



Euromonitor
International

Small Local Grocers in Indonesia

March 2025

Table of Contents

KEY DATA FINDINGS

2024 DEVELOPMENTS

Value growth but low-income consumers segment tend to trade down towards lower product quality

Warung Maduras benefit from various advantages

Food sales still the biggest contributor to value

PROSPECTS AND OPPORTUNITIES

Convenience stores' expansion to suburban areas a key challenge

Daily food and drink commodities still the most sought after products, with sachet sizes set to make a big contribution

Stagnant outlet numbers, but stores located far from convenience stores will survive

CHANNEL DATA

Table 1 - Small Local Grocers: Value Sales, Outlets and Selling Space 2019-2024

Table 2 - Small Local Grocers: Value Sales, Outlets and Selling Space: % Growth 2019-2024

Table 3 - Small Local Grocers GBO Company Shares: % Value 2020-2024

Table 4 - Small Local Grocers GBN Brand Shares: % Value 2021-2024

Table 5 - Small Local Grocers LBN Brand Shares: Outlets 2021-2024

Table 6 - Small Local Grocers Forecasts: Value Sales, Outlets and Selling Space 2024-2029

Table 7 - Small Local Grocers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029

Retail in Indonesia - Industry Overview

EXECUTIVE SUMMARY

Retail in 2024: Resilient growth amidst a challenging operating environment

Outlet numbers stagnate in Indonesian retail

Different strategies offered by grocery retailers and non-grocery retailers

What next for retail?

OPERATING ENVIRONMENT

Informal retail

Opening hours for physical retail

Summary 1 - Standard Opening Hours by Channel Type 2024

Seasonality

Eid al-Fitr/Lebaran

School holidays

Harbolnas (national online shopping day)

Christmas

MARKET DATA

Table 8 - Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2019-2024

Table 9 - Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2019-2024

Table 10 - Sales in Retail Offline by Channel: Value 2019-2024

Table 11 - Sales in Retail Offline by Channel: % Value Growth 2019-2024

Table 12 - Retail Offline Outlets by Channel: Units 2019-2024

Table 13 - Retail Offline Outlets by Channel: % Unit Growth 2019-2024

Table 14 - Sales in Retail E-Commerce by Product: Value 2019-2024

Table 15 - Sales in Retail E-Commerce by Product: % Value Growth 2019-2024

Table 16 - Grocery Retailers: Value Sales, Outlets and Selling Space 2019-2024

Table 17 - Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2019-2024

Table 18 - Sales in Grocery Retailers by Channel: Value 2019-2024

Table 19 - Sales in Grocery Retailers by Channel: % Value Growth 2019-2024

Table 20 - Grocery Retailers Outlets by Channel: Units 2019-2024

Table 21 - Grocery Retailers Outlets by Channel: % Unit Growth 2019-2024

Table 22 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space 2019-2024

Table 23 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2019-2024

Table 24 - Sales in Non-Grocery Retailers by Channel: Value 2019-2024

Table 25 - Sales in Non-Grocery Retailers by Channel: % Value Growth 2019-2024

Table 26 - Non-Grocery Retailers Outlets by Channel: Units 2019-2024

Table 27 - Non-Grocery Retailers Outlets by Channel: % Unit Growth 2019-2024

Table 28 - Retail GBO Company Shares: % Value 2020-2024

Table 29 - Retail GBN Brand Shares: % Value 2021-2024

Table 30 - Retail Offline GBO Company Shares: % Value 2020-2024

Table 31 - Retail Offline GBN Brand Shares: % Value 2021-2024

Table 32 - Retail Offline LBN Brand Shares: Outlets 2021-2024

Table 33 - Retail E-Commerce GBO Company Shares: % Value 2020-2024

Table 34 - Retail E-Commerce GBN Brand Shares: % Value 2021-2024

Table 35 - Grocery Retailers GBO Company Shares: % Value 2020-2024

Table 36 - Grocery Retailers GBN Brand Shares: % Value 2021-2024

Table 37 - Grocery Retailers LBN Brand Shares: Outlets 2021-2024

Table 38 - Non-Grocery Retailers GBO Company Shares: % Value 2020-2024

Table 39 - Non-Grocery Retailers GBN Brand Shares: % Value 2021-2024

Table 40 - Non-Grocery Retailers LBN Brand Shares: Outlets 2021-2024

Table 41 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2024-2029

Table 42 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2024-2029

Table 43 - Forecast Sales in Retail Offline by Channel: Value 2024-2029

Table 44 - Forecast Sales in Retail Offline by Channel: % Value Growth 2024-2029

Table 45 - Forecast Retail Offline Outlets by Channel: Units 2024-2029

Table 46 - Forecast Retail Offline Outlets by Channel: % Unit Growth 2024-2029

Table 47 - Forecast Sales in Retail E-Commerce by Product: Value 2024-2029

Table 48 - Forecast Sales in Retail E-Commerce by Product: % Value Growth 2024-2029

Table 49 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2024-2029

Table 50 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029

Table 51 - Forecast Sales in Grocery Retailers by Channel: Value 2024-2029

Table 52 - Forecast Sales in Grocery Retailers by Channel: % Value Growth 2024-2029

Table 53 - Forecast Grocery Retailers Outlets by Channel: Units 2024-2029

Table 54 - Forecast Grocery Retailers Outlets by Channel: % Unit Growth 2024-2029

Table 55 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2024-2029

Table 56 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029

Table 57 - Forecast Sales in Non-Grocery Retailers by Channel: Value 2024-2029

Table 58 - Forecast Sales in Non-Grocery Retailers by Channel: % Value Growth 2024-2029

Table 59 - Forecast Non-Grocery Retailers Outlets by Channel: Units 2024-2029

Table 60 - Forecast Non-Grocery Retailers Outlets by Channel: % Unit Growth 2024-2029

DISCLAIMER

SOURCES

Summary 2 - Research Sources

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover

a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/small-local-grocers-in-indonesia/report.