Required Report: Required - Public Distribution **Date:** November 21, 2025

Report Number: ID2025-0036

Report Name: Retail Foods Annual

Country: Indonesia

Post: Jakarta

Report Category: Retail Foods

Prepared By: Novi Yuningsih

Approved By: Kristina Schammel

Report Highlights:

Indonesia's grocery retail sector reached $101 billion in 2024, though it contracted slightly due to slowing consumer purchasing power and high operating costs. Traditional retailers, which still account for about 73 percent of the market, continued to decline, while supermarkets and hypermarkets also struggled amid store closures. Convenience stores, however, continued to expand as consumers favored nearby flexible shopping options, while food e-commerce also posted strong double-digit growth. Despite near-term challenges, Indonesia's vast population of 282 million and rising middle class continue to make it one of Asia's most promising markets, with growing demand for healthy, nutritious, and premium products.

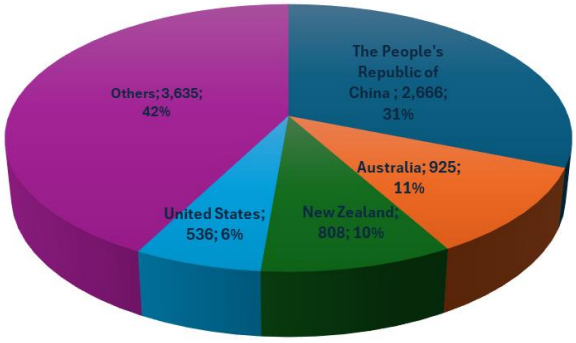
THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT POLICY

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 $1,371 billion and GDP per capita reached $4,867 (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: $1,371 billion, GDP per capita: $4,867
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.

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

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT POLICY

SECTION I. MARKET SUMMARY

In 2024, Indonesia's grocery retail sector faced slowing consumer purchasing power and high operating costs, pressuring traditional supermarkets and hypermarkets. The grocery retail sector slightly contracted from 2023 to 2024, with sales declining from $102 billion to $101 billion[1]. Traditional grocery retailers, including ("mom and pop" stores) small independent grocery stores and wet market remain the largest channel for grocery retail in Indonesia but declined further, while supermarkets and hypermarkets also saw decreases, reflecting the challenges for large-format stores. In contrast, convenience retailers grew modestly, and food e-commerce posted the strongest growth, rising nearly 19 percent, showing consumers' shift towards digital and on-the-go shopping. However, inflationary pressures and minimum wage adjustments reduced the purchasing power of the lower-middle class, making consumers more selective and focused on affordable products. Competition from digital platforms further reshaped shopping behavior, pushing the market toward flexible, convenience-driven formats.

Despite these challenges, Indonesia remains one of the most promising markets in Asia. With 282 million people, a significant middle class, and 47 percent of the population made up of millennials and Gen Z, consumption patterns are shifting towards healthy, nutritious, and premium goods. Middle to upper income consumers is increasingly purchasing higher quality products, while convenience stores continue to expand both in Java and other regions, especially in Sumatra. Supported by urbanization and demographic trends, Indonesia's retail sector continues to offer vast opportunities across consumer-oriented products, underpinned by demand for innovative, healthier, and more diverse offerings.

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.
- **Specialty 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). 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. An example includes 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**. Urban consumers increasingly seek healthier alternatives, driving the growth of supermarkets like Growell Whole Foods and Sesa Organic Market (the

[1] Euromonitor International 2025

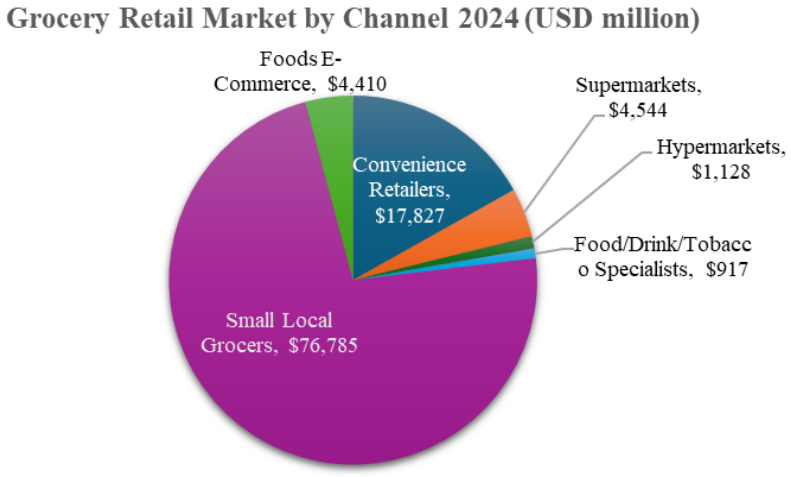
largest organic supermarket in Indonesia), both specializing in organic and certified international products from the United States, Japan, United Kingdom, and South Korea.

- **Shift Toward Residential Areas**. Retailers are opening more stores in residential areas to address urban congestion and offer greater convenience, catering to busy lifestyles and reducing travel time for shoppers. For instance, Grand Lucky, a well-known supermarket chain in Indonesia, opened a store on the outskirts of Jakarta in the city of Tangerang in July 2025, strategically near residential neighborhoods.
- **Customer-Centric Store Layouts**. Retailers are enhancing store designs to ensure a smooth and comfortable shopping experience, with thoughtful organization of sections like seafood and meat to minimize discomfort and improve customer satisfaction.

Table 1. Advantages and Challenges

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, seafood, plant-based products, and dairy.	Many product categories have lengthy and burdensome import requirements, including facility registration (meat and dairy), import licensing (beef, seafood, and fruit), halal certification (will expand beyond meat and dairy in 2026), and product registration (food and fruit).
Younger consumers are boosting demand for snacks, convenience foods, and imported packaged products, creating room for U.S. exporters.	Imported snacks and confectionery remain limited to premium outlets, with U.S. products facing higher tariffs than competitors with Free Trade Agreements (FTAs).
Modern grocery channels continue to increase the variety of products and locations, continuing a shift from traditional markets.	• Indonesia's grocery retail sector is still dominated by traditional outlets, accounting for 73 percent of total grocery retail sales. • Lulu and GS Supermarkets left Indonesia due to weak sales, high costs, and a consumer shift to e-commerce and convenience stores.

Figure 1. Retail Sales by Channel



Source: Euromonitor International 2025

SECTION II. ROADMAP FOR MARKET ENTRY

Entry Strategy

Please see report: Exporter Guide 2025 for information on how to enter the Indonesian market, including market research, import requirements, and local business customs.

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

Name of Event	Location	Date of Event	Website
Food and Hotel Indonesia 2025	Jakarta	22 - 25 July 2025	www.foodhotelindonesia.com
SIAL InterFOOD	Jakarta	12 - 15 November 2025	https://sialinterfood.com/
Food & Hotel Asia 2025 (Food & Beverage)	Singapore	21 - 24 April 2026	https://foodnhotelasia.com/
Food Ingredients Asia 2026	Jakarta	16 - 18 September 2026	https://www.figlobal.com/asia-indonesia/en/home.html

Import Procedure

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

- Retail Product Registration Guide for Imported Food and Beverages - Provides information on the procedures and requirements for registering a food or beverage product for retail sale with the Indonesian Food and Drug Agency (BPOM).
- Indonesia: Food and Agricultural Import Regulations and Standards (FAIRS) Country Report 2024 - Provides detailed information on Indonesia's regulations and standards for imported food and agricultural products.
- Indonesia: Food and Agricultural Import Regulations and Standards - Certificates 2024 - Provides detailed information on required certificates for the importation of food and agricultural products to Indonesia.
- 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.
- 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
- Reports Listing Approved U.S. Establishments for Export to Indonesia: Dairy Products, Meat Products and Pet Food
- Imported Dairy Products and Foreign Dairy Import Facility Registration Questionnaire - Provides a guide for current dairy establishment approval.

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.

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

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 products, meat, and fresh fruits. Convenience stores benefit from 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 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 prohibiting direct imports from exporters. However, some supermarkets have designated affiliate companies established specifically for importing directly.

Market Structure

Convenience Stores

The convenience retail sector in Indonesia has experienced steady growth, with outlet numbers reaching 48,158 in 2024 and projected to grow to 68,978 by 2029. This growth is driven by dominant players Alfamart (23,277 outlets) and Indomaret (23,107 outlets)[3]. Together, these chains contribute approximately 72 percent of the sales value in the modern grocery retail segment, supported by advanced distribution systems and centralized procurement, though their offerings are primarily local products with limited imported items. Convenience stores are expected to remain the fastest-growing grocery retail segment, adding around 1,000 new outlets annually.

Opportunities include expanding beyond Java, leveraging urbanization, and adopting innovative strategies such as digital payment systems and loyalty programs to enhance customer engagement. Key trends include aggressive price discounting, the rise of fresh food and private-branded nuts (e.g., pistachios and almonds), targeting urban consumers, and the integration of co-working and social spaces within outlets to cater to modern lifestyles. Major chains like Indomaret, Alfamart, Lawson, and Family Mart have diversified their offerings to include ready-to-eat food and expanded kiosk-sized stores in office spaces and coffee shops, creating significant opportunities for select imported products like fruits, snacks, and beverages.

Hypermarket/Supermarket Stores

Indonesia's hypermarket sector is contracting with the number of outlets declining from 336 in 2019 to 244 in 2024, notably impacted by the closure of UAE-based Lulu Hypermarket on April 30, 2025. In contrast, supermarkets continue to expand, rising from 1,427 outlets in 2019 to 1,585 in 2024, with projections for the number of outlets to reach 1,762 by 2029. However, also in 2025, GS Supermarket (South Korea-based) shut down all 31 outlets on May 31, 2025. The Foodhall acquired GS Supermarket and rebranded under the name Daily Supermarket. These closures reflect broader pressures in the sector, including weakening consumer purchasing power, high operating costs, and intensifying competition from e-commerce platforms and convenience stores. Hypermarkets and supermarkets in Indonesia are typically located in malls and shopping centers, offering 5 to 30 percent imported food and beverage products, with premium stores like Ranch Market, The Foodhall, Grand Lucky, and KemChiks featuring up to 60 percent imported goods. These high-end outlets cater to upper-middle and high-income consumers with a wide range of imported items such as fresh

[3] Euromonitor International 2025

fruits, meat, snacks, and dairy products. While national chains like Superindo, Farmers, and Ranch Market dominate the market in Jakarta, in other key cities, including Surabaya, Batam, Bali, and Bandung, local players such as Pepito, Yogya, and Hokky lead the market, often featuring around 50 percent imported products.

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. Meat shops have also expanded, as demand for quality meat and seafood has increased. Stores such as Indoguna Meat Shop, Goodwins Butchery, Celine Meat Shop, Bumi Maestro Ayu, and Stevan Meat Shop sell premium cuts of beef, fresh and frozen seafood, and condiments.

Traditional Stores

Traditional stores consist of wet markets including ("mom and pop" stores) small independent grocery stores and wet market, whose customers are mainly lower-to-middle income households and sell daily necessities such as rice, cooking oil, eggs, sugar, coffee, and instant noodles. This retail channel accounts for about 73 percent of retail grocery sales with nearly four million stores in 2024. 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 providing assistance to "go digital," wet markets will likely continue to struggle to maintain market share due to more consumers switching to modern grocery like convenience stores and digital options. Traditional small grocers do not carry the variety of products and services offered by convenience stores, instead selling affordable mostly local food and beverage products familiar to local consumers. This differentiation, along with location, helps traditional small grocers remain competitive against modern retail outlets.

Table 3. Profile of Selected Indonesian Grocery Retailers (2024)[4]

Retailer Name	2024 Sales Value (USD million)	Retailer Profile
Alfamart	$7,429	• Largest retail chain with 23,277 outlets (65% on Java Island). • Targets middle- to lower-income consumers; food products = 70% of sales. • Offers private-label snacks and imported fruits.
Indomaret	$7,061	• Operates 23,107 outlets across 35 provinces. • Part of Salim Group; private-label products include imported almonds/pistachios. • Features bakery brands (e.g., Mr. Bread) and Point Coffee outlets
Alfamidi	$1,240	• 2,809 outlets (Alfamidi, Alfamidi Super, Midi Fresh, Lawson). • Targets middle-class consumers; food products = 74% of sales. • Nationwide distribution network for convenience.
Hypermart, Foodmart Supermarket, Primo Supermarket, Hyfresh Supermarket	$444	• Operates 130 outlets under four brands. • Hypermart serves middle- to high-income consumers; Primo targets upper-middle. • U.S. products include beef, snacks, frozen food, and condiments.
Supra Boga Lestari (SBL)	$166	• 60 outlets under Ranch Market, Farmers Market, The Gourmet, Day2Day, Pasarina.

[4] The Indonesian grocery retailers listed above are store chains with the potential to feature and sell U.S. products.

		• Ranch Market/The Gourmet focuses on imported goods for upper-income consumers. • Fresh products = 40%+ of revenue.
The Foodhall	$150	• Premium supermarket chain with 36 outlets in upscale malls. • Targets upper-middle/high-income consumers with curated imported/premium products. • Focuses on quality, exclusivity, and lifestyle.
Grand Lucky	$110	• Expanding premium chain with 11+ stores in major cities. • Strong focus on imported goods for upper-income consumers. • Operates Hokky (Surabaya) and Berastagi (Medan); expanding in urban markets.

Source: Data: Euromonitor International, Retailer Profile: FAS Analysis

Table 4. Retail Sales of Selected Packaged Foods, Beverages, and Alcoholic Products (USD million)[5]

Retail Food/ Beverage	2019	2020	2021	2022	2023	2024
Rice	7,194.8	7,734.4	8,391.9	9,235.8	10,299.4	11,638.2
Bottled Water	4,034.4	3,287.6	3,451.9	3,648.7	4,015.3	4,501.9
Noodles	2,652.3	2,831.3	3,081.7	3,363.9	3,583.8	3,898.6
Sauces, Dips and Condiments	1,862.0	1,988.5	2,150.6	2,375.9	2,567.0	2,712.8
Baby Food	2,128.1	2,203.9	2,227.2	2,337.4	2,452.7	2,451.1
Drinking Milk Products	1,825.5	1,915.9	2,045.9	2,099.6	2,223.9	2,349.2
RTD Tea	2,303.0	1,925.8	1,985.2	2,135.3	2,218.3	2,314.9
Sweet Biscuits	1,659.1	1,750.9	1,849.7	2,038.3	2,126.1	2,203.9
Pastries	1,448.7	1,355.5	1,451.3	1,778.4	1,900.1	2,038.0
Palm Cooking Oil	1,609.7	1,819.8	2,092.8	1,975.6	1,916.1	1,912.1
Confectionery	1,975.4	1,875.3	1,746.3	1,833.0	1,863.8	1,878.6
Processed Meat	1,055.4	1,020.2	1,162.3	1,345.5	1,554.6	1,822.0
Beer	1,537.5	920.1	1,168.0	1,562.3	1,700.0	1,820.7
Sauces	1,122.2	1,202.5	1,296.5	1,446.2	1,542.2	1,627.7
Other Dairy	830.1	903.4	973.9	1,113.7	1,215.7	1,295.2
Packaged Pastries	791.3	665.2	725.1	919.3	985.6	1,071.7
Salty Snacks	794.6	830.9	874.0	960.3	984.5	1,046.5
Ice Cream	772.7	734.7	858.0	919.2	938.4	981.2
Carbonates	880.6	705.9	761.0	841.4	876.1	901.9
Bread	446.9	459.5	492.5	599.7	724.5	810.4
Juice	750.9	707.1	724.5	758.3	792.6	809.2
Yogurt and Sour Milk Products	361.3	458.8	620.9	745.0	789.5	807.3
Wine	489.6	341.0	402.9	489.0	572.2	656.9
Concentrates	538.3	499.2	513.4	550.0	565.8	613.7
Nuts, Seeds and Trail Mixes	598.9	542.9	569.9	600.1	604.3	611.8
Cheese	154.1	222.5	292.9	365.7	465.5	515.2
Bouillon	317.0	344.0	374.3	408.0	448.2	472.5
Processed Seafood	286.8	304.5	335.0	365.7	416.7	471.2
Savory Biscuits	358.4	370.8	386.9	411.7	419.5	437.7
Spirits	304.4	217.6	259.8	332.7	381.5	434.5
Popcorn	4.7	4.4	4.3	4.4	4.6	4.8

Source: Euromonitor International 2025

[5] The retail sales of the selected products listed above represent a combination of items that make a significant contribution to overall grocery retail sales and demonstrate strong potential for U.S. grocery products in the Indonesian market.

SECTION III. COMPETITION

Local Competition

Local companies have a strong presence in the food and beverage market. Locally produced noodles, biscuits, confectionery, savory snacks, processed meat, processed dairy products (such as Ultra High Temperature processing milk, cheese, and yogurt), 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's imports of consumer-oriented products rose slightly from $8.35 billion in 2023 to $8.57 billion in 2024. This growth is supported by notable increases in fresh fruit, fresh vegetables, processed vegetables, and chocolate and cocoa products, while dairy and beef imports contracted, the latter largely due to reduced state-enterprise purchases of Indian buffalo meat. The People's Republic of China (PRC) remained the largest supplier for consumer-oriented products with a 31 percent share, followed by Australia (11 percent), New Zealand (9 percent), Thailand (7 percent), and the United States (6 percent). The U.S. market share decreasing by 1.5 percent from the previous year as dairy and fresh fruit exports fell sharply, further described in FAS Jakarta's recent report, Drivers and Trends of U.S. Agricultural Trade with Indonesia – Opportunities and Challenges.

Indonesia mostly imports products that serve as inputs to food manufacturers or are not produced in adequate volumes locally, such as milk powder, frozen potatoes, beef, fresh and processed fruits and vegetables, and wine. The United States competes with New Zealand, Australia, and the European Union in the dairy products category; with the PRC, Australia, and New Zealand in the fresh fruit category (apples, grapes, pears, oranges and lemons); and Australia, India (buffalo meat), 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 buffalo meat is mostly sold in traditional wet markets.

Competition is influenced by tariffs, and many U.S. competitors benefit from FTAs with Indonesia giving them a price advantage. For example, Australia and New Zealand enjoy reduced tariffs under the ASEAN-Australia-New Zealand Free Trade Agreement (AANZFTA). In addition, countries like the PRC have improved the quality and variety of their fresh fruit offerings while maintaining lower prices, creating additional competition in the Indonesian market.

Table 5. Competitive Situation for Select Imported Consumer-Oriented Products in the Retail Market, 2024, (USD million)/metric tons (MT)[6]

Product Category (Value and Quantity)	Key Exporter Countries (By value)	Key Constraints to Market Development	Market Attractiveness for U.S.
Fresh Fruit: $1,509 million 699,307 MT	1. PRC (73%) 2. Australia (9%) 3. Thailand (7%) 4. USA (2%)	Indonesia's restrictive import licensing system which restricts apple, grape, and orange imports through opaque regulations, quota volume restrictions, and delayed license issuance. In addition, U.S. fruit faces competition from duty-free suppliers.	Rising demand for pears, apples, grapes, and oranges, driven by healthier lifestyle trends and interest in increasing fruit consumption.
Beef & Beef Products $806 million 239,255 MT	1. Australia (61%) 2. India (17%) 3. USA (11%) 4. New Zealand (6%)	Indonesia's restrictive import licensing system which restricts beef imports through opaque regulations, delayed license issuance, and quota reductions. In addition, beef must be certified halal and from plants approved by the Government of Indonesia (a lengthy and burdensome process). U.S. beef faces competition from duty-free suppliers.	Rising demand, import reliance, and opportunities in premium retail and foodservice sectors.
Bakery Goods, Cereals & Pasta $274 million 82,701 MT	1. Malaysia (39%) 2. PRC (20%) 3. Thailand (11%) 4. South Korea (8%)	Mandatory halal certification (starting Oct 2026), food registration requirements (BPOM, takes up to 6 months), high MFN tariffs (20%), and strong domestic competition.	Large, growing population with rising demand for convenient and premium food products.
Cheese $148 million 28,123 MT	1. New Zealand (41%) 2. Australia (21%) 3. USA (12%) 4. Denmark (6%)	Import licensing requirements and registration requirements (BPOM, takes up to 6 months). All dairy products must be certified halal and from plants approved by the Government of Indonesia (a lengthy and burdensome process).	Local cheese production is largely processed cheeses; most hard/semi-hard and fresh cheeses are imported.
Condiments & Sauces $134 million 81,857 MT	1. PRC (29%) 2. Malaysia (22%) 3. Thailand (117%) 4. Singapore (8%)	Mandatory halal certification (starting Oct 2026), food registration process (BPOM, takes up to 6 months), and high MFN tariffs (15%).	Rapid urbanization and rising appetite for foreign food items are the key drivers for demand.
Chewing Gum & Candy $124 million 45,817 MT	1. PRC (80%) 2. Malaysia (7%) 3. Thailand (2%) 4. Vietnam (2%)	Mandatory halal certification (starting Oct 2026), food registration process (BPOM, takes up to 6 months) and high MFN tariffs (20%).	Younger consumers drive the sales of this category.

Source: Trade Data Monitor

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

SECTION IV. BEST PRODUCT PROSPECT CATEGORIES

Best Prospective U.S. Products for the Indonesian Food Retail Market
Fresh fruits (apples, grapes, oranges, pears, mandarin, blueberries, cherries); beef; cheese; snack foods; frozen food and condiments.

Top Consumer-Oriented Products Imported from the World
Beef; garlic; food preparation: non-dairy creamer, food supplement etc.; milk and cream powder; grapes; apples; pears; malt extract; mandarin and oranges; whey and lactose; dog and cat food; butter; longan; coffee; French fries; dates; cheese and sauces.

Top Consumer-Oriented Products Imported from the United States
Milk and cream powder; frozen beef; food preparation: food supplements and flavoring; apples; French fries; almonds; lactose; potato flakes/ granules; onion powder; dog and cat food; cheese and pork.

Products Not Present in Significant Quantities but have Good Sales Potential
Wine; butter; cherries; plums; avocado; blueberries; strawberries; pistachios; fresh cut flowers; prunes; peaches and soups and broths.

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

1. FAS – U.S. Embassy Jakarta
   Web: www.usda-indonesia.org
   E-mail: AgJakarta@usda.gov
   Tel: +62 21 50831162
2. Food Standard and Registration
   The National Agency for Drug and Food Control (BPOM)
   Web: www.pom.go.id
3. Indonesian Food & Beverage Association
   Web: www.gapmmi.or.id
   Email: gapmi@cbn.net.id
4. Indonesian Fruit & Vegetables Exporters & Importers Association
   Email: info@asseibsindo.org or asseibsindo@asseibsindo.org
5. Association of Indonesian Meat Importers
   Email: info.aspidi@gmail.com
6. National Meat Processor Association
   Email: nampa@nampa-ind.com
7. Dairy and Meat Approval Directorate General of Livestock and Animal Health Services
   Web: www.ditjennak.pertanian.go.id
8. Animal/Plant Quarantine and Inspection /Indonesian Agricultural Quarantine Agency
   Web: www.karantina.pertanian.go.id
9. U.S. Halal Certifying Bodies Approved by Indonesia for Food and Beverage Certification (in alphabetical order): American Halal Foundation (AHF); Halal Transactions, Inc./Halal Transactions of Omaha (HTO); Islamic Food and Nutrition Council of America (IFANCA); Islamic Services of America, Inc. (ISA); Islamic Society of the Washington Are (ISWA) Halal Certification Department

Attachments:

No Attachments