


FMCG MONITOR

An integrated view of Indonesia FMCG market

Sep

2014

#Data up to P09 2014

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executive SUMMARY

1

Consumer Price Index in September 2014 is 0.27% . Current YTD inflation (January – September 2014) is 3.71%. In year on year basis, the CPI rose 4.53%.

In year on year basis, the GDP in second quarter is 5.12%

Rupiah exchange rate to USD weakened to 2% in September 2014 vs. August 2014.

3

Facial Tissue captured a quite big value growth, 44%. The increasing number of households that purchase facial tissue (penetration) boost the category performance. Household consumption increased also drives the category growth

2

FMCG growth is a bit softening both in urban and rural. Reviewing the growth vs. YA, price seems to be the main factor on the value growth. In rural, the value growth pushed by both price increase and organic growth.

Positive movement is captured in all FMCG segments, both in Urban and Rural. Dairy and Home Care are the most growing segment in Rural

4

In Urban, Supermarket showed positive trend versus last year quarter.

Different with Urban, the most growing channel in Rural is Minimarket which grow 34% in terms of value.

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KEY INDICATOR

Macro Trend

+ 3.71%
YTD CPI

GDP
+ 5.12%

Exchange Rate
2%

Consumer Price Index in September 2014 is 0.27% . Current YTD inflation (January – September 2014) is 3.71%. In year on year basis, the CPI rose 4.53%.

In year on year basis, the GDP in second quarter is 5.12%

Rupiah exchange rate to USD weakened to 2% in September 2014 vs. August 2014. The exchange rate weakened by 5% in this month vs. YA

Source : *BPS and Bank Indonesia*

FMCG Trend

Urban
10%

In Urban, FMCG value increased 10% in 12 w/e 2014/09/07 vs. YA

Rural
17%

In Rural, FMCG value increased 17% in 12 w/e 2014/09/07 vs. YA

Source : *Kantar Worldpanel Indonesia / Household Panel*

*FMCG is excluding rice, sugar, and fresh food

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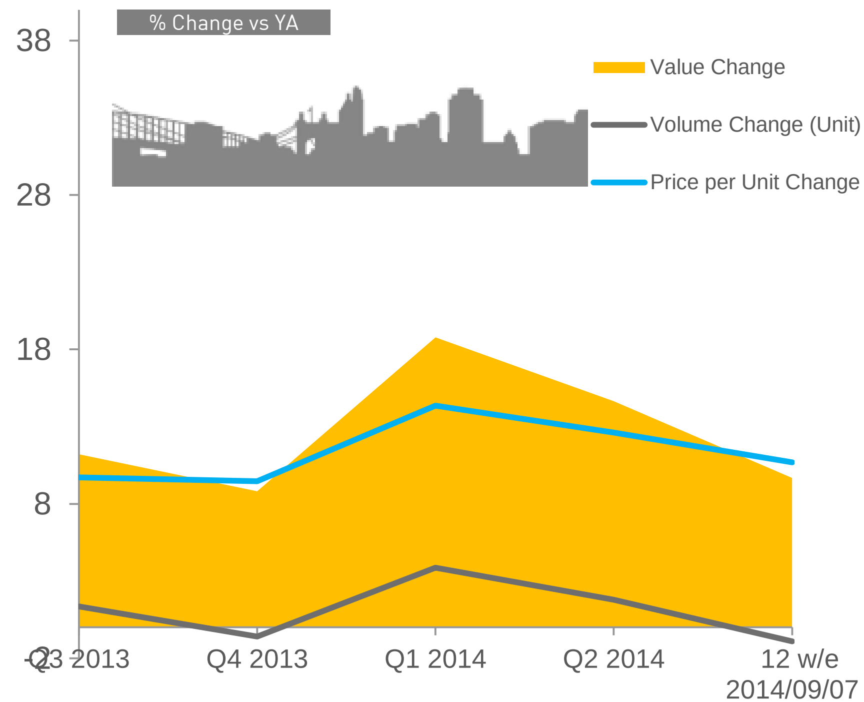
1

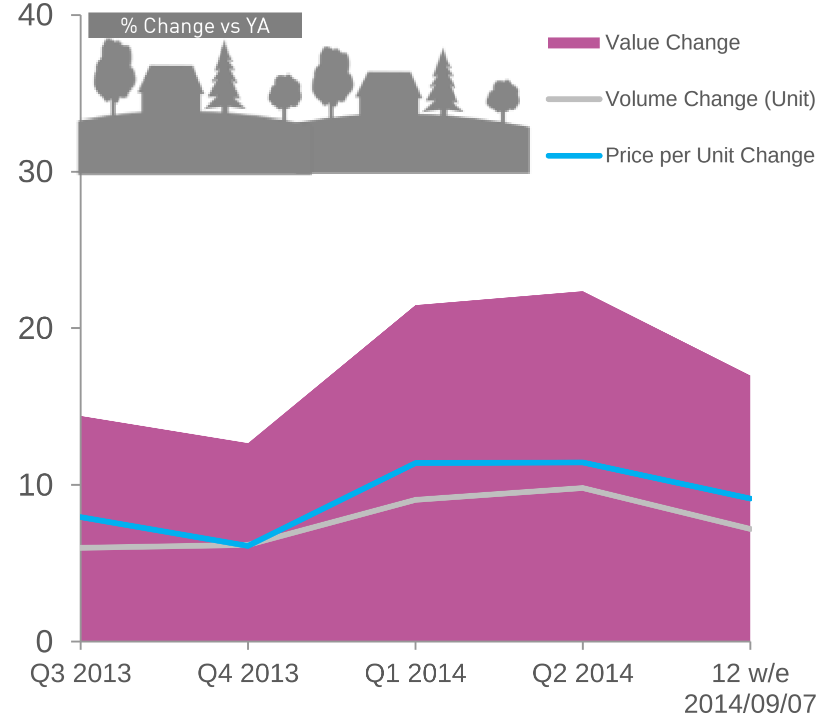
FMCG – 12 WEEKLY YEAR – ON – YEAR CHANGE (%)

FMCG growth is a bit softening both in urban and rural. Reviewing the growth vs. YA, price seems to be the main factor on the value growth. In rural, the value growth pushed by both price increase and organic growth.

Urban



Rural



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

*FMCG is excluding rice, sugar, and fresh food

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2

FMCG SEGMENTS TRENDS – VALUE CHANGE (%)

Positive movement is captured in all FMCG segments, both in Urban and Rural. Dairy and Home Care are the most growing segment in Rural

Urban

12 w/e 2014/09/07 vs. YA

Foods	Dairy	Beverages	Home Care	Personal Care
+11 %	+9 %	+8 %	+12 %	+9 %

Rural

12 w/e 2014/09/07 vs. YA

Foods	Dairy	Beverages	Home Care	Personal Care
+ 14%	+ 28%	+ 12%	+ 21%	+ 18%

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

*FMCG is excluding rice, sugar, and fresh food

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3

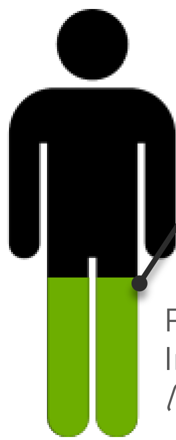
HOT CATEGORIES (URBAN)

Facial Tissue captured a quite big value growth. The increasing number of households that purchase facial tissue boost the category performance. Household consumption increased also drives the category growth

Facial Tissue

36%

Total volume (in sheets) increase in Urban Indonesia
12 w/e 2014/09/07 vs. YA



5.3pts

Penetration increase in Urban Indonesia 12 w/e 2014/09/07 vs. YA
(Base : 26.5 million households)

Rp.

44%

The value growth increased in Urban Indonesia
12 w/e 2014/09/07 vs. YA

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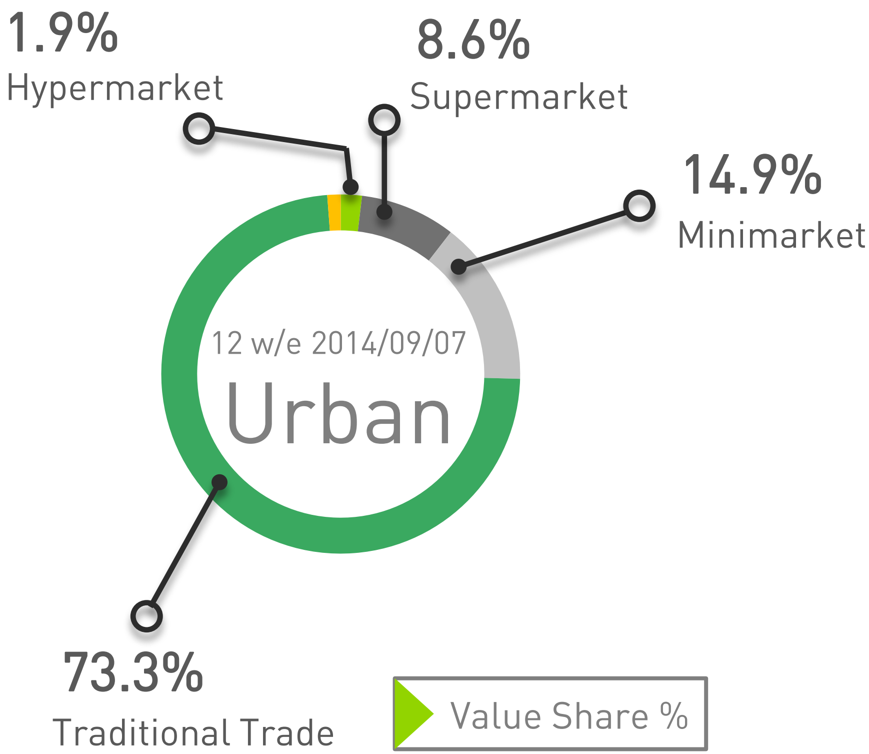
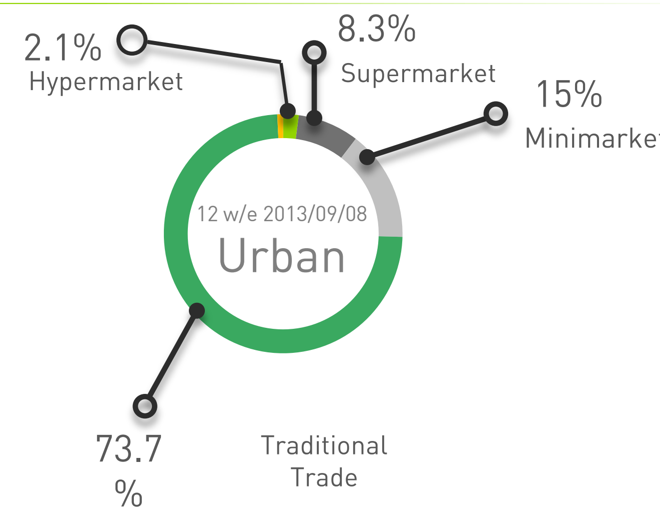
4 RETAILER SNAPSHOT - URBAN



Value Share %

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



Value Change %

Value Change %	12 w/e 2014/09/07 vs. YA
Minimarket	+ 9%
Hyper + Supermarket	+ 11%
Traditional Trade	+ 9%

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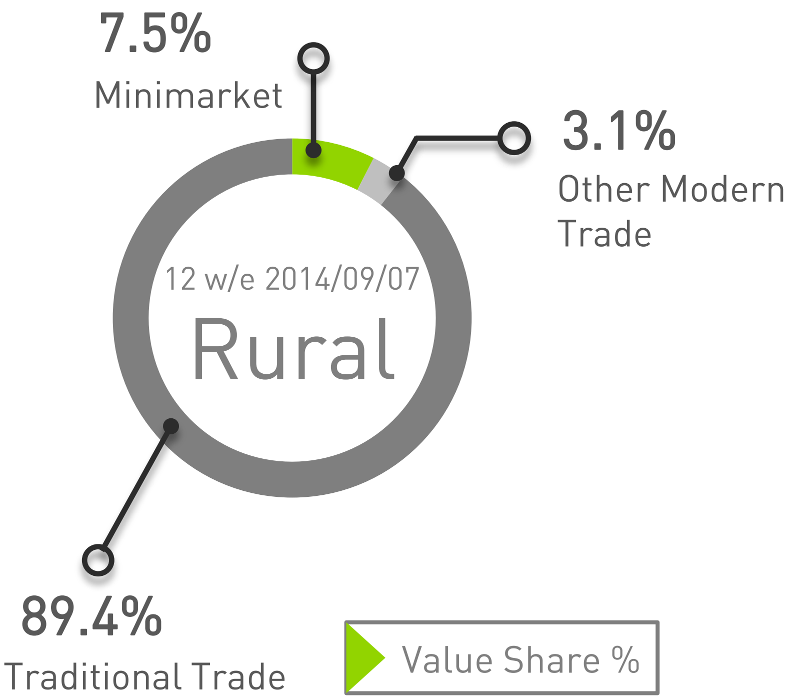
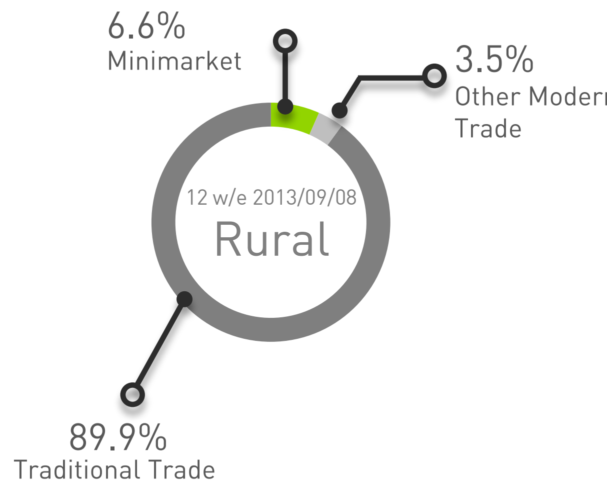
5 RETAILER SNAPSHOT - RURAL



Value Share %

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



Value Change %

Value Change %	12 w/e 2014/09/07 vs. YA
Minimarket	+ 34%
Traditional Trade	+ 16%

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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

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