CONSUMER INSIGHTS
ASIA 2013

Back to the beginning

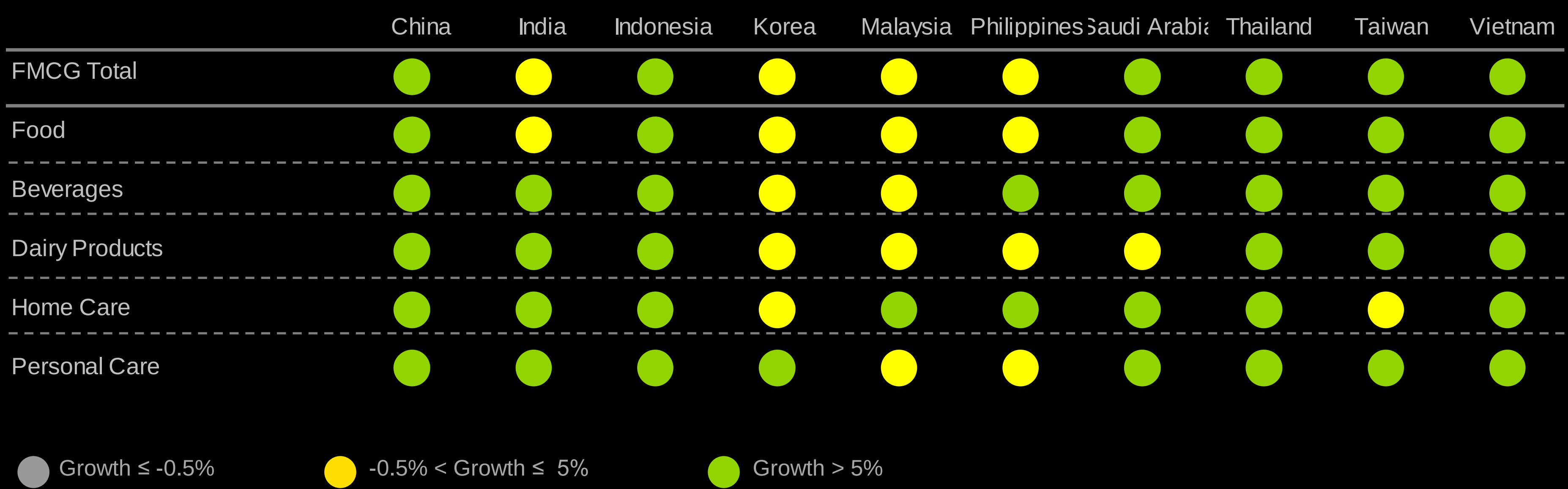
MAT Q2`13 | SUMMARY ASIA

#Slowdown Although still growing, FMCG faces a slowdown in most countries

#FromHyperToMini Hypermarkets have lost share in past two years in Taiwan, Thailand, Saudi, Malaysia, Korea where Minimarkets, CVS or e-commerce (Korea) gained ground

#TopRecruiters Dairy categories (yogurts, milk, cheese), ice cream, RTD tea, cereals, deodorant and wet tissues expanding consumer base across Asia

% Value Change FMCG – MAT Q2 2013 vs. Year ago



Back to the beginning

ASIA IN 10 CLICKS

Click on each country to display or hide Insights

#DownTrade Total FMCG market growth became lower as avg. price went down
#StrongOnline Online market keeps growing with category expansion
#UsageExpansion Baby wet tissue is gaining more buyers rapidly with larger basket, thanks to expanding usage of those without kids

#Slowdown Despite MAT growth at 9.6%, FMCG slowdown is observed compare to Q1 with flat economic performance & CCI starting to take its toll
#SureWinner Despite a slow market, entry into Costco is practically a sure ticket to success, with brands entering all performing strong
#FreezeThyAge Anti-aging skincare remain a strong sector amongst a flat beauty market, with >35 y.o driving the performance

#Reallocating FMCG moving at a slow pace despite strong economy as homes appear to be reallocating to non-necessities
#StayHealthy Yoghurt growing the fastest as players become aggressive
#Modernization Hyper-supermarkets continue to gain ground as key retailers continue to expand

#Slowdown FMCG value growth momentum in Q2'13 slowed down from 9.5% to 5.7% due to GDP growth cut down resulting in reduced number of categories per trip.
#ImpactedCategory Dairy ,Food and Personal Care are the sectors which got hit the most due to this slowdown
#PriceImpact Drop in volume for Biscuits, Hair Removal and Disinfectants due to price increase

#InflationDoubleHit Inflation accelerated to 5.9% in June as a hike in subsidized fuel prices and a seasonal increase in food prices during the Muslim fasting month
#SegmentHeroes Beverages segment grows by two digits driven by RTD Tea, RTD Juice, and RTD Coffee
#ChannelTrend Two biggest minimarket lead the other Key Accounts by reported 6.5% share in Total Trade Channel share

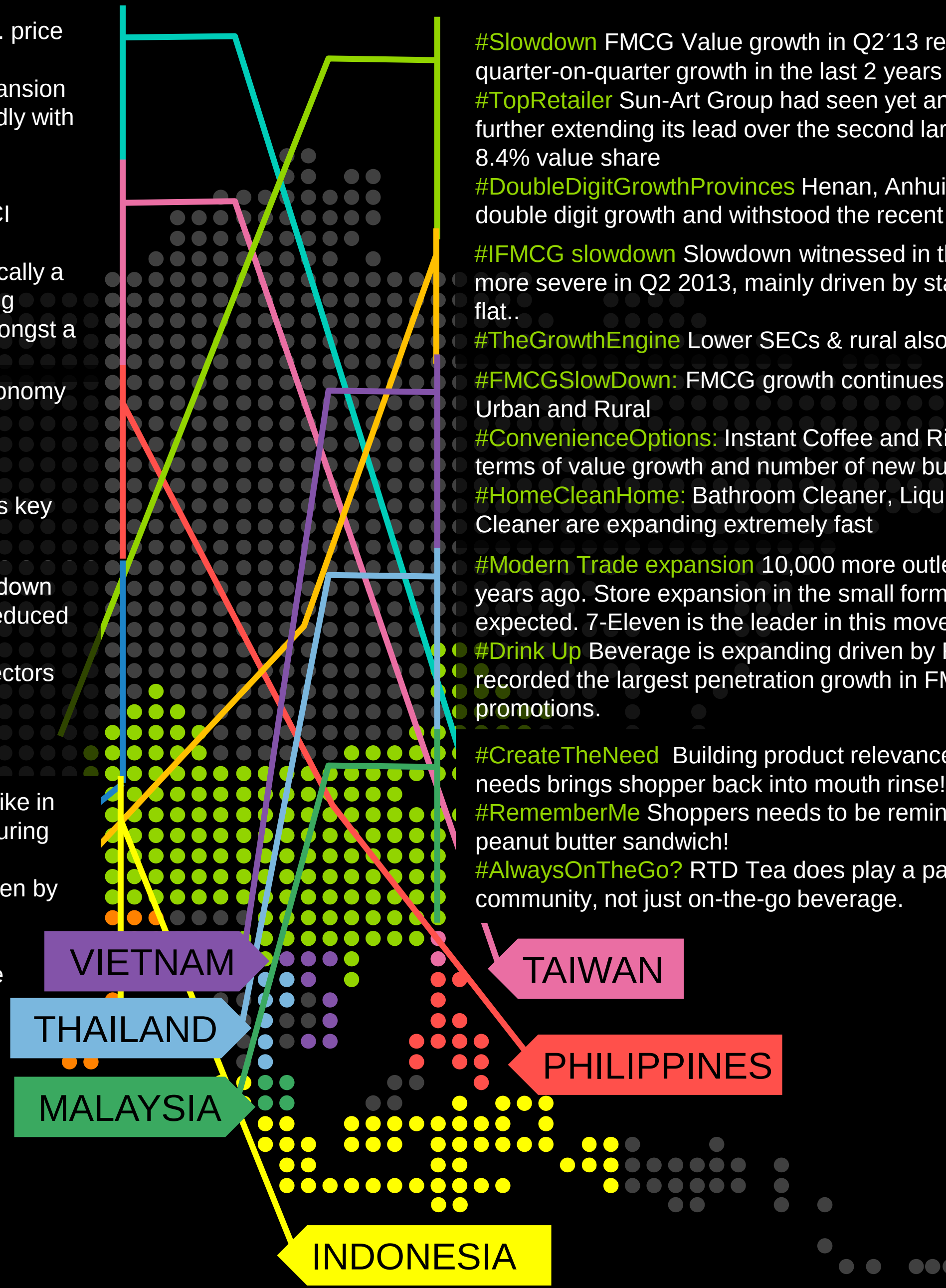
#Slowdown FMCG Value growth in Q2'13 reported 7.1%, the lowest quarter-on-quarter growth in the last 2 years
#TopRetailer Sun-Art Group had seen yet another quarter of growth further extending its lead over the second largest group and reached 8.4% value share
#DoubleDigitGrowthProvinces Henan, Anhui and Fujian delivered double digit growth and withstood the recent slowdown within FMCG

#IFMCG slowdown Slowdown witnessed in the FMCG sector. Much more severe in Q2 2013, mainly driven by staples which is almost flat..
#TheGrowthEngine Lower SECs & rural also take a hit now

#FMCGSlowDown: FMCG growth continues to slow down in both Urban and Rural
#ConvenienceOptions: Instant Coffee and Rice Soup are leading in terms of value growth and number of new buyers
#HomeCleanHome: Bathroom Cleaner, Liquid Detergent and Floor Cleaner are expanding extremely fast

#Modern Trade expansion 10,000 more outlets compared to 15 years ago. Store expansion in the small format and virtual store are expected. 7-Eleven is the leader in this movement
#Drink Up Beverage is expanding driven by RTD Tea which recorded the largest penetration growth in FMCG through heavy promotions.

#CreateTheNeed Building product relevance to cater consumers' needs brings shopper back into mouth rinse!
#RememberMe Shoppers needs to be reminded of the yummy peanut butter sandwich!
#AlwaysOnTheGo? RTD Tea does play a part in the in-home community, not just on-the-go beverage.

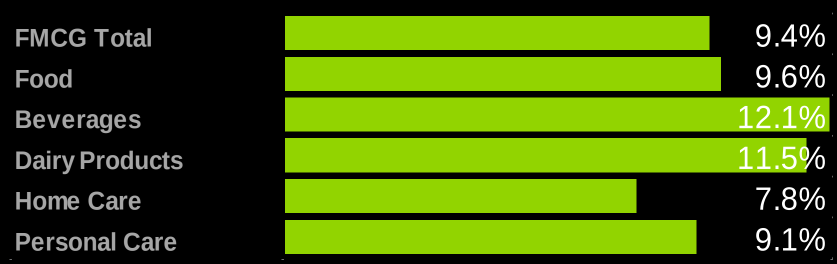


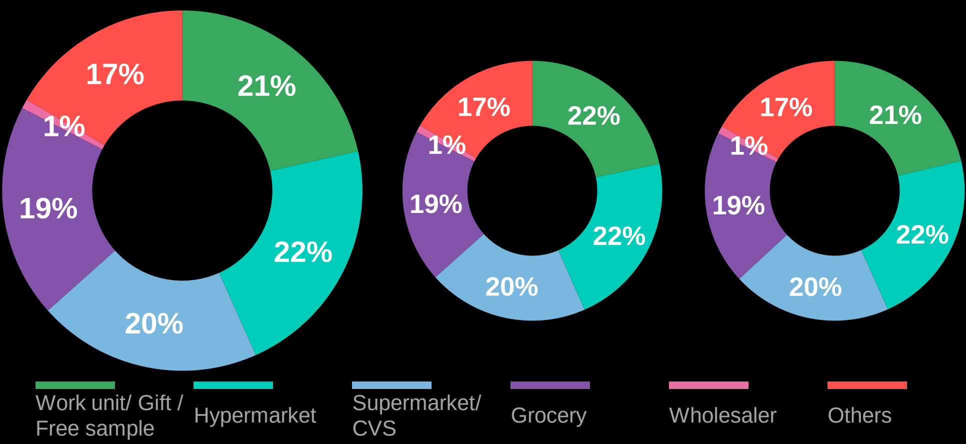
SAUDI ARABIA

By clicking on the country insights will display. Click again to hide.

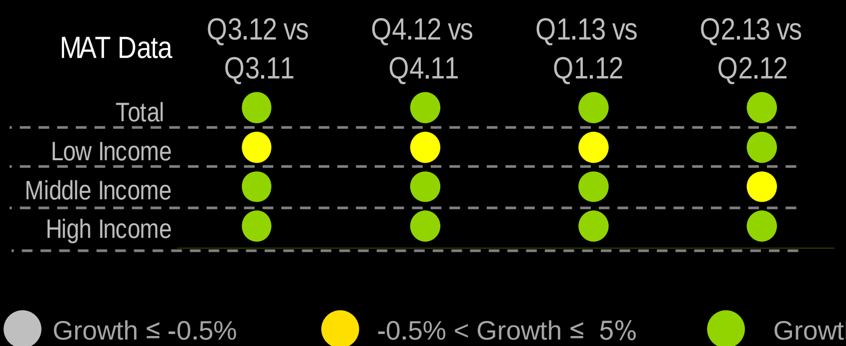
Details per country: click here

BASKET TRENDS – %Value Change MAT Q2´13 vs. YA





%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

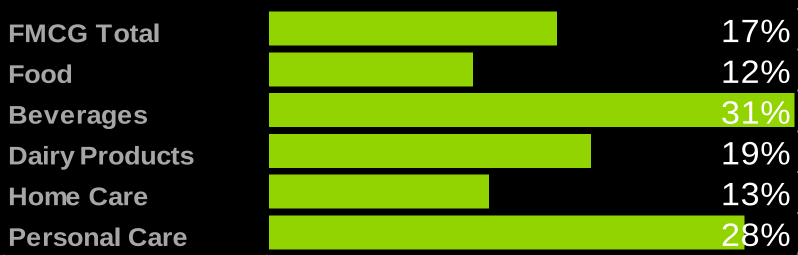


TOP 10 RECRUITERS IN CHINA (by penetration points growth)

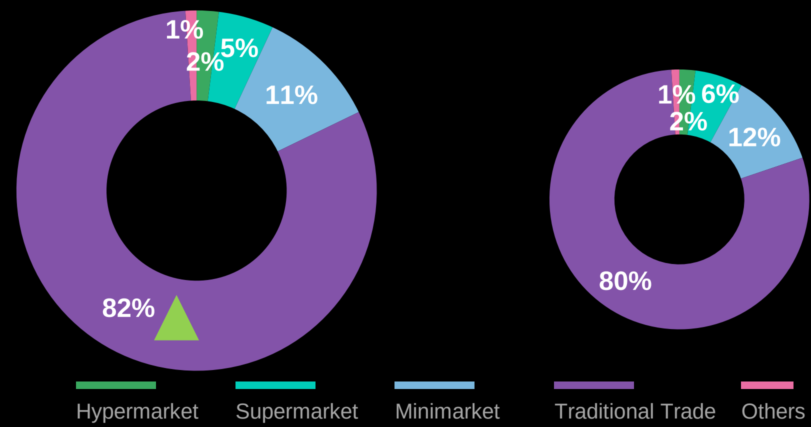
Rank 2013	Categories	Additional Penetration points
1	FUNCTION DRINK	5.6
2	MINT CANDY	3.6
3	COCO CONFECTIONARY	3.3
4	COFFEE	2.9
5	CEREALS	2.6
6	FROZEN FOOD	2.5
7	TEA	2.4
8	INSTANT SOUP	2.2
9	CHEWING GUM	2.2
10	RTD COFFEE	1.7

Source: MAT Q213 vs YA Category Penetration%

BASKET TRENDS – %Value Change MAT Q2.13 vs. YA



MAT Q2.13 MAT Q2.12



%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

MAT Data	Q4.12 vs Q4.11	Q1.13 vs Q1.12	Q2.13 vs Q2.12
Total	●	●	●
Low Income	●	●	●
Middle Income	●	●	●
High Income	●	●	●

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

TOP 10 RECRUITERS IN INDONESIA (by penetration points growth)

Rank 2013	Categories	Additional Penetration points
1	READY TO DRINK COFFEE	10.4
2	READY TO DRINK TEA	8.3
3	COLD CEREAL/CEREAL BAR	8.1
4	ICE CREAM	8
5	RTD FRUIT JUICE	7.8
6	FACIAL MOISTURISER	7.6
7	FROZEN FOOD	7.2
8	SHOWER GEL	7.1
9	MALTED/CHOCOLATE DRINK	6.4
10	CHOCOLATE	6

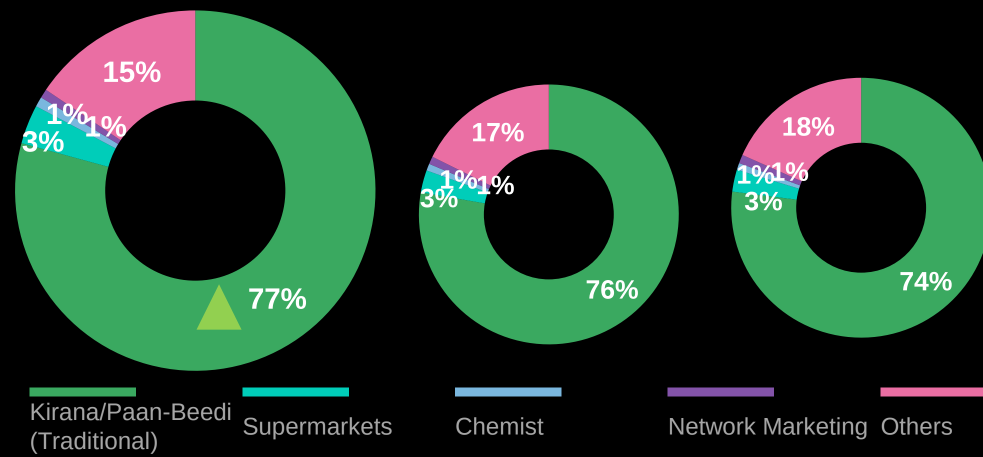
Source: MAT Q213 vs YA Category Penetration%

CN | ID | India | KR | MY | PH | KSA | TH | TW | VN

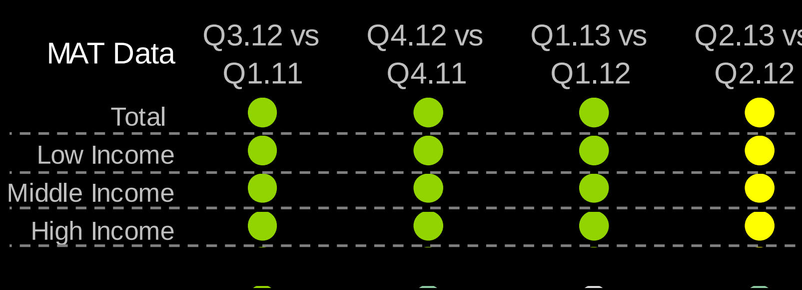
Back Homepage | Back to Summary Asia

BASKET TRENDS – %Value Change MAT Q2´13 vs. YA

MAT Q2.13 | MAT Q2.12 | MAT Q2.11



%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL



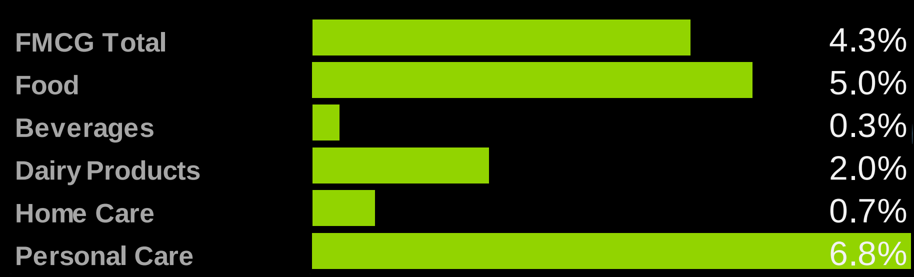
Growth ≤ -0.5% | -0.5% < Growth ≤ 5% | Growth > 5%

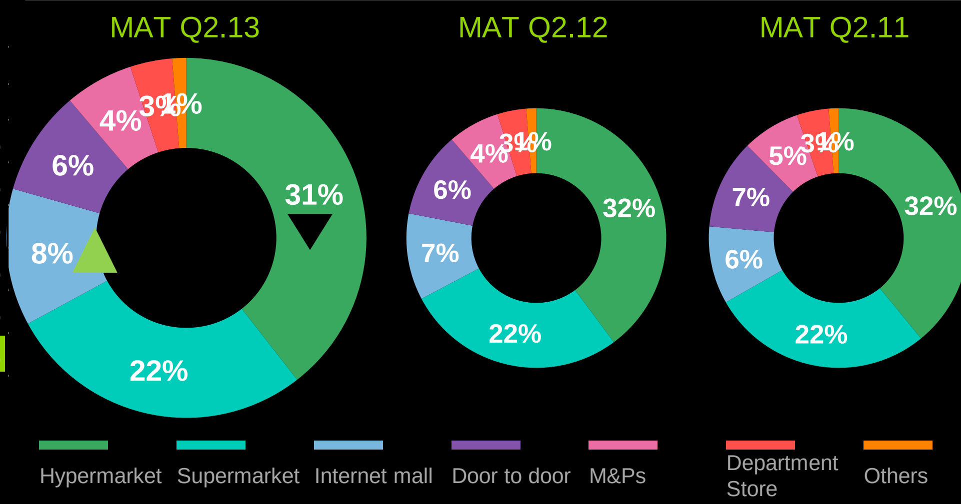
TOP 10 RECRUITERS IN INDIA (by penetration points growth)

Rank 2013	Categories	Additional Penetration points
1	INSECTICIDES	2.1
2	BREAKFAST CEREAL	1.4
3	FLOOR CLEANER	1.3
4	NOODLES	1.2
5	METAL SCOURERS	0.5
6	BUTTER/CHEESE	0.5
7	COOK MIXES	0.4
8	READY TO COOK CURRY PASTES	0.3
9	MILK FOOD DRINKS	0.2
10	SANITARY PRODUCT	0.2

Source: MAT Q213 vs YA Category Penetration%

BASKET TRENDS – %Value Change MAT Q2´13 vs. YA





%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

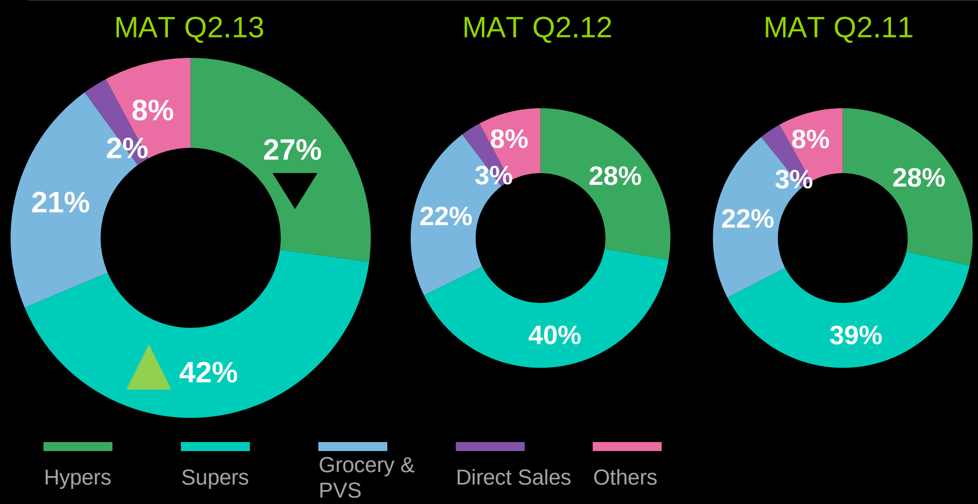
TOP 10 FMCG BRANDS IN SOUTH KOREA (by consumer reach points)

Rank 2013	Categories	Additional Penetration points
1	WET TISSUE	6.2
2	CHEESE	4.9
3	WATER	3.8
4	LOTIONS	3.7
5	MOUTHWASH	3.3
6	ESSENCE	3.2
7	BODY CLEANSER	2.6
8	OTHER NOODLES	2.4
9	CREAM	2.4
10	SAUCE	2.2

Source: MAT Q213 vs YA Category Penetration%

BASKET TRENDS – %Value Change MAT Q2´13 vs. YA

FMCG Total	4.5%
Food	4.0%
Beverages	4.9%
Dairy Products	4.5%
Home Care	6.9%
Personal Care	3.7%



%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

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

TOP 10 RECRUITERS IN MALAYSIA (by penetration points growth)

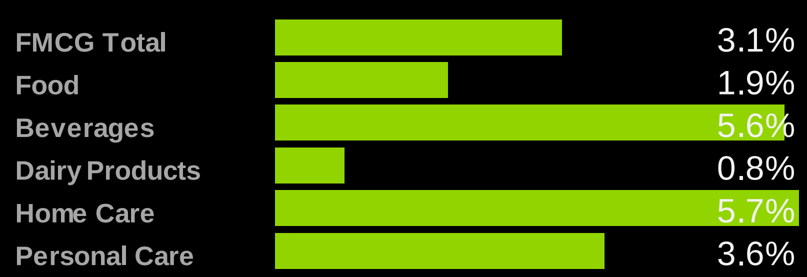
Rank 2013	Categories	Additional Penetration points
1	PEANUT BUTTER	4.5
2	YOGHURT DRINK	4.5
3	RTD TEA	3.9
4	LIPSTICKS	3.0
5	CULTURED MILK	3.0
6	SPAGETTI	2.8
7	MOUTH RINSE	2.7
8	CHEESE	2.6
9	SOY MILK	2.6
10	YOGHURTS	2.1

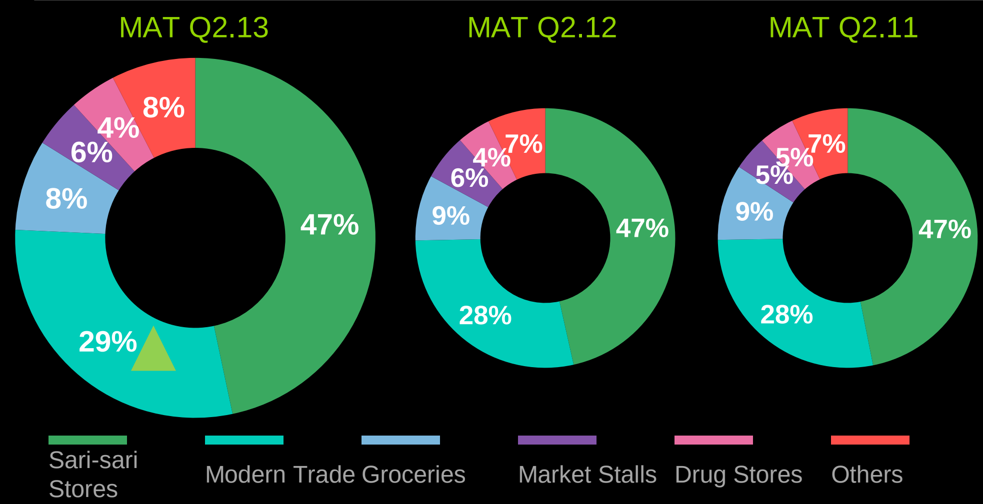
Source: MAT Q213 vs YA Category Penetration%

CN | ID | IN | KR | MY | **Philippines** | KSA | TH | TW | VN

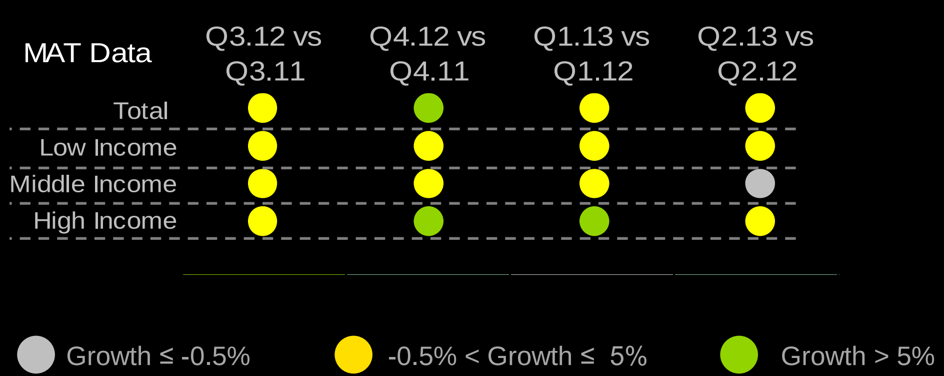
Back Homepage | Back to Summary Asia

BASKET TRENDS – %Value Change MAT Q2´13 vs. YA





%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL



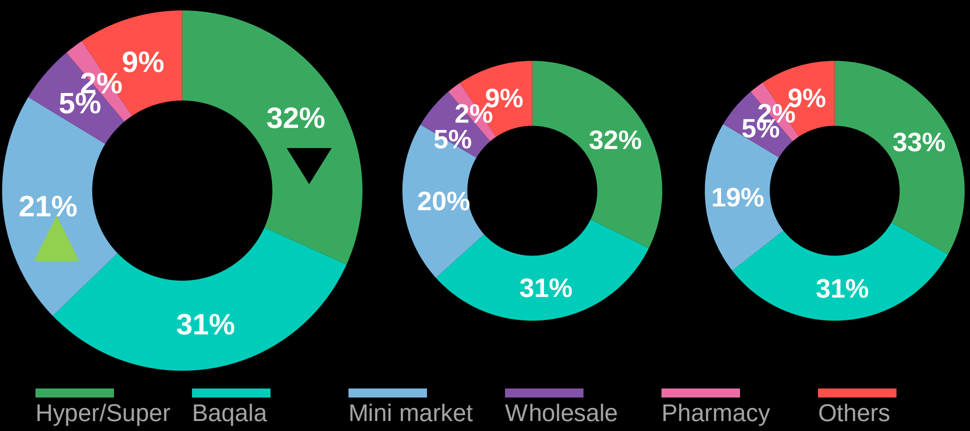
TOP 10 RECRUITERS IN PHILIPPINES (by penetration points growth)

Rank 2013	Categories	Additional Penetration points
1	DEODORANT	8.0
2	DISHWASH	5.0
3	BLEACH	5.0
4	LOTION	4.2
5	FABRIC SOFTNER	3.9
6	ICE CREAM	3.5
7	BOUILLON	3.5
8	LIQUID JUICE	3.4
9	YOGHURT	2.5
10	SOFT DRINK	2.1

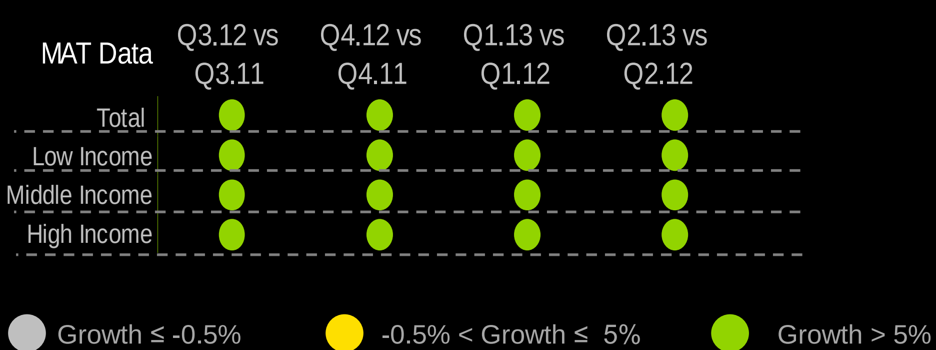
Source: MAT Q213 vs YA Category Penetration%

BASKET TRENDS – %Value Change MAT Q2.13 vs. YA

MAT Q2.13 / MAT Q1.13 / MAT Q2.12



%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

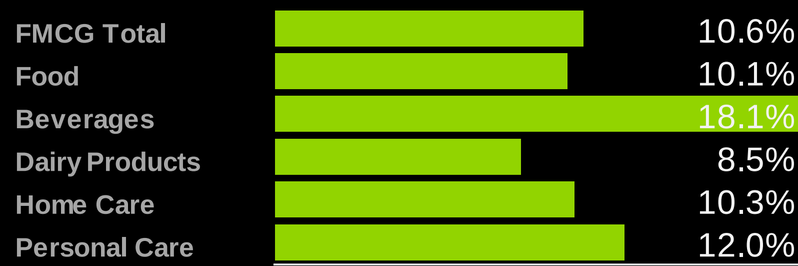


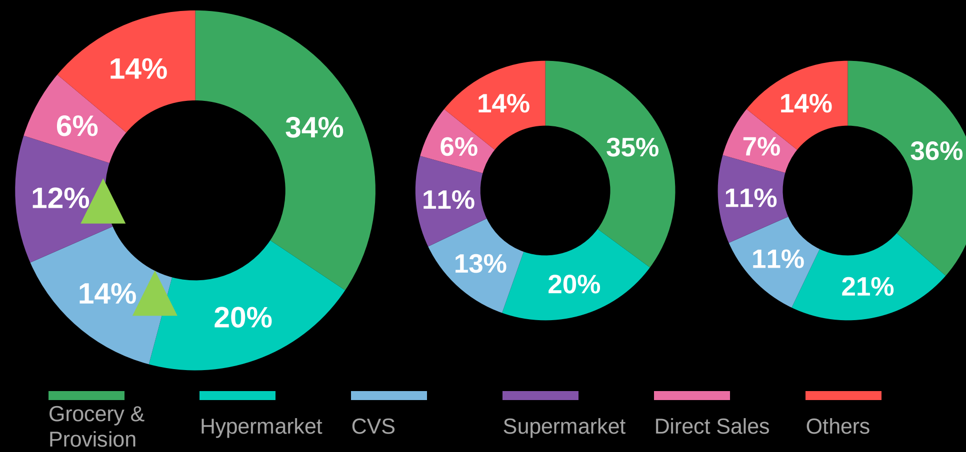
TOP RECRUITERS IN KSA (by penetration points growth)

Rank 2013	Categories	Additional Penetration points
1	AIR FRESHNER	2.1
2	CONDENSED MILK	1.2
3	JUICES	0.4
4	SANITARY NAPKINS	0.3
5	LABAN LIQUID	0.2
6	ZABADI (YOGHURT)	0.1
7	BLEACH	0.1

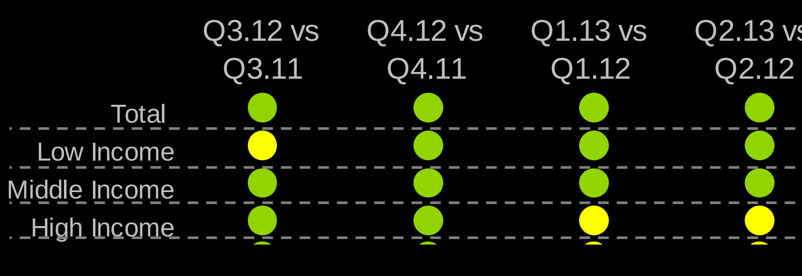
Source: MAT Q213 vs YA Category Penetration%

BASKET TRENDS – %Value Change MAT Q2´13 vs. YA





%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL



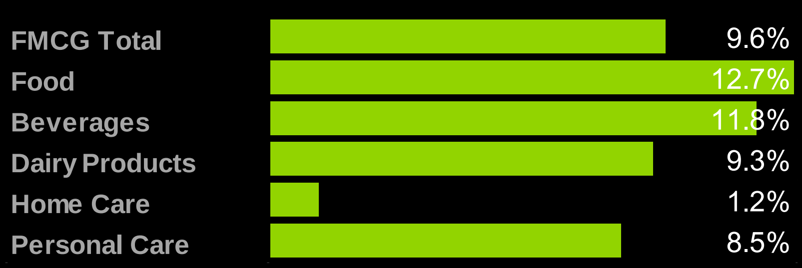
Growth ≤ -0.5%   -0.5% < Growth ≤ 5%   Growth > 5%

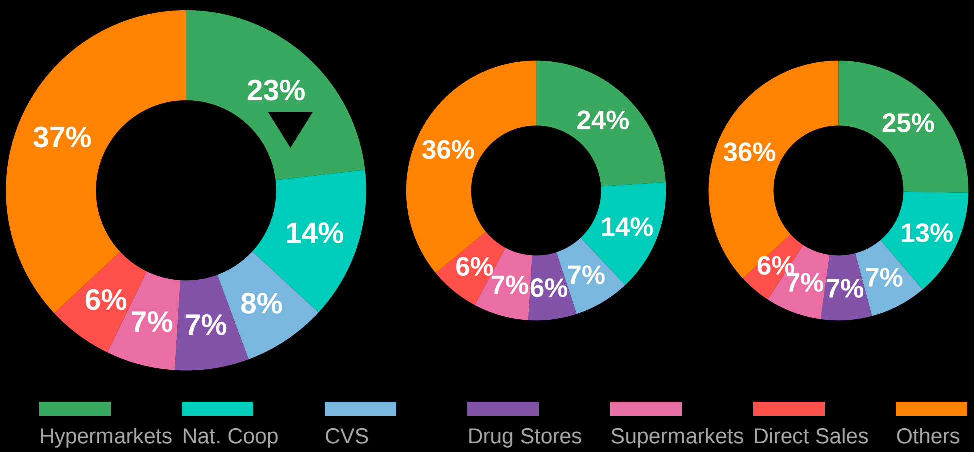
TOP 10 RECRUITERS IN THAILAND (by penetration points growth)

Rank 2013	Categories	Additional Penetration points
1	RTD TEA	9.1
2	CUP YOGHURT	6.8
3	STERILIZED LIQUID MILK	6.0
4	ESSENCE OF CHICKEN	5.2
5	ICE CREAM	5.0
6	DEODORANT	4.9
7	LIQUID SOAP	3.3
8	HAIR CONDITIONER	3.1
9	PASTEURIZED LIQUID MILK	3.0
10	LIQUID DETERGENT	3.0

Source: MAT Q213 vs YA Category Penetration%

BASKET TRENDS – %Value Change MAT Q2´13 vs. YA





%CHANGE FMCG BASKET PER SOCIAL ECONOMIC LEVEL

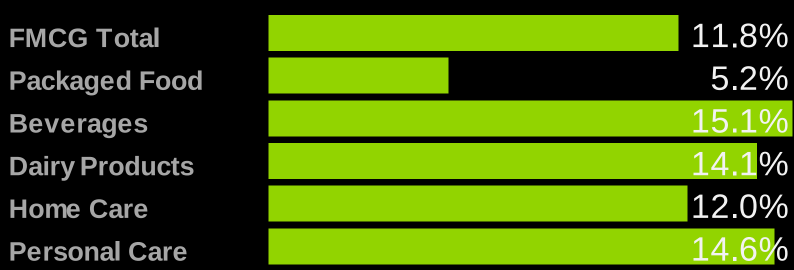
Growth ≤ -0.5% -0.5% < Growth ≤ 5% Growth > 5%

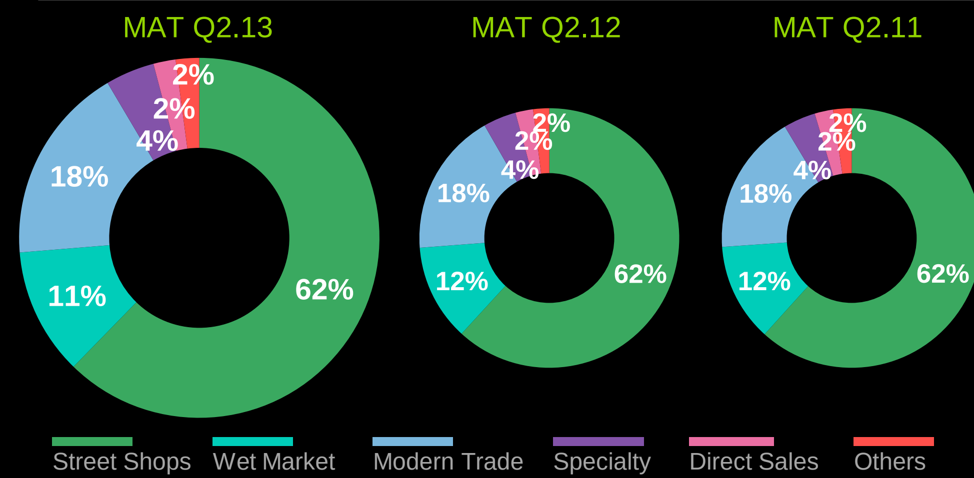
TOP 10 FMCG RECRUITERS IN TAIWAN (by penetration point growth)

Rank 2013	Categories	Additional Penetration points
1	Condiments / Seasoning	5.6
2	Essences / Bird Nest	5.2
3	Energy / Sports Drink	5.0
4	Spirits	4.7
5	Ice-cream	4.0
6	Wet Tissue	3.9
7	Coffee	3.8
8	Carbonated Soft Drink	3.5
9	Sugar Confectionery	3.4
10	Fruit / Vegetable Drink	3.4

Source: MAT Q213 vs YA Category Penetration%

BASKET TRENDS – %Value Change MAT Q2´13 vs. YA URBAN 4 CITIES





Note: Data Urban 4 cities

BASKET TRENDS – %Value Change MAT Q2´13 vs. YA RURAL

Note: Data excluding gift

TOP 10 RECRUITERS IN VIETNAM (by penetration points growth)

Rank 2013	Categories	Additional Penetration points
1	INSTANT COFFEE	5.0
2	RICE SOUP	3.5
3	BATHROOM CLEANER	3.2
4	ENERGY DRINK	2.7
5	LIQUID DETERGENT	2.7
6	KETCHUP/TOMATO SAUCE	2.6
7	FLOOR CLEANER	2.4
8	FUNCTIONAL DRINKING YOGHURT	2.3
9	BOX TISSUE	1.6
10	BOUILLON	1.6

Source: MAT Q213 vs YA Category Penetration%

ASIA | KEY INDICATORS 2013

	CN	IN	ID	KR	MY
GDP Growth in 2013	**7.8%**	**5.7%**	**6.8%**	**2.8%**	**5.1%**
2013 Inflation (CPI %)	**2.6%**	**10.0%**	**5.9%**	**2.8%**	**1.6%**
Avg. Household Spend per year on FMCG	**1,175 USD**	**228 USD**	**690 USD**	**1,590 USD**	**969 USD**
Annual Purchase frequency (FMCG)	**89 times**	**338 times**	**428 times**	**112 times**	**108 times**
Average Household Size	**2.8 members**	**4.9 members**	**3.9 members**	**2.8 members**	**4.5 members**

	PH	KSA	TW	TH	VN
GDP Growth in 2013	**6.0%**	**4.4%**	**3.0%**	**5.9%**	**5.2%**
2013 Inflation (CPI %)	**2.8%**	**3.6%**	**2.1%**	**2.3%**	**8.2%**
Avg. Household Spend per year on FMCG	**725 USD**	**2,099 USD**	**1,423 USD**	**615 USD**	**658 USD**
Annual Purchase frequency (FMCG)	**348 times**	**214 times**	**102 times**	**212 times**	**166 times**
Average Household Size	**5 members**	**3.9 members**	**2.8 members**	**3 members**	**4.6 members**

Sources: IMF, National Bureau of Statistics of China, Trading economics, India Ministry of statistics & Programme Implementation, Central Statistic Bureau Indonesia, Bank of Korea, Statistics.gov.my, Department of Statistics Malaysia, Bank Negara Malaysia, www.nscb.gov.ph, National Statistical Coordination Board, NESDB, Bank of Thailand, General Statistics Office of Vietnam, Saudi Arabian Monetary Agency, Taiwan Department of Statistics , www.imf.org

CONSUMER INSIGHTS

ASIA 2013

We are in weekly contact with your consumers across 10 countries in Asia.
We follow trends, combining a macro view with the finest details.

ConsumerInsights is our quarterly regional report.

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