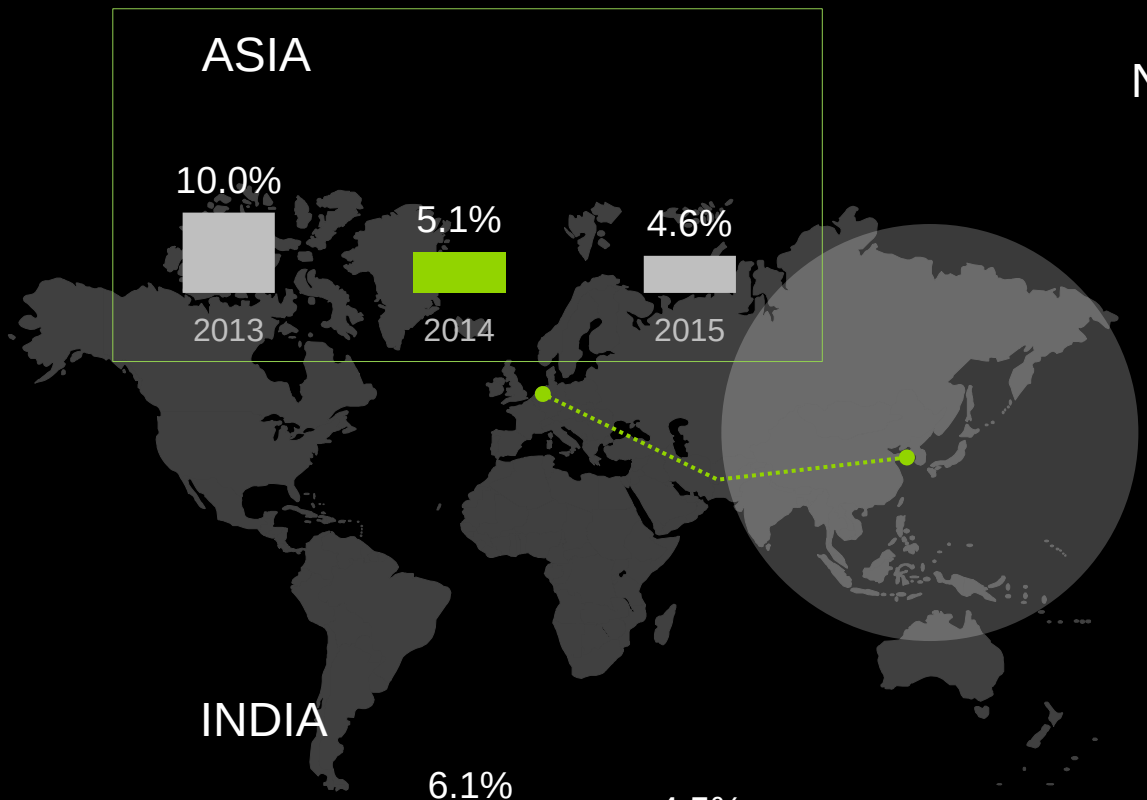


CONSUMER INSIGHTS
ASIA 2015

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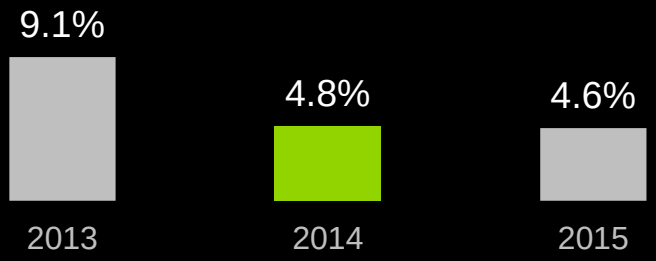
FMCG GROWS AT 4,6% - HALF THE GROWTH THAN TWO YEARS AGO

DECELERATION IN ALL SUB-REGIONS

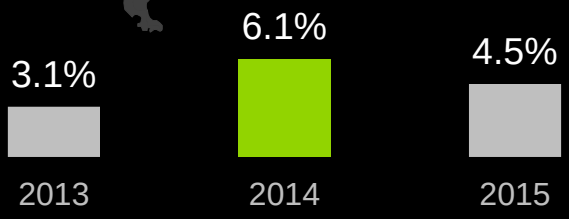


ASIA

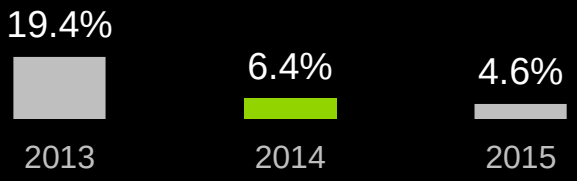
NORTH ASIA



INDIA



SEA



FMCG / MAT Q2 2015 & 2014 & 2013. North Asia: China, Taiwan. SEA: Urrban Vietnam, Indonesia, Thailand, Philippines, Malaysia

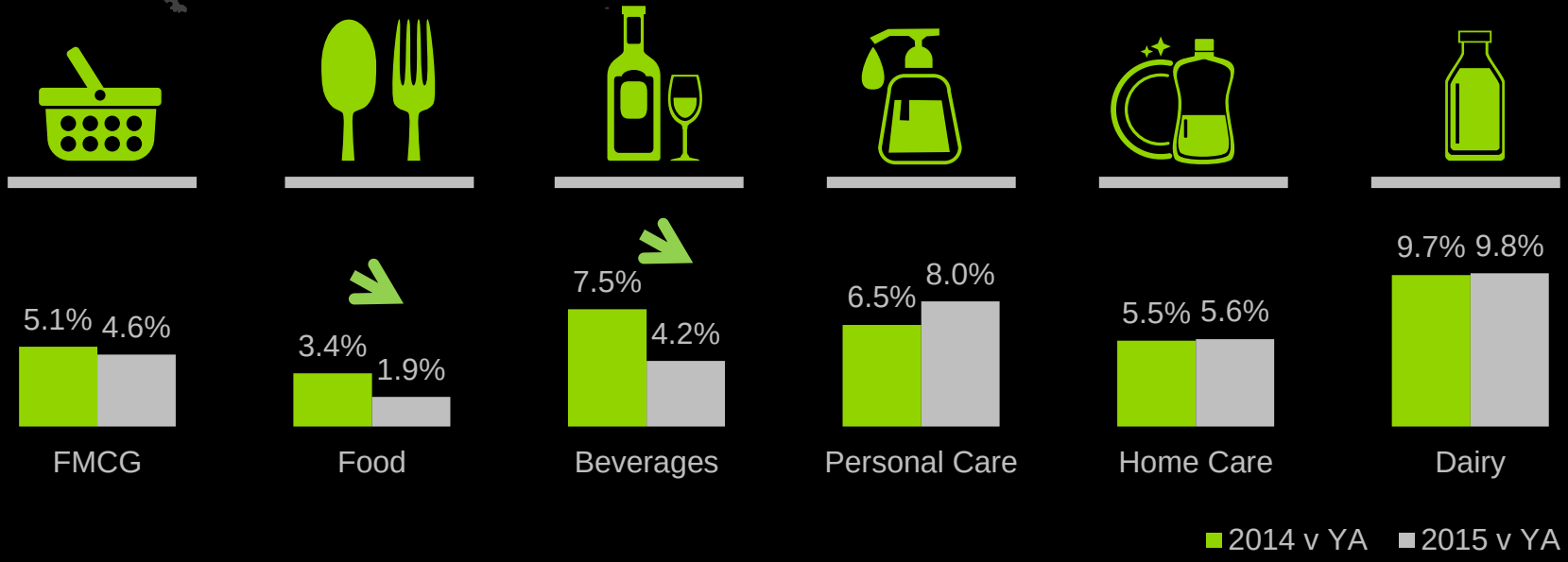
Details per country: click here

SLOWDOWN SEEN IN FOOD & BEVERAGES

THESE BASKETS ACCOUNT FOR 60% ASIAN HOUSEHOLDS´S FMCG SPEND



ASIA

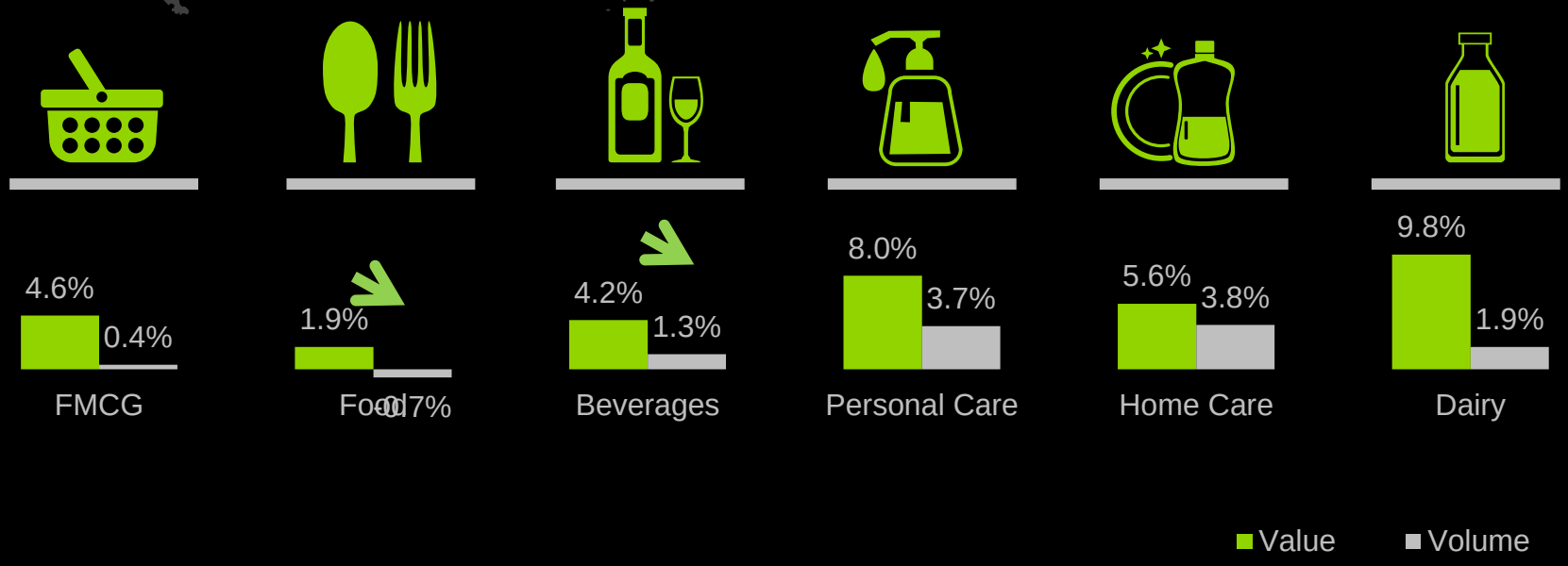


ASIA / MAT Q2 2015 & 2014

IN VOLUMEN, FMCG IS GROWING ONLY 0,4%
NON-FOOD GROWING THE FASTEST AT 3,8%

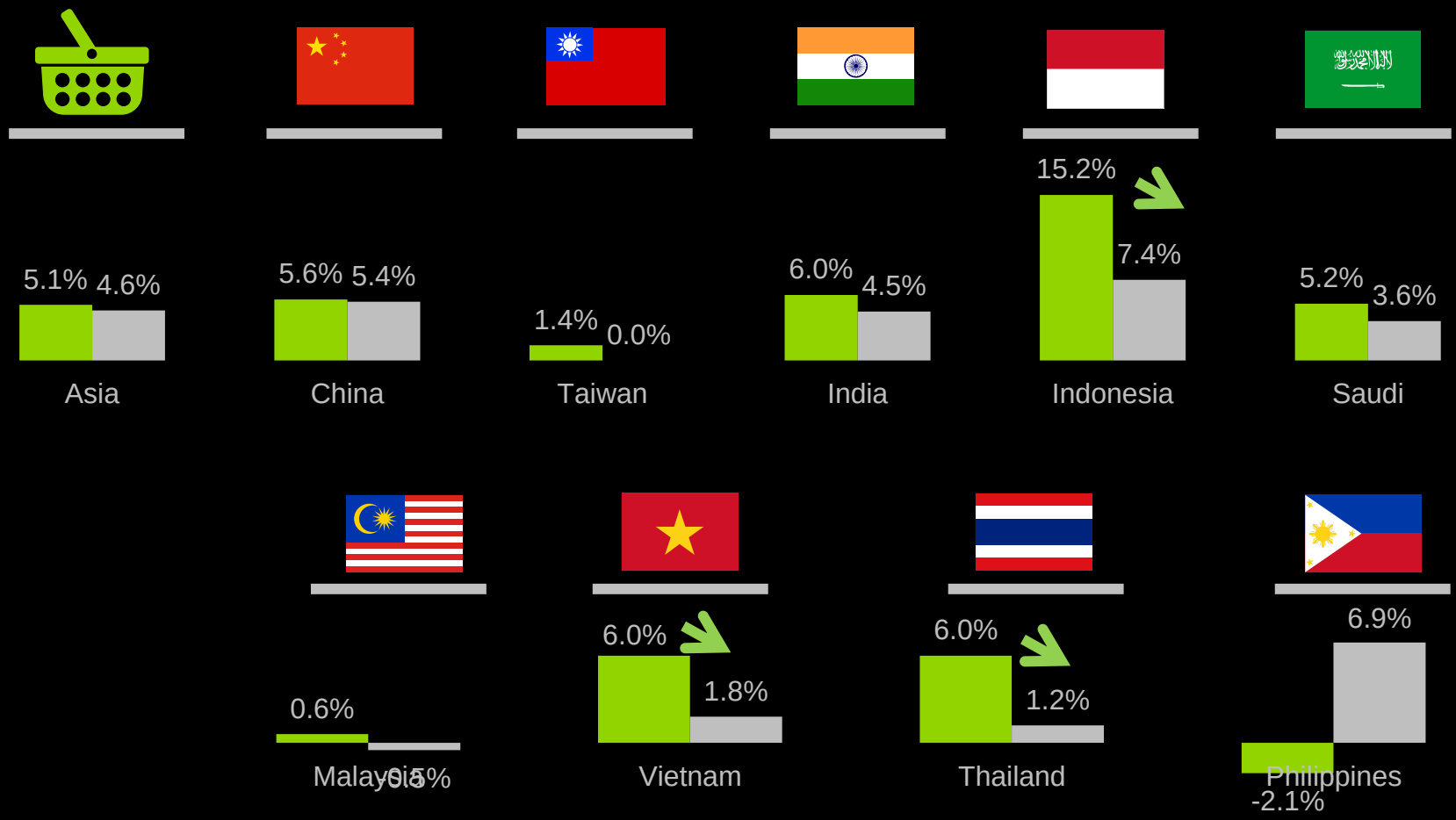


ASIA



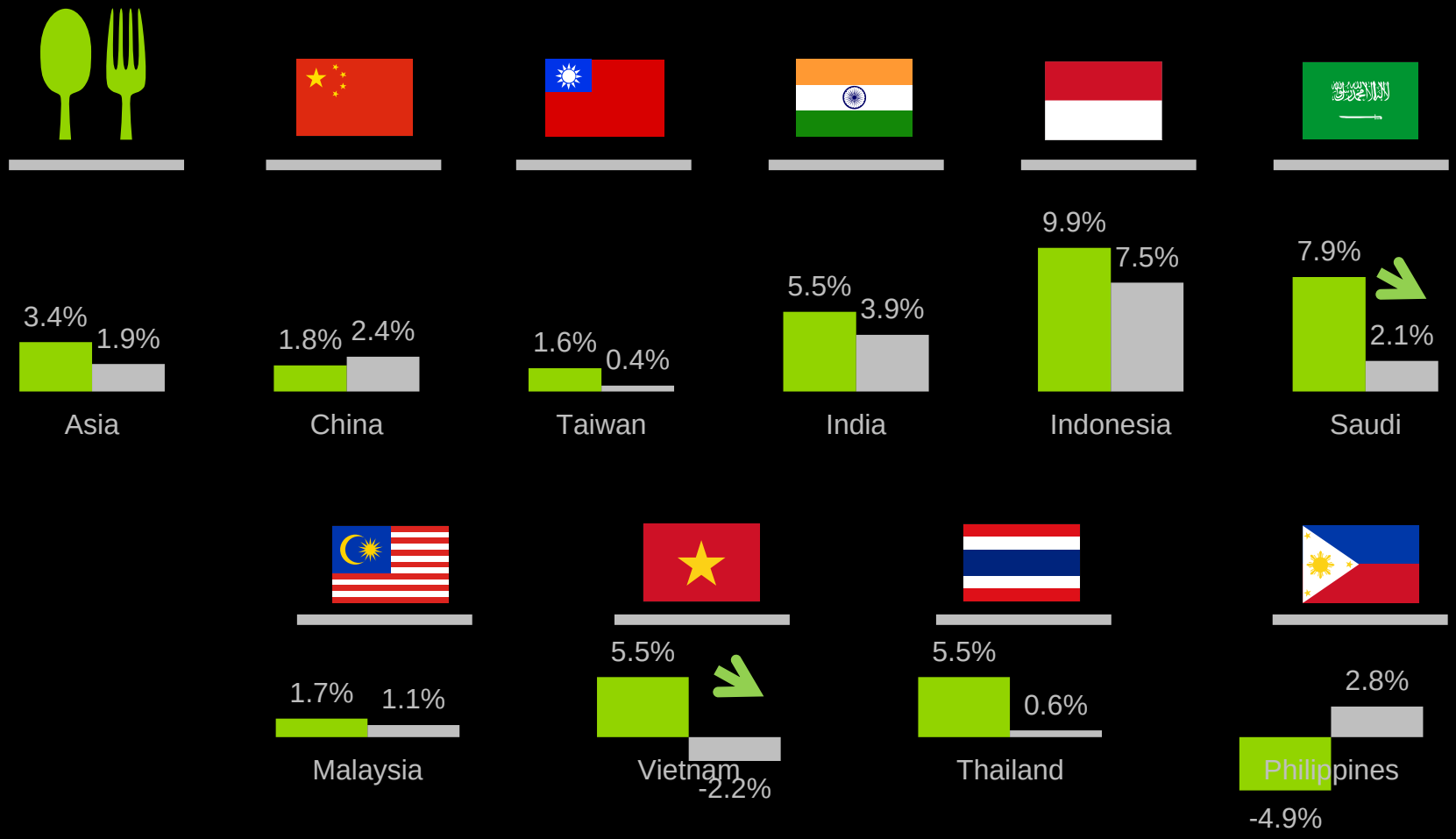
ASIA / MAT Q2 2015 & 2014 – Value and Volume growth

INDONESIA, THAILAND AND VIETNAM SLOWDOWN SHARPER



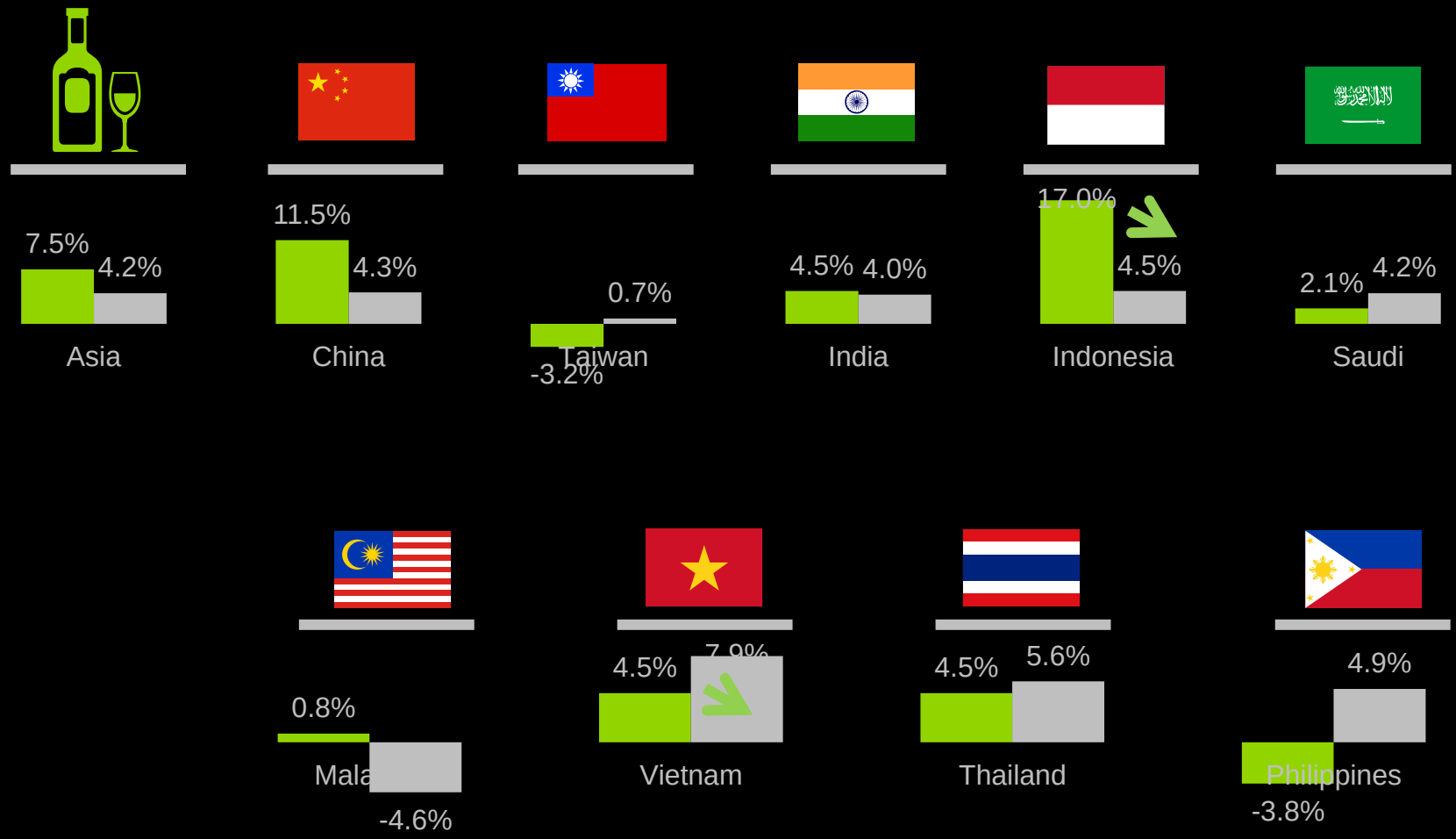
ASIA / MAT Q2 2015 & 2014 – Value Growth FMCG

FOOD: VIETNAM HOUSEHOLDS CONTRACT THEIR SPEND ON FOOD ITEMS



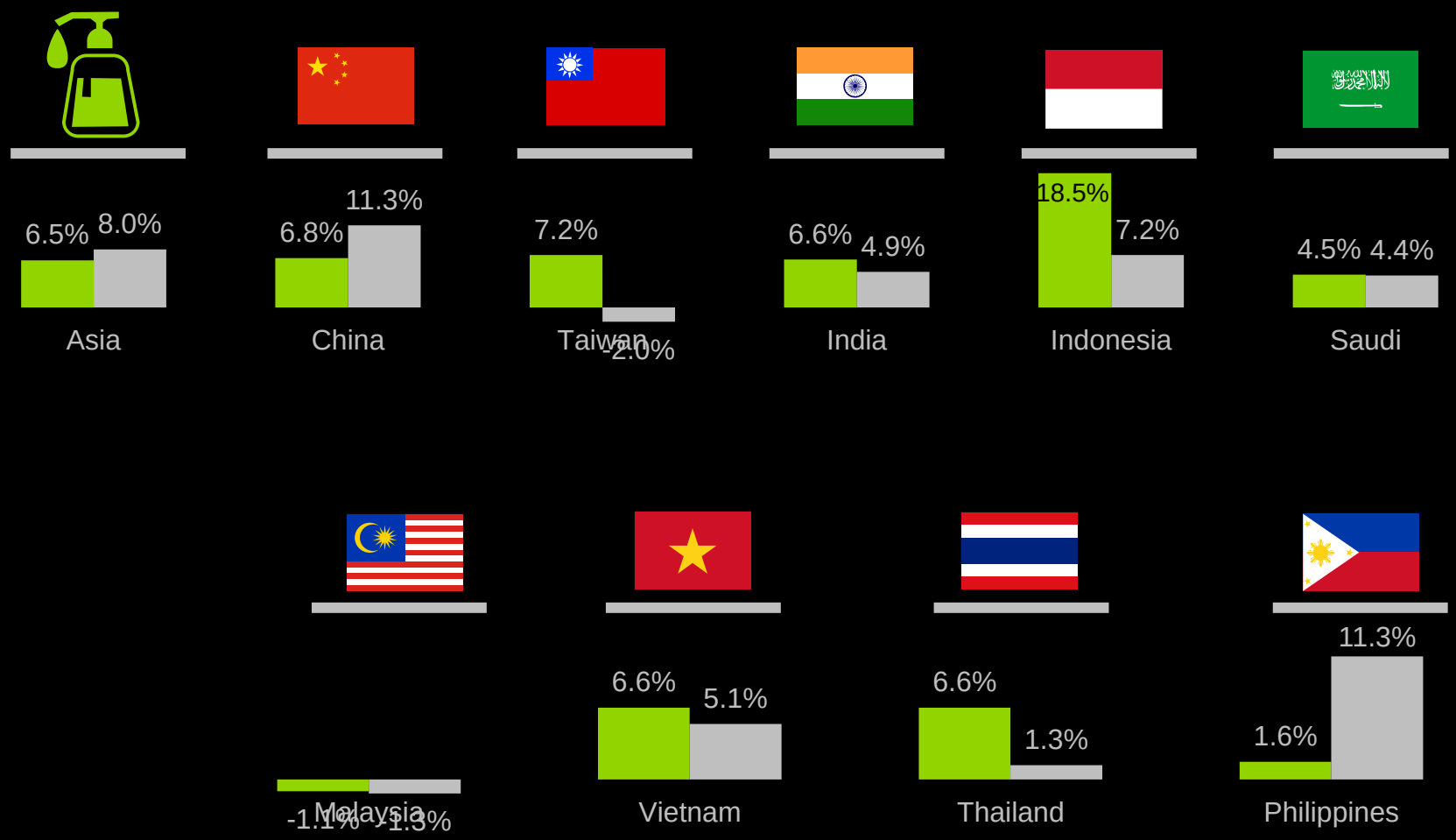
ASIA / MAT Q2 2015 & 2014 – Value Growth FOOD

BEVERAGES: WHILE INDO AND CHINA SLOWDOWN, MALAYSIA SHOWS NEGATIVE TREND



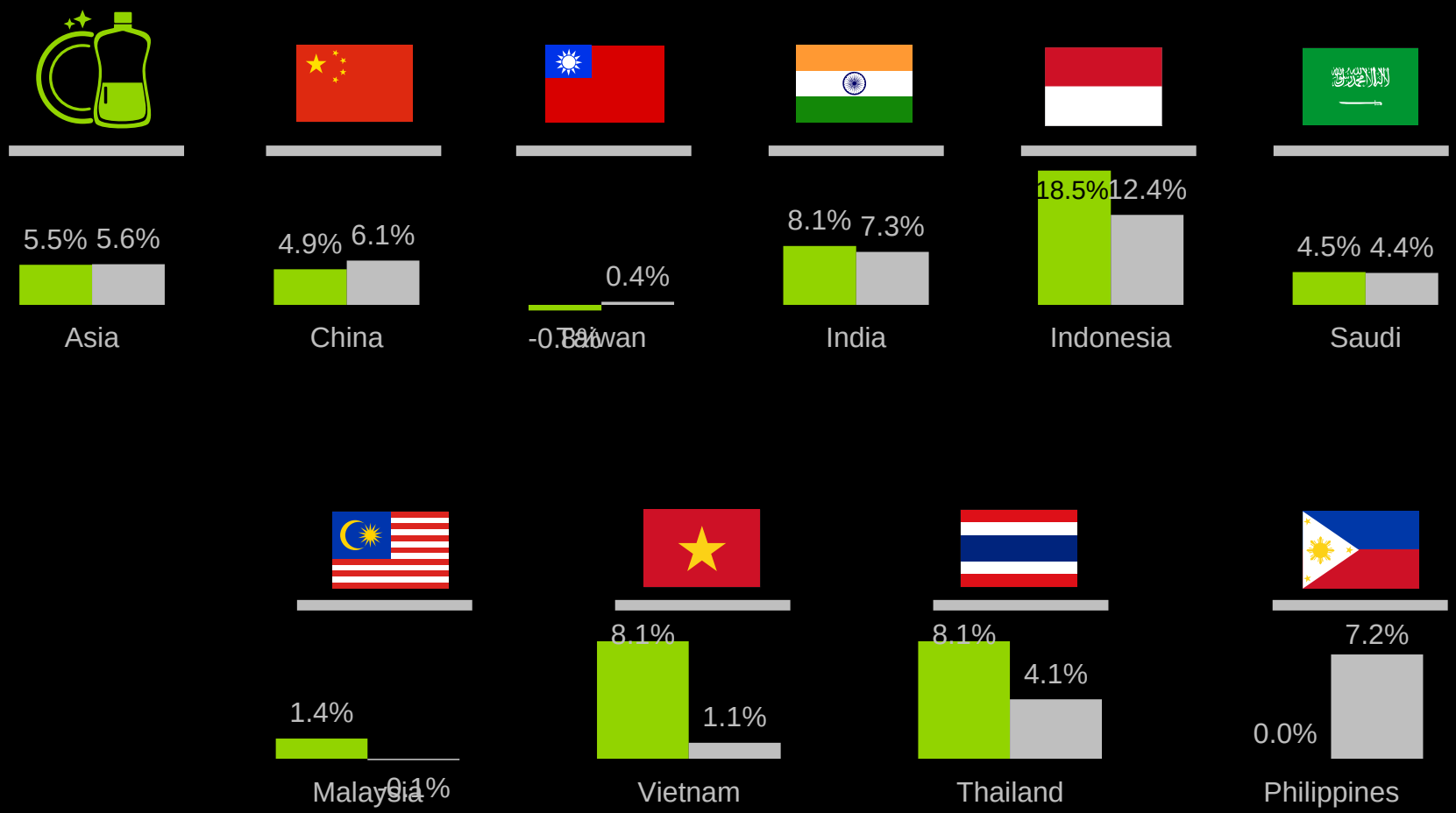
ASIA / MAT Q2 2015 & 2014 – Value Growth BEVERAGES

PERSONAL CARE: ONLY SECTOR THAT ACCELERATES GROWTH DRIVEN BY CHINA



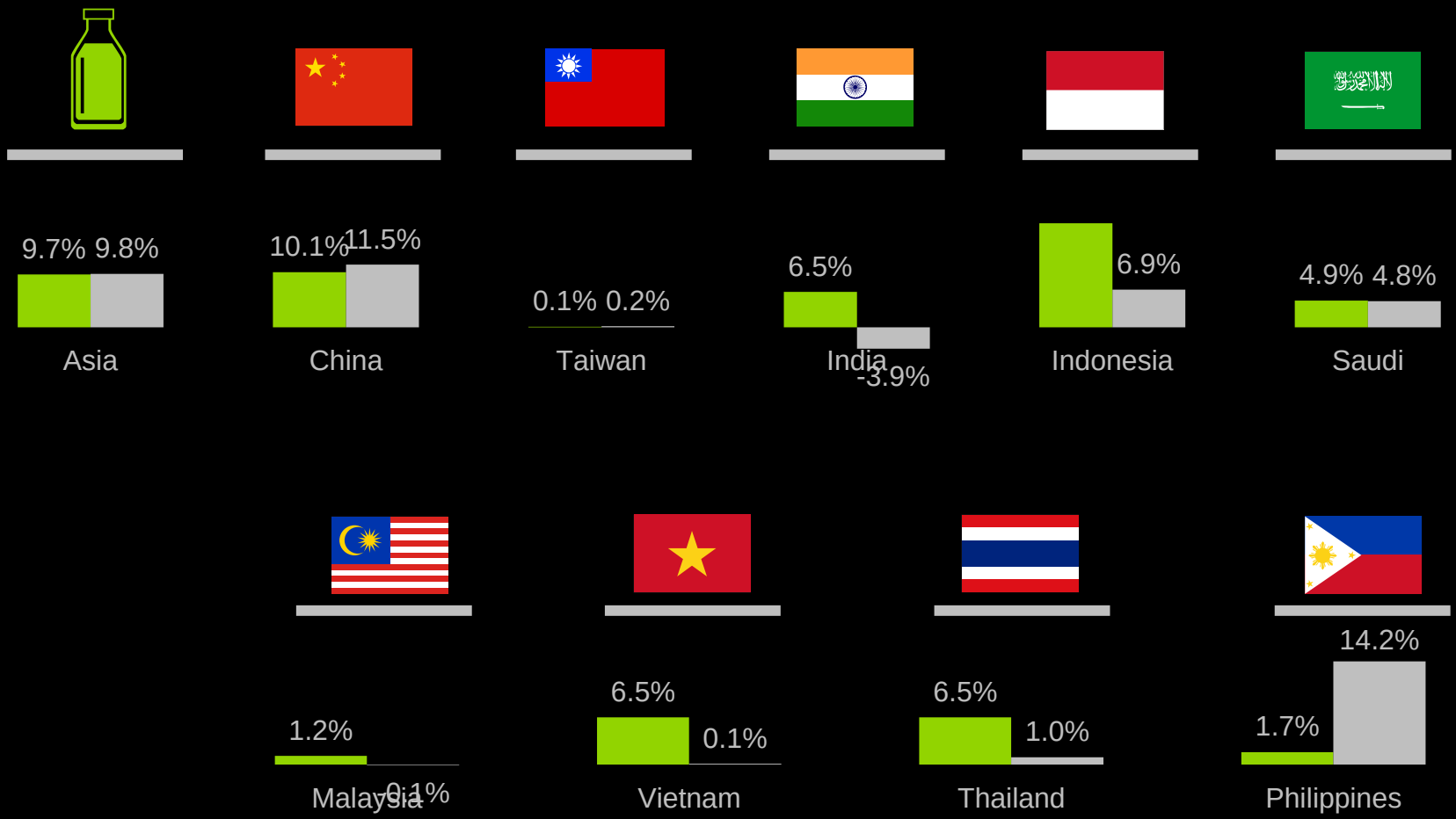
ASIA / MAT Q2 2015 & 2014 – Value Growth PERSONAL CARE

HOME CARE: DOUBLE DIGIT GROWTH IN INDONESIA



ASIA / MAT Q2 2015 & 2014 – Value Growth HOME CARE

DAIRY: DOUBLE DIGIT GROWTH IN CHINA AND PHILIPPINES. CONTRACTION IN INDIA AND MALAYSIA

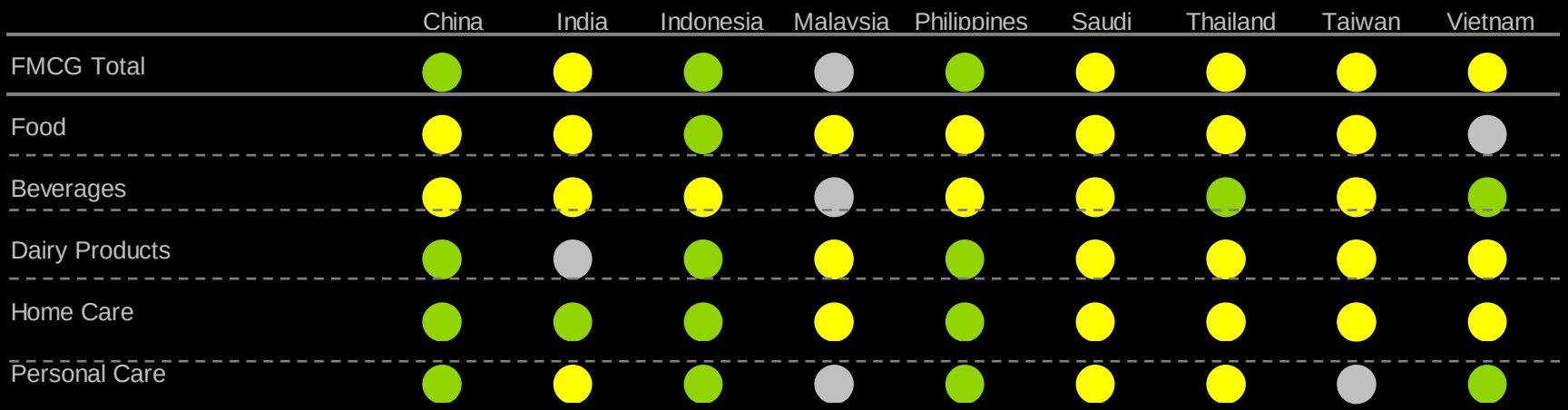


ASIA / MAT Q2 2015 & 2014 – Value Growth DAIRY

MAT Q2 2015 | SUMMARY ASIA

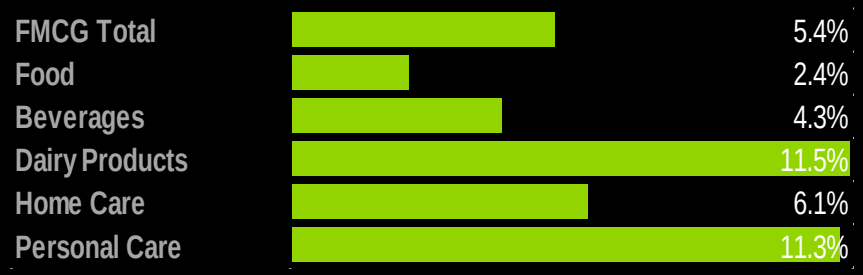
Back to the beginning

% Value Change FMCG – MAT Q2 2015 vs. Year ago

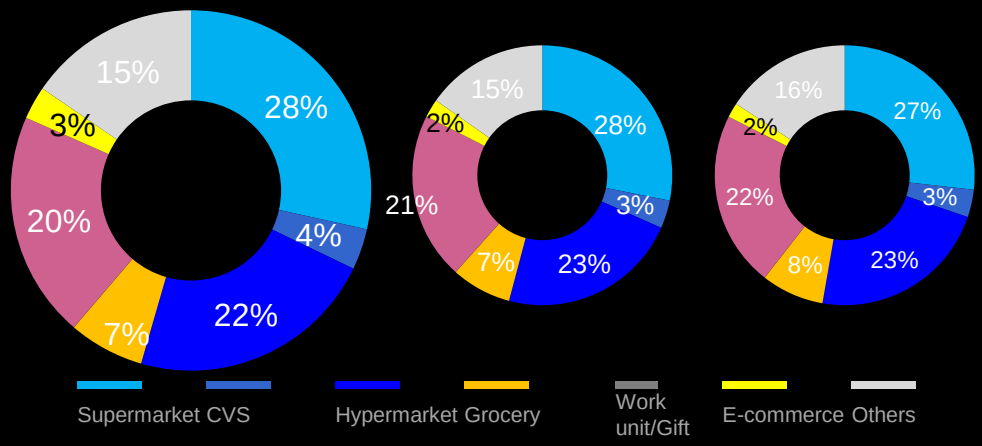


Details per country: click here

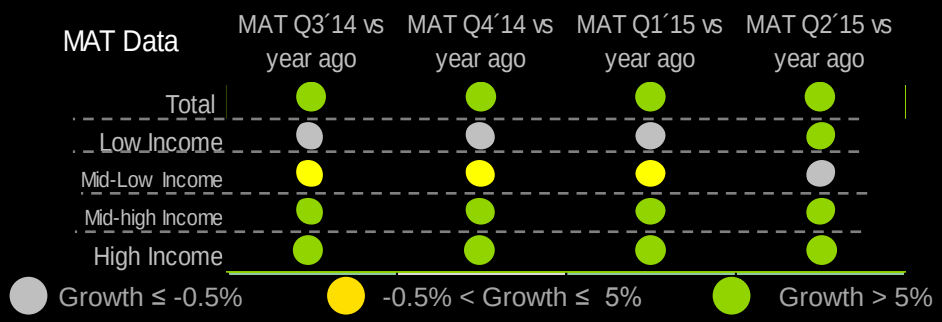
BASKET TRENDS – %Value Change MAT Q2.15 vs. YA



MAT Q2.15 / MAT Q2.14 / MAT Q2.13



%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

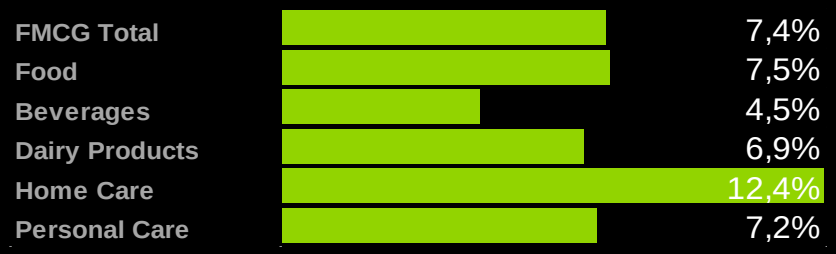


TOP 10 RECRUITERS IN CHINA (by penetration points growth)

Rank 2015	Categories	Additional Penetration points
1	FOREIGN SPIRIT	4.0
2	FUNCTION DRINK	3.1
3	CEREALS	2.2
4	COCO CONFECTIONARY	1.5
5	FABRIC SOFTENER	1.4
6	PERSONAL WASH	1.0
7	HAIR CARE	0.9
8	BUTTER	0.8
9	YOGURT	0.6
10	FROZEN FOOD	0.4

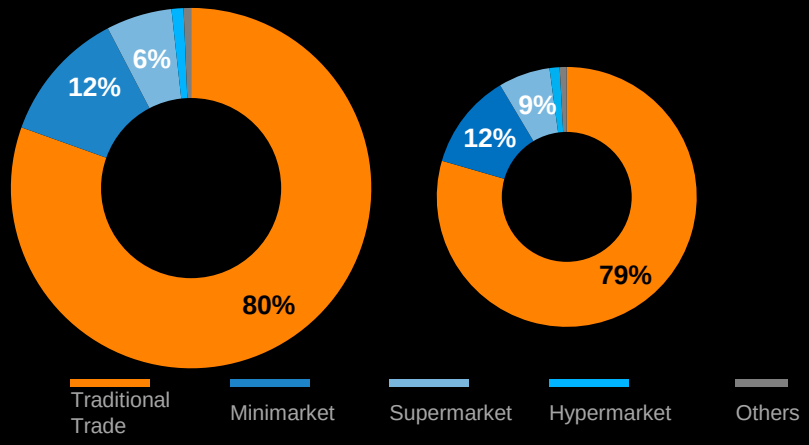
Source: MAT Q2'15 vs YA Category Penetration%

BASKET TRENDS – %Value Change MAT Q2.15 vs. YA

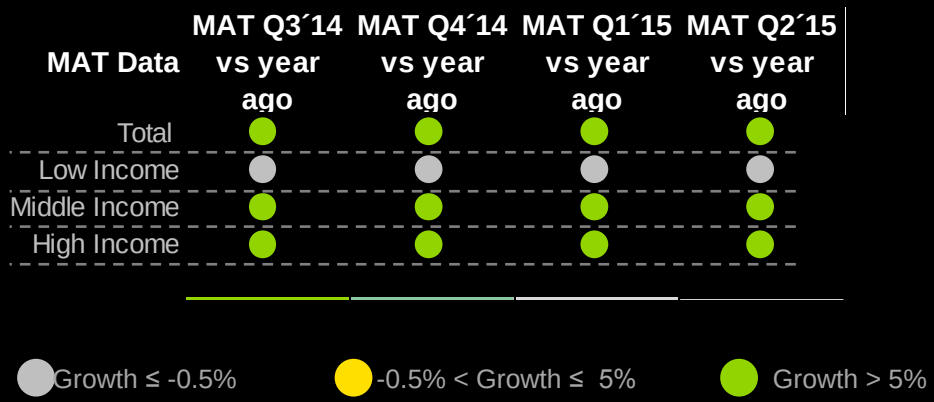


*Indonesia National Data

MAT Q2.15 / MAT Q2.14



%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL



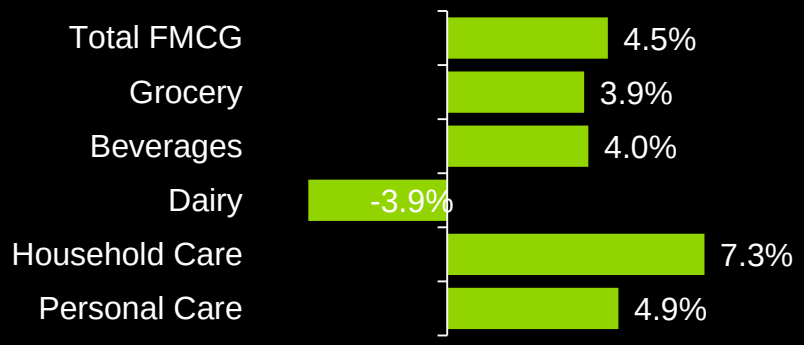
Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

TOP 10 RECRUITERS IN INDONESIA (by penetration points growth)

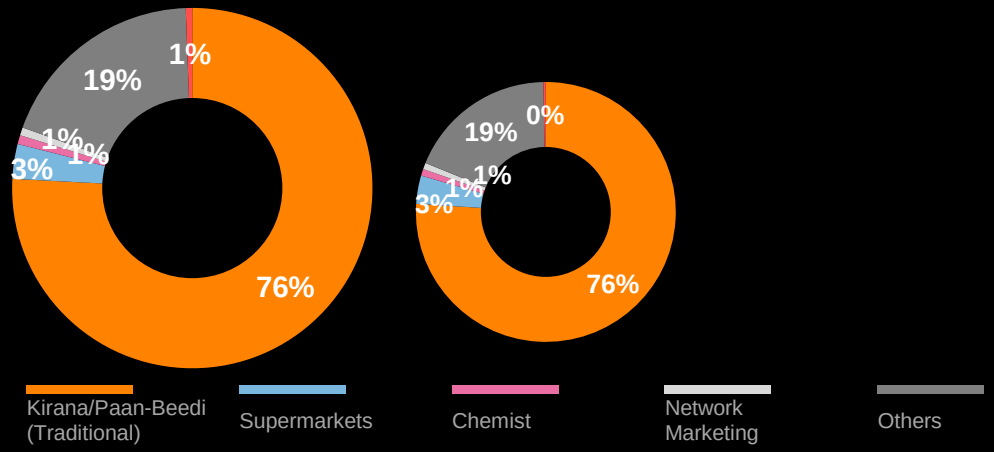
Rank 2014	Categories	Additional Penetration points
1	INSTANT TEA	2.5
2	SOY SAUCE	2.5
3	MSG	1.9
4	COCONUT MILK	1.8
5	ADULT MILK POWDER	1.2
6	FABRIC SOFTENER	0.9
7	INSTANT COFFEE	0.8
8	DISH WASH	0.3
9	INSECTISIDE	0.3
10	SEASONING & STOCK	0.3

Source: MAT Q2 15 vs YA Category Penetration%

BASKET TRENDS – %Value Change MAT Q2.15 vs. YA



MAT Q2.15 / MAT Q2.14



%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT Data	MAT Q3´14 vs year ago	MAT Q4´14 vs year ago	MAT Q1´15 vs year ago	MAT Q2´15 vs year ago
Total	●	●	●	●
Low Income	●	●	●	●
Middle Income	●	●	●	●
High Income	●	●	●	●

● Growth ≤ -0.5% ● -0.5% < Growth ≤ 5% ● Growth > 5%

TOP 10 RECRUITERS IN INDIA (by penetration points growth)

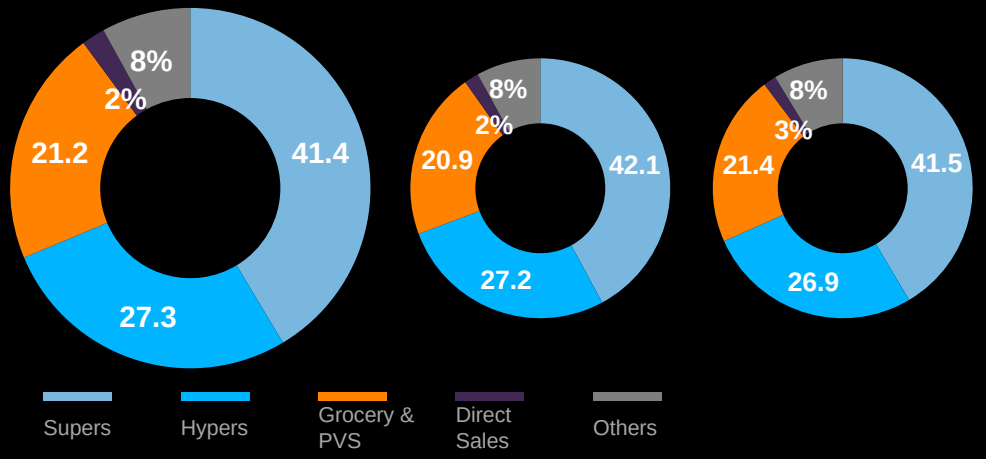
1	INSECTICIDES	1.4%
2	METAL SCOURERS	1.2%
3	SAUCE/KETCHUP	1.2%
4	FLOOR CLEANER	1.1%
5	TOILET/BATHROOMERS	0.5%
6	SHAMPOOS	0.3%
7	TOOTH PASTE/TOOTHPOWDER	0.2%
8	TEA	0.23%
9	DEPLATORIES/HAIRERS	0.17%
10	NOODLE/MACARONI	0.17%

Source: MAT Q1'15 vs YA Category Penetration%

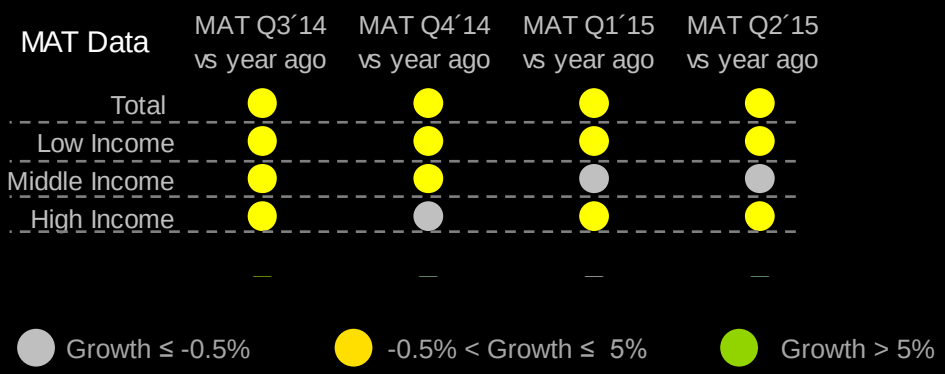
BASKET TRENDS – %Value Change MAT Q2.15 vs. YA



MAT Q2.15 / MAT Q2.14 / MAT Q2.13



%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

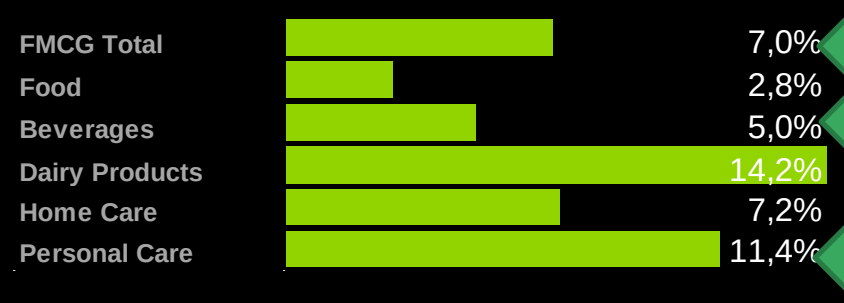


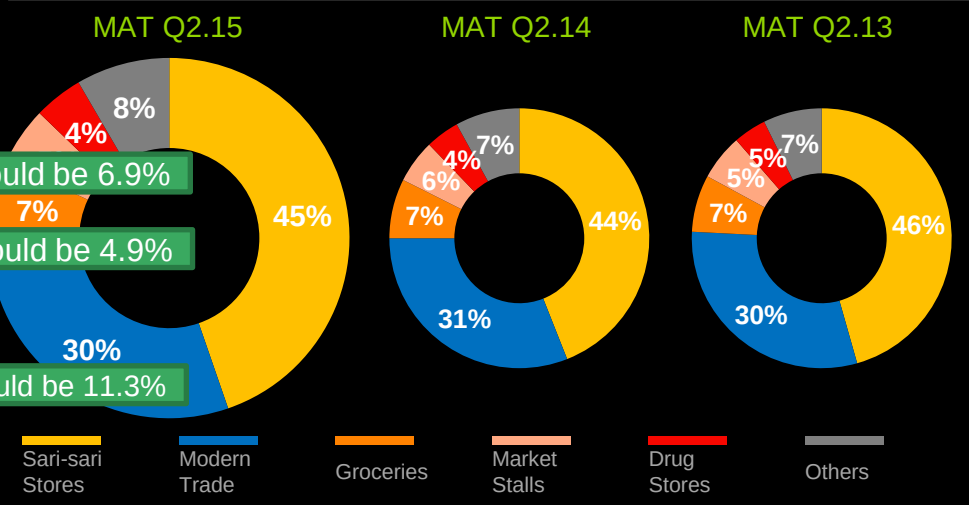
TOP 10 RECRUITERS IN MALAYSIA (by penetration points growth)

Rank 2014	Categories	Additional Penetration points
1	SEASONING POWDER	3.9
2	COCONUT MILK	2.8
3	MSG	2.2
4	MULTI PURPOSE	2
5	ISOTONIC DRINKS	1.7
6	SALAD DRESSING	1.7
7	RTD TEA	1.5
8	SPAGETTI	1.5
9	RTD COFFEE	1.4
10	HONEY	1.2

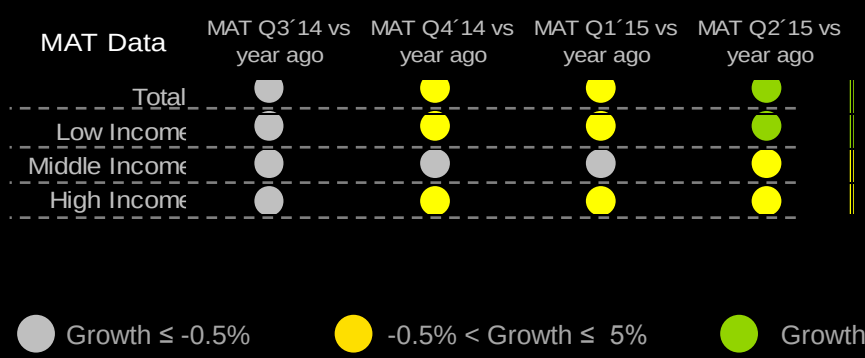
Source: MAT Q215 vs YA Category Penetration%

BASKET TRENDS – %Value Change MAT Q2.15 vs. YA





%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

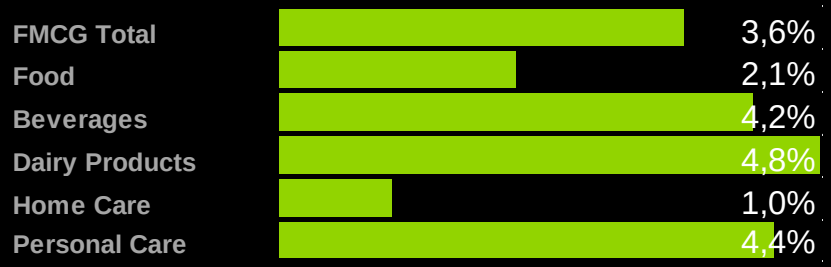


TOP 10 RECRUITERS IN PHILIPPINES (by penetration points growth)

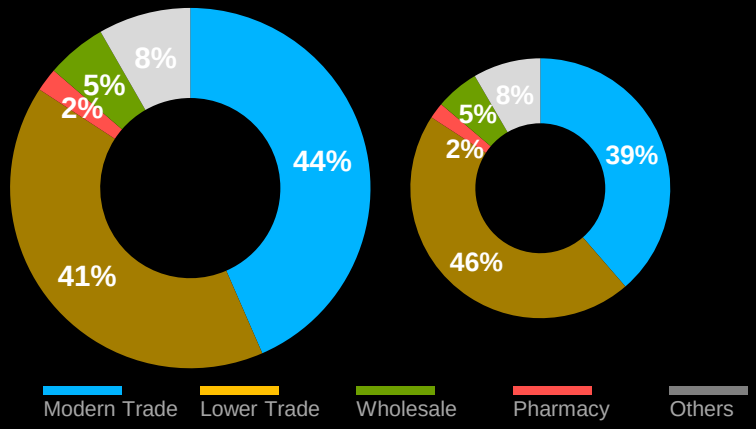
Rank 2015	Categories	Additional Penetration points
1	Water	6,0
2	Liquid Juice	5,4
3	Condensed Milk	5,3
4	Uncooked Pasta	5,3
5	Wafer	5,0
6	Sandwich/Liver Spread	4,7
7	Coated Biscuits	4,3
8	Marie	4,0
9	Fabric Softener	3,9
10	Infant Milk/Formula Milk	3,7

Source: MAT Q2 15 vs YA Category Penetration%

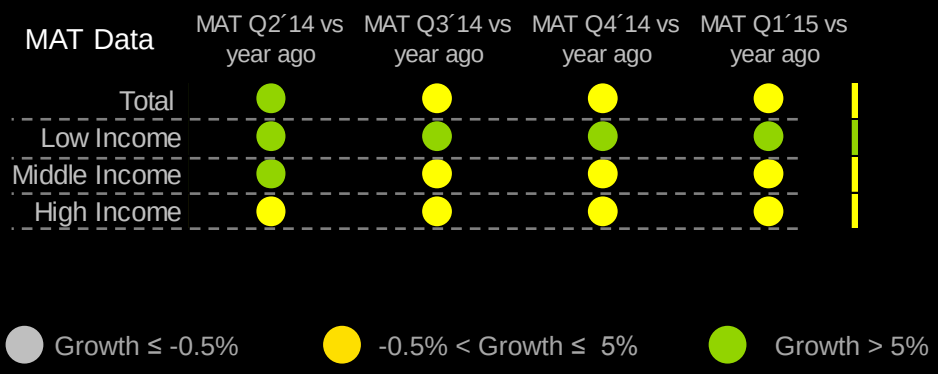
BASKET TRENDS – %Value Change MAT Q2.15 vs. YA



MAT Q2.15 / MAT Q2.14



%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

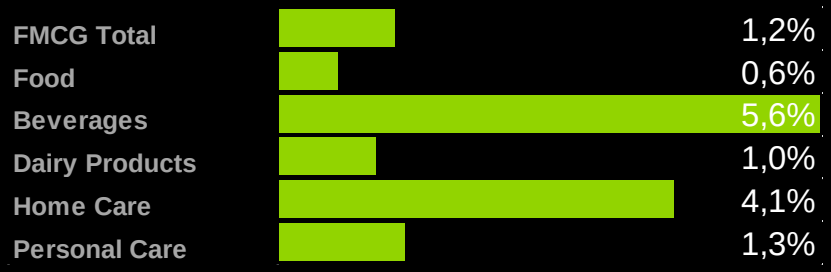


TOP RECRUITERS IN KSA (by penetration points growth)

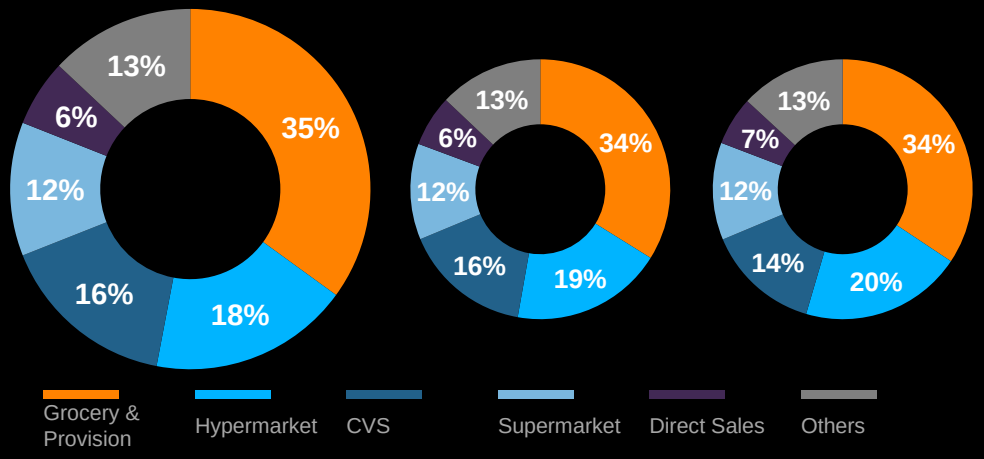
Rank 2015	Categories	Additional Penetration points
1	EVAPORATED MILK	5,2
2	CONDENSED MILK	4,4
3	SANITARY NAPKINS	3,9
4	LABNEH	3,3
5	CHEESE	3,2
6	FRESH MILK	3,1
7	COFFEE	2,9
8	BREAKFAST CEREALS	2,5
9	SPREADS	2,5
10	BOTTLED WATER	1,9

Source: MAT Q215 vs YA Category Penetration%

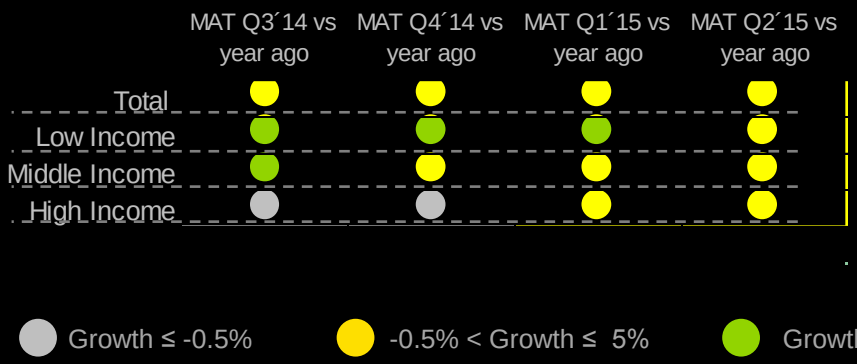
BASKET TRENDS – %Value Change MAT Q2.15 vs. YA



MAT Q2.15 / MAT Q2.14 / MAT Q2.13



%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL



Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

TOP 10 RECRUITERS IN THAILAND (by penetration points growth)

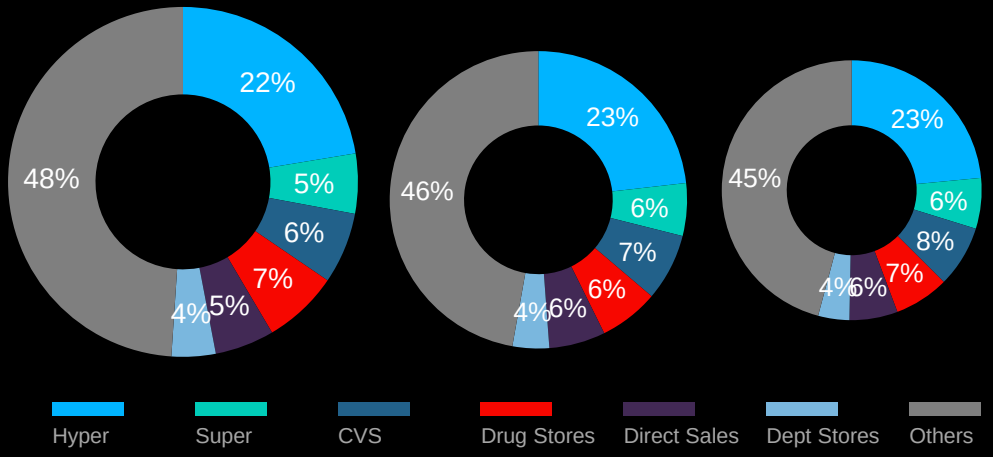
Rank 2015	Categories	Additional Penetration points
1	Facial Tissue	6,3
2	Bottle Water	4,4
3	Energy Drink	4,1
4	Sun Protection	2,4
5	Rice	1,6
6	Toothbrush	1
7	Pet food	0,8
8	Canned Fish	0,41
9	Toothpaste	0,36
10	Tot Feminine Protect	-0,06

Source: MAT Q2 15 vs YA Category Penetration%

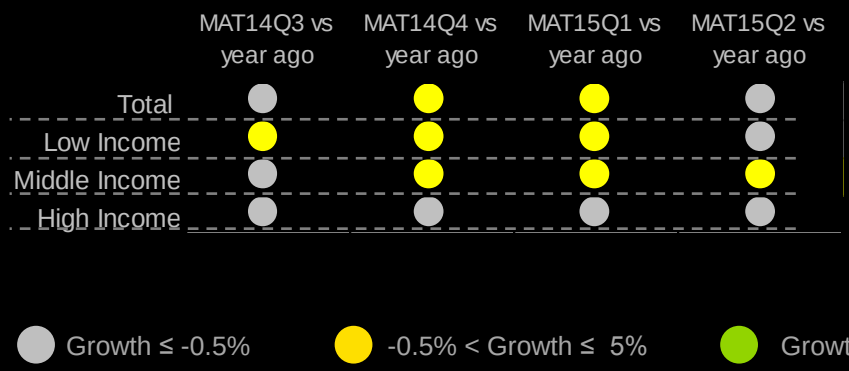
BASKET TRENDS – %Value Change MAT Q2.15 vs. YA

FMCG Total	0,0%
Food	0,4%
Beverages	0,7%
Dairy Products	0,2%
Home Care	0,4%
Personal Care	-2,0%

MAT Q2.15 / MAT Q2.14 / MAT Q2.13



%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

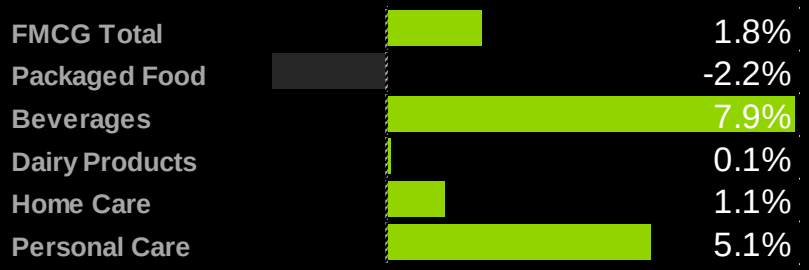


TOP 10 FMCG RECRUITERS IN TAIWAN (by penetration point growth)

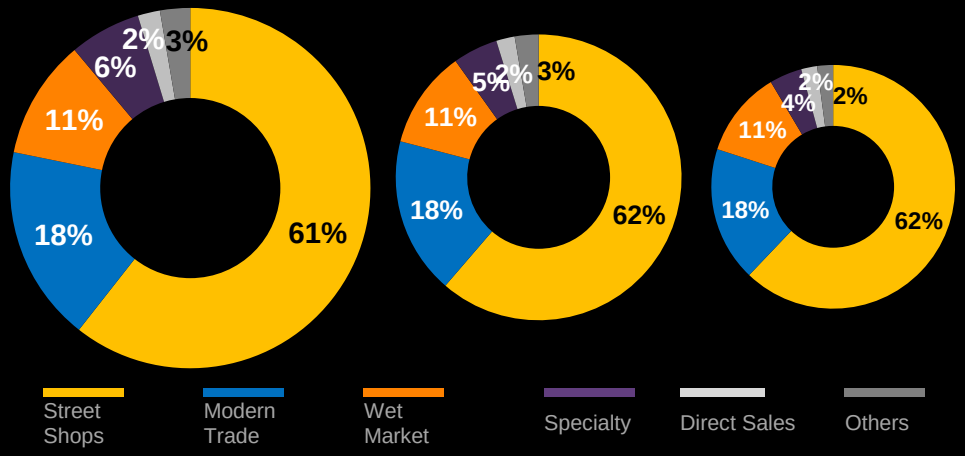
Rank 2015	Categories	Additional Penetration points
1	Energy / Sports Drink	5.5
2	Wet Tissue	2.6
3	Cheese	1.8
4	Deodorants	1.6
5	Butter	1.5
6	Pasta	1.5
7	Packaged Water	1.3
8	Instant Vinegar	1.2
9	Sun Protection	1.0
10	Spirits	0.9

Source: MAT Q2 15 vs YA Category Penetration%

BASKET TRENDS – %Value Change MAT Q2.15 vs. YA URBAN 4 CITIES

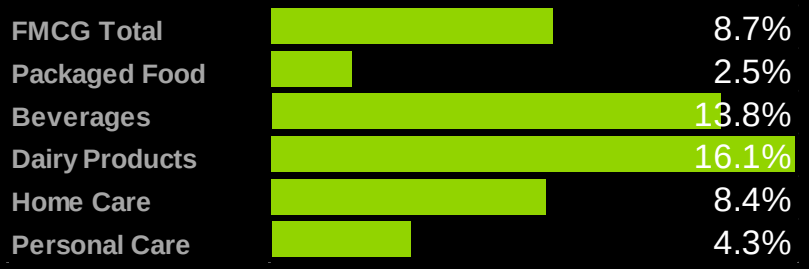


MAT Q2.15 / MAT Q2.14 / MAT Q2.13



Note: Data Urban 4 cities

BASKET TRENDS – %Value Change MAT Q2.15 vs. YA RURAL



Note: Data excluding gift

TOP 10 RECRUITERS IN VIETNAM (by penetration points growth)

Rank 2015	Categories	Additional Penetration points
1	Oyster sauce	5%
2	Soya Milk	3%
3	Energy Drink	3%
4	CSD	3%
5	Drinking Yogurt	2%
6	Drinking Water	2%
7	Tonic Food Drink	2%
8	Cup Yougurt	2%
9	Sun Protection	1%
10	Canned Fish	1%

Source: Urban Vietnam / MAT Q215 vs YA Category Pen%



CONSUMER INSIGHTS
ASIA 2015

Contact: Virginia.garavaglia@kantarworldpanel.com

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