

Indonesia Retail Sector - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Indonesia Retail Sector Market is expected to register a CAGR of 5% during the forecast period.

The retail sector in Indonesia remains one of the most promising markets among Asian countries, on the back of its large population and the growing middle class with higher household purchasing power and increasingly modern spending habits. However, the sudden COVID-19 pandemic has pushed the market into lockdowns, resulting in a drop in the revenues of the physical distribution channels. The small and unorganized players incurred several losses, of which some result in a temporary halt of the business activities. Though the consumption was largely affected by higher prices for food, electricity, etc., during the initial year of the study period, i.e., during 2018, the retail sector got back to track with the support of lower credit cost, increasing employment, and an expansion of social welfare.

In Indonesia, household consumption has slowed down in the past two years, which is a great concern, as household consumption has been the biggest driving factor for the economy and is of greater importance than investment, exports, and government spending. Private consumption in the form of household spending has always accounted for more than 50% of the nation's GDP yet. There has been a slowdown in consumption growth. The retailer's profit margins were unstable during the study period and were largely affected by the sudden COVID-19 pandemic. The retail sector is expected to witness a slow recovery rate in the country owing to the people's purchasing power which remained sluggish due to the pandemic.

Retail in Indonesia Market Trends

Online Retailing is Gaining More Traction, Yet Physical Retailing is Dominating the Market

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Indonesians have started embracing digital technology with enthusiasm and are among the world's most avid users of social media. Likewise, Indonesia has a growing digital ecosystem featuring online commerce, media distribution, ride-sharing services, financial services, etc., and also, the country has the leading number of billion-dollar tech startups in the Southeast Asian region, which includes Bukalapak, Tokopedia, Go-Jek, Traveloka, and others. Similarly, the retail sector has started an experienced growth in market share of the online distribution channel during the study period, yet due to customer sentiments and beliefs, physical retailing has dominated the market. Amidst the COVID-19 pandemic, online retailing has become very strong during 2020, which is expected to continue in the forecast period as well, owing to the high adoptability rate and convenience it offers.

Food and Beverage Sector Plays a Vital Role in the Indonesian Economy

The F&B sector plays a vital role in the Indonesian economy. Indonesia's position in the global F&B market is uncertain, as, on the one hand, Indonesia is one of the largest producers of palm oil, fish, cocoa, and coffee, exporting its production surpluses abroad, while on the other hand, Indonesia relies on imports of products that cannot be produced (either at all or insufficient quantity) locally, such as wheat, dairy, or processed food products. Amid the COVID-19 pandemic, the F&B sector has emerged as one of the more resilient pockets of growth in Indonesia's economy. Despite the plunge in demand during the annual Ramadan period as a result of the outbreak, the sector was able to record positive year-on-year growth rates of 3.94% and 0.22% for the first and second quarter of 2020, respectively.

Retail in Indonesia Industry Overview

The report covers major international players operating in the Indonesian retail market. In terms of market share, a few of the major players currently dominate the market. The organized retail market has been growing significantly with companies expanding stores and considering the business potential in new areas. Most of the unorganized retail outlets are increasingly being replaced with big retail hypermarkets, supermarkets, and other retail chains. This is expected to continue on a large scale during the forecast period, which may significantly lead to market growth.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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