



MINISTRY OF TRADE  
REPUBLIC OF INDONESIA

# RETAIL INDUSTRY IN INDONESIA

A BRIEF OVERVIEW



DIRECTORATE GENERAL FOR NATIONAL EXPORT DEVELOPMENT  
MINISTRY OF TRADE OF THE REPUBLIC INDONESIA  
2023



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## CHAPTER 1

# THE HISTORY OF RETAIL INDUSTRY IN INDONESIA

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*The history of the retail industry in Indonesia reflects the country's economic journey, from traditional markets to a dynamic and diverse retail landscape. Over the decades, the sector has experienced ups and downs, responding to economic crises, technological advancements, and shifting consumer preferences. The current retail landscape in Indonesia is characterized by a blend of traditional markets, modern retail chains, global brands, and an expanding e-commerce ecosystem. The industry's ability to innovate, adapt to changing circumstances, and embrace digital technologies will likely play a crucial role in shaping its future trajectory.*

The retail industry in Indonesia has undergone significant transformations over the years, reflecting the country's economic development, changes in consumer behavior, and evolving market dynamics. The history of the retail sector in Indonesia can be traced through various stages, marked by key events, policy shifts, and economic milestones. In this comprehensive overview, we will explore the history of the retail industry in Indonesia, spanning from the early days to the contemporary landscape.

### ***Early Years and Traditional Markets (Pre-Independence to 1970s)***

The roots of retail in Indonesia can be traced back to traditional markets, known locally as "pasar." These markets served as the primary hubs for buying and selling goods, where local farmers, artisans, and traders engaged in commerce. The economy was largely agrarian, and retail transactions were conducted through barter systems. The Dutch colonial period had a significant influence on trade practices, introducing a more structured system

but also concentrating economic power in the hands of colonial rulers.

### ***Economic Growth and Modernization (1970s to 1990s)***

The 1970s marked a period of economic growth and industrialization in Indonesia. The government implemented policies that aimed to modernize the economy and attract foreign investment. This era witnessed the emergence of shopping centers and modern retail formats. Department stores and supermarkets started gaining popularity in urban areas, offering a more organized and convenient shopping experience. The middle class expanded, leading to increased consumer spending.

### ***Asian Financial Crisis and Its Impact (1997-1998)***

The Asian Financial Crisis in 1997 had a profound impact on Indonesia's economy and, consequently, its retail sector. The devaluation of the Indonesian rupiah led to economic turmoil, a sharp decline in consumer purchasing power, and the closure of



Traditional market (Image source: <https://unsplash.com/@falaqkun>)

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many businesses. Retailers faced challenges such as increased operating costs, reduced consumer confidence, and changing market dynamics. This period marked a setback for the retail industry, but it also prompted resilience and adaptability among surviving businesses.

### ***Rebound and Modernization (Late 1990s to Early 2000s)***

The early 2000s saw Indonesia recovering from the financial crisis, with economic reforms and stabilization measures. The retail industry underwent a phase of recovery and modernization. International retailers began to show interest in the Indonesian market, leading to the entry of global brands. Shopping malls proliferated in major cities, becoming central to the retail landscape. The convenience of air-conditioned malls, a variety of product offerings, and entertainment options attracted consumers.

### ***E-commerce and Digital Disruption (Mid-2000s Onward)***

The mid-2000s marked the advent of e-commerce in Indonesia. With the increasing penetration of the internet and mobile devices, online shopping gained popularity. Local and international e-commerce platforms entered the market, offering consumers an alternative to traditional retail. The growth of e-commerce posed both challenges and opportunities for brick-and-mortar retailers. Traditional retailers adapted by incorporating online channels, and some new players emerged as dominant forces in the digital space.

### ***Rise of Modern Retail Chains and Global Brands (2010s)***

The 2010s witnessed the continued expansion of modern retail chains and global brands in Indonesia. International retailers, attracted by the country's large consumer base and growing middle class, invested in establishing a



presence. This led to increased competition, driving improvements in product quality, customer service, and retail infrastructure. Local retail players also expanded their footprint, contributing to the diversification of the retail landscape.

### **Government Initiatives and Regulatory Changes**

The Indonesian government played a crucial role in shaping the retail industry. Policy initiatives aimed at fostering economic growth, attracting investment, and supporting small businesses have influenced the sector. Regulatory changes, such as adjustments to foreign ownership restrictions, impacted the entry of international retailers. Government initiatives to promote local products

and traditional markets also sought to balance the interests of domestic businesses.

### **Challenges and Opportunities (Current Landscape)**

As of the present day, the Indonesian retail industry faces a mix of challenges and opportunities. The COVID-19 pandemic, which began in 2019, had a significant impact on consumer behavior, supply chains, and the overall retail ecosystem. Retailers had to adapt to changing consumer preferences, implement health and safety measures, and accelerate their digital transformation efforts. E-commerce continues to grow, and the convergence of online and offline retail experiences is shaping the future of the industry.



*Sarinah, the first department store in Indonesia. Founded in 1962, PT Sarinah (Persero) is a State-Owned Enterprise (SOE) specialized in the retail and trade sector. (Image source: [www.sarinah.co.id](http://www.sarinah.co.id))*

## CHAPTER 2

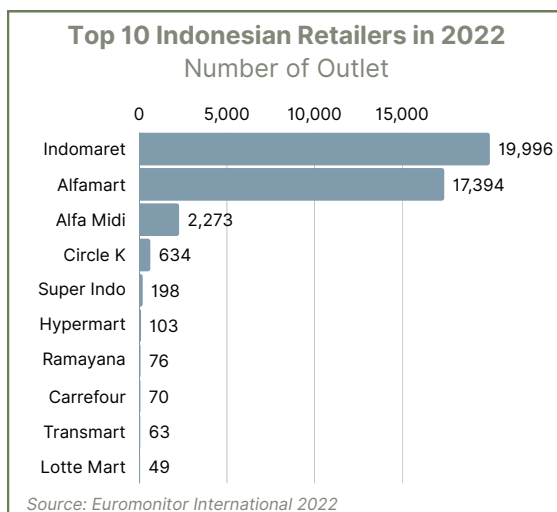
# CLASSIFYING INDONESIA'S RETAIL INDUSTRY

The retail industry in Indonesia exhibits a rich tapestry of diversity, encompassing various segments that cater to the diverse needs and preferences of the population. Classifying the retail sector in Indonesia involves examining different dimensions such as product offerings, distribution channels, ownership structures, service levels, market segments, and business models.

### A. Type of Products Sold

#### a. Food and Grocery Retailers

Supermarkets like *Indomaret* and *Alfamart* dominate this category, providing a wide range of food products, fresh produce, and household essentials. These chains are very common in urban and rural areas, offering convenience to consumers for their daily shopping needs.



#### b. Fashion and Apparel Retailers

Indonesian fashion is well-represented by brands like *Sogo*, *Matahari*, and *Rambla*, as well as international retailers like *H&M* and *Zara*. These stores cater to a diverse consumer base, offering a

range of clothing, footwear, and accessories to meet varied fashion preferences.

#### c. Electronics and Appliances Retailers

Established players like *Electronic City* and online platforms like *Tokopedia* serve the electronics and appliances segment. These retailers provide a diverse array of gadgets, home appliances, and tech products to meet the evolving demands of Indonesian consumers.

#### d. Home Improvement & Furniture Retailers

Furniture retailers such as *Informa* and *Ace Hardware* cater to consumers looking to enhance their homes. These stores offer a variety of furniture, home decor, and improvement products to meet the changing tastes and lifestyle needs of Indonesian households.

#### e. Health and Beauty Retailers

Pharmacies like *Guardian* and beauty retailers such as *Sephora* cater to the health & beauty segment. These stores provide a wide range of skincare, makeup, and healthcare products to satisfy the growing demand for personal care.

### **f. Automotive Retailers**

Automotive retailers like *Astra International* and specialized stores provide a range of products, including vehicles, spare parts, and accessories, meeting the needs of Indonesia's expanding automotive market.

### **g. Sports and Outdoor Retailers**

Sports and outdoor enthusiasts are served by retailers like *Sports Station* and international brands like *Nike* and *Adidas*. These outlets offer sports equipment, apparel, and outdoor gear, catering to the active lifestyle preferences of consumers.

## **B. Distribution Channel**

### **a. Traditional Retailers**

Traditional markets like *Pasar Senen* and local neighborhood stores play a pivotal role in Indonesian retail. These outlets are deeply ingrained in local communities, providing a wide range of products in a traditional marketplace setting.

### **b. Modern Retailers:**

Modern retail giants such as *Lotte Mart* and *Transmart* represent the modern retail landscape. These supermarkets, hypermarkets, and malls offer a more organized and contemporary shopping experience, catering to urban consumers.

### **c. E-commerce & Online Retailers**

E-commerce platforms like *Tokopedia* and *Shopee* have witnessed explosive growth, transforming the retail landscape. These platforms provide a convenient and accessible way for consumers to shop online, offering a vast array of products and services.

## **C. Ownership Structure**

### **a. Local Retailers:**

Family-owned and operated by Indonesian entrepreneurs, local retail businesses such as *Warung Kopi* and *Toko Bangunan* are vital contributors to the local economy. Not only do they provide a sense of tradition, but they also help to maintain traditional retail practices.

### **b. International Retailers**

International retail chains like *IKEA* and *Uniqlo* have made a significant impact on the Indonesian market. These global brands bring diversity, innovation, and international standards to the retail sector, influencing consumer preferences.



Image source: <https://unsplash.com/@novantino>



## D. Level of Service Provided

### a. Specialty Retailers

These stores offer specialized knowledge and a carefully curated selection to cater to the needs of a particular consumer niche. For example, *Gramedia*, a bookstore chain, and *Ace Hardware*, a DIY store.

### b. Department Stores

Department stores provide a comprehensive shopping experience with multiple departments for different product types. For example *Sogo* and *Centro* offer a diverse range of products across various categories under one roof.

### c. Hypermarkets and Supermarkets

Hypermarkets like *Carrefour* and supermarkets like *Hero* are large-scale retail outlets offering groceries, household items, and general merchandise. They provide convenience and a wide product assortment for consumers.

### d. Convenience Stores:

Convenience store chains like *Circle-K* and *7-Eleven* cater to consumers seeking quick and convenient purchases. These stores are open 24/7 and offer a curated selection of products for on-the-go shoppers.

## E. Market Segmentation

### a. Mass Market Retailers

Mass market retailers like *Matahari* and *Giant* cater to a broad consumer base, offering affordable and widely accessible products. They focus on high-volume sales and aim to reach a large segment of the population.

### b. Premium & Luxury Retailers

Premium and luxury retailers like *Plaza Indonesia* and *Pacific Place* target a more affluent customer base. These shopping centers house high-end brands and offer an upscale shopping experience, reflecting the aspirations of a more prosperous demographic.

## F. Business Model

### a. Franchise Retailers

Franchise retail businesses like *KFC* and *McDonald's* operate under established brands with standardized operations. Franchising allows for rapid expansion and ensures a consistent customer experience.

### b. Independent Retailers:

Independent retailers, such as local boutiques and family-owned stores, operate standalone businesses. They have the flexibility to tailor their offerings to local preferences, fostering a personalized and community-centric shopping experience.

In conclusion, the classification of the retail industry in Indonesia underscores its vibrancy and adaptability. The coexistence of traditional markets, modern retail formats, and the surge of e-commerce platforms reflects the sector's resilience and responsiveness to the dynamic needs of Indonesian consumers. This diverse retail landscape is a reflection of the country's economic growth and the ongoing evolution of consumer preferences.

# CHAPTER 3

## THE DEVELOPMENT OF INDONESIA'S RETAIL INDUSTRY

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The retail sector contributes significantly to Indonesia's Gross Domestic Product (GDP). As one of the main sectors of the economy, the retail sector's performance has a direct impact on the economy. In terms of sales, in 2022 retail sales will reach the equivalent of Rp. 1,526.2 Trillion, an increase of 8.6%. This growth is driven by several factors, including:

**1. Large and Growing Population:** Indonesia has the 4th largest population in the world, with over 275 million people. This large and growing population base provides a significant market for retailers.

**2. Growing Middle Class:** Indonesia's middle class is expanding rapidly, with disposable incomes rising. This has led to an increase in consumer spending, particularly on discretionary items. The growth of the economy and the change of consumer behavior in the middle class also caused an enhancement in demand for retail services such as supermarkets and department stores (convenience stores) in urban areas.

**3. Increasing Urbanization:** Indonesia is experiencing rapid urbanization, with more people moving to cities. This has resulted in a growing demand for modern retail formats, such as shopping malls and supermarkets.

**4. Rising Internet Penetration:** Internet penetration in Indonesia is on the rise, with over 70% of the population having

access to the internet. This has led to the growth of e-commerce, which is transforming the retail landscape.

The retail sector is often an early adopter of technology. The integration



Retail industry (Image source: <https://unsplash.com/@bernardhermant>)

of digital platforms, e-commerce, and other technological innovations enhance efficiency within the sector and stimulate technological advancement in other areas.

Nowadays, the retail sector in Indonesia is seeing developments like these:

**1. Growth of E-commerce:** The e-commerce sector continues to thrive in

Indonesia. Major companies like Tokopedia, Bukalapak, and Shopee are dominant, and there is a growing trend of consumers shifting towards online shopping. In 2022, e-commerce accounted for an estimated 11.5% of total retail sales and is expected to reach 21.8% by 2027.

**2. Omnichannel Retailing:** Retailers are increasingly adopting an omnichannel approach, which involves selling products through multiple channels, such as online, offline, and mobile. This allows them to reach customers wherever they are and provide a seamless shopping experience.

**3. Rise of Social Commerce:** Social commerce, which involves selling products through social media platforms, is becoming increasingly popular in Indonesia. This is driven by the high level of social media penetration in the country.

**4. Personalization:** Retailers are using data and analytics to personalize the shopping experience for their customers. This includes recommending products, offering discounts, and providing targeted marketing campaigns.

**5. Sustainability:** Consumers are increasingly interested in buying products from sustainable brands. This is leading retailers to focus on sourcing sustainable products and reducing their environmental impact.

This trend is predicted to continue in the future. Another thing that is driving the development of the retail business in Indonesia is the change in lifestyle of the upper middle class, especially in urban areas who tend to prefer shopping in modern shopping centers.



Online shopping. (Image source: [www.freepik.com/author/tirachardz](http://www.freepik.com/author/tirachardz))

## CHAPTER 4

# THE EXCELLENCE OF INDONESIA'S RETAIL INDUSTRY

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The Indonesian retail industry is a dynamic sector, with a market size valued at USD 46.34 billion in 2022 and projected to reach USD 71.89 billion by 2031, expanding at a CAGR of 5% during the forecast period.

Based on a study conducted by the WTO in 2017, of the four service sector supply modes, mode 3 (commercial presence) is the most important mode in services trade with a transaction value reaching USD 7.8 trillion, dominated by distribution services (retail services) of 19.9%.

Furthermore, the retail sector also serves as a crucial bridge between manufacturers or producers and consumers. It provides a platform for the distribution and sale of goods, allowing producers to reach a wider market and consumers to access a variety of products.

The retail business is characterized by two key factors: "retail is expansion" and "retail is detail". "Retail detail" includes paying attention to discount pricing, marketing, and shop decor. And "retail is expanding"; that is, the number of stores and items it offers determines how big it will develop.

Indonesia's retail sector holds promising export potential due to its unique strengths and growing global demand. Several factors contribute to this optimistic outlook:

**1. Diverse Product Range:** Indonesia boasts a wide variety of products with high export potential, including food & beverages, fashion, furniture & home decoration, and beauty & personal care.

**2. Competitive Price:** Indonesia's retail sector offers high-quality products at competitive prices, making them attractive to import-dependent markets seeking value and affordability. This competitive edge can help Indonesian businesses gain a foothold in international markets.

**3. Growing Global Demand:** With rising disposable incomes and increasing interest in unique and authentic products, global demand for Indonesian retail products is steadily increasing. This trend opens up significant export opportunities for Indonesian businesses.

**4. E-commerce Boom:** Indonesia's booming e-commerce sector offers a robust platform for reaching

*"The retail business is characterized by two key factors: 'retail is expansion' and 'retail is detail'."*





*Company visit from the Saudi Arabian delegation. This agenda is part of the Indonesia-Saudi Arabia Business Forum and Networking, which is held by the Ministry of Trade.*

international customers and facilitating cross-border trade. This enables Indonesian businesses to overcome geographical limitations and tap into new markets.

**5. Government Support:** The Indonesian government provides various initiatives and programs to support export-oriented businesses, including access to financing, trade missions, and export promotion activities. This government support helps businesses navigate international trade regulations and expand their reach.

**6. Free Trade Agreements:** Indonesia has established free trade agreements with several countries, providing exporters with preferential tariffs and

reduced trade barriers, further enhancing their competitiveness in international markets.

By leveraging its strengths, embracing e-commerce, and taking advantage of government support and international trade agreements, Indonesia's retail sector is well-positioned to capitalize on the growing global demand for its unique and competitive products. This presents a significant opportunity for Indonesian businesses to expand their reach, generate foreign exchange, and contribute to the country's economic growth. Moreover, its growth and performance have far-reaching implications for employment, economic stability, and the overall well-being of the population.

# CHAPTER 5

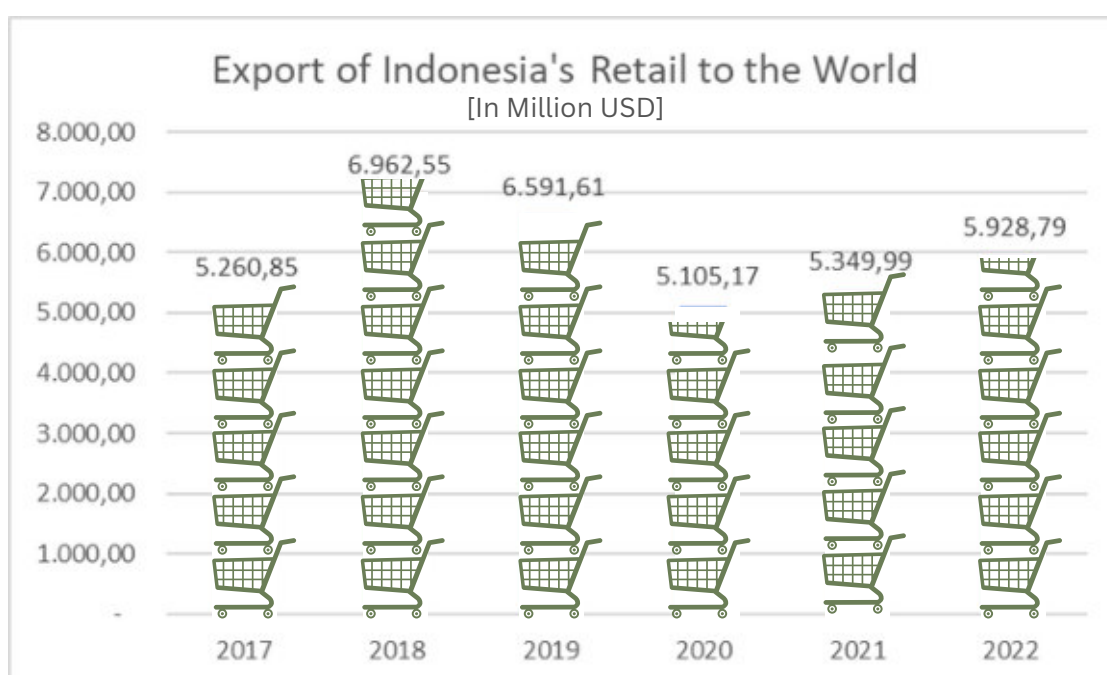
## TRADE WITH INDONESIA

Indonesia's economic growth continues to persist amidst the global economic slowdown. Data from the Central Statistics Agency (BPS) shows that Indonesia's economic growth in the first quarter of 2023 was recorded at 5.03% (Y-o-Y), slightly higher than growth in the previous quarter which was 5.01% (Y-o-Y). Looking ahead, economic growth in 2023 is estimated to remain strong in the range of 4.5% to 5.3%, driven by improving domestic demand and remaining positive export performance.

Economic growth that remains strong is supported by all components of Gross Domestic Product (GDP). Exports continued to grow by 11.68% (Y-o-Y), supported by demand from main trading partner countries which was still

strong. Household consumption improved by growing by 4.54% (Y-o-Y), in line with the growth of the domestic retail sector. The retail services industry continues to grow and develop in Indonesia. Apart from opening up job opportunities, this industry contributes greatly to the Indonesian economy.

The pandemic has indeed caused the economic sector in Indonesia to experience major changes. However, entering 2023, economic conditions are starting to recover and the community's economy is moving in a more dynamic direction. Indonesia does have a significant retail services market share, namely the middle class with high purchasing power and the presence of the millennial generation with greater shopping habits.



Sumber: <https://itip-services-worldbank.wto.org/>

Based on data obtained from the WTO website, when the pandemic hit the world in 2020, Indonesia's retail service exports also experienced a significant decline, reaching -22.55%. The export value was only worth USD 5.1 million compared to the previous year which reached USD 6.59 million. This makes retail service sector entrepreneurs in Indonesia immediately change their business strategies so that they can survive in difficult conditions. This is what made the value of Indonesia's retail services exports in the following year slowly show recovery and began to creep up to USD 5.35 million in 2021, and still had an increase to USD 5.93 million in 2022.

Indonesia, as a member of ASEAN, can become the epicenter of growth for the world in the future. Moreover, with the

current global economic conditions currently experiencing weakness, it could make Indonesia a potential trading partner for other countries. For the retail services sector, Indonesia has many local brands that can be encouraged to expand their markets abroad.

The business categories it runs are also very diverse, including F&B, Restaurant, Café, Fashion, Handbag & Shoes, Jewelry, Watches, Accessories, Hair & Beauty, Electronics, IT & Gadget, Wedding, Optical, Art Crafts & Antiques, Hobbies, Collectible & Gifts, Department Store, Supermarket, Minimarket, Specialty Store, Hypermart, Books & Stationary, Health & Pharmacy, Sports & Lifestyle, Home & Furnishing, Entertainment & Cinema, Playground, etc.



**Miftah Farid**

**Director of  
Export Development for Services and Creative Products**

*"The Ministry of Trade encourages the retail service businesses in Indonesia to expand their operations overseas, particularly in the ASEAN region. This initiative aims to enhance the contribution of the retail services sector towards national exports and improve the sector's recognition abroad."*

**Budihardjo Iduansjah**  
**Chairman of the Indonesian Retailers and Shopping  
Center Tenants Association (HIPPINDO)**

*"The Indonesian retail industry has incredible potential for growth in Asian countries, particularly in the ASEAN region. With the support of the government, businesses have the opportunity to broaden their reach and tap into new markets."*



# INDONESIA TRADE REPRESENTATIVE

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The Minister of Trade serves as the principal advisor to the President of The Republic of Indonesia regarding all trade-related matters, including domestic and international trade. Following the guidance of the Minister of Trade, the President may establish trade agreements with other nations. As a strategic body, the Ministry of Trade aims to promote and enhance sustainable national competitiveness by optimizing all potential resources and developing available opportunities.

To achieve this objective, the Ministry of Trade has contributed significantly to Indonesia's trade growth through its representatives abroad, which include 22 Trade Attaches, Trade Consul Hong Kong, Indonesia Economic & Trade Office in Taipei, and 18 Indonesia Trade Promotion Centers located strategically worldwide.



## Indonesia Economic and Trade Office

Taipei

## Indonesia Trade Attache

Canberra (Australia) - Brussels (Belgium) - Ottawa (Canada) - Beijing (China)  
Cairo (Egypt) - Paris (France) - Berlin (Germany) - New Delhi (India) - Rome (Italy)  
Tokyo (Japan) - Kuala Lumpur (Malaysia) - Den Haag (Netherlands) - Singapore  
Manila (Philippines) - Moscow (Russia) - Riyadh (Saudi Arabia) - Madrid (Spain)  
Seoul (South Korea) - Geneva (Switzerland) - Bangkok (Thailand)  
London (United Kingdom) - Washington DC (USA)

## Indonesia Trade Consul

Hong Kong

## Indonesia Trade Promotion Centre

Sydney (Australia) - Sao Paulo (Brazil) - Vancouver (Canada) - Santiago (Chile)  
Hamburg (Germany) - Budapest (Hungary) - Chennai (India) - Milan (Italy)  
Osaka (Japan) - Mexico City (Mexico) - Lagos (Nigeria) - Jeddah (Saudi Arabia)  
Johannesburg (South Africa) - Busan (South Korea) - Barcelona (Spain)  
Dubai (UAE) - Chicago (USA) - Los Angeles (USA)





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### **Directorate General for National Export Development**

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The Directorate General of National Export Development (DGNEDE) serves as a working unit within the Ministry of Trade responsible for formulating and implementing policies aimed at enhancing the competitiveness of Indonesian export products in the global market, expanding market access for Indonesian goods, and strengthening the competency of Indonesian exporters. DGNEDE has developed a range of programs to achieve these objectives, including identifying new export markets, providing support to exporters and associated stakeholders, organizing trade promotions, conducting nation branding campaigns, and developing the capacity of promotional institutions.

# Contact List

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A photograph of a modern office interior. In the background, a dining area is visible with several people seated at tables. The ceiling features recessed lighting and a long, curved light fixture. In the foreground, a reception desk is partially visible with two water bottles on it. The floor is covered in a pattern of small, light-colored hexagonal tiles.

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