



Staple Foods in Indonesia

November 2025

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Staple Foods in Indonesia

EXECUTIVE SUMMARY

Navigating economic headwinds: Key trends in Indonesian staple foods

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Consumers of staple foods navigate ongoing price pressures
Digital-first approach to marketing convenient meal solutions
Innovation emerges as crucial point of differentiation to drive growth
Health trends influence purchasing decisions and product development

WHAT'S NEXT?

Economic recovery and rising urbanisation to drive future growth of staple foods
Demand for functional staple foods to be driven by health trends
Indonesians to be increasingly influence by social media trends

COMPETITIVE LANDSCAPE

Indofood Sukses Makmur Tbk PT retains lead of highly fragmented landscape
Lotte drives dynamic growth through expanding distribution and product innovation

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Established store network ensures dominance of small local grocers
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Convenience, digital reach, and affordability drive Indonesian baked goods

INDUSTRY PERFORMANCE

Baked goods remains resilient amidst economic challenges in Indonesia
Convenience and affordability drive dynamic growth of packaged cakes

WHAT'S NEXT?

Positive outlook driven by rise in urbanisation and disposable incomes
Health and wellness trend to increasingly influence product development
Convenience store expansion to help drive demand with innovative baked goods

COMPETITIVE LANDSCAPE

Nippon Indosari Corp PT maintains leadership of fragmented competitive landscape
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[Breakfast Cereals in Indonesia](#)

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Rising urbanisation and westernisation drive sales of breakfast cereals
Focus on health and wellness supports dynamic growth of muesli and granola

WHAT'S NEXT?

Urbanisation and demand for convenience will drive future growth of breakfast cereals
Health trend and regulations to influence demand and product development
Increasing focus on innovative product development as point of differentiation

COMPETITIVE LANDSCAPE

Nestlé maintains leadership through new launches and marketing initiatives
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Shelf stable beans combines health benefits with economical value

WHAT'S NEXT?

Stronger future growth to be driven by economic recovery and convenience

Versatility and time-saving attributes of processed options increasingly appreciated

Upcoming regulations to present both challenges and opportunities

COMPETITIVE LANDSCAPE

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WHAT'S NEXT?

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Health trends to inform product development and marketing strategies

Product innovation and digital engagement crucial for maintaining consumer interest

COMPETITIVE LANDSCAPE

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Dynamic growth for e-commerce from low sales base

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[Rice, Pasta and Noodles in Indonesia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Price pressures, health trends, and e-commerce shape rice, pasta and noodles in 2025

INDUSTRY PERFORMANCE

Resilient performance despite ongoing price pressures

Noodles benefits from convenience trends

WHAT'S NEXT?

Economic recovery set to drive demand for premium meal solutions

Health awareness to influence future preferences and product development

Cultural trends, influencer campaigns and experiential marketing crucial for driving consumer engagement

COMPETITIVE LANDSCAPE

Indofood maintains convincing leadership of fragmented competitive landscape
Samyang Ramyun's dynamic growth driven by flavour innovation and enhanced visibility

CHANNELS

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