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

Market Report | 2025-06-01 | 120 pages | Mordor Intelligence

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Report description:

Indonesia Retail Sector Market Analysis

The Indonesia retail market generated USD 56.88 billion in 2025 and is projected to reach USD 74.69 billion by 2030, reflecting a 5.6% CAGR. Household spending remains the backbone of growth, accounting for 54% of GDP in 2024, while infrastructure roll-outs under the National Medium-Term Development Plan lower cost-to-serve in secondary cities . Digital acceptance keeps expanding as Bank Indonesia's QRIS standard cuts payment friction, and rising smartphone ownership unlocks mobile commerce for millions of first-time shoppers . Modern formats attract capital thanks to liberalized foreign-investment caps, yet the archipelago's fragmented logistics and deep-rooted "warung" culture temper the speed of change. Forward-looking operators pivot toward omnichannel models, invest in data-driven merchandising, and localize assortments for price-sensitive consumers beyond Java.

Indonesia Retail Sector Market Trends and Insights

Rapid Urban-Middle Class Expansion in Tier-2 Indonesian Cities

The urban middle class is surging outside Jakarta. Bappenas estimates 135 million middle-income Indonesians by 2030, reshaping demand in cities such as Surabaya, Semarang, Medan, and Makassar. Toll-road extensions and new airports shorten supply lines, allowing modern grocers to promise same-day replenishment. Indonesia retail market players open smaller mall-anchored stores that tailor assortments to regional tastes, often blending national brands with local snack favorites. Consumer finance firms report double-digit growth in installment sales for household appliances, suggesting a shift toward lifestyle purchases beyond essentials.

Government Push for Cashless Society Accelerating Modern Retail Adoption

Bank Indonesia mandates universal QR acceptance, and 15 million micro-merchants joined QRIS in 2024. In modern chains, cash now accounts for 42.50% of transactions, down from 50% two years earlier. E-wallet providers layer loyalty points and micro-savings into apps, encouraging daily use. Retailers favor cashless transactions for faster checkouts and richer shopper data. With a 90% financial-inclusion target by 2025, regulators invest in digital-literacy drives for rural adults, broadening the addressable pool for mobile commerce.

Persistently High Logistics Costs Across the Archipelago

Moving goods from Java to Maluku can inflate retail prices by 25%, partly because small-parcel routes rely on return-empty trips. Government sea-toll routes alleviate bulk haulage but not last-mile courier rates. As a result, some online retailers apply location-based surcharges, dampening conversion in remote areas. Large chains explore coastal micro-hubs and drone pilot projects, yet meaningful cost relief hinges on multi-modal infrastructure that remains years away.

Other drivers and restraints analyzed in the detailed report include:

Rising Penetration of Affordable Smartphones Driving Mobile-First E-commerce / Domestic FMCG Manufacturers' Shift to Direct-to-Retailer Distribution / Price-Sensitive Consumer Base Limiting Premiumization /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Food and Beverage held the largest 35.16% Indonesia retail market share in 2024, anchored by daily staples and rising demand for ready-to-eat meals. Health, Beauty, and Personal Care leads growth with a 12.8% CAGR, supported by halal certification rules that legitimize local cosmetic brands. In-store dermatology counters combine skin analysis with curated regimes, converting single-item shoppers into basket-builders. Traditional snacks like kripik and tempeh chips gain premium placement within minimarkets, reflecting nostalgic appeal even in modern settings.

Over the forecast horizon, gamified wellness programs within e-wallets reward vitamin purchases, nudging shoppers toward preventive health routines. Consumer Electronics and Appliances benefit from smart-home adoption, particularly energy-saving air conditioners promoted under national efficiency standards. Apparel and Footwear experiments with limited-run drops that sync with TikTok trends, and furniture chains pair modular designs with quick-ship promises, reaching younger families furnishing their first homes.

Retail in the Indonesian Market is Segmented Into by Products (Food and Beverages, Personal and Household Care, and More), by Distribution Channel (Hypermarkets and Supermarkets, Department Stores and More), by Payment Method (Cash, Debit & Credit Cards and More), Region (Greater Jakarta, Rest of Java and More). Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Indomaret (PT Indomarco Prismatama) / Alfamart (PT Sumber Alfaria Trijaya Tbk) / Hypermart & Foodmart (PT Matahari Putra Prima Tbk) / Transmart Carrefour (PT Trans Retail Indonesia) / Hero Supermarket & Guardian (PT Hero Supermarket Tbk) / Mitra Adiperkasa (MAP Group) / Ramayana Department Store (PT Ramayana Lestari Sentosa Tbk) / Lotte Mart Indonesia / Ace Hardware

Indonesia (PT Ace Hardware Indonesia Tbk) / Erajaya Swasembada Tbk / Blibli (PT Global Digital Niaga Tbk) / Tokopedia (PT Tokopedia) / Shopee Indonesia (Sea Ltd) / Lazada Indonesia / Bukalapak Tbk / IKEA Indonesia / Uniqlo Indonesia / Circle K Indonesia / Watsons Indonesia* /

Additional Benefits:

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

Table of Contents:

5.1.4 Home and Furniture
5.1.5 Health, Beauty and Personal Care
5.1.6 Others
5.2 By Distribution Channel
5.2.1 Hypermarkets and Supermarkets
5.2.2 Department Stores
5.2.3 Convenience Stores and Mini-markets
5.2.4 Specialty Stores
5.2.5 Traditional (Warung / Kiosks)
5.2.6 Online
5.3 By Payment Method
5.3.1 Cash
5.3.2 Debit & Credit Cards
5.3.3 E-Wallets
5.3.4 Bank Transfers / Pay-Later
5.4 By Region
5.4.1 Greater Jakarta
5.4.2 Rest of Java
5.4.3 Sumatra
5.4.4 Kalimantan
5.4.5 Sulawesi
5.4.6 Bali & Nusa Tenggara
5.4.7 Papua & Maluku

6 Competitive Landscape
6.1 Market Concentration
6.2 Strategic Moves
6.3 Market Share Analysis
6.4 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products & Services, and Recent Developments)
6.4.1 Indomaret (PT Indomarco Prismatama)
6.4.2 Alfamart (PT Sumber Alfaria Trijaya Tbk)
6.4.3 Hypermart & Foodmart (PT Matahari Putra Prima Tbk)
6.4.4 Transmart Carrefour (PT Trans Retail Indonesia)
6.4.5 Hero Supermarket & Guardian (PT Hero Supermarket Tbk)
6.4.6 Mitra Adiperkasa (MAP Group)
6.4.7 Ramayana Department Store (PT Ramayana Lestari Sentosa Tbk)
6.4.8 Lotte Mart Indonesia
6.4.9 Ace Hardware Indonesia (PT Ace Hardware Indonesia Tbk)
6.4.10 Erajaya Swasembada Tbk
6.4.11 Blibli (PT Global Digital Niaga Tbk)
6.4.12 Tokopedia (PT Tokopedia)
6.4.13 Shopee Indonesia (Sea Ltd)
6.4.14 Lazada Indonesia
6.4.15 Bukalapak Tbk
6.4.16 IKEA Indonesia
6.4.17 Uniqlo Indonesia

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