The Future of Retailing in Indonesia to 2019
Comprehensive data overview of the market, with retail sales value and forecasts to 2019

Report Code: RT0021DB
Published: July 2015

Report Price: US$4,950 (Single Copy)
Summary

"The Future of Retailing in Indonesia to 2019" is based upon an extensive, cross-country, industry research program which brings together Conlumino’s research, modeling, and analysis expertise in order to develop uniquely detailed market data. It provides detailed quantitative analysis of past and future trends - crucially providing retail sales data not just by channel and by product, but showing product sales through different channels. This allows marketers interested in retailing to determine how to account for the development of retail trade overall and to know which channels are showing growth for which products in the coming years.

Data sets are provided for 2009 through to 2019, with actuals being provided from 2009–2014. All initial market sizing and analysis is conducted in local currency in order to ensure local trends are reflected in the data before conversion into other currencies.

Key Findings

- General retailers hold the largest share of retail sales in 2014, and will continue to dominate the market in 2019.
- Online channel is set to grow the fastest in the forecast period, 2014–2019, followed by department stores
- Sports and leisure equipment is expected to grow the fastest over the next five years

Reasons to Buy

Get immediate access to:

- Data coverage of 26 products across 9 product groups in the Indonesia’s retail market – accurate, reliable data for companies already operating in and those wishing to enter the Indonesian market
- Performance of individual product categories, across key channels from 2009, with forecasts until 2019 – pinpoint the fastest growing categories in a market witnessing robust growth
- Both qualitative and quantitative insights of the changing retail dynamics across various product segments across different channels
1. **Indonesia Retail Sales Overview**

This section of the report provides an insight into Indonesian retail sales at both category and channel level. It considers nine category groups and four channel groups.

For category groups, data is presented in three ways: at overview level, by breaking down each category group by the channel groups they are sold through, and by breaking down each category group by the product categories it constitutes.

For channel groups too, data is presented in three ways: at overview level, by breaking down each channel group by the channels that it is made of, and by breaking down each channel by the category groups that are sold through it.

1.1 **Retail Categories Overview**

In 2014, food and grocery was the largest category group accounting for XX% of total Indonesian retail sales, which represented a value of IDR XX billion. Sports and leisure equipment was the fastest-growing category group during the review period, registering a CAGR of XX% and is expected to remain so during the forecast period with a CAGR of XX%.
Figure 2: Indonesia Overall Retail Market Dynamics, by Category, 2009–2019

Table 4: Indonesia Overall Retail Sales (US$ bn), by Category Group, 2014–2019

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Source: Conlumino © Conlumino
2. Category Group Analysis: Apparel, Accessories, Luggage and Leather Goods

This chapter considers the Indonesian apparel, accessories, luggage and leather goods category group. Data is presented by breaking down the group by the categories it is made of, and the channels the category group is sold through.

2.1 Apparel, Accessories, Luggage and Leather Goods Category Overview

2.1.1 Apparel, Accessories, Luggage and Leather Goods by Channel

The apparel, accessories, luggage and leather goods product category, contributed XX% towards total retail sales, in 2014, registering retail sales of IDRXX billion. The category group is expected to grow at a pace of XX% during the forecast period, and register retail sales of IDRXX billion in 2019. Specialist retailers formed the dominant sales channel, with retail revenues of IDRXX billion selling XX% of the product category in 2014.

Figure 1: Indonesia Apparel, Accessories, Luggage and Leather Goods Retail Sales and Forecast (IDR mn), by Channel Group, 2009–2019
3. Channel Group Analysis: General Retailers

This chapter considers the Indonesian general retailers channel group. Data is presented by breaking down the group by the channels it is made of, and the category groups that are sold through the channel.

3.1 General Retailers Overview

3.1.1 General Retailers by Channel

General retailers registered sales revenues of IDR XX billion in 2014, with a contribution of XX% towards total retail sales. During the review period, the channel grew at a CAGR of XX% and is expected to record a CAGR of XX% during the forecast period.

Convenience Stores (including Independents) and Gas Stations was the largest channel contributing XX% towards the channel group revenues in 2014, with sales of IDR XX billion, which is expected to reach IDR XX billion by 2019. Hypermarkets, supermarkets and hard-discounters followed with a share of XX% or IDR XX billion in 2014, which is projected to reach IDR XX billion during the forecast period.

Figure 2: Indonesia General Retailers Sales and Forecast (IDR mn), by Channel, 2009–2019

Source: Conlumino
Figure 3: Indonesia General Retailers Market Dynamics, by Channel, 2009–2019

![Graph showing market dynamics by channel.]

Source: Conlumino

Table 256: Indonesia General Retailers Sales (IDR mn), by Channel, 2014–2019

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CAGR (2014–2019)

Source: Conlumino
Summary Methodology

Overview

All data in this series of retail reports from Conlumino is rigorously sourced using a comprehensive, standardized methodology. This methodology ensures that all data is thoroughly researched and cross-checked against a number of sources and validation processes. At the core of this methodology is a triangulated market sizing approach, which ensures that results from different sources and approaches, including Conlumino’s own industry surveys, are compared and a final consensus number between these inputs is derived. In addition, standardized processes and quality controls across the entire data collection, analysis and publication process ensure compliance and cross-checking of the data occurs at each stage of the methodology.

The triangulated market sizing method

The triangulation method ensures that the results from three distinct phases of the research are brought together and cross-compared before finalized market numbers are derived:

1. **Existing internal resources**: as retail data is compiled using a rolling annual program of industry research, the first stage of producing the data is to review the existing internal information, both from the last major data release, as well as that which has been collected on an ongoing basis throughout the year. This includes inputs about market as well as individual retailer performance. These sources are then reviewed and incorporated into data collection processes and databases before the second intensive phase of desk research.

2. **Extensive desk research**: this phase of the methodology incorporates the main phase of secondary research. This research is initially conducted across a wealth of information sources, as listed below. In addition, the results of any relevant surveys from other Conlumino projects are also fed into data collection sheets. Online industry surveys can include industry opinion surveys of retailers’ — and their suppliers’ — sentiment and consumer surveys of purchasing and retail behavior. Secondary sources include, but are not limited to, the following:
   - Industry surveys
   - Industry and trade association research
   - Trade portals
   - Company filings and analyst presentations
   - Broker and investment analyst reports
   - International organizations
   - Government statistics
   - Retail media
   - National Press, including both business and consumer titles

3. **Market modeling**: the next stage in the process is to feed the results of the above into market models, which also include drive-based forecasting tools — which analyze drivers such as disposable income, product uptake, macro-economic drivers and market momentum — in order to fill in any gaps in the data and update forecast numbers. At this stage, the market models also look to update channel distribution data sets. For example, information
found at the research and trend monitoring stage on online retail sales would directly affect the channel distribution models.

4. **Data finalization**: the final stage of the process is the true triangulation of all the previous inputs. At this stage data is created using the inputs to hand in a bottom–up fashion, starting with the inputs from each of the previous three stages of the process for each data point to be published. This is done for all the product, channel and country combinations covered in the data. At this stage, therefore, the project analysts are constantly evaluating and deciding upon the relative merits of each of the inputs from the research processes. Once a triangulated set of data has been finalized, these outputs are then thoroughly cross–checked using a series of top–down checks which review the data against a series of reference benchmarking, including known overall retail sizes, growth trends and per–capita spending rates.

![Figure 6: The Triangulated Market Sizing Methodology](source: Conlumino)
Industry surveys in the creation of retail market data

Stage 2 of the above process includes using the outputs of Conlumino’s surveys of consumers’ packaged goods consumption and industry opinion. Every year Conlumino completes a large scale survey, with over 120,000 responses, covering CPG purchasing and consumption habits in 10 core retail markets around the globe. This major study, cross-referenced against the primary telephone research of product market sizes by country, provides outputs against which relevant retail market data, focusing on the grocery channel and core products in this channel are assessed. It should be noted that overall, this feeds research into 3 of the 25 product categories covered. In addition, any other suitable surveys conducted by Conlumino which also provide information on retail markets are mined for information to be put into the data finalization process.

Quality control and standardized processes

Crucial to the function of the above method is the adoption of strict definitions for all products and channels, and adherence to a standardized process at each and every stage in the methodology. By following this approach all data is made cross-comparable across countries to ensure that analysis adds to the understanding of market dynamics and trends.

The key elements of this approach are:

- **Strict channel definitions**: the definition of each channel is the same in every country;
- **Strict product definitions**: the definition of each product is the same in every country;
- **Standardized processes**:
  - **Data capture** – all data received as part of the research is captured in standardized files and in a standard format. Any workings that analysts carry out on inputs, for example to correct for misalignment in category coverage, are also covered in these sheets
  - **Data creation** – all modeling and forecasting approaches are standardized in order to ensure consistency
  - **Finalization and verification** – systematic methods and approaches are used to finalize data points
- **Country by country research structure**: all research is conducted country by country in order to ensure that market data reflect local market trends and contexts
- **Data checks during “bottom-up” creation**: during the data creation and finalization stage analysts refer back to initial sources and inputs in order to ensure accuracy in the data
- **Top down data audits and cross-checks**: a large series of cross-checks across all the different dimensions of the final data sets are run in order to identify any outliers or trends that do not fit with Conlumino’s market understanding, as well as to conduct specific analyses against set proofing criteria, such as abnormal growth rate changes, verifying data at both the overall and detailed level against research inputs and checking per capita spends against other analysis of consumers’ spending in a country
- **Hierarchical review processes**: finally, all of the above processes are subject to a hierarchical review process which ensures that not only the core analysts within a team look at the data, but that at each stage data is passed through several management layers in order that queries and data review and sign-off are completed before any final data can be published
# Table of Contents

1. Introduction .................................................................................................................. 16  
   1.1 What is this Report About? .................................................................................. 16  

2. Indonesia Retail Sales Overview ............................................................................... 17  
   2.1 Retail Categories Overview .............................................................................. 17  
   2.2 Retail Channels Overview .................................................................................. 24  

   3.1 Apparel, Accessories, Luggage and Leather Goods Category Overview .......... 28  
   3.1.1 Apparel, Accessories, Luggage and Leather Goods by Channel .................. 28  
   3.1.2 Apparel, Accessories, Luggage and Leather Goods by Category ............... 32  
   3.2 Apparel, Accessories, Luggage and Leather Goods Category Analysis .......... 36  
   3.2.1 Clothing ........................................................................................................ 36  
   3.2.2 Footwear ...................................................................................................... 42  
   3.2.3 Jewelry, Watches and Accessories ............................................................... 48  
   3.2.4 Luggage and Leather Goods ....................................................................... 51  

   4.1 Books, News and Stationery Category Overview ............................................. 54  
   4.1.1 Books, News and Stationery by Channel ..................................................... 54  
   4.1.2 Books, News and Stationery by Category ................................................... 58  
   4.2 Books, News and Stationery Category Analysis ............................................. 62  
   4.2.1 Printed Media .............................................................................................. 62  
   4.2.2 Stationery and Cards ............................................................................... 65  

5. Category Group Analysis: Electrical and Electronics ............................................ 68  
   5.1 Electrical and Electronics Category Overview ................................................. 68  
   5.1.1 Electrical and Electronics by Channel ......................................................... 68  
   5.1.2 Electrical and Electronics by Category ......................................................... 72  
   5.2 Electrical and Electronics Category Analysis ................................................. 76  
   5.2.1 Communications Equipment ..................................................................... 76  
   5.2.2 Computer Hardware and Software ............................................................ 79  
   5.2.3 Consumer Electronics ............................................................................... 82  
   5.2.4 Household Appliances .............................................................................. 85  
   5.2.5 Photographic Equipment ............................................................................ 88
## 6. Category Group Analysis: Food and Grocery ........................................... 91

### 6.1 Food and Grocery Category Overview ........................................... 91

### 6.1.1 Food and Grocery by Channel .................................................. 91

### 6.1.2 Food and Grocery by Category .................................................. 95

### 6.2 Food and Grocery Category Analysis ........................................... 99

#### 6.2.1 Drinks .................................................................................... 99

#### 6.2.2 Household Products ............................................................... 105

#### 6.2.3 Packaged Food ....................................................................... 108

#### 6.2.4 Tobacco .................................................................................. 111

#### 6.2.5 Unpackaged Food ................................................................. 114

## 7. Category Group Analysis: Furniture and Floor Coverings .................. 114

### 7.1 Furniture and Floor Coverings Category Overview .......................... 114

### 7.1.1 Furniture and Floor Coverings by Channel .................................. 114

### 7.1.2 Furniture and Floor Coverings by Category ................................ 115

### 7.2 Furniture and Floor Coverings Category Analysis ............................ 122

#### 7.2.1 Floor Coverings ...................................................................... 122

#### 7.2.2 Furniture ................................................................................. 125

## 8. Category Group Analysis: Health & Beauty ........................................ 128

### 8.1 Health & Beauty Category Overview ............................................. 128

### 8.1.1 Health & Beauty by Channel ..................................................... 128

### 8.1.2 Health & Beauty by Category ................................................... 132

## 9. Category Group Analysis: Home and Garden Products ...................... 134

### 9.1 Home and Garden Products Category Overview ............................. 134

### 9.1.1 Home and Garden Products by Channel ..................................... 134

### 9.1.2 Home and Garden Products by Category .................................... 138

### 9.2 Home and Garden Products Category Analysis ............................. 142

#### 9.2.1 Gardening and Outdoor Living ............................................... 142

#### 9.2.2 Home Improvement ................................................................. 145

#### 9.2.3 Homewares ............................................................................. 148

## 10. Category Group Analysis: Music, Video and Entertainment Software ..... 151

### 10.1 Music, Video and Entertainment Software Category Overview .......... 151

### 10.1.1 Music, Video and Entertainment Software by Channel .................. 151

### 10.1.2 Music, Video and Entertainment Software by Category ................ 155
### 10.2 Music, Video and Entertainment Software Category Analysis ................................. 159
10.2.1 Games Software ..................................................................................................... 159
10.2.2 Music and Video ................................................................................................... 162

### 11. Category Group Analysis: Sports and Leisure Equipment ................................. 165
11.1 Sports and Leisure Equipment Category Overview .................................................. 165
11.1.1 Sports and Leisure Equipment by Channel .......................................................... 165
11.1.2 Sports and Leisure Equipment by Category ......................................................... 169
11.2 Sports and Leisure Equipment Category Analysis .................................................... 173
11.2.1 Sports Equipment ............................................................................................... 173
11.2.2 Toys and Games ................................................................................................. 176

### 12. Channel Group Analysis: Value Retailers ............................................................. 179
12.1 Value Retailers Overview ......................................................................................... 179
12.1.1 Value Retailers by Channel ................................................................................ 179
12.1.2 Value Retailers by Category .............................................................................. 183
12.2 Value Retailers Channel Analysis ............................................................................ 190
12.2.1 Cash and Carries and Warehouse Club Stores .................................................... 190
12.2.2 Value, Variety Stores and General Merchandise Retailers .................................. 196

### 13. Channel Group Analysis: General Retailers ......................................................... 202
13.1 General Retailers Overview ..................................................................................... 202
13.1.1 General Retailers by Channel ............................................................................. 202
13.1.2 General Retailers by Category ......................................................................... 206
13.2 General Retailers Channel Analysis ....................................................................... 213
13.2.1 Convenience Stores (Including Independents) and Gas Stations ....................... 213
13.2.2 Department Stores ............................................................................................. 219
13.2.3 Hypermarkets, Supermarkets and Hard-Discounters ........................................ 225
13.2.4 Vending Machines ............................................................................................ 231
13.2.5 Other General and Non-Specialist Direct Retailers .......................................... 237

### 14. Channel Group Analysis: Specialist Retailers ....................................................... 243
14.1 Specialist Retailers Overview ................................................................................. 243
14.1.1 Specialist Retailers by Channel ......................................................................... 243
14.1.2 Specialist Retailers by Category ....................................................................... 250
14.2 Specialist Retailers Channel Analysis ..................................................................... 257
14.2.1 Clothing, Footwear, Accessories and Luxury Goods Specialists ...................... 257
14.2.2 Drug Stores and Health and Beauty Stores ......................................................... 263
14.2.3 Duty Free Retailers .......................................................... 269
14.2.4 Electrical and Electronics Specialists ........................................ 275
14.2.5 Food and Drinks Specialists .................................................. 281
14.2.6 Home Furniture and Homewares Retailers .................................. 287
14.2.7 Home Improvement and Gardening Supplies Retailers ..................... 293
14.2.8 Music, Video, Book, Stationery and Entertainment Software Specialists ....................................................... 299
14.2.9 Other Specialist Retailers ........................................................ 305

15. Channel Group Analysis: Online Retailing ..................................... 311
15.1 Online Retailing Overview .......................................................... 311
15.1.1 Online Retailing by Category .................................................... 311

16. Appendix ................................................................................. 318
16.1 Definitions .............................................................................. 318
16.1.1 This report provides 2014 actual sales; while forecasts are provided for 2014 – 2019 .................................................. 318
16.2 Summary Methodology ............................................................... 325
16.2.1 Overview ............................................................................. 325
16.2.2 The triangulated market sizing method ....................................... 325
16.2.3 Industry surveys in the creation of retail market data ......................... 327
16.2.4 Quality control and standardized processes ..................................... 327
16.3 About Conlumino .................................................................... 328
16.4 Disclaimer .............................................................................. 328
List of Figures

Figure 1: Indonesia Overall Retail Sales and Forecast (IND bn), by Category Group, 2009–2019................................. 16
Figure 2: Indonesia Overall Retail Market Dynamics, by Category, 2009–2019......................................................... 17
Figure 3: Indonesia Overall Retail Sales and Forecast (IND bn), by Channel Group, 2009–2019................................. 23
Figure 4: Indonesia Overall Retail Market Dynamics, by Channel, 2009–2019...................................................... 24
Figure 5: Indonesia Apparel, Accessories, Luggage and Leather Goods Retail Sales and Forecast (IND bn), by Channel Group, 2009–2019.......................................................... 27
Figure 6: Indonesia Apparel, Accessories, Luggage and Leather Goods Retail Market Dynamics, by Channel Group, 2009–2019.......................................................... 28
Figure 7: Indonesia Apparel, Accessories, Luggage and Leather Goods Retail Sales and Forecast (IND bn), by Category 2009–2019.......................................................... 31
Figure 8: Indonesia Apparel, Accessories, Luggage and Leather Goods Retail Market Dynamics, by Category 2009–2019 32
Figure 9: Indonesia Clothing Retail Sales and Forecast (IND bn), by Channel Group, 2009–2019................................. 35
Figure 10: Indonesia Clothing Retail Sales and Forecast (IND bn), by Sub-Category, 2009–2019................................. 38
Figure 11: Indonesia Footwear Retail Sales and Forecast (IND bn), by Channel Group, 2009–2019................................. 41
Figure 12: Indonesia Footwear Retail Sales and Forecast (IND bn), by Sub-Category, 2009–2019................................. 44
Figure 13: Indonesia Jewelry, Watches and Accessories Retail Sales and Forecast (IND bn), by Channel Group, 2009–2019.......................................................... 47
Figure 14: Indonesia Luggage and Leather Goods Retail Sales and Forecast (IND bn), by Channel Group, 2009–201950
Figure 15: Indonesia Books, News and Stationery Retail Sales and Forecast (IND bn), by Channel Group, 2009–201953
Figure 16: Indonesia Books, News and Stationery Retail Market Dynamics, by Channel Group, 2009–2019......... 54
Figure 17: Indonesia Books, News and Stationery Retail Sales and Forecast (IND bn), by Category 2009–2019 ........ 57
Figure 18: Indonesia Books, News and Stationery Retail Market Dynamics, by Category 2009–2019 ................... 58
Figure 19: Indonesia Printed Media Retail Sales and Forecast (IND bn), by Channel Group, 2009–2019............... 61
Figure 20: Indonesia Stationery and Cards Retail Sales and Forecast (IND bn), by Channel Group, 2009–2019 .... 64
Figure 21: Indonesia Electrical and Electronics Retail Sales and Forecast (IND bn), by Channel Group, 2009–2019 67
Figure 22: Indonesia Electrical and Electronics Retail Market Dynamics, by Channel Group, 2009–2019 ........ 68
Figure 23: Indonesia Electrical and Electronics Retail Sales and Forecast (IND bn), by Category 2009–2019 .... 71
Figure 24: Indonesia Electrical and Electronics Retail Market Dynamics, by Category 2009–2019 .................... 72
Figure 25: Indonesia Communications Equipment Retail Sales and Forecast (IND bn), by Channel Group, 2009–201975
Figure 26: Indonesia Computer Hardware and Software Retail Sales and Forecast (IND bn), by Channel Group, 2009–201978
Figure 27: Indonesia Consumer Electronics Retail Sales and Forecast (IND bn), by Channel Group, 2009–2019 .... 81
Figure 28: Indonesia Household Appliances Retail Sales and Forecast (IND bn), by Channel Group, 2009–2019 .... 84
Figure 29: Indonesia Photographic Equipment Retail Sales and Forecast (IND bn), by Channel Group, 2009–2019 .... 87
Figure 30: Indonesia Food and Grocery Retail Sales and Forecast (IND bn), by Channel Group, 2009–2019 .... 90
Figure 31: Indonesia Food and Grocery Retail Market Dynamics, by Channel Group, 2009–2019 ...................... 91
Figure 32: Indonesia Food and Grocery Retail Sales and Forecast (IND bn), by Category 2009–2019 .................... 94
Figure 33: Indonesia Food and Grocery Retail Market Dynamics, by Category 2009–2019...................... 95
Figure 34: Indonesia Drinks Retail Sales and Forecast (IND bn), by Channel Group, 2009–2019 .................... 98
Figure 35: Indonesia Household Products Retail Sales and Forecast (IND bn), by Channel Group, 2009–2019 .... 101
Figure 36: Indonesia Packaged Food Retail Sales and Forecast (IND bn), by Channel Group, 2009–2019 .... 103
Figure 37: Indonesia Tobacco Retail Sales and Forecast (IND bn), by Channel Group, 2009–2019 .................... 107
Figure 38: Indonesia Unpackaged Food Retail Sales and Forecast (IND bn), by Channel Group, 2009–2019 ...... 110
Figure 39: Indonesia Furniture and Floor Coverings Retail Sales and Forecast (IND bn), by Channel Group, 2009–2019113
Figure 40: Indonesia Furniture and Floor Coverings Retail Market Dynamics, by Channel Group, 2009–2019 .... 114
Figure 41: Indonesia Furniture and Floor Coverings Retail Sales and Forecast (IND bn), by Category Group, 2009–2019117
Figure 42: Indonesia Furniture and Floor Coverings Retail Market Dynamics, by Category Group, 2009–2019 .... 118
Figure 43: Indonesia Floor Coverings Retail Sales and Forecast (IND bn), by Channel Group, 2009–2019 .... 121
Figure 44: Indonesia Furniture Retail Sales and Forecast (IND bn), by Channel Group, 2009–2019 .... 124
Figure 45: Indonesia Health & Beauty Retail Sales and Forecast (IND bn), by Channel Group, 2009–2019 .... 127
Figure 46: Indonesia Health & Beauty Retail Market Dynamics, by Channel Group, 2009–2019 .................... 128
Figure 47: Indonesia Health & Beauty Retail Sales and Forecast (IND bn), by Category Group, 2009–2019 .... 131
Figure 48: Indonesia Home and Garden Products Retail Sales and Forecast (IND bn), by Channel Group, 2009–2019133
Figure 49: Indonesia Home and Garden Products Retail Market Dynamics, by Channel Group, 2009–2019 ............. 134
Figure 50: Indonesia Home and Garden Products Retail Sales and Forecast, by Channel Group, 2009–2019 .......... 137
Figure 51: Indonesia Home and Garden Products Retail Market Dynamics, by Category Group 2009–2019 .......... 138
Figure 52: Indonesia Gardening and Outdoor Living Retail Sales and Forecast (IND bn), by Channel Group, 2009–2019141
Figure 53: Indonesia Home Improvement Retail Sales and Forecast (IND bn), by Channel Group, 2009–2019 ....... 144
Figure 54: Indonesia Homewares Retailers Sales and Forecast (IND bn), by Channel Group, 2009–2019 ............ 147
Figure 55: Indonesia Music, Video and Entertainment Software Retail Sales and Forecast (IND bn), by Channel Group, 2009–2019 .................................................. 150
Figure 56: Indonesia Music, Video and Entertainment Software Retail Market Dynamics, by Channel Group, 2009–2019151
Figure 57: Indonesia Music, Video and Entertainment Software Retail Sales and Forecast (IND bn), by Category Group, 2009–2019 .......................................................... 154
Figure 58: Indonesia Music, Video and Entertainment Software Retail Market Dynamics, by Category Group, 2009–2019 ... 155
Figure 59: Indonesia Games Software Retail Sales and Forecast (IND bn), by Channel Group, 2009–2019 .......... 158
Figure 60: Indonesia Music and Video Retail Sales and Forecast (IND bn), by Channel Group, 2009–2019 .......... 161
Figure 61: Indonesia Sports and Leisure Equipment Retail Sales and Forecast (IND bn), by Channel Group, 2009–2019164
Figure 62: Indonesia Sports and Leisure Equipment Retail Market Dynamics, by Channel Group, 2009–2019 .... 165
Figure 63: Indonesia Sports and Leisure Equipment Retail Sales and Forecast (IND bn), by Channel Group, 2009–2019 .... 168
Figure 64: Indonesia Sports and Leisure Equipment Retail Market Dynamics, by Category Group, 2009–2019 .... 169
Figure 65: Indonesia Sports Equipment Retail Sales and Forecast (IND bn), by Channel Group, 2009–2019 .......... 172
Figure 66: Indonesia Toys and Games Retail Sales and Forecast (IND bn), by Channel Group, 2009–2019 .......... 175
Figure 67: Indonesia Value Retailers Sales and Forecast (IND bn), by Channel, 2009–2019 ............................. 178
Figure 68: Indonesia Value Retailers Sales and Forecast (IND bn), by Channel, 2009–2019 ............................. 179
Figure 69: Indonesia Value Retailers Sales and Forecast (IND bn), by Category Group, 2009–2019 ................... 182
Figure 70: Indonesia Value Retailers Market Dynamics, by Category Group, 2009–2019 ............................. 183
Figure 71: Indonesia Cash and Carries and Warehouse Clubs Sales and Forecast (IND bn), by Category Group, 2009–2019 .......................................................... 189
Figure 72: Indonesia Value, Variety Stores and General Merchandise Retailers Sales and Forecast (IND bn), by Category Group, 2009–2019 .......................................................... 195
Figure 73: Indonesia General Retailers Sales and Forecast (IND bn), by Channel, 2009–2019 .......................... 201
Figure 74: Indonesia General Retailers Market Dynamics, by Channel, 2009–2019 ................................. 202
Figure 75: Indonesia General Retailers Sales and Forecast (IND bn), by Category Group, 2009–2019 .............. 205
Figure 76: Indonesia General Retailers Market Dynamics, by Category Group, 2009–2019 ............................ 206
Figure 77: Indonesia Convenience Stores (including Independents) and Gas Stations Sales and Forecast (IND bn), by Category Group, 2009–2019 .............................................. 212
Figure 78: Indonesia Department Stores Sales and Forecast (IND bn), by Category Group, 2009–2019 .......... 218
Figure 79: Indonesia Hypermarkets, Supermarkets and Hard-Discounters Sales and Forecast (IND bn), by Category Group, 2009–2019 .................................................. 224
Figure 80: Indonesia Vending Machines Sales and Forecast (IND bn), by Category Group, 2009–2019 .......... 230
Figure 81: Indonesia Other General and Non-Specialist Direct Retailers Sales and Forecast (IND bn), by Category Group, 2009–2019 .................................................. 236
Figure 82: Indonesia Specialist Retailers Sales and Forecast (IND bn), by Channel 2009–2019 ....................... 242
Figure 83: Indonesia Specialist Retailers Market Dynamics, by Channel 2009–2019 ................................. 243
Figure 84: Indonesia Specialist Retailers Sales and Forecast (IND bn), by Category Group, 2009–2019 ........... 249
Figure 85: Indonesia Specialist Retailers Market Dynamics, by Category Group, 2009–2019 ....................... 250
Figure 86: Indonesia Clothing, Footwear, Accessories and Luxury Goods Specialists Sales and Forecast (IND bn), by Category Group, 2009–2019 .............................................. 256
Figure 87: Indonesia Drug Stores and Health and Beauty Stores Sales and Forecast (IND bn), by Category Group, 2009–2019 .......................................................... 262
Figure 88: Indonesia Duty Free Retailers Sales and Forecast (IND bn), by Category Group, 2009–2019 .......... 268
Figure 89: Indonesia Electrical and Electronics Specialists Sales and Forecast (IND bn), by Category Group, 2009–2019 274
Figure 90: Indonesia Food and Drinks Specialists Sales and Forecast (IND bn), by Category Group, 2009–2019 .... 280
Figure 91: Indonesia Home Furniture and Homewares Retailers Sales and Forecast (IND bn), by Category Group, 2009–2019 .......................................................... 286
Figure 92: Indonesia Home Improvement and Gardening Supplies Retailers Sales and Forecast (IND bn), by Category Group, 2009–2019 .................................................. 292
Figure 93: Indonesia Music, Video, Book, Stationery and Entertainment Software Specialists Sales and Forecast (IND bn), by Category Group, 2009–2019

Figure 94: Indonesia Other Specialist Retailers Sales and Forecast (IND bn), by Category Group, 2009–2019

Figure 95: Indonesia Online Retailing Sales and Forecast (IND bn), by Category Group, 2009–2019

Figure 96: Indonesia Online Retailing Market Dynamics, by Category Group, 2009–2019

Figure 97: The Triangulated Market Sizing Methodology
List of Tables

Table 1: Indonesia Overall Retail Sales (IND bn), by Category Group, 2009–2014 .................................................. 19
Table 2: Indonesia Overall Retail Sales Forecast (IND bn), by Category Group, 2014–2019 ......................................... 20
Table 3: Indonesia Overall Retail Sales (US$ mn), by Category Group, 2009–2014 ....................................................... 21
Table 4: Indonesia Overall Retail Sales Forecast (US$ mn), by Category Group, 2014–2019 ....................................... 22
Table 5: Indonesia Overall Retail Segmentation (% value), by Category Group, 2009–2019 ........................................... 23
Table 6: Indonesia Overall Retail Sales (IND bn), by Channel Group, 2009–2014 ......................................................... 25
Table 7: Indonesia Overall Retail Sales Forecast (IND bn), by Channel Group, 2014–2019 ......................................... 26
Table 8: Indonesia Overall Retail Sales (US$ mn), by Channel Group, 2009–2014 ....................................................... 26
Table 9: Indonesia Overall Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019 ....................................... 27
Table 10: Indonesia Overall Retail Segmentation (% value), by Channel Group, 2009–2019 ...................................... 27
Table 11: Indonesia Apparel, Accessories, Luggage and Leather Goods Retail Sales (IND bn), by Channel Group, 2009–2014 .................................................................................................................. 29
Table 12: Indonesia Apparel, Accessories, Luggage and Leather Goods Retail Sales Forecast (IND bn), by Channel Group, 2014–2019 .............................................................................................................. 30
Table 13: Indonesia Apparel, Accessories, Luggage and Leather Goods Retail Sales (US$ mn), by Channel Group, 2009–2014 .................................................................................................................. 30
Table 14: Indonesia Apparel, Accessories, Luggage and Leather Goods Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019 .............................................................................................................. 31
Table 15: Indonesia Apparel, Accessories, Luggage and Leather Goods Retail Segmentation (% value), by Channel Group, 2009–2019 .............................................................................................................. 31
Table 16: Indonesia Apparel, Accessories, Luggage and Leather Goods Retail Sales (IND bn), by Category 2009–2014 .................................................................................................................... 34
Table 17: Indonesia Apparel, Accessories, Luggage and Leather Goods Retail Sales Forecast (IND bn), by Category 2014–2019 .................................................................................................................... 34
Table 18: Indonesia Apparel, Accessories, Luggage and Leather Goods Retail Sales (US$ mn), by Category 2009–2014 .................................................................................................................... 35
Table 19: Indonesia Apparel, Accessories, Luggage and Leather Goods Retail Sales Forecast (US$ mn), by Category, 2014–2019 .................................................................................................................... 35
Table 20: Indonesia Apparel, Accessories, Luggage and Leather Goods Retail Segmentation (% value), by Category, 2009–2019 .................................................................................................................... 35
Table 21: Indonesia Clothing Retail Sales (IND bn), by Channel Group, 2009–2014 .................................................... 37
Table 22: Indonesia Clothing Retail Sales Forecast (IND bn), by Channel Group, 2014–2019 ....................................... 37
Table 23: Indonesia Clothing Retail Sales (US$ mn), by Channel Group, 2009–2014 .................................................... 38
Table 24: Indonesia Clothing Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019 ....................................... 38
Table 25: Indonesia Clothing Retail Segmentation, by Channel Group, 2009–2019 ..................................................... 38
Table 26: Indonesia Clothing Retail Sales (IND bn), by Sub-Category, 2009–2014 ......................................................... 40
Table 27: Indonesia Clothing Retail Sales Forecast (IND bn), by Sub-Category, 2014–2019 ......................................... 40
Table 28: Indonesia Clothing Retail Sales (US$ mn), by Sub-Category, 2009–2014 ...................................................... 41
Table 29: Indonesia Clothing Retail Sales Forecast (US$ mn), by Sub-Category, 2014–2019 ....................................... 41
Table 30: Indonesia Clothing Retail Segmentation, by Sub-Category, 2009–2019 ....................................................... 41
Table 31: Indonesia Footwear Retail Sales (IND bn), by Channel Group, 2009–2014 .................................................... 43
Table 32: Indonesia Footwear Retail Sales Forecast (IND bn), by Channel Group, 2014–2019 ....................................... 43
Table 33: Indonesia Footwear Retail Sales (US$ mn), by Channel Group, 2009–2014 .................................................... 44
Table 34: Indonesia Footwear Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019 ....................................... 44
Table 35: Indonesia Footwear Retail Segmentation, by Channel Group, 2009–2019 ..................................................... 44
Table 36: Indonesia Footwear Retail Sales (IND bn), by Sub-Category, 2009–2014 ......................................................... 46
Table 37: Indonesia Footwear Retail Sales Forecast (IND bn), by Sub-Category, 2014–2019 ......................................... 46
Table 38: Indonesia Footwear Retail Sales (US$ mn), by Sub-Category, 2009–2014 ...................................................... 46
Table 39: Indonesia Footwear Retail Sales Forecast (US$ mn), by Sub-Category, 2014–2019 ....................................... 47
Table 40: Indonesia Footwear Retail Segmentation, by Sub-Category, 2009–2019 ....................................................... 47
Table 41: Indonesia Jewelry, Watches and Accessories Retail Sales (IND bn), by Channel Group, 2009–2014 ............ 48
Table 42: Indonesia Jewelry, Watches and Accessories Retail Sales Forecast (IND bn), by Channel Group, 2014–201949
Table 43: Indonesia Jewelry, Watches and Accessories Retail Sales (US$ mn), by Channel Group, 2009–2014 ............ 49
Table 44: Indonesia Jewelry, Watches and Accessories Retail Sales Forecast (US$ mn), by Channel Group, 2014–201950

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Table 45: Indonesia Jewelry, Watches and Accessories Retail Segmentation, by Channel Group, 2009–2019

Table 46: Indonesia Luggage and Leather Goods Retail Sales (IND bn), by Channel Group, 2009–2014

Table 47: Indonesia Luggage and Leather Goods Retail Sales Forecast (IND bn), by Channel Group, 2014–2019

Table 48: Indonesia Luggage and Leather Goods Retail Sales (US$ mn), by Channel Group, 2009–2014

Table 49: Indonesia Luggage and Leather Goods Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019

Table 50: Indonesia Luggage and Leather Goods Retail Segmentation, by Channel Group, 2009–2019

Table 51: Indonesia Books, News and Stationery Retail Sales (IND bn), by Channel Group, 2009–2014

Table 52: Indonesia Books, News and Stationery Retail Sales Forecast (IND bn), by Channel Group, 2014–2019

Table 53: Indonesia Books, News and Stationery Retail Sales (US$ mn), by Channel Group, 2009–2014

Table 54: Indonesia Books, News and Stationery Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019

Table 55: Indonesia Books, News and Stationery Retail Segmentation (% value), by Channel Group, 2009–2014

Table 56: Indonesia Books, News and Stationery Retail Segmentation (% value), by Channel Group, 2009–2019

Table 57: Indonesia Books, News and Stationery Retail Sales Forecast (IND bn), by Channel Group, 2014–2019

Table 58: Indonesia Books, News and Stationery Retail Sales (US$ mn), by Channel Group, 2009–2014

Table 59: Indonesia Books, News and Stationery Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019

Table 60: Indonesia Books, News and Stationery Retail Segmentation (% value), by Category, 2009–2014

Table 61: Indonesia Printed Media Retail Sales (IND bn), by Channel Group, 2009–2014

Table 62: Indonesia Printed Media Retail Sales Forecast (IND bn), by Channel Group, 2014–2019

Table 63: Indonesia Printed Media Retail Sales (US$ mn), by Channel Group, 2009–2014

Table 64: Indonesia Printed Media Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019

Table 65: Indonesia Printed Media Retail Segmentation, by Channel Group, 2009–2019

Table 66: Indonesia Stationery and Cards Retail Sales (IND bn), by Channel Group, 2009–2014

Table 67: Indonesia Stationery and Cards Retail Sales Forecast (IND bn), by Channel Group, 2014–2019

Table 68: Indonesia Stationery and Cards Retail Sales (US$ mn), by Channel Group, 2009–2014

Table 69: Indonesia Stationery and Cards Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019

Table 70: Indonesia Stationery and Cards Retail Segmentation, by Channel Group, 2009–2019

Table 71: Indonesia Electrical and Electronics Retail Sales (IND bn), by Channel Group, 2009–2014

Table 72: Indonesia Electrical and Electronics Retail Sales Forecast (IND bn), by Channel Group, 2014–2019

Table 73: Indonesia Electrical and Electronics Retail Sales (US$ mn), by Channel Group, 2009–2014

Table 74: Indonesia Electrical and Electronics Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019

Table 75: Indonesia Electrical and Electronics Retail Segmentation (% value), by Channel Group, 2009–2014

Table 76: Indonesia Electrical and Electronics Retail Segmentation (% value), by Channel Group, 2009–2019

Table 77: Indonesia Electrical and Electronics Retail Sales (IND bn), by Channel Group, 2014–2019

Table 78: Indonesia Electrical and Electronics Retail Sales (US$ mn), by Channel Group, 2014–2019

Table 79: Indonesia Electrical and Electronics Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019

Table 80: Indonesia Electrical and Electronics Retail Segmentation (% value), by Category, 2009–2014

Table 81: Indonesia Communications Equipment Retail Sales (US$ mn), by Channel Group, 2009–2014

Table 82: Indonesia Communications Equipment Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019

Table 83: Indonesia Communications Equipment Retail Sales Forecast (IND bn), by Channel Group, 2014–2019

Table 84: Indonesia Communications Equipment Retail Sales Forecast (IND bn), by Channel Group, 2014–2019

Table 85: Indonesia Communications Equipment Retail Segmentation, by Channel Group, 2009–2019

Table 86: Indonesia Computer Hardware and Software Retail Sales (IND bn), by Channel Group, 2009–2014

Table 87: Indonesia Computer Hardware and Software Retail Sales Forecast (IND bn), by Channel Group, 2014–2019

Table 88: Indonesia Computer Hardware and Software Retail Sales (US$ mn), by Channel Group, 2009–2014

Table 89: Indonesia Computer Hardware and Software Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019

Table 90: Indonesia Computer Hardware and Software Retail Segmentation, by Channel Group, 2009–2019

Table 91: Indonesia Consumer Electronics Retail Sales (IND bn), by Channel Group, 2009–2014

Table 92: Indonesia Consumer Electronics Retail Sales Forecast (IND bn), by Channel Group, 2014–2019

Table 93: Indonesia Consumer Electronics Retail Sales (US$ mn), by Channel Group, 2009–2014

Table 94: Indonesia Consumer Electronics Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019

Table 95: Indonesia Consumer Electronics Retail Segmentation, by Channel Group, 2009–2019

Table 96: Indonesia Household Appliances Retail Sales (IND bn), by Channel Group, 2009–2014

Table 97: Indonesia Household Appliances Retail Sales Forecast (IND bn), by Channel Group, 2014–2019

Table 98: Indonesia Household Appliances Retail Sales (US$ mn), by Channel Group, 2009–2014

Table 99: Indonesia Household Appliances Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019

Table 100: Indonesia Household Appliances Retail Segmentation, by Channel Group, 2009–2019

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Table 101: Indonesia Photographic Equipment Retail Sales (IND bn), by Channel Group, 2009–2014 ........................................ 88
Table 102: Indonesia Photographic Equipment Retail Sales Forecast (IND bn), by Channel Group, 2014–2019 ....................... 89
Table 103: Indonesia Photographic Equipment Retail Sales (US$ mn), by Channel Group, 2009–2014 ........................................ 89
Table 104: Indonesia Photographic Equipment Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019 ..................... 90
Table 105: Indonesia Photographic Equipment Retail Segmentation, by Channel Group, 2009–2019 ........................................ 90
Table 106: Indonesia Food and Grocery Retail Sales (IND bn), by Channel Group, 2009–2014 .................................................. 92
Table 107: Indonesia Food and Grocery Retail Sales Forecast (IND bn), by Channel Group, 2014–2019 .................. 93
Table 108: Indonesia Food and Grocery Retail Sales (US$ mn), by Channel Group, 2009–2014 ................................................. 93
Table 109: Indonesia Food and Grocery Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019 ................... 94
Table 110: Indonesia Food and Grocery Retail Segmentation (% value), by Channel Group, 2009–2019 ........................................ 94
Table 111: Indonesia Food and Grocery Retail Sales (IND bn), by Category 2009–2014 ............................................................. 96
Table 112: Indonesia Food and Grocery Retail Sales Forecast (IND bn), by Category 2014–2019 ........................................... 97
Table 113: Indonesia Food and Grocery Retail Sales (US$ mn), by Category, 2009–2014 .......................................................... 97
Table 114: Indonesia Food and Grocery Retail Sales Forecast (US$ mn), by Category, 2014–2019 ............................... 98
Table 115: Indonesia Food and Grocery Retail Segmentation (% value), by Category, 2009–2019 ........................................... 98
Table 116: Indonesia Drinks Retail Sales (IND bn), by Channel Group, 2009–2014 ................................................................. 99
Table 117: Indonesia Drinks Retail Sales Forecast (IND bn), by Channel Group, 2014–2019 ............................................. 100
Table 118: Indonesia Drinks Retail Sales (US$ mn), by Channel Group, 2009–2014 .............................................................. 100
Table 119: Indonesia Drinks Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019 ............................................. 101
Table 120: Indonesia Drinks Retail Segmentation, by Channel Group, 2009–2019 .............................................................. 101
Table 121: Indonesia Household Products Retail Sales (IND bn), by Channel Group, 2009–2014 ........................................ 102
Table 122: Indonesia Household Products Retail Sales Forecast (IND bn), by Channel Group, 2014–2019 ....................... 103
Table 123: Indonesia Household Products Retail Sales (US$ mn), by Channel Group, 2009–2014 ........................................ 103
Table 124: Indonesia Household Products Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019 .................... 104
Table 125: Indonesia Household Products Retail Segmentation, by Channel Group, 2009–2019 ........................................ 104
Table 126: Indonesia Packaged Food Retail Sales (IND bn), by Channel Group, 2009–2014 .................................................. 105
Table 127: Indonesia Packaged Food Retail Sales Forecast (IND bn), by Channel Group, 2014–2019 .................... 106
Table 128: Indonesia Packaged Food Retail Sales (US$ mn), by Channel Group, 2009–2014 ................................................. 106
Table 129: Indonesia Packaged Food Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019 ................... 107
Table 130: Indonesia Packaged Food Retail Segmentation, by Channel Group, 2009–2019 ........................................... 107
Table 131: Indonesia Tobacco Retail Sales (IND bn), by Channel Group, 2009–2014 ............................................................. 108
Table 132: Indonesia Tobacco Retail Sales Forecast (IND bn), by Channel Group, 2014–2019 .................. 109
Table 133: Indonesia Tobacco Retail Sales (US$ mn), by Channel Group, 2009–2014 ...................................................... 109
Table 134: Indonesia Tobacco Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019 .................... 110
Table 135: Indonesia Tobacco Retail Segmentation, by Channel Group, 2009–2019 ...................................................... 110
Table 136: Indonesia Unpackaged Food Retail Sales (IND bn), by Channel Group, 2009–2014 ................................. 111
Table 137: Indonesia Unpackaged Food Retail Sales Forecast (IND bn), by Channel Group, 2014–2019 .................... 112
Table 138: Indonesia Unpackaged Food Retail Sales (US$ mn), by Channel Group, 2009–2014 ........................................ 112
Table 139: Indonesia Unpackaged Food Retail Sales Forecast (US$ mn), by Channel, 2014–2019 .......................... 113
Table 140: Indonesia Unpackaged Food Retail Segmentation, by Channel Group, 2009–2019 ....................................... 113
Table 141: Indonesia Furniture and Floor Coverings Retail Sales (IND bn), by Channel Group, 2009–2014 .................... 115
Table 142: Indonesia Furniture and Floor Coverings Retail Sales Forecast (IND bn), by Channel Group, 2014–2019 ....... 116
Table 143: Indonesia Furniture and Floor Coverings Retail Sales (US$ mn), by Channel Group, 2009–2014 ............ 116
Table 144: Indonesia Furniture and Floor Coverings Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019 ..... 117
Table 145: Indonesia Furniture and Floor Coverings Retail Segmentation (% value), by Channel Group, 2009–2019 ................. 117
Table 146: Indonesia Furniture and Floor Coverings Retail Sales (IND bn), by Category, 2009–2014 ............................ 119
Table 147: Indonesia Furniture and Floor Coverings Retail Sales Forecast (IND bn), by Category 2014–2019 .............. 120
Table 148: Indonesia Furniture and Floor Coverings Retail Sales (US$ mn), by Category, 2009–2014 .............................. 120
Table 149: Indonesia Furniture and Floor Coverings Retail Sales Forecast (US$ mn), by Category, 2014–2019 ...... 121
Table 150: Indonesia Furniture and Floor Coverings Retail Segmentation (% value), by Category, 2009–2019 ................. 121
Table 151: Indonesia Floor Coverings Retail Sales (IND bn), by Channel Group, 2009–2014 ............................................ 122
Table 152: Indonesia Floor Coverings Retail Sales Forecast (IND bn), by Channel Group, 2014–2019 .................... 123
Table 153: Indonesia Floor Coverings Retail Sales (US$ mn), by Channel Group, 2009–2014 ........................................ 123
Table 154: Indonesia Floor Coverings Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019 .......... 124
Table 155: Indonesia Floor Coverings Retail Segmentation, by Channel Group, 2009–2019 ........................................... 124
Table 156: Indonesia Furniture Retail Sales (IND bn), by Channel Group, 2009–2014 ...................................................... 125
Table 157: Indonesia Furniture Retail Sales Forecast (IND bn), by Channel Group, 2014–2019
Table 158: Indonesia Furniture Retail Sales (US$ mn), by Channel Group, 2009–2014
Table 159: Indonesia Furniture Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019
Table 160: Indonesia Furniture Retail Segmentation, by Channel Group, 2009–2019
Table 161: Indonesia Health & Beauty Retail Sales (IND bn), by Channel Group, 2009–2014
Table 162: Indonesia Health & Beauty Retail Sales Forecast (IND bn), by Channel Group, 2014–2019
Table 163: Indonesia Health & Beauty Retail Sales (US$ mn), by Channel Group, 2009–2014
Table 164: Indonesia Health & Beauty Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019
Table 165: Indonesia Health & Beauty Segmentation (% value), by Channel Group, 2009–2019
Table 166: Indonesia Health & Beauty Retail Sales (IND bn), by Category, 2009–2014
Table 167: Indonesia Health & Beauty Retail Sales Forecast (IND bn), by Category 2014–2019
Table 168: Indonesia Health & Beauty Retail Sales (US$ mn), by Category, 2009–2014
Table 169: Indonesia Health & Beauty Retail Sales Forecast (US$ mn), by Category, 2014–2019
Table 170: Indonesia Home and Garden Products Retail Sales (IND bn), by Channel Group, 2009–2014
Table 171: Indonesia Home and Garden Products Retail Sales Forecast (IND bn), by Channel Group, 2014–2019
Table 172: Indonesia Home and Garden Products Retail Sales (US$ mn), by Channel Group, 2009–2014
Table 173: Indonesia Home and Garden Products Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019
Table 174: Indonesia Home and Garden Products Retail Segmentation (% value), by Channel Group, 2009–2019
Table 175: Indonesia Home and Garden Products Retail Sales (IND bn), by Category, 2009–2014
Table 176: Indonesia Home and Garden Products Retail Sales Forecast (IND bn), by Category 2014–2019
Table 177: Indonesia Home and Garden Products Retail Sales (US$ mn), by Category, 2009–2014
Table 178: Indonesia Home and Garden Products Retail Sales Forecast (US$ mn), by Category, 2014–2019
Table 179: Indonesia Home and Garden Products Retail Segmentation (% value), by Category, 2009–2019
Table 180: Indonesia Gardening and Outdoor Living Retail Sales (IND bn), by Channel Group, 2009–2014
Table 181: Indonesia Gardening and Outdoor Living Retail Sales Forecast (IND bn), by Channel Group, 2014–2019
Table 182: Indonesia Gardening and Outdoor Living Retail Sales (US$ mn), by Channel Group, 2009–2014
Table 183: Indonesia Gardening and Outdoor Living Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019
Table 184: Indonesia Gardening and Outdoor Living Retail Segmentation, by Channel Group, 2009–2019
Table 185: Indonesia Home Improvement Retail Sales (IND bn), by Channel Group, 2009–2014
Table 186: Indonesia Home Improvement Retail Sales Forecast (IND bn), by Channel Group, 2014–2019
Table 187: Indonesia Home Improvement Retail Sales (US$ mn), by Channel Group, 2009–2014
Table 188: Indonesia Home Improvement Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019
Table 189: Indonesia Home Improvement Retail Segmentation, by Channel Group, 2009–2019
Table 190: Indonesia Homewares Retail Sales (IND bn), by Channel Group, 2009–2014
Table 191: Indonesia Homewares Retail Sales Forecast (IND bn), by Channel Group, 2014–2019
Table 192: Indonesia Homewares Retail Sales (US$ mn), by Channel Group, 2009–2014
Table 193: Indonesia Homewares Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019
Table 194: Indonesia Homewares Retail Segmentation, by Channel Group, 2009–2019
Table 195: Indonesia Music, Video and Entertainment Software Retail Sales (IND bn), by Channel Group, 2009–2014
Table 196: Indonesia Music, Video and Entertainment Software Retail Sales Forecast (IND bn), by Channel Group, 2014–2019
Table 197: Indonesia Music, Video and Entertainment Software Retail Sales (US$ mn), by Channel Group, 2009–2014
Table 198: Indonesia Music, Video and Entertainment Software Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019
Table 199: Indonesia Music, Video and Entertainment Software Retail Sales Forecast (% value), by Channel Group, 2009–2019
Table 200: Indonesia Music, Video and Entertainment Software Retail Sales (IND bn), by Category, 2009–2014
Table 201: Indonesia Music, Video and Entertainment Software Retail Sales Forecast (IND bn), by Category 2014–2019
Table 202: Indonesia Music, Video and Entertainment Software Retail Sales (US$ mn), by Category, 2009–2014
Table 203: Indonesia Music, Video and Entertainment Software Retail Sales Forecast (US$ mn), by Category, 2014–2019
Table 204: Indonesia Music, Video and Entertainment Software Retail Segmentation (% value), by Category 2009–2019
Table 205: Indonesia Games Software Retail Sales (IND bn), by Channel Group, 2009–2014
Table 206: Indonesia Games Software Retail Sales Forecast (IND bn), by Channel Group, 2014–2019
Table 207: Indonesia Games Software Retail Sales (US$ mn), by Channel Group, 2009–2014
Table 208: Indonesia Games Software Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019
Table 209: Indonesia Games Software Retail Segmentation, by Channel Group, 2009–2019

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<table>
<thead>
<tr>
<th>Table</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>210</td>
<td>Indonesia Music and Video Retail Sales (IND bn), by Channel Group, 2009–2014</td>
</tr>
<tr>
<td>211</td>
<td>Indonesia Music and Video Retail Sales Forecast (IND bn), by Channel Group, 2014–2019</td>
</tr>
<tr>
<td>212</td>
<td>Indonesia Music and Video Retail Sales (US$ mn), by Channel Group, 2009–2014</td>
</tr>
<tr>
<td>213</td>
<td>Indonesia Music and Video Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019</td>
</tr>
<tr>
<td>214</td>
<td>Indonesia Music and Video Retail Segmentation, by Channel Group, 2009–2019</td>
</tr>
<tr>
<td>215</td>
<td>Indonesia Sports and Leisure Equipment Retail Sales (IND bn), by Channel Group, 2009–2014</td>
</tr>
<tr>
<td>216</td>
<td>Indonesia Sports and Leisure Equipment Retail Sales Forecast (IND bn), by Channel Group, 2014–2019</td>
</tr>
<tr>
<td>217</td>
<td>Indonesia Sports and Leisure Equipment Retail Sales (US$ mn), by Channel Group, 2009–2014</td>
</tr>
<tr>
<td>218</td>
<td>Indonesia Sports and Leisure Equipment Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019</td>
</tr>
<tr>
<td>219</td>
<td>Indonesia Sports and Leisure Equipment Retail Segmentation (% value), by Channel Group, 2009–2019</td>
</tr>
<tr>
<td>220</td>
<td>Indonesia Sports and Leisure Equipment Retail Sales (IND bn), by Category, 2009–2014</td>
</tr>
<tr>
<td>221</td>
<td>Indonesia Sports and Leisure Equipment Retail Sales Forecast (IND bn), by Category 2014–2019</td>
</tr>
<tr>
<td>222</td>
<td>Indonesia Sports and Leisure Equipment Retail Sales (US$ mn), by Category, 2009–2014</td>
</tr>
<tr>
<td>223</td>
<td>Indonesia Sports and Leisure Equipment Retail Sales Forecast (US$ mn), by Category 2014–2019</td>
</tr>
<tr>
<td>224</td>
<td>Indonesia Sports and Leisure Equipment Retail Segmentation (% value), by Category 2009–2019</td>
</tr>
<tr>
<td>225</td>
<td>Indonesia Sports Equipment Retail Sales (IND bn), by Channel Group, 2009–2014</td>
</tr>
<tr>
<td>226</td>
<td>Indonesia Sports Equipment Retail Sales Forecast (IND bn), by Channel Group, 2014–2019</td>
</tr>
<tr>
<td>227</td>
<td>Indonesia Sports Equipment Retail Sales (US$ mn), by Channel Group, 2009–2014</td>
</tr>
<tr>
<td>228</td>
<td>Indonesia Sports Equipment Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019</td>
</tr>
<tr>
<td>229</td>
<td>Indonesia Sports Equipment Retail Segmentation, by Channel Group, 2009–2019</td>
</tr>
<tr>
<td>230</td>
<td>Indonesia Toys and Games Retail Sales (IND bn), by Channel Group, 2009–2014</td>
</tr>
<tr>
<td>231</td>
<td>Indonesia Toys and Games Retail Sales Forecast (IND bn), by Channel Group, 2014–2019</td>
</tr>
<tr>
<td>232</td>
<td>Indonesia Toys and Games Retail Sales (US$ mn), by Channel Group, 2009–2014</td>
</tr>
<tr>
<td>233</td>
<td>Indonesia Toys and Games Retail Sales Forecast (US$ mn), by Channel Group, 2014–2019</td>
</tr>
<tr>
<td>234</td>
<td>Indonesia Toys and Games Retail Segmentation, by Channel Group, 2009–2019</td>
</tr>
<tr>
<td>235</td>
<td>Indonesia Value Retailers Sales (IND bn), by Channel, 2009–2014</td>
</tr>
<tr>
<td>236</td>
<td>Indonesia Value Retailers Sales Forecast (IND bn), by Channel, 2014–2019</td>
</tr>
<tr>
<td>237</td>
<td>Indonesia Value Retailers Sales (US$ mn), by Channel, 2009–2014</td>
</tr>
<tr>
<td>238</td>
<td>Indonesia Value Retailers Sales Forecast (US$ mn), by Channel, 2014–2019</td>
</tr>
<tr>
<td>239</td>
<td>Indonesia Value Retailers Segmentation (% value), by Channel, 2009–2019</td>
</tr>
<tr>
<td>240</td>
<td>Indonesia Value Retailers Sales (IND bn), by Category Group, 2009–2014</td>
</tr>
<tr>
<td>241</td>
<td>Indonesia Value Retailers Sales Forecast (IND bn), by Category Group, 2014–2019</td>
</tr>
<tr>
<td>242</td>
<td>Indonesia Value Retailers Sales (US$ mn), by Category Group, 2009–2014</td>
</tr>
<tr>
<td>243</td>
<td>Indonesia Value Retailers Sales Forecast (US$ mn), by Category Group, 2014–2019</td>
</tr>
<tr>
<td>244</td>
<td>Indonesia Value Retailers Segmentation (% value), by Category Group, 2009–2019</td>
</tr>
<tr>
<td>245</td>
<td>Indonesia Cash and Carries and Warehouse Clubs Sales (IND bn), by Channel Group, 2009–2014</td>
</tr>
<tr>
<td>246</td>
<td>Indonesia Cash and Carries and Warehouse Clubs Sales Forecast (IND bn), by Channel Group, 2014–2019</td>
</tr>
<tr>
<td>247</td>
<td>Indonesia Cash and Carries and Warehouse Clubs Sales (US$ mn), by Channel Group, 2009–2014</td>
</tr>
<tr>
<td>248</td>
<td>Indonesia Cash and Carries and Warehouse Clubs Sales Forecast (US$ mn), by Channel Group, 2014–2019</td>
</tr>
<tr>
<td>249</td>
<td>Indonesia Cash and Carries and Warehouse Clubs Segmentation (% value), by Category Group, 2009–2019</td>
</tr>
<tr>
<td>250</td>
<td>Indonesia Value, Variety Stores and General Merchandise Retailers Sales (IND bn), by Category Group, 2009–2014</td>
</tr>
<tr>
<td>251</td>
<td>Indonesia Value, Variety Stores and General Merchandise Retailers Sales Forecast (IND bn), by Category Group, 2014–2019</td>
</tr>
<tr>
<td>252</td>
<td>Indonesia Value, Variety Stores and General Merchandise Retailers Sales (US$ mn), by Category Group, 2009–2014</td>
</tr>
<tr>
<td>253</td>
<td>Indonesia Value, Variety Stores and General Merchandise Retailers Sales Forecast (US$ mn), by Category Group, 2014–2019</td>
</tr>
<tr>
<td>254</td>
<td>Indonesia Value, Variety Stores and General Merchandise Retailers Segmentation (% value), by Category Group, 2014–2019</td>
</tr>
<tr>
<td>255</td>
<td>Indonesia General Retailers Sales (IND bn), by Channel, 2009–2014</td>
</tr>
<tr>
<td>256</td>
<td>Indonesia General Retailers Sales Forecast (IND bn), by Channel, 2014–2019</td>
</tr>
<tr>
<td>257</td>
<td>Indonesia General Retailers Sales (US$ mn), by Channel Group, 2009–2014</td>
</tr>
<tr>
<td>258</td>
<td>Indonesia General Retailers Sales Forecast (US$ mn), by Channel, 2014–2019</td>
</tr>
<tr>
<td>259</td>
<td>Indonesia General Retailers Segmentation (% value), by Channel 2009–2019</td>
</tr>
<tr>
<td>260</td>
<td>Indonesia General Retailers Sales (IND bn), by Category Group, 2009–2014</td>
</tr>
</tbody>
</table>
Table 261: Indonesia General Retailers Sales Forecast (IND bn), by Category Group, 2014–2019 ........................................ 209
Table 262: Indonesia General Retailers Sales (US$ mn), by Category Group, 2009–2014 ............................................. 210
Table 263: Indonesia General Retailers Sales Forecast (US$ mn), by Category Group, 2014–2019 ................................... 211
Table 264: Indonesia General Retailers Segmentation (% value), by Category Group, 2009–2019 ..................................... 212
Table 265: Indonesia Convenience Stores (including Independents) and Gas Stations Sales (IND bn), by Category Group, 2009–2014 .................................................. 214
Table 266: Indonesia Convenience Stores (including Independents) and Gas Stations Sales Forecast (IND bn), by Category Group, 2014–2019 .................................................. 215
Table 267: Indonesia Convenience Stores (including Independents) and Gas Stations Sales (US$ mn), by Category Group, 2009–2014 ............................................. 216
Table 268: Indonesia Convenience Stores (including Independents) and Gas Stations Sales Forecast (US$ mn), by Category Group, 2014–2019 ............................................. 217
Table 269: Indonesia Convenience Stores (including Independents) and Gas Stations Segmentation (% value), by Category Group, 2009–2019 ............................................. 218
Table 270: Indonesia Department Stores Sales (IND bn), by Category Group, 2009–2014 ............................................. 220
Table 271: Indonesia Department Stores Sales Forecast (IND bn), by Category Group, 2014–2019 ................................... 221
Table 272: Indonesia Department Stores Sales (US$ mn), by Category Group, 2009–2014 ............................................. 222
Table 273: Indonesia Department Stores Sales Forecast (US$ mn), by Category Group, 2014–2019 ................................... 223
Table 274: Indonesia Department Stores Segmentation (% value), by Category Group, 2009–2019 ..................................... 224
Table 275: Indonesia Hypermarkets, Supermarkets and Hard-Discounters Sales (IND bn), by Category Group, 2009–2014 226
Table 276: Indonesia Hypermarkets, Supermarkets and Hard-Discounters Sales Forecast (IND bn), by Category Group, 2014–2019 .................................................. 227
Table 277: Indonesia Hypermarkets, Supermarkets and Hard-Discounters Sales (US$ mn), by Category Group, 2009–2014228
Table 278: Indonesia Hypermarkets, Supermarkets and Hard-Discounters Sales Forecast (US$ mn), by Category Group, 2014–2019 .................................................. 229
Table 279: Indonesia Hypermarkets, Supermarkets and Hard-Discounters Segmentation (% value), by Category Group, 2009–2019 ............................................. 230
Table 280: Indonesia Vending Machines Sales (IND bn), by Category Group, 2009–2014 ............................................. 232
Table 281: Indonesia Vending Machines Sales Forecast (IND bn), by Category Group, 2014–2019 ................................... 233
Table 282: Indonesia Vending Machines Sales (US$ mn), by Category Group, 2009–2014 ............................................. 234
Table 283: Indonesia Vending Machines Sales Forecast (US$ mn), by Category Group, 2014–2019 ................................... 235
Table 284: Indonesia Vending Machines Segmentation (% value), by Category Group, 2009–2019 ..................................... 236
Table 285: Indonesia Other General and Non-Specialist Retailers Sales (IND bn), by Category Group, 2009–2014 ........ 238
Table 286: Indonesia Other General and Non-Specialist Retailers Sales Forecast (IND bn), by Category Group, 2014–2019 ............. 239
Table 287: Indonesia Other General and Non-Specialist Retailers Sales (US$ mn), by Category Group, 2009–2014 .... 240
Table 288: Indonesia Other General and Non-Specialist Retailers Sales Forecast (US$ mn), by Category Group, 2014–2019 .......... 241
Table 289: Indonesia Other General and Non-Specialist Retailers Segmentation (% value), by Category Group, 2009–2019 ...... 242
Table 290: Indonesia Specialist Retailers Sales (IND bn), by Channel, 2009–2014 ............................................................... 245
Table 291: Indonesia Specialist Retailers Sales Forecast (IND bn), by Channel, 2014–2019 ................................................. 246
Table 292: Indonesia Specialist Retailers Sales (US$ mn), by Channel, 2009–2014 ............................................................... 247
Table 293: Indonesia Specialist Retailers Sales Forecast (US$ mn), by Channel, 2014–2019 ................................................. 248
Table 294: Indonesia Specialist Retailers Segmentation (% value), by Channel, 2009–2019 ..................................................... 249
Table 295: Indonesia Specialist Retailers Sales (IND bn), by Category Group, 2009–2014 ................................................. 252
Table 296: Indonesia Specialist Retailers Sales Forecast (IND bn), by Category Group, 2014–2019 ................................... 253
Table 297: Indonesia Specialist Retailers Sales (US$ mn), by Category Group, 2009–2014 ................................................. 254
Table 298: Indonesia Specialist Retailers Sales Forecast (US$ mn), by Category Group, 2014–2019 ................................... 255
Table 299: Indonesia Specialist Retailers Segmentation (% value), by Category Group, 2009–2019 ..................................... 256
Table 300: Indonesia Clothing, Footwear, Accessories and Luxury Goods Specialists Sales (IND bn), by Category Group, 2009–2014 ................................................. 258
Table 301: Indonesia Clothing, Footwear, Accessories and Luxury Goods Specialists Sales Forecast (IND bn), by Category Group, 2014–2019 ................................................. 259
Table 302: Indonesia Clothing, Footwear, Accessories and Luxury Goods Specialists Sales (US$ mn), by Category Group, 2009–2014 ................................................. 260
Table 303: Indonesia Clothing, Footwear, Accessories and Luxury Goods Specialists Sales Forecast (US$ mn), by Category Group, 2014–2019 ................................................................. 261
Table 304: Indonesia Clothing, Footwear, Accessories and Luxury Goods Specialists Segmentation (% value), by Category Group, 2009–2019 ................................................................. 262
Table 305: Indonesia Drug Stores and Health and Beauty Stores Sales (IND bn), by Category Group, 2009–2014 ................................................................. 264
Table 306: Indonesia Drug Stores and Health and Beauty Stores Sales Forecast (IND bn), by Category Group, 2014–2019 ................................................................. 265
Table 307: Indonesia Drug Stores and Health and Beauty Stores Sales (US$ mn), by Category Group, 2009–2014 ................................................................. 266
Table 308: Indonesia Drug Stores and Health and Beauty Stores Sales Forecast (US$ mn), by Category Group, 2014–2019 ................................................................. 267
Table 309: Indonesia Drug Stores and Health and Beauty Stores Segmentation (% value), by Category Group, 2009–2019 ................................................................. 268
Table 310: Indonesia Duty Free Retailers Sales (IND bn), by Category Group, 2009–2014 ................................................................. 270
Table 311: Indonesia Duty Free Retailers Sales Forecast (IND bn), by Category Group, 2014–2019 ................................................................. 271
Table 312: Indonesia Duty Free Retailers Sales (US$ mn), by Category Group, 2009–2014 ................................................................. 272
Table 313: Indonesia Duty Free Retailers Sales Forecast (US$ mn), by Category Group, 2014–2019 ................................................................. 273
Table 314: Indonesia Duty Free Retailers Segmentation (% value), by Category Group, 2009–2019 ................................................................. 274
Table 315: Indonesia Electrical and Electronics Specialists Sales (IND bn), by Category Group, 2009–2014 ................................................................. 276
Table 316: Indonesia Electrical and Electronics Specialists Sales Forecast (IND bn), by Category Group, 2014–2019 ................................................................. 277
Table 317: Indonesia Electrical and Electronics Specialists Sales (US$ mn), by Category Group, 2009–2014 ................................................................. 278
Table 318: Indonesia Electrical and Electronics Specialists Sales Forecast (US$ mn), by Category Group, 2014–2019 ................................................................. 279
Table 319: Indonesia Electrical and Electronics Specialists Segmentation (% value), by Category Group, 2009–2019 ................................................................. 280
Table 320: Indonesia Food and Drinks Specialists Sales (IND bn), by Category Group, 2009–2014 ................................................................. 282
Table 321: Indonesia Food and Drinks Specialists Sales Forecast (IND bn), by Category Group, 2014–2019 ................................................................. 283
Table 322: Indonesia Food and Drinks Specialists Sales (US$ mn), by Category Group, 2009–2014 ................................................................. 284
Table 323: Indonesia Food and Drinks Specialists Sales Forecast (US$ mn), by Category Group, 2014–2019 ................................................................. 285
Table 324: Indonesia Food and Drinks Specialists Segmentation (% value), by Category Group, 2009–2019 ................................................................. 286
Table 325: Indonesia Home Furniture and Homewares Retailers Sales (IND bn), by Category Group, 2009–2014 ................................................................. 288
Table 326: Indonesia Home Furniture and Homewares Retailers Sales Forecast (IND bn), by Category Group, 2014–2019 ................................................................. 289
Table 327: Indonesia Home Furniture and Homewares Retailers Sales (US$ mn), by Category Group, 2009–2014 ................................................................. 290
Table 328: Indonesia Home Furniture and Homewares Retailers Sales Forecast (US$ mn), by Category Group, 2014–2019 ................................................................. 291
Table 329: Indonesia Home Furniture and Homewares Retailers Segmentation (% value), by Category Group, 2009–2019 ................................................................. 292
Table 330: Indonesia Home Improvement and Gardening Supplies Retailers Sales (IND bn), by Category Group, 2009–2014 ................................................................. 294
Table 331: Indonesia Home Improvement and Gardening Supplies Retailers Sales Forecast (IND bn), by Category Group, 2014–2019 ................................................................. 295
Table 332: Indonesia Home Improvement and Gardening Supplies Retailers Sales (US$ mn), by Category Group, 2009–2014 ................................................................. 296
Table 333: Indonesia Home Improvement and Gardening Supplies Retailers Sales Forecast (US$ mn), by Category Group, 2014–2019 ................................................................. 297
Table 334: Indonesia Home Improvement and Gardening Supplies Retailers Segmentation (% value), by Category Group, 2009–2019 ................................................................. 298
Table 335: Indonesia Music, Video, Book, Stationery and Entertainment Software Specialists Sales (IND bn), by Category Group, 2009–2014 ................................................................. 300
Table 336: Indonesia Music, Video, Book, Stationery and Entertainment Software Specialists Sales Forecast (IND bn), by Category Group, 2014–2019 ................................................................. 301
Table 337: Indonesia Music, Video, Book, Stationery and Entertainment Software Specialists Sales (US$ mn), by Category Group, 2009–2014 ................................................................. 302
Table 338: Indonesia Music, Video, Book, Stationery and Entertainment Software Specialists Sales Forecast (US$ mn), by Category Group, 2014–2019 ................................................................. 303
Table 339: Indonesia Music, Video, Book, Stationery and Entertainment Software Specialists Segmentation (% value), by Category Group, 2009–2019 ................................................................. 304
Table 340: Indonesia Other Specialist Retailers Sales (IND bn), by Category Group, 2009–2014 ................................................................. 306
Table 341: Indonesia Other Specialist Retailers Sales Forecast (IND bn), by Category Group, 2014–2019 ................................................................. 307
Table 342: Indonesia Other Specialist Retailers Sales (US$ mn), by Category Group, 2009–2014 ................................................................. 308
Table 343: Indonesia Other Specialist Retailers Sales Forecast (US$ mn), by Category Group, 2014–2019 .......... 309
Table 344: Indonesia Other Specialist Retailers Segmentation (% value), by Category Group, 2009–2019 ............. 310
Table 345: Indonesia Online Retailing Sales (IND bn), by Category Group, 2009–2014 .................................. 313
Table 346: Indonesia Online Retailing Sales Forecast (IND bn), by Category Group, 2014–2019 ..................... 314
Table 347: Indonesia Online Retailing Sales (US$ mn), by Category Group, 2009–2014 .............................. 315
Table 348: Indonesia Online Retailing Sales Forecast (US$ mn), by Category Group, 2014–2019 ..................... 316
Table 349: Indonesia Online Retailing Segmentation (% value), by Category Group, 2009–2019 ..................... 317
Table 350: Indonesia Exchange Rate IND–US$ (Annual Average), 2009–2014 ........................................... 318
Table 351: Indonesia Exchange Rate IND–US$ (Annual Average), 2015–2019 ........................................... 318
Table 352: Conlumino Retail Channel Definitions ......................................................................................... 319
Table 353: Conlumino Retail Category Definitions ......................................................................................... 321
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Last year hundreds of retail businesses across the globe used our research to make critical business decisions.

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