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Report Highlights:

Indonesia is the 11th largest export destination for U.S. agricultural products. In 2019, the United States was the largest agricultural exporter to Indonesia, accounting for \$2.9 billion of the total value of imports. Major exports include soybeans, cotton, feeds and fodders, wheat, dairy, distillers' grains, prepared food, fresh fruit and beef and beef products.

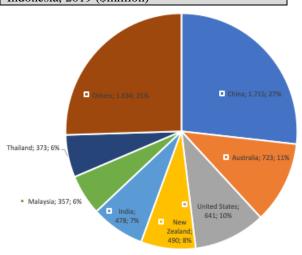
Post: Jakarta

Market Fact Sheet: Indonesia

Executive Summary

Indonesia is the fourth most populous nation in the world, with a population of approximately 268 million in 2019. Sixty-four percent of the population lives on Java, one of the most densely populated areas in the world. In 2019, Indonesia's GDP reached \$1.1 trillion and GDP/capita reached \$4,179(est.). Indonesia is a major producer of rubber, palm oil, coffee and cocoa. In 2019, agricultural imports reached \$19.8 billion (\$6.4 billion was consumeroriented products). In addition to consumer-oriented products, soybeans, cotton and wheat are top U.S. exports. Agricultural self-sufficiency is a stated goal of government and is often used to justify trade barriers and restrictions.

Import of Consumer – Oriented Products to Indonesia, 2019 (\$million)



Food Processing Industry

The food industry is comprised of approximately 7,485 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 very competitive.

Food Retail Industry

Indonesian grocery retail sales reached \$115 billion in 2019 (Traditional Grocery Retailers held 82 percent share). There are four players in the hypermarket group (Carrefour/Trans Mart, Giant, Hypermart, and Lotte Mart), and six in the supermarket segment (Alfa Midi, Hero, Superindo, Ranch Market & Farmers Market, Food

Mart, The Food Hall). Major Convenience stores include Indomaret and Alfamart.

Food Service Industry

The foodservice industry's total contribution to GDP was about \$24 billion (Rp341 trillion) in 2019. The sector is dominated by small restaurants, street-side restaurants known as warungs, and vendors that sell food to customers on the street.

Quick Facts for 2019

Agricultural Product Imports: \$19.8 billion

U.S. Share (16%) – \$3.2 billion

Consumer-Oriented Product Imports: \$6.4 billion

U.S. Share (10%) – \$642 million

Edible Fish & Seafood Products Imports: \$330

million

U.S. Share (7%) – \$22 million

Top 10 Growth Products:

Dairy products, baked goods, baby food, confectionery, processed meat & seafood, savoury snacks, sauces, dressing & condiments, sweet biscuit, snack bars & fruit snacks, and ice cream & frozen dessert

Top 10 Retailers

Indomart, Alfamart, Transmart/Carrefour, Alfa Midi, Hypermart, Giant, Hero, Lotte Mart, Superindo, Familymart

GDP/Population

2019 Population (million): 268 2019 GDP: \$1,1 Trillion 2019 GDP per capita: \$4,179

Economic Growth

2019: 5.02% 2018: 5.17%

Source: Indonesia Statistics, GTA and Euromonitor

Strength/Weakness/Opportunities/Challenge					
Strengths	Weaknesses				
Large Consumer Base	Inadequate infrastructure,				
	including ports and cold				
	storage facilities outside of				
	the main island of Java				
Opportunities	Challenges				
Modern retail sector;	Challenging business				
Japanese, Korean, and	climate, and unpredictable				
Western restaurant	regulatory environment.				
chains; bakeries.					

Contact: FAS Jakarta, Indonesia

AgJakarta@fas.usda.gov /www.usdaindonesia.org

SECTION I. MARKET OVERVIEW

With an estimated population of 268 million in 2019, Indonesia is the fourth most populous and the largest Muslim-majority country in the world. The country is dominated by productive age (15 – 64 years) consumers, which account for 67.7 percent of the total population. These consumers are increasingly seeking new products with a focus on health and nutrition. Indonesia's middle-class is forecast to reach 85 million by 2020 and 135 million in 2030¹, further driving consumer demand while providing a significant opportunity for imported food and beverages.

Amidst the pandemic, the economic growth in the 3rd quarter of 2020 is recovering gradually from -5.32 percent (year-over-year) in the 2nd quarter to -3.49 percent, driven by government stimulus and commodity exports². Economic growth is projected at -1.5 percent in 2020 and 6.1 percent in 2021^3 .

Kev Economic Data

	2016	2017	2018	2019	2020 (Projected)
Economic Growth (%)	5.0	5.1	5.2	5.0	(-2.2) - (-1.7)
GDP (billion \$)	920.5	1,002.9	1,031.2	1,141.9	1,106.1
Inflation (%)	3.0	3.6	3.1	2.7	2
Unemployment (%)	5.6	5.5	5.3	5.3	7.1
Population (million)	258.7	261.9	265	268.1	269.6

Source: Central Bureau of Statistics, Indonesia

Indonesia's longstanding ambition for self-sufficiency in key agricultural areas remains a high priority. Accordingly, many regulations issued to support the goal often create barriers for imported products, especially those which may compete with locally produced varieties. For additional information on Indonesia's trade barriers please refer to U.S. Trade Representative's National Trade Estimate on Foreign Barriers to Trade - 2020.

Indonesia: Advantages and Challenges

Advantages	Challenges
Positive economic growth and growing GDP per capita.	Indonesia's tourism industry and foodservice sector have been negatively impacted by the pandemic, slowing demand for higher quality imported products and ingredients.
The COVID-19 pandemic has increased e-commerce transactions. Online shoppers have increased from 75 million to 85 million ⁴ .	A growing local food movement has utilized e- commerce to offer innovative and competitive products.
Indonesia is the largest economy in Southeast Asia, with a rapidly growing middle class.	Income inequality, especially in rural areas.

https://www.mckinsey.com/~/media/mckinsey/featured%20insights/asia%20pacific/the%20archipelago%20economy/mgi_unleashing_indonesia _potential_executive_summary.ashx

https://www.kemenkeu.go.id/publikasi/berita/kuartal-iii-2020-pembalikan-ekonomi-terjadi/

³ World Economic Outlook, October 2020 (IMF)

⁴ https://jakartaglobe.id/opinion/unlocking-the-potential-of-indonesias-ecommerce-industry

Modern grocery stores are expanding to regions	U.S. consumer-oriented products (e.g. dairy,
outside Java and other major urban areas,	fresh fruit and beef) face strong competition
increasing market presence for import products.	and tariff advantages from China, Australia and
	New Zealand.
Convenience store format fastest growing	Limited imported packaged foods sold through
modern sales channel.	convenience stores.
The quality, variety, and production of local	Importing horticultural products requires two-
fresh fruits is not stable.	step license from MoA and MoT, often causing
	delays.

SECTION II. EXPORTER BUSINESS TIPS

Market Research

Contact information for many importers may not be available publicly. Many importers may operate multiple companies to provide easier clearance of goods through Customs. <u>FAS Jakarta</u> can assist exporters seeking initial market entry or to gain information on potential buyers. U.S. Exporters also can reach out to <u>local or regional USDA Cooperators</u> for additional market information.

It is critical to always conduct due diligence on importers before conducting any 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 will require approval from the original consignee. It is recommended that secure payment terms, such a Letter of Credit, be used to the extent possible.

Local Business 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 e-mails, especially if they do not know the sender. Indonesians generally prefer a face-to-face meeting.
- Buyers may communicate indirectly (e.g. "yes" doesn't necessarily mean they agree as culturally they may prefer to not to say anything negative).
- Indonesia has many different ethnic groups, but Javanese are the largest ethnic group in the country. Ethnic Chinese Indonesians operate many businesses in Indonesia.
- The Muslim holiday of Eid-ul-Fitr is the longest annual holiday in Indonesia. During the preceding month of Ramadan many Indonesians fast and the pace of business slows.
- 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 this as daily attire.

General Consumer Tastes and Trends

• Growing number of Japanese, Korean and Western restaurants offer high quality beef and seafood as the main course.

- Demand for premium baked goods has increased, requiring high-quality ingredients which are often imported (e.g. dairy products and dried fruits, nuts).
- Traditional and modern snack foods are popular in Indonesia and are increasingly combined with western styles by adding products such as cheese, premium beef, and 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.
- 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; bakery and packaged fresh fruit.

SECTION III. IMPORT FOOD STANDARDS & REGULATIONS/ IMPORT PROCEDURES

Please see below links 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 information on the procedures and requirements for registering a food or beverage product for retail sale with the Indonesia Food and Drug Agency (BPOM).
- <u>Indonesia: Food and Agricultural Import Regulations and Standards (FAIRS) Country</u>
 <u>Report 2019</u> This report provides detailed information on Indonesia's regulations and
 standards for imported food and agricultural products.
- <u>Indonesia</u>: Food and Agricultural Import Regulations and Standards Certificates 2019 This report provides detailed information on required certificates for the importation of food and agricultural products to Indonesia.
- Tariffs and FTA Information Based on HS Code
- List of U.S. Processed and Retail Products in Indonesia
- Guide to Re-selling Containerized Cargo After Arrival
- Approved U.S. establishments for export; Dairy Products, Meat Products, Pet Food
- U.S. Dairy Plant Registration Guidelines

SECTION IV. MARKET SECTOR STRUCTURE AND TRENDS

Top 5 Consumer-Oriented Products for Growth

Beef

In 2019, Indonesian imports of beef rose by 29 percent to 266,459 tons, valued at \$851million. This includes approximately 93,970 tons of Indian Buffalo Meat, imported by the government to stabilize prices in the local market. U.S. beef exports, which reached over \$85 million in 2019, are projected to decline by about 9 percent in 2020, impacted by the pandemic and restrictions on

large gatherings and international travellers. Full 2020 calendar year trade data will be available in February 2021.

Dairy Products

Over the past five years (2015 – 2019) demand for imported dairy products has increased by around 5.4 percent annually, triggered by low local milk production, healthy lifestyle trends, increasing income among middle class consumers and new product launches. In 2019, Indonesia imported 531,366 tons, worth US\$1.3 billion with major categories including powdered milk, lactose, whey protein, butter and fresh cheese. Although total dairy imports have slowed as a result of COVID-19, U.S. dairy exports continue to grow and are expected to reach more than 150,000 tons in 2020. Full 2020 calendar year trade data will be available in February 2021. For further information regarding this sector please see our report on <u>Indonesia Dairy and Product Annual 2020</u>.

Fresh Fruits

Although Indonesia produces a diverse range of tropical fruits, demand for imported fresh fruits continues to increase. In 2019, Indonesia imported \$1.4 billion of fresh fruits including pears, apples, grapes and oranges/mandarins, which together accounted for 84 percent of total import volume. Other popular imported fruits include dates, raisins, blueberries and cherries.

Snack Foods

Modern retailers report strong demand for snack foods at locations across the country. Sales of imported packaged food products are mostly sold though supermarkets or hypermarkets. Although registration requirements for retail packaged products can be burdensome, exporters who find the right importing partner are often rewarded with limited competition from similar product categories.

Processed Vegetables

Imports of processed vegetable products continue to grow. In 2019, imports of French fries increased 35 percent, canned vegetables 54 percent, and onion/garlic powder 13 percent.

Market Sector Structure and COVID-19 Impacts

Retail Sector

The number of modern stores in Indonesia reached to more than 36,000 with sales totalling \$20 billion⁵. Convenience stores have contributed to the growth of packaged food in Indonesia, as store expansions to rural areas have created opportunities to sell more packaged product across the country. Comparatively, the growth of supermarkets and hypermarkets has been slow with total stores reaching only 1,761⁶. For additional information please see: Indonesia: Retail Foods Update 2020.

⁵ Based on Euromonitor data 2020

⁶ Based on Euromonitor data 2020

Due to pandemic related restrictions on restaurants, consumers have shifted to buying more food from modern grocery stores for in-home cooking. As a result, sales at some modern grocery stores for the third quarter of 2020 saw significant growth. Supra Boga Lestari, brand owner of Ranch and Farmers Market stores grew year-over-year (yoy) sales by 29.2 percent from \$127 million in the same period last year. Alfamart, the second largest grocery chain, reported a 4.2 percent sales increase to \$4 billion. However, not all grocery retailers have experienced postivie growth in 2020. In contrast, Indomaret, the largest grocery chain, recorded a decline in sales of 21 percent (yoy) to \$4.6 billion and the food segment of Hero experienced a sales decline of 32.92% on an annual basis Hero predicts performance for the remainder of the year will continue to be significantly affected by the pandemic⁷.

Food Processing Sector

In 2019, the retail sales value of packaged food reached \$30.9 billion⁸. Indofood, Mayora Indah, Garuda Food Group, Wings Group are a few of the largest food processors in Indonesia, producing a variety of products such as snack foods, noodles, dairy, and beverages. According to the Ministry of Industry, approximately 62 percent ingredients for the food and beverage industry are imported. Government plans to reduce its foreign dependency by increasing local ingredients contribution to 60 percent are likely to face challenges. Please see the Food Processing Ingredients 2020 report for further information.

Food processors faced challenges in 2020 due to restricted operational activities at retail channels and lower demand from hotels and restaurants. This situation has led to a sales decline for most of large food processors. During the first three quarters of 2020 Mayora Indah's sales decreased by 2.1 percent (yoy) to \$1.3 billion, Garuda Food Group's sales dropped by 9.5 percent (yoy) to \$410 million and Diamond Food Indonesia's sales fell 12 percent (yoy) to \$318 million. Sales from the largest food processors in Indonesia, Indofood, grew by 3.4 percent to \$2.4 billion.

The Indonesian Food & Beverage Association (GAPMMI) projects 5%-7% growth for the food and beverage manufacturing industry in 2021. The growth will depend on Indonesia's overall economic performance, but also on middle- and upper-class consumption, which accounts for 82% of national food consumption¹⁰.

Foodservice Sector

Foodservice sales reached \$40.6 billion in 2019, up 6.4 percent from the previous year. Full-service restaurants have the largest market share, accounting for 84 percent of total foodservice sales, followed by cafés/ bars (6.5 percent) and fast food (5.5 percent). Please see this report Indonesia HRI Update - COVID-19 Impacts and Indonesia: Food Service - Hotel Restaurant Institutional 2020 for further information.

Due to restrictions on dine-in activities and temporary closures of some outlets during the COVID-19 pandemic, many restaurants reported lower sales for the third quarter of 2020. KFC's

⁷ Kontan News, November 3, 2020

⁸ Based on Euromonitor data 2019

⁹ https://www.kompas.id/baca/ekonomi/2020/11/21/subtitusi-impor-mesti-dimulai-dengan-membangunhulu/

 $^{^{10}\,}https://industri.kontan.co.id/news/gapmmi-industri-makanan-dan-minuman-bisa-tumbuh-5-7-tahun-depan$

net sales fell to \$256 million from \$358 million a year earlier, a decrease of 28.5 percent. Pizza Hut posted sales of \$190 million, or a 9.3 percent decline. MAP Boga Adiperkasa, brand owner of premium stores such as Starbucks, Pizza Marzano, and Cold Stone among others, reported a 34.5 percent decline in total sales at \$104 million.

SECTION V. AGRICULTURAL AND FOOD IMPORTS

Indonesian agricultural imports reached nearly \$20 billion in 2019, a 7 percent decrease over the previous year. The U.S., China, Australia, Thailand, and Argentina are the top five suppliers of agricultural products to the market, representing 57 percent of total imports by value.

Agricultural & Food Import Statistics

Top 15 Indonesia Imports Agricultural Products (2015 - 2020)								
Product	Calendar Year (Value: Million USD)					January-October		
	2015	2015 2016 2017 2018 2019 2				2019	2020	%Δ 20/19
Wheat	2,083	2,408	2,648	2,571	2,799	2,433	2,198	-9.64
Sugars & Sweeteners	1,430	2,293	2,271	2,038	1,585	1,332	2,043	53.36
Soybean meal	1,819	1,580	1,648	2,050	1,664	1,360	1,492	9.72
Dairy Products	1,048	968	1,168	1,209	1,323	1,056	1,103	4.46
Other Intermediate Products	840	815	736	1,260	1,219	1,033	899	-13.01
Fresh Fruit	611	783	1,101	1,202	1,368	975	862	-11.60
Soybeans	1,034	959	1,151	1,103	1,065	894	843	-5.72
Food Preps. & Misc. Bev	680	646	693	805	868	724	711	-1.85
Cotton	1,088	1,087	1,325	1,442	1,118	966	647	-33.04
Beef & Beef Products	251	569	586	725	851	663	527	-20.40
Fresh Vegetables	460	571	687	590	626	405	485	19.56
Tobacco	412	477	619	696	580	472	458	-2.96
Cocoa Beans	170	185	487	529	585	516	430	-16.80
Live Animals	549	614	546	607	630	506	399	-20.99
Peanuts	204	194	301	345	349	258	288	11.76
Other Product	3,275	3,229	2,974	4,132	3,229	2,699	2,463	-0.09
Total	15,956	17,378	18,939	21,305	19,857	16,292	15,848	-2.73

Source: TDM 2020

Best High-value, Consumer-Oriented Product Prospects Categories

Product	Import Value		Januar	y-October	Major Suppliers
	(\$million) 2019	2019	2020	%Δ 2020/19	(2020)

Fresh Fruit	1,368	975	862	-11.60	1. China (68%) 2. Australia (10% 3. U.S. (7%)
Dairy Products	1,323	1,056	1,103	4.46	1. New Zealand (30%) 2. U.S. (26%) 3. Australia (9%)
Food Preps. & Misc. Bev	868	724	711	-1.85	1. Malaysia (15%) 2. U.S. (14%) 3. Singapore (12%)
Beef & Beef Products	851	663	527	-20.40	1. Australia (51%) 2. India (26%) 3. U.S. (11%)
Processed Vegetables	191	157	141	-10.31	1. China (36%) 2. U.S. (25%) 3. Belgium (14%)
Processed Fruit	134	117	121	3.54	1. Egypt (19%) 2. Tunisia (18%) 3. China (11%) 4. U.S. (8%)
Snack Foods NESOI	122	100	83	-16.53	1. China (37%) 2. Malaysia (26%) 3. Thailand (21%) 17. U.S. (1%)
Condiments & Sauces	100	83	74	-11.59	1. China (24%) 2. Malaysia (21%) 3. Thailand (12%) 6. U.S. (4%)
Dog & Cat Food	95	78	95	21.47	1. Thailand (49%) 2. China (18%) 3. France (14%) 5. U.S. (3%)
Tea	64	50	41	-19.30	1. China (36%) 2. Vietnam (21%) 3. Kenya (13%) 4. U.S. (7%)
Non-Alcoholic Bev. (ex. juices, coffee, tea)	63	52	50	-3.29	1. Malaysia (49%) 2. Thailand (23%) 3. South Korea (14%) 4. U.S. (9%)
Tree Nuts	56	45	32	-28.83	1. China (30%) 2. U.S. (27%) 3. Vietnam (11%)

Fruit & Vegetable Juices	25	21	21	-1.83	1. Brazil (24%) 2. China (21%) 3. U.S. (12%)
Meat Products NESOI	17	15	9	-39.05	1. Australia (76%) 2. France (14%) 3. China (4%) 4. U.S. (3%)
Wine & Beer	17	10	2	-79.93	1. Australia (45%) 2. Chile (16%) 3. U.S. (8%)
Eggs & Products	11	9	10	7.31	1. India (65%) 2. Ukraine (20%) 3. Italy (4%) 6. U.S. (1%)
Pork & Pork Products	4	3	7	116.45	1. China (58%) 2. Spain (17%) 3. U.S. (14%)

Source: TDM 2020

SECTION VI. KEY CONTACTS AND FURTHER INFORMATION

FAS/ Jakarta

U.S Embassy

Jl. Medan Merdeka Selatan 5 Jakarta

Web: www.usdaindoneisa.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

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

Web: www.nampa_ind.com 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 Cooperators and MAP Participants

U.S Cooperators and MAP

Calendar or Trade Shows in Indonesia

Name of Event: **FOOD, HOTEL & INDONESIA 2021**Event Location: Jakarta International Expo, Indonesia

Industry theme: The 16th Indonesia's Leading Trade International Exhibition for Food,

Beverage & Hospitality Industry

Dates of Event:

Type of Event:

Name of Organizer:

E-mail of Organizer:

July 28 - 31, 2021

International Exhibition

P.T. Pamerindo Buana Abadi

wiwiek@pamerindo.com

Web site: www.pamerindo.com or www.fhtbali.com

Name of Event: **FOOD, HOTEL & TOURISM BALI 2022**

Event Location: Bali International Convention Center, Nusa Dua - Bali, Indonesia

Industry theme: The 11th International Exhibition for Equipment, Food,

Beverages and Services to Support Indonesia's Tourism

and Hospitality Industries.

Dates of Event: March 17 - 19, 2022

Type of Event: International Exhibition

Name of Organizer: P.T. Pamerindo Buana Abadi

E-mail of Organizer: wiwiek@pamerindo.com

Web site: www.pamerindo.com or www.fhtbali.com

Name of Event: **HOTELEXPO INDONESIA 2022**Event Location: Jakarta International Expo (JIEXPO)

Industry theme: Hotelexpo Indonesia and Specialty Food Indonesia covers the latest trend

and innovation in hospitality and culinary sector.

Dates of Event:

Type of Event:

Name of Organizer:

E-mail of Organizer:

July 27 - 29, 2022

International Exhibition

P.T. Pamerindo Buana Abadi

wiwiek@pamerindo.com

Web site: www.pamerindo.com or www.hotelexpoindonesia.com

Name of Event: INDO LIVESTOCK 2021

Event Location: Balai Sidang Jakarta Convention Center

Industry theme: Indonesia's No. 1 Livestock, Feed, Dairy and Fisheries Industry Show

Dates of Event: June 23 - 25, 2021
Type of Event: International Exhibition

Name of Organizer: P.T. Napindo Media Ashatama

E-mail of Organizer: contact@merebo.com

Web site: https://indolivestock.merebo.com/

Name of Event: **FOOD INGREDIENT ASIA 2022**

Event Location: Jakarta International Exhibition Center, Kemayoran, Indonesia
Industry theme: The only exhibition that unites the growing ASEAN food

ingredients community in one place. The location alternates with

Bangkok. The fair encompasses all ingredients.

Dates of Event: September -7 - 9, 2022
Type of Event: International Exhibition

Name of Organizer: Informa Markets

E-mail of Organizer: informamarkets@informa.com

Web site: https://www.figlobal.com/asia-indonesia/en/home.html

Name of Event: SIAL InterFOOD 2021

Event Location: Jakarta International Exhibition Center, Kemayoran, Indonesia

Industry theme: Dedicated B2B Platform for the Indonesia and ASEAN Food & Beverage

Industry

Dates of Event:
Type of Event:
Name of Organizer:
E-mail of Organizer:
Web site:

November 10 - 13, 2021
International Exhibition
Krista Exhibitions
info@kristamedia.com
https://sialinterfood.com/

Attachments:

No Attachments