

Indonesia Retail Report Q4 2010

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Abstracts

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The Q410 BMI Indonesia Retail Report forecasts that the country's retail sales will grow from IDR1.24trn (US\$120.02bn) in 2010 to IDR2.09trn (US\$201.82bn) by 2014. Strong underlying economic growth, the world's fourth-largest population (which is growing), rising per-capita incomes and the continued development of organised retail infrastructure are key factors behind the substantial growth forecast in Indonesian retail sales.

Indonesia's nominal GDP is forecast to be US\$675.57bn in 2010 and BMI predicts average annual GDP growth of 5.7% through to 2014. With the population forecast to increase from 232.5mn in 2010 to 244.7mn by 2014, GDP per capita is predicted to grow 63% by the end of the period, reaching US\$4,732. Our forecast for consumer spending per capita is for an increase from US\$1,450 in 2010 to US\$2,183 in 2014.

Tourism plays a large part in the health of the Indonesian retail industry, with Bali – the jewel in the country's tourism crown – generating 30% of national tourist revenue, an estimated US\$3bn a year. According to government data, salaries of employees in the formal sector have risen by 20% since 1999, with the average wage now standing at IDR2,412,000 (US\$219) per month. These higher-income earners make up about 30% of the total workforce.

Food consumption is forecast to be US\$65.55bn in 2010, rising to an expected US\$97.96bn by 2014, an increase of 47.2%. The mass grocery retail (MGR) sector, which is still developing, will achieve even more substantial growth – BMI forecasts sales to rise by 57.7% to US\$10.44bn by 2014.

Other retail sub-sectors forecast to show healthy growth over the period include

automotives, in which BMI expects sales to increase by 86.5%, from US\$11.32bn in 2010 to US\$21.11bn by 2014. Over-the-counter (OTC) pharmaceutical sales are forecast to grow by just over 62%, from US\$1.47bn in 2010 to US\$2.38bn by 2014. Consumer electronic sales are also predicted to rise about 55%, from US\$6.96bn in 2010 to US\$10.82bn by the end of the forecast period in 2014.

Retail sales for the BMI universe of Asian countries in 2010 are forecast to reach US\$2.66trn. China and India are predicted to account for almost 91% of regional retail sales in 2010 and by 2014 their share of the regional market is expected to be more than 92%. Growth in regional retail sales for 2010-2014 is forecast by BMI at 72.2%, with an annual average of 14%. India should experience the most rapid rate of growth, followed by China. Indonesia's forecast market share of 4.0% in 2010 is expected to be the same in 2014.

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Indonesia Electronics Industry SWOT

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