

Retail Network Report

Café

2023 | Indonesia 



GapMaps

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Welcome to the first edition of GapMaps' Retail Network Report for Indonesia's Café Sector. Every year GapMaps brings you unique insights and key trends into the changing competitive landscape of the Café Sector.

Further in depth analysis can be undertaken within the GapMaps platform.



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Brands Tracked

12

Locations

3,840

Stores in Largest Three Cities

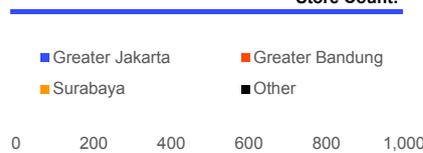
2,214

Cities* with a Kopi Janji Jiwa Store

20%

*Urban agglomerations with at least 50,000 residents

Store Count:



Brand	Store Count
Kopi Janji Jiwa ⁴	Over 900
Kopi Kenangan ⁵	868
Starbucks	566
Chatime	466
J.CO Donuts	254
Kedai Kopi Kulo ⁶	250
Fore Coffee	136
Excelso Coffee	129
Flash Coffee	92
The Coffee Bean & Tea Leaf	72
Maxx Coffee	67
KOI	61

Store Penetration:

Percentage of cities where the brands has at least one store

5 Tier 1a Cities ¹ with over 4 million residents	15 Tier 1b/c Cities ² with over 1 million residents	42 Tier 2 Cities ³ with over 500,000 residents	195 Tier 3 Cities with over 200,000 residents	266 Tier 4 Cities with over 100,000 residents	388 Tier 5 Cities with over 50,000 residents	911 Cities with over 50,000 residents
100%	100%	83%	37%	12%	5%	20%
100%	93%	57%	11%	1%	0%	7%
100%	87%	52%	8%	2%	1%	7%
100%	93%	52%	10%	1%	0%	7%
100%	80%	43%	9%	1%	0%	6%
100%	80%	43%	14%	4%	1%	8%
100%	73%	19%	1%	0%	0%	3%
80%	67%	26%	5%	0%	1%	4%
80%	0%	0%	0%	0%	0%	0%
100%	47%	7%	2%	0%	1%	2%
100%	20%	12%	2%	0%	0%	2%
100%	40%	5%	1%	0%	0%	2%

1. Greater Jakarta, Greater Bandung, Surabaya, Medan, Bogor

2. Candisari, Manggala, Kemuning, Klojen, Gondokusuman, Serengan, Denpasar Utara, Kedaton, Adiwerna, Plumbon, Buaran, Sekupang, Cakranegara, Kembaran, Bungursari

3. Pekanbaru, Gunung Puyuh, Pontianak Selatan, Kota Kudus, Banyuwangi, Mertoyudan, Bangsal, Ngasem, Banjarmasin Timur, Padang Utara, Karawang Timur, Walantaka, Samarinda Seberang, Gondang Wetan, Telanaipura, Karangtengah, Jogo Roto, Kaliwates, Gempol, Pecangaan, Ceper, Sukamulia, Petarukan, Wonoasih, Tuntang, Bungursari, Kedungwaru, Bulakamba, Balikpapan Utara, Kanigoro, Takeran, Hutan, Cibeber, Japara, Setu, Babaken, Tikala, Ingin Jaya, Cikande & Surrounds, Central Lombok, Gondanglegi, Leuwiliang Region

4. No listing of stores on brand website. Website states 900+ locations and GapMaps have confirmed 910 locations across the country.

5. As reported on company website. However company store locator only list 866 locations.

6. Company references over 250 stores in various media reports. Only 221 locations have been verified by GapMaps across the country.

Source: All locations are sourced from the relevant brand's website unless otherwise stated. They have not been confirmed with the brand.