

FMCG Promotion Review (Pen Mal)

Jan- Jun 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



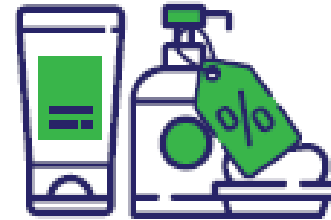
MT review number represents
number of promotion
features (occurrence) done
by each category/ retailer/
supplier in Mailer, Newspaper,
In-store (CVS & Petrol
Marts), Social Media & Digital
Media

3








































































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

4



Include
Range
Discount &
Buy X Free Y
Promotions

16 years of partnering key retailers to provide effective competitive and go-to-market information

YEAR	MAILER TRACKING	NEWSPAPER TRACKING	IN-STORE TRACKING	SOCIAL MEDIA TRACKING
2021 -				
2020 -				
2019 -	   	  		
2018 -	     	    		
2017 -	     	  		
2016 -	     	   		
2015 -	 	   	    	
2014 -	  	  		
2013 -		   		
2012 -				
2011 -				
2010 -				
2009 -				
2008 -				
2007 -	 	 		
2006 -	  	   		
Jun 2005 -	   	   		

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 started tracking in 2020 covering promotions from retailers official account on Facebook & Instagram and their own Mobile Apps

Retailer Website

Get your daily essentials delivered to your doorstep when you order online via HAPPYFRESH!

NS CAMPAIGNS RECIPES **Giant** GIANT MINI CUSTOMER CARE

ONS CATALOGUE



Facebook Post

Watsons 7 hrs · 🌐

ATTENTION #KakiWatsons! 🏃‍♂️ CEPAT! Harini last day **KAW KAW DEALS** with assortments of discounts and deals with UP TO 50% OFF* di KEDAI #WatsonsMalaysia dan ONLINE sehingga 3 January 2022! 🙌 <https://bit.ly/3GMXfLS>

- 👉 COSMETICS & WATSONS EXCLUSIVE BRAND UP TO 50% OFF!*
- 👉 HAIRCARE SECOND AT 80% OFF!*
- 👉 SKINCARE & HEALTHCARE UP TO 40% OFF!*

★ Spend & Win... See more



Facebook Mailer

lak lengkap hari minggu tanpa promosi hebat dari Lotus's. Keperluan diri dan perabot menarik menanti anda dengan diskaun sehingga 30%! Khas untuk ahli Clubcard pula, kami ada Kupon Jimat Lagi Ong! Dapatkan 2x kupon diskaun sehingga 8%*! Boleh berbelanja kelengkapan untuk Tahun Baru Cina. Barangan segar, kering dan keperluan dapur semuanya ada. Jom bersiap ke Lotus's sekarang!

Katalog Lotus's di sini: <http://bit.ly/TescoMYCatalogue>
Apa kemudahan pembelian yang ada di Lotus's?... See more



Video Post

99 Speedmart 18 January at 16:54 · 🌐

Cold beer and hotpot - the best combo for a smooth reunion this Chinese New Year!

Last chance to get a Neoflam Hotpot Set for FREE when you buy any 3 cartons of participating Carlsberg brands (minimum 1 carton of 1664 Blanc Can or Connor's Can) in a single receipt from 99 Speedmart this week. Limited stocks available!

*West Malaysia only. Selected Outlets Only. While Stock Last.... See more



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

Digital Media started tracking in 2022 covering promotions from Retailer Website and E-Catalogue (which can be accessed via QR code or softcopy only)



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-Jun 2022 vs 2021

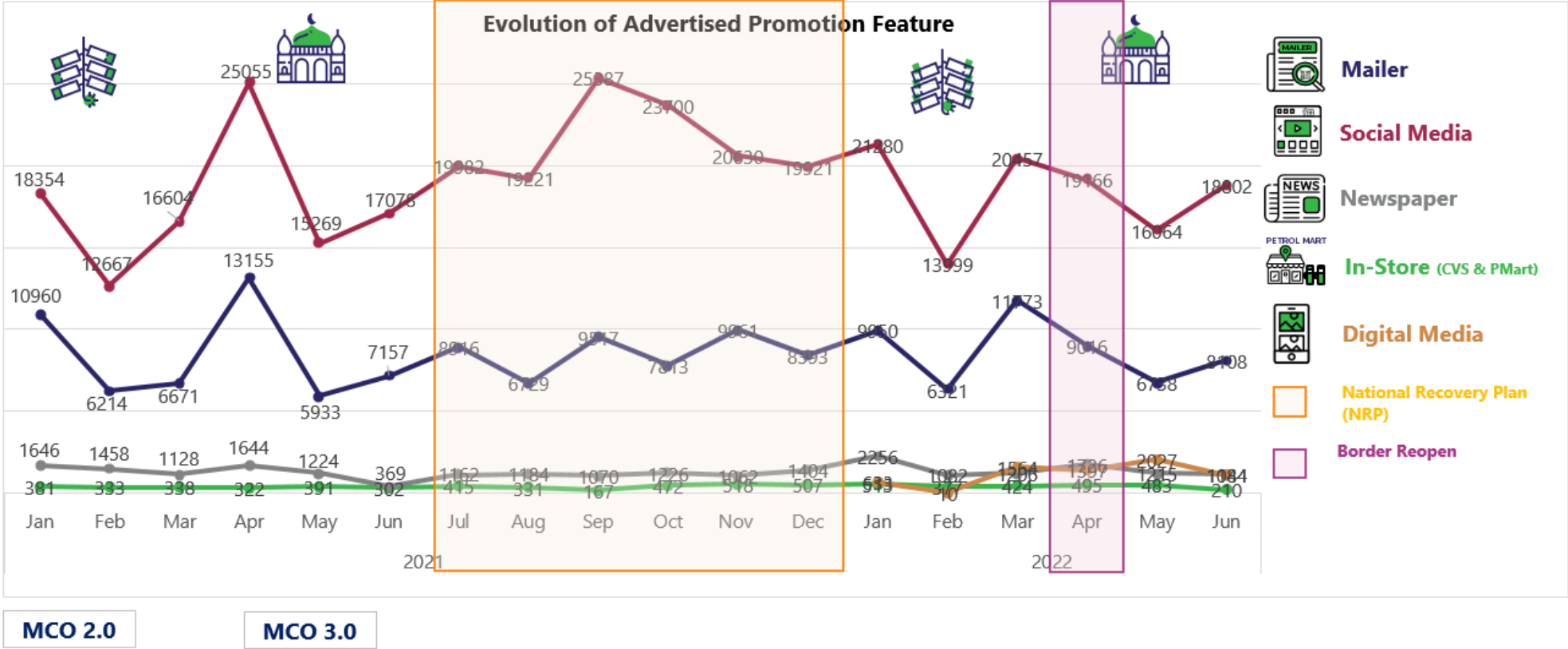
Social Media contributed to 62% of total promotions in 1H 2022, with 40% of these promotions coming from Pharmacies that adopted Range promo type since it able to advertised for total categories discount in a single post to show things simple and clear (such as weekend deals – Total Oral Care @ 40% off)

Digital Media source type was newly added in 2022, which are mainly catalogue promotions in softcopy/QR versions

Promotion Share		TOTAL PROMO FEATURES			NORMAL PROMO			RANGE PROMO			BUY X FREE Y		
		Jan-Jun 2021	Jan-Jun 2022	Growth	Jan-Jun 2021	Jan-Jun 2022	Growth	Jan-Jun 2021	Jan-Jun 2022	Growth	Jan-Jun 2021	Jan-Jun 2022	Growth
30%		50090	51906	4%	47159	47782	1%	2797	4055	45%	134	69	-49%
4%		7469	8629	16%	7076	7929	12%	361	695	93%	32	5	-84%
1%		2067	2502	21%	2016	2353	17%	13	50	285%	38	99	161%
62%		105027	109768	5%	96685	92648	-4%	7711	16683	116%	631	437	-31%
3%			6715			6512			200			3	

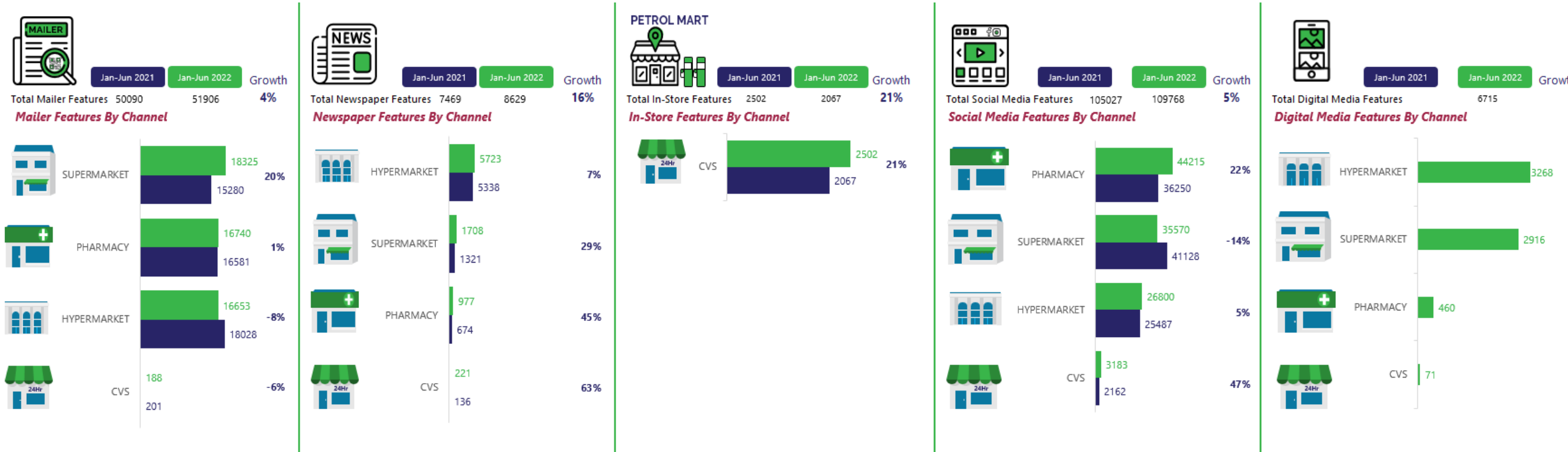
Decline in Feb22 promotions was driven by retailers and suppliers promoting in Jan22 due to the CNY festive falls in early Feb22. Promotions recovered in Mar22 as "Back to School," "Ramadhan," and "Baby Fair" promotions all falls in the same month but decreased in Apr22 and saw a downward trend despite Raya festive in May22

There hasn't been any new trend since government announced reopening of the border in Apr22



Growth by 4% in total mailer was mainly contributed by Supermarket, which increased by 20% vs YAG. This is due to TF Value Mart have started back promoting Mailer promotions in 2022 , while increased from other Supermarket such as Jaya Grocer that nearly doubled their promotion vs YAG

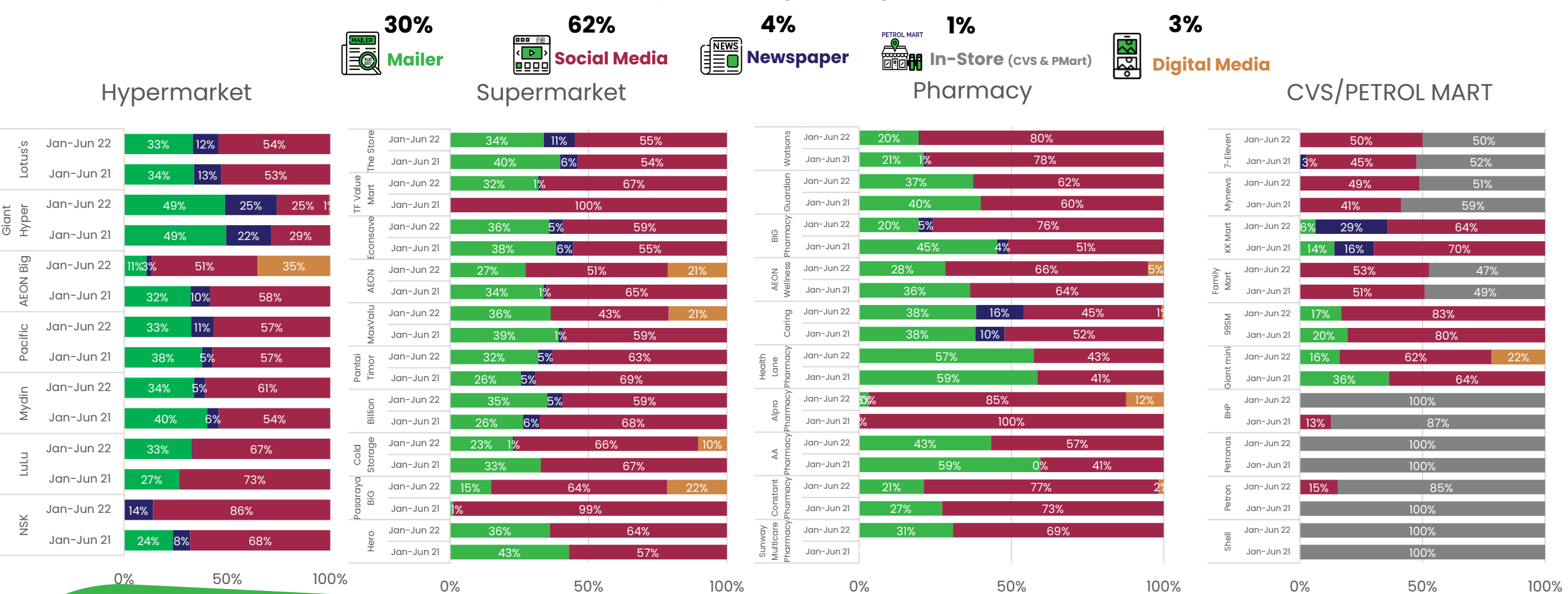
Aeon Group (Aeon Big, Aeon, Aeon Wellness and MaxValu) contributed 78% in newly added, Digital Media promotion



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

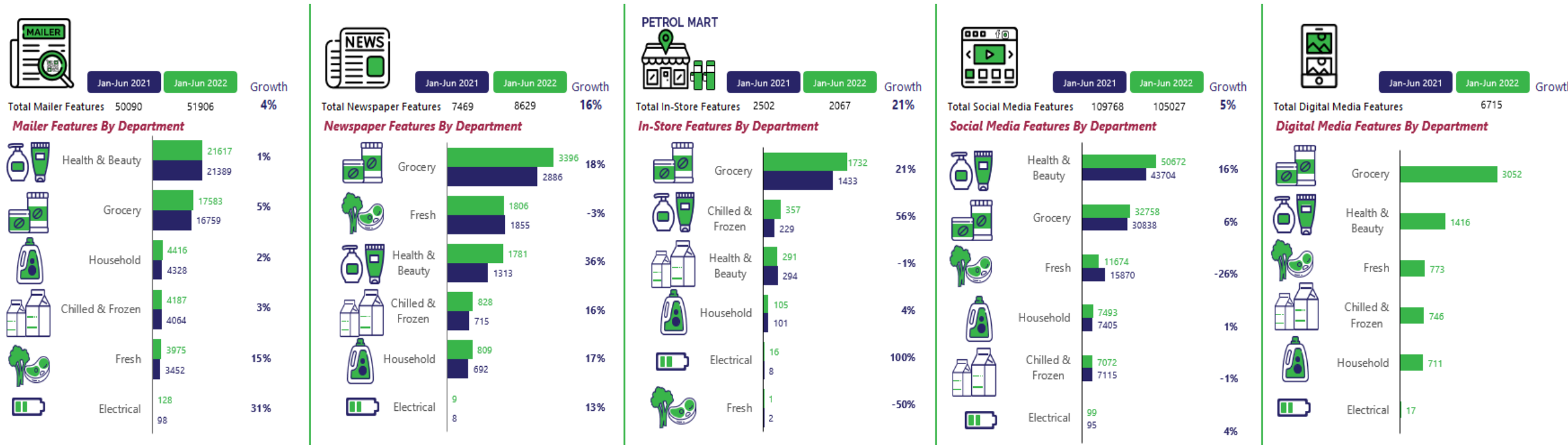
Giant and Health Lane Pharmacy were the only retailers that publish more physical mailers than social media promotions; both retailers also maintained their share of promotion through all the tracked mediums vs YAG. Meanwhile, NSK have stopped promoting mailers and instead only focused on newspaper and social media promotion in 1H 2022

Pandemic has drive to digitalization, few retailers such as Aeon Group, Cold Storage, Pasaraya Big, Alpro Pharmacy, Constant Pharmacy and Giant Mini have started promoting via Digital Media



Health & Beauty was the most promoted department in Mailer and Social Media promotion. This department saw minimal growth in Mailer but increased significantly by 16% in Social Media promotions which mainly contributed by Pharmacies

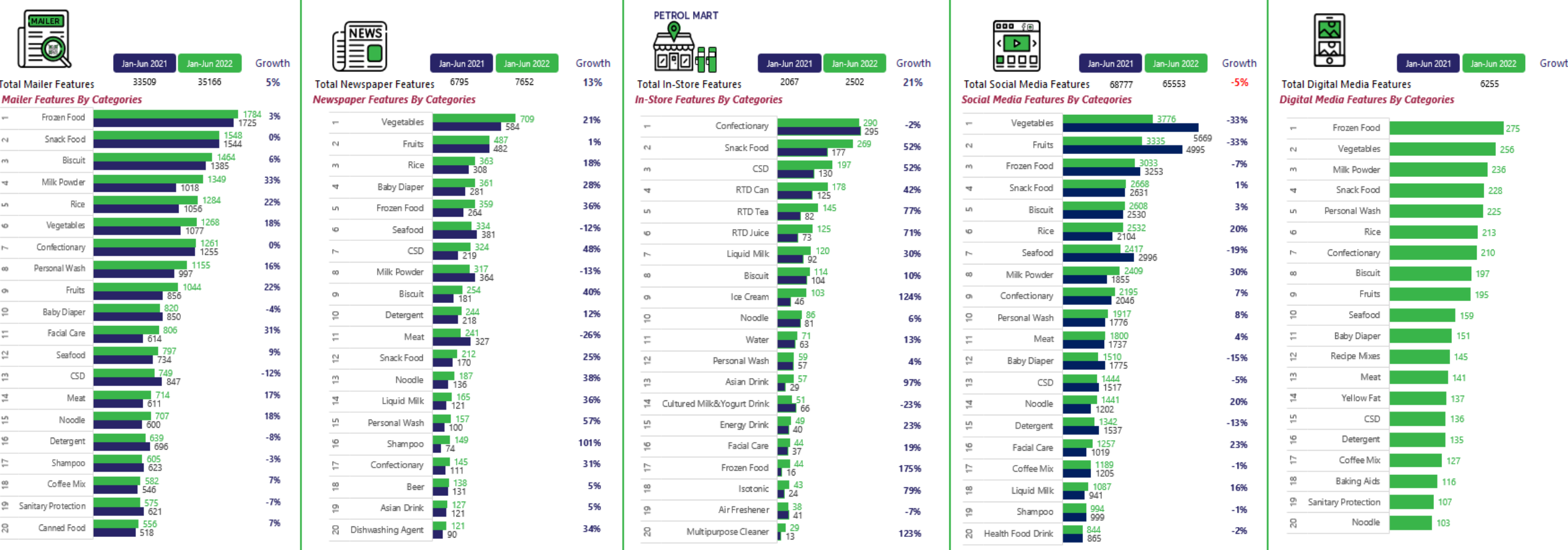
As for Digital Media, Grocery was the most featured department in this newly added medium



Source: MailerTrack Jan-Jun 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 5% for Social Media promotions. Fresh produce such as Vegetables and Fruits promotions were more focused in newspaper medium whereas noted reduced in Social Media medium mainly from Segi Fresh retailer Milk Powder category had the highest growth, increased by 33% and 30% in Mailer and Social Media promotions respectively in 1H 2022

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

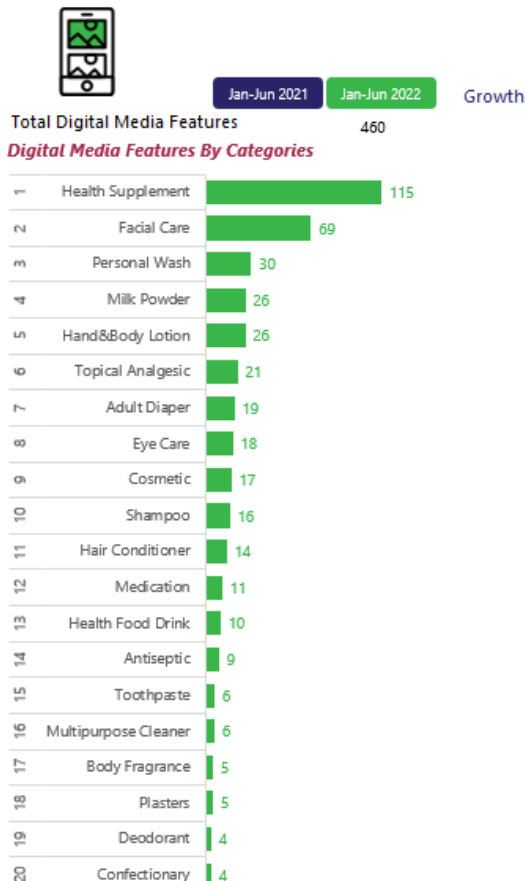
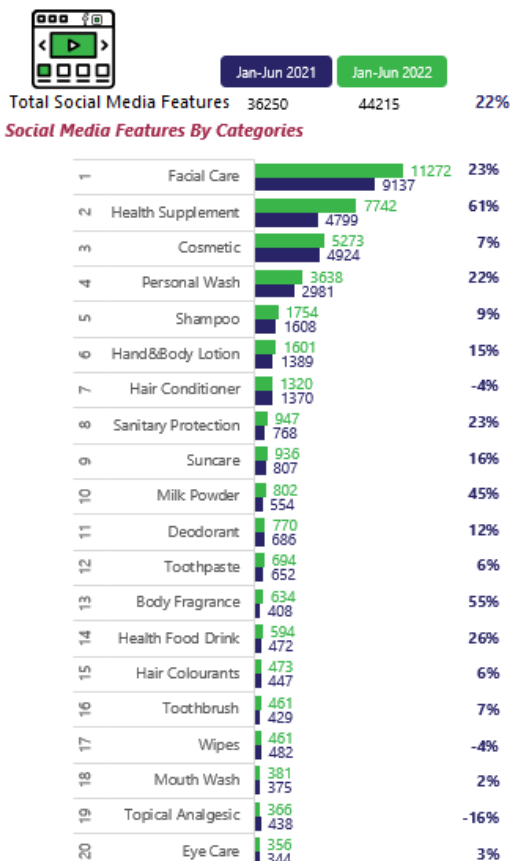
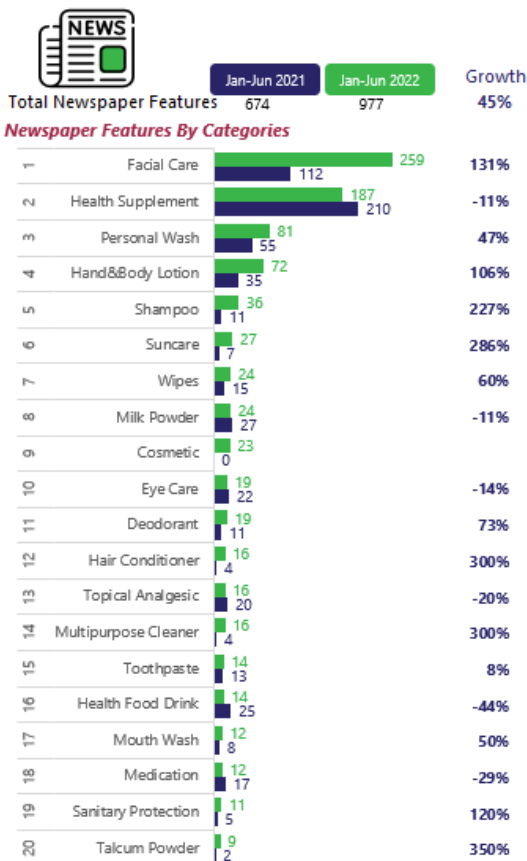
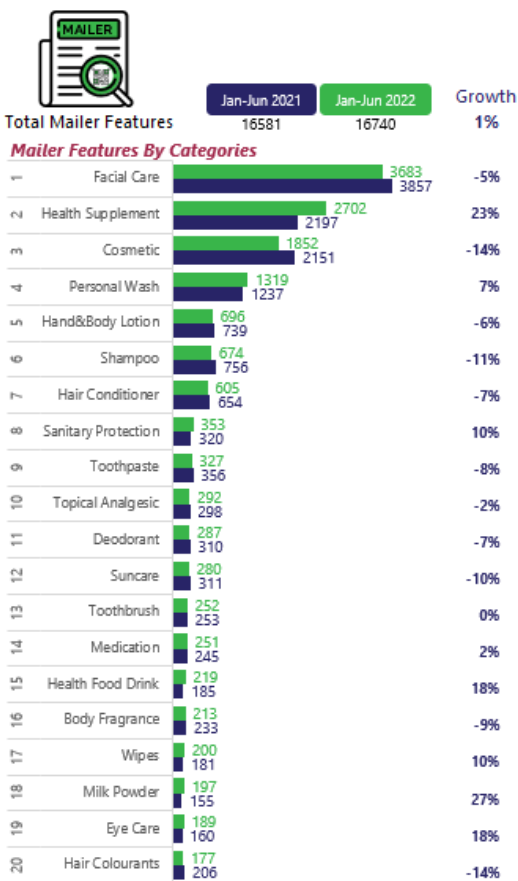


Source: MailerTrack Jan-Jun 2022 vs 2021, Mailer, Newspaper, In Store, Social Media & Digital Media Excluding Regional Data

Facial Care remain as the leading category in both Mailer and Social Media promotions for Pharmacy channel, noted to have also doubled up growth in newspapers mainly from Caring, whom noted to have reduced in their social media postings and have resume back in Newspaper promotions since Jul2021

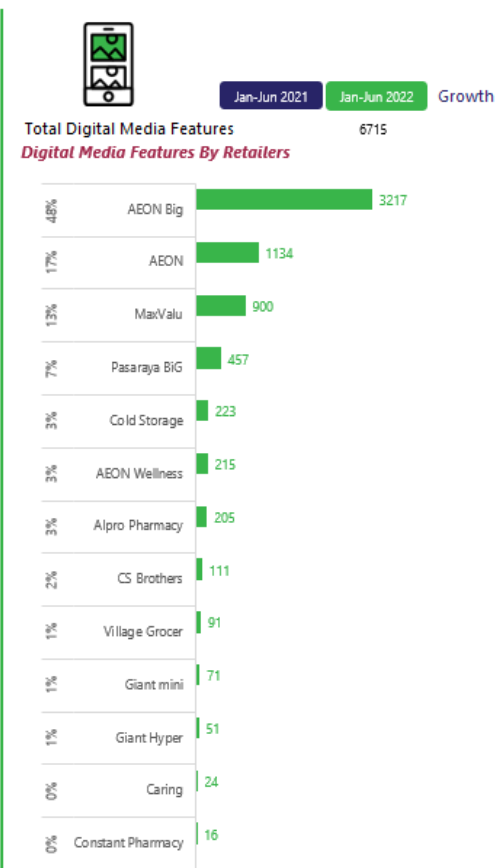
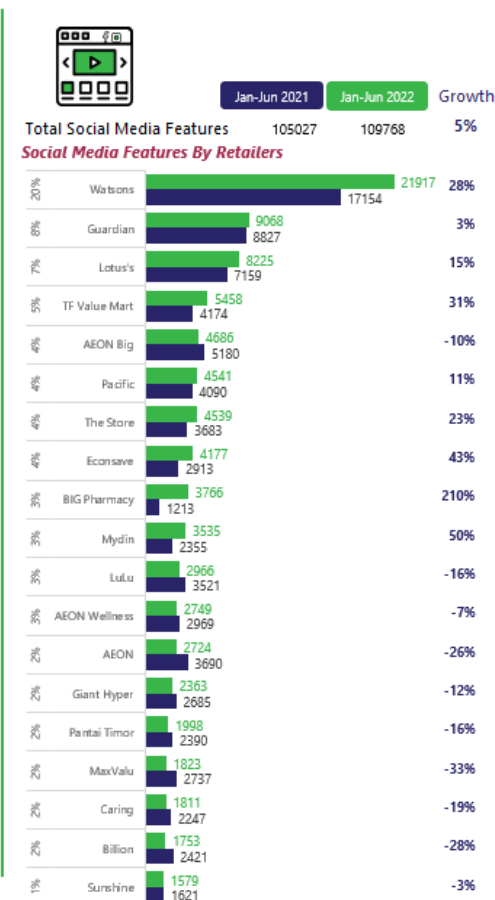
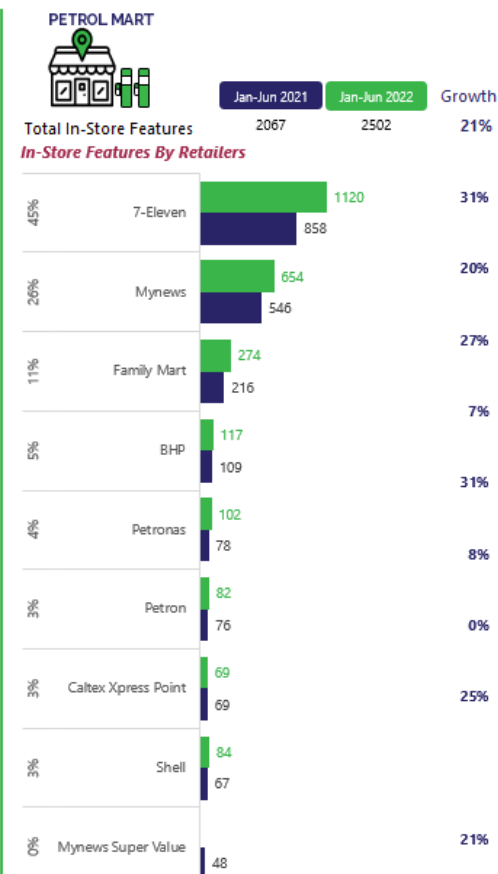
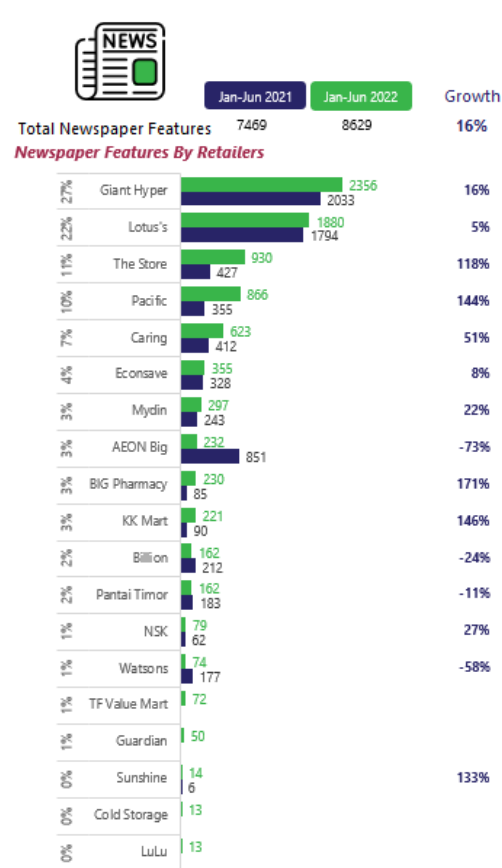
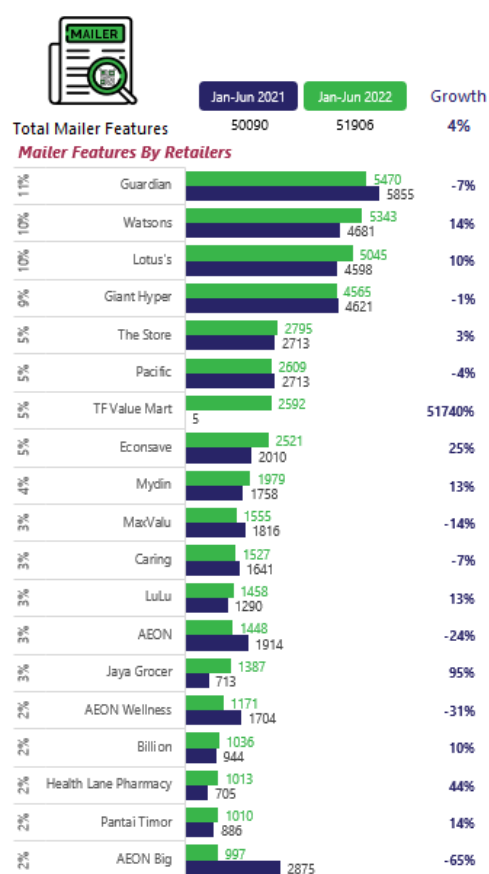
It's an effective tools to promote as retailers might be able to collect the feedback and increase the engagement such as customer live chat, commenting & etc

Promotion Features by Source by Categories [Pharmacies]



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

As advertisement that created through Social Media able to be interacting and lively to catch the attention, this may help to explain on the increment of implementation from Watsons (+28%)
 Despite a 4% growth in total mailer promotions, Aeon Group (Aeon Big, MaxValu, Aeon and Aeon Wellness) went against the market, declining in promotions by 14%-65% vs YAG



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

Number of Mailer and Digital Media issued by Aeon Big increased in Q2-22 but ave. number of features noted reduced

Promotion features at Aeon Big for each department also maintained in every quarter

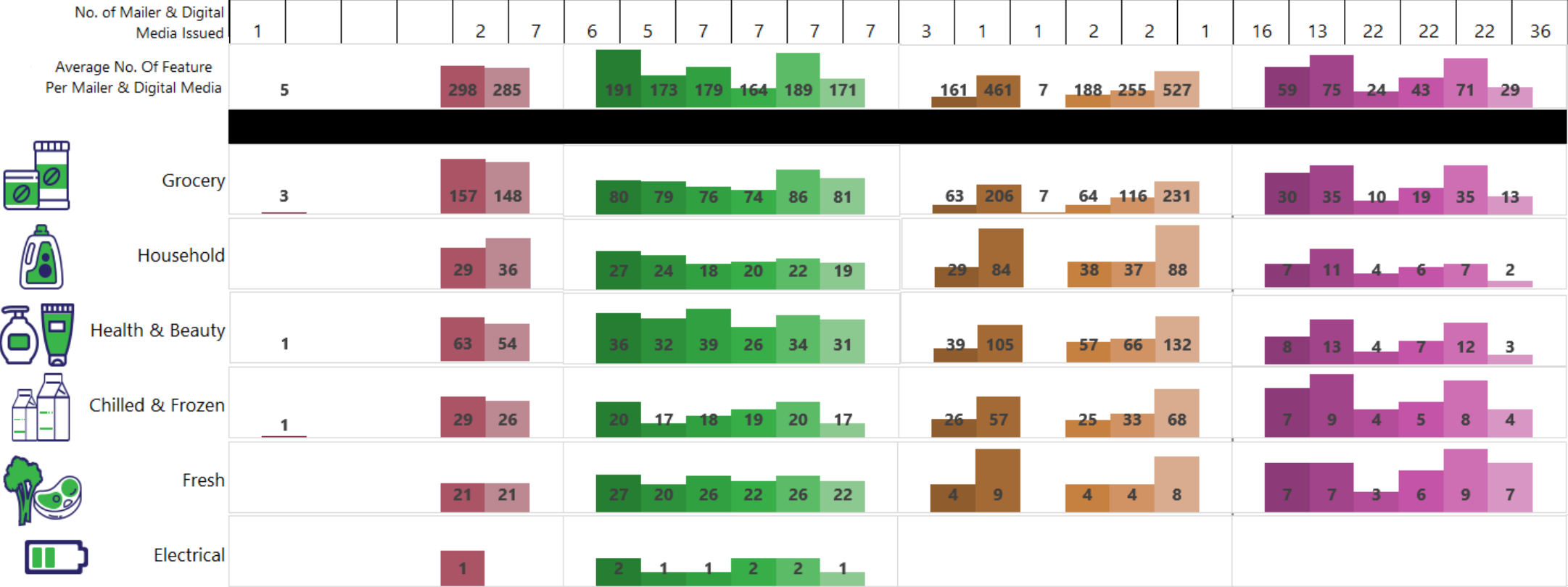
Average Mailer & Digital Media Features [Hyper]



Similar like Aeon Big, AEON's number of Mailer and Digital Media issued increased in Q2-22 but ave. number of features noted reduced

TF Value Mart who have started promoting back

Average Mailer & Digital Media Features [Super]



Ave. number of Mailer and Digital Media promotion issued by Top pharmacies maintained in 1H 2022

By looking at average number. of Mailer and Digital Media features, Aeon Wellness had the lowest features compared to other Top pharmacies

Average Mailer & Digital Media Features [Pharmacy]

No. of Mailer & Digital Media Issued

Average No. Of Feature Per Mailer & Digital Media



Grocery



Household



Health & Beauty



Chilled & Frozen



Fresh



Electrical



2021				2022		2021				2022		2021				2022		2021				2022	
Q1	Q2	Q3	Q4	Q1	Q2	Q1	Q2	Q3	Q4	Q1	Q2	Q1	Q2	Q3	Q4	Q1	Q2	Q1	Q2	Q3	Q4	Q1	Q2
3	3	4	2	4	4	4	4	5	2	4	3	2	2	1	2	2	4	4	3	4	2	4	3
<div><div>782</div><div>778</div><div>643</div><div>825</div><div>576</div><div>760</div></div>						<div><div>621</div><div>843</div><div>534</div><div>931</div><div>801</div><div>756</div></div>						<div><div>384</div><div>437</div><div>613</div><div>515</div><div>358</div><div>209</div></div>						<div><div>223</div><div>271</div><div>159</div><div>227</div><div>197</div><div>199</div></div>					
<div><div>35</div><div>30</div><div>26</div><div>38</div><div>29</div><div>37</div></div>						<div><div>23</div><div>32</div><div>17</div><div>29</div><div>35</div><div>33</div></div>						<div><div>43</div><div>61</div><div>67</div><div>63</div><div>36</div><div>23</div></div>						<div><div>5</div><div>3</div><div>3</div><div>11</div><div>8</div><div>15</div></div>					
<div><div>30</div><div>34</div><div>24</div><div>40</div><div>24</div><div>31</div></div>						<div><div>3</div><div>6</div><div>8</div><div>14</div><div>17</div><div>15</div></div>						<div><div>5</div><div>10</div><div>16</div><div>14</div><div>13</div><div>6</div></div>						<div><div>3</div><div>3</div><div>4</div><div>4</div><div>5</div><div>6</div></div>					
<div><div>716</div><div>714</div><div>593</div><div>747</div><div>523</div><div>692</div></div>						<div><div>595</div><div>802</div><div>507</div><div>885</div><div>750</div><div>705</div></div>						<div><div>334</div><div>365</div><div>528</div><div>436</div><div>309</div><div>180</div></div>						<div><div>215</div><div>265</div><div>152</div><div>213</div><div>184</div><div>178</div></div>					
<div><div>1</div></div>						<div><div>1</div><div>1</div><div>1</div><div>1</div></div>						<div><div>1</div><div>1</div></div>											
<div><div>1</div></div>																							
<div><div>1</div></div>						<div><div>1</div><div>2</div><div>1</div><div>3</div><div>1</div></div>						<div><div>2</div><div>2</div><div>2</div><div>2</div><div>1</div><div>1</div></div>											

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

Social Media posting was mainly contributed by Lotus, Giant & Aeon Big in 1H 2022 with more than 100 posting per quarter

In 1H 2022, Mydin have also increased significantly in Social Media issued but ave. number of features per Social Media reduced






Average Social Media Features [Hyper]

Lotus's

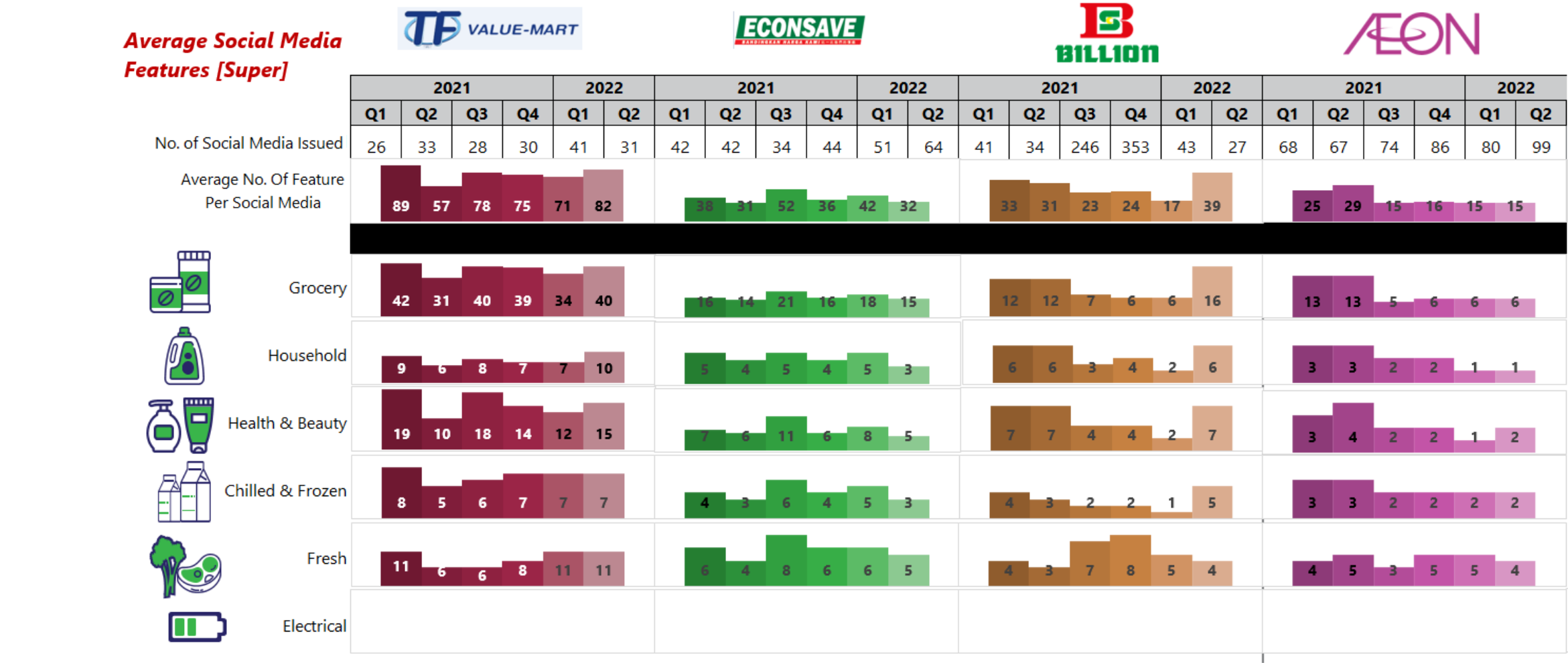
Giant

AEON BIG

MYDIN

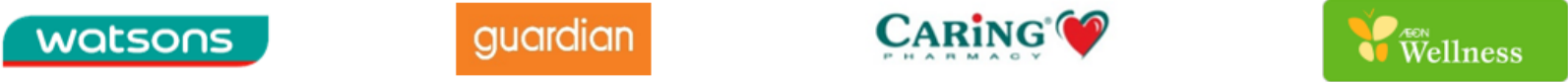
	2021						2022						2021						2022					
	2021		2022		2021		2022		2021		2022		2021		2022		2021		2022		2021		2022	
	Q1	Q2	Q3	Q4	Q1	Q2	Q1	Q2	Q3	Q4	Q1	Q2	Q1	Q2	Q3	Q4	Q1	Q2	Q1	Q2	Q3	Q4	Q1	Q2
No. of Social Media Issued	111	106	128	131	161	133	111	107	114	132	155	122	99	93	120	157	131	139	31	37	52	57	97	73
Average No. Of Feature Per Social Media	28	38	33	34	26	30	13	12	10	9	9	8	28	26	20	18	17	18	37	33	19	28	21	20
 Grocery	9	10	7	8	7	8	10	12	12	10	8	8	6	8	6	5	2		11	8	6	8	4	5
 Household	2	3	2	2	2	1	2	2	3	2	2	2	2	3	3	2	1		4	3	3	2	2	2
 Health & Beauty	4	4	4	5	3	4	5	5	5	4	3	4	2	3	3	4	1		9	7	7	6	3	4
 Chilled & Frozen	2	4	2	2	2	2	2	3	2	2	2	1	1	2	1	1	1		2	2	1	1	1	1
 Fresh	3	2	2	2	2	2	1	1	1	1	1	1	1	1	1	2	1		3	2	2	2	1	1
 Electrical																								







Billion ave. number of Social Media features increased in Q2-22 which resulted to increase in number of features for every departments except for Fresh



Aeon Wellness number of Social Media issued decline in Q2-22 but ave. number of features increased

Average Social Media Features [Pharmacy]

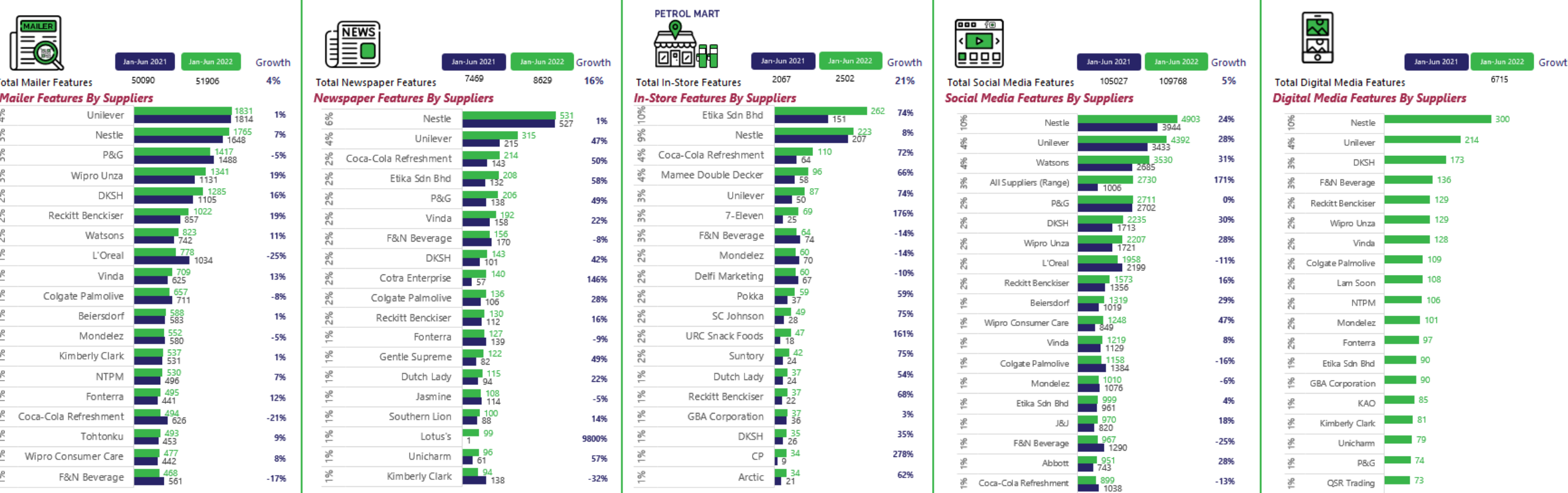


	2021				2022		2021				2022		2021				2022		2021				2022	
	Q1	Q2	Q3	Q4	Q1	Q2	Q1	Q2	Q3	Q4	Q1	Q2	Q1	Q2	Q3	Q4	Q1	Q2	Q1	Q2	Q3	Q4	Q1	Q2
	674	1345	1435	1392	1234	1113	174	372	843	834	753	791	48	71	76	117	115	104	53	91	108	104	90	58
No. of Social Media Issued																								
Average No. Of Feature Per Social Media	10	8	10	8	9	10	18	15	9	6	5	6	18	20	8	5	6	11	26	18	13	14	16	22
 Grocery							1						2	2	1	1	1	1						1
 Household																								
 Health & Beauty	3	2	2	1	2	2	14	9	3	2	4	3	14	10	7	7	5	7	16	9	6	4	6	9
 Chilled & Frozen																								
 Fresh																								
 Electrical																								

Nestle was the most promoted suppliers in Newspaper, Social Media and newly added, Digital Media. As for Mailer promotion, Unilever maintained as Top promoted suppliers.

Vinda total promotions across all mediums have increased by 18% while NTPM and Kimberly Clark maintained vs YAG

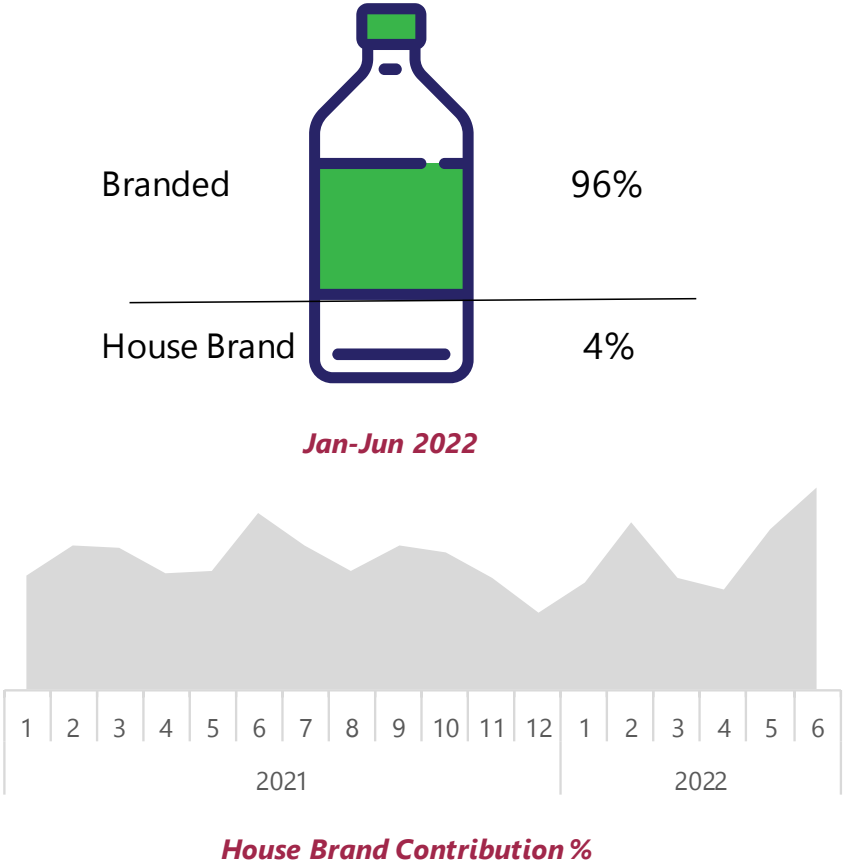
F&N promotions decreased by 8%-25% in all mediums which resulted to 15% decline in total promotions vs YAG; Coca Cola total promotions saw a slight decline by 4% vs YAG which mainly due to their decreased by 21% in Mailer promotions



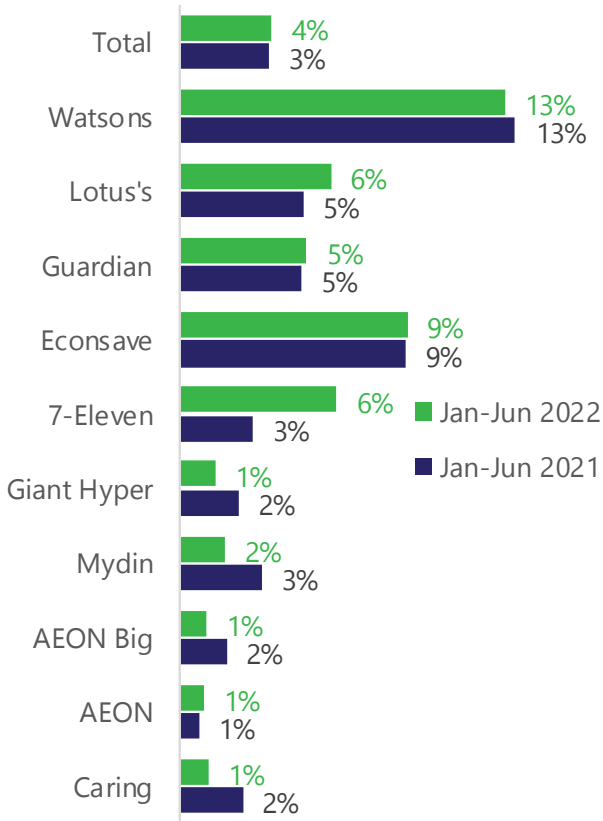
Source: MailerTrack Jan-Jun 2022 vs 2021, Mailer, Newspaper, In Store, Social Media & Digital Media Excluding Regional Data

House Brand promotions have growth slightly by 1%, mainly contributed by increased from Lotus's and 7-Eleven

As compared to hyper/super and pharmacy, major hyper/super such as Giant, Mydin and Aeon Big have reduced in promoting House Brand while Top pharmacies maintained



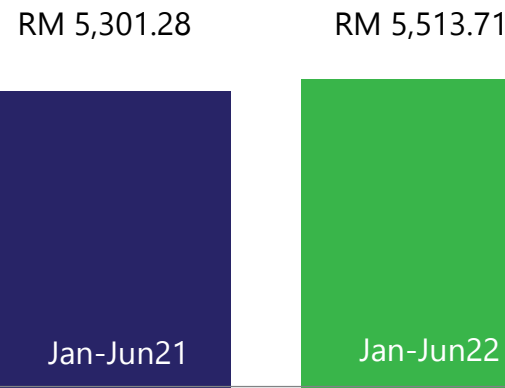
House Brand Contribution % by Retailer



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

1H 2022 basket price increased by 4%vs YAG; Only Rice, Shampoo, CSD and Black Sauce spotted slight reduced in promo price

Fruits, Meat and Yellow Fat promo price have increased significantly by 10%-26% while other categories noted an increase below than 10% vs YAG



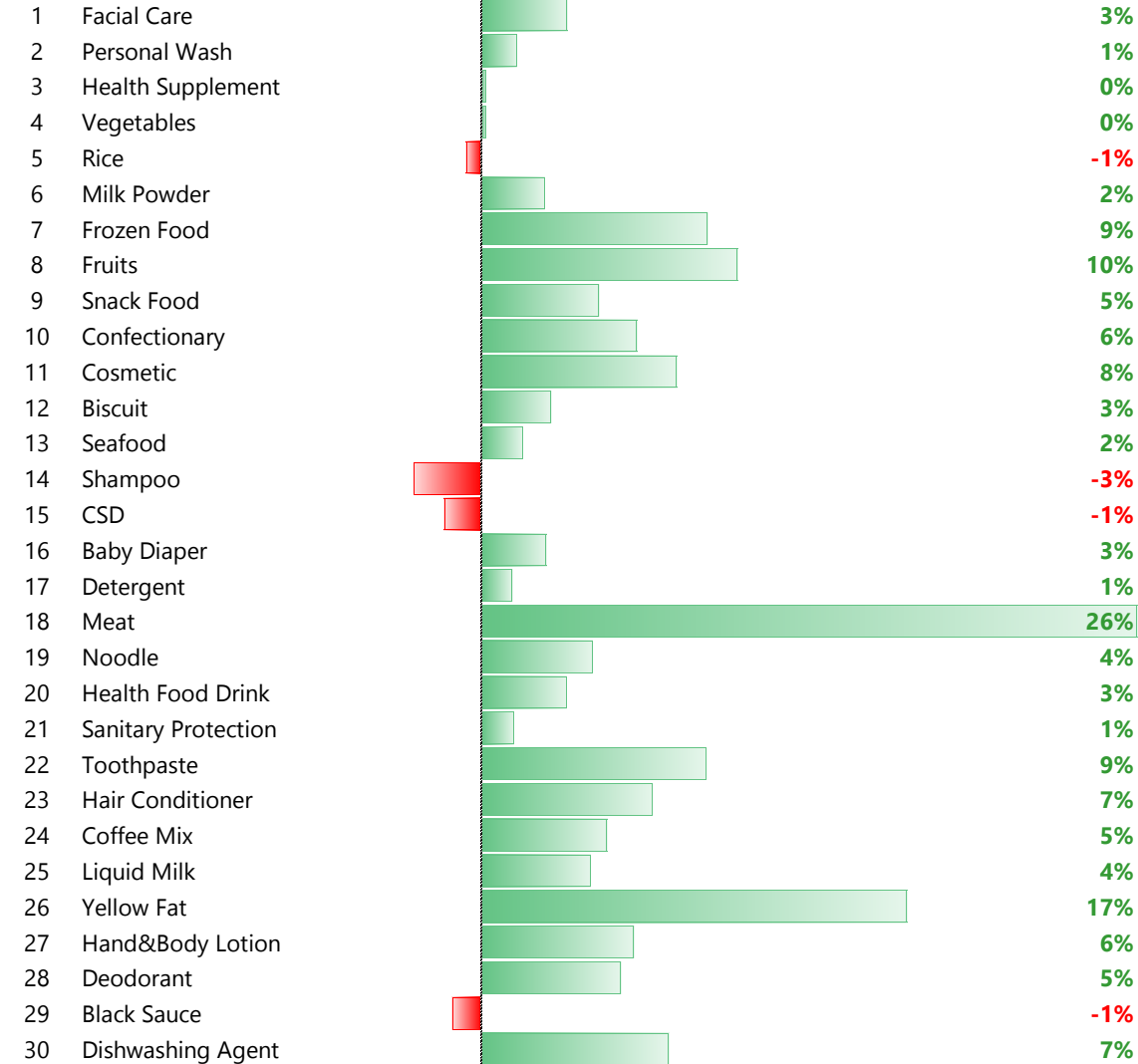
(For Top 10 Matching SKUs for the Top 30 categories)

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

Rank Top 30 Categories

Basket Price for the Top10 Matched Features

Jan-Jun 22 vs 21





Scan & Download



Contact Details

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