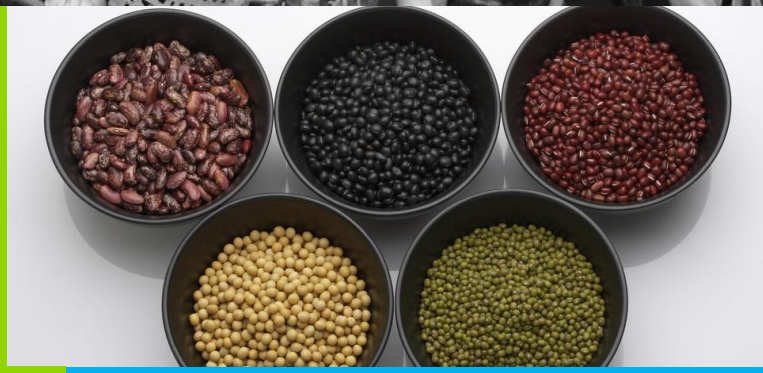
FMCG MONITOR

An integrated view of Indonesia FMCG market



Nov

2013

#Data up to P11 2013

KANTAR WORLDPANEL

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executive SUMMARY

1

Inflation in November edged up 0.12% on October, bringing the cumulative figure for the year so far to 7.79% — or 8.37% year-on-year

The slight rise in inflation was more a factor of the **electricity rate hike**, that contributed around 0.09% month-on-month out of total inflation

2

Indonesia's FMCG growth keeps slowing down, despite the positive trend by 7% growth in urban versus last year

Foods and beverages segment are the lowest in term of growth, whilst Personal Care and Dairy continue to lead the market in both Urban and Rural with two digits growth year on year.

3

White coffee shows excellent growth in Urban, especially in expanding into more consumers, with **more than 3.2 million households recruited** in the latest 3 months versus year ago.

This buyer incremental successfully lifted the total value of white coffee by more than 46%.

4

Minimarket grows by two-digits this period and also **the share slightly increase** in Urban versus the same period last year.

The share incremental of minimarket is followed by slightly decrease in share of traditional trade.

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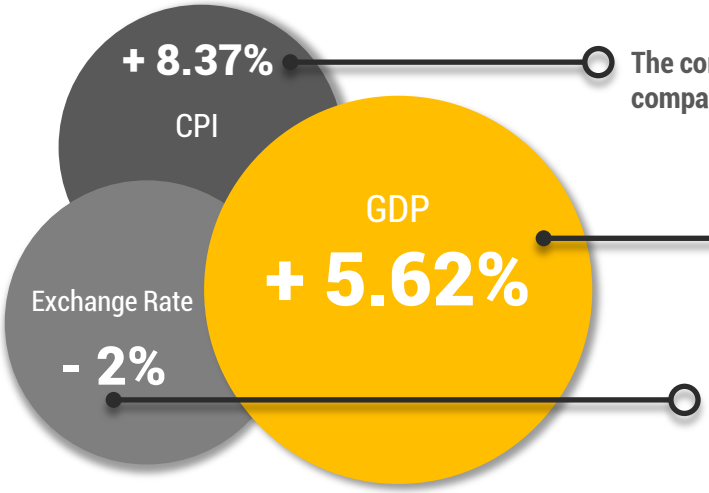
KEY INDICATOR

Macro Trend



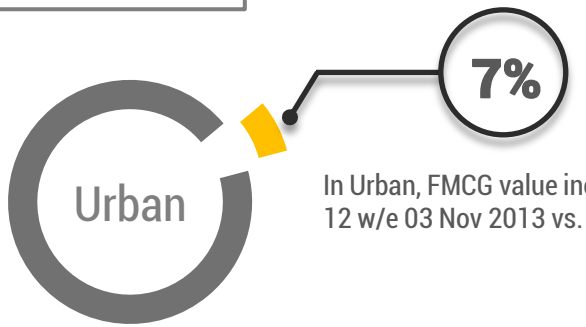
The consumer price index rose 8.37% last month from a year earlier, compared to an 8.32% rise in October

GDP increased 5.62 percent in the Q3 2013 from a year earlier

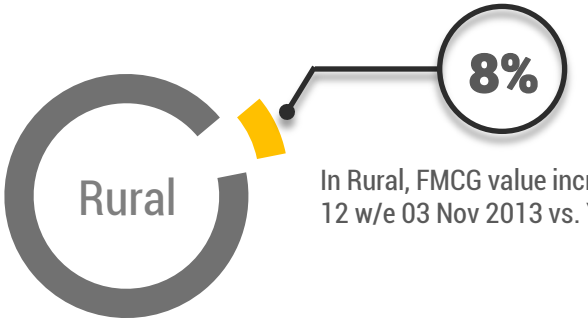
Rupiah exchange rate to USD strengthens to 2% in November 2013 vs. October 2013. The exchange rate increased by 19% in this month vs. YA

Source : *BPS and Bank Indonesia*

FMCG Trend



In Urban, FMCG value increased 7% in 12 w/e 03 Nov 2013 vs. YA



In Rural, FMCG value increased 8% in 12 w/e 03 Nov 2013 vs. YA

Source : *Kantar Worldpanel Indonesia | Household Panel*

*FMCG is excluding rice, sugar, and fresh food

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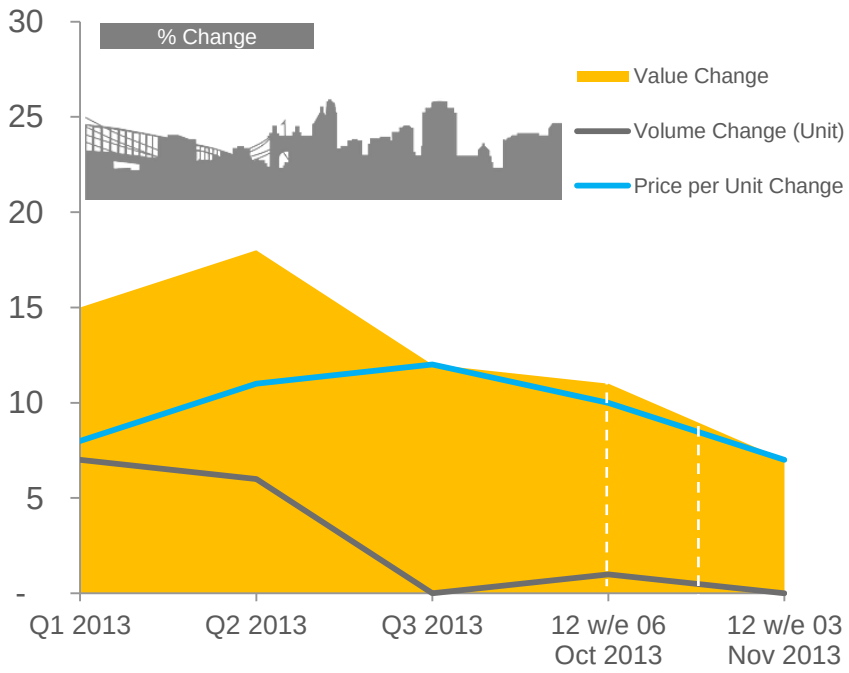
1

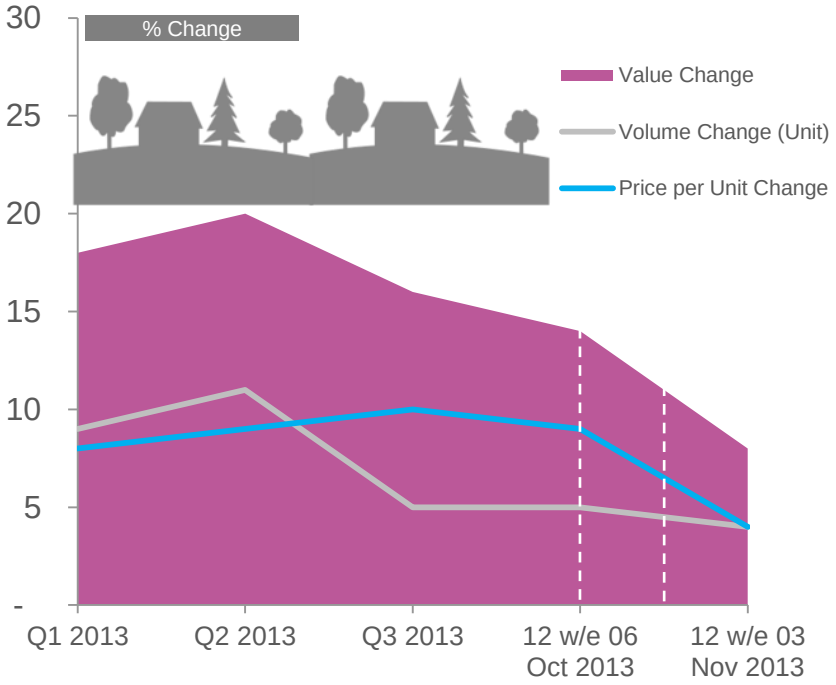
FMCG – 12 WEEKLY YEAR – ON – YEAR CHANGE (%)

Indonesia's FMCG growth is still slowing down since Q3 2013, despite the positive trend on each quarter this year

Urban



Rural



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

*FMCG is excluding rice, sugar, and fresh food

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FMCG SEGMENTS TRENDS – VALUE CHANGE (%)

2 Personal Care and Dairy leads the FMCG market in Urban and Rural

Urban

12 we 03 Nov 2013 vs. YA

Foods	Dairy	Beverages	Home Care	Personal Care
+ 1%	+ 16%	+ 1%	+ 11%	+ 15%

Rural

12 we 03 Nov 2013 vs. YA

Foods	Dairy	Beverages	Home Care	Personal Care
- 2%	+ 20%	+ 3%	+ 21%	+ 26%

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

**Foods are excluding rice, sugar, and fresh food*

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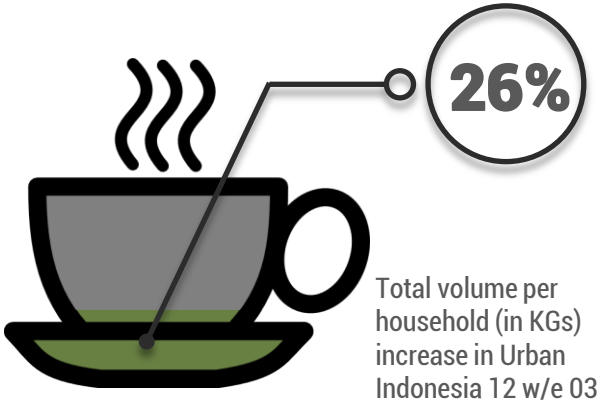
3

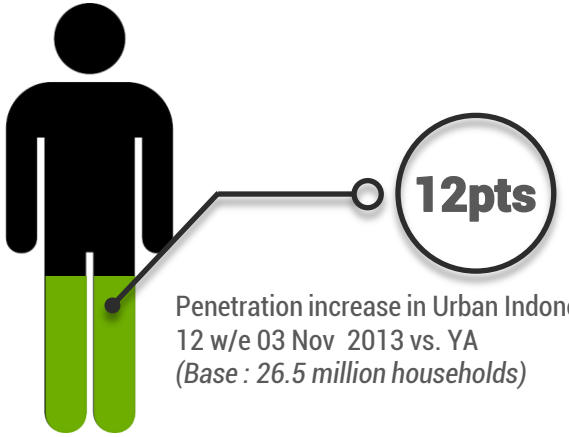
HOT CATEGORIES (URBAN)

White coffee shows excellent growth in Urban, especially in expanding into more consumers

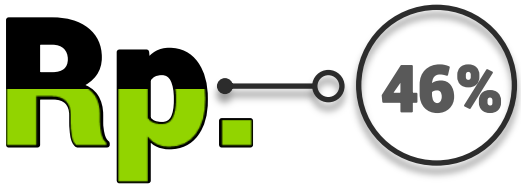
White Coffee



Total volume per household (in KGs) increase in Urban Indonesia 12 w/e 03 Nov 2013 vs. YA



Penetration increase in Urban Indonesia 12 w/e 03 Nov 2013 vs. YA
(Base : 26.5 million households)



Value increase in Urban Indonesia 12 w/e 03 Nov 2013 vs. YA

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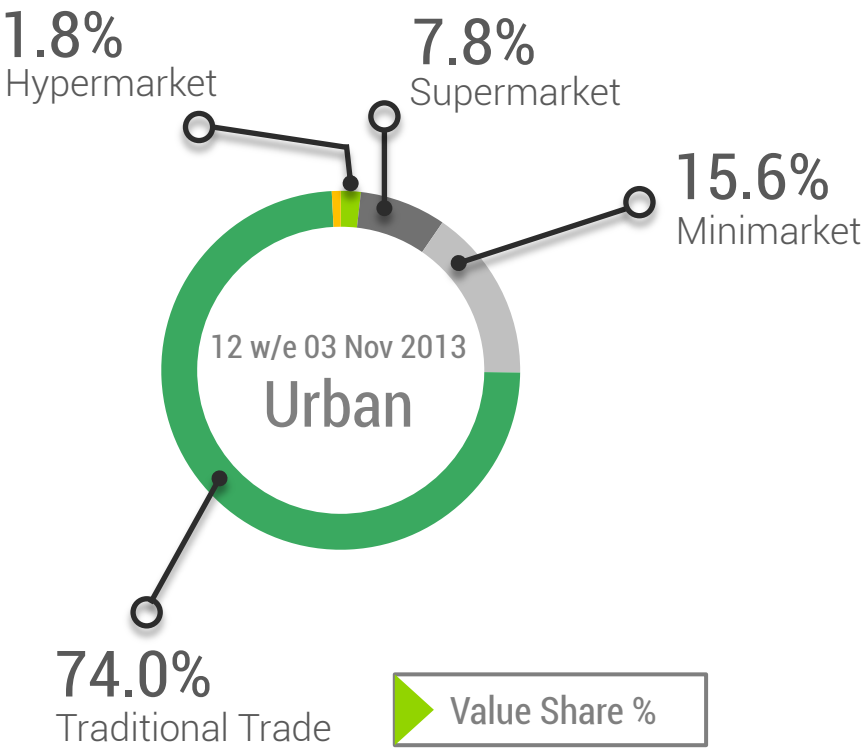
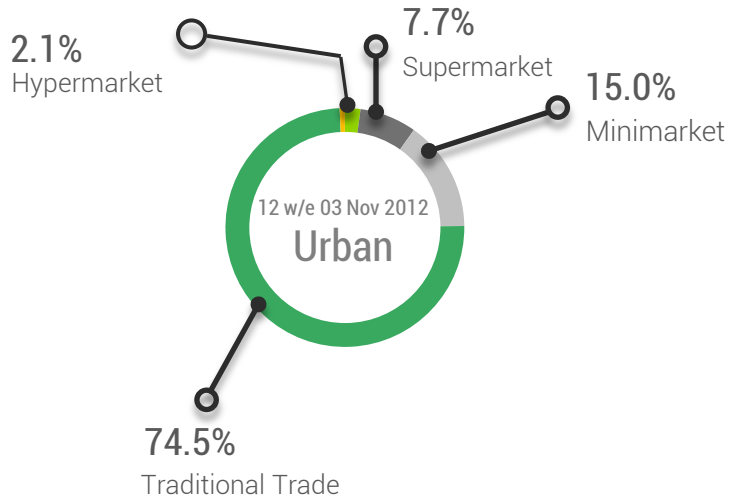
RETAILER

4 RETAILER SNAPSHOT - URBAN



Value Share %



Value Change %

Value Change %	12 w/e 03 Nov 2013 vs. YA
Minimarket	+ 12%
Hyper + Supermarket	+ 5%
Traditional Trade	+ 6%

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

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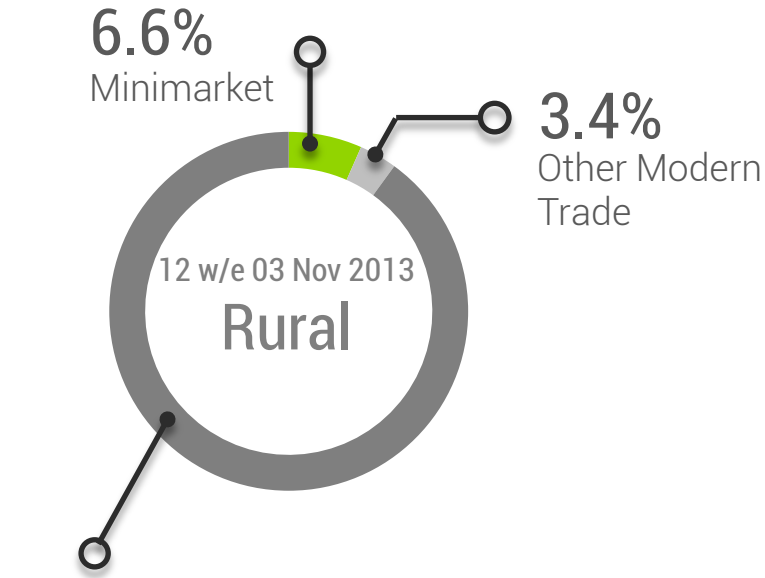
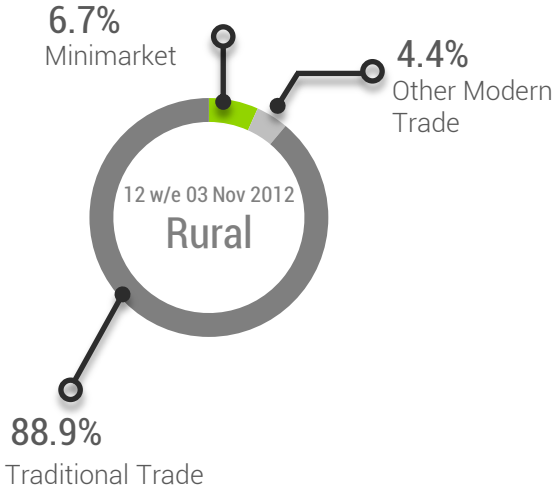
RETAILER

5 RETAILER SNAPSHOT - RURAL



Value Share %



Value Change %

Value Change %	Q3 2013 vs. YA
Minimarket	+ 7%
Traditional Trade	+ 9%

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

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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 49.5 million households.

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

Contact us

Kantar Worldpanel Indonesia
Blok M Plaza 8th Floor | Jl. Bulungan No 76, 12130 | Jakarta Selatan

indonesia@kantarworldpanel.com
www.kantarworldpanel.com/id

Kantar Worldpanel Indonesia @KWP_ID

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