

FMCG Promotion Review (Pen Mal)

Jan- Dec 2022 vs 2021

By Intrack Market Services



Notes of MailerTrack Information

1



Price information is based on Published Promotion Price in mailer/newspaper/In-Store poster*/ social media / digital media and not everyday shelf pricing

2



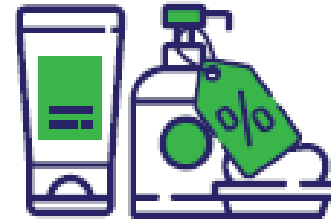
MT review number represents number of promotion features (occurrence) done by each category/ retailer/ supplier in Mailer, Newspaper, In-store (CVS & Petrol Marts), Social Media & Digital Media

3



Exclude Regional Data (Mailer/ Newspaper only for particular Region/ Outlet)

4



Include Range Discount & Buy X Free Y Promotions

10 years of market promotions information in Pen Mal

2023 Newly Added Retailer – Careon Pharmacy

Mailer, Newspaper, Social Media, Digital Media Tracking



PETROL MART



In Store Tracking



Promotion in MailerTrack 2.0 break down into 3 different types:

Normal Promo



MILO
2kg Softpack

RM30.88
/each



HORLICK
3 In 1 10 x 28g - 30g
(Assorted)

RM10.88
/each



F&N
High Calcium Sweetener
Creamer 500g

RM2.78
/each

Where the promotion advertised with **one product description and one price**

Range Promo



Where promotion **comes with a range** that is in percentage discount/ in price discount range


Buy X Free Y



Where there are **no prices advertised** for the product, and it's only bought a product get another product for free

Social media tracking for promotions from retailers' official accounts on Facebook and Instagram, as well as their own mobile apps, began in 2020

Facebook Post

 **Watsons** tagged products from their shop.
23 December 2022 at 12:31 · 🌐

[BUY 1 FREE 1]
Don't torture yourself just by window shopping, #KakiWatsons! 🙄
Feed yourself with this GREAT DEALS* including BUY 1 FREE 1* and savings up to 50% OFF* on healthcare products TODAY when you shop at #WatsonsMalaysia STORES & ONLINE! 🛒👉
<https://bit.ly/3WGmpmE>

💬 Chat with licensed doctors for consultations and e-prescriptions or pharmacists for general health enquiries via Watsons Virtual Health Consultation! 📄👉 <https://bit.ly/VirtualHealthConsultation>

🏆 Win... See more



Facebook Mailer

 **Lotus's Malaysia**
1 d · 🌐

*Tahun baru, tawaran baru! Yahuu...banyaknya promosi menarik sempena Tahun Baru Cina ni. Jadi, cepat dapatkan barang-barang keperluan perayaan di Lotus's! Nak singgah Lotus's boleh, beli secara dalam talian pun boleh. Jom Sama-Sama Huat dengan kami!

Promosi terbaik di sini:
<https://bit.ly/LotussMYCatalogue>
Mudah dan cepat berbelanja... See more



Video Post

 **7-Eleven Malaysia**
1 d · 🌐

[PROMO] Looking to munch and gulp to your heart's content this festive season? Then don't sleep on these 1,2,3 deals cause there's a lot more in store!

#7ElevenMalaysia #Team7E #Everything123



**Will use Facebook as the based, if there's different ads in Instagram / Mobile Apps
We will also include it in*

*If there's hardcopies of the promotions, it will only be tracked under Mailer
There would not be a case of duplication between Mailer / Digital Media source

Digital media consists of promotions from retailers that only provide e-catalogues on their official websites or QR codes in outlets. Prior to 2022, these promotions were tracked as 'mailer' source type

Retailer Website

Promotions & Events

ALL STORES



Star Rewards

Share



Back to School

Until 8th January 2023


Share



#AEONResponsible Bag

Starting from 1st January 2023


Share



Weekend Best Buy


Until 8th January 2023

Share



PET Drinking Bottle Recycling Campaign

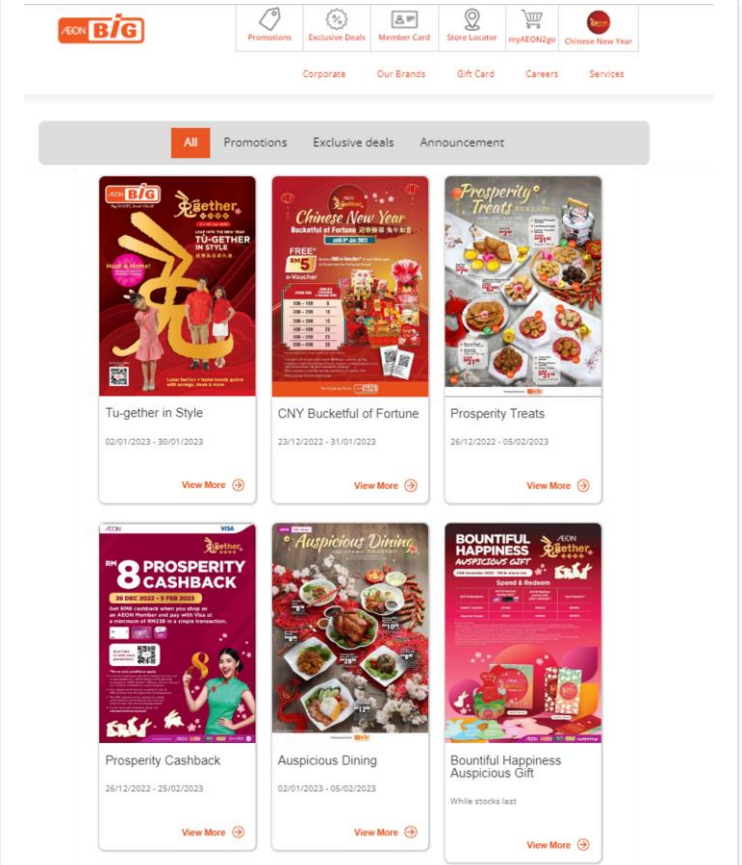
Share



AEON Customer's Voice

Share

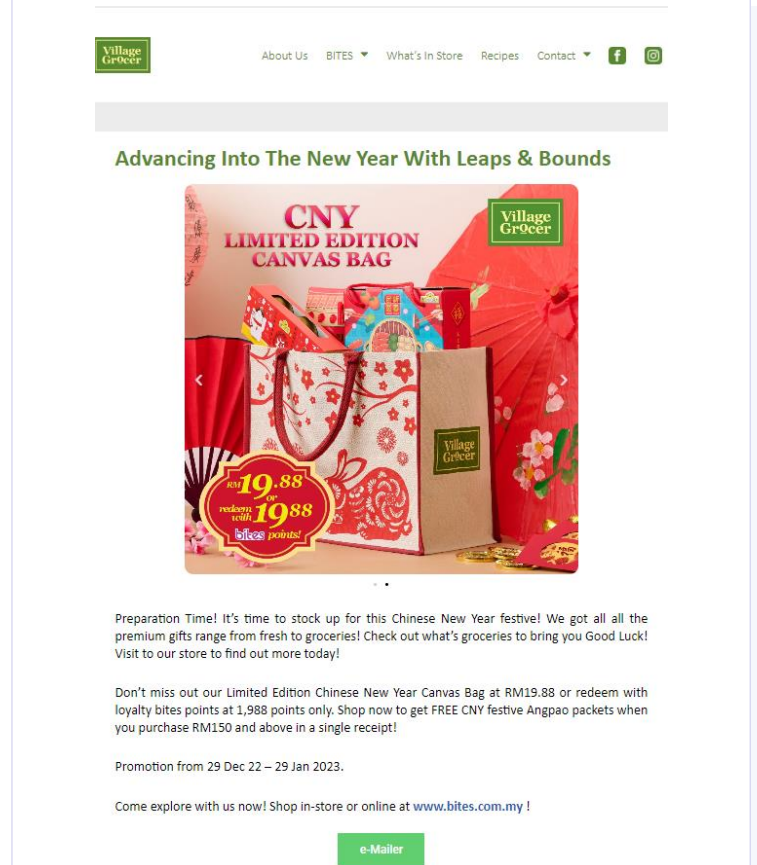
E-Catalogue



The interface shows a navigation bar with 'Promotions', 'Exclusive Deals', 'Member Card', 'Store Locator', 'myAEONgo', and 'Chinese New Year'. Below this is a sub-navigation bar with 'All', 'Promotions', 'Exclusive deals', and 'Announcement'. The main content area displays a grid of promotional cards:

- Tu-gether in Style**: 02/01/2023 - 30/01/2023
- CNY Bucketful of Fortune**: 23/12/2022 - 31/01/2023
- Prosperity Treats**: 26/12/2022 - 05/02/2023
- Prosperity Cashback**: 26/12/2022 - 25/02/2023
- Auspicious Dining**: 02/01/2023 - 05/02/2023
- Bountiful Happiness Auspicious Gift**: While stocks last

E-Catalogue



The interface shows a navigation bar with 'About Us', 'BITES', 'What's In Store', 'Recipes', and 'Contact'. The main content area features a large promotional banner for 'Advancing Into The New Year With Leaps & Bounds' featuring 'CNY LIMITED EDITION CANVAS BAG' for RM19.88 or redeemable with 1,988 points. Below the banner is a paragraph of text:

Preparation Time! It's time to stock up for this Chinese New Year festival! We got all the premium gifts range from fresh to groceries! Check out what's groceries to bring you Good Luck! Visit to our store to find out more today!

Don't miss out our Limited Edition Chinese New Year Canvas Bag at RM19.88 or redeem with loyalty bites points at 1,988 points only. Shop now to get FREE CNY festive Angpao packets when you purchase RM150 and above in a single receipt!

Promotion from 29 Dec 22 – 29 Jan 2023.

Come explore with us now! Shop in-store or online at www.bites.com.my!

[e-Mailer](#)

Contents

- 1) Evolution of Advertised Promotion (Mailer, Newspaper, In-Store, Social Media & Digital Media)
- 2) Importance of House Brand
- 3) Price Competitiveness

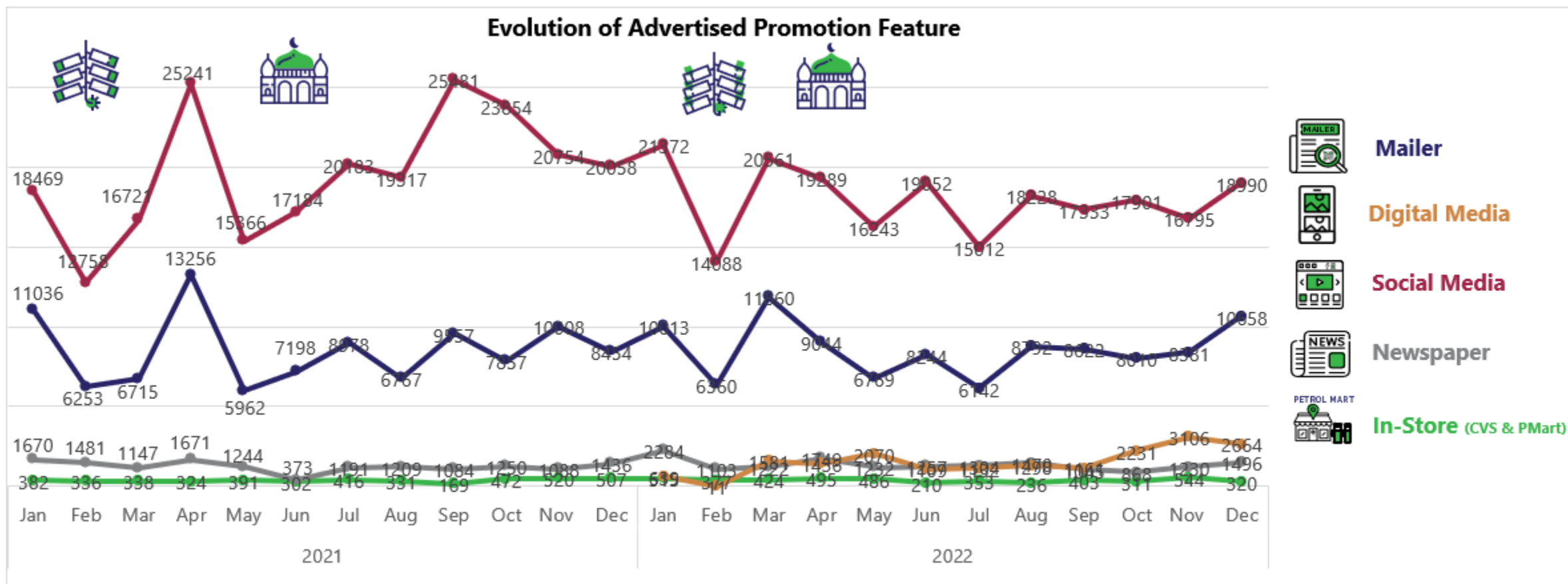
Source: MailerTrack - All channels, excluding regional promotion, Jan-Dec 2022 vs 2021

The newly added digital media source type contributed to 5% of total promotions and had similar promotion share as newspaper in 2022. In addition, 95% of this promotion was seen for normal promotion and the remaining 5% for Range Promo and Buy X Free Y.

Only social media noted a decline by 9% compared to YAG, however it still had the largest share by 60% of all sources tracked.

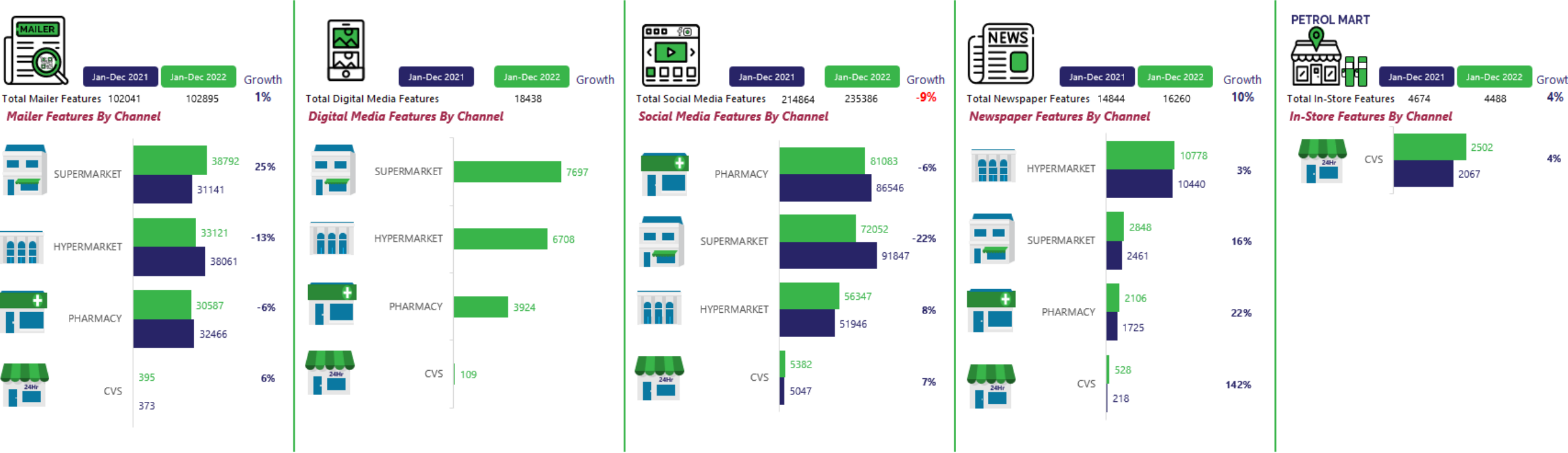
Promotion Share	Icon	TOTAL PROMO FEATURES			NORMAL PROMO			RANGE PROMO			BUY X FREE Y		
		Jan-Dec 2021	Jan-Dec 2022	Growth	Jan-Dec 2021	Jan-Dec 2022	Growth	Jan-Dec 2021	Jan-Dec 2022	Growth	Jan-Dec 2021	Jan-Dec 2022	Growth
29%		102041	102895	1%	95327	94029	-1%	6487	8661	34%	227	205	-10%
5%			18438			17452			973			13	
60%		235386	214864	-9%	208758	184131	-12%	25554	29875	17%	1074	858	-20%
5%		14844	16260	10%	13771	14716	7%	1031	1532	49%	42	12	-71%
1%		4488	4674	4%	4345	4286	-1%	39	206	428%	104	182	75%

Total digital media features in Q4-22 nearly doubled compared to the previous quarter as retailers and suppliers started to increase their promotion in this source while other promotion sources remained constant in this quarter. Meanwhile, mailer and social media promotion peaked in Jan22 but dropped sharply in Feb22 before rebounds in Mar22 due to festive season. Mailer and social media promotions also saw an increase in Dec22 as CNY festive fall in Jan23.



78% of digital media promotion was spotted from hypermarket and supermarket. In addition, Aeon Group (Aeon Big, Aeon, Aeon Wellness and MaxValu) contributed 58% in this overall promotion sources.

Decline by 9% in total social media was mainly due to decrease from supermarket by 22% vs YAG. Local supermarkets such as Billion, Pantai Timor, TMG Mart, Pasaraya Big and Segi Fresh noted to have reduce their social media promotion in 2022.



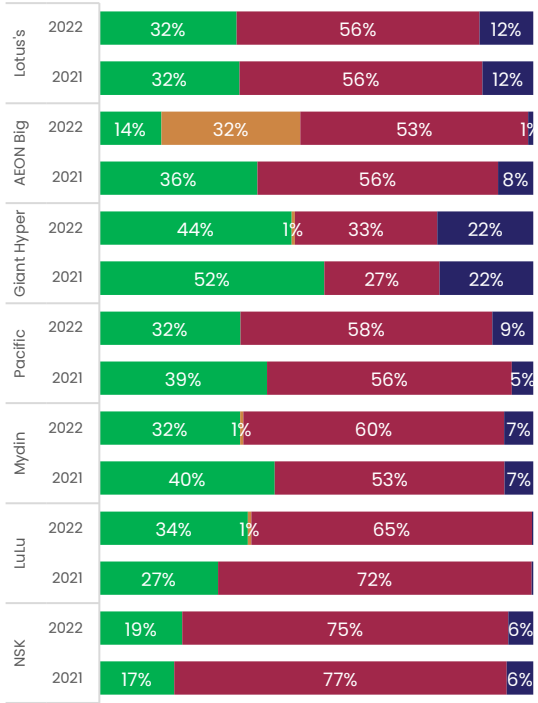
Source: MailerTrack Jan-Dec 2022 vs 2021, Mailer, Newspaper, In Store, Social Media & Digital Media Excluding Regional Data

Beside the Aeon Group, more retailers have adapted digitalization. Giant, Mydin, Lulu, BIG, Cold Storage, Village Grocer, Watsons, Alpro Pharmacy, Constant Pharmacy, and Giant Mini have started to promote through digital media.

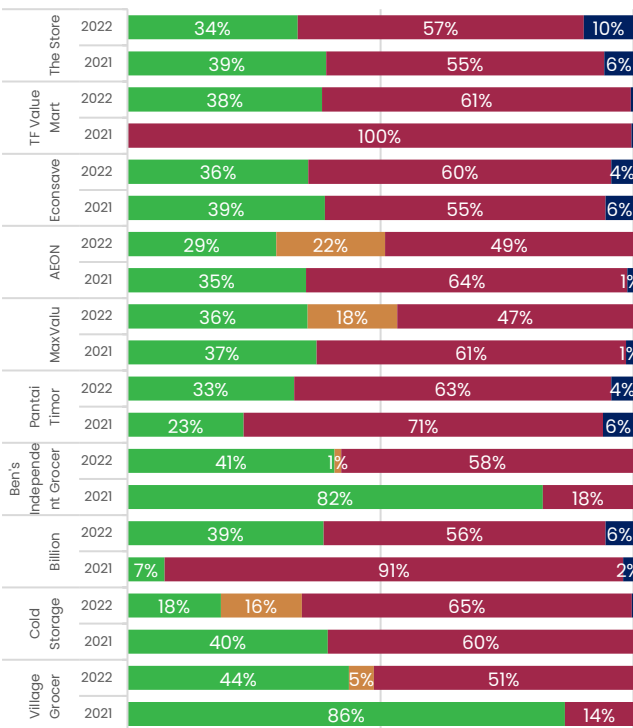
Some of the top retailers such as Lotus's, Giant, Mydin, NSK, The Store, Pacific and Caring have either maintained or increased their newspaper share, leading to a 10% growth for this source in 2022.



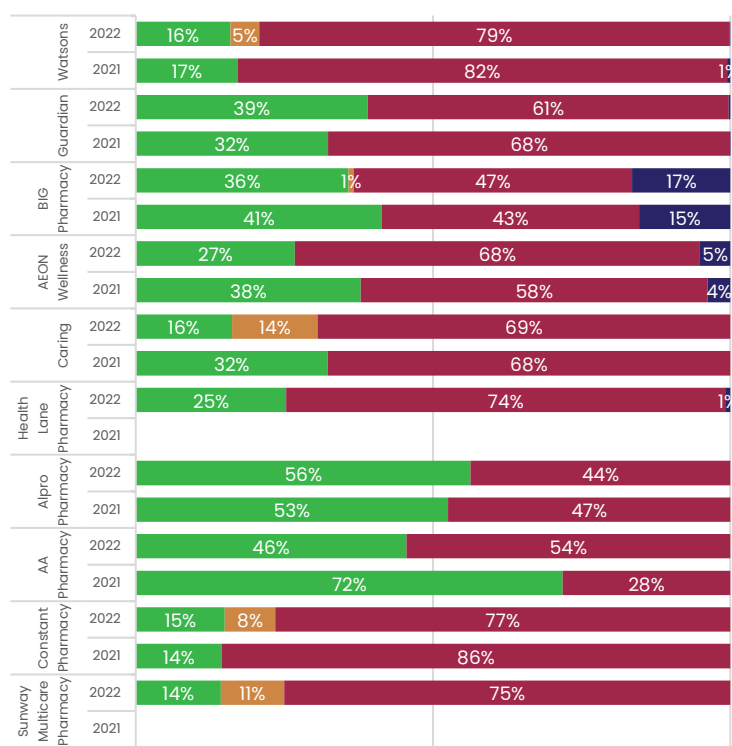
Hypermarket



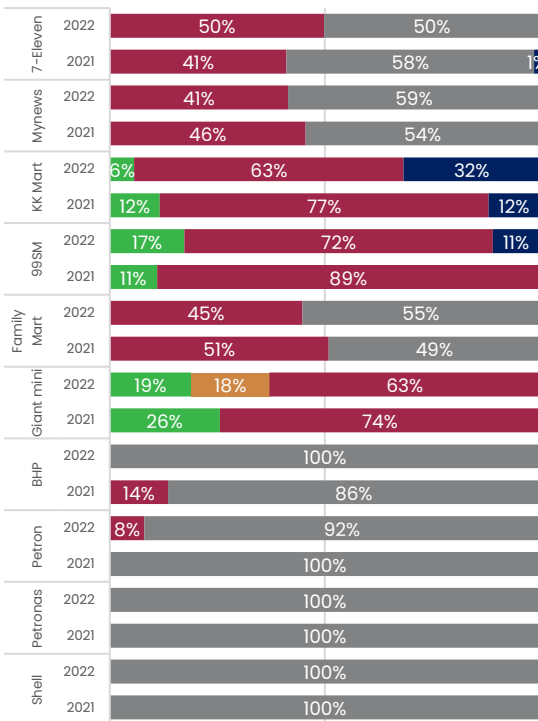
Supermarket



Pharmacy

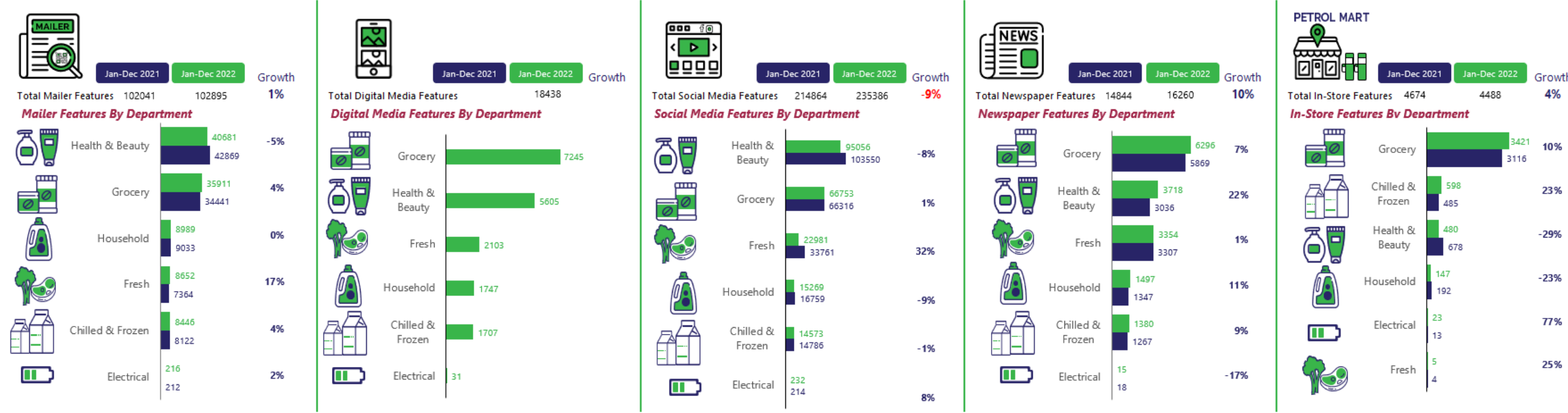


CVS/PETROL MART



Grocery was the most featured department in digital media and other tracked sources beside mailer and social media.

Health & Beauty was the most promoted department in mailer and social media sources, but this department saw a decline by 5% and 8% respectively in both sources due to decrease of promotion from pharmacy channel.

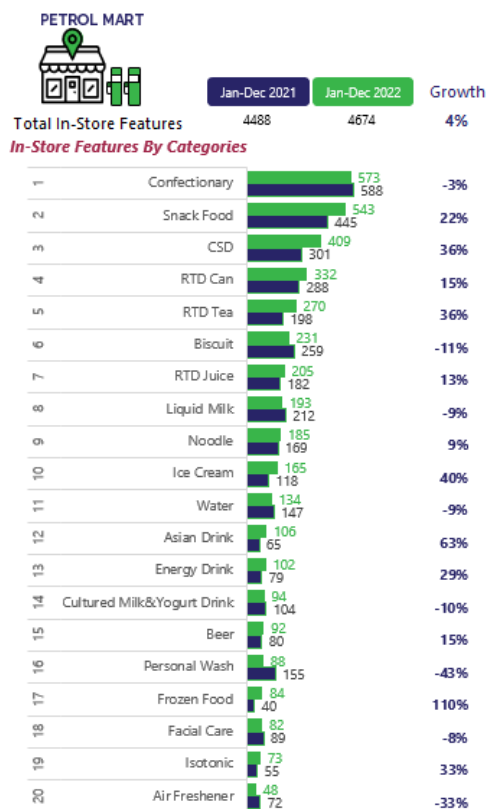
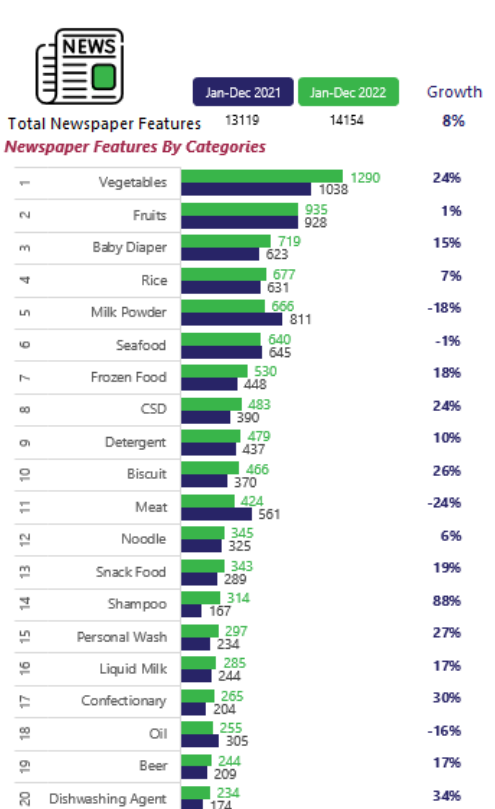
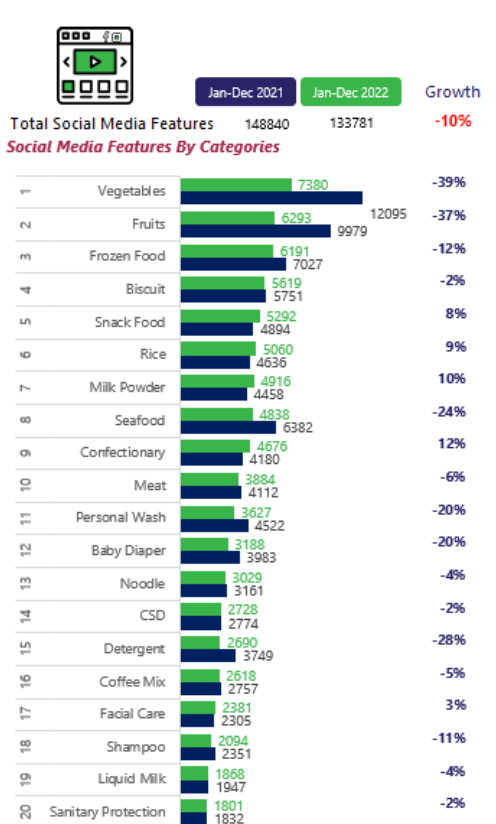
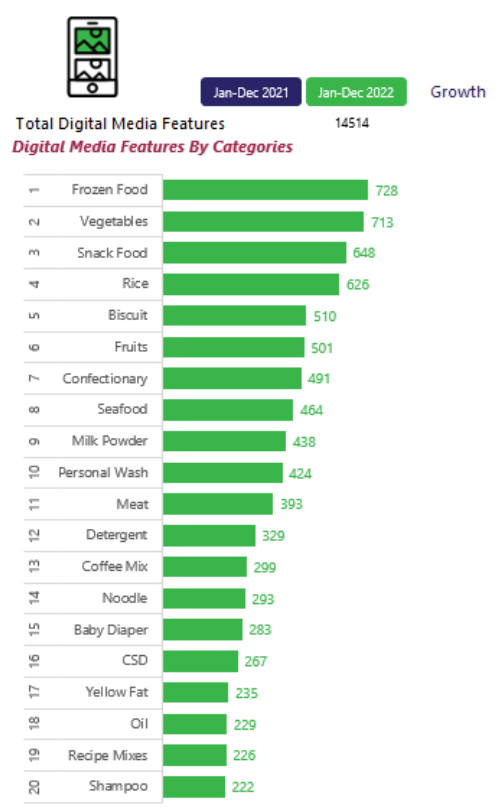
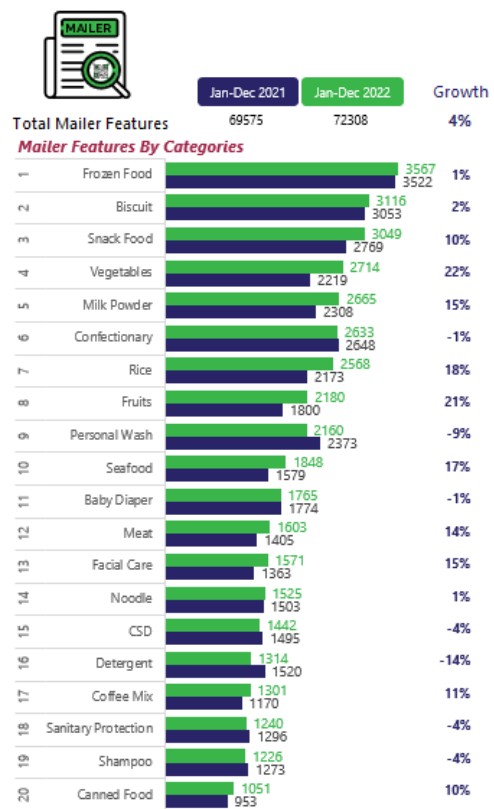


Source: MailerTrack Jan-Dec 2022 vs 2021, Mailer, Newspaper, In Store, Social Media & Digital Media Excluding Regional Data

All Top 3 categories in social media promotions decreased which led to decline by 10% for social media promotions. Fresh produce such as Vegetables and Fruits promotions were more focused in mailer, digital media and newspaper.

Aside from Fresh produce, Biscuit was the most promoted categories in 2022, with total of 9942 features spotted in all promotion sources and noted 5% increase vs YAG.

Promotion Features by Source by Categories [Hypermarket, Supermarket, CVS & Petrol Mart]

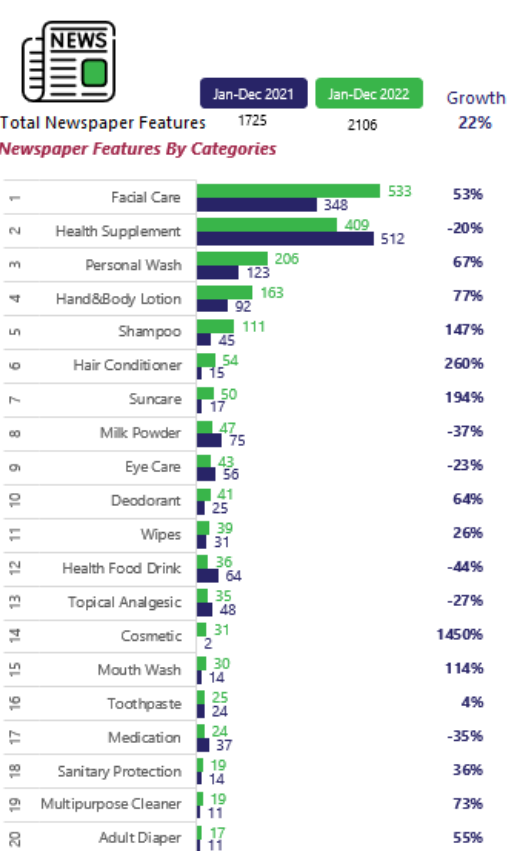
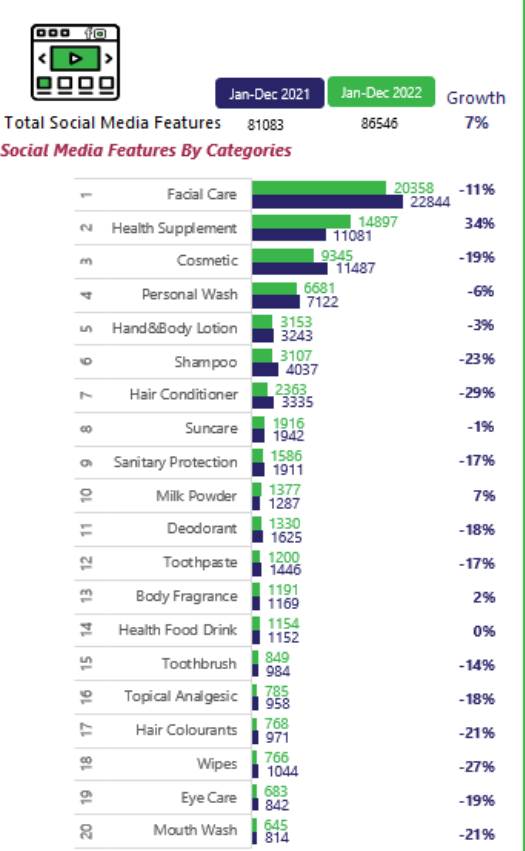
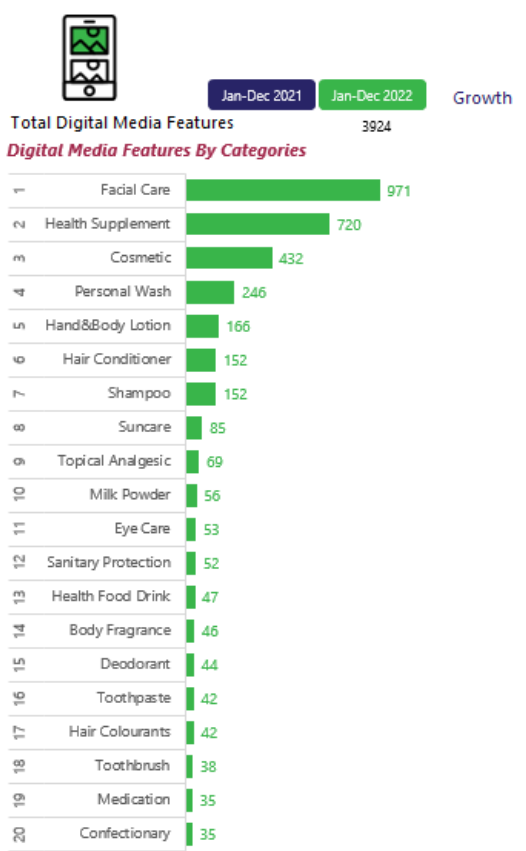
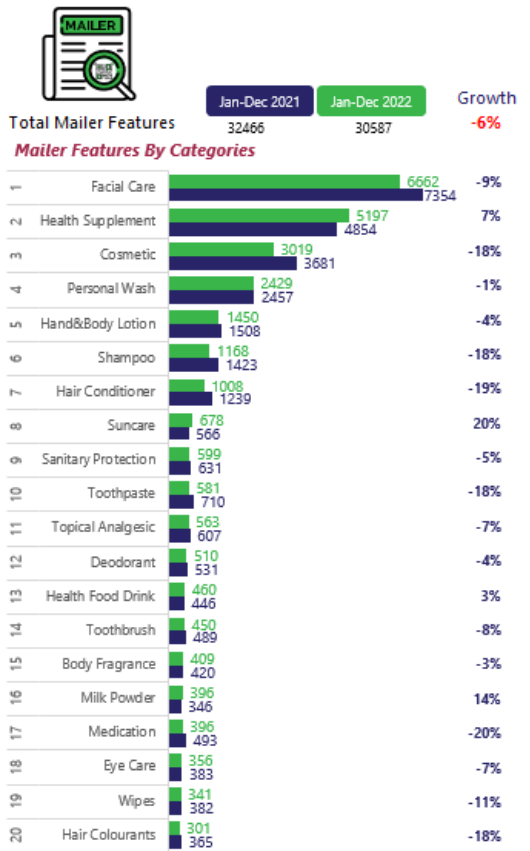


Source: MailerTrack Jan-Dec 2022 vs 2021, Mailer, Newspaper, In Store, Social Media & Digital Media Excluding Regional Data

As for pharmacy, Facial Care maintain as the leading category in all promotion sources. Despite this, features in mailer and social media for this category have decline due to decreased of promotions by Watsons and Guardian.

Health Supplement features increased in all mediums except for newspaper promotion, mainly due to some suppliers such as Watsons (House Brand), Zuellig Pharma, CCM Pharma and Herbalceutical Pharma reduce in press ads features.

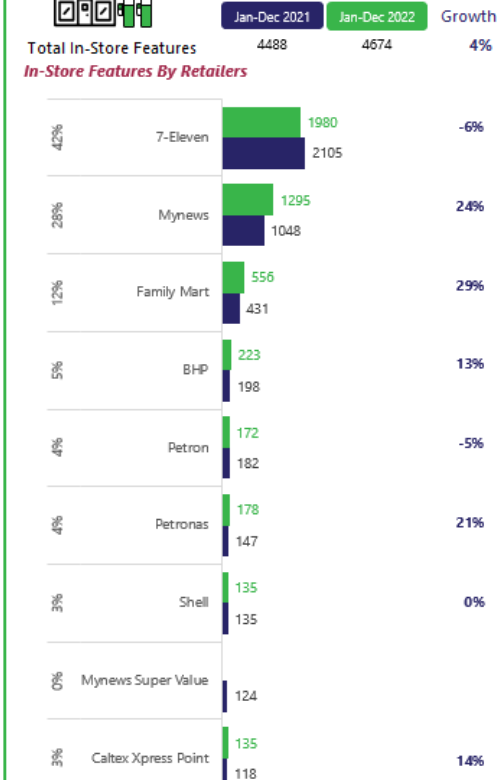
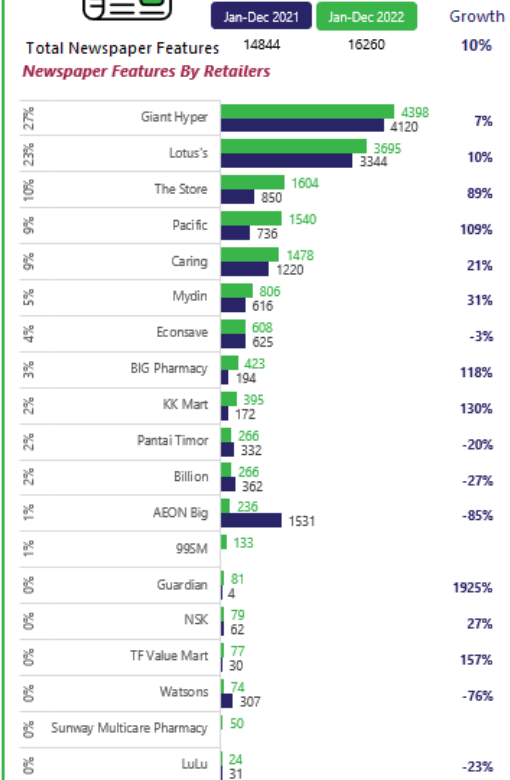
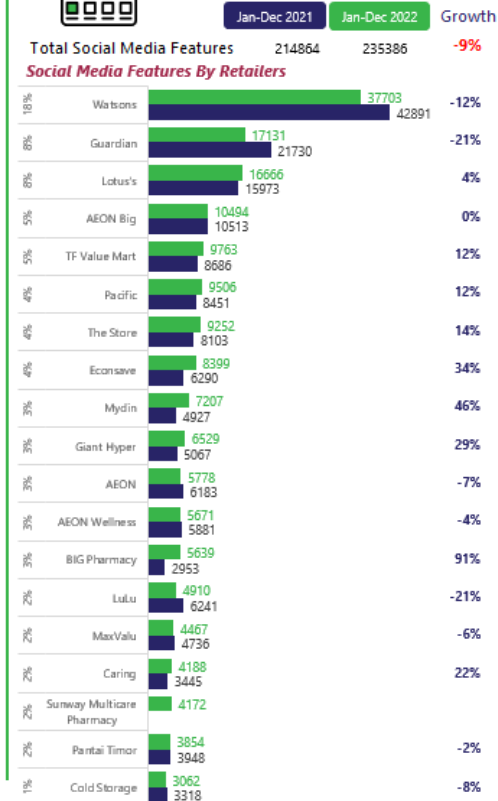
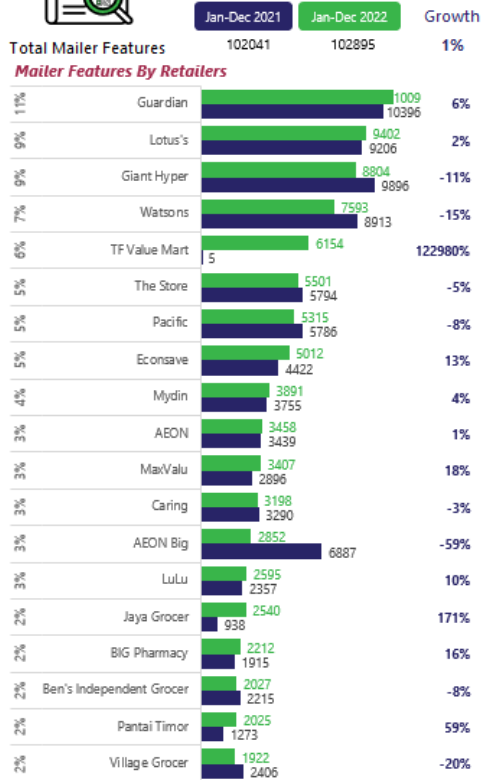
Promotion Features by Source by Categories [Pharmacies]



Source: MailerTrack Jan-Dec 2022 vs 2021, Mailer, Newspaper, In Store, Social Media & Digital Media Excluding Regional Data

Digital Media promotion which dominated by Aeon Group was mainly contributed by Aeon Big, who nearly tripled in number of features compared to AEON and MaxValu. Despite that, their mailer and newspaper promotion have decline by more than 50% vs YAG.

TF Value Mart who promoting back their physical mailer in 2022 ranked among Top 5 promoting retailer in mailer promotions; Meanwhile, among Top 10 retailers in social media, only Watsons and Guardian have reduced their social media promotion by 12% and 21% respectively.



Source: MailerTrack Jan-Dec 2022 vs 2021, Mailer, Newspaper, In Store, Social Media & Digital Media Excluding Regional Data

Mailer and digital media issued by Aeon Big increased by 82% in 2022 but ave. number of features decline compared to 2021

Mydin is the only Top retailer that consistent in promoting Electrical department in each quarter

Average Mailer & Digital Media Features [Hyper]



No. of Mailer & Digital Media Issued

Average No. Of Feature Per Mailer & Digital Media

	2021				2022				2021				2022				2021				2022				2021				2022											
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4				
No. of Mailer & Digital Media Issued	15	13	14	13	20	13	13	13	15	20	19	16	16	20	15	20	20	23	41	50	45	52	56	91	4	4	4	3	4	4	6	9								
Average No. Of Feature Per Mailer & Digital Media	147	186	156	185	139	176	162	172	146	125	138	161	162	108	141	105	66	69	42	45	45	43	38	31	232	209	237	348	261	236	191	94								
Grocery	65	81	65	82	61	77	66	75	73	64	71	82	83	54	71	59	32	32	17	16	18	19	17	15	88	79	78	148	110	92	68	38								
Household	18	21	22	15	17	13	15	14	15	13	19	20	15	12	17	15	10	12	8	7	7	6	6	4	34	32	34	38	44	34	34	18								
Health & Beauty	32	35	36	47	25	39	44	36	35	29	32	37	34	27	35	15	11	13	9	12	9	9	7	5	69	67	86	107	69	66	63	23								
Chilled & Frozen	12	32	14	20	15	22	15	20	17	15	11	16	23	9	14	10	7	6	4	4	4	4	4	3	18	16	16	26	21	20	13	8								
Fresh	19	17	18	21	18	24	21	26	6	4	5	6	8	5	4	6	6	5	4	5	7	5	4	4	23	15	22	29	17	22	12	6								
Electrical	1				3			1	1	1			1			1									1	1	3	1	1	1	2									



Similar like Aeon Big, AEON's number of mailer and digital media issued increased in 2022 but average number of features reduced

Billion did not have any national mailers or digital media issued in Q3-22; instead, they more focused on regional promotions in this quarter

Average Mailer & Digital Media Features [Super]



No. of Mailer & Digital Media Issued

Average No. Of Feature Per Mailer & Digital Media

	2021				2022				2021				2022				2021				2022											
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4				
No. of Mailer & Digital Media Issued	6	5	7	7	7	7	8	7	1				2	7	6	8	16	13	22	22	22	36	46	48	3	1	1	2	2	1		2
Average No. Of Feature Per Mailer & Digital Media	192	174	179	164	190	171	165	166	5				299	286	291	226	59	75	25	44	72	29	29	42	161	469	7	188	255	529		418
Grocery	81	79	76	75	86	81	77	81	3				158	149	145	114	30	36	10	19	36	14	11	18	64	214	7	65	116	233		171
Household	27	24	18	20	22	19	18	18					29	36	35	26	7	11	4	6	7	2	3	4	29	84		38	37	88		72
Health & Beauty	36	32	39	26	34	31	29	24	1				63	54	62	44	8	13	4	8	12	3	3	6	39	105		57	66	132		113
Chilled & Frozen	20		18	19	20	17	18	18	1				29	26	27	21	7	9	4	5	8	4	4	5	26	57		25	33	68		53
Fresh	27	20	26	22	26	22	22	24					21	21	23	21	7	7	3	6	9	7	8	10	4	9		4	4	8		8
Electrical	2	1	1	2	2	1	1	1						1																		2

Ave. number of mailer and digital media promotion issued by Top pharmacies maintained in 2022 vs 2021

Aeon Wellness only spotted promoting Grocery, Household and Health & Beauty products in their mailer booklets and digital media promotions

Average Mailer & Digital Media Features [Hyper]



	2021				2022				2021				2022				2021				2022											
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4				
No. of Mailer & Digital Media Issued	3	3	4	2	4	4	3	3	4	4	5	2	4	3	3	4	2	2	1	2	2	4	4	2	4	3	4	2	4	3	2	3
Average No. Of Feature Per Mailer & Digital Media	783	779	643	828	577	761	747	770	621	846	534	931	801	759	573	952	385	439	614	515	357	211	213	434	223	274	159	228	198	200	165	260
Grocery	36	30	26	39	28	37	28	40	22	32	17	29	35	34	23	37	43	63	69	64	36	23	24	35	5	3	11	8	16	17	14	
Household	30	34	24	40	24	31	29	36	3	6	8	14	17	15	16	19	5	10	17	15	13	6	6	13	3	4	4	4	5	6	5	3
Health & Beauty	717	714	593	748	524	692	691	692	595	805	507	885	750	708	533	895	335	365	526	435	308	181	183	387	215	267	152	213	185	178	143	243
Chilled & Frozen					1		1		1	1	1		1				1			1												
Fresh	1																															
Electrical			1						1	2	1	3	1		1		2	2	2	2	1	1	1									

Fresh in Watsons: Mushroom; Chilled & Frozen in Pharmacies: Cheese, RTD Juice, Pasteurised Milk, RTD Juice & Yogurt

Lotus, Giant & Aeon Big had more than 100 social media issued per quarter in FY 2022. Meanwhile, number of social media issued by Mydin saw an increase by 78% vs YAG.

In Q4-22, ave. no. of features per social media for Giant increased significantly; Grocery maintained as the Top promoted department by all Top retailers

Average Social Media Features [Hyper]



	2021				2022				2021				2022				2021				2022				2021				2022			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
No. of Social Media Issued	111	106	128	131	161	133	185	133	111	107	114	132	155	138	118	130	99	93	120	157	131	139	138	104	31	37	52	57	97	73	89	56
Average No. Of Feature Per Social Media	29	38	33	35	26	30	23	31	13	12	10	9	9	8	7	25	28	26	21	18	17	18	19	30	37	33	19	28	21	21	25	26
Grocery	13	17	15	16	12	14	10	14	5	6	5	5	4	4	3	13	13	12	9	7	8	9	9	13	17	13	6	13	9	8	9	11
Household	3	4	4	3	3	2	2	3	2	1	1	1	1	1	1	3	4	4	4	3	3	3	3	5	4	5	2	2	3	2	4	4
Health & Beauty	4	6	6	7	4	5	5	6	3	2	2	1	1	1	1	3	3	4	4	4	3	4	4	6	7	10	6	6	6	6	8	6
Chilled & Frozen	2	6	3	4	3	4	2	3	1	1	1	1	1	1	1	3	3	3	2	2	1	1	2	3	3	2	1	2	2	2	2	2
Fresh	6	6	5	5	5	5	4	6	2	2	2	2	2	2	2	3	5	4	2	2	2	2	2	3	6	3	2	4	2	3	2	3
Electrical																																

Ave. number of social media features for Billion increased in Q4-22 resulting in an increase in the number of features across all categories

Average Social Media Features [Super]



	2021				2022				2021				2022				2021				2022				2021				2022			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
No. of Social Media Issued	44	42	34	44	50	64	75	68	26	33	28	30	41	31	40	35	68	67	74	86	80	99	92	102	41	34	246	353	38	27	17	5
Average No. Of Feature Per Social Media	37	31	52	36	43	32	29	30	90	57	79	76	72	82	55	59	26	30	15	16	15	16	16	16	33	32	23	24	19	39	21	116
Grocery	16	14	21	16	19	15	14	15	42	31	41	40	34	40	26	29	14	14	5	6	6	7	5	6	12	13	7	7	7	17	10	56
Household	5	4	5	4	5	3	3	3	9	6	8	7	7	10	6	6	3	3	2	2	1	1	1	1	6	6	3	4	3	6	2	16
Health & Beauty	7	6	11	6	8	5	5	4	19	10	18	14	12	15	12	10	3	4	2	2	1	2	2	2	7	7	4	4	2	7	3	26
Chilled & Frozen	4	3	6	4	5	3	3	3	8	5	6	7	7	7	4	5	3	3	2	2	2	2	2	2	4	3	2	2	2	5	2	15
Fresh	6	4	8	6	7	5	4	5	11	6	6	8	11	11	7	8	4	5	3	5	5	4	5	4	4	3	7	8	5	4	2	4
Electrical																																1

All Top pharmacies were promoting Household and Grocery products except for Watsons, which only promoted Health and Beauty. Despite this, Watsons had the highest number of social media issued throughout all quarters compared to the other Top pharmacies.

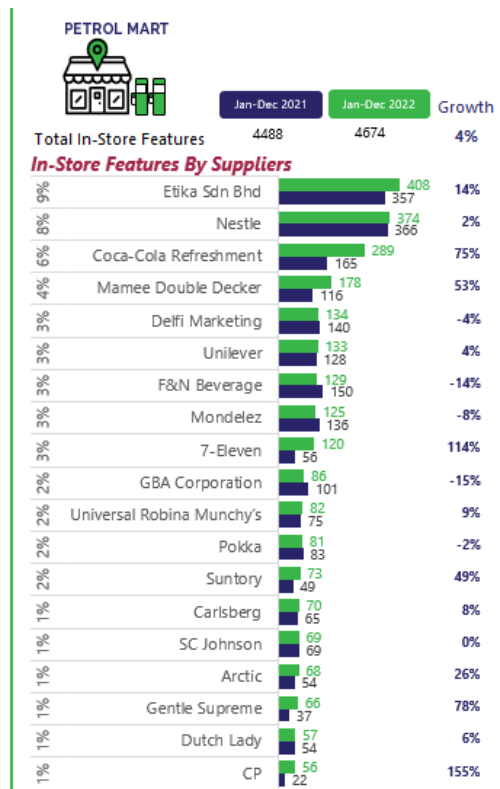
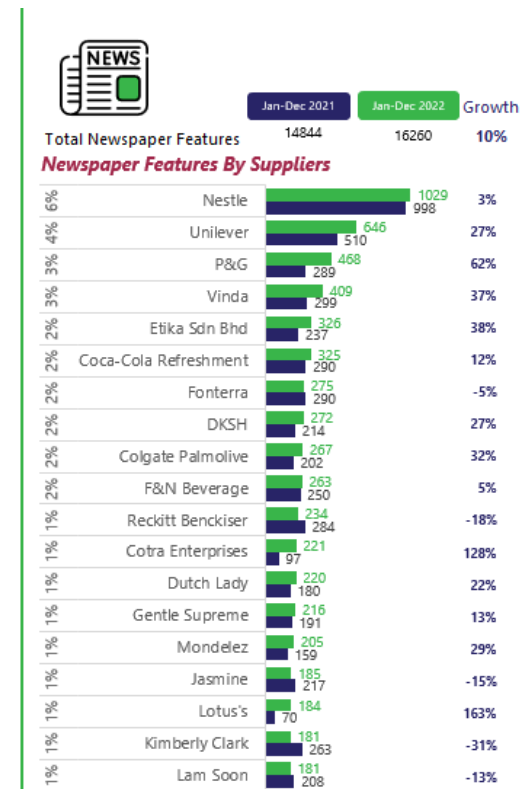
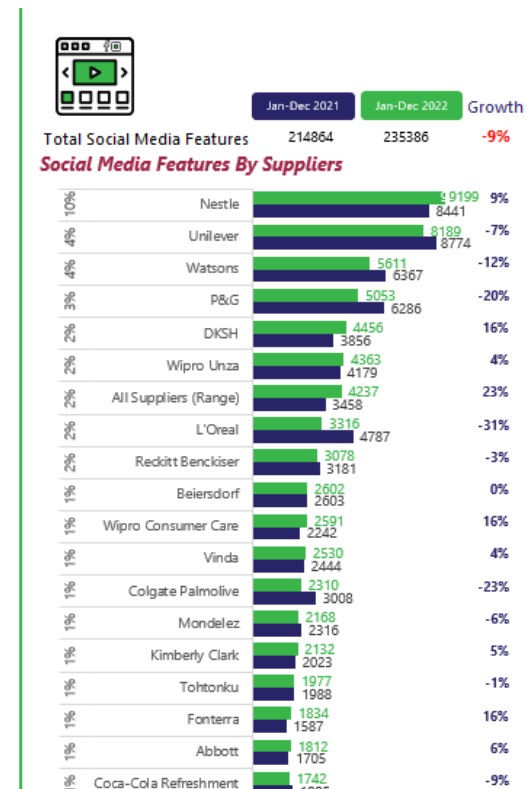
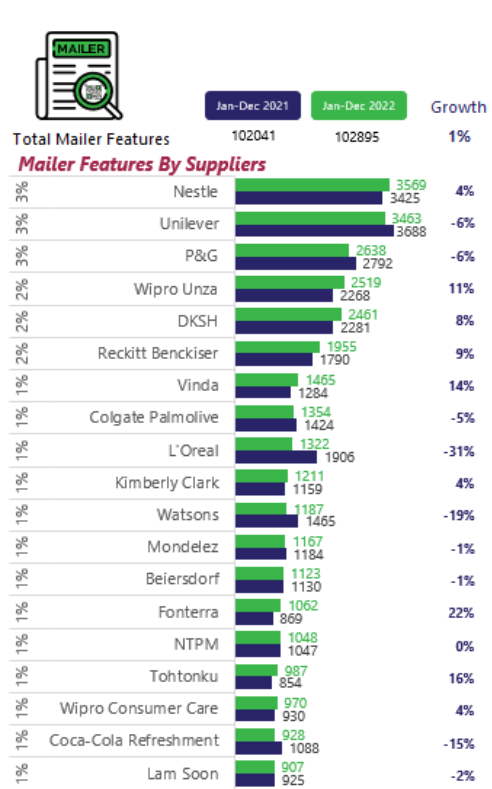


Average Social Media Features [Pharmacy]

	2021				2022				2021				2022				2021				2022				2021				2022			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
No. of Social Media Issued	674	1346	1434	1392	1234	1114	998	820	174	372	845	834	753	791	595	485	48	71	76	117	115	104	74	105	53	91	108	104	90	58	55	47
Average No. Of Feature Per Social Media	10	8	10	8	9	10	9	8	18	15	9	6	5	6	6	9	18	20	8	5	6	11	13	13	26	18	13	14	16	22	30	27
Grocery									1								2	3	1		1	1	1		1	1	1	1	2	2	1	
Household																													1			
Health & Beauty	10	7	9	8	8	10	8	8	18	15	9	6	5	6	6	9	16	17	7	5	5	10	12	12	25	17	12	13	15	20	28	26
Chilled & Frozen																																
Fresh																																
Electrical																																

In 2022, Nestle was the Top promoted supplier in digital media and other promotion sources except for instore promotions. Additionally, they have increased their promotions by 3%-9% vs YAG across all sources.

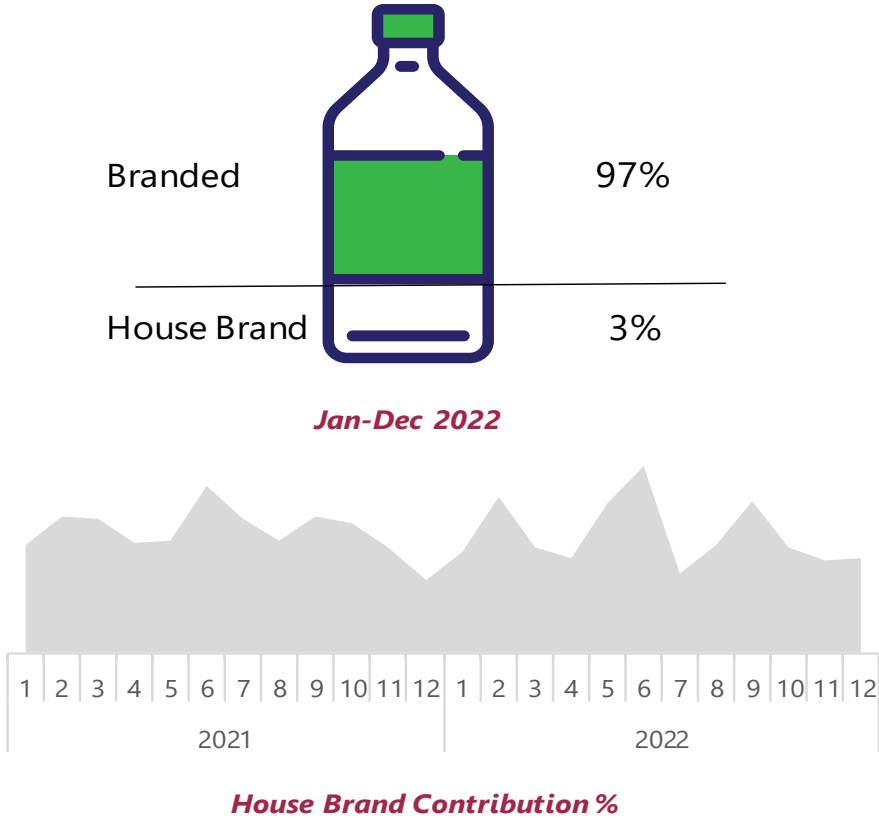
Meanwhile, Unilever lose their Top spot to Nestle in mailer and social media promotions after decreased by 6% and 7% respectively; Nearly all Top suppliers increased their newspaper promotions which leading to a 10% increase in overall growth vs YAG.



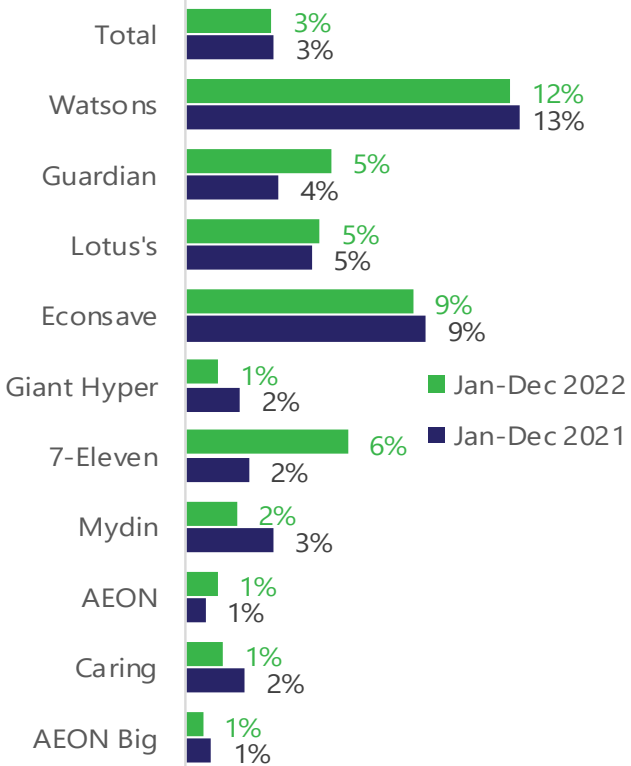
Source: MailerTrack Jan-Dec 2022 vs 2021, Mailer, Newspaper, In Store, Social Media & Digital Media Excluding Regional Data

Total House Brand promotions have maintained by 3%. Despite that, 7-Eleven have tripled their promotion vs YAG

Watsons, Giant, Mydin and Caring have reduced slightly in promoting House Brand while Top Hyper/Super and pharmacies maintained



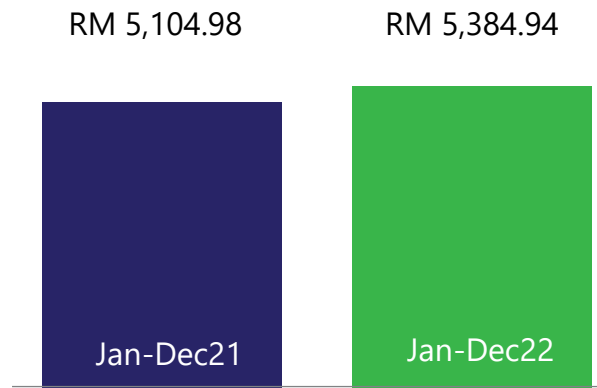
House Brand Contribution % by Retailer



Source: MailerTrack Jan-Dec 2022 vs 2021, Mailer, Newspaper, In Store, Social Media & Digital Media Excluding Regional Data

FY 2022 basket price increased by 5% vs YAG; Only Vegetable and Shampoo spotted slight reduced in promo price

Frozen Food, Meat and Yellow Fat promo price have increased significantly by 13%-23% while other categories noted an increase below than 10% vs YAG



(For Top 10 Matching SKUs for the Top 30 categories)

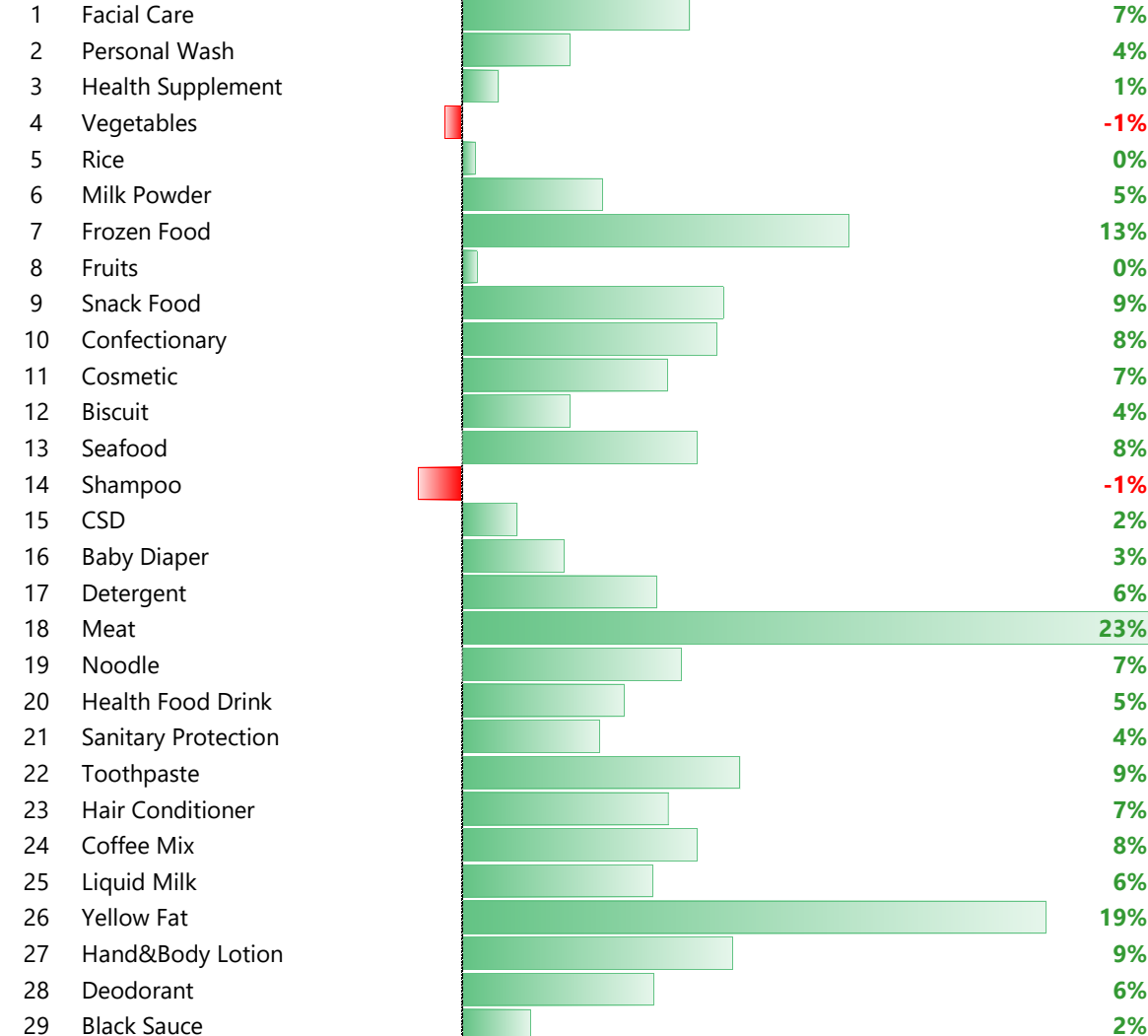
Basket Price Growth Rate for the Top 30 Categories & Top 10 Matched Features

Rank Top 30 Categories

- 1 Facial Care
- 2 Personal Wash
- 3 Health Supplement
- 4 Vegetables
- 5 Rice
- 6 Milk Powder
- 7 Frozen Food
- 8 Fruits
- 9 Snack Food
- 10 Confectionary
- 11 Cosmetic
- 12 Biscuit
- 13 Seafood
- 14 Shampoo
- 15 CSD
- 16 Baby Diaper
- 17 Detergent
- 18 Meat
- 19 Noodle
- 20 Health Food Drink
- 21 Sanitary Protection
- 22 Toothpaste
- 23 Hair Conditioner
- 24 Coffee Mix
- 25 Liquid Milk
- 26 Yellow Fat
- 27 Hand&Body Lotion
- 28 Deodorant
- 29 Black Sauce

Basket Price for the Top10 Matched Features

Jan-Dec 22 vs 21





Scan & Download



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