Required Report: Required - Public Distribution

Date: July 03, 2026

Report Number: ID2026-0025

Report Name: Exporter Guide Annual

Country: Indonesia

Post: Jakarta

Report Category: Exporter Guide

Prepared By: Novi Yuningsih

Approved By: Kristina Schammel

Report Highlights:

Indonesia, Southeast Asia's largest economy and fourth most populous country, offers significant opportunities for U.S. agricultural exporters, supported by a population of 284 million, 5.1 percent economic growth, and strong demand for imported food products. Indonesia imported $26 billion in agricultural products in 2025, including $9.2 billion in consumer-oriented products, while the United States remained the fourth-largest agricultural supplier. Growth in modern retail, foodservice, e-commerce, specialty coffee and tea chains, bakery cafés, and the government's Free Nutritious Meals Program is driving demand for dairy products, beef, fresh fruit, frozen potatoes, snack foods, and other value-added food products. Despite challenges related to import licensing, halal certification requirements, and competition from free trade agreement partners, Indonesia remains one of the most promising markets in Southeast Asia for U.S. consumer-oriented and food ingredient exports.

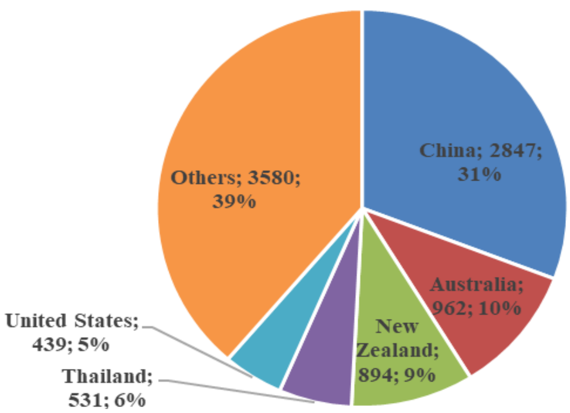
Post: Jakarta

Market Fact Sheet: Indonesia

Executive Summary

Indonesia is the fourth most populous nation in the world, with a population of approximately 284 million in 2025. Fifty-six percent of the population lives on Java Island, one of the most densely populated areas in the world. In 2025, Indonesia's GDP reached $1,443 billion and GDP per capita reached $5,083.4 (est.). Indonesia is a major producer of rubber, palm oil, coffee, and cocoa. In 2025, agricultural imports reached $26 billion, consisting of $9.2 billion in consumer-oriented products. Soybeans and dairy are the 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.

Consumer-Oriented Agricultural Imports, 2025 (million USD)



Source: TDM

Food Processing Industry

The food processing industry is comprised of approximately 8,084 large and medium-sized producers; 2.1 million are considered 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 $102 billion in 2025 (traditional grocery retailers held 76 percent of the market share). 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 premium products.

Food Service Industry

The foodservice sector's total GDP contribution totalled nearly $30 billion in 2025. The sector is dominated by small restaurants and street-side restaurants (*warungs)*.

Quick Facts CY 2025

Consumer-Oriented Product Imports: $9.2 billion

U.S. Share (5%) – $439 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 dessert

Food Industry by Channels (U.S. billion)

Processed Food Export	$49
Processed Food Import	$6
Modern Grocery Retail	$24
Food Service	$30
Food E-commerce	$5
Traditional Market (small local grocers)	$77

Top 10 Retailers

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

GDP/Population 2025

Population (million): 284

GDP: $1,443 billion, GDP per capita: $5,083.4

Source: Statistics Indonesia (BPS), Trade Data Monitor LLC, and Euromonitor International

Strengths/Weaknesses/Opportunities/Challenges

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; unpredictable regulatory environment; import quotas; onerous facility registration and import requirements and processes.

Contact: FAS Jakarta, Indonesia

AgJakarta@usda.gov / www.usda-indonesia.org

SECTION I. MARKET OVERVIEW

Indonesia remains Southeast Asia's largest economy and the world's fourth most populous country, with approximately 284 million people in 2025. Economic growth reached 5.1 percent in 2025, supported by resilient household consumption, urbanization, and continued investment. Millennials and Generation Z account for nearly half of the population and are increasingly influencing food purchasing decisions, particularly for convenience, health-oriented, and premium products. While Indonesia's middle class declined from 47.9 million in 2024 to 46.7 million in 2025[1], the aspiring middle class grew by 4.5 million since 2024 and now represents more than half of the population. This segment comprises households that have escaped extreme poverty but have not yet reached established middle-class status, and it represents a large, growing consumer base seeking affordable premium products and modern food experiences.

Despite ongoing pressure on purchasing power from rising living costs, demand for food and beverages remains resilient. Growth continues to be driven by modern retail expansion, e-commerce, convenience stores, specialty coffee and tea chains, bakery cafés, and foodservice outlets. Consumers are increasingly seeking products that offer convenience, quality, health benefits, and value, creating opportunities for imported consumer-oriented products including dairy, fresh fruit, beef, snacks, bakery ingredients, and other premium food and beverage products. However, regulatory barriers, import licensing requirements, and mandatory halal certification remain important considerations for market entry and expansion.

Table 1. Indonesia: Key Economic Data

	2021	2022	2023	2024	2025
Economic Growth (%)	3.70%	5.30%	5.10%	5%	5.1%
GDP (billion $)	1,186	1,319	1,371	1,396	1,443
Inflation (%)	1.9	5.5	2.6	1.6	2.9
Unemployment (%)	6.5	5.9	5.3	4.9	4.8
Population (million)	273	276	279	282	284

Source: Statistics Indonesia 2026 - Central Bureau of Statistics, Indonesia (BPS)

Table 2. Indonesia: Advantages and Challenges

Advantages	Challenges
Positive economic growth (5.1 percent in 2025) and rising GDP per capita continue to support demand for imported food and beverage products.	Complex import licensing procedures, facility registration requirements, and other non-tariff barriers can create uncertainty and delays for importers.
Indonesia is Southeast Asia's largest economy, with a population of approximately 284 million and a growing aspiring middle class representing more than half of the population.	U.S. consumer-oriented products face strong competition from Australia, New Zealand, the People's Republic of China (PRC), ASEAN suppliers, Japan, and South Korea, many of which benefit from preferential tariff

[1] Mandiri Institute 2025

	treatment.
Modern grocery retailers, premium supermarkets, convenience stores, and e-commerce platforms continue to expand beyond major urban centers, increasing access to imported products.	Mandatory halal certification requirements and associated compliance costs remain a challenge for some U.S. exporters.
Foodservice channels, including specialty coffee chains, tea chains, bakery cafés, quick-service restaurants, and premium dining establishments, continue to expand and increase demand for imported ingredients and consumer-oriented products.	Indonesia's agricultural self-sufficiency policies can result in regulatory measures that restrict imports of certain agricultural products.
Indonesia does not produce sufficient quantities of dairy products, beef, fresh fruits, tree nuts, wheat, and other feed and food ingredients, creating continued import demand.	Import licensing requirements for horticultural, beef, dairy products and periodic reviews of market access measures can create supply uncertainty.
U.S. food products maintain a strong reputation among Indonesian buyers for quality, consistency, food safety, and innovation.	Competition from Australia and New Zealand remains particularly strong in dairy, beef, and horticultural products due to lower tariffs and shorter shipping times.

SECTION II. EXPORTER BUSINESS TIPS

Market Research

Contact information for Indonesian importers is often not publicly available, and many operate multiple affiliated companies to streamline customs clearance. U.S. exporters seeking market entry support or buyer leads can contact FAS Jakarta directly or engage local or regional USDA Cooperators for additional market intelligence. The exporter guide video series also provides step-by-step compliance guidance for processed food, dairy, and meat products — offering a practical roadmap for navigating Indonesia's regulatory requirements efficiently.

It is critical to conduct due diligence on importers before doing business, especially for first-time buyers. Indonesian Customs regulations make it very difficult to re-sell or re-export products that have arrived at Indonesian ports. Any change to the consignee requires approval from the original consignee. It is recommended that secure payment terms, such as a Letter of Credit, be used to the extent possible.

Starting October 17, 2026, halal certification becomes mandatory for a wide range of ingredients, additives, and all processed food products, both domestic and imported. U.S. exporters should first determine whether their products fall within scope (refer to Ministry of Religious Affairs Decree No. 748/2021 and assess the feasibility and cost of certification. Certification can be obtained through a U.S. Halal Certifying Body (HCB) accredited by Indonesia or directly through the Indonesian Halal Authority (BPJPH). A full list of accredited U.S. HCBs is available in GAIN Report ID2024-0005. For comprehensive guidance on product scope, exemptions, and certification procedures, see the

GAIN report Indonesia's Expanding Halal Standards with Trade Impacts on the Horizon. FAS Indonesia has also developed short, practical videos addressing two key questions, "Does my product need halal certification?", and "How do I get certified halal?". The videos are available at Halal – USDA Indonesia.

Table 3: Trade Shows in Indonesia and Singapore

Name of Event	Location	Date of Event	Website
Food and Hotel Indonesia 2025	Jakarta	21 - 24 July 2026	www.foodhotelindonesia.com
Food Ingredients Asia 2026	Jakarta	16 - 18 September 2026	https://www.figlobal.com/asia-indonesia/en/home.html
SIAL InterFOOD	Jakarta	4 - 6 November 2026	https://sialinterfoodindonesia.com/
Food & Hotel Asia 2027 (Food & Beverage)	Singapore	20 – 23 April 2027	https://foodnhotelasia.com/

Local Business Practices and Customs

U.S. exporters should be aware of the following business culture in Indonesia:

- Business deals can take longer to confirm as buyers prefer to build a good relationship before doing business.
- Buyers may be slow to respond to unsolicited e-mails, particularly from unknown suppliers. Face-to-face meetings, trade shows, and introductions through trusted business contacts can help establish credibility.
- Flexible meeting arrangements. Meeting schedules may be subject to change.
- Buyers may communicate indirectly. Saying "yes" or nodding does not necessarily mean they agree as culturally Indonesians prefer not to say anything negative.
- Indonesia has many different ethnic groups, but the Javanese are the largest ethnic group in the country. However, ethnic Chinese Indonesians operate many businesses in Indonesia.
- The Muslim holiday of Eid al-Fitr is the longest annual holiday in Indonesia. During the preceding month of Ramadan, most Indonesians fast and the pace of business slows.
- Giving gifts is a common practice when building business relationship especially during festive occasions (e.g., Eid al-Fitr, Christmas, Chinese New Year).
- It is not common to refer to someone by their first or last name. Indonesians instead often use courtesy titles such as Mr./Mrs. (Bapak/ Ibu).
- Batik is the national cloth, and many businessmen wear it as daily attire instead of a suit and tie.
- Digital communication plays an important role in Indonesia. According to the Digital 2026 report, Indonesia has more than 230 million internet users and approximately 180 million social media user identities. WhatsApp remains the most widely used messaging platform and is often the preferred communication channel for business discussions, product inquiries, and follow-up with buyers.
- Food retailers, foodservice companies, and wholesalers do not typically buy imported products directly. Instead, they work with either dedicated or specialized local importers.
- Importers must have an import license and import identification number before they are allowed to import certain food products into Indonesia, including dairy, beef, and horticultural products.

General Consumer Tastes and Trends

- Japanese, Korean, and Western cuisines continue to gain popularity in Indonesia, driving demand for high-quality imported beef, seafood, dairy products, and food ingredients through restaurants, cafés, and premium foodservice establishments.
- Demand for premium baked goods has increased, requiring high-quality ingredients which are often imported (e.g., dairy products, dried fruits, nuts). Upscale bakery-café chains such as Paris Baguette, Tous Les Jours, and Monsieur Spoon continue to expand their stores in Indonesia to cater to rising middle-class consumer preferences for premium café-style bakeries.
- Specialty coffee and tea chains, including Kopi Kenangan, Tomoro Coffee, Fore Coffee, CHAGEE, and HEYTEA, are expanding rapidly and driving demand for dairy ingredients such as milk, cream, cream cheese, butter, and flavored ingredients.
- Traditional and modern snack foods are popular in Indonesia and are increasingly combined with western styles by adding products such as cheese, premium beef, dried fruits, and nuts (e.g., almonds, raisins).
- Demand for healthy food is increasing, particularly among middle-to-upper income consumers. These consumers are well-educated and have easy access to information. Consumers are increasingly concerned about food additives, MSG, fat, sugar, salt, and preservatives in packaged food.
- Convenience stores are growing rapidly compared to other channels. These stores provide a wide range of food and beverage items e.g., ready-to-eat meals, ready-to-drink juice, coffee, milk, cheese, ice cream, confectionary products, baked goods, and packaged fresh fruit.
- Smaller package sizes are often preferred due to convenience, price considerations, and body weight concerns.
- During both Muslim and Chinese holiday seasons, consumer spending increases. The most important holiday seasons are Ramadan (i.e. the month-long Muslim fasting period in which food consumption goes up significantly), Eid al-Fitr (the Muslim celebration at the end of Ramadan), and Chinese Lunar New Year. Indonesians consume significantly greater amounts of flour, sugar, eggs, baking ingredients, poultry, meat, cheese, cakes, cookies, pastries, nuts, and fresh and dried fruits during these holidays.
- According to the Digital 2026 report, Indonesia has more than 230 million internet users and approximately 180 million social media user identities. Indonesia ranks among the world's largest social media markets, particularly for YouTube, Instagram, TikTok, Facebook, and X. Social media platforms play an increasingly important role in shaping food trends, promoting new products, influencing consumer purchasing decisions, and driving demand for imported food and beverage products.

SECTION III. IMPORT FOOD STANDARDS & REGULATIONS / IMPORT PROCEDURES

Please see the below links for information on import procedures, regulations, tariffs, approved U.S. establishments and retail products:

- Indonesia: Food and Agricultural Import Regulations and Standards (FAIRS) Country Report 2025 - This report provides detailed information on Indonesia’s regulations and standards for imported food and agricultural products.

- Indonesia: Food and Agricultural Import Regulations and Standards - Certificates 2025 - This report provides detailed information on required certificates for the importation of food and agricultural products to Indonesia.
- BPJPH Mandates Registration of Foreign Halal Certificates for Imports
- Tariffs and FTA Information - Based on HS Code

SECTION IV. MARKET SECTOR STRUCTURE AND TRENDS

Top 5 Consumer-Oriented Products for Growth

Dairy Products
Indonesia remains highly dependent on imported dairy products to meet domestic demand, particularly for milk powders, whey products, lactose, cheese, butter, and cream. While the government continues to encourage domestic milk production through dairy herd expansion and the Free Nutritious Meals Program, local supply remains insufficient to meet the needs of food manufacturers, foodservice operators, and consumers. Strong growth in bakery cafés, specialty coffee and tea chains, quick-service restaurants, and Western-style dining concepts is increasing demand for dairy ingredients, particularly cheese, cream, and butter. Cheese represents one of the fastest-growing dairy categories in Indonesia, driven by expanding applications in bakery products, pizza, burgers, snacks, beverages, and foodservice menus. U.S. cheese exports to Indonesia increased significantly in 2025 following the approval of additional U.S. cheese facilities and growing demand for mozzarella, cheddar, cream cheese, and other specialty cheeses. Although competition from Australia and New Zealand remains strong due to preferential tariff treatment and geographic proximity, Indonesia continues to offer opportunities for U.S. dairy products, particularly cheese, whey products, lactose, and other value-added dairy ingredients. For additional information, please refer to Post's most recent Dairy and Products Annual report.

Beef
Indonesia remains highly dependent on imported beef and beef products to supplement domestic production, importing approximately $1.05 billion worth of beef and beef products in 2025. Australia remains the dominant supplier, followed by India and Brazil. The United States ranks fourth by value, with Indonesia importing approximately $30.6 million worth of U.S. beef and beef products, totaling 5,929 metric tons in 2025.U.S. beef is positioned as a premium product and is primarily sold through modern retail channels, hotels, steakhouses, Japanese and Korean restaurants, premium burger chains, and Western-style foodservice outlets. Demand for high-quality beef continues to be supported by the growing popularity of Japanese yakiniku, Korean BBQ, steak restaurants, and premium dining concepts in major urban centers. In addition to chilled and frozen beef cuts, U.S. exports include variety meats used in processed products and foodservice applications. Although local beef production remains insufficient to meet demand, U.S. beef faces strong competition from Australia, New Zealand, Brazil, and Indian buffalo meat due to preferential tariff treatment, shorter transit times, and lower prices. Nevertheless, opportunities remain for U.S. exporters targeting Indonesia's growing premium foodservice sector and consumers seeking high-quality grain-fed beef products.

Fresh Fruits
Although Indonesia grows a wide range of tropical fruits, fruit consumption rate remains low at 88.5 grams per person per day, below the World Health Organization's recommended daily intake[2]. However, increasing health awareness, urbanization, and demand for nutritious foods continue to support consumption of fresh fruits, especially in urban areas. Online purchases of fresh fruits emerged during the COVID-19 pandemic and have continued.

In 2025, Indonesia's fresh fruit imports reached a record $1.88 billion, representing an increase of approximately 25 percent from 2024. Imports are dominated by grapes, pears, apples, and citrus fruits, which account for the majority of imported fresh fruit sales. The PRC remained the dominant supplier, accounting for nearly three-quarters of Indonesia's fresh fruit imports and benefiting from competitive pricing, year-round supply, and duty-free access. Other popular imported fruits include kiwis, plums, and tropical fruits (e.g. longan). Imported fresh fruits are widely available through supermarkets, hypermarkets, specialty fruit retailers, e-commerce platforms, and convenience stores in ready-to-eat formats.

The United States was Indonesia's fourth-largest fresh fruit supplier in 2025, with imports valued at approximately $43 million, led by apples, grapes, citrus, and other premium fruits. Demand for imported fresh fruit such as oranges, mandarins, and grapes usually increases significantly during the Chinese Lunar New Year and Eid al-Fitr festivals. However, significant regulatory challenges remain, particularly uncertainty surrounding the import license process. Delays in the approval of import recommendations and import licenses for horticultural products can disrupt supply planning and cause importers to miss peak seasonal demand periods.

Snack Foods
Modern retailers report strong demand for snack foods across Indonesia, with imported products primarily sold through supermarkets, hypermarkets, premium grocery stores, convenience stores, and e-commerce platforms. Snacking and gifting remain deeply embedded in Indonesian culture, while the expansion of premium retailers such as Ranch Market, Farmers Market, Grand Lucky, Kem Chicks, AEON, and The FoodHall continues to create opportunities for imported snack products. Although savory snacks dominate the market, demand is growing for healthier options such as nuts, dried fruits, trail mixes, granola, protein snacks, and vegetable-based products, driven by increasing health awareness and social media influence. Domestic manufacturers such as Mayora Indah, Garudafood, and Unilever Indonesia remain market leaders, while PepsiCo's $200 million investment and commencement of local production of Lay's, Cheetos, and Doritos in 2025 underscore confidence in Indonesia's long-term snack food market. At the same time, Korean and Japanese snack products are gaining popularity among younger consumers through modern retail and online channels.

Processed Vegetables
French fries are Indonesia's leading imported processed vegetable product, with imports reaching approximately $115 million in 2025, driven by strong demand from fast-food restaurants, cafés, and foodservice operators and limited domestic production of processing-grade potatoes. The PRC became the largest supplier in 2025, with imports exceeding $46 million, supported by its zero-tariff advantage under the Regional Comprehensive Economic Partnership Agreement (RCEP), while the

[2] https://en.tempo.co/read/1492623/indonesias-fruit-consumption-rate-still-below-who-standard-jokowi

United States ranked second with imports valued at approximately $18.6 million, and remains well regarded for the quality and consistency of its frozen potato products. In addition to frozen french fries, Indonesia imports significant volumes of cassava starch, dried onions, and potato starch for food processing and foodservice applications.

Other Primary Ingredients

Primary ingredients such as wheat, soybeans, corn, and refined sugar are in high demand and largely imported. Local production of these products is not sufficient to fulfil industry needs, and products such as wheat are not grown domestically. Production of wheat flour-based food is supplied entirely by wheat imports.

Market Sector Structure

Agricultural imports are required to be conducted by general importers/distributors and producer importers. Retailers and food service operators cannot import directly; thus, they procure imported products from importers or distributors, and from food processing companies.

Retail Sector

Indonesia's retail food market exceeded $100 billion in 2025, supported by a population of 284 million, rapid urbanization, expanding digital adoption, and growing demand for convenient, healthy, and premium food products. While purchasing power pressures have reduced the size of the middle class, the aspiring middle class now represents more than half of the population and continues to drive consumption of affordable premium products. Traditional markets still account for approximately 73 percent of grocery sales but are gradually losing market share to convenience stores, specialty retailers, and e-commerce platforms. Convenience stores, led by Indomaret and Alfamart, now exceed 48,000 outlets nationwide, while premium retailers such as Ranch Market, Farmers Market, Grand Lucky, Kem Chicks, The Foodhall, and Pepito continue to expand their imported product offerings. These trends create opportunities for U.S. exporters, particularly in cheese, fresh fruit, beef, frozen foods, snacks, condiments, and other value-added products, despite challenges related to import regulations, infrastructure constraints, and mandatory halal certification requirements. For additional information, please see: Indonesia: Retail Foods Update 2025

Food Processing Sector

Indonesia's $101 billion food processing industry remains highly dependent on imported ingredients, creating opportunities for U.S. exporters of soybeans, dairy ingredients, cheese, whey products, wheat, sweeteners, tree nuts, fruit ingredients, and other value-added food products. Growth is driven by urbanization, rising demand for convenience foods, expanding foodservice channels, and the government's Free Nutritious Meals Program, with strong demand in categories such as dairy products, cheese, snacks, beverages, baking ingredients, and frozen foods. The United States is Indonesia's fourth-largest agricultural supplier with an 11 percent market share and maintains a strong position in soybeans, wheat, and dairy products. Large food processors such as Indofood, Mayora Indah, Nestlé Indonesia, Frisian Flag Indonesia, and Sarihusada (Danone) continue to drive demand for imported ingredients, while recent investments by Dali Foods, Eastroc Beverage Group, and Bel Group highlight continued confidence in Indonesia's food processing sector and growing demand for processed foods and dairy products, particularly cheese. Please see the Food Processing Ingredients 2026 report for further information.

Foodservice Sector

Indonesia's foodservice industry reached approximately $30 billion in 2025, making it the largest in Southeast Asia. Growth is driven by urbanization, a large young population, rising tourism, increasing workforce participation, and a strong dine-out culture. While international chains such as McDonald's, KFC, and Pizza Hut remain important players, local brands including Kopi Kenangan, Fore Coffee, Mie Gacoan, Richeese Factory, and Tomoro Coffee are expanding rapidly. Key growth segments include specialty coffee shops, premium bakery cafés, online food delivery, catering services, and fine dining restaurants. Opportunities for U.S. exporters include cheese, beef, frozen potatoes, fresh fruit, seafood, wine, tree nuts, dairy products, and foodservice ingredients, particularly as demand grows from Western-style restaurants, Japanese and Korean BBQ concepts, specialty cafés, premium bakeries, and the government's Free Nutritious Meals Program. However, exporters face challenges including import licensing requirements, mandatory halal certification beginning October 17, 2026, and strong competition from suppliers benefiting from free trade agreements. Jakarta and Bali remain the primary entry points for imported food products, although opportunities are expanding in Surabaya, Bandung, Medan, Makassar, Lombok, and other secondary cities. Please see the Indonesia: Foodservice - Hotel Restaurant Institutional 2025 report for further information.

SECTION V. AGRICULTURAL AND FOOD IMPORTS

Indonesia remains one of the world's largest agricultural import markets, with imports of agricultural, fish, and forestry products reaching approximately $25.8 billion in 2025. Demand is supported by a population of 284 million people, a large food processing sector, growing foodservice industry, and continued reliance on imports for key commodities and food ingredients.

In 2025, the United States remained Indonesia's fourth-largest agricultural supplier, accounting for approximately 11 percent of total agricultural imports. Soybeans continue to be the leading U.S. agricultural export to Indonesia, followed by wheat, dairy ingredients, feed ingredients, cotton, and other food processing inputs. The United States maintains a strong position as a reliable supplier of high-quality agricultural commodities and food ingredients that support Indonesia's food processing, feed, and foodservice sectors. Meanwhile, the PRC became Indonesia's largest agricultural supplier in 2025, with imports reaching nearly $3.9 billion. Growth was driven primarily by increased imports of fresh fruit, including grapes, pears, apples, and mandarins, as well as garlic, food ingredients, and other consumer-oriented products.

Brazil was Indonesia's largest agricultural supplier in 2023 due to surging exports of cane sugar and feed ingredients, but it fell to third place in 2025 as sugar imports normalized and demand shifted toward other suppliers. Despite increased competition from the PRC, Brazil, Australia, and other suppliers benefiting from preferential tariff treatment, opportunities remain for U.S. exporters of value-added products, particularly cheese, dairy ingredients, food processing ingredients, tree nuts, fresh fruit, and premium consumer-oriented products.

Table 4. Indonesia: Agricultural Imports

Indonesia Imports (US$ '000)	Imports from the World					Imports from the U.S.					U.S. Market Share (2025)
	2021	2022	2023	2021	2025	2021	2022	2023	2021	2025	
Agricultural and Related Products	25,485,697	29,621,669	28,858,057	30,791,025	27,392,376	3,355,076	3,680,444	3,227,507	3,108,920	2,878,661	11%
Seafood	457,661	664,115	611,746	480,485	634,508	29,233	34,746	28,203	42,291	59,308	9%
Agricultural Products	24,572,138	28,404,969	27,720,786	29,631,436	26,075,034	3,273,089	3,583,299	3,160,924	3,029,173	2,778,378	11%
Consumer-Oriented Agricultural Total	7,613,200	9,197,481	8,348,608	8,570,923	9,252,587	705,294	868,381	637,927	536,158	439,346	5%
Dairy products	1,894,975	2,482,874	1,942,673	1,806,215	1,983,541	315,814	465,055	336,306	253,511	206,556	10%
Fresh fruit	1,387,150	1,350,644	1,309,545	1,508,781	1,879,030	77,672	63,807	47,764	34,286	43,414	2%
Fresh vegetables	769,417	756,242	823,603	902,603	737,912	1,024	531	1,699	2,516	2,290	0%
Beef & beef products	970,006	1,056,800	1,001,821	806,489	1,049,507	106,977	119,875	89,079	89,511	30,563	3%
Soup & other food preparations	650,067	806,006	684,176	698,674	734,875	116,064	106,415	65,088	57,717	62,019	8%
Processed vegetables	244,930	430,876	304,597	457,357	391,375	41,130	42,456	38,355	31,516	30,623	8%
Chocolate & cocoa products	187,355	275,602	247,188	360,809	423,004	1,044	13,436	8,075	6,932	4,984	1%
Bakery goods, cereals, & pasta	211,266	284,877	254,287	274,125	276,430	3,010	2,868	3,398	2,849	2,099	1%
Mfg. tobacco	137,042	196,497	253,117	269,022	297,018	314	854	1,006	628	493	0%
Coffee, roasted and extracts	95,680	142,072	136,683	218,554	251,551	1,339	1,549	684	601	526	0%
Processed fruit	137,235	182,853	193,016	206,830	182,996	10,473	14,725	12,535	10,950	10,110	6%
Dog & cat food	173,418	182,226	173,427	172,142	161,416	3,997	3,880	3,366	2,075	2,935	2%
Condiments & sauces	108,670	125,341	123,678	134,352	142,716	2,633	4,105	3,616	3,268	2,494	2%
Chewing gum & candy	73,651	118,794	124,335	130,901	139,480	231	618	824	1,521	553	0%
Non-alcoholic bev. (ex. juices, coffee, tea)	118,225	147,860	131,702	113,421	108,229	4,513	1,604	2,052	2,549	1,579	1%
Tree nuts	47,746	67,109	57,903	76,437	85,434	11,491	19,011	14,784	21,743	24,980	29%
Fruit & vegetable juices	25,104	27,903	38,019	31,307	38,926	2,285	2,380	2,190	1,904	2,539	7%
Pork & pork products	13,659	21,971	19,353	30,400	34,915	1,221	1,995	3,123	9,884	8,036	23%
Meat products nesoi	8,931	25,699	20,609	25,910	9,912	275	528	525	416	204	2%
Wine & related products	9,143	12,058	17,644	13,754	12,766	704	862	902	584	515	4%
Poultry Meat & Prods. (ex. eggs)	142	81	131	80	73	99	42	40	29	70	96%
Other Consumer-Oriented Products	349,386	503,099	491,100	332,758	311,479	2,985	1,783	2,516	1,169	1,766	1%

Source: Trade data Monitor

Best High-value, Consumer-Oriented Product Prospects Categories

Dairy products (cheese and butter), fresh fruits, meat products, confectionery products, baked products, snacks, beverages, health and functional food and beverages, dried fruits, and nuts.

SECTION VI. KEY CONTACTS AND FURTHER INFORMATION

Foreign Agricultural Service
U.S. Embassy
Jl. Medan Merdeka Selatan 5 Jakarta
Web: https://usda-indonesia.org
E-mail: AgJakarta@fas.usda.gov
Tel: +62 21 50831162

Food Standard and Registration
The National Agency for Drug
And Food Control (BPOM)
Web: www.pom.go.id
Tel: +62 21 4244691 / 42883309 /42883462
Call Center: 1500533

The Halal Product Assurance Organizing Agency (BPJPH)
www.bpjph.halal.go.id
Call Center: 46
Email: layanan@halal.go.id

Indonesian Food & Beverage Association
Web: www.gapmmi.or.id
Email: gapmi@cbn.net.id
Tel: +62 21 29517511

Indonesian Fruit & Vegetables Exporters & Importers Association
Email: info@aseibssindo.org
Tel: +62 21 72800343

Indonesian Meat Traders and Processors Association (APPDI)
Email: info.aspidi@gmail.com
Tel: +62 21 3454509

National Meat Processor Association
Web: www.nampa_ind.com
Email: nampa@napa-ind.com, skrt_nampa@yahoo.com
Tel: +62 21 7248455, 92907948

Dairy and Meat Facility Approval
Directorate General of Livestock
and Animal Health Services
Web: www.ditjennak.pertanian.go.id
Tel: +62 21 7815780

Animal/Plant Quarantine and Inspection
Indonesian Agricultural Quarantine Agency
Web: www.karantina.pertanian.go.id
Tel: +62 21 7816480 - 84, 7806482

U.S Cooperators and MAP Participants
U.S. Cooperators and MAP

Attachments:

No Attachments