FMCG MONITOR

An integrated view of Indonesia FMCG market

Feb

2015

KANTAR WORLDPANEL

© Kantar Worldpanel

executive SUMMARY

1

February 2015 opens with a deflation of 0.36% vs January 2015.

The deflation in February 2015 was mainly caused by price paid decreased for some categories such as food, transportation, and communication cost. The decreased price paid of some categories are also the effect of decreased fuel price in January 2015.

2

The decelerating trend in last month still continue in February. FMCG in urban area decelerated as well as in rural area.

Even though some basic needs - such as chili and transportation cost – were decreasing the price, due to fuel price drop, price of FMCG products are generally still increasing, affected consumers to decrease their buying products.

3

Shower gel experienced excellent growth in Urban Indonesia, This category enjoyed big growth contribution from Standing Pouch packaging. This justified that Indonesian Household prefer a value for money product due to its lower price.

4

The share for retailer performance are still similar In Urban, with Mini market still being the biggest contributor in Modern trade, while traditional trade is still the main contributor for amongst trade channels., it's even getting bigger.

Traditional trade also grows by two digits in rural area, We still can see the positive movement for Minimarket in Rural.

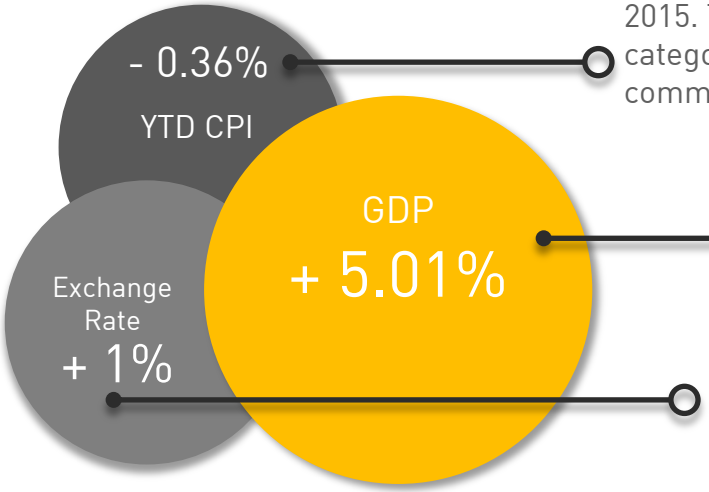
5

During the past year there are several FMCG categories, that are able to attract more buyers. Among those categories there are top 3 categories that grow the most. These categories are coconut milk, facial tissue, and frozen food.

© Kantar Worldpanel

KEY INDICATOR

Macro Trend



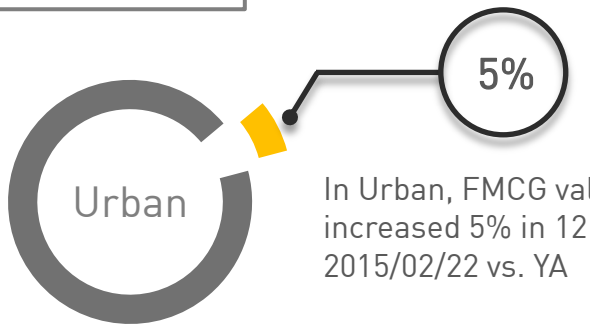
The deflation raised to 0.36% from 0.24% in January 2015. This happened mainly due to lower price for some categories such as food, transportation, and communication cost.

In year on year basis, the GDP in fourth quarter 2014 is 5.01%

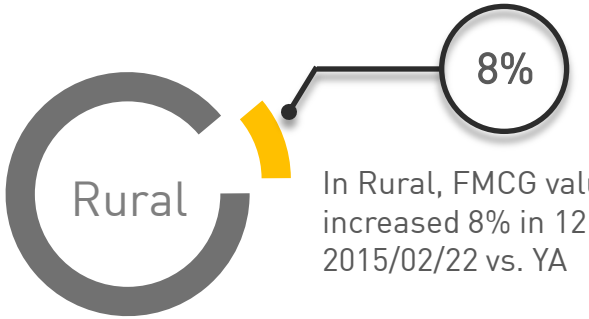
Rupiah exchange rate to USD is still relatively the same in February 2015 vs. January 2015, yet the exchange rate weakened by 7% in this month vs. YA, as the trend for Rupiah value is unfortunately weakened.

Source : *BPS and Bank Indonesia*

FMCG Trend



In Urban, FMCG value increased 5% in 12 w/e 2015/02/22 vs. YA



In Rural, FMCG value increased 8% in 12 w/e 2015/02/22 vs. YA

Source : *Kantar Worldpanel Indonesia | Household Panel*

*FMCG is excluding rice, sugar, and fresh food

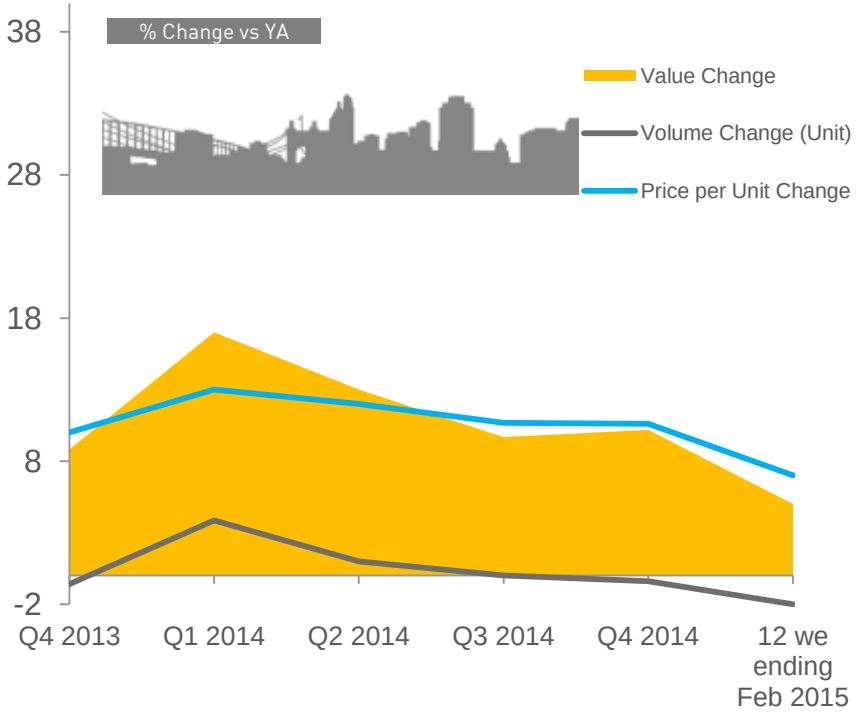
© Kantar Worldpanel

1

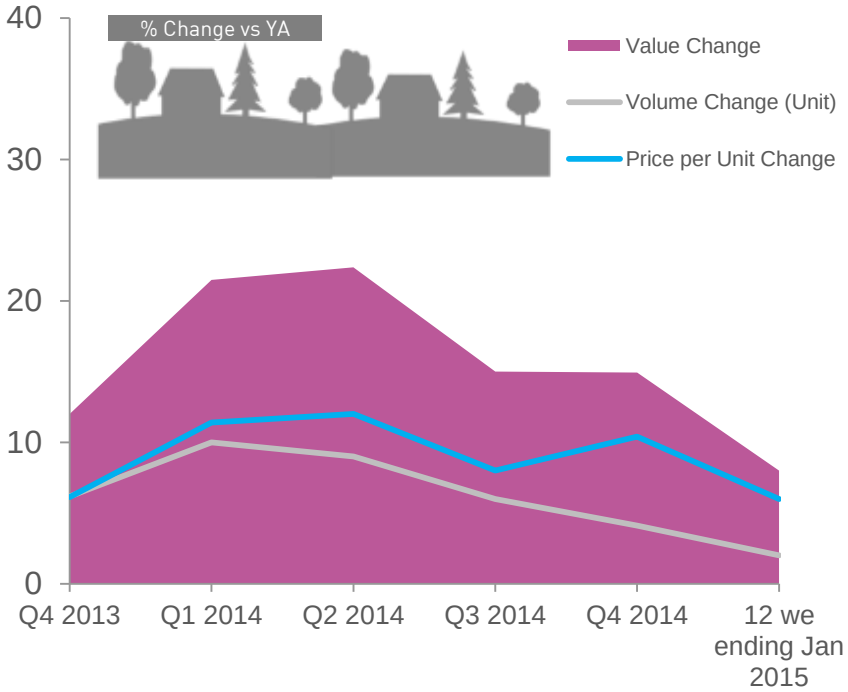
FMCG – 12 WEEKLY YEAR – ON – YEAR CHANGE (%)

The decelerating trend last month still continued in February. FMCG in urban area decelerated as well as in rural area. Even though some basic needs - like chili and transportation cost – were decreasing the price due to fuel price drop, the price of FMCG products are generally still increasing, affected consumers to decrease their buying products.

Urban



Rural



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

*FMCG is excluding rice, sugar, and fresh food

© Kantar Worldpanel

2

FMCG SEGMENTS TRENDS – VALUE CHANGE (%)

Compared to last year, the dairy segment in Urban Area decreased by 1%, while other segments are growing. However, compare to previous month performance, the growth is not better yet both in Urban and Rural.

Urban

12 w/e 2015/02/22 vs. YA

Foods	Dairy	Beverages	Home Care	Personal Care
+4 %	-1 %	+6%	+14 %	+8 %

Rural

12 w/e 2015/02/22 vs. YA

Foods	Dairy	Beverages	Home Care	Personal Care
+ 6%	+ 15%	+ 6%	+ 14%	+ 7%

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

*FMCG is excluding rice, sugar, and fresh food

© Kantar Worldpanel

3

HOT CATEGORIES (URBAN) 12 w/e 2015/01/25

Shower gel experienced excellent growth in Urban Indonesia, This category enjoyed big growth contribution from its standing pouch packaging. This justified that Indonesian household prefer a value for money products due to its lower price.

Shower Gel

10%

Total volume (in L) increase in Urban Indonesia
12 w/e 2015/02/23 vs. YA

2 pts

Penetration increase in Urban Indonesia
12 w/e 2015/02/23 vs. YA
(Base : 27.3 million households)

Rp:

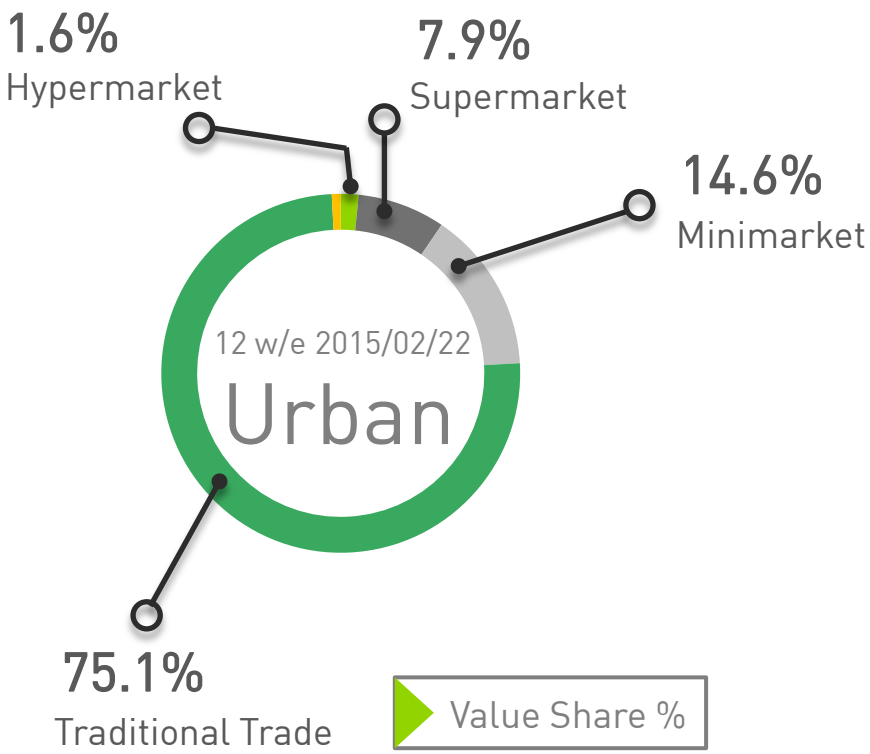
24%

The value growth increased in Urban Indonesia
12 w/e 2015/02/23 vs. YA

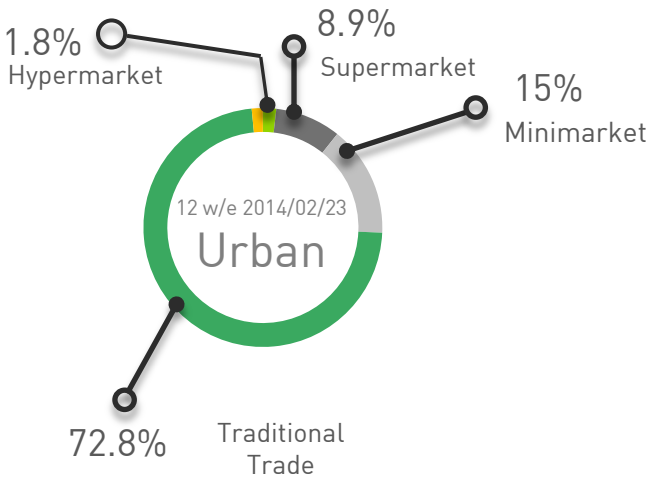
© Kantar Worldpanel

RETAILER

4 RETAILER SNAPSHOT - URBAN



Value Share %



Value Change %

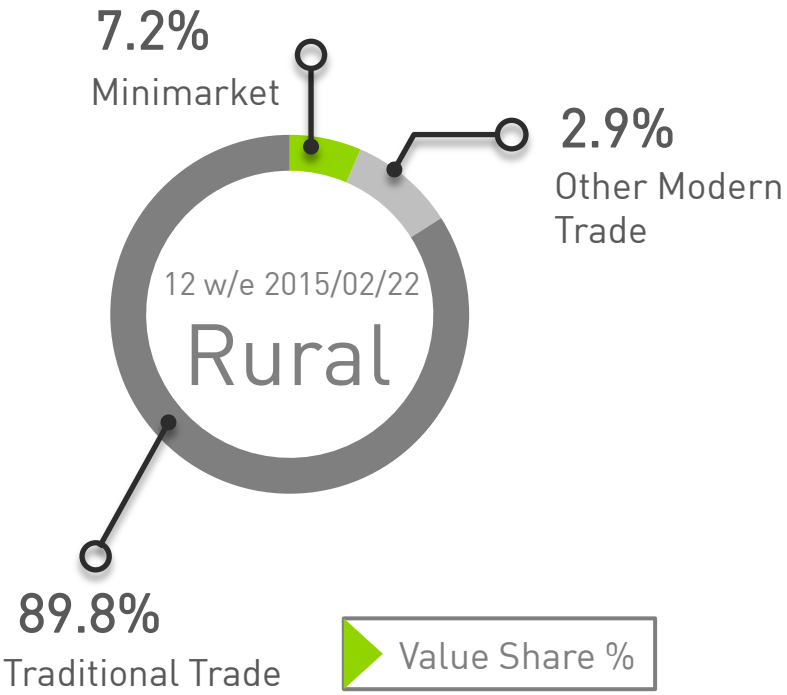
Value Change %	12 w/e 2015/02/22 vs. YA
Minimarket	+3%
Hypermarket	-9%
Supermarket	-7%
Traditional Trade	+9%

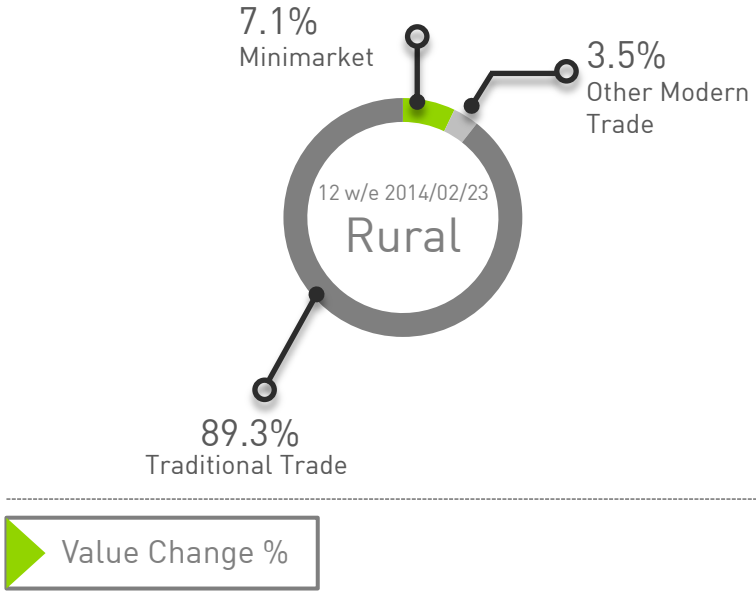
Source : *Kantar Worldpanel Indonesia – Household Panel – Total FMCG*

© Kantar Worldpanel

RETAILER

5 RETAILER SNAPSHOT - RURAL





Value Change %	12 w/e 2015/02/22 vs. YA
Minimarket	+10%
Traditional Trade	+9%

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

© Kantar Worldpanel

SPOTLIGHT OF INDONESIA

During the past year there are several FMCG categories, that are able to attract more buyers. Among those categories there are top 3 categories that grow the most. These categories are coconut milk, facial tissue, and frozen food.

Indonesia Urban, 52 weekly 2015/02/22 vs. 52 weekly 2014/02/23 Penetration change.

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

fanny.murhayati@kantarworldpanel.com
Dang.Reksawibisana@kantarworldpanel.com
www.kantarworldpanel.com/id

Kantar Worldpanel Indonesia @KWP_ID

© Kantar Worldpanel