



FMCG Promotion Review Jan-Jun 2019 vs 2018

Notes of MailerTrack Information

1



Price information is based on **Published Promotion Price in mailer/newspaper** and not everyday shelf pricing

2



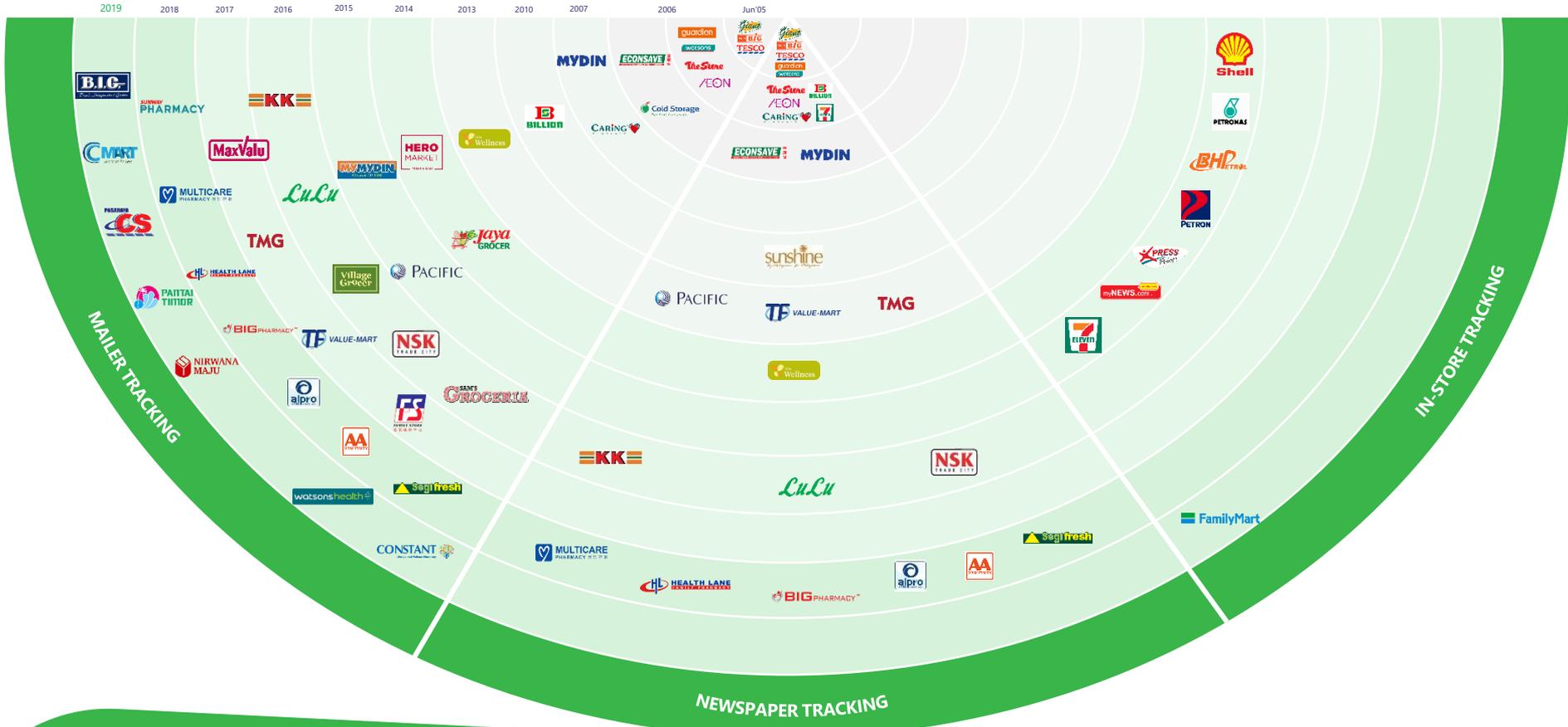
MT review number represents **number of promotion features (occurrence)** done by each category/ retailer/ supplier in mailer and newspaper

3



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

13 years of key retailers back data - More effective go-to-market information



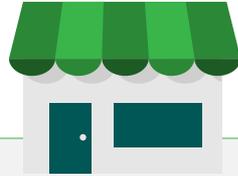
There were categories and subcategories that newly tracked in 2018; the promotion features will reflect in the like for like analysis in the upcoming slides

 Grocery	 Health & Beauty	 Household	 Fresh	 Chilled & Frozen	 Battery
<ul style="list-style-type: none"> • All-In-One Cereal • Asian Drink • Baking Aids • Beer • Biscuit • Black Sauce • Canned Food • Coffee Mix • Cold Cereal • Confectionary • Cooking Aids • Cooking Noodle • Cordial • CSD • Energy Drink • Evaporated Milk • Health Food Drink • Honey • Hot Cereal • Infant Cereal • Instant Coffee • Instant Soup • Instant/Pre Cooked Meal • Isotonic • Liquid Milk • Dressing Sauce • Milk Powder • Noodle • Oil • Olive Oil • Pasta • Pasta Sauce • Powder Creamer • Recipe Mixes • Red Sauce • Rice • RTD Can • RTD Tea • SCM/SBC • Snack Food • Spread • Stock • Tea • Tea Mix • Water • Wine 	<ul style="list-style-type: none"> • Adult Diaper • Antiseptic • Baby Diaper • Cosmetic • Cotton Wool & Tips • Dental Floss • Deodorant • Eye Care • Facial Care • Feminine Care • Hair Colourants • Hair Conditioner • Hair Styling • Hand&Body Lotion • Health Supplement • Medication • Mouth Wash • Personal Wash • Plasters • Razor&Blade • Sanitary Protection • Shampoo • Suncare • Talcum Powder • Toothbrush • Toothpaste • Topical Analgesic • Wipes 	<ul style="list-style-type: none"> • Air Freshener • Bathroom Cleaner • Bleach • Dehumidifier • Detergent • Dishwashing Agent • Fabric Care • Fabric Softener • Facial Tissue • Floor Cleaner • Glass Cleaner • Kitchen Towel • Laundry Sanitiser • Multipurpose Cleaner • Paper Wipes • Pest Control • Pet Food • Toilet Bowl Cleaner • Toilet Roll 	<ul style="list-style-type: none"> • Dry Seafood • Eggs • Fruits • Meat • Seafood • Vegetables 	<ul style="list-style-type: none"> • Cheese • Cultured Milk & Yogurt Drink • Frozen Food • Ice Cream • Pasteurised Milk • RTD Juice • Yellow Fat • Yogurt 	<ul style="list-style-type: none"> • Battery

We track on the following promotion types in CVS and Petrol Marts and classified the source as InStore

Convenient Store

Petrol Marts



**Window
Poster**



**Gondola End
Header Board**



**Checkout
Counter Poster**



**Fridge Sticker at
Chiller Door**



**Checkout Counter
Promotion**



**Wobblers/ Shelf
Promotion**

Peraduan: 11 Jan - 25 Feb 2019
 Beli produk P&G bernilai RM35 & ke atas dalam satu resit

PERCUMA

Pemegang Kulit Angpow & Paket Angpow!

HADIAH UTAMA
 x1 EMAS BERNILAI RM1,888

HADIAH KEDUA
 x3 LOKET EMAS BERNILAI RM888

Langkah-langkah Peraduan

LANGKAH 1 BELI
 produk P&G bernilai RM35 dan ke atas dalam satu resit.

LANGKAH 2 CIPTA
 slogan kreatif dalam 10 perkataan.

LANGKAH 3 MMS
 kepada: +017 2530749
 CONTOH: <ECONSAVE>_<NAMA PENUH>
 <IC><NO RESIT>_<SLOGAN>
 (Hantar bersama gambar resit asal sebagai bukti pembelian produk)

Dynamo
 Pencuci Pakaian
 (Pelbagai Variasi)
 2.7kg/ 3kg
 RM 1788 setiap

Head & Shoulders
 Syampu
 (Pelbagai Variasi)
 315ml/ 330ml
 RM 1268 setiap

Jenama-jenama yang terlibat:

FREE
 Genki Pants
 4's / 8's
 (On Pack)

SAVE 28%

RM 20

Starting from 2018 onwards, MailerTrack promotion feature is tag with multiple promo mechanics.

For example, [Head & Shoulder Shampoo 315ml/330ml Assort](#) had several Promo Mechanics as below:

1. **GWPC** - Buy RM35 & above FOC Pemegang Kulit Angpow & Paket Angpow
2. **MPC** - Buy RM35 & above entitled to join Peraduan Gold Rush Contest
3. **PO** – Normal price offer at RM12.68

Promotion in MailerTrack 2.0 break down into 3 different types:

Normal Promo



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

Range Promo



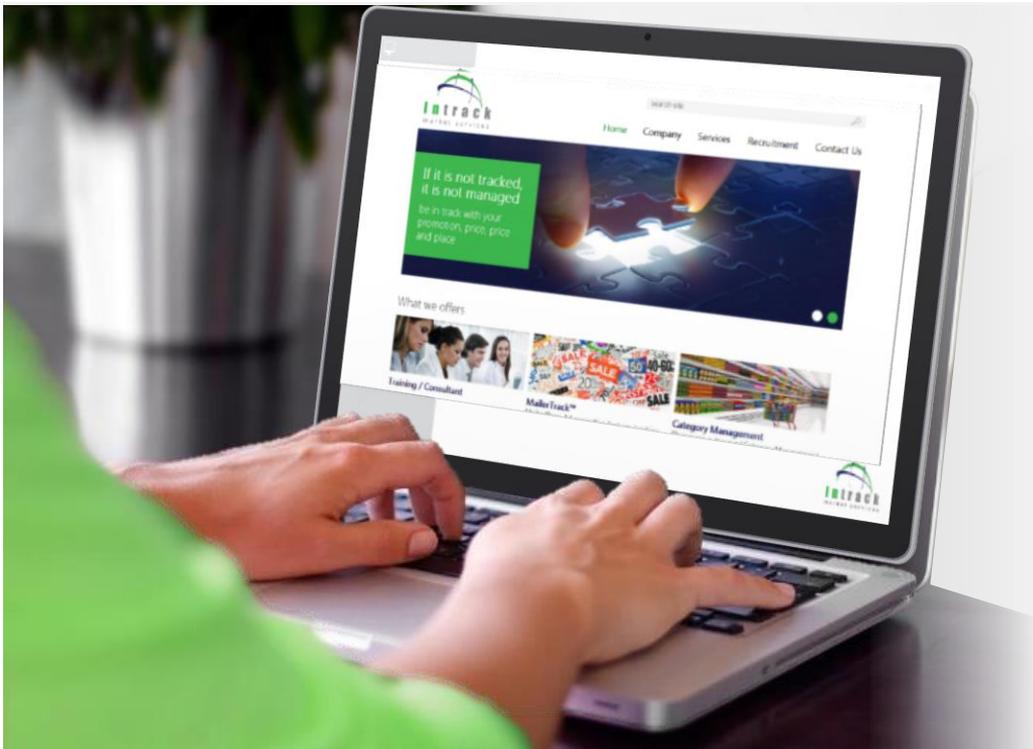
Where promotion **comes with a range** that is in percentage discount/ in price discount range

Buy X Free Y



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

Agenda



- **Total FMCG Overview**

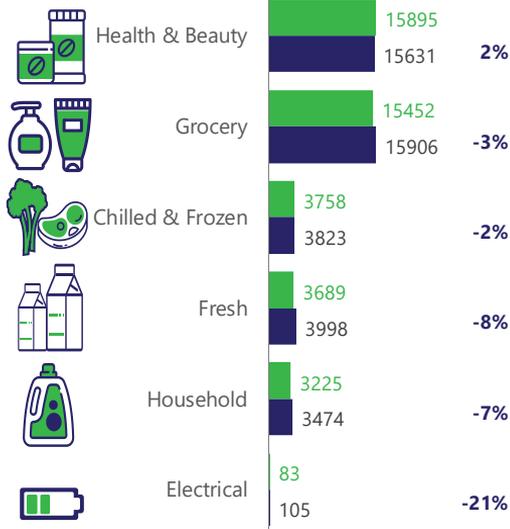
- *Mailer, Newspaper & Instore trend*
- *Evolution of Mailer & Newspaper*
- *Importance of House Brand*
- *Price Competitiveness*

Source: MailerTrack - All channels, excluding regional promotion, Jan-Jun 2019 vs. 2018

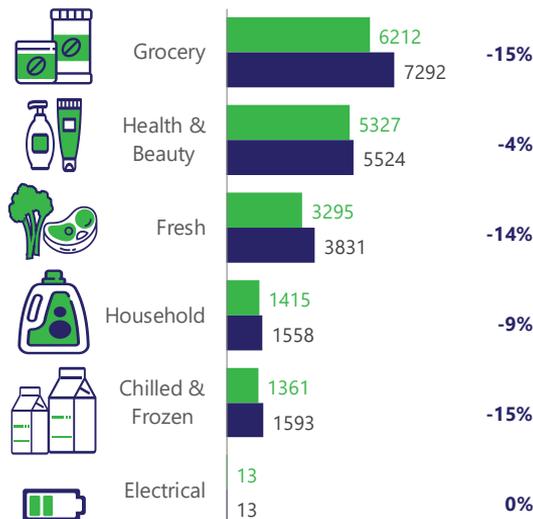
Promotion features in both Mailers and Newspapers had declined by 2% and 11% which were contributed by all departments except H&B in Mailers



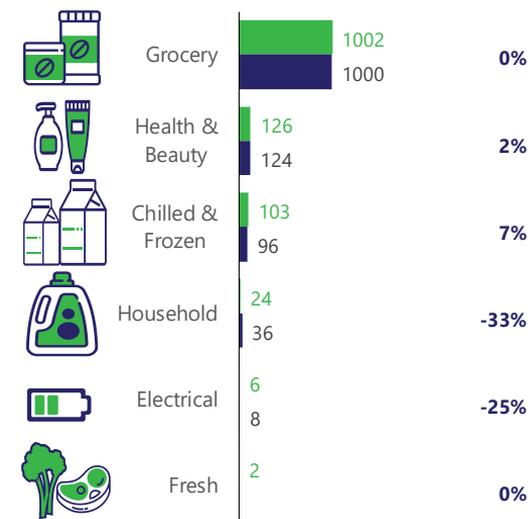
Mailer Features By Department



Newspaper Features By Department



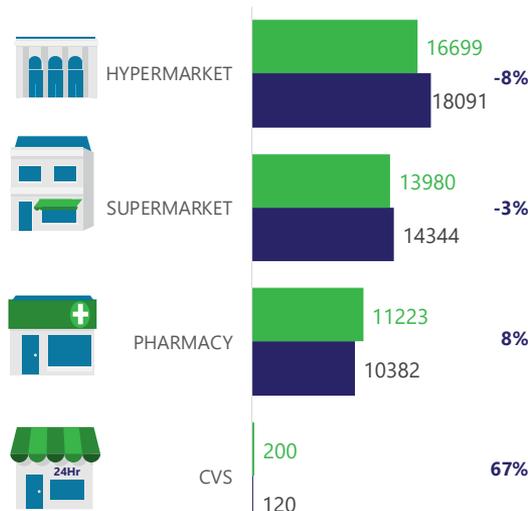
In-Store Features By Department



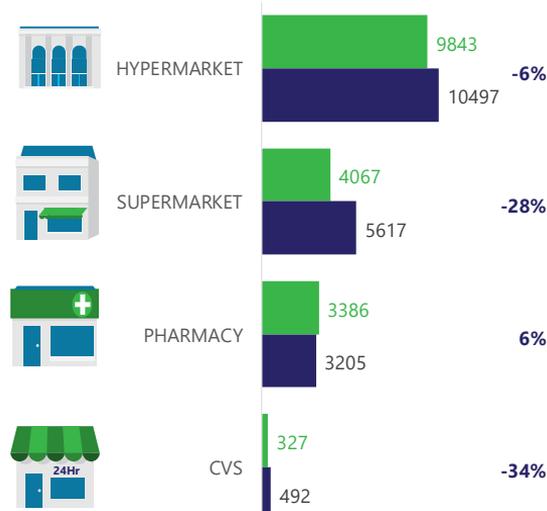
Pharmacies was the only one that registered a growth of promotion features for 1H-19 whilst Hypers and Supers declined in promotions by 3% to 28% (28% came from Supers Newspapers)



Mailer Features By Channel



Newspaper Features By Channel



In-Store Features By Channel



Normal Promotions (any form of price off, premiums, bonus pack) feature type contributed to the growth of mailers whereas Range Discounts feature type registered declined by about 10% vs YAG

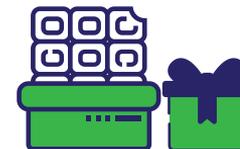
NORMAL PROMO



RANGE PROMO



BUY X FREE Y



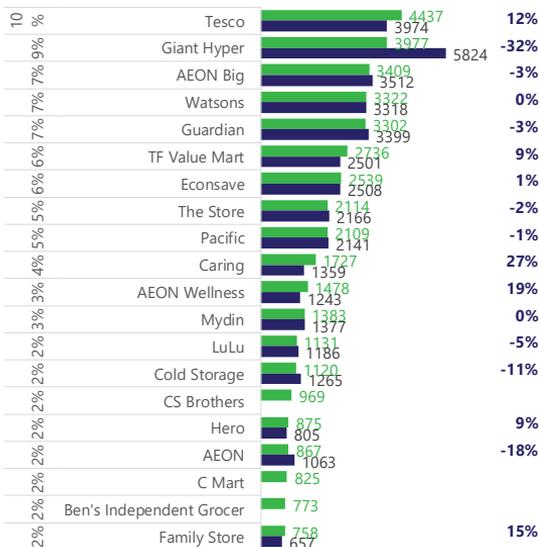
	Jan-Jun 2018	Jan-Jun 2019	Growth	Jan-Jun 2018	Jan-Jun 2019	Growth	Jan-Jun 2018	Jan-Jun 2019	Growth
	41060	44451	8%	2259	1938	-14%		39	
	18475	16545	-10%	1446	1317	-9%		34	
	1263	1365	8%	2	6	200%		28	

Tesco practiced different strategy by reducing promotion on newspaper and focused more on mailers as compare to other key retailers

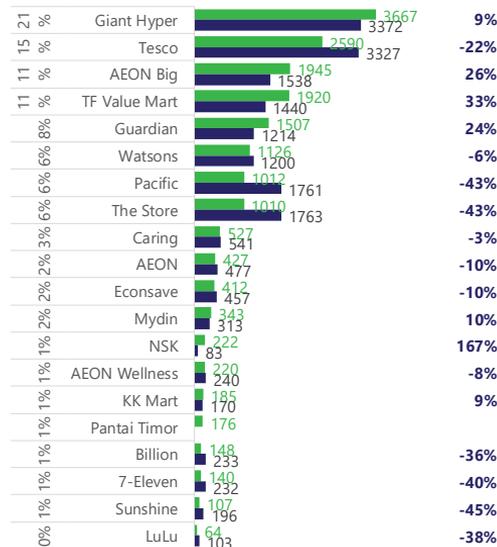
Meanwhile, only TF Value Mart increased promotion for both mailer and newspaper



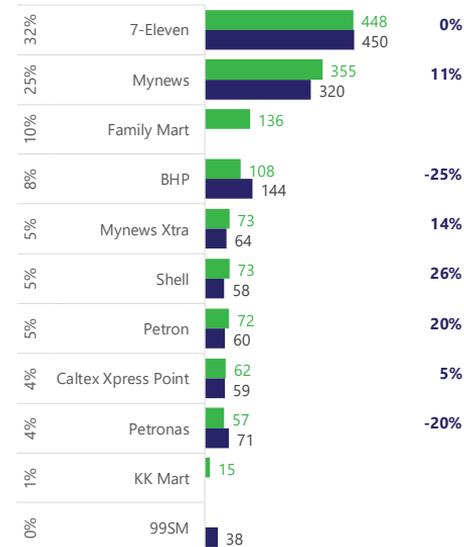
Mailer Features By Retailers



Newspaper Features By Retailers



In-Store Features By Retailers



About 50% of Giant mailer feature were catered for Grocery and only 8% for Household, whereas other retailers had about 11% for Household

In Q2-19, Giant and Aeon Big had minimal features for fresh as compared with others



Guardian was seen to be decreasing in its mailer promo in Grocery, Household and Healthy & Beauty department since Q4-18

Watsons had increased its mailer promo in Grocery and Healthy & Beauty department in Q2-19

Average Mailer Features



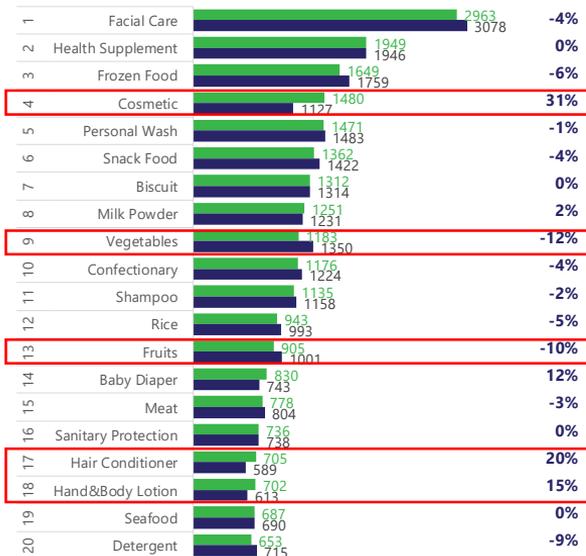
	2018				2019		2018				2019		2018				2019		2018				2019	
	Q1	Q2	Q3	Q4	Q1	Q2	Q1	Q2	Q3	Q4	Q1	Q2	Q1	Q2	Q3	Q4	Q1	Q2	Q1	Q2	Q3	Q4	Q1	Q2
Frequency of Mailer	Monthly						Monthly						Monthly						Monthly					
No. of Mailer Issued	5	3	2	3	4	3	5	5	2	4	4	5	3	2	3	3	4	5	13	9	15	13	13	11
Average No. Of Feature Per Mailer	382	504	500	569	431	557	360	341	488	480	402	352	230	340	155	316	210	183	51	69	64	60	49	79
Grocery	6	20	12	26	12	20	15	20	29	31	18	12	24	24	13	35	21	14	2	4	3	3	2	4
Household	5	5	5	6	9	7	2	1	7	3	2	1	2	4	3	3	4	3						
Health & Beauty	371	478	483	536	409	531	343	320	451	446	382	339	204	312	138	275	184	165	48	65	61	57	47	74
Chilled & Frozen																		1						
Fresh																								
Electrical							1	1					1	1		3	1	1						

Fruits & Vegetables promotion features registered a declined in both mediums whereas categories like Cosmetic, Hair Conditioner and Hand & Body Lotion noted a growth of 15%-31% mailer features vs YAG



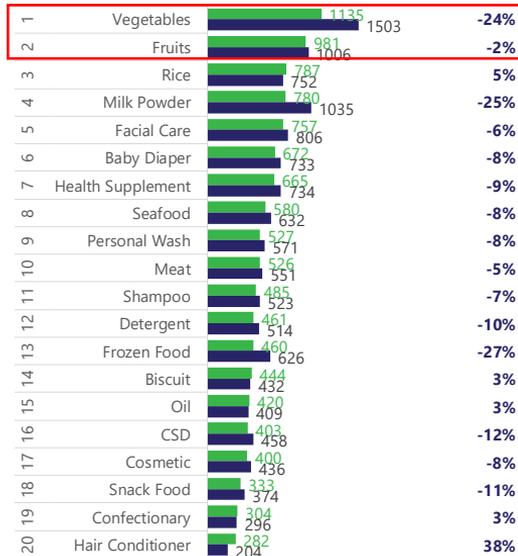
Total Mailer Features

Mailer Features By Categories



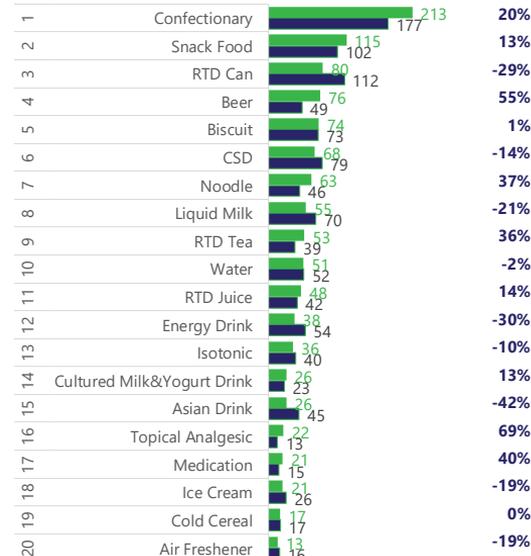
Total Newspaper Features

Newspaper Features By Categories



Total In-Store Features

In-Store Features By Categories



Source: MailerTrack Jan-Jun 2019 vs 2018, Mailer, Newspaper & InStore Excluding Regional Data

Top 3 suppliers (Nestle, Unilever and P&G) mailer features noted minimal growth while their newspaper had declined by 7% to 16%

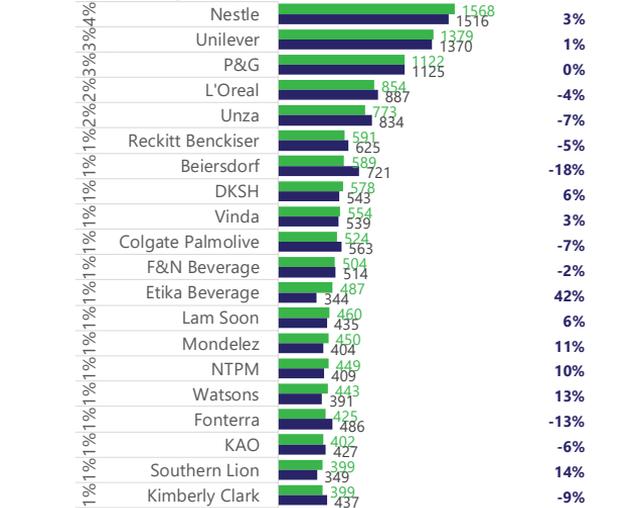
Total category range promotions noted to have tripled in 1H-2019 although overall newspaper features for Range discount declined



Jan-Jun 2018: 42937
Jan-Jun 2019: 42102

Growth: -2%

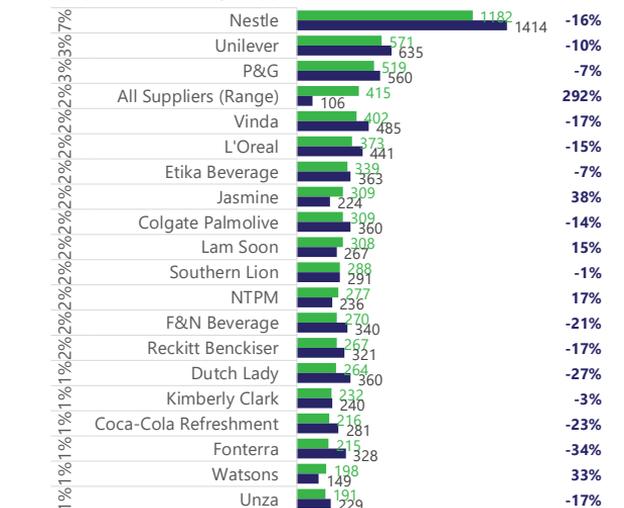
Mailer Features By Suppliers



Jan-Jun 2018: 19811
Jan-Jun 2019: 17623

Growth: -11%

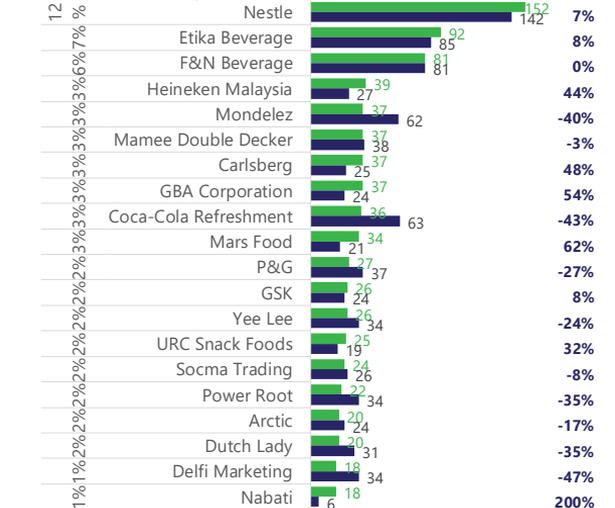
Newspaper Features By Suppliers



Jan-Jun 2018: 1264
Jan-Jun 2019: 1263

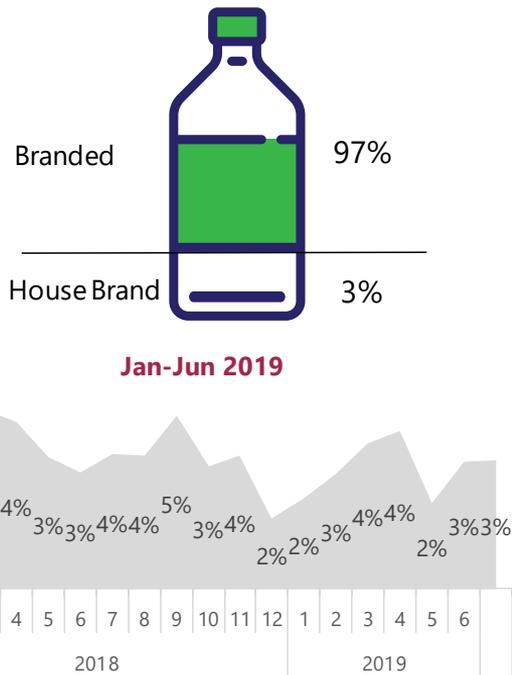
Growth: 0%

In-Store Features By Suppliers



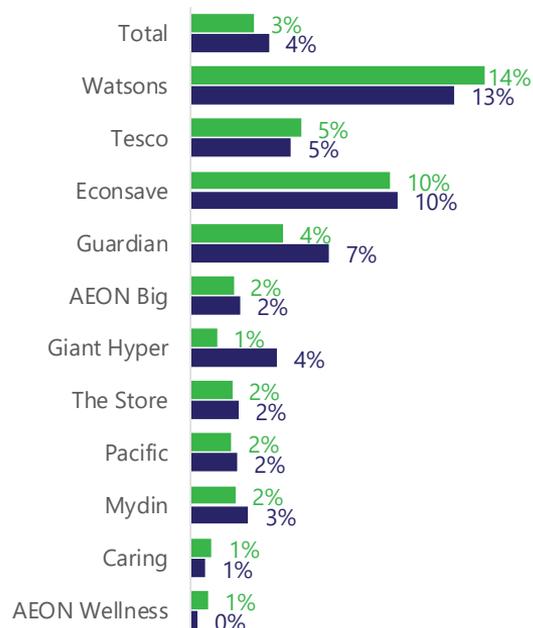
As compared vs YAG, Watsons, Tesco and Caring increased minimally on their House Brand promotion

Guardian and Giant reduced the most on House Brand promotion



House Brand Mailer & Newspaper Contribution %

House Brand Contribution % by Retailer (M&N)



■ Jan-Jun 2019 ■ Jan-Jun 2018

Total Average Basket Price had decreased vs YAG

Frozen Food, Health Supplement, Baby Diaper, Oil and Liquid Milk noted lower basket price vs YAG

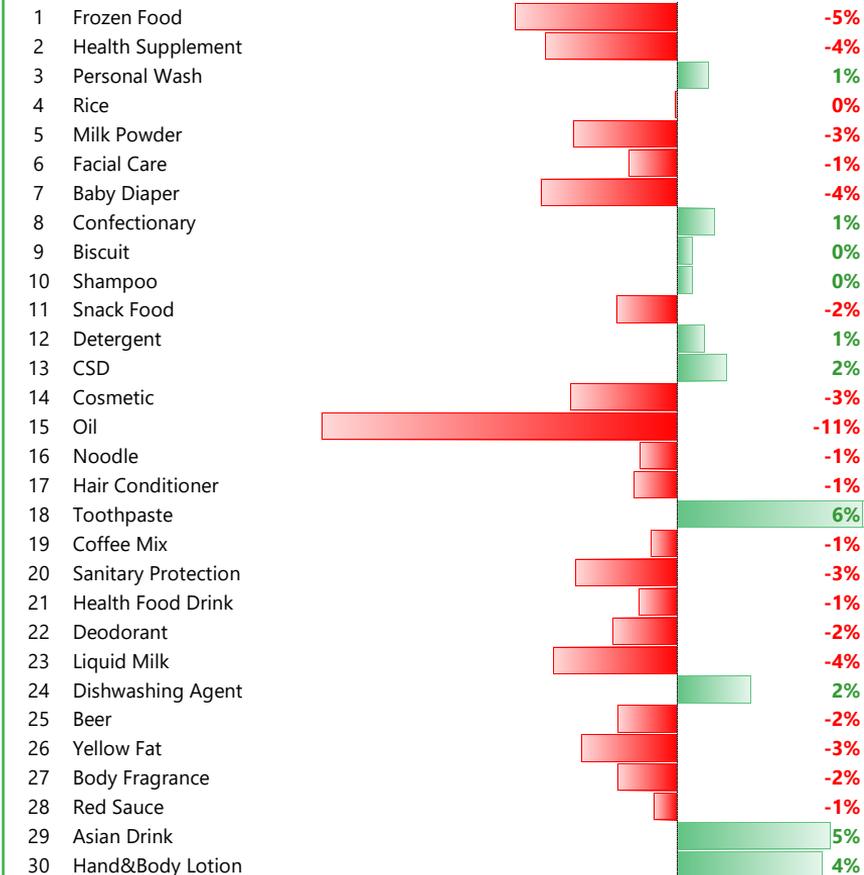


(For Top 10 Matching SKUs for the Top 30 categories)

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

Rank Top 30 Categories

Basket Price for the Top10 Matched Features





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