



Euromonitor
International

Small Local Grocers in Indonesia

March 2025

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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

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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
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- Seasonality
- Eid al-Fitr/Lebaran
- School holidays
- Harbolnas (national online shopping day)
- Christmas

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