Euromonitor International

The Rise of Chinese Brands in Indonesia

November 2026

Table of Contents

EXECUTIVE SUMMARY

Why read this report?
Key findings

INTRODUCTION

Indonesia’s scale and deepening China ties create a major growth opportunity
Chinese brands are at different growth stages in Indonesia

WHY ARE CHINESE BRANDS FOCUSING ON INDONESIA?

Indonesia’s role in China’s ASEAN strategy extends beyond trade
Chinese companies are investing to secure long-term access to Indonesia
Indonesia combines scale, demographics and long-term growth potential
Short-term uncertainty has not diminished Indonesia’s long-term appeal

INDONESIA CONSUMER PROFILE

Understanding consumer behaviour is key to unlocking Indonesia’s growth opportunity
Introducing four consumer profiles in Indonesia
Value-Focused Essential Buyers
Aspirational Credit Stretchers
Selective Lifestyle Upgraders
Established Premium Spenders
Winning requires matching the right proposition to the right consumer mindset

OPPORTUNITIES IN INDONESIA FOR CHINESE BRANDS

The changing perception of Chinese brands in Indonesia
How have Chinese brands been able to find success in Indonesia?
Chinese brands lead in turning digital engagement into rapid market share gains
Mapping Chinese brands’ winning strategies in Indonesia
Chinese companies are at different stages of market development across categories

CONSUMER APPLIANCES

From Japan to China: The changing landscape of Indonesia’s appliances market
Learning from Gree’s expansion in Indonesia
Unlocking growth beyond traditional appliance categories
Chinese brands are finding growth beyond Sharp’s core consumer base
Moving forward: Capturing the next growth opportunities

BEAUTY AND PERSONAL CARE

What it takes to compete in the Indonesian beauty market today
Chinese brands capture demand through visibility, speed, and local relevance
Local brands remain competitive through community, trust and identity
Moving forward: Chinese origin as a competitive advantage

CONSUMER FOODSERVICE

The democratisation of café culture created opportunities across consumer profiles
Chagee brings premium tea to a segment long dominated by coffee
Tomoro Coffee scales through tech-led efficiency and trend-led demand
Fore shows how local brands are responding through accessible premium positioning
Moving forward: Opportunities are shifting beyond the crowded mass coffee segment

APPAREL AND FOOTWEAR (SPORTSWEAR)

Winning in Indonesia requires a clear positioning, target consumer and price tier
How winning brands build relevance in Indonesia’s sportswear market

Clearer positioning is shaping the latest wave of Chinese entrants
Moving forward: Capturing growth requires more targeted positioning and localisation

CONCLUSION

Winning in Indonesia starts with understanding which consumer to target
Opportunities for growth in Southeast Asia (1)
Opportunities for growth in Southeast Asia (2)
Evolution of Chinese companies in Indonesia
Packaged food is shaping up as the next growth frontier for Chinese brands
How should Chinese companies entering Indonesia respond to these challenges?
How should established companies in Indonesia respond to these challenges?

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/the-rise-of-chinese-brands-in-indonesia/report.