

# LIVING IN C-19 TIMES

FMCG: ASIAN CONSUMER / SHOPPER  
REACTION DURING LOCKDOWN

Worldpanel Weekly Data April 2020



INCLUSIVE OF OUR **LOCAL EXPERTS**  
**POINT OF VIEW** ON HOW THE FMCG  
MARKET WILL FAIR IN THE COMING  
3 MONTHS

KANTAR,  
WORLD PANEL  
DIVISION ASIA

**KANTAR**



## FOREWORD

Undoubtedly, COVID-19 has changed the way shoppers and consumers behave in the FMCG market.

At Worldpanel Division of Kantar, we believe these changes will continue in the foreseeable future as shoppers/consumers adapt and adjust to the new market reality.

Within the past few weeks, we have seen movement policies enacted across the Asia Pacific region at different speed and pace. Each market taking a different stance and approach be it in the level of flexibility, and/or length of control. In addition, we are also experiencing an evident rise in the unemployment rates, and a dynamic change in how people consume and shop. This publication examines the changes in how shoppers/consumers behaved post lockdown. More importantly, how the following impacted the overall FMCG spend in each market across Asia. In addition, we will also be examining the impact of Out-of-Home expenditure vis-à-vis In Home, and what changes/shifts we are observing:

- **Mobility**
- **Accessibility to shop**  
(E-commerce/ O2O vs. Brick and mortar stores)
- **Spending power**  
(driven by the contribution of the social economy classes; and the potential impact of festivities and unemployment rate)

Manufacturers and retailers will need to adapt to themselves to these changes. The two most commonly asked questions we get center around:

- **What learnings can I take from markets in recovery?**
- **What changes do I need to make today to ensure that I continue to stay ahead?**

Whilst it is important to learn from markets in recovery, we equally need to have a realistic lens on what and where we are learning from.

In essence, we cannot average Asia.

Find out more in our latest publication – Living in the COVID-19 times!

# LIVING IN C-19 TIMES

## FMCG: ASIAN CONSUMER / SHOPPER REACTION DURING LOCKDOWN

Worldpanel Weekly Data April 2020

## WHAT'S INSIDE

01

### IN-HOME PURCHASING BEHAVIOR DURING LOCKDOWN

- How similar / different are the purchase behavior across markets?
- Plus and exclusive one on one inputs from our local experts on what to expect in market in the coming 3 months

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### RELEVANCE OF OUT OF HOME DURING THE LOCKDOWN

How is it impacted?

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## SPECIAL REPORT: WHAT HAVE WE KNOWN SO FAR



1st Publication: Myths Debunked in S.E.A



2nd Publication:  
Embracing Stay At Home Economy in S.E.A



3rd publication: living in c-19 times | FMCG:  
Asian Consumer / Shopper Reaction During  
Lockdown

DATA ENDING  
FEB 20

DATA ENDING  
MAR 20

DATA ENDING  
APR 20

### PANIC-BUYING IN KEY CITIES IN S.E.A

Panic buying is observed in selected region/cities where the we saw the earliest cases emerge/ neighbouring, such as South Malaysia (border with Singapore which has confirmed positive cases earlier vs other SEA countries); Central Java, GBKK as well as Hanoi/ HCMC.

### STAY-AT-HOME ECONOMY IN S.E.A

The growth of FMCG extends nation wide as the number of confirmed cases soar. Panic buying/stocking up brings a different meaning across Income/ SES/SEC classes by categories which signals the need for manufactures have to review & calibrate their pack and price strategy.

### NEW: LIVING IN COVID-19 TIMES

Scope of our coverage now includes North Asia (China, S Korea and Taiwan). Assessing 6 factors on how that affect how Shoppers/ consumers buy and consume. More importantly what else can we learn from this?

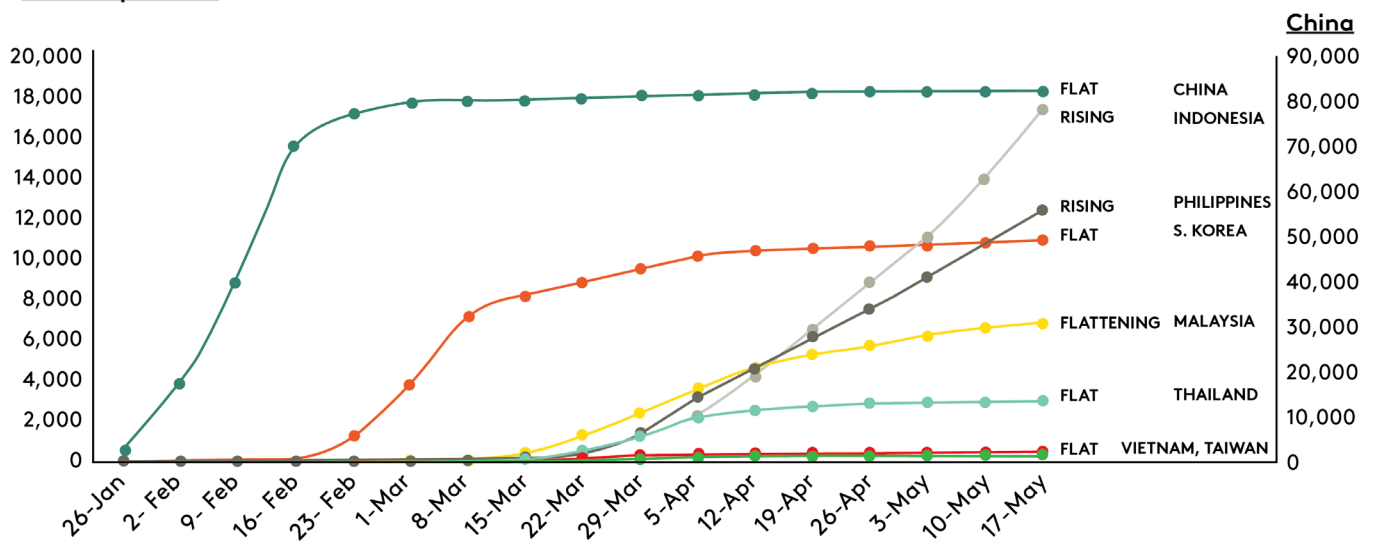
In addition, a lens on Out of Home (OOH) How are consumers / shoppers shifting their spend between In & OOH in light of current situation.



## SETTING THE SCENE: HOW ARE WE FARING TODAY?

China and S Korea's new cases have plateaued; countries in SEA i.e. Indonesia and Philippines continues to battle the impact of Covid 19 whereas Thailand, Vietnam and Taiwan have begun to embrace their new 'normal'.

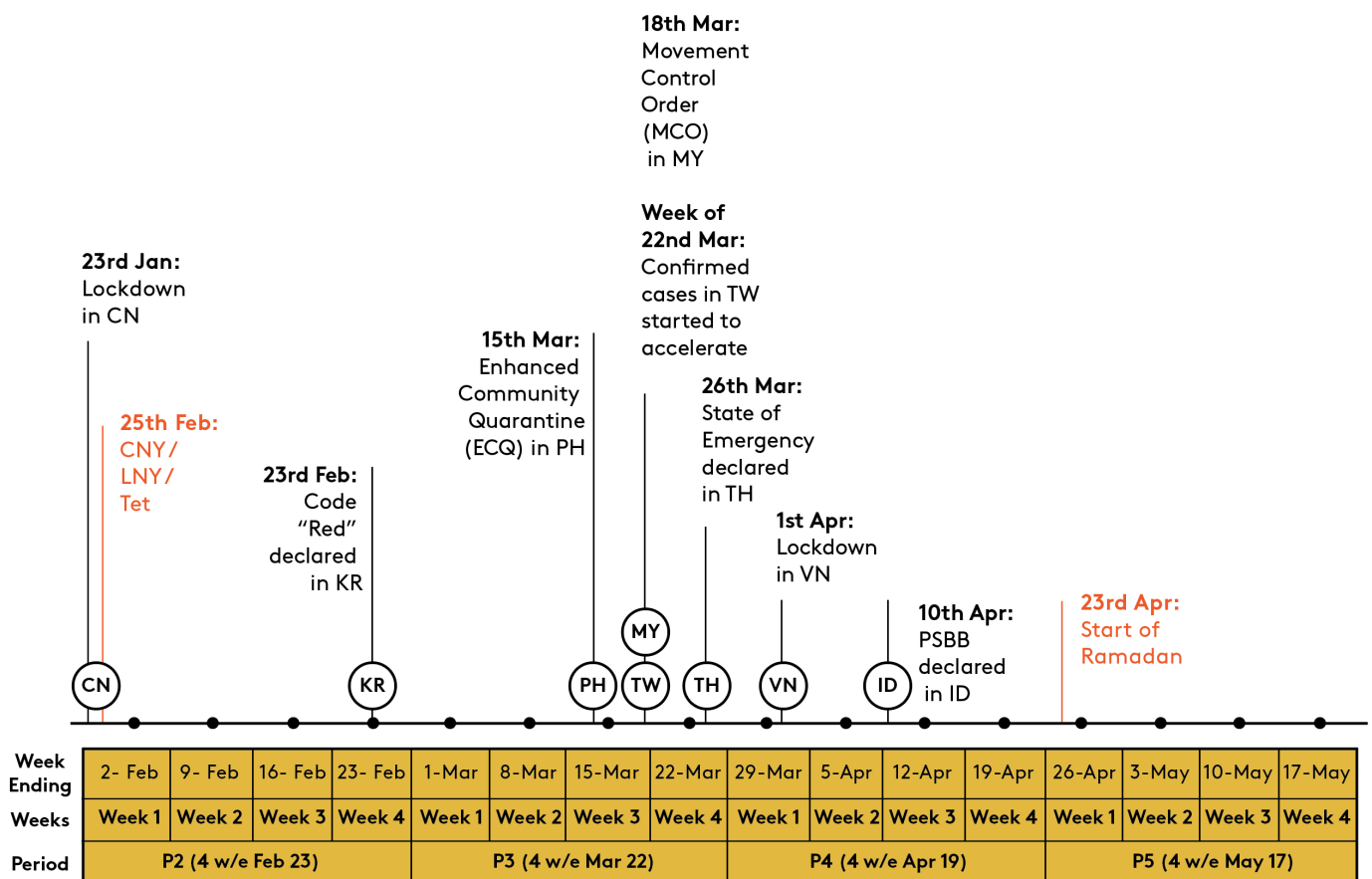
**Weekly Cumulative Confirmed COVID-19 Cases in Asia**  
**ALL except China**





## SETTING THE SCENE: THE LOCKDOWN (‘DIRECT/INDIRECT’) IN PLACE VARIES FROM ONE MARKET TO ANOTHER

For the purposes of this report, we have **normalized each markets by its week of Lockdown (LD)**. In the subsequent slides ‘LD-3 refers to 3 weeks prior to LD’; ‘LD+3 refers to 3 weeks after LD’.

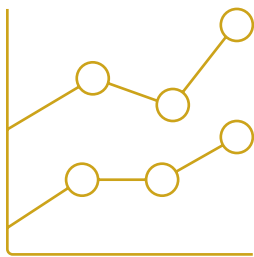




## 6 FACTORS THAT BROADLY IMPACTS HOW FMCG PERFORMS BY MARKET

And these factors have (and will continue to) influenced how consumers / shoppers shop.

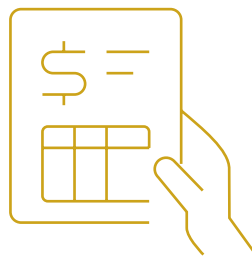
### MOBILITY



#### 1. Length of Lockdown (LD)

The longer the lockdown/ restricted movement, we see a more significant impact on FMCG expenditure.

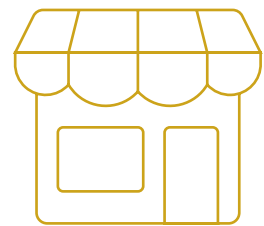
### SPENDING POWER



#### 3. HH Income/ SEC Contribution

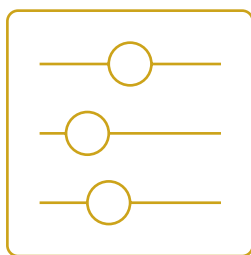
Lower Income/ SEC households who generally tend to live on daily or weekly wages are more impacted – having to choose between essential vs non essentials.

### AVAILABILITY



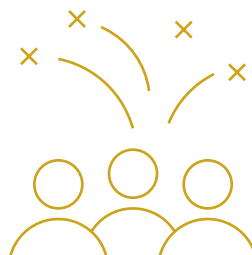
#### 5. Ease of access to Proximity Store

The availability/access of 'proximity' channels and the ranges stocked plays an equally important role. With less time spend in store.



#### 2. Restriction level of LD (Flexible/Strict)

The level of Flexible imposed equally impacts the frequency and number of categories/ quantity and spend of consumers and shoppers.



#### 4. Festivities/ Seasonality

Major festivities such as Lunar New Year/TET/, Ramadan & Eid impacts not only the shopper purchase cycle but also the categories they buy.



#### 6. E-commerce / O2O Development

How developed/ Ready EC and O2O (Offline stores in delivering to consumers at home with online platform) is also critical to the overall FMCG spend.



# BROAD SPECTRUM OF ASIA CONSUMER

## 1. WE CANNOT AVERAGE ASIA

A quick reminder on the Shopping pattern, Spending power, Demographic and Channel development across Asia.

FMCG excl. Fresh Annual 2019	Indonesia	Thailand	Pen. Malaysia	Vietnam Urban	Vietnam Rural	Philippines
Average Spend per Household	USD 442	USD 635	USD 652	USD 697	USD 415	USD 694 <small>Spend on Food is 4x higher vs. Indo</small>
Average Transaction	301 x	183 x	96 x	145 x	131 x	374 x
SES/Income Level Contribution	DE : C : AB 26 : 42 : 32	Low : Mid : High 15 : 40 : 45	Low : Mid : High 27 : 33 : 40	Low : Mid : High 12 : 59 : 29	Low : Mid : High 16 : 57 : 27	DE : C : AB 84 : 15 : 1
Trade Contribution MT:GT	30 : 70	47 : 53	79 : 21	23 : 77	4 : 96	44 : 56
Urbanization HH% Urban:Rural	53 : 47	51 : 49	77 : 23	-	-	53 : 47
Household Population	68 Mio	26 Mio	5.9 Mio	3.0 Mio	17.2 Mio	24.6 Mio
% HH Size With 4+ Members	67	36	62	66	50	69

FMCG excl. Fresh Annual 2019	National Urban China	Taiwan	Korea
Average Spend per Household	USD 1,098	USD 1,401	USD 1,514
Average Transaction	81 x	97 x	134 x
SES/Income Level Contribution	Low : Mid : High 30 : 39 : 31	Low : Mid : High 12 : 40 : 48	Low : Mid : High 11 : 61 : 28
Trade Contribution MT:GT	89 : 11	99 : 1	97 : 3
Urbanization HH% Urban:Rural	33: 34 : 33*	-	43 : 48 : 9 **
Household Population	180 Mio	8.7 Mio	19.5 Mio
% HH Size With 4+ Members	23	50	36

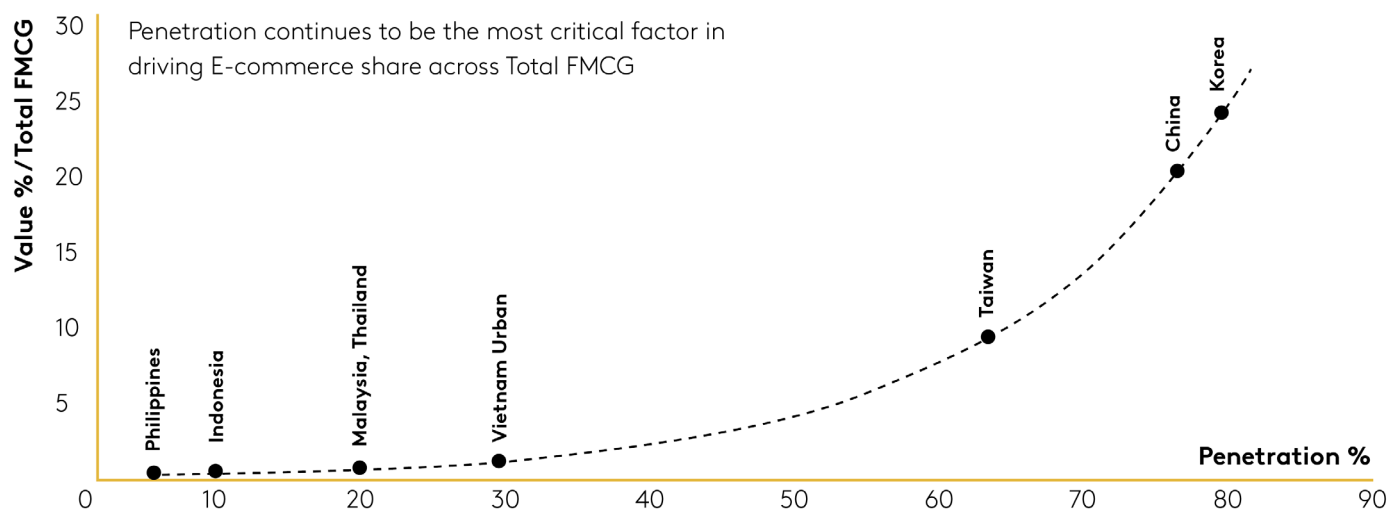
Data Period : FY2019  
 \*China - Key+A : PLC : CLC+County  
 \*\*Korea - Seoul + Major Cities : Small & Medium Cities : Eub/Myun



# BROAD SPECTRUM OF ASIA CONSUMER

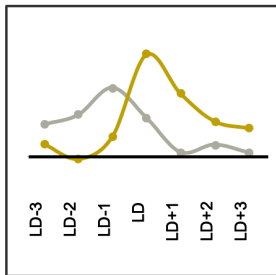
## 2. WHILST WE SEE A BIG SHIFT TO EC SPEND, SOUTH EAST ASIA (SEA) FMCG IS STILL IN ITS INFANCY STAGE RELATIVE TO NORTH ASIA

The options to purchase via EC/O2O has played a critical role on overall FMCG across China, Korea during the restrictive movement control.





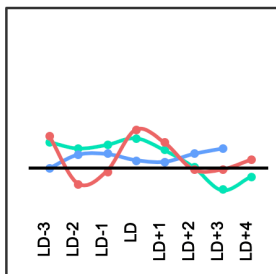
## 4 CLUSTERS OBSERVED ACROSS ASIA BASED ON HOW THEY SHOP PRE AND POST LD



### 1. OVERLY CAUTIOUS

- Shoppers react by making big purchases ahead of and during LD
- The growth trend continues during LD.

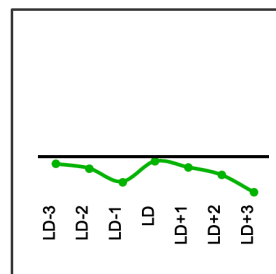
**Big Question:** Has these markets bought more than what they need; will we see a dip in the coming months?



### 2. UNDETERRED

- Minimal/ Low impact on overall FMCG purchase due to lower restrictions on mobility.
- Upcoming festivities/celebration potentially help to spur growth?

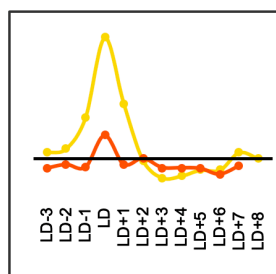
**Big Question:** Can we expect it to continue to be undeterred i.e. business as usual?



### 3. CHALLENGED

- Decline observed before LD and after Lockdown
- No obvious signs of recovery yet

**Big Question:** When can we expect the market picking up? How can I stimulate the growth?



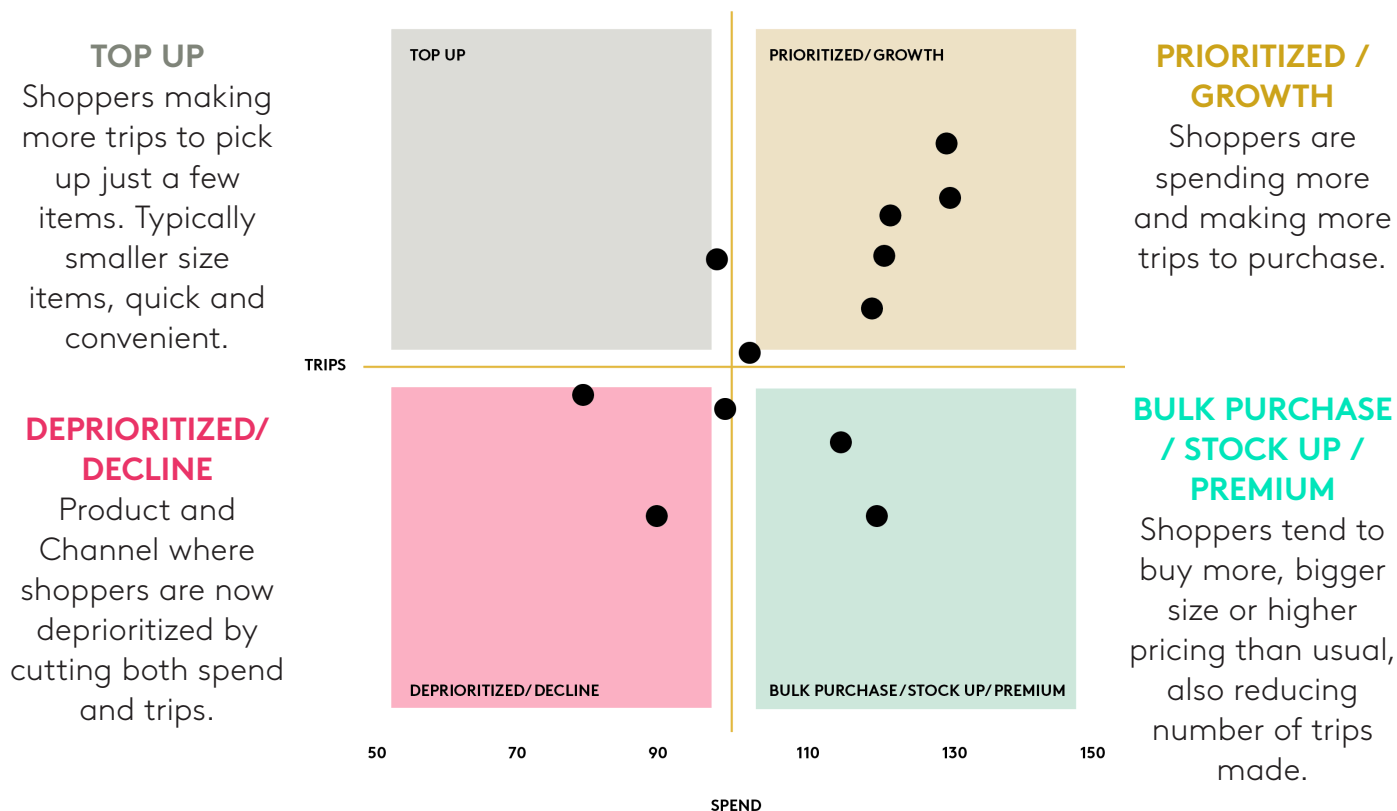
### 4. ROAD TO RECOVERY

- Countries in a 'Sudden shock' with little time for consumers shoppers to react
- Seeing signs of early recovery post LD

**Big Question:** How soon can these markets recover and is full recovery possibly?



## SPEND vs TRIP - CATEGORIES/CHANNEL GRID EXPLAINED PLUS ITS POTENTIAL IMPLICATION



### IMPLICATIONS

- Important to have the right product/pack portfolio mix and in the right trade channel.
- Important to continue supporting availability at trade channel level ensuring that we win against competitors.
- How do we spur occasions/ needs – communicating the right messages to regain relevance to shoppers decision & basket.
- Important to have the right product/pack portfolio mix and in the right trade channel; explore the potential to upsize/ premium?

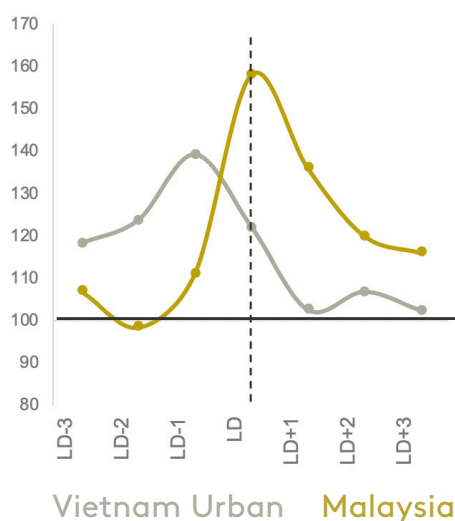


## IN-HOME PURCHASING BEHAVIOR DURING LOCKDOWN

BASED ON THE AFOREMENTIONED CLUSTERS, IT IS CLEAR THAT SOME COUNTRIES HAVE SEEN A DRASTIC CHANGE IN THEIR SHOPPING PATTERNS, WHILE THE REACTIONS OF SOME ARE MUTED

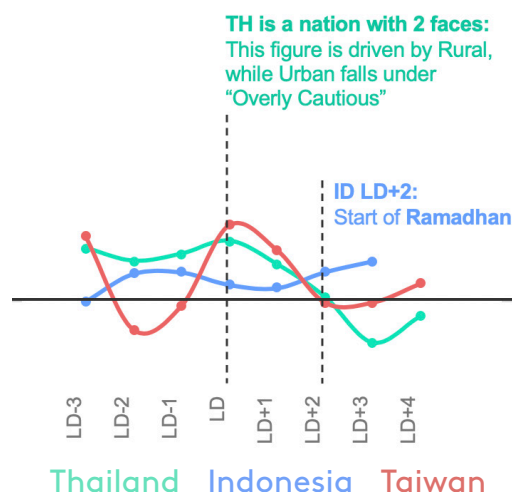
### OVERLY CAUTIOUS

Vietnam has the lowest number of cases but they have been swift to react!



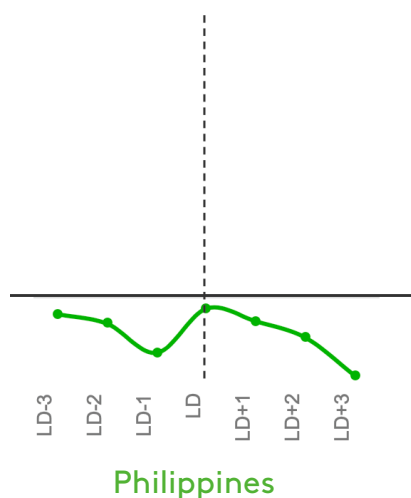
### UNDETERRED

Indonesia - the highest number of cases in SEA but experienced very little impact.



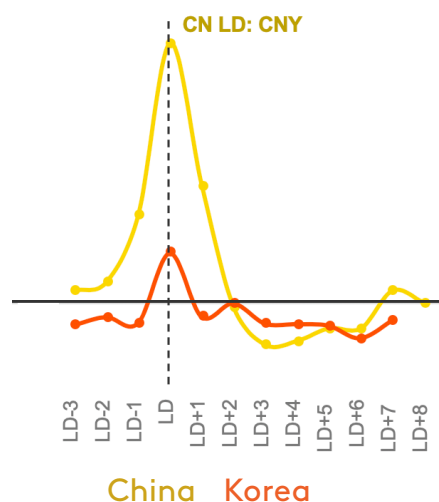
### CHALLENGED

Philippines' prolong LD begins to take a deeper toll on the overall FMCG market



### ROAD TO RECOVERY

China and S Korea started to see a rebound+ 6 weeks post LD



Weekly FMCG Spend Index to Avg Weeks in Feb 20 (S Korea and to Avg Weeks in Dec 19 (China)



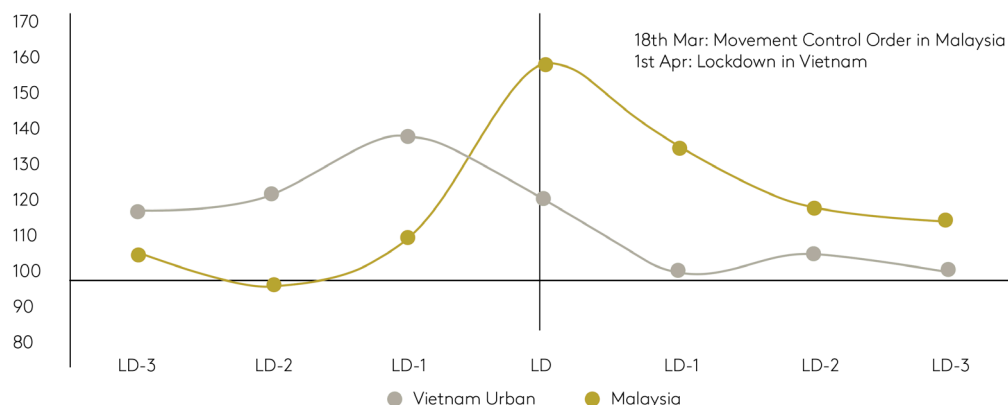
# IN-HOME PURCHASING BEHAVIOR DURING LOCKDOWN

## OVERLY CAUTIOUS:

### Malaysia and Vietnam Urban

Strict LD has led Malaysian and Vietnamese to stock up +/- 1 week of LD. With a higher spending power/larger proportion of mid-high income HHs contribution, consumers in both countries have resorted to 'stock-piling' ahead of lockdown

Weekly FMCG Spend Index to Avg Weeks in Feb  
Countries where lockdown policy was imposed early and strict



	Peninsular Malaysia	Vietnam Urban 4 KC
Length of LD	5 weeks by end of Apr	4 weeks by end of Apr
Level of LD Restriction	Strict	Strict
Average Transaction	96 x	145 x
Lower SEC Contribution (FY2019)	Low Income HHs   27%	Low Income HHs   12%
Unemployment Rate (Mar 2020)	3.90%	3.18%
MT : GT Contribution (FY2019)	79 : 21	23 : 77
E-Commerce Penetration (FY2019)	19.6	28.5
E-Commerce Share to FMCG (FY2019)	2.0	2.7

Unemployment Rate Source: Trading Economics

## LOOKING AHEAD – WHAT OUR EXPERTS SAY



Fabrice Carrasco,  
Managing Director,  
Worldpanel Philippines  
& Vietnam

### VIETNAM

"Vietnam is witnessing a 'slow and steady' return to normalcy. We are anticipating a net growth of about 5% for both Urban and Rural Vietnam on Total FMCG. Vietnamese will continue prioritizing Foods & Beverages, Hygiene and Nutrition categories. Specific to Urban households, Occasional treats as well. In contrast to the rest of the world, Vietnamese does have a more positive outlook for the future post Covid-19. To succeed, it is important to keep a close pulse on how the pandemic has affected the overall income, identify new usage occasions / habits that have emerged and continue building / investing in emerging channels such as minimarkets and CVS, specialty stores, e-commerce and O2O".



## IN-HOME PURCHASING BEHAVIOR DURING LOCKDOWN



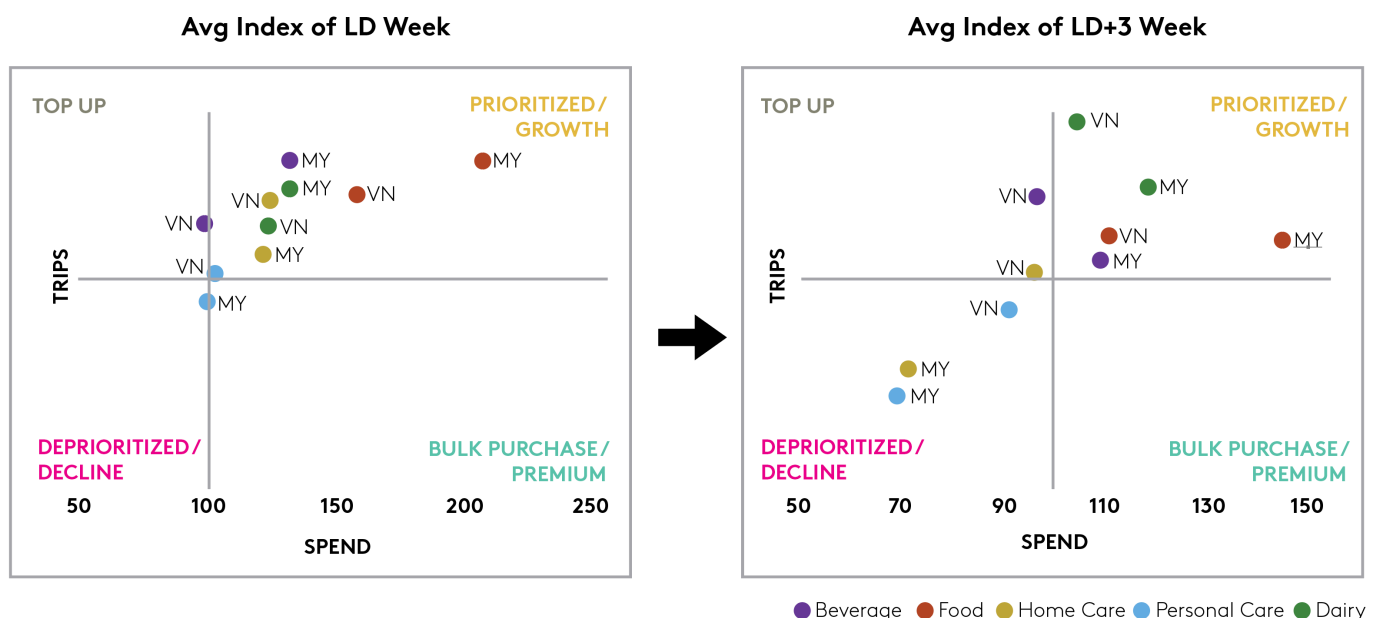
Howard Chang,  
Managing Director,  
Worldpanel Malaysia  
and Thailand

### MALAYSIA

"Peninsular Malaysia recorded its **highest ever growth in a decade (if not ever)** at 10% YTD April. The growth is fuelled by Packaged food i.e. especially convenience driven such as instant noodles and cooking related products. The strict movement control has resulted in **more in-home meal preparation**. We also see a surge in 'searches for cooking recipe' as reported by Google Trend since the lock down. Evidently, what we need to be mindful of is, '**Whether the stay home economy will continue even after the restrictions are lifted in the coming 3 months?** Or would Malaysian resort to resuming to their pre-lockdown habits?' With unemployment concerns escalating and the **high possibility of a 'tightening of the wallet'**, it would be interesting to see how consumers/shoppers react i.e. **would they be considering a trade down in brand/spend or rely more towards promotions**".

## MALAYSIANS AND VIETNAMESE STOCK UP ACROSS ALL SECTORS; HOWEVER, IT WAS A TEMPORAL REACTION

Foods, Dairy and Beverages are among the sectors that people keep yet Personal Care received a hit as it's being deprioritized.



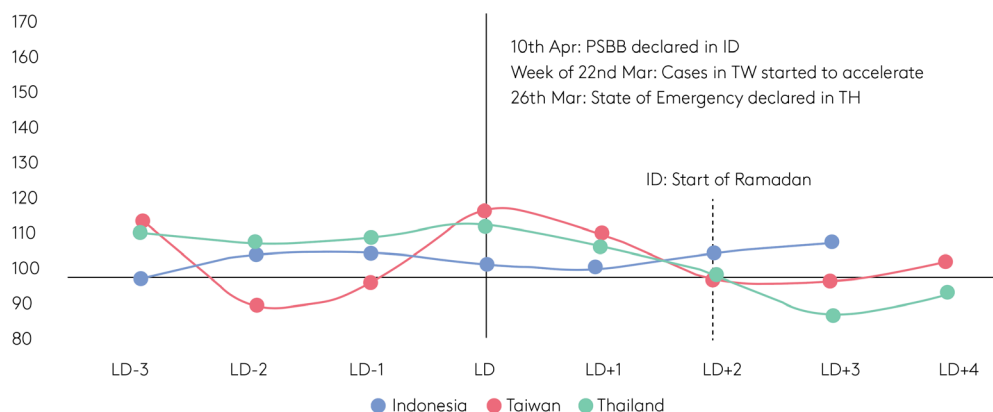


# IN-HOME PURCHASING BEHAVIOR DURING LOCKDOWN

## UNDETERRED: Indonesia, Thailand and Taiwan

Restriction level are more flexible, hence limited impact are seen in these markets. The Key Watch Out here is Indonesia – where they are not yet 'out of the woods'; plus a significantly higher proportion of Lower SEC.

Weekly FMCG Spend Index to Avg Weeks in Feb  
Countries with more flexible or no Lockdown Policies



	Indonesia	Taiwan	Thailand
Level of LD Restriction	Flexible	Flexible	Flexible
Average Transaction	301 x	97 x	183 x
Lower SEC Contribution (FY2019)	SEC CDE   68%	Low Income   12%	Low Income   15%
Unemployment Rate (Mar 2020)	*5.01%	3.76%	1.00%
MT : GT Contribution (FY2019)	30 : 70	99 : 1	47 : 53
E-Commerce Penetration (FY2019)	10.4	63.0	19.9
E-Commerce Share to FMCG (FY2019)	0.4	9.1	2.3

Unemployment Rate Source: Trading Economics  
\*Note: ID unemployment rate Feb 2020

## LOOKING AHEAD – WHAT OUR EXPERTS SAY



Jason Yu,  
Managing Director,  
Worldpanel Greater  
China

### TAIWAN

"Taiwan's FMCG market grew strongly in Q1 2020, as consumers rushed to stockpile cleansing and daily necessities. The challenge for marketers will be how to keep the growth momentum and create new occasions when the market returns to normalcy. Regular cleaning and in-home dining habits are here to stay at least for the coming +3 months. With significant pantry loading in Q1, the growth for the remainder of the year will generally slow down, however, it will be interesting to see what 'new' lifestyles and behaviours will emerge. Besides, the acceleration in retail digitalization will mean rapid transformation in delivery of customer experience and personalized communication along the path to purchase".



# IN-HOME PURCHASING BEHAVIOR DURING LOCKDOWN



Venu Madhav,  
General Manager  
Worldpanel Indonesia

## INDONESIA

"Even though there was 'Large Scale Social Restriction' from beginning April, overall FMCG continues to grow at a healthy pace – particularly for Essential Dairy and Food categories. We expect the current positive trend in overall FMCG to carry on for the coming 3 months with biggest gainers coming through proximity channels i.e. Minimarkets and General Trade. Out of home consumption will see a marginal decline. I'm confident that overall FMCG will continue to grow for this year. The performance of manufacturer/brands will depend on how agile they can be in reacting to these changes and prioritizing the right levers, such as channel and product SKU mix"



Howard Chang,  
Managing Director,  
Worldpanel Malaysia  
and Thailand

## THAILAND

"After a short-term spike of in consumer spend across Staples and packaged food categories, we are seeing spends return to 'normal' with an ease on restriction since May 3rd. Staples and cooking related products benefited from the stay home economy, however, this came with a trade off from personal care. OOH categories, such as coffee from cafes and ice cream from restaurant were negatively impacted due to temporary closure and social distancing, while spend on most packaged snack and beverages products remained robust. What's worth watching over the next +3 months is how consumer spend would be impacted by higher unemployment rate. Two positive news for Thailand FMCG are the lower number of confirmed cases than neighbouring SEA countries and the start of easing restrictions from early May. However, we can expect consumers wallet will be smaller than what they had same time last year".

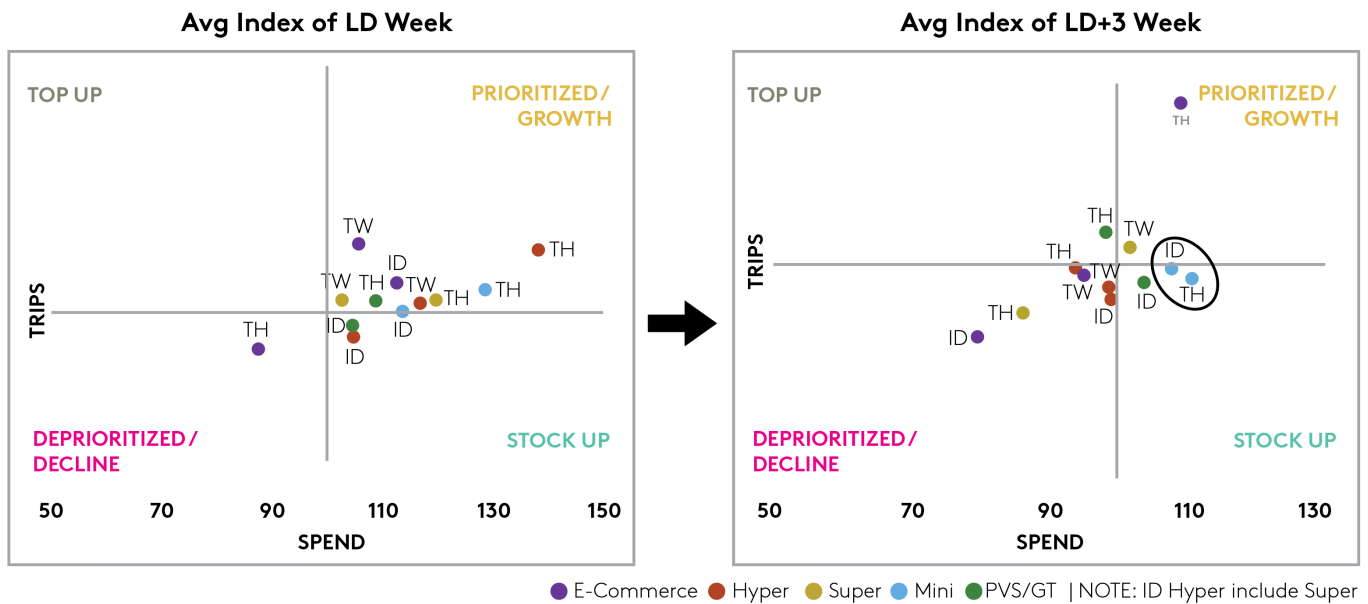




## IN-HOME PURCHASING BEHAVIOR DURING LOCKDOWN

### LIFE AS USUAL BUT PROXIMITY AND SMALLER SCALE CHANNELS ARE THE KEY DESTINATIONS NOW

Minimarket gained traction in across markets, mostly from shoppers making more trips. Meanwhile, big stores (Hyper, Super) are now being deprioritized, most likely due to avoidance of crowd.





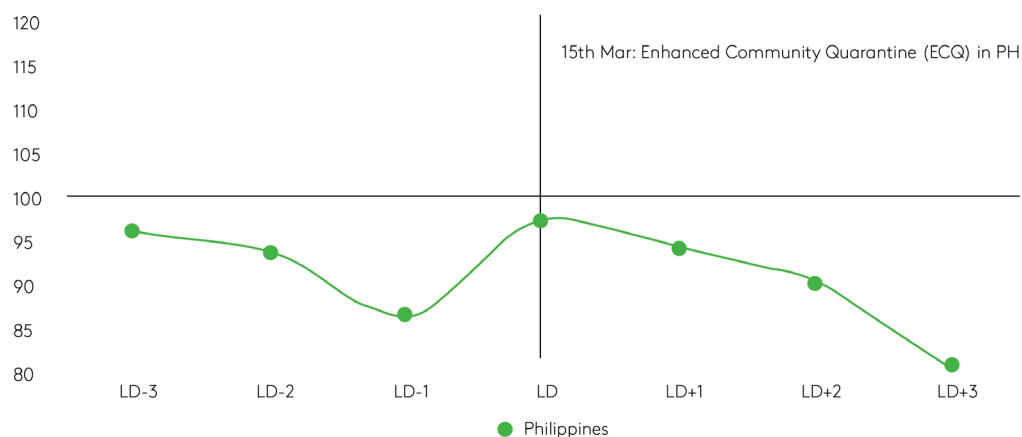
# IN-HOME PURCHASING BEHAVIOR DURING LOCKDOWN

## CHALLENGED:

### Philippines

A real cause for concern  
- From everyday shopping to a strict LD; coupled with the largest lower income group in the region.

Weekly FMCG Spend Index to Avg Weeks in Feb  
Countries where lockdown policy was imposed early and strict



Philippines	
Level of LD Restriction	Strict
Average Transaction	374 x
Lower SEC Contribution (FY2019)	SEC CDE   84%
Unemployment Rate (Mar 2020)	5.30%
MT : GT Contribution (FY2019)	56 : 44
E-Commerce Penetration (FY2019)	5.7
E-Commerce Share to FMCG (FY2019)	0.1

Unemployment Rate Source: Trading Economics

## LOOKING AHEAD – WHAT OUR EXPERTS SAY



Marie Anne Lezoraine,  
General Manager,  
Worldpanel Philippines

### PHILIPPINES

"Filipinos shopping behaviour has been **severely disrupted** in the last few months. Under normal circumstances, Filipinos **typically make FMCG purchases daily**. To minimize the risks of exposure and to comply with local policies, the **number of shopping trips made has reduced significantly**. Whilst the **higher SEC have compensated** for this through stockpiling, the ability to do the same for **lower SEC is more limited**; this directly impacts overall FMCG expenditure. As we move into a General Community Quarantine, we may see a stabilisation of behaviours and new routines emerging. I **don't anticipate frequency of purchase returning immediately** as a majority will continue to be very mindful of their budget and keeping social distancing. Personal care categories may see an initial recovery as consumer/shoppers starts going out whereas impulse categories may remain challenged".



With a direct impact on shopping frequency, the LD has the largest impact on the PH markets across sectors.





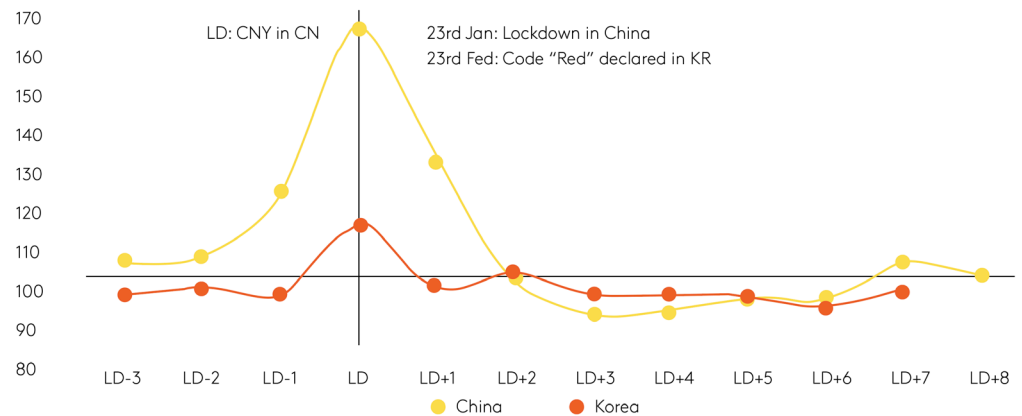
# IN-HOME PURCHASING BEHAVIOR DURING LOCKDOWN

## ROAD TO RECOVERY:

### China and Korea

Both markets seeing a rebound post 5 - 6 weeks of LD. EC/020 critical in helping the overall FMCG - allowing consumers to continue purchasing at the comfort of their homes during lockdown.

Weekly FMCG Spend Index to Avg Weeks in Feb (S Korea) and to Avg Weeks in Dec 19 (China)  
Countries who have passed the peak of cases



	China	South Korea
Length of LD	9 weeks by End of March	No LD
Level of LD Restriction	Strict	Flexible
Average Transaction	81 x	134 x
Lower SEC Contribution (FY2019)	Low Income   30.2%	Low Income   10.9%
Unemployment Rate (Mar 2020)	5.90%	3.80%
MT : GT Contribution (FY2019)	88 : 22	90 : 10
E-Commerce Penetration (FY2019)	78.5	81.9
E-Commerce Share to FMCG (FY2019)	19.7	21.8

Unemployment Rate Source: Trading Economics

## LOOKING AHEAD – WHAT OUR EXPERTS SAY



Jason Yu,  
Managing Director,  
Worldpanel Greater  
China

### CHINA

"China recorded a drop of 6.7% in Q1'20, compared to the same period in 2019. The recovery of China post 7 weeks after the lockdown is truly remarkable. Younger consumers, who were leading the market growth in the past years, as well as West region consumers were more resilient. Further recovery is anticipated though the pattern of this recovery varies by sector. In the coming month, non-essential categories which suffered most from COVID-19 are likely to promote more aggressively through 618 shopping festivals. E-commerce giants such as Alibaba, JD and Pinduoduo are geared up to boost sales with the integration of live streaming platforms. At the same time, brands are partnering with key brick and mortar customers to enhance their O2O (online to offline) capabilities to make right products accessible to consumers through clicks at their fingertips. The year of 2020 is set to be a challenging year for FMCG as part of the loss in consumptions is unlikely to be recovered. Brands can still thrive through the uncertainties via rapid shift of investment and agile innovations to tap into the changing consumer demands".



## IN-HOME PURCHASING BEHAVIOR DURING LOCKDOWN



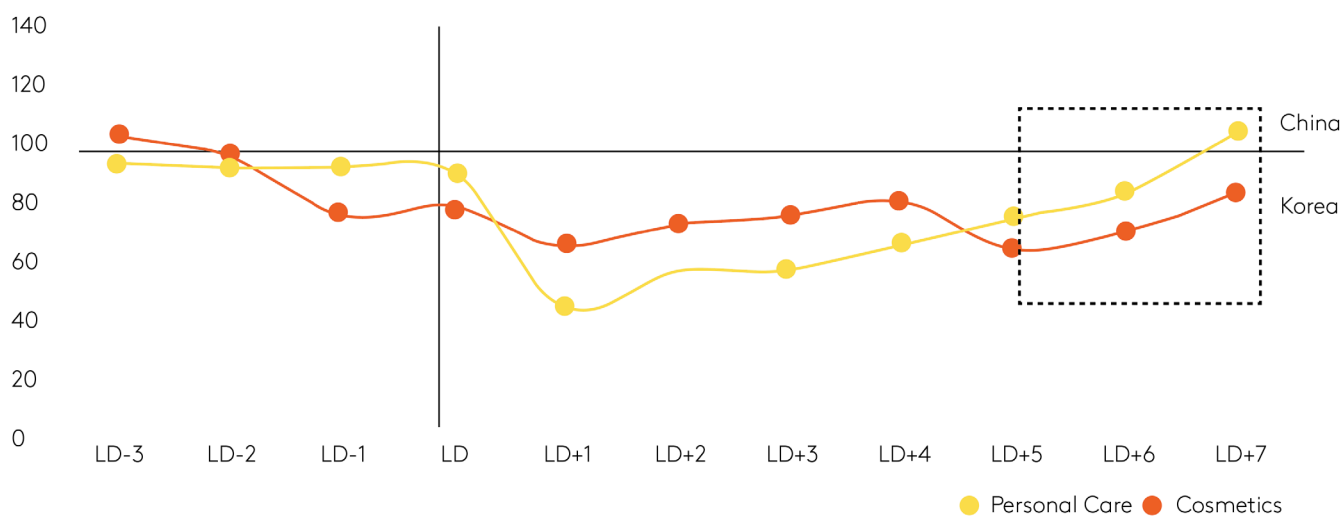
Francis Oh,  
General Manager,  
Worldpanel Korea

### S. KOREA

"COVID-19 brought about a significant growth to Korean FMCG market, due to more time spent at home (Work and/or School). **Stock-up, Panic-Buy were not so visible in Korea compared to other Asian Markets.** As consumers spent more time at home, food categories have shown a stronger growth compared to Non-Food categories. However, hygiene related categories such as hand wash, mouth wash and masks performance significantly better. Equally, **online sales accelerated during the pandemic and it will continue to play as a critical channel throughout the year. Although the overall outlook is positive compared to last year, I anticipate the market growth will start to slow down in 2nd half of 2020**".

PERSONAL CARE BEING THE MOST IMPACTED SECTOR IS SEEING A REBOUND 5 WEEKS POST LD.

Weekly FMCG Personal Care & Cosmetics Spend Index to Avg Weeks in Feb 2020





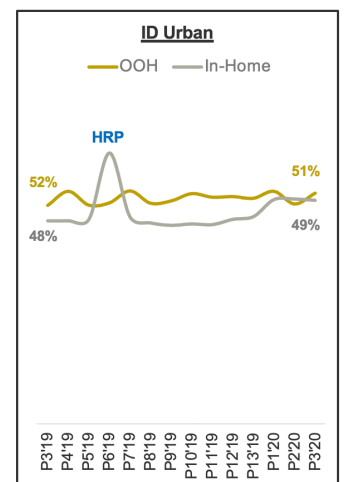
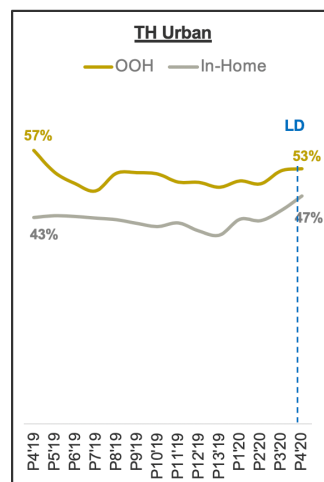
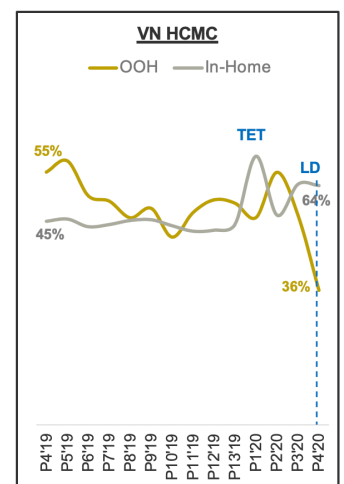
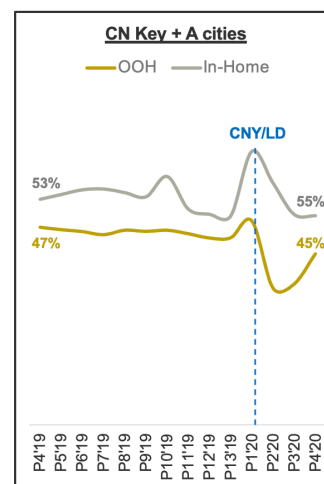


## OUT OF HOME SPENDING IS NOT THE SAME ACROSS MARKETS

Where there is tighter movement control (China and Vietnam), we see it being impacted. However as LD is lifted, a very quick rebound.

Following our continuous tracking on the Out of Home (OOH) spend – data up to P4' 2020; specific to the Packaged Food and Beverage sector, Urban Thailand and Urban Indonesia seems undeterred – similar to what we have observed from the In-Home purchasing behaviours. This highly correlates to what is seemingly a more 'flexible' level of lockdown restriction in market.

In contrast, China Urban and Ho Chi Minh, Vietnam showed a significant decline in consumers/shoppers' spend OOH during the period of lockdown – arguably due to stricter movement control in place in these markets. More interestingly, what is clear is the fact that transaction/ frequency of visit is the core reason for the decline in the OOH spend in these markets – where both Urban Chinese and Saigonese have halved their number of trips. Post lockdown, China urban has rebounded strongly, similar to the in-home spend and we anticipate it to go back to its 'growing ways' – although the category prioritization may differ. As for Ho Chi Minh, we are expecting a similar rebound as observed in China Urban on OOH expenditures.



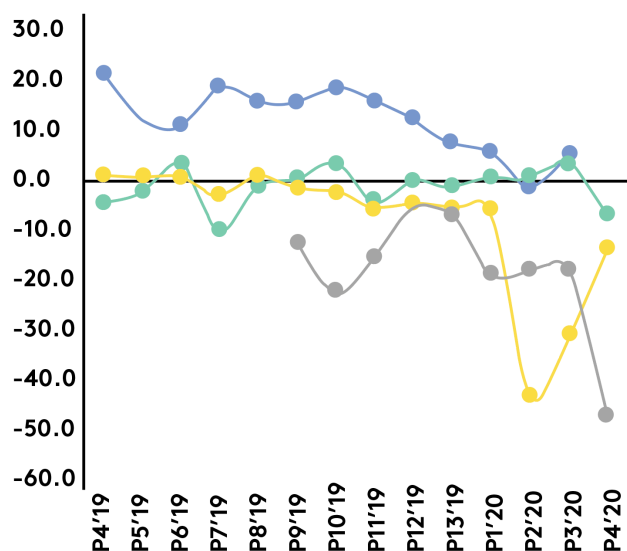
Spend (USD) - Total Drinks + Snacking



## RELEVANCE OF OUT OF HOME DURING THE LOCKDOWN

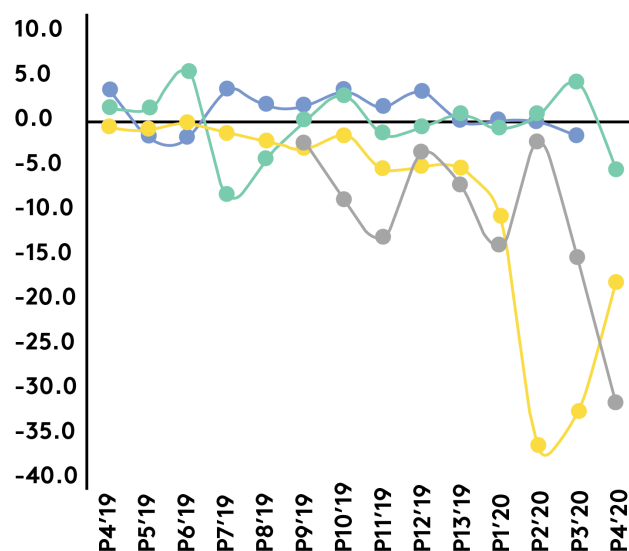
### THE DECLINE IN OOH IS MAINLY DRIVEN BY FREQUENCY (NOT PENETRATION)

4 w/e % Growth - Spend vs. YA - Total OOH



■ CN Key + A Recovery  
■ VN HCMC Challenged  
■ TH Urban Undeterred  
■ ID Urban

4 w/e % Growth - Frequency vs. YA - Total OOH



### POCKETS OF OPPORTUNITY STILL EXISTS FOR A NUMBER OF CATEGORIES

"Hunger fill" and "Nutritious / health" categories have benefited whereas Indulgence categories have declined. Some categories have also seen a sales shift from OOH to more In home.

#### Growing Categories



+ 27%  
Milk  
China,  
Key+A Cities



+ 122%  
Packaged  
Bread  
Ho Chi Minh

#### Limited Impact



+ 13%  
Salty Snacks  
Indonesia Urban



- 3%  
Salty Snacks  
China,  
Key+A Cities

#### Declining Categories



- 14%  
RTD Tea  
Thailand  
Urban  
(OOH)

+ 14%  
RTD Tea  
Thailand  
Urban  
(In Home)



- 52%  
Liquid Milk  
Ho Chi Minh  
(OOH)

+ 12%  
Liquid Milk  
Ho Chi Minh  
(In Home)

Data period (CN,VN,TH): 12 w/e Apr 2020 vs. YA | Data period (ID): 12 w/e Mar 2020 vs. YA



## RELEVANCE OF OUT OF HOME DURING THE LOCKDOWN

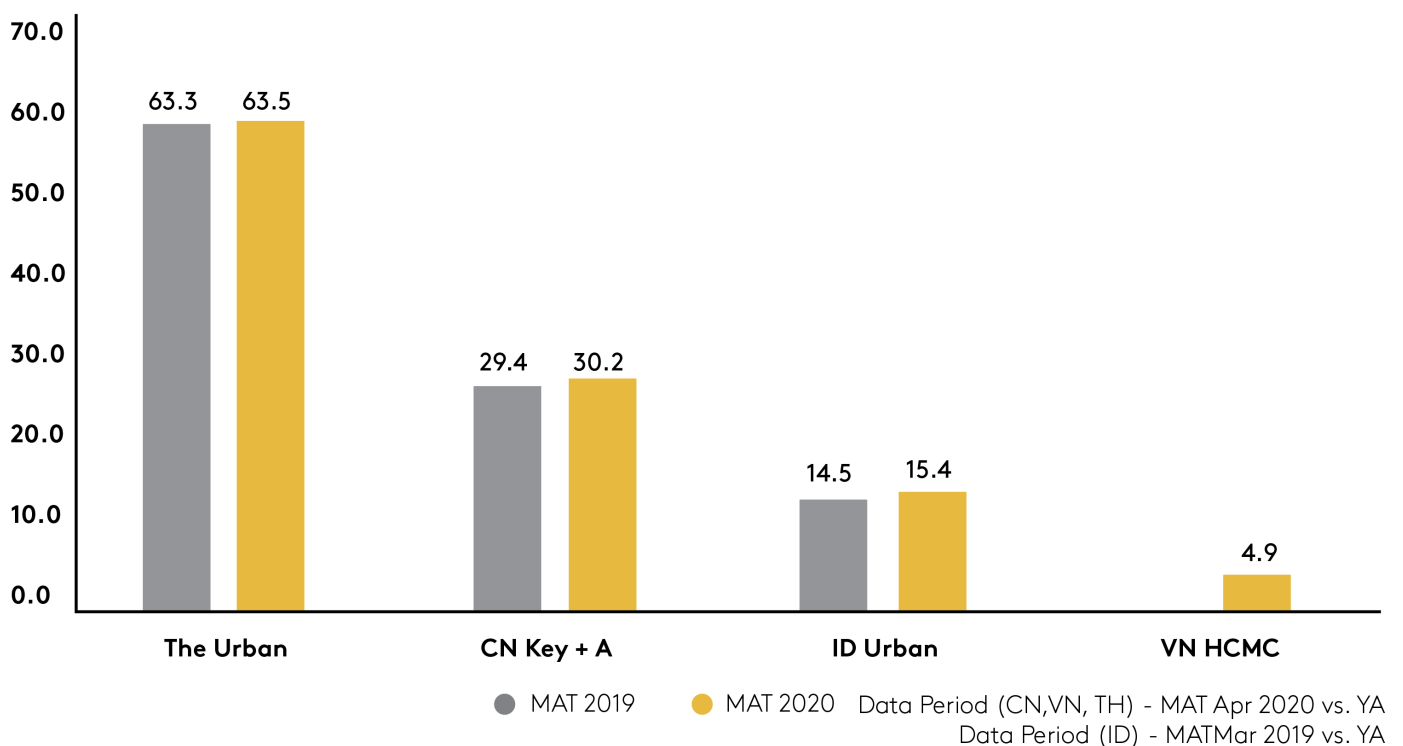


### CVS IS NOT SYNONYMOUS TO OOH!

OOH strategy needs to lend its focus differently by market - traditional channels also play a role in driving OOH purchase

Equally, it is common to associate Convenience stores to OOH; however we need to be mindful that Convenience stores development by market are also different. Whilst the key benefit and feature of a Convenience store is its Proximity, given that it is not as widely available relative to in-market such as Ho Chi Minh and Indonesia Urban, we can expect General trade (e.g. local Mom & Pa/ minimarkets) to play a more important role. Ensuring the right pack and price configuration and product availability across channel formats is key to ensure that we seize the moment to retain and grow our business within the OOH consumers/shoppers.

**Spend % - CVS - Total OOH Drinks + Snacking**





# FOOD FOR THOUGHTS FOR BRANDS AND RETAILERS

## WHAT IS CURRENTLY HAPPENING



Malaysia, Vietnam  
Urban

### OVERLY CAUTIOUS

markets - A strong positive impact on In Home purchasing toward the outbreak as strict restrictions on mobility were enforced.



Indonesia, Taiwan,  
Thailand

### UNDETERRED

markets- A more muted impact on In Home purchasing as mobility was not strictly monitored.



Philippines

### CHALLENGED

market - A hard clamp on mobility, possibly resulting in the fundamental weakening in spending power leading to an overall decline in In Home purchases.



South Korea,  
China

### ROAD TO RECOVERY

markets- Initial impact on FCMG was damning, but we see signs of recovery 5 to 6 weeks after, as these countries return to "normality".

## OUT OF HOME IS STILL RELEVANT

"Hunger filler" and "Nutrition" categories are still in demand, even when mobility restrictions were in place.

## WHAT DO WE NEED TO THINK ABOUT NOW

1. Where does my category fit today, and how are they currently performing / consumed?
2. How has the profile of my buyers changed – who have I managed to acquire, retained and who do I need to reclaim?
3. What occasions/ needs can I push to drive back/ more relevancy of my category & brands?
4. Should I re-evaluate my retailer and channel strategy in post LD – what calibrations should I be making to my business plans?
5. Is my pack-price strategy right for the new 'normal' post lock down – how do I maximize my reach to the potentially 'displaced' consumers/ new needs?
6. If my category is driven by impulse purchasing, how can I leverage on new In-Home occasions?



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# KANTAR

### ABOUT KANTAR

Kantar is the world's leading evidence-based insights and consulting company. We have a complete, unique and rounded understanding of how people think, feel and act; globally and locally in over 90 markets. By combining the deep expertise of our people, our data resources and benchmarks, our innovative analytics and technology, we help our clients understand people and inspire growth.

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