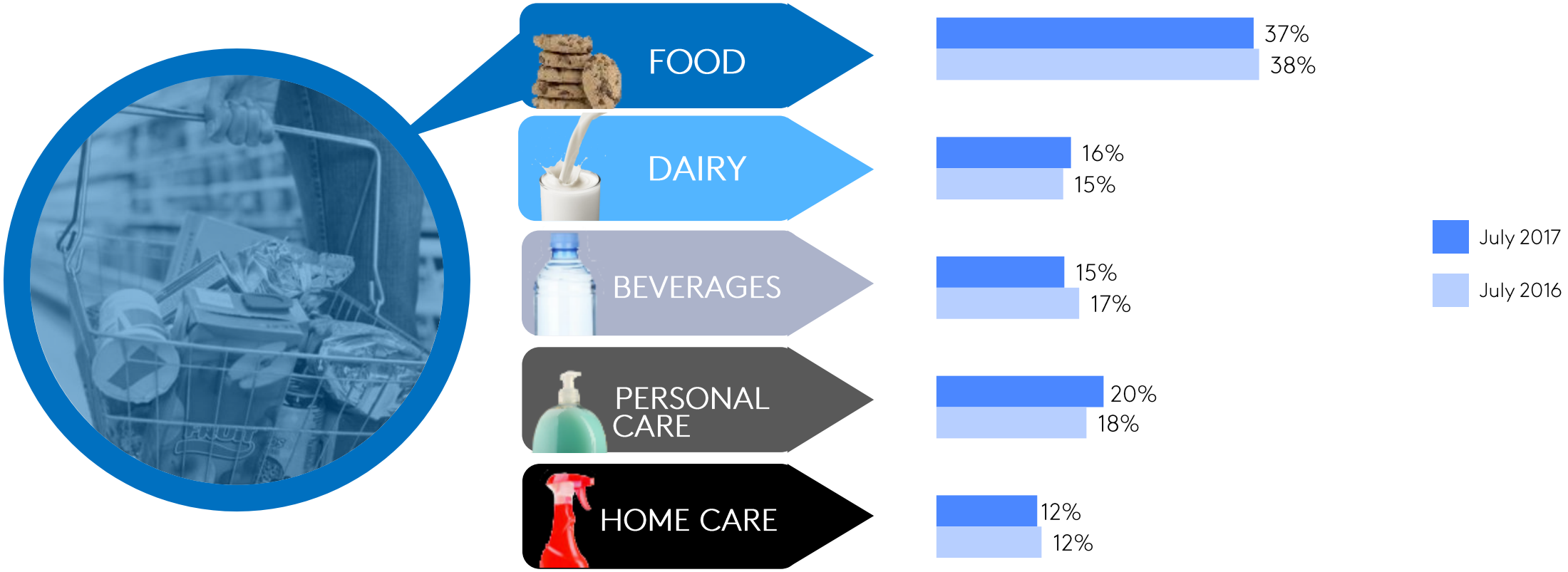
Source : *Kantar Worldpanel Indonesia – Household Panel – Total FMCG*

4 SEGMENT PERFORMANCE

Personal care and dairy sectors steal consumer's share of wallet from other primary sectors. Increasing consumption in premium categories, e.g. baby diapers and yoghurt, attributes to the rising performance in the two sectors.

VALUE CONTRIBUTION TO TOTAL FMCG (%)

Jul 2017 vs 2016

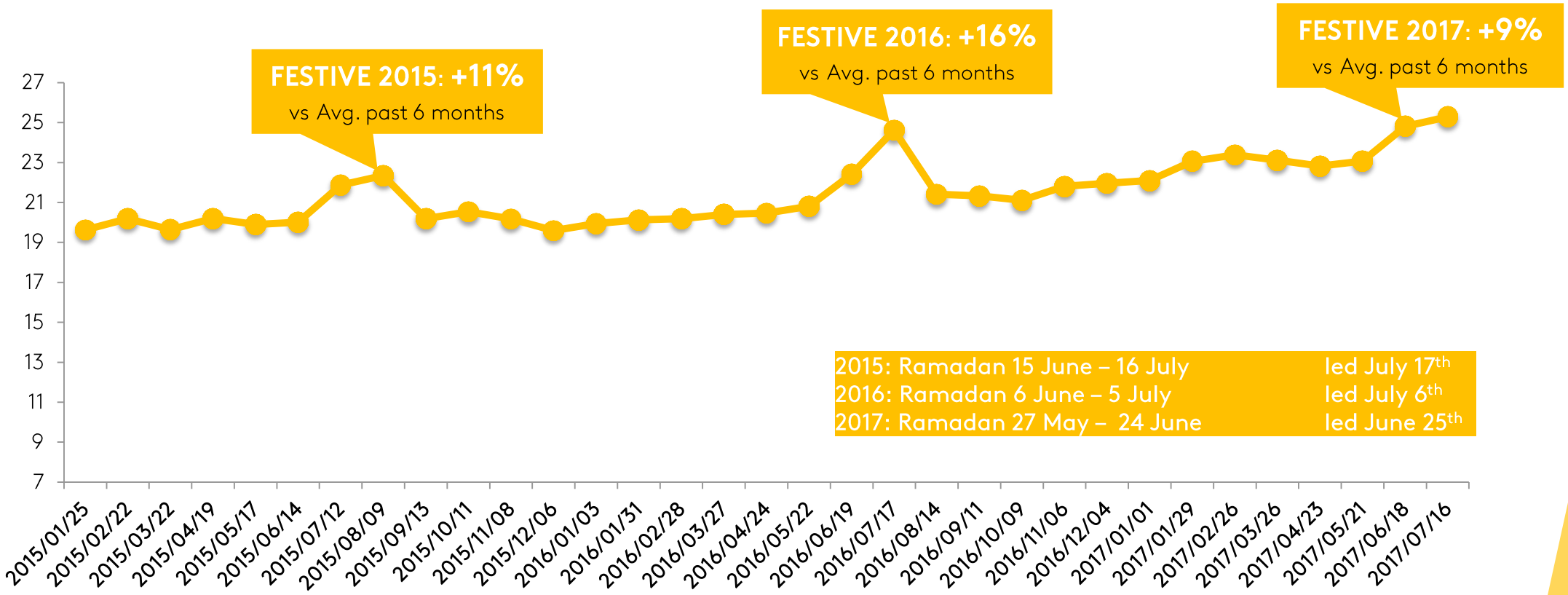


Indonesia National, 52 Week Ending 16 July 2017 vs July 2016 vs July 2015, Total FMCG

5 DO YOU KNOW?

Compared to previous years, spending in Festive 2017 shows a lower increment at 9%, compared to the average of the previous 6 months

FMCG – 4 WEEKLY SALES VALUE IN TRILLION IDR



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5 DO YOU KNOW?

2017's festive is driven by the lower class households, while within the typical festive categories, syrup and margarine are gaining the most of the season – performing higher than previous year.

SPENDING GROWTH %
VS AVERAGE 6 MONTHS BEFORE FESTIVE (2017)
NATIONAL INDONESIA

SPENDING GROWTH DIFFERENCE %
VS AVERAGE 6 MONTHS BEFORE FESTIVE
(2017 VS YA)
NATIONAL INDONESIA

SYRUP CORDIALS
+242%

CHEESE
-41%

MARGARINE
+15%

SOFT DRINK
+66%

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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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