

INDONESIA



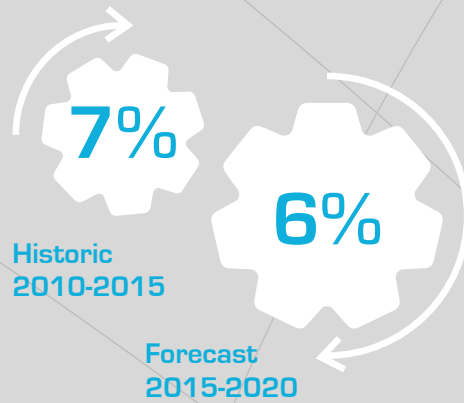
Indonesia

Retail market size,
in US\$ billion

24 US\$

Indonesia makes up 4% of total Asia Pacific packaged food sales and has been growing ahead of the region over the past five years. Staple accounts for the biggest share of stomach. Half of staple sales come from rice.

Retail CAGR (real) fixed US\$



Retail market size,
in US \$billion



12 Staples



5 Dairy



5 Snacks



2 Meals

Share of Modern Grocery



Modern grocery is still in its infancy. Traditional retailers, in particular independent local shops are key to driving value in the Indonesian market.



Indonesia

MARKET SHARE Top food players in 2015

Indofood
THE SYMBOL OF QUALITY FOODS

10.1%



4.2%



3.8%



3.5%



Indonesia

KEY TRENDS

VOLUME GROWTH STAYS RESPECTABLE ALBEIT DECELERATING

Improvements in consumer knowledge and understanding of products in packaged food.

MODERN GROCERY RETAILERS HELPS TO BOOST SALES

Convenience stores chains such as Indomaret, Alfamart and Circle K even expanding into Indonesia's smaller cities.

PACKAGED FOOD IS SET TO POST RESPECTABLE GROWTH

The industry has the potential to become increasingly competitive between the 2015 - 2020 period.



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FASTEST GROWING CATEGORY

% CAGR growth 2010 - 2015

Processed Meat and Seafood 17.9%

Processed meat and seafood sees strong growth partly thanks to the rapid expansion of modern retailers.



Ice Cream and Frozen Desserts 17.4%

Large investments in new launches and promotions help fuel volume growth.



Breakfast Cereals 16.6%

The rising popularity of Western culture and growing health consciousness drive growth.

