



# FMCG MONITOR

## An integrated view of Indonesia FMCG market



Oct  
2013

#Data up to P10 2013

# executive SUMMARY

1



Indonesia's gross domestic product (GDP) **expanded 5.62 percent** in the third quarter of 2013 from year ago. The result implies the continuation of Indonesia's slowing economic growth. This is the weakest since the 2009 global recession as a declining rupiah restrained investment in Southeast Asia's largest economy.

Some factors that caused the decline were the depreciating rupiah exchange rate, the central bank's higher benchmark interest rate, and high inflation.

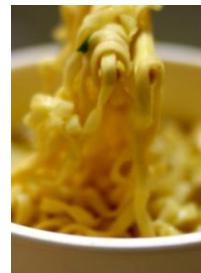
2



Indonesia's **FMCG growth keeps slowing down**, despite the positive trend by 11% growth versus last year

Personal care segment continues to lead the market in both Urban and Rural with two digits growth year on year.

3



Cup noodle shows excellent growth in Urban, especially in expanding into more consumers, with **more than 2.5 million households recruited** in the latest 3 months versus year ago.

This buyer incremental successfully lifted the total value of instant noodle by more than 50%.

4

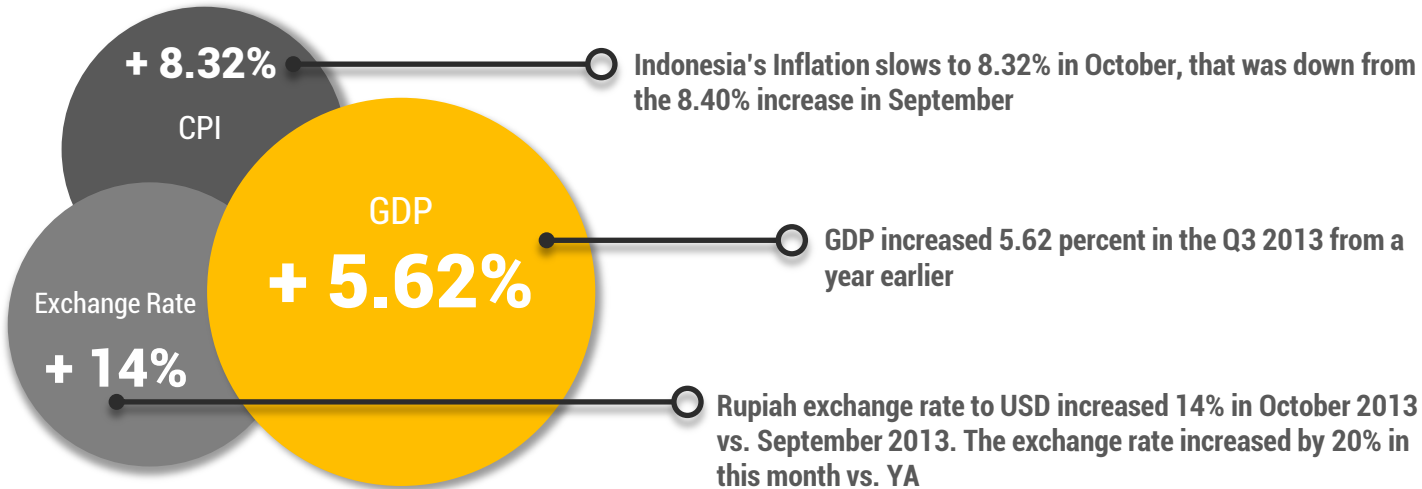


**All key channels have seen positive sign of growth** in this period. Minimarket grows by two-digits this period and even the bigger channel format like hyper-supermarket also enjoy the positive trend.

Traditional trade is also increasing in both urban and rural. Suggesting that this trade channel is still dominating the market in Indonesia.

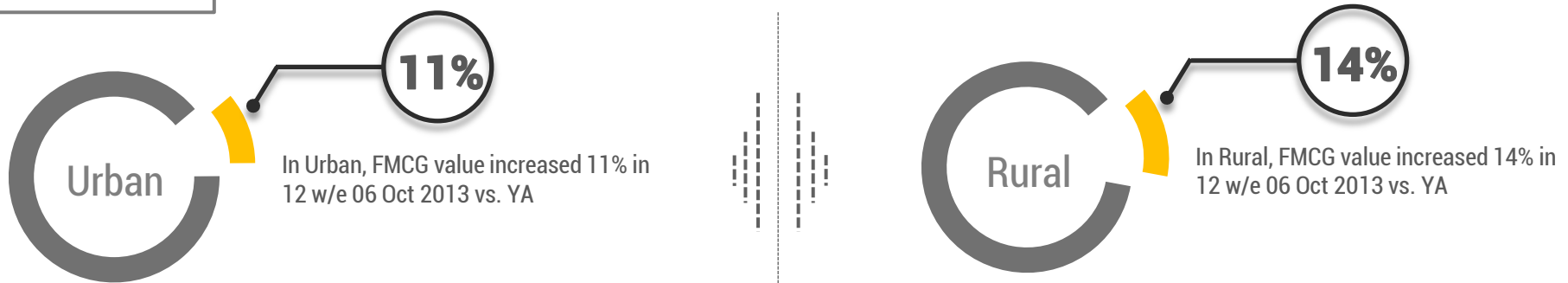
# KEY INDICATOR

## Macro Trend



Source : BPS and Bank Indonesia

## FMCG Trend



Source : Kantar Worldpanel Indonesia | Household Panel

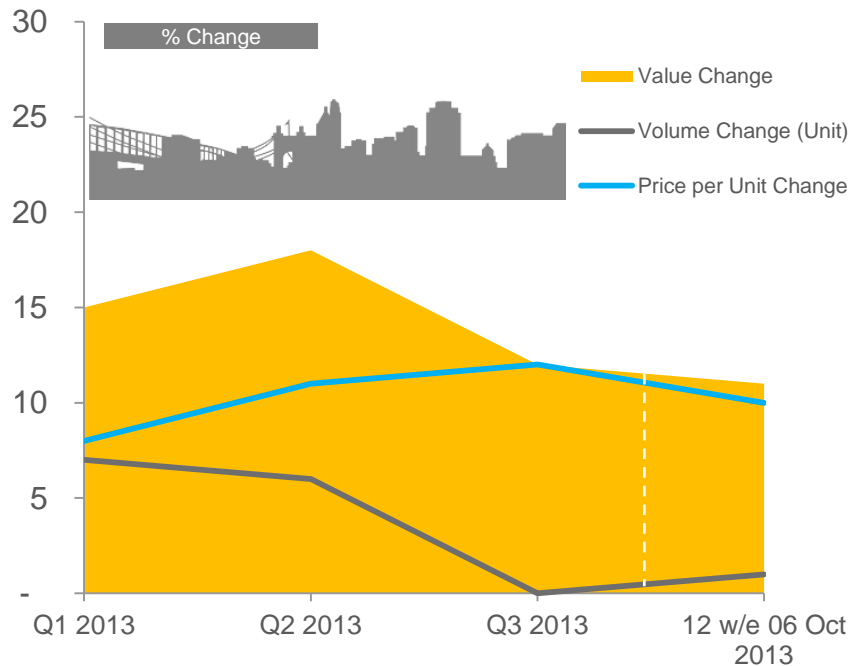
\*FMCG is excluding rice, sugar, and fresh food

# 1

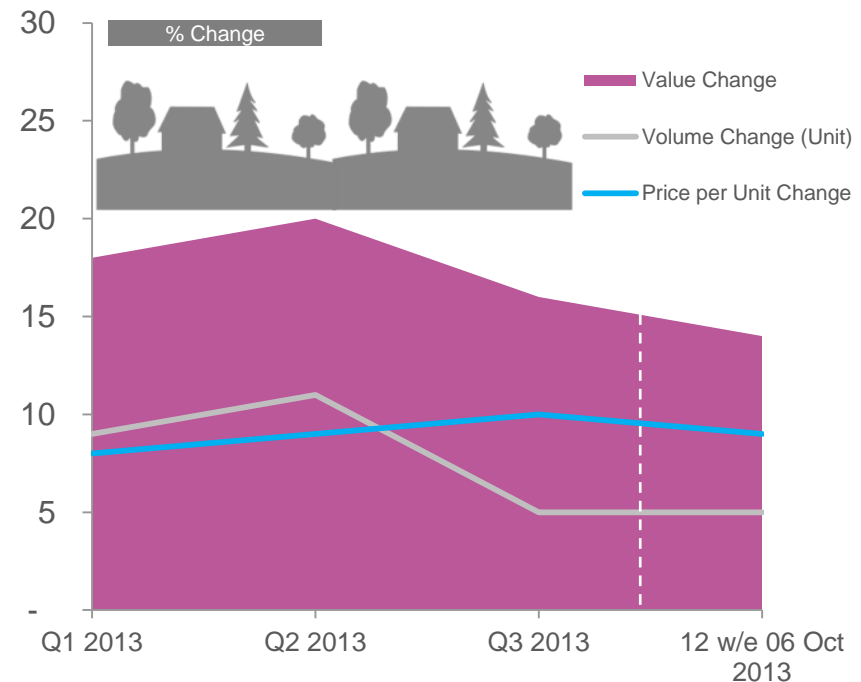
## FMCG – 12 WEEKLY YEAR – ON – YEAR CHANGE (%)

Indonesia's FMCG growth keeps slowing down, despite the positive trend by 11% growth versus last year

### Urban



### Rural



Source : Kantar Worldpanel Indonesia – Household Panel – Total FMCG

\*FMCG is excluding rice, sugar, and fresh food

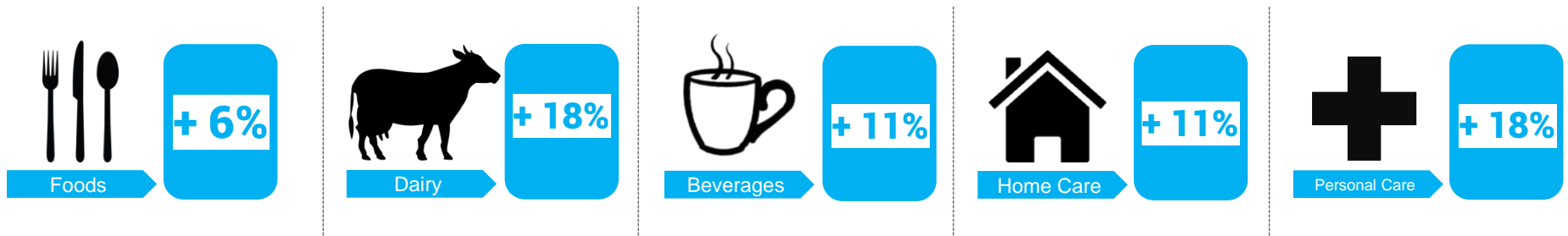
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## FMCG SEGMENTS TRENDS - VALUE CHANGE [%]

### Personal Care leads the FMCG market in Urban and Rural

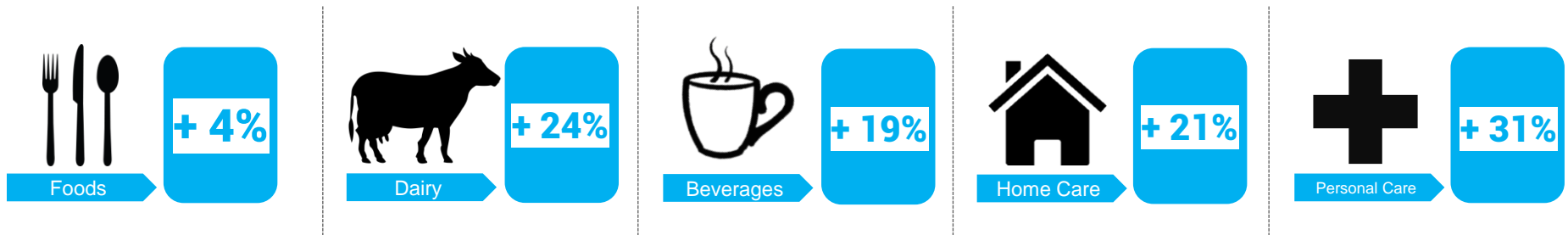
#### Urban

12 we 06 Oct 2013 vs. YA



#### Rural

12 we 06 Oct 2013 vs. YA



Source : Kantar Worldpanel Indonesia – Household Panel – Total FMCG

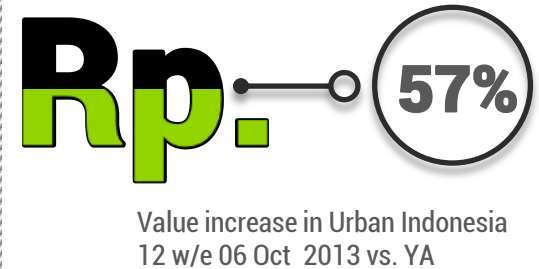
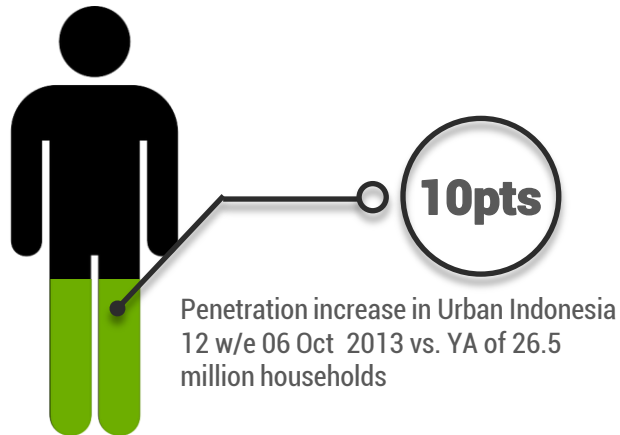
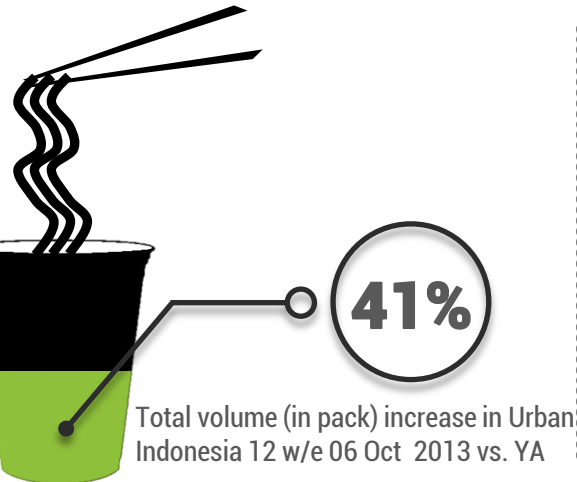
\*Foods are excluding rice, sugar, and fresh food

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## HOT CATEGORIES (URBAN)

Cup noodle shows excellent growth in Urban, especially in expanding into more consumers, with more than 2.5 million households recruited in the latest 3 months versus year ago

### Instant Cup Noodle

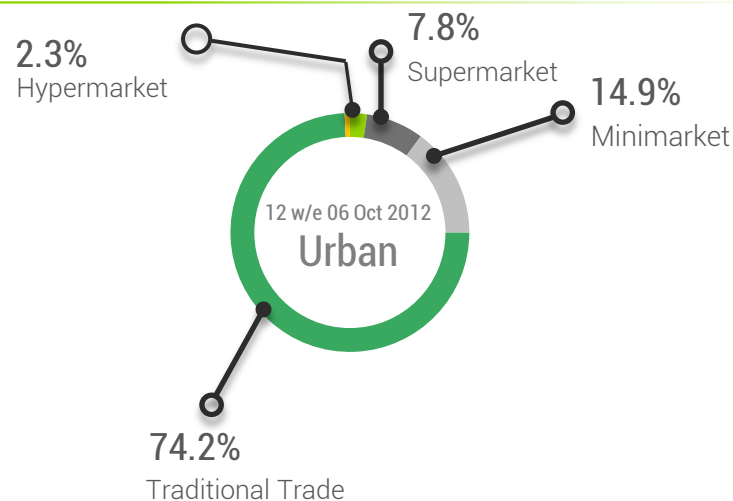
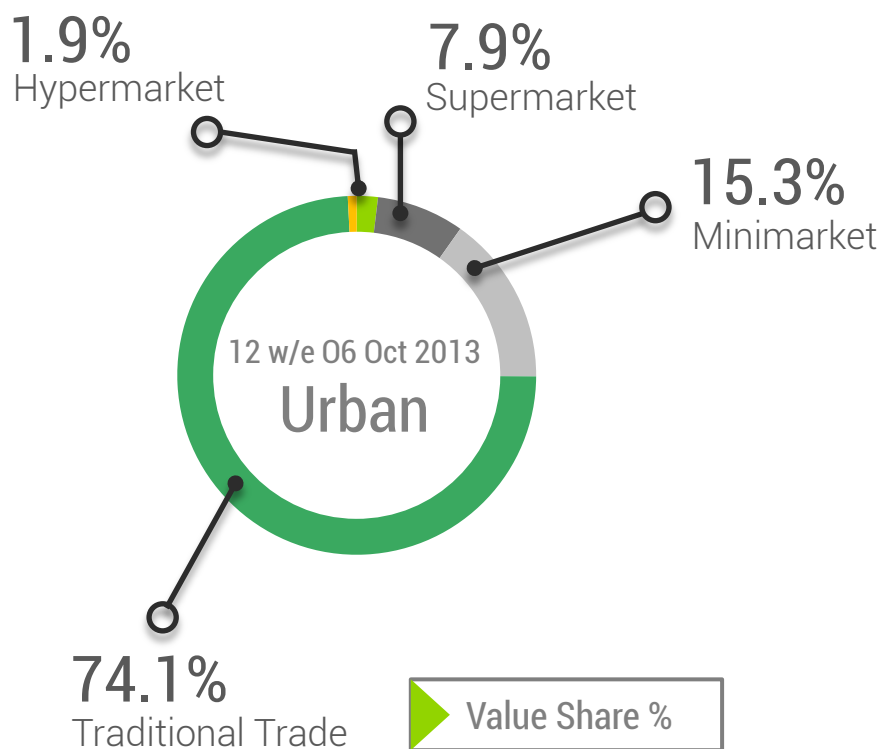




# 4

RETAILER

## RETAILER SNAPSHOT - URBAN



### Value Change %

Value Change %	12 w/e 06 Oct 2013 vs. YA
Minimarket	+ 14%
Hyper + Supermarket	+ 7%
Traditional Trade	+ 11%

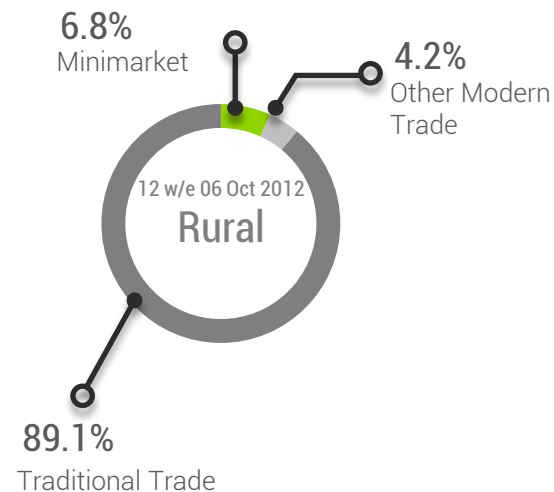
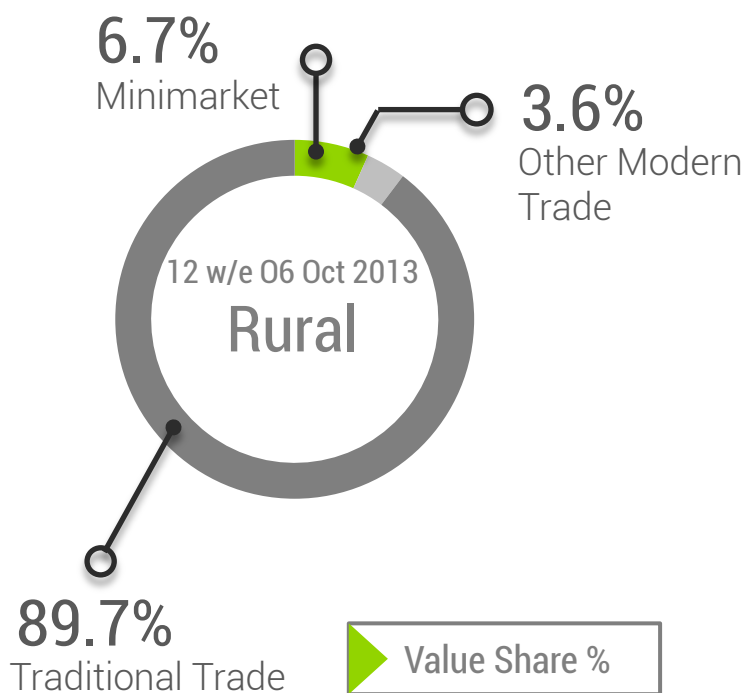
Source : Kantar Worldpanel Indonesia – Household Panel – Total FMCG



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RETAILER

# RETAILER SNAPSHOT - RURAL



Value Change %

Value Change %	Q3 2013 vs. YA
Minimarket	+ 13%
Traditional Trade	+ 15%

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.

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](http://www.kantarworldpanel.com/id)

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