



Home and Garden Specialist Retailers in Indonesia

February 2022

Table of Contents

KEY DATA FINDINGS

2021 DEVELOPMENTS

Declining purchasing power affects home and garden specialist retailers
Remote working boosts sales through home improvement and garden stores
Leading player continues to attract consumers

PROSPECTS AND OPPORTUNITIES

High value sales from middle to high income expected to boost recovery
IKEA expected to expand store network
Intensified challenges coming from e-commerce

CHANNEL DATA

Table 1 - Home and Garden Specialist Retailers: Value Sales, Outlets and Selling Space 2016-2021
Table 2 - Home and Garden Specialist Retailers: Value Sales, Outlets and Selling Space: % Growth 2016-2021
Table 3 - Sales in Home and Garden Specialist Retailers by Channel: Value 2016-2021
Table 4 - Sales in Home and Garden Specialist Retailers by Channel: % Value Growth 2016-2021
Table 5 - Home and Garden Specialist Retailers GBO Company Shares: % Value 2017-2021
Table 6 - Home and Garden Specialist Retailers GBN Brand Shares: % Value 2018-2021
Table 7 - Home and Garden Specialist Retailers LBN Brand Shares: Outlets 2018-2021
Table 8 - Home and Garden Specialist Retailers LBN Brand Shares: Selling Space 2018-2021
Table 9 - Home and Garden Specialist Retailers Forecasts: Value Sales, Outlets and Selling Space 2021-2026
Table 10 - Home and Garden Specialist Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2021-2026
Table 11 - Forecast Sales in Home and Garden Specialist Retailers by Channel: Value 2021-2026
Table 12 - Forecast Sales in Home and Garden Specialist Retailers by Channel: % Value Growth 2021-2026

Retailing in Indonesia - Industry Overview

EXECUTIVE SUMMARY

Retailing in 2021: The big picture
Changes in opening hours of shopping centres affect grocery retailers in particular
Continued shift to online platforms
What next for retailing?

OPERATING ENVIRONMENT

Informal retailing
Opening hours
Summary 1 - Standard Opening Hours by Channel Type 2021
Physical retail landscape
Cash and carry
Seasonality
Eid al-Fitr/Lebaran
School holidays
Harbolnas (national online shopping day)
Christmas
Payments
Delivery and collection
Emerging business models

MARKET DATA

Table 13 - Sales in Retailing by Store-based vs Non-Store: Value 2016-2021
Table 14 - Sales in Retailing by Store-based vs Non-Store: % Value Growth 2016-2021

Table 15 - Sales in Store-based Retailing by Channel: Value 2016-2021

Table 16 - Sales in Store-based Retailing by Channel: % Value Growth 2016-2021

Table 17 - Store-based Retailing Outlets by Channel: Units 2016-2021

Table 18 - Store-based Retailing Outlets by Channel: % Unit Growth 2016-2021

Table 19 - Sales in Non-Store Retailing by Channel: Value 2016-2021

Table 20 - Sales in Non-Store Retailing by Channel: % Value Growth 2016-2021

Table 21 - Grocery Retailers: Value Sales, Outlets and Selling Space 2016-2021

Table 22 - Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2016-2021

Table 23 - Sales in Grocery Retailers by Channel: Value 2016-2021

Table 24 - Sales in Grocery Retailers by Channel: % Value Growth 2016-2021

Table 25 - Grocery Retailers Outlets by Channel: Units 2016-2021

Table 26 - Grocery Retailers Outlets by Channel: % Unit Growth 2016-2021

Table 27 - Non-Grocery Specialists: Value Sales, Outlets and Selling Space 2016-2021

Table 28 - Non-Grocery Specialists: Value Sales, Outlets and Selling Space: % Growth 2016-2021

Table 29 - Sales in Non-Grocery Specialists by Channel: Value 2016-2021

Table 30 - Sales in Non-Grocery Specialists by Channel: % Value Growth 2016-2021

Table 31 - Non-Grocery Specialists Outlets by Channel: Units 2016-2021

Table 32 - Non-Grocery Specialists Outlets by Channel: % Unit Growth 2016-2021

Table 33 - Mixed Retailers: Value Sales, Outlets and Selling Space 2016-2021

Table 34 - Mixed Retailers: Value Sales, Outlets and Selling Space: % Growth 2016-2021

Table 35 - Sales in Mixed Retailers by Channel: Value 2016-2021

Table 36 - Sales in Mixed Retailers by Channel: % Value Growth 2016-2021

Table 37 - Mixed Retailers Outlets by Channel: Units 2016-2021

Table 38 - Mixed Retailers Outlets by Channel: % Unit Growth 2016-2021

Table 39 - Retailing GBO Company Shares: % Value 2017-2021

Table 40 - Retailing GBN Brand Shares: % Value 2018-2021

Table 41 - Store-based Retailing GBO Company Shares: % Value 2017-2021

Table 42 - Store-based Retailing GBN Brand Shares: % Value 2018-2021

Table 43 - Store-based Retailing LBN Brand Shares: Outlets 2018-2021

Table 44 - Non-Store Retailing GBO Company Shares: % Value 2017-2021

Table 45 - Non-Store Retailing GBN Brand Shares: % Value 2018-2021

Table 46 - Grocery Retailers GBO Company Shares: % Value 2017-2021

Table 47 - Grocery Retailers GBN Brand Shares: % Value 2018-2021

Table 48 - Grocery Retailers LBN Brand Shares: Outlets 2018-2021

Table 49 - Grocery Retailers LBN Brand Shares: Selling Space 2018-2021

Table 50 - Non-Grocery Specialists GBO Company Shares: % Value 2017-2021

Table 51 - Non-Grocery Specialists GBN Brand Shares: % Value 2018-2021

Table 52 - Non-Grocery Specialists LBN Brand Shares: Outlets 2018-2021

Table 53 - Non-Grocery Specialists LBN Brand Shares: Selling Space 2018-2021

Table 54 - Mixed Retailers GBO Company Shares: % Value 2017-2021

Table 55 - Mixed Retailers GBN Brand Shares: % Value 2018-2021

Table 56 - Mixed Retailers LBN Brand Shares: Outlets 2018-2021

Table 57 - Mixed Retailers LBN Brand Shares: Selling Space 2018-2021

Table 58 - Forecast Sales in Retailing by Store-based vs Non-Store: Value 2021-2026

Table 59 - Forecast Sales in Retailing by Store-based vs Non-Store: % Value Growth 2021-2026

Table 60 - Forecast Sales in Store-based Retailing by Channel: Value 2021-2026

Table 61 - Forecast Sales in Store-based Retailing by Channel: % Value Growth 2021-2026

Table 62 - Forecast Store-based Retailing Outlets by Channel: Units 2021-2026

Table 63 - Forecast Store-Based Retailing Outlets by Channel: % Unit Growth 2021-2026

Table 64 - Forecast Sales in Non-Store Retailing by Channel: Value 2021-2026

Table 65 - Forecast Sales in Non-Store Retailing by Channel: % Value Growth 2021-2026

Table 66 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2021-2026

Table 67 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2021-2026

Table 68 - Forecast Sales in Grocery Retailers by Channel: Value 2021-2026

Table 69 - Forecast Sales in Grocery Retailers by Channel: % Value Growth 2021-2026

Table 70 - Forecast Grocery Retailers Outlets by Channel: Units 2021-2026

Table 71 - Forecast Grocery Retailers Outlets by Channel: % Unit Growth 2021-2026

Table 72 - Non-Grocery Specialists Forecasts: Value Sales, Outlets and Selling Space 2021-2026

Table 73 - Non-Grocery Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2021-2026

Table 74 - Forecast Sales in Non-Grocery Specialists by Channel: Value 2021-2026

Table 75 - Forecast Sales in Non-Grocery Specialists by Channel: % Value Growth 2021-2026

Table 76 - Forecast Non-Grocery Specialists Outlets by Channel: Units 2021-2026

Table 77 - Forecast Non-Grocery Specialists Outlets by Channel: % Unit Growth 2021-2026

Table 78 - Mixed Retailers Forecasts: Value Sales, Outlets and Selling Space 2021-2026

Table 79 - Mixed Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2021-2026

Table 80 - Forecast Sales in Mixed Retailers by Channel: Value 2021-2026

Table 81 - Forecast Sales in Mixed Retailers by Channel: % Value Growth 2021-2026

Table 82 - Forecast Mixed Retailers Outlets by Channel: Units 2021-2026

Table 83 - Forecast Mixed Retailers Outlets by Channel: % Unit Growth 2021-2026

DISCLAIMER

SOURCES

Summary 2 - Research Sources

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/home-and-garden-specialist-retailers-in-indonesia/report.