

Indonesia Retail Report Q1 2016

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Abstracts

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BMI View: Indonesia will stay unabated by regional and global headwinds in the next four years.

The world's fourth largest population will rapidly grow in affluence as the middle class expands by more than 11mn households before 2019.

As a result, a wide range of markets will enjoy positive double-digit growth: from housing and transport to communications to education and health, as Indonesia's boom continues.

Indonesia's large domestic market and favourable demographic profile offer long-term potential to retail investors; however growth will initially be driven by the wealthiest proportion of the population.

Currently 8.2% of all households earn above USD50,000 annually.

The country possesses a rapidly emerging middle class and this will play an incredibly important role in creating a large and capable customer base that will welcome a variety of brands in most retail sub-sectors.

The middle income bracket of USD10,000+ is expected to boom from 19.2% of all households in 2015 to 34.0% by 2019.

This growth is already playing a notable role in modernising the country's retail formats, particularly in urban areas.

We believe this modernisation process will continue to generate a wide range of opportunities for retailers over the forecast period, and beyond, particularly in the mass grocery retail sector (MGR), which remains severely underdeveloped.

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