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Report Name: Food Service - Hotel Restaurant Institutional

Country: Indonesia

Post: Jakarta

Report Category: Food Service - Hotel Restaurant Institutional

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Report Highlights:

In 2022, the Indonesian foodservice industry was valued at \$29 billion, an almost 30 percent increase from the previous year, making it the largest foodservice market in Southeast Asia. The value of food service sales rebounded in 2022 but fell short of reaching pre-pandemic levels. Most of the leading foodservice players are American fast-food chains such as McDonald's, KFC, Pizza Hut, and Starbucks. U.S. food export prospects in this market include cheese, frozen potatoes, beef, fruits, pork, wine, and tree nut products, mostly used by international hotel chains, high-end restaurants, and international fast-food chains.

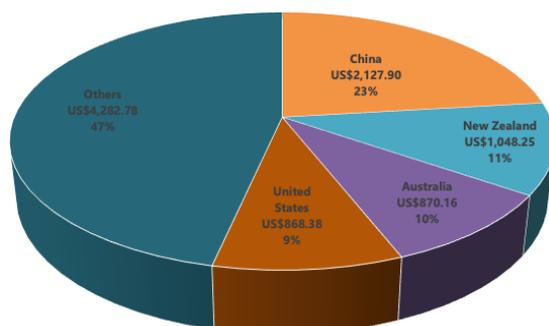
Post: Jakarta

Market Fact Sheet: Indonesia

Executive Summary

Indonesia is the fourth most populous nation in the world, with a population of approximately 276 million in 2022. Fifty-six percent of the population lives on Java Island, one of the most densely populated areas in the world. In 2022, Indonesia's GDP reached \$1,319 billion and GDP per capita reached \$4,784 (est.). Indonesia is a major producer of rubber, palm oil, coffee, and cocoa. In 2022, agricultural imports reached \$28.4 billion, consisting of \$9.2 billion of consumer-oriented products. Soybeans and wheat are the top imports from the United States. Agricultural self-sufficiency is a stated goal of the Indonesian government and is often used to justify trade barriers and restrictions.

Top Consumer – Oriented Product Suppliers to Indonesia, 2022 (million USD)



Source: Trade Date Monitor LLC

Food Processing Industry

The food processing industry is comprised of approximately 8,556 large and medium-sized producers; 1.6 million are considered micro and small-scale producers. Most of the products are consumed domestically (mostly retail) and the market is considered highly competitive.

Food Retail Industry

Indonesian grocery retail sales reached \$91 billion in 2022 (traditional grocery retailers held 77 percent of the market share). Retail sales are driven by rising levels of affluence, particularly in urban areas, where a growing number of middle-to upper-income consumers are purchasing higher quality, premium products.

Food Service Industry

The foodservice sector's total contribution to GDP totaled nearly \$32 billion in 2022. The sector is dominated by small restaurants and street-side restaurants known as *warungs*.

Quick Facts CY 2022

Consumer-Oriented Product Imports: \$9.2 billion
U.S. Share (9%) – \$868 million

Top 10 Growth Products:

- | | |
|--------------------|---------------------------------|
| 1) dairy products | 6) snacks |
| 2) baked goods | 7) sauces |
| 3) baby food | 8) dressings & condiments |
| 4) confectioneries | 9) sweet biscuits |
| 5) frozen food | 10) ice cream & frozen desserts |

Food Industry by Channels (U.S. billion) 2022

| | |
|--|------|
| Food Exports | \$45 |
| Food Imports | \$7 |
| Modern Grocery Retail | \$21 |
| Food Service | \$29 |
| Food E-commerce | \$3 |
| Traditional Market (small local grocers) | \$70 |

Food Industry (GDP): \$83.1 billion (2022)

Top 10 Retailers

Alfamart, Indomaret, Alfa Midi, Hypermart, Superindo, Transmart/Carrefour, Circle K, Lotte Mart, Farmer's Market, Hero

GDP/Population 2022

Population (millions): 276

GDP: \$1,319 billion

Source: Statistics Indonesia (BPS), Trade Data Monitor LLC and Euromonitor International

Strength/Weakness/Opportunities/Challenges

| Strengths | Weaknesses |
|--|---|
| Large Consumer Base | Inadequate infrastructure, including ports and cold storage facilities outside of the main island of Java |
| Opportunities | Challenges |
| Rapid growth of the retail sector; Japanese, Korean, and Western restaurant chains; bakeries; expanding online sales platforms; and increasing export demand for processed products. | Challenging business climate, and unpredictable regulatory environment. |

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SECTION I. MARKET SUMMARY

With a number of advantages, including a growing young and working population, and a large domestic market, Indonesia presents excellent business opportunities for international and local foodservice players. Indonesia is the largest food service market among ASEAN countries. In 2022, the Indonesian hotel, restaurant, and institutional sector's value totaled \$29 billion, up almost 30 percent from 2021. The value of food service sales rebounded in 2022 but did not reach pre-pandemic levels.

Full-service restaurants accounted for 82 percent of total foodservice sales, followed by fast food (7 percent), cafés/bars (6 percent) and street stalls (4 percent).

Current trends in Indonesia's foodservice industry include:

- **Fast-food chains.** KFC, McDonald's, and Pizza Hut dominate the fast-food chain sector in Indonesia. In 2022, international fast-food chains opened new outlets in primary and secondary cities to expand their network coverage, including McDonald's, KFC and Pizza Hut. In 2023, two additional American fast-food chains opened in Indonesia, Popeyes and Long John Silver's. The re-opening of Popeye's chicken in Indonesia was a strategic expansion by Restaurant Brands Asia, catering to growing consumer demand for fried chicken.¹
- **Healthy restaurant concepts and plant-based food.** In recent years, new restaurants that offer healthy restaurant concepts have sprung up in Jakarta and other prominent cities. KFC's 'Naughty by Nature' outlets in Jakarta offer healthier side options to consume with their fried chicken such as salads. Burger King has added a plant-based Whopper to its menu in Indonesia, made with a vegan beef patty supplied by Unilever. Other restaurant chains that offer healthier menu items include [Saladstop!](#), [Burgreens](#), and [Green Rebel](#) which has partnered with other stores like Ikea and Starbucks. These restaurants use imported ingredients such as meat, almonds, chickpeas, salmon, seafood, nuts, etc. As Indonesian consumers continue to develop new habits and food preferences, the healthy restaurant concepts with plant-based alternatives will expand in the coming years.
- **Digitalization & Cloud Kitchens.** Indonesia's digital foodservice has been growing rapidly, which enabled the continuation of foodservice sales during the COVID-19 pandemic. Currently, "super-apps" such as GoFood and GrabFood dominate the delivery service and online orders, expanding into second-tier cities and partnering with most popular restaurant chains, including international and local brands. With the increasing demand in online food delivery, the concept of cloud kitchens has also emerged, giving restaurants access to prime locations at an efficient cost. Companies such as GoFood, Rebel Foods, Hangry, and GrabFood have already entered the cloud kitchen market in Indonesia, expanding their operations and opening new cloud kitchens in various cities across Indonesia to meet the growing demand for food delivery services.² In 2022, GoFood's 'Dapur Bersama' (Cloud Kitchen) presence grew by 170 percent in one year, resulting in a total of 73 locations in 12 major cities across Indonesia. Meanwhile, the number of GoFood merchant partners in Indonesia increased by 45 percent compared to the previous year³.

¹ <https://hospitality.economicstimes.indiatimes.com/news/restaurants/restaurants-brand-asia-launches-popeyes-in-indonesia/96968433>

² <https://www.mordorintelligence.com/industry-reports/indonesia-foodservice-market>

³ <https://www.gotocompany.com/en/news/press/gofood-records-significant-growth-in-transaction-value-more-than-twice-ofd-industry-average-focuses-on-loyal-users>

- **Specialty coffee shop chains and cafés.** The number of coffee shop chains in Indonesia has been continuously growing since 2018, despite the COVID-19 pandemic. In Indonesia, frequenting such venues is currently a major trend amongst middle- to high-income consumers, especially younger generations. The coffee chain Kopi Kenangan alone has grown to more than 900 outlets in 2022 from 500 in 2021.
- **Bakery shops.** The growth of premium bakery shops in Indonesia offering a wide variety of artisanal breads, desserts, and pastries is driven by millennials and consumers who are increasingly adopting a westernized culinary lifestyle. In 2021, South Korean bakery giant Paris Baguette opened its first store in Jakarta and opened six more in 2022⁴. Local premium bakery chains are also expanding. For example, Monsieur Spoon recently expanded outlets outside Bali Island and has become one of the top go-to French-style bakeries in Jakarta and Bali.

Table 1. Key Economic Data

| Year | 2018 | 2019 | 2020 | 2021 | 2022 |
|---|-------|-------|-------|-------|-------|
| GDP (\$billion) * | 1,042 | 1,120 | 1,059 | 1,185 | 1,319 |
| Economic Growth (%) | 5.2 | 5.0 | -2.1 | 3.7 | 5.31 |
| Value of F&B Service Activity (\$billion) | 29 | 31 | 28 | 29 | 30 |

Source: [Central Bank of Indonesia](https://www.bi.go.id/)

*GDP at market prices

Table 2. Indonesia: Advantages and Challenges for U.S. HRI Food Products

| Advantages | Challenges |
|--|---|
| Population of 276 million, 57 percent urbanization, and 31 percent millennials and 24 percent Gen Z, growing middle class creating strong demand and potential for imported agricultural products. | Competition from similar imported products from Australia, New Zealand, and the People’s Republic of China (PRC) which may enter duty-free. |
| Consumers are increasingly seeking new and unique products and tastes beyond traditional local cuisines. | |
| International restaurants, hotel chains, boutique hotels, and specialized cafés are increasingly using high-quality imported products such as meat, pork, wine, cheese, fruits, etc. | Animal based products must have an import recommendation from the MoA, product registration from The National Agency for Drug and Food Control (BPOM) as well as an import permit from the MOT. |
| U.S. food products have an excellent reputation and considered high- quality, healthy, and consistently available. | Imported products are more expensive compared to domestic goods. |
| Indonesia has a strong “dine-out” and domestic travel culture. | The availability of U.S. foods is limited to restaurants, which are in first and second tier cities. |

⁴ <https://www.koreaherald.com/view.php?ud=20220324000380>

SECTION II. ROAD MAP FOR MARKET ENTRY

A. Entry Strategy

There are several well-attended food shows in Indonesia which provide great opportunities to offer new-to-market products and are good first-step market entry venues (see Table 3). In addition, the following reports or websites provide useful information on import regulations, market entry guidance, and import duties:

1. [Food and Agricultural Import Regulations and Standards - Annual Report 2022](#)- This report provides information on Indonesia’s import requirements for food and agricultural products.
2. [Food and Agricultural Import Regulations and Standards - Export Certificate 2022](#) - This report provides information on certificates required to export food and agricultural products to Indonesia
3. [Exporter Guide 2022](#) - This is a useful tool for new-to-export companies which provides an overview of the market dynamics and trends and practical tips on doing business in Indonesia.
4. [Indonesia Halal Overview](#) - This report provides an overview of relevant regulations, decrees, and standards related to halal certification and the implementation of Indonesia’s 2014 Halal Law.
5. [Guide to Re-selling Containerized Cargo After Arrival](#) - This report provides an overview of the general procedures for re-selling containerized cargo after arrival to Indonesia.
6. [Tariffs and FTAs Information - Based on HS Code](#)
7. Approved U.S. establishments: [Dairy Products](#), [Meat Products](#)
8. [U.S. Dairy Plant Registration Guidelines](#) – this report provides information on the questionnaire/process required to apply for approval to export U.S. dairy products.

Table 3. Trade Shows in Indonesia

| Name of Event | Location | Dates of Event | Website |
|----------------------------------|----------|-----------------------|---|
| SIAL Interfood 2023 | Jakarta | 8 - 11 November, 2023 | https://sialinterfood.com/ |
| Food, Hotel & Tourism Bali, 2024 | Bali | 6 – 8 March, 2024 | https://www.fhtbali.com/ |
| Food and Hotel Indonesia 2024 | Jakarta | 23 – 26 July 2024 | www.foodhotelindonesia.com |
| Food Ingredients Asia 2023 | Jakarta | 4 - 6 September, 2024 | https://www.figlobal.com/asia-indonesia/en/home.html |

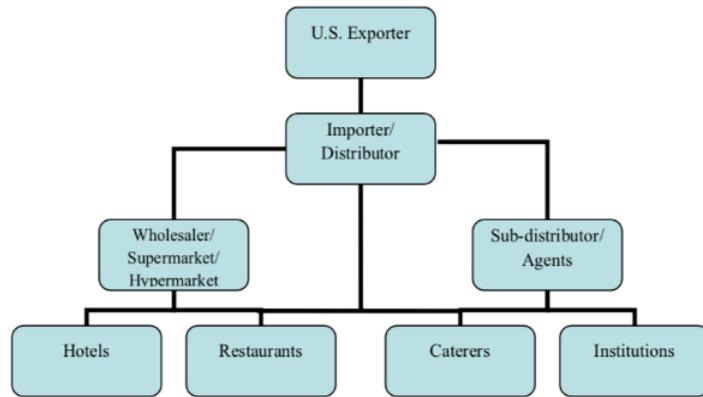
B. Distribution

Many imported products for the HRI industry enter Indonesia through reputable local importers or distributor agents. They represent imported products, obtain import licenses and permits, understand customs clearance procedures, and distribute products all over Indonesia.

C. Sub-Sector Profile

Jakarta and Bali remain the ideal locations to target the HRI food service sector. These cities are home to many international hotels and restaurants that cater to sizeable expatriate communities, foreign visitors, and high-income consumers. Bali remains the ‘trendsetter’ in specialized cafés, hotel chains, and restaurants. Other large cities such as Surabaya, Bandung, Medan, Batam, Balikpapan, Lombok, and Makassar also have potential for import growth.

Indonesia: HRI Sector Distribution Channels



Hotel

The number of hotels in Indonesia increased significantly from 16,685 to 29,742 hotels, offering 788,982 rooms (2013 – 2022). Although most international hotel chains are in Jakarta, Bali, Bandung, Surabaya, Yogyakarta, and Medan, more are expanding into secondary cities due to infrastructure development and the promotion of new tourist destinations.

Major hotel operators in Indonesia:

- **Accor** (more than 130 hotels), brands: Raffles, Grand Mercure, Pullman, Banyan Tree, Sofitel, Fairmont, Novotel, Ibis, and All Seasons etc.
- **Archipelago International** (more than 145 hotels), brands: Grand Aston, The Alana, Hotel Neo, Favehotels, Aston Heritage Collection, Quest Hotels, Huxley, Kamuela and Harper etc.
- **Starwood** (49 hotels), brands: The Bulgari Resort Bali, The Ritz-Carlton, Courtyard, JW Marriot, St. Regis, Westin, Sheraton, Le Meridien, Four Points, Loft, etc.
- **Swiss-bel hotel** (more than 30 hotels), brands: Swiss-Bel, Zest, Ciputra World etc.
- **Hilton** (6 hotels), brands: DoubleTree, Hilton, Conrad, Hilton Garden Inn etc.

Table 4. Number of hotels and rooms in Indonesia, 2020 - 2022

| Hotel | 2020 | | 2021 | | 2022 | |
|---------|--------|---------|--------|---------|--------|---------|
| | Hotel | Rooms | Hotel | Rooms | Hotel | Rooms |
| 5 stars | 234 | 48,251 | 220 | 45,839 | 244 | 47,859 |
| 4 stars | 776 | 113,723 | 762 | 112,854 | 752 | 112,494 |
| 3 stars | 1,442 | 125,870 | 1,409 | 122,186 | 1,443 | 125,620 |
| 2 stars | 808 | 18,622 | 760 | 49,318 | 765 | 48,941 |
| 1 star | 384 | 53,297 | 370 | 14,865 | 559 | 23,919 |
| Other | 27,179 | 503,087 | 24,086 | 373,836 | 25,979 | 430,149 |
| Total | 30,823 | 870,783 | 27,607 | 718,898 | 29,742 | 788,982 |

Source: [BPS- Statistics Indonesia](#)

Table 5. Occupancy Rate of Star Hotels 2019 - 2022

| Year | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|------|------|------|------|------|------|------|------|------|------|------|------|------|
| 2019 | 51.5 | 52.4 | 52.9 | 53.9 | 43.5 | 52.3 | 56.7 | 54.1 | 53.5 | 56.8 | 58.6 | 59.4 |
| 2020 | 49.2 | 49.2 | 32.2 | 12.7 | 14.5 | 19.7 | 28.1 | 32.9 | 32.1 | 37.5 | 40.1 | 40.8 |
| 2021 | 30.4 | 32.4 | 36.1 | 34.6 | 31.8 | 38.6 | 22.4 | 25.1 | 36.7 | 45.6 | 47.8 | 51.6 |
| 2022 | 42.4 | 38.5 | 45.1 | 34.2 | 49.9 | 50.3 | 49.8 | 47.4 | 50.0 | 52.3 | 54.4 | 56.9 |
| 2023 | 44.8 | 47.8 | 46.3 | 41.4 | 49.0 | 53.7 | 54.5 | | | | | |

Source: [BPS - Statistics Indonesia](#)

Table 6. International Visitors Arrivals in Indonesia

| | 2018 | 2019 | 2020 | 2021 | 2022 |
|----------------------|-------------------|-------------------|------------------|------------------|------------------|
| International | 15,810,300 | 16,106,954 | 4,052,923 | 1,557,530 | 5,471,277 |
| Asia Pacific | 12,875,207 | 13,019,345 | 3,411,270 | 1,468,571 | 4,211,944 |
| America | 568,389 | 648,903 | 134,072 | 25,073 | 241,310 |
| Europe | 2,010,911 | 2,075,864 | 441,179 | 55,906 | 911,780 |
| Other | 355,789 | 362,842 | 66,402 | 7,980 | 106,243 |

Source: [BPS - Statistics Indonesia](#)

Restaurant

The Indonesian foodservice market is fragmented, with international chains, such as KFC, McDonald's and Pizza Hut, dominating the market. In 2022, these three leading players accounted for just 3 percent of the market, leaving space for expansion and further consolidation. Most restaurant chains utilize a mix of local and imported products, with cheese, sauces, flavored beverages, and beef items, which are mostly imported. International chains import their ingredients directly through franchisees and buy from local food ingredient importers.

Table 7. Top 10 Foodservice in 2021 - 2022

| No | Restaurant Brand | Category | Number of Outlet | | Sales Value (US\$ million) | |
|----|---|-------------------------------|------------------|-------|----------------------------|-------|
| | | | 2021 | 2022 | 2021 | 2022 |
| 1 | McDonald's (Rekso Group) | Fast food restaurant | 235 | 269 | 303.6 | 409.8 |
| 2 | KFC (Fastfood Indonesia PT, Tbk) | Fast food restaurant | 822 | 831 | 345.8 | 408.2 |
| 3 | Pizza Hut (Sarimelati Kencana PT, Tbk) | Fast food restaurant | 540 | 562 | 238.7 | 247.2 |
| 4 | Starbucks (Sari Coffee Indonesia PT) | Coffee shop | 443 | 443 | 110.5 | 154.9 |
| 5 | Hokben (Eka Bogainti PT) | Fast food restaurant | 183 | 185 | 79.9 | 103.9 |
| 6 | Kopi Kenangan (Bumi Berkah Boga PT) | Coffee shop | 532 | 932 | 58.3 | 93.3 |
| 7 | Restoran Sederhana (Sederhana Citra Mandiri PT) | Indonesian traditional dishes | 147 | 151 | 77.5 | 93.0 |
| 8 | Chatime (Kawan Lama Sejahtera Group) | Milk & tea shop | 389 | 443 | 68.1 | 88.5 |
| 9 | J Co Donuts & Coffee (Johnny Andrean Group) | Bakery and coffee shop | 245 | 254 | 57.36 | 86.4 |
| 10 | Kopi Janji Jiwa (Luna Boga Narayan PT) | Coffee shop | 920 | 1,100 | 61.0 | 71.3 |

Source: [Euromonitor International](#) and company website

Table 8. Sales Value and Outlet Growth of Indonesia's Foodservice by Type, 2020 – 2021

| Foodservice Type | Outlet | | Sales Value (US\$ million) | | Outlet Growth (202/2021) | Value Growth (202/2021) | Annual Growth (2017 – 2022) | |
|------------------------------|---------|---------|----------------------------|----------|--------------------------|-------------------------|-----------------------------|--------|
| | 2021 | 2022 | 2021 | 2022 | | | Outlet | Sales |
| Full-Service Restaurants | 103,261 | 103,110 | 18,334.5 | 23,762.2 | -0.1% | 29.6% | 0.6% | -4.9% |
| Limited-Service Restaurants* | 7,590 | 8,050 | 1,607.5 | 2,102.3 | 6.1% | 30.8% | 6.0% | 3.7% |
| Cafés/Bars | 8,057 | 8,869 | 1,367.1 | 1,849.1 | 10.1% | 35.3% | 12.7% | -4.7% |
| Street Stalls/ Kiosks | 97,495 | 97,916 | 998.6 | 1,253.6 | 0.4% | 25.5% | 0.7% | -0.3% |
| Self-Service Cafeterias** | 523 | 522 | 98.6 | 118.5 | -0.2% | 20.2% | -46.0% | -10.4% |
| Total | 216,926 | 218,467 | 22,406 | 29,086 | 0.7% | 29.8% | 1.2% | -4.2% |

Note: *Fast Food and Delivery

**Self-Service Cafeterias: ready-to-eat food from food and beverage areas in grocery outlets

Source: [Euromonitor International](#)

Catering

Indonesia's catering industry is comprised of four categories: hospitality (i.e., hotel, weddings, and other events), institutional, online, and in-flight catering. Hospitality, institutional and online catering services are highly fragmented. Services offered in these categories range from five-star hotels and large institutional suppliers to individually run boutique catering businesses and low-cost providers. In-flight catering, institutional (mining and petroleum companies), and international standard catering services mostly use imported foods such as beef, fresh and canned fruits, frozen potatoes, fruits, cheese, etc.

After the COVID-19 pandemic, in-flight and industrial catering services have also started to recover. For example, CAS food, one of Indonesia's leading catering services, reported that in 2022, the sales value for inflight meals has increased by more than 100 percent compared to the previous year, and catering for the mining and industrial sectors increased by 35 percent.

Major catering companies in Indonesia include [Pangansari Utama](#), [Aerofood ACS](#), and [Cardig Aero Service Group](#). Those companies provide international and local menu catering services, mostly to airlines, and industrial and remote catering.

Recently, fast-food chains such as KFC and McDonald's have also begun offering catering packages to Indonesian customers. KFC Indonesia reported that catering accounted for around one percent of its total sales revenue in 2022, increasing by more than 100 percent compared to the previous year.

SECTION III. COMPETITION

The U.S. exported \$868 million of consumer-oriented products to Indonesia in 2022, an increase of 11 percent from 2021, making it the fourth largest exporter to Indonesia in that category after the People's Republic of China (PRC), New Zealand, and Australia. U.S. market share for this segment reached 9.4 percent in 2022, a decline of 1 percent from the previous year due to a doubling of dairy exports from New Zealand.

Products from the United States are considered high-quality and consistently available, but strong competition from the PRC for fresh fruits and from Australia and New Zealand for dairy, beef, and fresh fruits. Consolidated shipments with products from several suppliers are highly favored and can be cost effective for Indonesian importers.

Table 9. Competitive Situation U.S. Suppliers Face in the Indonesian Foodservice Market

| Product Category | Major Supply Sources | Strengths of Key Supply Countries | Local Market Situations |
|---|---|--|---|
| Cheese Total imports: \$164 million From USA: \$43.8 million | 1. New Zealand (36%) 2. USA (27%) 3. Australia (12%) | New Zealand and Australia enjoy preferential tariff treatment under the AANZFTA agreement. Both countries also enjoy geographic proximity and lower transportation costs compared to the United States. | Local cheese production is dominated by processed cheeses, while the majority of QSR and premium restaurants use imported cheese such as mozzarella and cheddar. |
| Fresh fruit Total imports: \$1.3 billion From USA: \$64 million | 1. PRC (67%) 2. Thailand (10%) 3. Australia (9%) 4. USA (5%) | The People’s Republic of China (PRC) offers competitive prices for apples, pears, mandarins and grapes, which account for 96% of Chinese fresh fruits exports to Indonesia. | Tropical fresh fruits dominate local production with inconsistent supply and poor quality. |
| Beef & beef products Total imports: \$1.1 billion From USA: \$120 million | 1. Australia (41%) 2. India (30%) 3. USA (11%) | Australia has geographic proximity and competitive pricing advantages. The market opened for boneless meat from India (buffalo meat) in 2016 and Brazil in 2019 as an effort to stabilize beef prices, mostly sold through wet markets and mid-range supermarkets. | Due to constant shortages of domestic supply, the food service sector relies on imports. Increasing numbers of Korean, Japanese BBQ, and steak-house restaurants are driving up sales of imported beef. |
| Seafood products Total imports: \$664 million From USA: \$35 million | 1. PRC (17%) 2. Russia (10%) 3. South Korea (7%) 4. Canada (7%) 3. USA (5%) | PRC supplies mackerels, crabs, and tuna with competitive prices, while cod and crab imports from Russia experienced an increase in demand of more than 100% on HRI sector growth. | Indonesia is one of the largest producers as well as exporters of tuna and shrimp in the world. But imported crab and salmon dominate consumption in premium restaurants. |
| Pork & pork products Total imports: US\$22 million From USA: US\$2 million | 1. Denmark (40%) 2. PRC (26%) 3. Spain (22%) 4. USA (9%) | PRC mostly offers canned pork for retail consumption, while Denmark and Spain offer frozen pork meat with competitive prices compared to the United States. | Local production is available in Bali, but premium restaurants rely on imported pork products. |
| Wine Total imports: US\$12 million From USA: US \$0.9 million | 1. Australia (23%) 2. Italy (21%) 3. France (13%) 4. Chile (8%) 5. USA (7%) | Australian wine is well known for its quality and offers a wide variety of brands in the market. French wine is considered as premium due to its quality and higher average price. Italy rolled out a strong promotional campaign for Italian wine during the COVID-19 pandemic. | Limited local production is centralized in Bali with few brands in the market. The foodservice sector remains the largest distribution channel and relies on imported brands. |

Source: [TDM](#)

SECTION IV. BEST PROSPECTS FOR U.S. CONSUMER-ORIENTED PRODUCT EXPORTS TO INDONESIA

Top 10 Consumer-Oriented Products Imported from the United States

1. Dairy products (milk and cream powder, cheese)
2. Fresh fruit (grapes, apples, oranges)
3. Food preps. & misc. beverages (i.e., food supplement, bread, pastry, mixes and dough, pasta, soup, cereal)
4. Beef & beef products
5. Processed vegetables (French fries)
6. Processed fruit (dried fruits, raisins, dates, cherries, prunes)
7. Tree nuts (almonds, hazelnuts, pistachios, walnuts)
8. Dog & cat food
9. Condiments & sauces (sauces, tomato ketchup, vinegar)
10. Fruit & vegetable juice (orange juice, grapefruit juice, apple juice)

Products Not Present in Significant Quantities, but have Good Sales Potential

1. Wine
2. Almonds
3. Figs (fresh or dried)
4. Beverages: juice/concentrate
5. Dried fruits: blackberries/blueberries
6. Fresh cut flowers
7. Fresh fruits: cherries, avocado, peaches, raspberries/
8. Prepared pork luncheon meat
9. Baby food
10. Breakfast cereals

Products Not Present Because They Face Significant Import Barriers

- Poultry and eggs
- Beef and dairy products from plants not yet approved by the Indonesian government.

SECTION VI. KEY CONTACTS AND FURTHER INFORMATION

FAS – U.S. Embassy Jakarta
Web: www.usdaindoneisa.org
E-mail : AgJakarta@fas.usda.gov
Tel: +62 21 50831162

Food Standard and Registration
The National Agency for Drug and Food Control (BPOM)
Web: www.pom.go.id

Indonesian Food & Beverage Association
Web: www.gapmmi.or.id
Email: gapmi@cbn.net.id

Indonesian Fruit & Vegetables Exporters & Importers Association
Email: info@aseibssindo.org

Association of Indonesian Meat Importers
Email: asp_1984@cbn.net.id

National Meat Processor Association
Email: nampa@napa-ind.com

Dairy and Meat Approval Directorate
General of Livestock and Animal Health Services
www.ditjennak.pertanian.go.id

Animal/Plant Quarantine and Inspection
Indonesian Agricultural Quarantine Agency
www.karantina.pertanian.go.id

Attachments:

No Attachments