



20.10.06	USD	44.03	227280	Logitech N (73)	04.09.06	CHF	60.95	2049443	5 Years To
15.09.06	CHF	61.35	2241280	Logitech N (330)	17.05.06	CHF	92.1	2049438	5 Years To
17.11.06	CHF	65.95	2160334	Nestle N (355)	07.08.06	CHF	142.9	2049441	6 Months
21.07.06	EUR	28	2158300	Nestle N (62)	15.06.06	CHF	147.8	2049445	6 Months
15.09.06	EUR	34.25	2272890	Novartis N (63)	17.05.06	CHF	176.9	2049435	6 Months
21.07.06	CHF	74.5	2160337	Novartis N (98.35)	17.05.06	CHF	45.6	2065668	ABN Am
15.09.06	CHF	17.05	2241282	Panalpina N (145)	04.09.06	EUR	23.75	2087214	ABN A
21.07.06	USD	41.5	2286725	Roche GS (150)	17.02.06	EUR	830	2176940	ABN A
20.10.06	USD	51	2158308	Roche GS (185)	07.07.06	CHF	328.5	2086066	Agri
21.07.06	CHF	52.8	2158303	Roche GS (46)	07.08.06	CHF	78.55	2087242	Alur
21.07.06	CHF	83	2272891	Royal Dutch Shell (25)	03.04.06	CHF	80.1	1837929	Bas
17.11.06	EUR	62.75	2123326	Royal Dutch Shell (860)	17.05.06	CHF	70.25	2070357	Bas
21.07.06	EUR	62.75							

FMCG MONITOR

An integrated view of Indonesia FMCG market

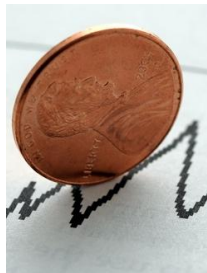


Sep
2013

executive SUMMARY

1

Indonesia's **Inflation slows to 8.40% in September**, that was down from the 8.79% increase in August. Indonesia's inflation slowed last month as pressure eased on prices for food, transportation, communications and financial services after the *Idul Fitri* holiday. During Ramadan and Idul Fitri, Indonesians usually consume more food and travel more, pushing up prices.



2

Indonesia **FMCG display a slow-down in Q3 13** and now it is deteriorating with negative volume growth (in packs) as the price per pack is increasing due to inflation effect.

However, despite the decline in total market, personal care segment still leading in both Urban and Rural with two digits growth year on year.



3

RTD Tea is the hottest category in Urban. Urban consumption of **RTD Tea surges up by +14%** in terms of average volume bought by the households.



Moreover, thanks to the additional buyers of 3 million households in Q3 2013. These could lift the total spending into 42% incremental in the same quarter versus year ago.

4

Minimarket is the top performer in both Urban and Rural.

Despite of the government policy that restrict the new store opening of minimarket, this retailer has the biggest share in modern trade and growing significantly on both Urban and Rural



KEY INDICATOR

Macro Trend

+ 8.4%

CPI

Indonesia's Inflation slows to 8.40% in September, that was down from the 8.79% increase in August

GDP

+ 5.8%

GDP increased 5.8 percent in the Q2 2013 from a year earlier

Exchange Rate

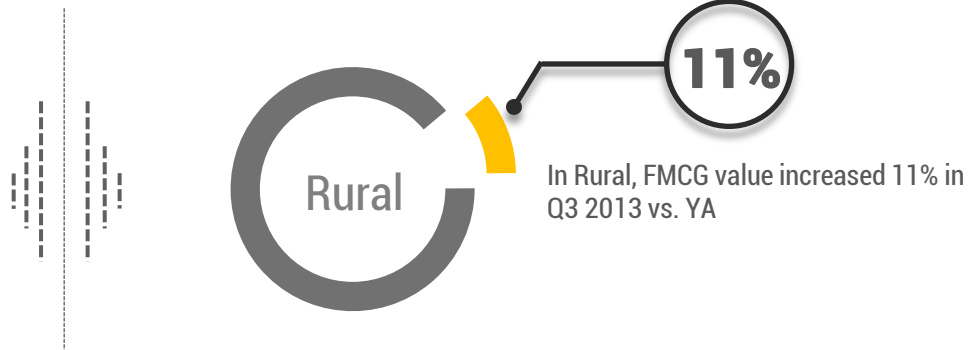
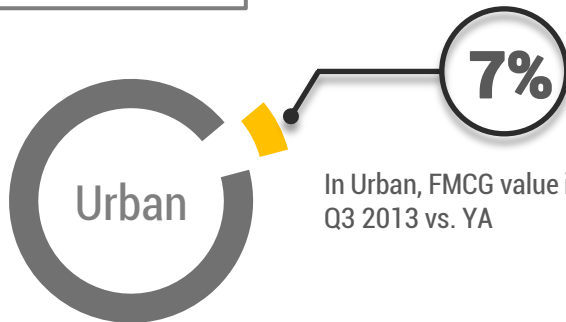
+ 21%

Rupiah exchange rate to USD increased 21% in October 2013 vs. year ago



Source : BPS and Bank Indonesia

FMCG Trend



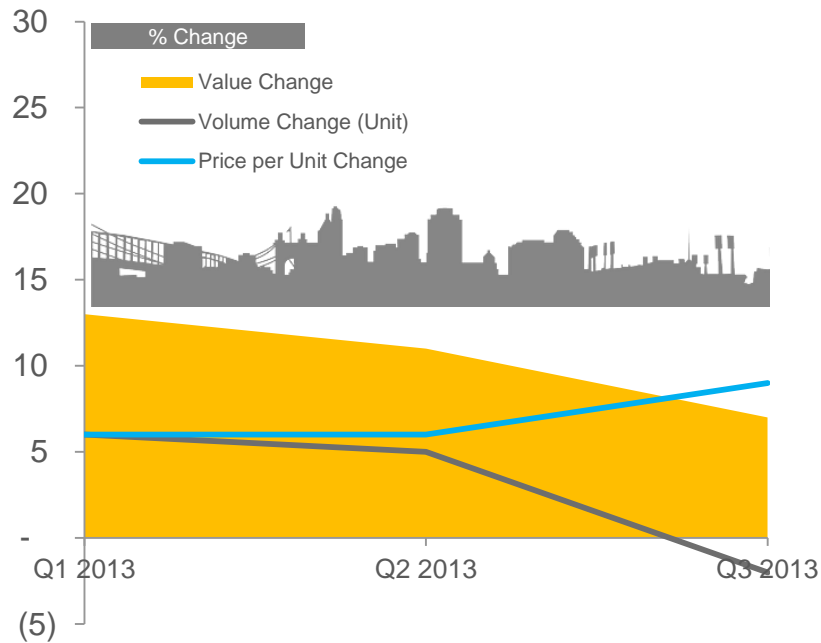
Source : Kantar Worldpanel Indonesia | Household Panel

1

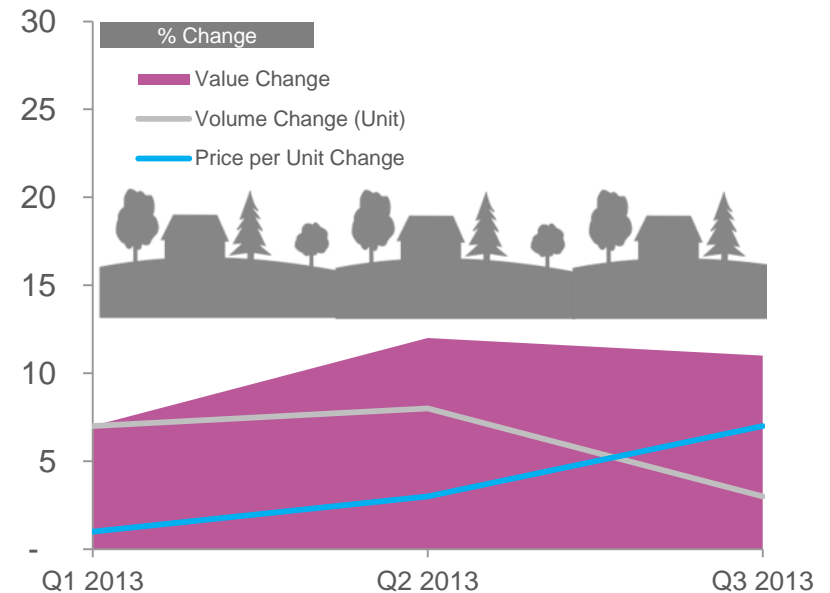
FMCG – 12 WEEKLY YEAR – ON – YEAR CHANGE (%)

Indonesia FMCG display a slow-down in Q3 13 and now it is deteriorating with negative volume growth (in packs) as the price per pack is increasing due to inflation effect.

Urban



Rural



Source : Kantar Worldpanel Indonesia – Household Panel – Total FMCG

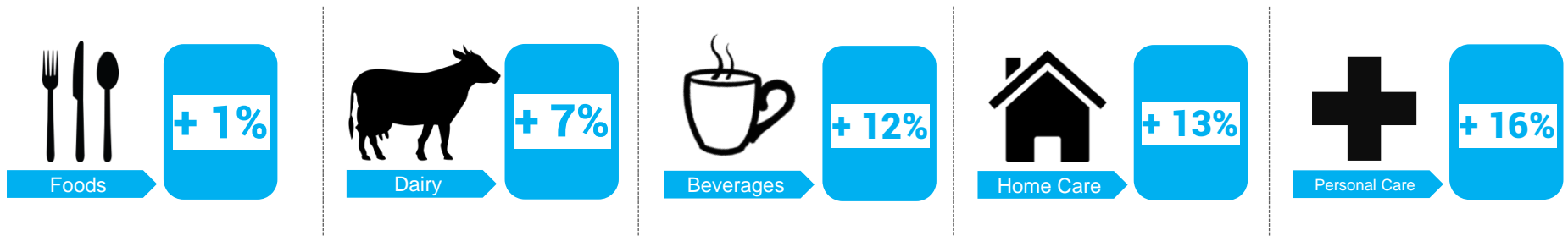
2

FMCG SEGMENTS TRENDS - VALUE CHANGE [%]

Personal Care leads the FMCG market in Urban and Rural

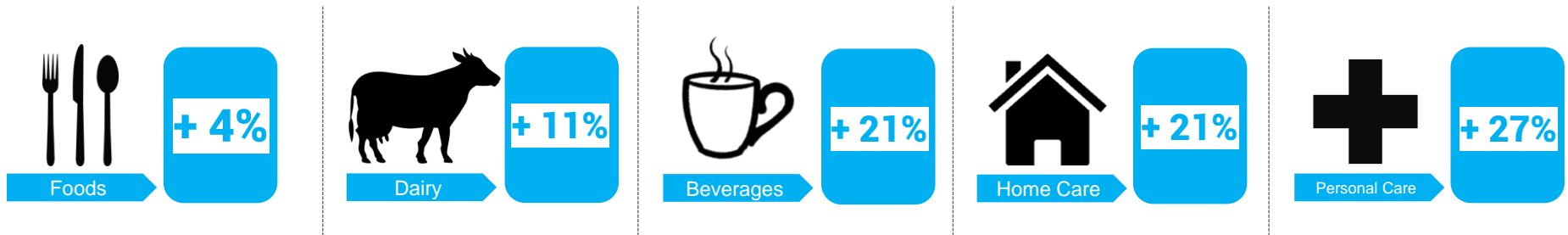
Urban

12 we P09/2013 vs. YA



Rural

12 we P09/2013 vs. YA



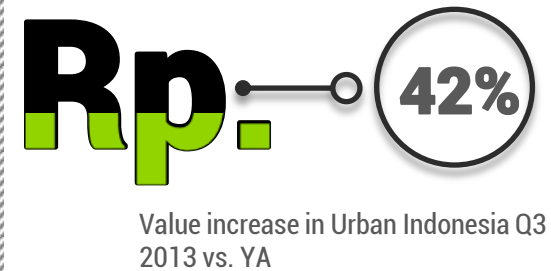
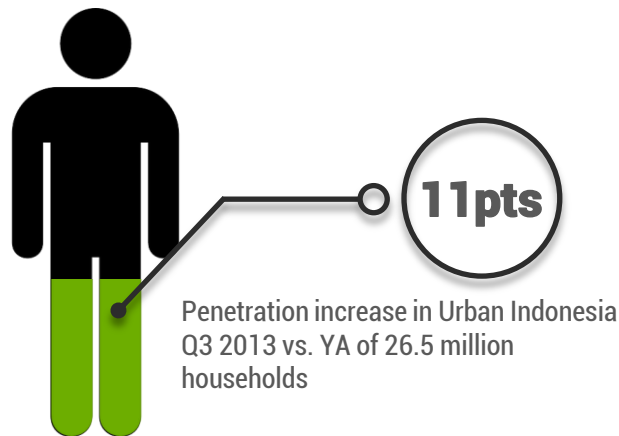
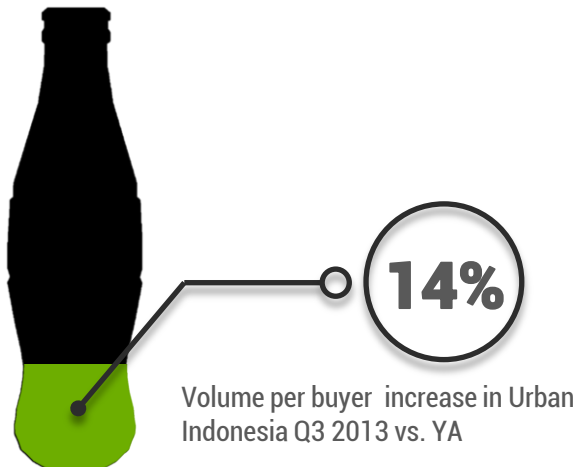
Source : Kantar Worldpanel Indonesia – Household Panel – Total FMCG

*Foods are excluding fresh food

3

HOT CATEGORIES (URBAN)

RTD Tea is growing in this “Tea Drinker Country”

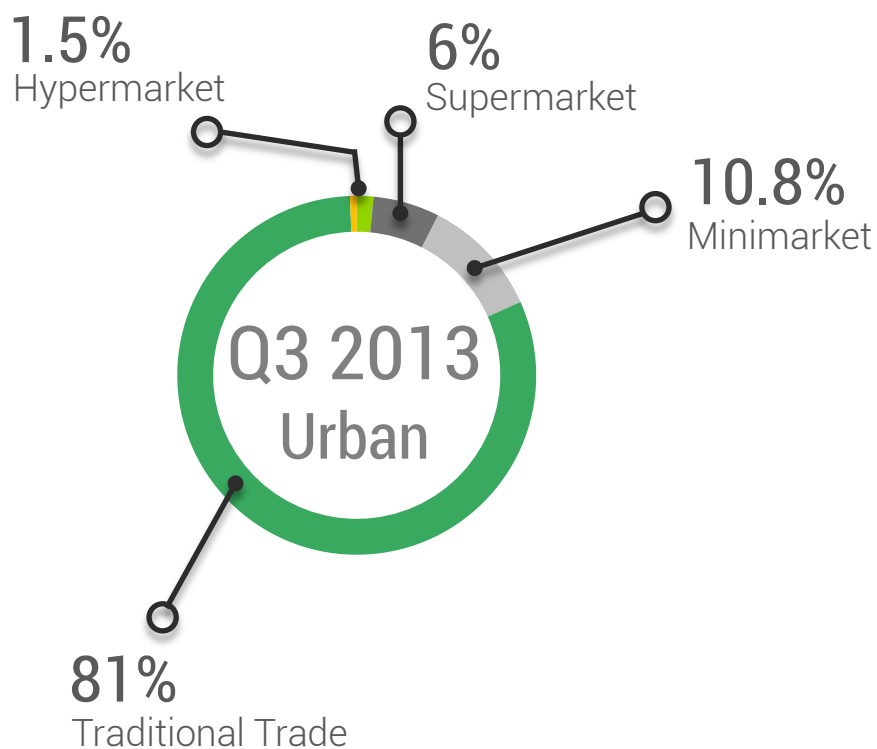




4

RETAILER

RETAILER SNAPSHOT - URBAN



Value Change %

Value Change %	Q3 2013 vs. YA
Minimarket	+ 13%
Hyper + Supermarket	+ 12%
Traditional Trade	+ 5%

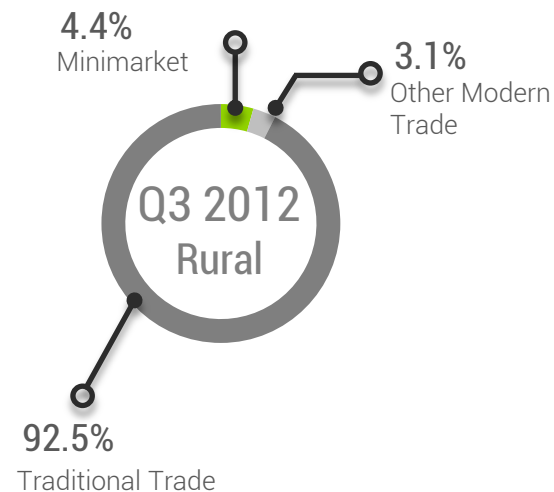
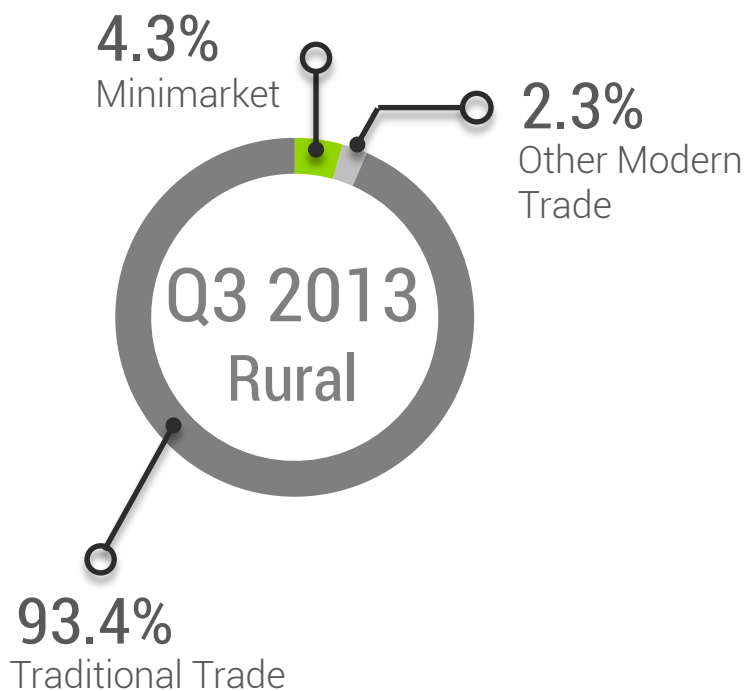
Source : Kantar Worldpanel Indonesia – Household Panel – Total FMCG



5

RETAILER

RETAILER SNAPSHOT - RURAL



Value Change %

Value Change %	Q3 2013 vs. YA
Minimarket	+ 9%
Traditional Trade	+ 12%

Source : Kantar Worldpanel Indonesia – Household Panel – Total FMCG

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.


With over 60 years' experience, a team of 3,500, and services covering more than 55 countries directly or through partners, Kantar Worldpanel delivers High Definition Inspiration™ in fields as diverse as FMCG, impulse products, fashion, baby, telecommunications and entertainment, among many others.

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

 indonesia@kantarworldpanel.com

 www.kantarworldpanel.com/id



Kantar Worldpanel Indonesia



@KWP_ID