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# **Report Name:** Food Service - Hotel Restaurant Institutional Annual

**Country:** Indonesia

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**Report Category:** Food Service - Hotel Restaurant Institutional

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**Report Highlights:**

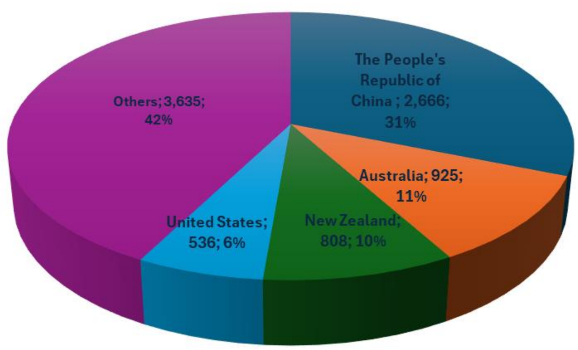
Indonesia's hotel, restaurant, and institutional (HRI) sector reached a value of $29 billion in 2024, surpassing pre-pandemic levels and solidifying its position as the largest foodservice market among Association of Southeast Asian Nations (ASEAN) member states. Key trends include the rapid expansion of specialty coffee shop chains, growth in premium bakery shops, and a booming online food delivery sector, with super-apps like GrabFood, GoFood, and ShopeeFood dominating the market. The sector is characterized by a strong dine-out culture, increasing demand for imported high-quality products, and ongoing expansion of international hotel and restaurant chains, particularly in Jakarta and Bali. However, challenges remain due to complex import regulations, expanded halal certification requirements set to begin in October 2026, and strong competition from regional suppliers such as Australia, New Zealand, and the People's Republic of China.

**Market Fact Sheet: Indonesia**

## Executive Summary

Indonesia is the fourth most populous nation in the world, with a population of approximately 282 million in 2024. Fifty-six percent of the population lives on Java Island, one of the most densely populated areas in the world. In 2024, Indonesia's GDP reached $1,396 billion and GDP per capita reached $4,960 (est.). Indonesia is a major producer of rubber, palm oil, coffee, and cocoa. In 2024, agricultural imports reached $29.6 billion, $8.6 billion of which were consumer-oriented products. Soybeans, animal feed ingredients, dairy products, cotton, and wheat are top imports from the United States. Agricultural self-sufficiency is a stated goal of the Indonesian government and is often used to justify trade barriers and restrictions.

## Top Consumer – Oriented Product Suppliers to Indonesia, 2024 (million USD)




Source: Trade Date Monitor LLC

## Food Processing Industry

The food processing industry is comprised of approximately 8,593 large and medium-sized producers and 1.8 million micro and small-scale producers. Most of the products are consumed domestically (mostly retail) and the market is considered highly competitive.

## Food Retail Industry

Indonesian grocery retail sales reached $101 million in 2024 (with traditional grocery retailers accounting for 73 percent). Retail sales are driven by rising levels of affluence, particularly in urban areas, where a growing number of middle-to upper-income consumers are purchasing higher quality premium products.

## Food Service Industry

The food service sector's total contribution to GDP was about $27.8 billion in 2024. The sector is dominated by small restaurants and street-side restaurants known as *warungs*.

**Quick Facts CY 2024**

**Consumer-Oriented Product Imports:** $8.6 billion
U.S. Share (6%) – $536 million

**Top 10 Growth Products:**

1) cheese
2) baking inputs
3) chocolate products
4) baby food
5) frozen food
6) snacks
7) sauces
8) dressings /condiments
9) sweet biscuits
10) ice cream/frozen desserts

**Food Industry by Channels (USD billion) 2024**

| | |
|---|---|
| Retail Food Industry | $101 |
| Foods E-Commerce | $4 |
| Food Service-HRI | $29 |
| Food Processing | $100 |
| Food and Agricultural Exports | $50 |

**Top 10 Retailers**

Alfamart, Indomaret, Alfa Midi, Hypermart, Transmart / Carrefour, Superindo, Lotte Mart, Circle K, Farmer's Market.

**GDP/Population**

Population (million): 282
GDP: $1,396 billion, GDP per capita: $4,960
Source: Statistics Indonesia (BPS), Trade Data Monitor LLC, and Euromonitor International

## Strength/Weakness/Opportunities/Challenge

| Strengths | Weaknesses |
|---|---|
| Large consumer base with growing incomes; younger consumers seeking new experiences and products. | Inadequate infrastructure, including ports and cold storage facilities, outside of the main island of Java. |
| **Opportunities** | **Challenges** |
| Rapid growth of the retail sector; Japanese, Korean, and Western restaurant chains; bakeries; expanding online sales platforms; and increasing export demand for processed products. | Challenging business climate, onerous and unpredictable regulatory environment with non-transparent import regulations, mandatory halal certification. |

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## SECTION I. MARKET SUMMARY

Indonesia presents excellent business opportunities for international and local foodservice players, with a growing young and working population and the largest food service market among ASEAN countries. In 2024, the Indonesian hotel, restaurant, and institutional sector's value totaled $29 billion, slightly up almost 1 percent from 2023. The value of food service sales also rose in 2024, reaching even higher than pre-COVID-19 pandemic levels. Full-service restaurants accounted for 79 percent of total foodservice sales, followed by fast food (7 percent), cafés/bars (6 percent) and street stalls (5 percent).

Current trends in Indonesia's foodservice industry include:

**Specialty coffee shop chains and cafés**
The number of coffee shop chains in Indonesia has steadily increased since 2018, including during the COVID-19 pandemic. These outlets, popular among middle- and high-income consumers, especially younger generations, typically offer a range of snacks and baked goods alongside beverages. According to Deloitte, the growth of local coffee businesses has been driven by convenience-focused formats such as ready-to-drink bottles and grab-and-go kiosks near malls and transit hubs.

Leading local chains include Kopi Kenangan, which expanded to over 872 outlets in 2024 and entered other Southeast Asian and Oceania markets, and Fore Coffee, which launched the Fore Donut concept and grew from 232 outlets at the end of 2024 to 261 stores by mid-2025. Both brands are recognized for menu innovation, offering chocolate, fruit-based, and blended ice drinks to attract consumers seeking new flavors. This growth reflects their aggressive expansion strategies and strong market momentum.

**Online food delivery**
Indonesia's digital foodservice sector has been growing rapidly and is currently the largest in Southeast Asia in terms of sales. Currently, "super-apps" such as GoFood, ShopeeFood, and GrabFood dominate the delivery service and online orders, expanding into second-tier cities and partnering with popular restaurant chains, including international and local brands.  In 2024, online food and beverage spending in Indonesia reached US$12.9 billion, making it the largest e-commerce category, ahead of electronics and fashion (We Are Social). The food delivery segment generated US$5.4 billion with GrabFood holding a 47 percent market share, followed by GoFood at 35 percent and ShopeeFood at 18 percent[1].

**Bakery shops**
The growth of premium bakery shops in Indonesia offering a wide variety of artisanal breads, desserts, and pastries is driven by millennials and consumers who are increasingly adopting a westernized culinary lifestyle. Premium bakery chains in Indonesia include Paris Baguette, Monsieur Spoon, Union, Paul, Union, Tous les Jours, and The Harvest.

**Fine dining**
Fine dining in Indonesia, particularly in Jakarta, continues to expand, featuring both internationally recognized venues and innovative local concepts. Many establishments combine premium imported ingredients, including U.S. beef, and specialty seafood, with Indonesian produce and flavors. Notable restaurants such as August, Amuz Gourmet, Henshin, Wolfgang's Steakhouse, Bistecca, Su Ma, Iron Plate, Tatemukai Signature Omakase, Namaaz Dining, Basque, and upscale rooftops like Skye Bar & Restaurant and Cloud Lounge highlight Jakarta's growing reputation for sophisticated dining experiences.

[1] https://www.techinasia.com/news/indonesian-online-fb-spending-hits-12-9b-in-2024-report

**Table 1. Indonesia: Advantages and Challenges for U.S. HRI Food Products**

| Advantages | Challenges |
| --- | --- |
| Population of 282 million, 57 percent urbanization, and 47 percent millennials and Gen Z, growing middle class creating strong demand and potential for imported agricultural products. | Competition from similar imported products from Australia, New Zealand, and the People's Republic of China (PRC) which typically enter duty-free under free trade agreements. |
| Consumers are increasingly seeking new and unique products and tastes beyond traditional local cuisines. | Importing products to Indonesia presents challenges due to the country's complex regulatory requirements, such as import licensing for many agricultural products, facility registration for animal products, mandatory halal certification for most food and beverage products, and other non-tariff barriers. |
| International restaurants, hotel chains, boutique hotels, and specialized cafés are increasingly using high-quality imported products such as meat, pork, wine, cheese, fruit, etc. | Animal based products must have an import recommendation from the MoA, product registration from The National Agency for Drug and Food Control (BPOM) as well as an import permit from the MOT. |
| U.S. food products have an excellent reputation and considered high- quality, healthy, and consistently available. | Imported products are more expensive compared to domestic goods. |
| Indonesia has a strong "dine-out" and domestic travel culture. | The availability of U.S. foods is limited to restaurants in first and second tier cities. |

## SECTION II. ROAD MAP FOR MARKET ENTRY

### A. Entry Strategy

There are several well-attended food shows in Indonesia which provide great opportunities to offer new-to-market products and are good first-step market entry venues (see Table 3). In addition, the following reports or websites provide useful information on import regulations, market entry guidance, and import duties:

1. Food and Agricultural Import Regulations and Standards - Annual Report 2024 - This report provides information on Indonesia's import requirements for food and agricultural products.
2. Food and Agricultural Import Regulations and Standards - Export Certificate 2024 - This report provides information on certificates required to export food and agricultural products to Indonesia
3. Exporter Guide 2025 - This is a useful tool for new-to-export companies which provides an overview of the market dynamics and trends and practical tips on doing business in Indonesia.
4. Indonesia's Expanding Halal Standards with Trade Impacts on the Horizon - Provides detailed information on Indonesia's halal certification requirements, which are scheduled to expand to processed products on October 17, 2026.
5. Drivers and Trends of U.S. Agricultural Trade with Indonesia: Opportunities and Challenges – This outlines the various factors driving the U.S. market share in key commodity groups.
6. Guide to Re-selling Containerized Cargo After Arrival - This report provides an overview of the general procedures for re-selling containerized cargo after arrival to Indonesia.
7. Tariffs and FTAs Information - Based on HS code.
8. Approved U.S. establishments: Dairy Products, meat Products.
9. Meat establishment approval guide; pork establishment approval guide; meat establishment questionnaire; pork establishment questionnaire; dairy establishment questionnaire; dairy establishment approval guide.

**Mandatory Halal Certification**
Halal certification will become mandatory for most food, beverages, ingredients, and additives, including all processed food products (domestic and imported) starting on October 17, 2026. It is important for suppliers to determine whether mandatory halal certification applies to their products and, if so, whether halal certification is feasible and cost-effective for their products. The report, [Indonesia's Expanding Halal Standards with Trade Impacts on the Horizon]() provides essential guidance for U.S. exporters on complying with Indonesia's expanding halal certification requirements, including product scope, exemptions, and certification procedures.

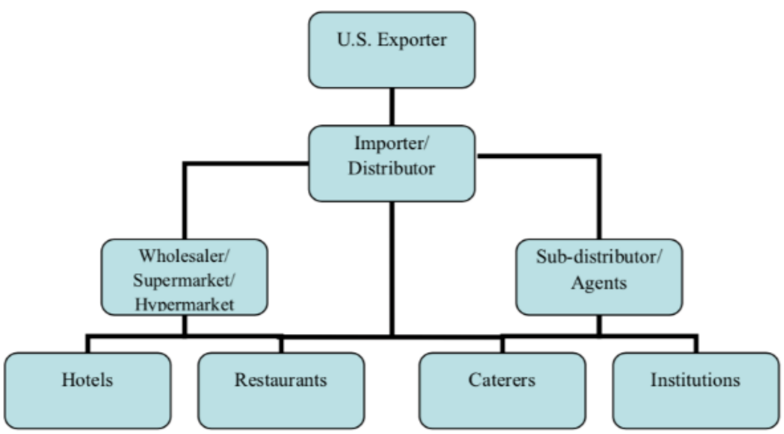
**Table 2. Trade Shows in Indonesia and Singapore**[2]

| Name of Event | Location | Dates of Event | Website |
|---|---|---|---|
| Food and Hotel Asia, Food & Beverage 2026 | Singapore | April 21 - 24, 2026 | https://fhafnb.com/ |
| Food, Hotel & Tourism Bali, 2026 | Bali | April 28 – 30, 2026 | https://www.fhtbali.com/ |
| Food and Hotel Indonesia 2026 | Jakarta | July 21 - 24, 2026 | www.foodhotelindonesia.com |
| Food Ingredients Asia 2026 | Jakarta | September 16 – 18, 2026 | https://www.figlobal.com/asia-indonesia/en/home.html |
| SIAL InterFOOD 2026 | Jakarta | November 4 - 7, 2026 | https://sialinterfood.com/ |

## B. Distribution

Many imported products for the HRI industry enter Indonesia through reputable local importers or distributor agents. They represent imported products, obtain import licenses and permits, understand customs clearance procedures, and distribute products all over Indonesia.

Indonesia: HRI Sector Distribution Channels




## C. Sub-Sector Profile

Jakarta and Bali remain the ideal locations to target the HRI food service sector. These cities are home to many international hotels and restaurants that cater to sizeable expatriate communities, foreign visitors, and high-income consumers. Bali remains the 'trendsetter' in specialized cafés, hotel chains, and restaurants. Other large cities such as Surabaya, Bandung, Medan, Batam, Balikpapan, Lombok, and Makassar also have potential for import growth, supported by large importers with distributor offices in these locations.

[2] Due to its close proximity, many Indonesian importers frequently attend trade shows in Singapore.

**Hotels**
According to Statistics Indonesia (BPS), there were 4,584 star-rated hotels (461,766 rooms) operating across 38 provinces in 2024, representing an 11 percent increase from the previous year. The number of star-rated hotels now exceeds pre-COVID levels. Bali and Java together account for 61 percent of Indonesia's star-rated hotels. Of the total, approximately 11 percent are managed by international hotel chains, 16 percent by national chains, and 72 percent operate independently. While most international hotel chains are concentrated in Jakarta, Bali, Bandung, Surabaya, Yogyakarta, and Medan, many are expanding into secondary cities, driven by infrastructure improvements and the promotion of new tourist destinations.

Major hotel operators in Indonesia include Accor (more than 350 hotels), Archipelago International (more than 150 hotels), Marriott (more than 84 hotels), Swiss-bel hotel (more than 85 hotels), and Hilton (16 hotels).

**Table 3. Number of hotels and rooms in Indonesia, 2020 - 2024**

| Hotel | 2021 | | 2022 | | 2023 | | 2024 | |
|---|---|---|---|---|---|---|---|---|
| | Hotel | Rooms | Hotel | Rooms | Hotel | Rooms | Hotel | Rooms |
| 5 stars | 220 | 45,839 | 244 | 47,859 | 252 | 50,813 | 296 | 55,779 |
| 4 stars | 762 | 112,854 | 752 | 112,494 | 865 | 122,860 | 940 | 159,199 |
| 3 stars | 1,409 | 122,186 | 1,443 | 125,620 | 1,606 | 134,348 | 1,755 | 147,079 |
| 2 stars | 760 | 49,318 | 765 | 48,941 | 862 | 51,868 | 1,079 | 77,614 |
| 1 star | 370 | 14,865 | 559 | 23,919 | 544 | 22,271 | 514 | 21,945 |
| Other | 24,086 | 373,836 | 24,696 | 363,072 | 24,876 | 364,906 | 26,591 | 467,971 |
| Total | 27,607 | 718,898 | 28,800 | 743,276 | 29,005 | 747,066 | 31,175 | 929,587 |

Source: BPS - Statistics Indonesia

**Table 4. International Visitors Arrivals in Indonesia**

| Visitor | 2020 | 2021 | 2022 | 2023 | 2024 |
|---|---|---|---|---|---|
| International | 4,052,923 | 1,557,530 | 5,889,031 | 11,677,825 | 13,902,420 |
| ASEAN | 1,521,447 | 528,226 | 2,408,098 | 4,248,750 | 4,801,694 |
| Asia | 1,592,037 | 904,841 | 1,426,388 | 2,982,663 | 3,847,157 |
| America | 134,072 | 25,073 | 260,095 | 566,883 | 605,684 |
| Europe | 441,179 | 55,906 | 960,410 | 2,000,559 | 2,377,798 |
| Oceania | 297,786 | 35,504 | 722,524 | 1,625,760 | 1,956,767 |
| Other | 66,402 | 7,980 | 111,516 | 253,210 | 313,350 |

Source: BPS - Statistics Indonesia

**Restaurant**
The Indonesian foodservice market is fragmented, with international chains, such as KFC, McDonald's and Pizza Hut, dominating the market. In 2024, these three leading players accounted for just 2 percent of the market, leaving space for expansion and further consolidation.

However, ongoing boycott campaigns related to the Gaza conflict and lingering impacts from the COVID-19 pandemic led to significant closures among international fast-food chains. For example, KFC Indonesia closed approximately 35 outlets in 2024, with closures continuing into 2025. These actions, attributed to post-pandemic recovery challenges, boycotts, and reduced consumer purchasing power, resulted in substantial financial losses and workforce reductions. The closures are part of broader efficiency and restructuring strategies, including relocating some outlets and permanently closing others, as reported in company financial statements.

Most restaurant chains utilize a mix of local and imported products, with cheese, sauces, flavored beverages, and beef items being mostly imported. International chains such as Pizza Hut import their ingredients directly through franchisees and buy from local food ingredient importers.

**Table 5. Top 10 Foodservice in 2023 - 2024**

| No | Restaurant Brand | Category | Sales Value (US$ million) | | Number of Outlet | |
|---|---|---|---|---|---|---|
| | | | 2023 | 2024 | 2023 | 2024 |
| 1 | McDonald's (Rekso Group) | Fast food restaurant | 455 | 331 | 312 | 322 |
| 2 | KFC (Fastfood Indonesia PT, Tbk) | Fast food restaurant | 427 | 328 | 760 | 725 |
| 3 | Pizza Hut (Sarimelati Kencana PT, Tbk) | Fast food restaurant | 256 | 188 | 615 | 593 |
| 4 | Mie Gacoan (Pesta Pora Abadi, PT) | Fast food restaurant | 110 | 181 | 132 | 259 |
| 5 | Hokben (Eka Bogainti PT) | Fast food restaurant | 181 | 176 | 375 | 397 |
| 6 | Starbucks (Sari Coffee Indonesia PT) | Coffee shop | 221 | 163 | 327 | 324 |
| 7 | Champ Resto Indonesia[3] | Full-service restaurant | 94 | 104 | 276 | 271 |
| 8 | Richeese (Nabati Group) | Fast food restaurant | 88 | 99 | 244 | 277 |
| 9 | Kopi Kenangan (Bumi Berkah Boga PT) | Coffee shop | 91 | 90 | 868 | 872 |
| 10 | Chatime (Kawan Lama Sejahtera Group) | Milk & tea shop | 90 | 87 | 464 | 466 |

Source: Euromonitor International and company websites

**Table 6. Sales Value and Outlet Indonesia's Foodservice by Type, 2023 -2024**

| Foodservice Type | Outlet | | Sales Value (US$ million) | |
|---|---|---|---|---|
| | 2023 | 2024 | 2023 | 2024 |
| Full-Service Restaurants | 103,145 | 104,100 | 22,985 | 23,214 |
| Limited-Service Restaurants* | 10,335 | 11,365 | 2,389 | 2,298 |
| Cafés/Bars | 10,140 | 10,867 | 2,039 | 2,039 |
| Street Stalls/ Kiosks | 100,833 | 104,706 | 1,408 | 1,586 |
| Self-Service Cafeterias** | 479 | 476 | 109 | 109 |
| Total | 224,932 | 231,514 | 28,930 | 29,246 |

Note: *Fast Food and Delivery
**Self-Service Cafeterias: ready-to-eat food from food and beverage areas in grocery outlets
Source: Euromonitor International

## Catering

Indonesia's catering industry is comprised of four categories: hospitality (i.e., hotel, weddings, and other events), institutional, online, and in-flight catering. Hospitality, institutional and online catering services are highly fragmented. Services offered in these categories range from five-star hotels and large institutional suppliers to individually run boutique catering businesses and low-cost providers. In-flight catering, institutional (mining and petroleum companies), and international standard catering services mostly use imported foods such as beef, fresh and canned fruit, frozen potatoes, and cheese.

Major catering companies in Indonesia include Pangansari Utama, Aerofood ACS, and Cardig Aero Service Group. Those companies provide international and local menu catering services, mostly to airlines, and industrial and remote catering. Fast-food chains including KFC, McDonald's, Pizza Hut, and Starbucks offer catering packages to customers in Indonesia.

Additionally, beginning in late 2024, the Government of Indonesia (GOI) launched the Free Nutritious Meals Program, aiming to establish 30,000 central kitchens by 2027 to serve 83 million children and pregnant women. By November 2025, 16,503 kitchens (SPPGs) were operational, reaching 47 million beneficiaries and surpassing the initial 2025 target of 5,000 kitchens. The program is expected to support over 1.5 million jobs and create new

[3] PT Champ Resto Indonesia, Tbk. ("Champ Group") is a rapidly expanding restaurant chain in Indonesia, operating eight self-developed brands that offer a wide range of cuisines. These brands include Raa Cha (Suki and BBQ), Gokana (Japanese cuisine), BMK (Indonesian cuisine), Platinum (Western and fusion cuisine), Chopstix (Asian cuisine), Monsieur Spoon (bakery and café), Dewata by Monsieur Spoon (Indonesian fine foods), and Croro by Monsieur Spoon (bakery and café). Together, these brands reflect the group's focus on multicultural dining experiences.

opportunities for the food and beverage sector. While meals will primarily use local ingredients, imported products, including those from the United States, will be included when local supply is unavailable or insufficient.

## SECTION III. COMPETITION

In 2024, Indonesia imported $536 million in U.S. consumer-oriented agricultural products, a 13 percent decrease from 2023, primarily due to reduced imports of U.S. dairy and fruit largely due to reduced consumer purchasing power. Despite this decline, Indonesia's total consumer-oriented agricultural imports increased from $8.3 billion in 2023 to $8.6 billion in 2024. The leading suppliers were Brazil, Australia, the United States, PRC, and India. U.S. consumer-oriented agricultural exports to Indonesia are projected to decline by approximately 20 percent in 2025, with the largest decreases expected in whey, skim milk powder, and beef. Conversely, cheese imports are forecast to rise following new approvals for U.S. cheese-processing plants; cheese imports have already increased by about 30 percent in value through October 2025 compared to the previous year. For additional information on the trends related to U.S. dairy products, please refer to FAS Jakarta's Dairy and Products Annual report.

U.S. products are recognized for their quality and reliability but face strong competition from PRC in fresh fruit and from Australia and New Zealand in dairy, beef, and fresh fruit. Indonesian importers continue to prefer consolidated shipments from multiple suppliers to maximize cost efficiency.

**Table 7. Competitive Situation for Selected Imported Consumer-Oriented Products in the Foodservice Market, 2024, (USD million), metric tons (MT)[4]**

| Product Category | Major Supply Sources | Strengths of Key Supply Countries | Local Market Situations |
|---|---|---|---|
| Cheese<br>● Total imports: $148 million/ 28,123 MT<br>● From USA: $18 million/ 3,5905,202 MT | 1. New Zealand (41%)<br>2. Australia (21%)<br>3. USA (12%) | New Zealand and Australia enjoy preferential tariff treatment under the AANZFTA agreement. Both countries also enjoy geographic proximity and lower transportation costs compared to the United States. | Local cheese production is dominated by processed cheeses, while the majority of QSR and premium restaurants use imported cheese such as mozzarella and cheddar. |
| Fresh fruit<br>● Total imports: $1.5 billion/ 700,000 MT<br>● From USA: $34 million/ 11,502 MT | 1. PRC (72%)<br>2. Australia (9%)<br>3. Thailand (7%)<br>4. USA (2%) | ● PRC offers competitive prices for apples, pears, mandarins and grapes, which account for 94% of Chinese fresh fruits exports to Indonesia.<br>● Major suppliers such as PRC, Australia and Thailand have duty-free access or lower tariff under FTAs. | Tropical fresh fruits dominate local production with inconsistent supply and quality. |
| Beef & beef products<br>● Total imports: $806 million/ 239,255MT<br>● From USA: $89 million/ 14,904MT | 1. Australia (61%)<br>2. India (17%)<br>3. USA (11%) | ● Australia has geographic proximity and competitive pricing advantages. The market opened for boneless meat from India (buffalo meat) in 2016 and Brazil in 2019 as an effort to stabilize beef prices, mostly sold through wet markets and mid-range supermarkets.<br>● New Zealand and Australia enjoy preferential tariff treatment under the AANZFTA agreement. | Due to constant shortages of domestic supply, the food service sector relies on imports. Increasing numbers of Korean, Japanese BBQ, and steak-house restaurants are driving up sales of imported beef. |

[4] The selected imported consumer-oriented products listed above demonstrate promising potential for U.S. products in the Indonesian foodservice market.

| | | | |
|---|---|---|---|
| Seafood products<br>● Total imports: $480 million/ 307,005MT<br>● From USA: $50 million/ 11,578MT | 1. PRC (18%)<br>2. Norway (10%)<br><br>3. USA (9%) | PRC supplies mackerel, crab, and tuna at competitive prices. U.S. seafood exports to Indonesia rose by 50 percent in 2024, driven by higher shipments of black cod, pollock, and salmon. This growth trend is expected to continue in 2025. | Indonesia is one of the largest producers and exporters of tuna and shrimp in the world. But imported crab and salmon dominate consumption in premium restaurants. |
| Pork & pork products<br>● Total imports: US$3019 million/ 4,875MT<br>● From USA: US$10 million/ 712MT | 1. Denmark (46%)<br>2. USA (32%)<br>3. PRC (15%)<br>4. Spain (6%) | PRC mostly offers canned pork for retail consumption, while Denmark and Spain offer frozen pork meat with competitive prices compared to the United States. | Local production is available in Bali, but premium restaurants rely on imported pork products. |
| Wine<br>Total imports: US$14 million<br>From USA: US $0.6 million | 1. France (26%)<br>2. Italy (20%)<br>3. Australia (19%) | Australian wine is well known for its quality and offers a wide variety of brands in the market. French wine is considered as premium quality with a higher average price. Italy and Chile rolled out a strong promotional campaign for their wine during and after the COVID-19 pandemic. | Limited local production is centralized in Bali with few brands in the market. The food service sector remains the largest distribution channel and relies on imported brands. |

Source: Trade Data Monitor LLC, Market share based on value.

## SECTION IV. BEST PROSPECTS FOR U.S. CONSUMER-ORIENTED PRODUCT EXPORTS TO INDONESIA

**Top Consumer-Oriented Products Imported from the World:**
Butter; cheese; grapes; apples; pears; beef; French fries; cocoa powder.

**Top Consumer-Oriented Products Imported from the United States:**
Milk/cream powder; beef & beef products; cheese; apples; grapes; French fries; flavoring; almonds; cocoa powder; potato flakes; pork; dog & cat food.

**Products Not Present in Significant Quantities, but with Good Sales Potential**
Wine; cherries; blueberries; snacks; breakfast cereals.

**Products Not Present Because They Face Significant Import Barriers**
Poultry and eggs; beef and dairy products from plants not yet approved by the Indonesian government. In addition, the approved import quota for beef, corn, seafood, and fruit has not been sufficient to meet market demand, limiting the resulting import quantities.

## SECTION VI. KEY CONTACTS AND FURTHER INFORMATION

**Links to Government Sources:**
Statistics Indonesia; Bank Indonesia

**Government Regulatory Agency Contacts:**
Ministry of Agriculture; Ministry of Trade; the Indonesian Food and Drug Authority (BPOM); Dairy and Meat Approval Directorate General of Livestock and Animal Health Services; Animal/Plant Quarantine and Inspection Indonesian Agricultural Quarantine Agency; Indonesia's Halal Product Assurance Agency (BPJPH).

| | |
|---|---|
| Agricultural Affairs Office<br>Physical Address: U.S. Embassy Jakarta, Jl. Medan Merdeka Selatan 5, Jakarta 10110, Indonesia<br>http://www.fas.usda.gov or www.usda-indonesia.org | Phone: +62 21 50831162<br>Email: AgJakarta@usda.gov |

**Attachments:**

No Attachments