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Report Highlights:

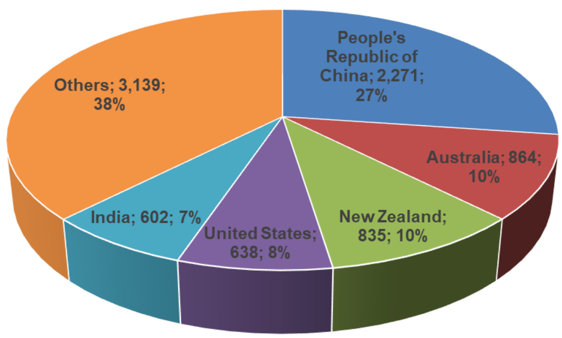
Indonesia's growing youth population, middle class, and urbanization offer promising opportunities for U.S. exporters. The retail sector had sales totaling $103 billion in 2023 with increased demand from convenience stores and traditional stores. Traditional markets still dominate the retail food and beverage sector, accounting for 76 percent of market share, although they continue to lose market share to modern retail stores and e-commerce. Among modern retail channels, convenience stores make up the largest segment and are expected to continue to grow in terms of the number of outlets due to their closer proximity to residential areas and expansion outside of Java Island.

Market Fact Sheet: Indonesia

Executive Summary

Indonesia is the fourth most populous nation in the world, with a population of approximately 279 million in 2023. Fifty-six percent of the population lives on Java Island, one of the most densely populated areas in the world. In 2023, Indonesia's GDP reached $1,355 billion and GDP per capita reached $4,857(est.). Indonesia is a major producer of rubber, palm oil, coffee, and cocoa. In 2023, agricultural imports reached $27.8 billion, $8.3 billion of which were consumer-oriented products. Soybeans, dairy products, animal feed, 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, 2023 (million USD)



Source: Trade Date Monitor LLC

Food Processing Industry

The food processing industry is comprised of approximately 8,639 large and medium-sized producers and 1.7 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 $103 billion in 2023 (with traditional grocery retailers accounting for 76 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 foodservice sector's total contribution to GDP was about $26.3 billion in 2023. The sector is dominated by small restaurants and street-side restaurants known as *warungs*.

Quick Facts CY 2023

Consumer-Oriented Product Imports: $8.3 billion
U.S. Share (8%) – $638million

Top 10 Growth Products:

1) dairy products
2) baked goods
3) baby food
4) confectioneries
5) frozen food
6) snacks
7) sauces
8) dressings & condiments
9) sweet biscuits
10) ice cream & frozen desserts

Food Industry by Channels (U.S. billion) 2023

Food Exports	$38
Food Imports	$6
Modern Grocery Retail	$25
Food Service	$30
Food E-commerce	$4
Traditional Market (small local grocers)	$79

Food Industry (GDP): $83.1 billion (2023)
Top 10 Retailers: Alfamart, Indomaret, Alfa Midi, Hypermart, Superindo, Transmart/Carrefour, Circle K, Lotte Mart, Farmer's Market, Hero
Population (millions): 279
GDP: $1,355 billion
GDP per capita: $4,857
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 / products; expanding middle class aspiring to a modern lifestyle.	Inadequate infrastructure, including ports and cold storage facilities outside of the main island of Java. Income inequality, especially in rural areas
Opportunities	**Challenges**
Rapid growth of retail sector and food service sector; expanding online sales platforms; growing export demand for processed products; 65 percent ingredients are imported.	Challenging business climate, onerous and unpredictable regulatory environment with non-transparent import regulations, mandatory halal certification.

Contact: FAS Jakarta, Indonesia
AgJakarta@usda.gov / http://www.usdaindonesia.org

SECTION I. MARKET SUMMARY

Indonesia's grocery retail sales increased by 3 percent to $103 billion in 2023, undergirded by the strong performance of convenience and traditional grocers. The growth of retail sales is an essential economic indicator, and, in 2023, Indonesia's economy also grew 5.1 percent, supported by declining inflation and robust private consumption which accounted for more than 60 percent of 2023 growth. Indonesia's demographic shift toward predominantly millennials and Gen Zers, accounting for 48 percent of the total population, combined with a growing middle class, are changing patterns of consumption and lifestyles. These consumers are increasingly seeking new products with a focus on health and nutrition.

Indonesia's grocery retail sector remains one of the most promising markets in Asia. Driven by a large population, growing middle class, and increasing urbanization, Indonesia presents opportunities for a full spectrum of consumer-oriented products. Grocery retail sales were also driven by growing numbers of middle- to upper-income consumers that are purchasing higher-quality, premium goods. Within the modern store category, convenience stores continued to maintain a strong growth, increasing the number of outlets in and outside of Java Island, especially in Sumatra.

Current trends in Indonesia's retail food industry include:

- **Online Shopping.** Modern retailers continue to expand their online presence to boost sales performance through e-commerce. Imported food products are widely available on online platforms such as Tokopedia and Shopee, which are sold by both importers and local retailers operating official stores within these platforms.
- **Speciality Stores.** In urban areas such as Jakarta, Bandung, and Surabaya, specialty stores are increasing in popularity. These stores offer high-quality imported products focusing on specific product categories, e.g., fruits, meat, seafood, organic products, premium poultry products etc. These specialty stores target upper-middle income consumers and are often located near residential areas.
- **Small Format Stores.** Supermarket and hypermarket operators have recently launched smaller format stores to compete with large convenience chains and reach consumers closer to their homes. Examples include Supra Boga Lestari launching its chain of Day2Day stores.
- **Supermarket Refrigeration Trends.** With increased demand for frozen food and fresh products, modern retailers have expanded their retail refrigeration capacity. According to the Indonesian Cold Chain Association (ARPI), the total market value for frozen food in Indonesia will increase to 200 trillion IDR ($13.5 billion) in 2025.
- **On-the-Go Packaging.** Convenience stores such as Indomaret and Family Mart have added imported fresh fruits in the form of on-the-go packaging to their product portfolio, available in urban areas.
- **Health Foods**. Healthy lifestyle trends continue as urban consumers seek healthier alternatives to mainstay processed products. The trend resulted in the newly launched supermarket Growell Whole Foods in 2020, which focuses on healthy and organic food products. The new outlet offers certified products from the United States, Japan, United Kingdom, and South Korea.

Advantages	Challenges
The digital transformation in e-commerce and ride-hailing apps in Indonesia will provide opportunity for the retail sector to reach more customers who are increasingly relying on online shopping.	Slow technology adoption within the demographic groups who live in rural areas limits e-commerce growth to large urban areas.
Healthy lifestyle trends are increasing opportunities for fresh products e.g., meat, fruits, and dairy.	Importing these products requires undergoing a lengthy and burdensome licensing process, including the requirement of import permits, plant approvals, halal certifications, and food/fruits registration numbers.
Younger consumers are driving demand for a variety of snack foods.	Imported snack foods are mostly available only in premium supermarkets.
Modern grocery channels continue to increase the variety of products and locations, continuing a shift from traditional markets.	Indonesia's modern retail sector is still dominated by traditional outlets, accounting for 76 percent of total grocery retail sales.

Grocery Retail Outlets by Channel in Indonesia

Category	**2021**		**2022**		**2023**	
	Sales Value (US$ million)	Outlets	Sales Value (US$ million)	Outlets	Sales Value (US$ million)	Outlets
Convenience Retailers	14,790	39,714	16,187	43,103	17,475	46,118
Supermarkets	4,560	1,468	4,829	1,534	4,695	1,491
Hypermarkets	1,286	294	1,235	257	1,193	249
Food/Drink/Tobacco Specialists	875.3	5,334	967.2	5,592	1,011	5,366
Small Local/ Traditional Grocers	72,565	3,974,988	76,892	3,935,238	78,886	3,919,767
Total Grocery Retailers	94,077	4,021,798	100,112	3,985,724	103,262	3,972,991
Food E-commerce	2,107	-	2,961	-	3,783	-

Source: Euromonitor International 2024

SECTION II. ROADMAP FOR MARKET ENTRY

Entry Strategy

Please see this report: Exporter Guide 2024 for information on how to enter the Indonesian market, including market research and local business customs.

Trade Shows in Indonesia

Name of Event	Location	Dates of Event	Website
Food and Hotel Indonesia 2025 Hotel Expo Indonesia 2025	Jakarta	22 – 25 July, 2025	www.foodhotelindonesia.com www.hotelexpoindonesia.com
SIAL InterFOOD	Jakarta	13 - 16 November, 2024	https://sialinterfood.com/
Food & Hotel Asia 2025 (Food & Beverage)	Singapore	8 – 11 April, 2025	https://foodnhotelasia.com/
Food Ingredients Asia 2026	Jakarta	16 – 18 September 2026	https://www.figlobal.com/asia-indonesia/en/home.html

Import Procedure

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

- Retail Product Registration Guide for Imported Food and Beverages – This report provides guidance on the registration process for retail foods.
- Food and Agricultural Import Regulations and Standards - Export Certificate 2023 - This report provides information on certificates required to export food and agricultural products to Indonesia.
- Food and Agricultural Import Regulations and Standards - Annual Report 2023 - This report provides information on Indonesia's import requirements for food and agricultural products.
- Tariffs and FTAs Information - Based on HS Code
- List of U.S. Retail Products in Indonesia- this site provides an updated list of U.S. products that have received approval for retail sale in Indonesia.
- U.S. Dairy Plant Registration Guidelines – this report provides information on the questionnaire/process required to apply for approval to export U.S. dairy products.
- Guide to Re-selling Containerized Cargo After Arrival

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, 2024. 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. U.S. suppliers may either get their products halal certified through a U.S. halal certifying body (HCB) accredited by Indonesia or directly with the Indonesian government. Please see GAIN Report ID2024-0005 for a list of all U.S. HCBs accredited by Indonesia or how to halal certify products directly with the Indonesian government. For additional information on halal regulations, please see the following reports: Indonesia Halal

20 Forum; Indonesia Notifies Draft Decree on Materials that are Exempted from Mandatory Halal and Clarifications on Decree 748 on Type of Product Required to be Halal Certified.

Distribution Channels

Distribution of imported products in Indonesia is limited to mostly urban areas and through supermarkets, hypermarket, and specialty stores, especially for perishable products such as dairy, meat, and fresh fruits. Convenience stores benefit from their wide distribution centers, with warehouses located across Indonesia. However, they mostly sell local products and a few imported products in small packaging which are affordable for middle-lower income consumers, such as confectioneries and snacks. Wet markets in Jakarta and other, secondary cities may offer limited imported products such as lower quality fresh fruits and secondary cuts of beef and offal. Grocery retailers procure foreign products via local importers or distributors due to regulations prohibited them from importing directly. However, some supermarkets have designated affiliate companies established expressly for importing directly.

Market Structure

Convenience Stores

Indomaret continues to lead the category with nearly 23,000 outlets across Indonesia, followed by Alfamart with 19,000 outlets. About 92 percent of the sales value for convenience stores in Indonesia is derived from these two companies, which have modern, integrated distribution systems and centralized procurement. However, these two chains mostly sell local products, and only a few imported products are available in their stores.

Convenience stores are expected to continue to be the fastest growing grocery retail segment, with an average of 1,000 new outlets each year. Convenience stores demonstrated their resiliency and necessity during the pandemic, providing reasonably priced products closer to residential areas during periods of mobility restrictions. Amid the pandemic, convenience stores had the strongest growth of all the retail channels in Indonesia, not only in terms of expanding their outlets but also in maintaining positive sales growth in 2020 and 2021.

In recent years, major convenience store chains, such as Indomaret, Alfamart, Lawson, and Family Mart, have transformed their stores from offering only grocery items to offering grocery items as well as ready-to-eat food. They have also expanded the locations of their mini stores which are mainly nested in office spaces and coffee shops. Although these kiosk-sized stores sell only a few imported products (fruits, confectioneries, snacks, beverages), with the large number of these outlets, this channel offers wide-reaching prospects for select products.

Hypermarket/Supermarket Stores

Hypermarkets and supermarkets are generally located in malls and shopping centers, and generally offer 5 to 30 percent imported food and beverage products. The percent of imported products can be as much as 60 percent for some premium or high-end stores such as Ranch Market, Grand Lucky, and KemChiks. Those premium outlets target upper-middle income and high-income consumers with a large variety of imported products such as fresh fruits, meat, snacks, condiments, and dairy products.

Superindo, Farmers, Ramayana, Ranch Market, and Hero are the top five supermarket brands in Indonesia, while the hypermarket category is led by Hypermart, Transmart Carrefour, Lottemart, Carrefour, and Grand Lucky. Major supermarkets and hypermarkets offer in-store bakeries, cafés and restaurants, and prepared meals, with grocery products typically contributing about 65 percent of total sales. Additional information on Indonesian supermarket/hypermarket chains can be found in this report: Retail Chain Overview and Product Survey.

There is currently a trend of supermarket chain operators diversifying their businesses by launching new supermarket brands targeting several different niche markets. The diversification is part of their business strategy to survive the fierce competition in Indonesia's retail sector. For example, in 2021, PT Supra Boga Lestari (operator of Ranch Market, Farmers Market, the Gourmet, and Day2Day) launched eleven new outlets from its new supermarket brand, Farmers Family, to meet the needs of lower-middle income consumers.

While in Indonesia's primary cities like Jakarta and Surabaya national supermarket brands dominate the market, in secondary cities such as Batam, Bali, and Bandung, the market is dominated by local supermarkets whose inventories are around 50 percent imported products. These local supermarkets include Pepito, SNL Food Grocery, Yogya, JC, Hokky and Bintang.

Specialty Stores
Increasing demand for healthy food options has led to the expansion of specialty stores focusing on fresh meat, fruit and vegetables, and seafood. Found mostly in major urban areas, outlets such as Total Buah, Rumah Buah, Frestive, and All Fresh offer high quality fresh produce to middle-upper income consumers. Meatshops have also expanded, as demand for quality meat and seafood has increased. Stores such as Indoguna Meatshop, Goodwins Butchery, Celine Meatshop, Bumi Maestro Ayu, and Stevan Meatshop sell premium cuts of beef, fresh and frozen seafood, and condiments.

Traditional Stores
Traditional stores consist of wet markets and independent small grocers ("mom and pop" stores), whose customers are mainly lower-to-middle income households. This retail channel accounts for about 76 percent of retail grocery sales. Some wet markets in urban areas sell imported products such as apples, mandarins, oranges, grapes, pears, and meat. Although the Government of Indonesia has implemented a program to revitalize wet markets, including helping them to survive by going digital, this channel will likely continue to struggle to maintain its market share due to more consumers switching to modern grocery and digital options.

Traditional small grocers do not carry the variety of products and services offered by minimarkets, instead selling affordable, mostly local food and beverage products familiar to local consumers. This differentiation, along with location, helps them remain competitive against modern retail outlets.

Top Indonesian Food Retailers (2023)

Brand Name	2023	
	Sales Value (US$ million)	Number of Outlet
Indomaret (**Indoritel Makmur International PT/** Salim Group)	7,888	22,515
Alfamart (Sumber Alfaria Trijaya Tbk PT)	8,001	19,057
Alfa Midi (Sumber Alfaria Trijaya Tbk PT)	1,222	2,234
Circle K (Circleka Indonesia Utama PT/ Alimentation Couche-Tard Inc)	205	685
Super Indo (Lion Superindo – Gelael PT/ Koninklijke Ahold Delhaize NV)	312	176
Hypermart (Matahari Putra Prima Tbk PT)	451	100
Transmart Carrefour (Trans Retail Indonesia PT)	479	156
Ramayana (Ramayana Lestari Sentosa Tbk PT)	83	72
Farmer's Market (Supra Boga Lestari Tbk PT)	146	41
Lotte Mart (Lotte Mart Indonesia PT/ Lotte Group)	230	50
Hero (Hero Supermarket Tbk PT/ DFI Retail group)	65	22
Ranch Market (Supra Boga Lestari Tbk PT)	88	19
Others	84,093	3,927,938
Total	103,262	3,972,991

Source: Euromonitor International 2024

Retail Sales Value of Alcoholic Drinks, Soft Drinks and Packaged Food (US$ million)

Category	2018	2019	2020	2021	2022	2023
Rice	7,416.2	7,933.1	8,274.8	9,150.1	9,795.4	11,086.1
Soft Drinks	10,094.1	10,749.3	8,722.8	9,287.8	9,689.6	10,171.5
Cooking Ingredients and Meals	3,828.1	4,094.1	4,359.1	4,952.0	4,923.4	5,070.2
Baked Goods	2,398.2	2,567.6	2,429.0	2,650.3	3,052.6	3,837.0
Noodles	2,731.0	2,924.4	3,029.1	3,360.2	3,534.1	3,638.5
Alcoholic Drinks	2,270.4	2,653.7	1,680.7	2,160.6	2,799.2	3,094.2
Baby Food	2,423.6	2,484.8	2,496.8	2,571.6	2,598.6	2,654.5
Drinking Milk Products	1,930.3	2,131.3	2,170.5	2,362.2	2,335.8	2,411.2
Savory **Snacks**	1,971.7	2,143.6	2,072.9	2,218.3	2,311.1	2,286.0
Sweet Biscuits, Snack Bars and Fruit Snacks	1,751.1	1,920.9	1,963.4	2,111.9	2,238.6	2,273.6
Processed Meat, Seafood and Alternatives to Meat	1,327.3	1,612.1	1,553.8	1,781.6	1,951.6	2,191.5
Confectionery	1,905.9	2,058.4	1,894.0	1,791.5	1,772.8	1,741.6
Other Dairy	919.2	969.2	1,023.4	1,124.5	1,238.9	1,318.0
Ice Cream	726.5	902.0	838.4	999.1	1,036.6	1,037.4
Yoghurt and Sour Milk Products	365.1	409.5	461.1	546.9	630.4	660.5
Cheese	160.2	180.0	252.1	338.2	406.8	504.7
Breakfast Cereals	103.0	119.3	131.4	147.6	161.2	179.0
Butter and Spreads	114.0	119.4	130.9	144.7	152.4	165.9
Plant-based Dairy	74.9	82.9	91.9	107.2	126.9	143.2
Processed Fruit and Vegetables	41.6	43.9	45.2	48.9	50.5	55.1
Pasta	27.0	28.6	30.1	32.4	41.0	45.8

Source: Euromonitor International 2024

SECTION III. COMPETITION

Local Competition

Local companies have a strong presence in the food and beverage market. Locally produced noodles, biscuits, confectionery, savoury snacks, processed meat, processed dairy products (such as UHT milk, cheese, and yoghurt), canned fish, and tropical fruits dominate retail shelves. In recent years, local producers have increased organic branding of fresh vegetables such as spinach and kale due to growth in demand from wealthier urban populations seeking healthier lifestyle products. Major multinational companies, including Nestle, Unilever, Friesland Campina, Danone, and Kraft Heinz locally produce a variety of dairy-based products, ready-to-drink beverages, condiments, and baby foods.

Import Market Competition

Indonesia mostly imports products that serve as inputs to food manufacturers or are not produced in adequate volumes locally, such as milk powder, French fries, beef, fresh and processed fruits and vegetables, and wine. The United States competes with New Zealand, Australia, and the EU in the dairy products category, with China and Australia in the fresh fruit category, and with Australia, India, Brazil, and New Zealand in the beef products category. Consumers in Indonesia view U.S. beef as a high-quality, premium product which competes with Australian beef at high-end supermarkets and hypermarkets, whereas Indian beef (buffalo meat) is mostly sold in traditional wet markets.

Competitive Situation for Selected Imported Consumer-Oriented Products in the Retail Market, 2023, ($million), metric tons (MT)

Product Category (Value and Quantity)	Key Exporter Countries (By value)	Key Constraints to Market Development	Market Attractiveness for U.S.
Fresh Fruit: **$1,309 million** **611,435 MT**	1. China (70%) 2. Australia (10%) 3. Thailand (7%) 4. USA (4%)	Indonesia maintains a trade-restrictive system for imported horticultural products, including restricts the volume and uncertain the issuance of import license.	Increased awareness of healthier lifestyle trends; low fruit consumption means more room to expand. A $1.3 billion market.
Beef & beef products **$1,002 million** **307,825 MT**	1. Australia (50%) 2. India (35%) 3. USA (9%) 4. New Zealand (4%)	As of 2022, import quota is determined at an inter-ministerial meeting that takes place prior to the issuance of import permits through the Commodity Balance system.	Shortage of local production. Middle-upper and premium supermarkets all sell mostly imported beef.
Bakery goods, cereals & pasta **$254 million** **72,555 MT**	1. Malaysia (37%) 2. China (15%) 3. Thailand (13%) 4. Vietnam (9%)	Requires obtaining food registration (ML) number from BPOM*, takes up to 6 months.	Demand for healthier bakery, cereals and pasta options continue to increase.
Cheese **$144 million** **26,107 MT**	1. New Zealand (41%) 2. USA (20%) 3. Australia (12%) 4. Argentina (6%)	Requires establishment, import recommendation, import permit approval and ML number, a lengthy process.	Local cheese production is dominated by processed cheeses; most the hard/semi-hard, and fresh cheeses are imported.
Condiments & sauces **$124 million** **68,486 MT**	1. China (27%) 2. Malaysia (20%) 3. Thailand (18%) 4. Singapore (9%)	Requires obtaining food registration (ML) number from BPOM*, takes up to 6 months.	Rapid urbanization and rising appetite for foreign food items are the key drivers for the demand of these products.
Chewing Gum & Candy **$124 million** **45,817 MT**	1. China (80%) 2. Malaysia (7%) 3. Thailand (2%) 4. Vietnam (2%)	Requires obtaining food registration (ML) number from BPOM*, takes up to 6 months.	Younger consumers drive the sales of this category.

*BPOM: Indonesia's Food and Drug Administration
Source: Trade Data Monitor

SECTION IV. BEST PRODUCT PROSPECTS CATEGORIES

Best Prospective U.S. Products for the Indonesian Food Retail Market

- Fresh fruits
- Beef
- Cheese
- Snack foods
- Frozen food
- Condiments

Top Consumer-Oriented Products Imported from the World

- Beef
- Garlic
- Food preparation: non-dairy creamer, food supplement etc
- Milk and cream powder
- Sauces
- Grapes
- Apples
- Pears
- Malt Extract
- Mandarin
- Whey and lactose
- Dog and cat food
- Butter
- Longan
- Coffee
- French fries

Top Consumer-Oriented Products Imported from the United States

- Milk and cream powder
- Food preparation: food supplement and flavouring
- Apples
- Frozen beef
- Grapes
- French fries
- Malt extract
- Whey and lactose
- Almonds
- Onion powder
- Cheese
- Raisins
- Oranges
- Dog and cat food

Products Not Present in Significant Quantities but which have Good Sales Potential

- Wine
- Cherries
- Plums
- Avocado
- Blueberries
- Strawberries
- Pistachios
- Fresh cut flowers
- Prunes
- Peaches
- Soups and broths

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

FAS – U.S. Embassy Jakarta
Web: www.usda-indonesia.org
E-mail : AgJakarta@usda.gov
Tel: +62 21 50831162

Food Standard and Registration
The National Agency for Drug and Food Control (BPOM)
Web: www.pom.go.id

Indonesian Food & Beverage Association
Web: www.gapmmi.or.id
Email: gapmi@cbn.net.id

Indonesian Fruit & Vegetables Exporters & Importers Association
Email: info@aseibssindo.org
Association of Indonesian Meat Importers
Email: asp_1984@cbn.net.id

National Meat Processor Association
Email: nampa@napa-ind.com

Dairy and Meat Approval Directorate General of Livestock and Animal Health Services
www.ditjennak.pertanian.go.id

Animal/Plant Quarantine and Inspection
Indonesian Agricultural Quarantine Agency
www.karantina.pertanian.go.id

U.S. Halal Certifying Bodies Approved by Indonesia for Food and Beverage Certification:
(in alphabetical order)

- American Halal Foundation (AHF) , based in Tampa, FL.
- Halal Transactions, Inc./Halal Transactions of Omaha (HTO) , based in Omaha, NE.
- Islamic Food and Nutrition Council of America (IFANCA) , based in Des Plaines, IL
- Islamic Services of America, Inc. (ISA) , based in Cedar Rapids, IA
- Islamic Society of the Washington Are (ISWA) Halal Certification Department, based in Silver Spring, MD

Attachments:

No Attachments