

Retail in Indonesia

https://marketpublishers.com/r/R210A42528CEN.html Date: May 2024 Pages: 112 Price: US\$ 2,100.00 (Single User License) ID: R210A42528CEN

Abstracts

Retail saw current value growth in Indonesia in 2023. More premium orientated retailers saw particularly strong performances, as their core consumer base was less severely impacted by the economic difficulties seen at the end of the review period. With considerable price inflation across several categories, cost-of-living pressures led to a weakening of middle-to-low income consumers' purchasing power, which, in turn, resulted in a decline in consumption. On the other hand, generally, the middle...

Euromonitor International's Retail in Indonesia report offers insight into key trends and developments driving the industry. The report examines all retail channels to provide sector insight. Channels include hypermarkets, supermarkets, discounters, convenience stores, mixed retailers, health and beauty retailers, clothing and footwear retailers, furniture and furnishing stores, DIY and hardware stores, durable goods retailers, leisure and personal goods retailers. There are profiles of leading retailers, with analysis of their performance and the challenges they face. There is also analysis of non-store retailing: vending; homeshopping; internet retailing; direct selling, as available.

Product coverage: Retail E-Commerce, Retail Offline.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

Why buy this report?

Get a detailed picture of the Retail market;

Pinpoint growth sectors and identify factors driving change;

Understand the competitive environment, the market's major players and



leading brands;

Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop reliable information resources to help drive informed strategic planning.



Contents

Retail in Indonesia Euromonitor International March 2024

LIST OF CONTENTS AND TABLES

RETAIL IN INDONESIA EXECUTIVE SUMMARY Retail in 2023: The big picture Retailer collaborations reap benefits and drive sales growth Warung digitalisation an important element of digital transformation in local retail What next for retail? **OPERATING ENVIRONMENT** Informal retail Opening hours for physical retail Summary 1 Standard Opening Hours by Channel Type 2023 Seasonality Eid al-Fitr/Lebaran School holidays Harbolnas (national online shopping day) Christmas MARKET DATA Table 1 Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2018-2023 Table 2 Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2018-2023 Table 3 Sales in Retail Offline by Channel: Value 2018-2023 Table 4 Sales in Retail Offline by Channel: % Value Growth 2018-2023 Table 5 Retail Offline Outlets by Channel: Units 2018-2023 Table 6 Retail Offline Outlets by Channel: % Unit Growth 2018-2023 Table 7 Sales in Retail E-Commerce by Product: Value 2018-2023 Table 8 Sales in Retail E-Commerce by Product: % Value Growth 2018-2023 Table 9 Grocery Retailers: Value Sales, Outlets and Selling Space 2018-2023 Table 10 Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2018-2023 Table 11 Sales in Grocery Retailers by Channel: Value 2018-2023 Table 12 Sales in Grocery Retailers by Channel: % Value Growth 2018-2023

Table 13 Grocery Retailers Outlets by Channel: Units 2018-2023



Table 14 Grocery Retailers Outlets by Channel: % Unit Growth 2018-2023 Table 15 Non-Grocery Retailers: Value Sales, Outlets and Selling Space 2018-2023 Table 16 Non-Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2018-2023 Table 17 Sales in Non-Grocery Retailers by Channel: Value 2018-2023 Table 18 Sales in Non-Grocery Retailers by Channel: % Value Growth 2018-2023 Table 19 Non-Grocery Retailers Outlets by Channel: Units 2018-2023 Table 20 Non-Grocery Retailers Outlets by Channel: % Unit Growth 2018-2023 Table 21 Retail GBO Company Shares: % Value 2019-2023 Table 22 Retail GBN Brand Shares: % Value 2020-2023 Table 23 Retail Offline GBO Company Shares: % Value 2019-2023 Table 24 Retail Offline GBN Brand Shares: % Value 2020-2023 Table 25 Retail Offline LBN Brand Shares: Outlets 2020-2023 Table 26 Retail E-Commerce GBO Company Shares: % Value 2019-2023 Table 27 Retail E-Commerce GBN Brand Shares: % Value 2020-2023 Table 28 Grocery Retailers GBO Company Shares: % Value 2019-2023 Table 29 Grocery Retailers GBN Brand Shares: % Value 2020-2023 Table 30 Grocery Retailers LBN Brand Shares: Outlets 2020-2023 Table 31 Non-Grocery Retailers GBO Company Shares: % Value 2019-2023 Table 32 Non-Grocery Retailers GBN Brand Shares: % Value 2020-2023 Table 33 Non-Grocery Retailers LBN Brand Shares: Outlets 2020-2023 Table 34 Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2023-2028 Table 35 Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2023-2028

Table 36 Forecast Sales in Retail Offline by Channel: Value 2023-2028

Table 37 Forecast Sales in Retail Offline by Channel: % Value Growth 2023-2028

Table 38 Forecast Retail Offline Outlets by Channel: Units 2023-2028

Table 39 Forecast Retail Offline Outlets by Channel: % Unit Growth 2023-2028

Table 40 Forecast Sales in Retail E-Commerce by Product: Value 2023-2028

Table 41 Forecast Sales in Retail E-Commerce by Product: % Value Growth 2023-2028

Table 42 Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 43 Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Table 44 Forecast Sales in Grocery Retailers by Channel: Value 2023-2028 Table 45 Forecast Sales in Grocery Retailers by Channel: % Value Growth 2023-2028

Table 46 Forecast Grocery Retailers Outlets by Channel: Units 2023-2028

Table 47 Forecast Grocery Retailers Outlets by Channel: % Unit Growth 2023-2028



Table 48 Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 49 Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Table 50 Forecast Sales in Non-Grocery Retailers by Channel: Value 2023-2028Table 51 Forecast Sales in Non-Grocery Retailers by Channel: % Value Growth2023-2028

Table 52 Forecast Non-Grocery Retailers Outlets by Channel: Units 2023-2028 Table 53 Forecast Non-Grocery Retailers Outlets by Channel: % Unit Growth 2023-2028 DISCLAIMER SOURCES

Summary 2 Research Sources CONVENIENCE RETAILERS IN INDONESIA KEY DATA FINDINGS

2023 DEVELOPMENTS

Increasing urbanisation, convenience, and wide selection of products contribute to growth

Halal certification for convenience stores benefits retailers and gains consumers' trust Alfamart usurps Indomaret to become leading player

PROSPECTS AND OPPORTUNITIES

Convenience retailers forecast to thrive due to compatibility with evolving trends Expansion into other high-potential cities a strategy to increase sales

Indomaret strengthened its positioning through expansion and development in both offline and online platforms

CHANNEL DATA

Table 54 Convenience Retailers: Value Sales, Outlets and Selling Space 2018-2023 Table 55 Convenience Retailers: Value Sales, Outlets and Selling Space: % Growth 2018-2023

 Table 56 Sales in Convenience Retailers by Channel: Value 2018-2023

Table 57 Sales in Convenience Retailers by Channel: % Value Growth 2018-2023

Table 58 Convenience Retailers GBO Company Shares: % Value 2019-2023

Table 59 Convenience Retailers GBN Brand Shares: % Value 2020-2023

Table 60 Convenience Retailers LBN Brand Shares: Outlets 2020-2023

Table 61 Convenience Retailers Forecasts: Value Sales, Outlets and Selling Space2023-2028

Table 62 Convenience Retailers Forecasts: Value Sales, Outlets and Selling Space: %



Growth 2023-2028

Table 63 Forecast Sales in Convenience Retailers by Channel: Value 2023-2028 Table 64 Forecast Sales in Convenience Retailers by Channel: % Value Growth 2023-2028 HYPERMARKETS IN INDONESIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Hypermarkets struggle for a variety of reasons

Collaboration with other parties amongst operational strategies of market players Continued closures of Transmart outlets due to channel shifts and uncompetitive pricing PROSPECTS AND OPPORTUNITIES

Hypermarkets to face challenges over the forecast period due to unfavourable channel shifts

Competition across retail channels to drive evolution of business concepts within hypermarkets and beyond

Collaborating with Bukalapak and Grab, Transmart is expanding the reach of its online business and developing its strategies

CHANNEL DATA

 Table 65 Hypermarkets: Value Sales, Outlets and Selling Space 2018-2023

Table 66 Hypermarkets: Value Sales, Outlets and Selling Space: % Growth 2018-2023 Table 67 Hypermarkets GBO Company Shares: % Value 2019-2023

Table 68 Hypermarkets GBN Brand Shares: % Value 2020-2023

Table 69 Hypermarkets LBN Brand Shares: Outlets 2020-2023

Table 70 Hypermarkets Forecasts: Value Sales, Outlets and Selling Space 2023-2028 Table 71 Hypermarkets Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

SUPERMARKETS IN INDONESIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rise in premium supermarkets driven by the preferences of higher income segments Special events by supermarket players to attract more new consumers and generate loyalty

As supermarkets cater to a slightly different target market, pricing is less of an issue PROSPECTS AND OPPORTUNITIES

Fresh produce key to competitive position of supermarkets



Innovation influencing development of competitive landscape Themed events and collaborations key to innovation in experiential retail in the supermarkets channel CHANNEL DATA Table 72 Supermarkets: Value Sales, Outlets and Selling Space 2018-2023 Table 73 Supermarkets: Value Sales, Outlets and Selling Space: % Growth 2018-2023 Table 74 Supermarkets GBO Company Shares: % Value 2019-2023 Table 75 Supermarkets GBN Brand Shares: % Value 2020-2023 Table 76 Supermarkets LBN Brand Shares: Outlets 2020-2023 Table 77 Supermarkets Forecasts: Value Sales, Outlets and Selling Space 2023-2028 Table 78 Supermarkets Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028 SMALL LOCAL GROCERS IN INDONESIA KEY DATA FINDINGS

2023 DEVELOPMENTS

Government support is the most prominent and effective aid for small local grocers Warung digitalisation to help small local grocers develop a more competitive edge Tangerang City launches Warung Qta, a digitalised format of warung PROSPECTS AND OPPORTUNITIES

Small local grocers a beneficiary of support from the government and digital platforms Bukalapak continues to expand its warung digitalisation reach through its Mitra Bukalapak programme

Warung Madura - a niche within small local grocers that can be as competitive as convenience stores

CHANNEL DATA

Table 79 Small Local Grocers: Value Sales, Outlets and Selling Space 2018-2023 Table 80 Small Local Grocers: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 81 Small Local Grocers GBO Company Shares: % Value 2019-2023

Table 82 Small Local Grocers GBN Brand Shares: % Value 2020-2023

 Table 83 Small Local Grocers LBN Brand Shares: Outlets 2020-2023

Table 84 Small Local Grocers Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 85 Small Local Grocers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

APPAREL AND FOOTWEAR SPECIALISTS IN INDONESIA KEY DATA FINDINGS



2023 DEVELOPMENTS

Trend towards players working to enhance consumer experience through new store concepts First premium factory outlet opens in Indonesia Mitra Adi Perkasa retains its leading position PROSPECTS AND OPPORTUNITIES Uniglo presents new collections in support of sustainability as fast fashion grows Cole Haan shows its commitment to sustainability through the Mission Green campaign Limited collection products can be a strategy to trigger hype and generate interest amongst consumers CHANNEL DATA Table 86 Apparel and Footwear Specialists: Value Sales, Outlets and Selling Space 2018-2023 Table 87 Apparel and Footwear Specialists: Value Sales, Outlets and Selling Space: % Growth 2018-2023 Table 88 Apparel and Footwear Specialists GBO Company Shares: % Value 2019-2023 Table 89 Apparel and Footwear Specialists GBN Brand Shares: % Value 2020-2023 Table 90 Apparel and Footwear Specialists LBN Brand Shares: Outlets 2020-2023 Table 91 Apparel and Footwear Specialists Forecasts: Value Sales, Outlets and Selling Space 2023-2028 Table 92 Apparel and Footwear Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028 APPLIANCES AND ELECTRONICS SPECIALISTS IN INDONESIA **KEY DATA FINDINGS** 2023 DEVELOPMENTS

Despite shift to e-commerce, consumers still prefer to purchase some products in physical stores

Trend of diversifying product portfolio seen within the channel

Erajaya Swasembada takes a more expansive approach in terms of its retail offer PROSPECTS AND OPPORTUNITIES

Appliances and electronics specialists forecast to see continued growth due to sticky consumer habits

Electronic City Indonesia plans to include EV business across its stores

Yamada Best Indonesia is innovating on store formats and product range to stay competitive



CHANNEL DATA

Table 93 Appliances and Electronics Specialists: Value Sales, Outlets and Selling Space 2018-2023 Table 94 Appliances and Electronics Specialists: Value Sales, Outlets and Selling

Table 94 Appliances and Electronics Specialists: Value Sales, Outlets and SellingSpace: % Growth 2018-2023

Table 95 Appliances and Electronics Specialists GBO Company Shares: % Value 2019-2023

Table 96 Appliances and Electronics Specialists GBN Brand Shares: % Value 2020-2023

Table 97 Appliances and Electronics Specialists LBN Brand Shares: Outlets 2020-2023 Table 98 Appliances and Electronics Specialists Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 99 Appliances and Electronics Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

HEALTH AND BEAUTY SPECIALISTS IN INDONESIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Health and beauty specialists are growing well in line with healthy growth in demand for beauty and personal care products in Indonesia

Advertising and themed events help to drive sales of health and beauty specialists Kimia Farma Apotek retains the lead, while health and beauty specialists benefit from long term trend for beauty and skin care

PROSPECTS AND OPPORTUNITIES

Ongoing health and wellness trend to boost demand

Aeon Store diversifies its portfolio by launching Aeon Health & Beauty concept, Hero group is focusing on multiple strategies for Guardian

Mybestie, a newcomer in the health and beauty specialist channel, expands through franchise programme

CHANNEL DATA

Table 100 Health and Beauty Specialists: Value Sales, Outlets and Selling Space 2018-2023

Table 101 Health and Beauty Specialists: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 102 Sales in Health and Beauty Specialists by Channel: Value 2018-2023Table 103 Sales in Health and Beauty Specialists by Channel: % Value Growth2018-2023

Table 104 Health and Beauty Specialists GBO Company Shares: % Value 2019-2023



Table 105 Health and Beauty Specialists GBN Brand Shares: % Value 2020-2023 Table 106 Health and Beauty Specialists LBN Brand Shares: Outlets 2020-2023 Table 107 Health and Beauty Specialists Forecasts: Value Sales, Outlets and Selling Space 2023-2028 Table 108 Health and Beauty Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028 Table 109 Forecast Sales in Health and Beauty Specialists by Channel: Value 2023-2028 Table 110 Forecast Sales in Health and Beauty Specialists by Channel: % Value Growth 2023-2028 HOME PRODUCTS SPECIALISTS IN INDONESIA KEY DATA FINDINGS

2023 DEVELOPMENTS

Trend of mindful luxury consumption in home products

Indonesia Design District comprising home products specialists stores launched in PIK 2 area

Ace Hardware stays out in front

PROSPECTS AND OPPORTUNITIES

Seamless omnichannel innovation at Ace Hardware Indonesia

Katta furniture launches its first store with experiential retail and high-end product lines Outlet expansion a key strategy for players looking to extend their reach to consumers CHANNEL DATA

Table 111 Home Products Specialists: Value Sales, Outlets and Selling Space2018-2023

Table 112 Home Products Specialists: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 113 Sales in Home Products Specialists by Channel: Value 2018-2023

Table 114 Sales in Home Products Specialists by Channel: % Value Growth 2018-2023

Table 115 Home Products Specialists GBO Company Shares: % Value 2019-2023

Table 116 Home Products Specialists GBN Brand Shares: % Value 2020-2023

Table 117 Home Products Specialists LBN Brand Shares: Outlets 2020-2023

Table 118 Home Products Specialists Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 119 Home Products Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Table 120 Forecast Sales in Home Products Specialists by Channel: Value 2023-2028Table 121 Forecast Sales in Home Products Specialists by Channel: % Value Growth



2023-2028 GENERAL MERCHANDISE STORES IN INDONESIA KEY DATA FINDINGS

2023 DEVELOPMENTS

Players increasingly combine physical and digital channels in response to pandemic driven shifts in purchasing behaviour

Comprehensive retail concept and product selections important in driving sales Matahari Department Store retains lead, while Miniso's share grows

PROSPECTS AND OPPORTUNITIES

General merchandise stores forecast to see growth driven by store format innovation and expansion of variety stores

Department store players put efforts into maximising omnichannel strategies Special events with promotions and discounts represent a strategy for players to drive sales

CHANNEL DATA

Table 122 General Merchandise Stores: Value Sales, Outlets and Selling Space 2018-2023

Table 123 General Merchandise Stores: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 124 Sales in General Merchandise Stores by Channel: Value 2018-2023 Table 125 Sales in General Merchandise Stores by Channel: % Value Growth 2018-2023

Table 126 General Merchandise Stores GBO Company Shares: % Value 2019-2023

Table 127 General Merchandise Stores GBN Brand Shares: % Value 2020-2023

Table 128 General Merchandise Stores LBN Brand Shares: Outlets 2020-2023

Table 129 General Merchandise Stores Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 130 General Merchandise Stores Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Table 131 Forecast Sales in General Merchandise Stores by Channel: Value 2023-2028 Table 132 Forecast Sales in General Merchandise Stores by Channel: % Value Growth 2023-2028

DIRECT SELLING IN INDONESIA KEY DATA FINDINGS

2023 DEVELOPMENTS



Direct selling suffering due to shift in purchasing habits and consumer preferences Beauty and skin care products performing relatively well Citra Nusa Insan Cemerlang exits the direct selling industry in Indonesia PROSPECTS AND OPPORTUNITIES Direct selling to see growth, but continues to face challenge of shift in consumer shopping preferences Oriflame innovates in terms of its products and sales channel in order to stay competitive Players focusing more on beauty products CHANNEL DATA Table 133 Direct Selling by Product: Value 2018-2023 Table 134 Direct Selling by Product: % Value Growth 2018-2023 Table 135 Direct Selling GBO Company Shares: % Value 2019-2023 Table 136 Direct Selling GBN Brand Shares: % Value 2020-2023 Table 137 Direct Selling Forecasts by Product: Value 2023-2028 Table 138 Direct Selling Forecasts by Product: % Value Growth 2023-2028 **RETAIL E-COMMERCE IN INDONESIA KEY DATA FINDINGS**

2023 DEVELOPMENTS

Government support provides a significant push for industry growth Fashion and beauty products key categories driving growth in retail e-commerce Shopee launches Shopee Finest segment, spotlighting premium product ranges PROSPECTS AND OPPORTUNITIES E-commerce is expected to see healthy growth over forecast period due to initiatives, investments and sticky consumer habits Tokopedia tapping into the financial/banking segment by launching Tokopedia Visa Credit Card Characteristics of TikTok Shop and TikTok Live work like a charm in driving ecommerce sales CHANNEL DATA Table 139 Retail E-Commerce by Channel: Value 2017-2022 Table 140 Retail E-Commerce by Channel: % Value Growth 2017-2022 Table 141 Retail E-Commerce by Product: Value 2017-2022 Table 142 Retail E-Commerce by Product: % Value Growth 2017-2022 Table 143 Retail E-Commerce GBO Company Shares: % Value 2018-2022 Table 144 Retail E-Commerce GBN Brand Shares: % Value 2019-2022 Table 145 Forecast Retail E-Commerce by Channel: Value 2022-2027



Table 146 Forecast Retail E-Commerce by Channel: % Value Growth 2022-2027Table 147 Forecast Retail E-Commerce by Product: Value 2022-2027Table 148 Forecast Retail E-Commerce by Product: % Value Growth 2022-2027



I would like to order

Product name: Retail in Indonesia

Product link: https://marketpublishers.com/r/R210A42528CEN.html

Price: US\$ 2,100.00 (Single User License / Electronic Delivery) If you want to order Corporate License or Hard Copy, please, contact our Customer Service: <u>info@marketpublishers.com</u>

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <u>https://marketpublishers.com/r/R210A42528CEN.html</u>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name: Last name: Email: Company: Address: City: Zip code: Country: Tel: Fax: Your message:

**All fields are required

Custumer signature _____

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <u>https://marketpublishers.com/docs/terms.html</u>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970