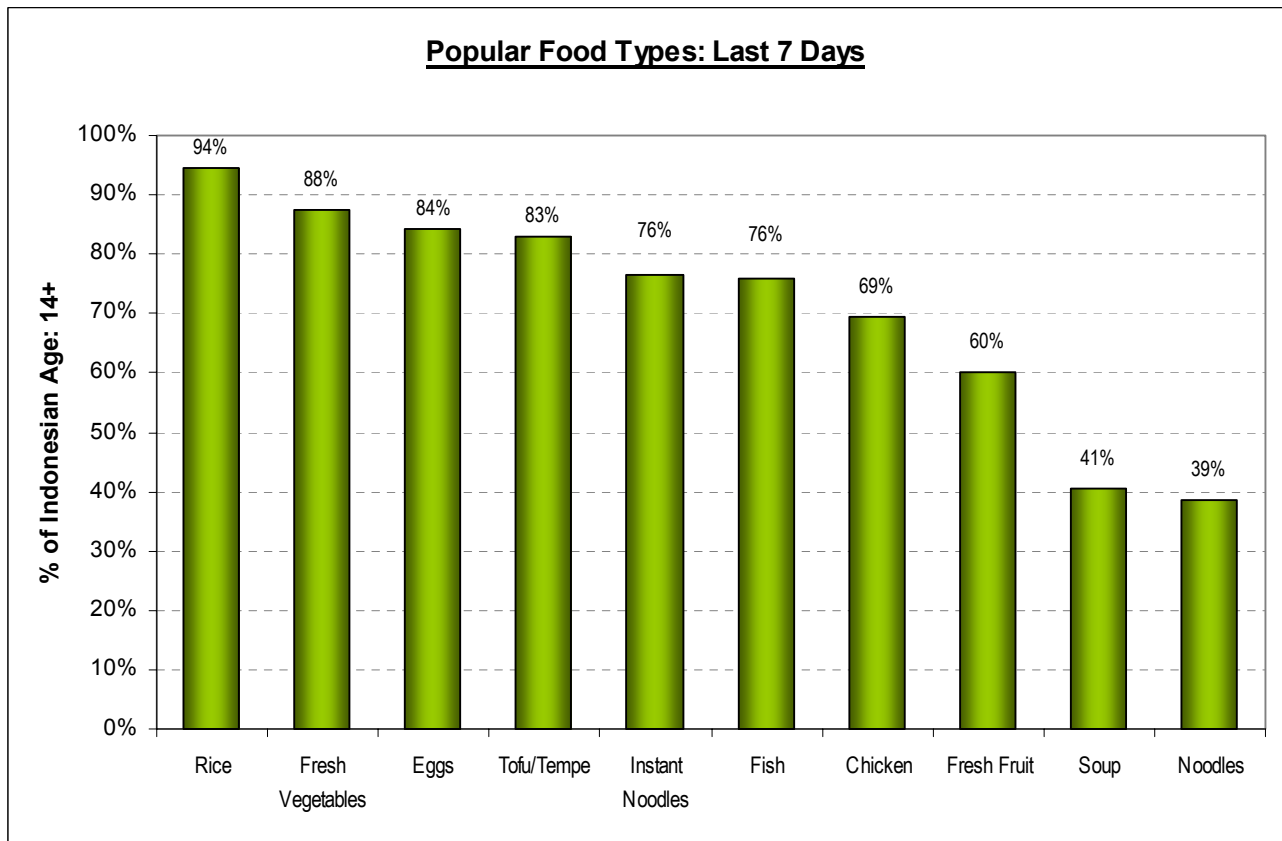


## Share-of-Stomachs in Indonesia Today

What is Indonesia eating? Without talking volumetrics, a look at the range of solid foods going down will reveal the diversity of diet across the country. The simple Satay is the most popular item on the menu, with 68% of Indonesians giving it the thumbs-up. At 43%, Padang is the most popular cuisine, preferred over all others. The information is based on Roy Morgan Single Source, a national survey of over 25,000 respondents annually, covering 90% of Indonesia's population over the age of 14, from both Urban and Rural, including the Top 20 Cities.

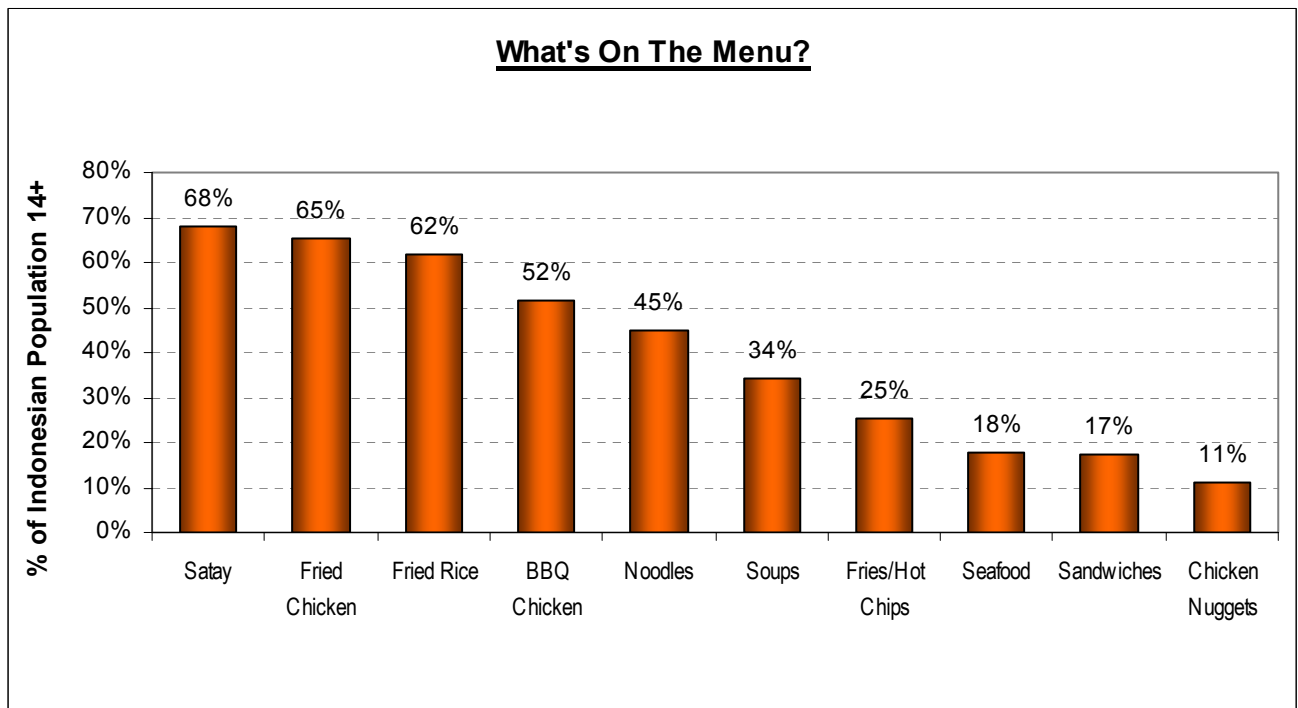
Although rice is Indonesia's predominant staple food, 94% of Indonesians ate it last week, not every man, woman and teenager as we'd probably have guessed. The decline in rice consumption is noticeable only among the poorest of the poor especially after the spiraling inflation of 2005. With their staple of choice, most people eat fresh vegetables, egg or tofu. These three items on the menu have climbed up in popularity during the last year. Among meats, fish followed by chicken have grown, but the more expensive beef has declined in the wake of the fuel price hikes. The precise percentages for meats eaten in the last seven days are fish (76%) followed by chicken (69%), beef (18%) and other seafood (11%). Only five percent of Indonesians have eaten either pork, ham or bacon in the last week.

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The meal comprising rice and an accompanying dish is of course a way of life in Indonesia but Instant Noodles is a strong contender, with 76% having savoured the quick-and-easy alternative in the last seven days. Of all people who bought instant noodles last month, 41% bought Mie Sedaap, followed by Indomie with 31% and Supermie with 13%. In contrast, only 3% would have eaten Porridge last week and plain breads were consumed by just 14%. Six-in-ten people have eaten fruits (60%), usually fresh (99%), sometimes dried (4%) or canned/packageged (4%). In total, 91% of Indonesians aged 14 and over have eaten fruit or vegetables in some form or another in the last seven days.

Like most people, Indonesians prefer their own cuisine compared to any other. The spicy and elaborate Padang fare is clearly the favourite (43%) followed by the more simple Sundanese (32%). International cuisines have very few fans, but among them Asian foods are more accepted. Even the most familiar and popular, which is Chinese, is a far cry (7%) to Indonesian's favourite followed by Indian at under 1%. The only European Cuisine worth mentioning is Italian at 1% and that too is perhaps influenced by that global term 'pizza'.



Traditional fare again dominates the preferred menu of Indonesians with the majority of Indonesians aged 14 and over enjoying Satay (68%), followed very closely by Fried Chicken (65%) and Fried Rice (62%), then BBQ Chicken (52%). No surprises there. A walk past a string of roadside hawkers is the testimony everyday. No wonder that even among the international Fast Food chains operating in Indonesia, fried chicken is still the favourite choice. The latest Roy Morgan Single Source data shows that 14% of Indonesians had purchased Fast Food in the last four weeks. Most of those visitors went to KFC (34%), followed by McDonalds (23%), but chicken was the popular choice even at McDonalds!

Other favourite foods eaten are Noodles (45%) and Soups (34%), while twenty-five percent of Indonesians like eating French Fries, making it the most popular Western food type. French fries are more popular than Seafood (18%), Sandwiches (17%) or even Chicken Nuggets (11%).

Krupuk is the snack most likely (65%) to have been eaten in the last seven days, well ahead of Throat Lozenges/Cough Sweets (25%), “Sweets, Mints or Chewing Gum” (25%), Plain Sweet Biscuits (24%) and Nuts (22%).

For cakes and breads, Indonesians prefer their traditional sweet cakes (38%). When it comes to Western cakes/breads, Muffins/Doughnuts have overtaken Plain Bread with 20% compared to 14%, while 2.5% have eaten Rolls.

With their Plain Bread, Margarine is the spread most likely to be used at home (42%) in the last week, while only 13% use butter. Twenty two percent have spread Jam, Conserves and Marmalades on their bread, followed closely by Peanut Butter (21%), Chocolate/Hazelnut spread (13%) and Cheese (9%). A diverse diet, across society, right across the archipelago!

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