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Creative & Sustainability Communication

Retail Mapping Study:

IDENTIFYING INDONESIA RETAILERS ECOSYSTEM AND READINESS FOR HEALTHY AND SUSTAINABLE DIETS

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Publisher
Yayasan World Wildlife Fund Indonesia, 2026.

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FOREWORD

It is with great pleasure that we present our report on **Retail Mapping Study: Identifying Indonesia Retailers Landscape and Readiness for Healthy and Sustainable Diets this** report reflects WWF-Indonesia's commitment to advancing the transformation of food systems toward a future that is healthier, more resilient, and environmentally sustainable.

Today, the world faces unprecedented challenges from climate change, biodiversity loss, and environmental degradation. Growing evidence shows that food systems are both a significant contributor to these challenges and a critical part of the solution. Transforming the way food is produced, distributed, marketed, and consumed is essential to achieving a sustainable future.

In this context, modern food retailers play a pivotal role as the bridge between producers and consumers. Through product assortment, pricing, promotions, consumer information, and business policies, retailers have a unique opportunity to encourage healthier and more sustainable dietary choices.

This study maps Indonesia's retail ecosystem and assesses the readiness of selected modern retailers to support healthier and more sustainable diets. The study aims to understand current retail practices, market conditions, key barriers, and opportunities for action. The findings are intended to inform future engagement, encourage innovation and collaboration, and identify pathways for retailers and other food-system actors to contribute to the transition toward healthier and more sustainable food systems.

We extend our sincere appreciation to all participating retailers, partners, medias, experts, academics, and stakeholders whose valuable contributions made this research possible. We hope the findings presented in this report will serve as a useful reference for businesses, policymakers, and other stakeholders in shaping strategies that promote healthier, more resilient, and sustainable food systems in Indonesia.

We invite all stakeholders to view this report as a starting point for dialogue and collective action. By working together, we can create a food system that supports both people and nature, ensuring a sustainable future for generations to come.

Dewi Lestari Yani Rizki

Chief Conservation Officer
WWF-Indonesia

DISCLAIMER:

The results of this study reflect conditions during the research period and are not intended as a definitive assessment of the respective retailers' positions. Future changes in policies, business strategies, or operational practices could potentially yield different findings if a similar study were conducted again.

CONTENTS

EXECUTIVE SUMMARY

This report, titled "Retail Mapping Study: Identifying Indonesia Retailers Ecosystem and Readiness for Healthy and Sustainable Diets" explores the actual market condition, barriers and opportunities for integrating healthy and sustainable, planet-based dietary concepts within Indonesia's retail sector. The research utilized a multi-pronged approach, including a Scopus Database Analysis (2016–2026), media monitoring of 156 online news articles (April 2025 – March 2026), in-depth interviews with six major retailers (Toko Daging Nusantara, Ranch Market, Super Indo, Mini M, Pamella, and Nanakam), and a Focus Group Discussion (FGD) with four retailers in Bandung, which are Borma, Lotte, Transmart, and Alfamart.

KEY FINDINGS

a. **The Terminological Gap:** While global interest in sustainable nutrition is growing, the specific term like Healthy & Sustainable Diet, Planet-Based Diet remains nascent. It is virtually absent from academic literature and has a minimal footprint in Indonesian media, appearing in only 1.3% of related articles. Consequently, mainstream retailers unfamiliar with the term, opting instead for practical concepts like "consumption of consciousness" or general healthy eating.

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b. **Current Retail Interventions:** Despite the terminology gap, retailers are actively encouraging sustainable habits through operational strategies. These include prioritizing fresh produce at the front of stores, executing localized zero-waste policies, reducing plastic use, and, in the case of premium retailers, curating specific “Healthy Living” sections with certified sustainable products.

c. **The “Green Adaptation Dilemma”:** Retailers face severe structural barriers, leaving them caught between strict downstream government regulations (such as plastic bans) and an unprepared upstream supply chain. The primary challenges include:

- Price Sensitivity: The lower-middle economic segment is highly sensitive to the premium prices associated with organic and sustainable foods.
- Infrastructure Burdens: The short shelf life of fresh produce and the high investment costs for refrigeration create significant profit margin risks.
- Supply Chain Inconsistencies: There is a limited and unreliable supply of certified sustainable or local products that meet rigorous retail standards.
- “Market Followers” Mandate: Adopting sustainable practices only when mandated by regulation.

Recommendations: WAY FORWARD

Economic and structural barriers may limit the ability of some Indonesian retailers to take a more proactive role in advancing sustainability. The study also identified a terminology and awareness gap around concepts such as Healthy and Sustainable Diets and Planet-Based Diets, which may affect how these ideas are understood and communicated by retailers and consumers. Advancing healthier and more sustainable diets may therefore require both practical support and targeted efforts to mainstream these concepts through clear, accessible, and context-relevant communication. This may include:

a. **Micro-Level Tiered Engagement Strategy:** Because a one-size-fits-all intervention WWF must adopt a tiered prioritization framework based on market readiness collaborative efforts for follow up engagement, could focus on “Primary Strategic Partners” (high-readiness supermarkets that already have initiatives closely aligned with healthier and more sustainable diets) while applying alternative, specialized approaches—such as focusing strictly on local sourcing and waste reduction—for meat-centric businesses, and pivoting to upstream advocacy for infrastructure-constrained convenience retailers.

b. **Macro-Level “Ecosystem Collaboration”:** The burden of change must shift away from individual retailers. This collaborative model demands concrete upstream interventions from the government (financial incentives and supportive regulations), capacity-building for local producers, and grounded, retail-friendly frameworks from NGOs like WWF to ensure sustainable products become accessible and affordable for the broader market. Working with specialized niche media that supports food and health lifestyles would be an advantage to create better awareness. By creating a collaborative campaign to target consumers through intuitive in-store cues by promoting conscious consumption, such as WWF’s **“Beli yang Baik”** framework.

c. **Potential Next Phase: Towards WWF Retailer Methodology**: The tiered engagement approach can guide follow-up actions related to Healthy and Sustainable Diets, with interested and capable retailers potentially progressing to a more structured technical phase using the WWF Retailer Methodology. This step-by-step framework helps retailers strengthen data collection and reporting, measure food product sales, establish a baseline, and identify practical opportunities and targets for transition. While the methodology has not yet been technically applied in this study, a potential next phase could involve direct engagement with priority retailers.

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BACKGROUND

WWF-Indonesia in collaboration with Purupiru Creative & Sustainability Communication to conduct research identifying Indonesia Retailers Ecosystem and Readiness for Healthy and Sustainable Diets.

Global food systems and agriculture production are among the key drivers of the climate crisis, contributing significantly to biodiversity loss, declining water quality, and widespread environmental degradation. According to WWF’s Living Planet Report: A System in Peril, global food systems and agriculture production are among the key drivers of the climate crisis, contributing significantly to biodiversity loss, declining water quality, and widespread environmental degradation. These pressures are further exacerbated by current consumption patterns. WWF’s report Bending the Curve: The Restorative Power of Planet-Based Diets emphasizes that dietary choices are one of the largest determinants of environmental impacts, influencing greenhouse gas emissions, land use change, water use, and the risk of species extinction.

Dietary choices are one of the largest determinants of environmental impacts, influencing greenhouse gas emissions, land use change, water use, and the risk of species extinction. To address the issue, Healthy and Sustainable Diets are important to mainstream and implement across different sectors. Healthy and Sustainable diets are dietary patterns that promote all dimensions of individuals’ health and wellbeing; have low environmental pressure and impact; are accessible, affordable, safe and equitable; and are culturally acceptable.

In Indonesia, the need to transition toward healthier and more sustainable diets is increasingly urgent considering these global challenges. However, shifts in dietary patterns cannot occur independently and are strongly shaped by food availability, accessibility, supply chains, and consumer-facing interventions, including local culinary and tradition. Food retailers, therefore, play a strategic role in shaping food environments and influencing consumer choices through product assortment, pricing, promotions, and marketing strategies.

While traditional market continues to play a vital role in shaping food access and dietary preferences across Indonesia, the past two decades have seen a rapid growth in modern retailers, including supermarket, hypermarket, and minimarket/convenience store. This expansion, driven by rapid urbanization in Indonesia, has increased consumer access to modern retail outlets and strengthened their influence on consumption patterns and dietary behaviors, particularly in urban and peri-urban societies.

Building on this framework, WWF Indonesia conduct a research assessment of selected modern retailers in Indonesia to identify Indonesia Retailers Ecosystem and Readiness for Healthy and Sustainable Diets as well as opportunities to accelerate positive change.

In Indonesia, the need to transition toward healthier and more sustainable diets is increasingly urgent considering these global challenges. Food retailers play a strategic role in shaping food environments and influencing consumer choices through product assortment, pricing, promotions, and marketing strategies.

OBJECTIVES AND METHOD

This study aims to understand the current Indonesian retail ecosystem and retailers' potential readiness to engage on healthier and more sustainable diets, while identifying possible entry points for future intervention and collaboration.

The methods conducted for this research are in these steps:

Data Collection	Detail
Literature review	Comprehensive review of existing reports (e.g. from WWF), academic research, and policy studies to establish a baseline for sustainable dietary patterns and the Indonesian retail landscape. The Scopus Database Analysis examined the evolution of terms such as "Sustainable Diet" and "Planet-Based Diet" from 2016 to 2026.
Desk study of public documentation	Monitoring media coverage over the past year (2025) on food issues, healthy diets, and related issues. The media monitoring phase tracked 156 online news articles from April 2025 to March 2026, focusing on food policies and healthy eating in Indonesia.
Market assessments	Interviews with representatives of retailers about company policies, procurement of goods, consumer targets, sales developments, product variety. Six major retailers were interviewed: Toko Daging Nusantara, Ranch Market, Super Indo, Mini M, Pamella, and Nanakam.
Validation	Four representatives of Bandung retailers Borma, Lotte, Transmart, and Alfamart participated in a Focus Group Discussion.

RESEARCH RESULTS

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LITERATURE ANALYSIS

A. The Evolution of Healthy and Sustainable Diets Terminology

While global research in sustainable nutrition has exploded, its evolving and specialized terminology remains disconnected from popular NGO frameworks.

01

The Academic Umbrella (Sustainable Diet - SD):

- Dominant macro-paradigm with steady long-term growth
- Exponential growth: Document counts increased from just 1 in 1995 and 46 in 2016 to 583 by 2025
- Reflects the field's foundation in academic literature

02

The Scientific Breakthrough (Planetary Health Diet - PHD):

- Rapid emergence and momentum following the 2019 EAT-Lancet Commission report.
- Growth Trajectory: Rose sharply from only 2 documents in 2019 to 124 in 2025
- Highlights how major scientific reports pivot and accelerate scholarly discourse

03

The Academic-Action Gap (Planet-Based Diet - PBD):

- A nascent term primarily used in NGO (WWF) and
- Minimal footprint: Virtually non-existent in Scopus with only 2 total documents recorded by 2026 (one market action frameworks in 2024)
- Indicates a massive gap between public/market advocacy and formal scientific validation

B. Disciplinary Divide: Where Does Discourse Live?

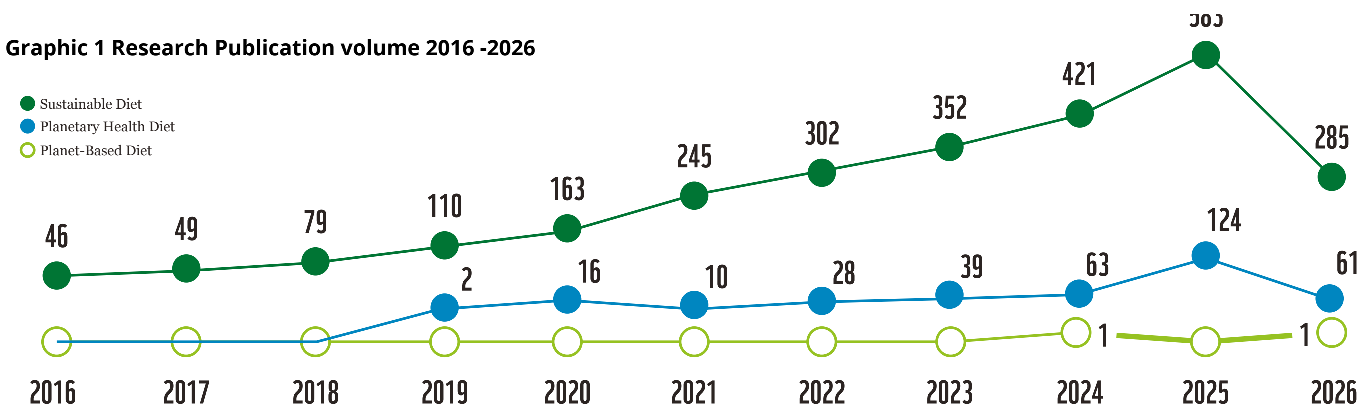
Based on the categories from many publications. Top five disciplinary sectors in Scopus literature are identified:

Clinical & Agricultural Bias: Current research is heavily concentrated on Agricultural Sciences and Medicine, focusing primarily on supply-side modeling and clinical health impacts.

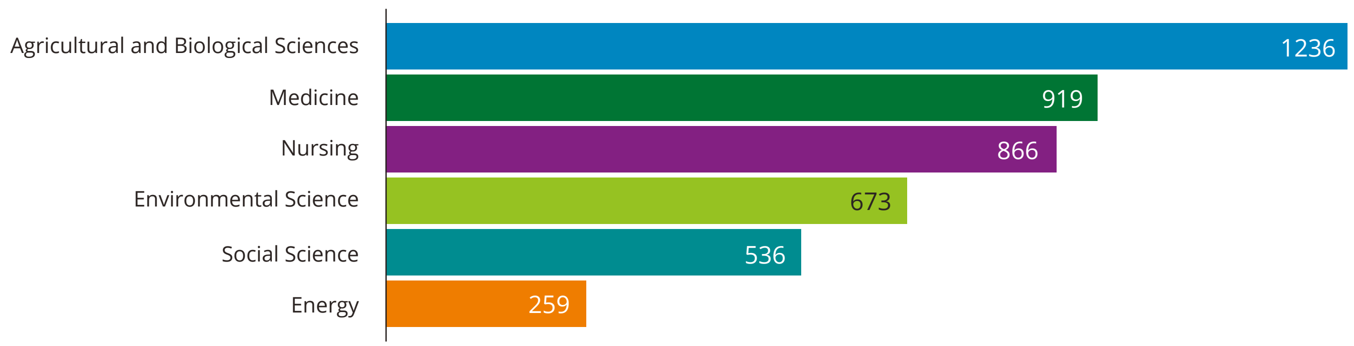
The Business Management Void: There is an extreme deficit in Business and Accounting (e.g., only 4 documents for PHD), revealing a massive gap between scientific frameworks and commercial application.

Retail Research Opportunity: A significant opening exists for academic studies to explore how these dietary metrics translate into downstream commercial systems, such as food retail. In regard to Planet-Based Diet there are only 2 documents related to PBD.

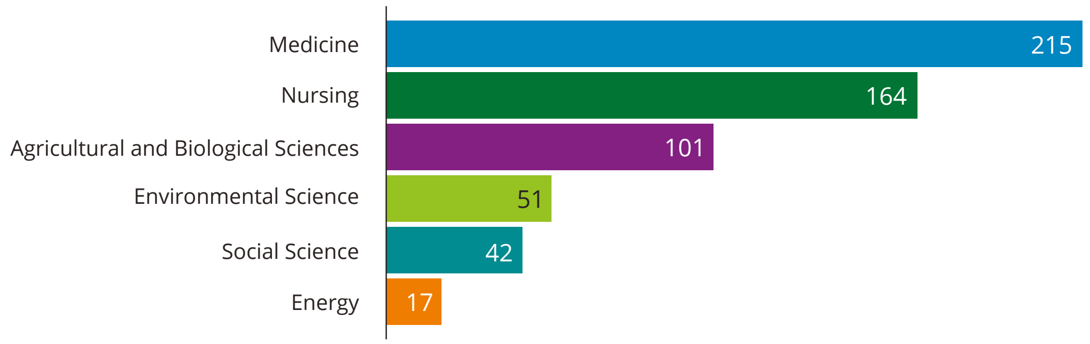
Graphic 1 Research Publication volume 2016 -2026



Graphic 2 Sustainable Diet (SD, n = 2672 docs)



Graphic 3 Planetary Health Diet (PHD, n = 343 docs)



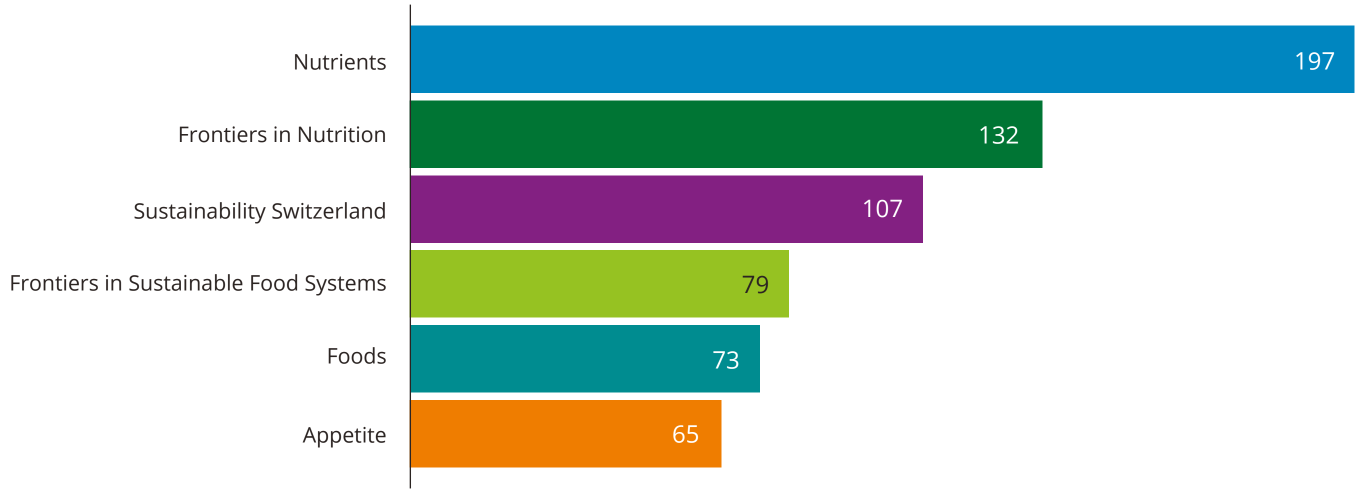
Based on the key journals, the following are the top publication sources and scientific hubs along with the analysis.

High-Impact Hubs: The discourse is primarily shaped and "guarded" by high-impact journal networks, specifically MDPI (Nutrients, Sustainability) and Frontiers, which serve as the primary gatekeepers for sustainable diet research.

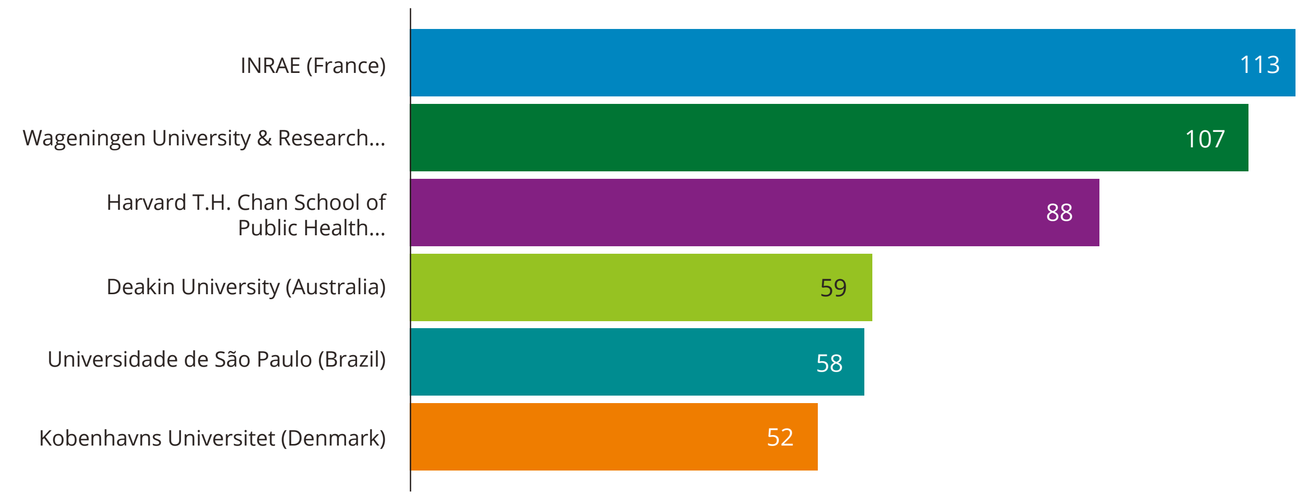
Western Monopoly: Research leadership is heavily concentrated in Western institutions (France, Netherlands, USA, Australia, and Denmark). These hubs largely dictate the global definitions and methodologies of what constitutes a "sustainable diet."

PBD Legacy (Practice-to-Theory): The term "Planet-Based Diet" remains a unique case of "practice-to-theory" origin, stemming from the collaboration between WWF Netherlands and Wageningen University rather than originating within formal academic circles.

Graphic 4 Top Six Publications



Graphic 5 Scientific Hubs



C. Comparison of Planet-Based Diet Research on Scopus Literature

Feature	van Dooren (2024)	van Dooren et al. (2026)
Primary Focus	Review of synergies between hu-man health and environmental sustainability.	Modeling future Dutch diets (2030/2050) to fit within "Plane-tary Boundaries".
Methodology	Literature review and analysis of a database containing 1,891 Dutch recipes.	Mathematical optimization (Opti-meal 3.0) based on natio-nal food consumption surveys.
Protein Transition	Advocates for a general shift from animal-based to plant-based protein.	Specifically targets a shift to 64% plant-based protein (up from the cur-rent 43%).
Dietary Changes	Focus on whole foods, fresh local produce, and reducing ultra-processed items.	Significant reductions in red meat, eggs, fats and sugar.
Meat Limits	Suggests "less animal based foods" and sustainable agricul-tural choices.	Drastic reduction of red meat to 0.5–1.5 servings per week (e.g., 4g/day for men).
Environmental Goal	Target 30% reduction in GHG and 46% less biodiversity loss.	Staying within 5-6 Planetary Bound-aries; 43–83% reduction in GHGE and resource use.
Key Conclusion	Affordability: Budget-friendly healthy recipes have a 23% low-er climate impact.	Feasibility: It is mathematically possible to eat healthily within the planet's ecological limits.

MEDIA ANALYSIS

A. Methodology

This report analyzes online media coverage from April 2025 to March 2026 related to food sustainability, healthy consumption, planetary health diets and public policy to support the study. Selected keywords for capturing media coverage as follows:

1. Diet berkelanjutan (sustainable diet)
2. Pola makan berkelanjutan (sustainable diet)
3. Pola Makan Sehat (healthy meal plan)
4. Makanan organic (organic foods)
5. Plant based diet
6. Planet based diet
7. Kebijakan dan Regulasi Pangan Sehat (Healthy Food Policies and Regulations)
8. Pangan berkelanjutan (Sustainable food)
9. Makanan Sehat (healthy food)
10. Perilaku Diet Konsumen (Consumer diet behavior)
11. Sistem Pangan Sehat dan Berkelanjutan (Healthy and Sustainable Food Systems)
12. Diet ramah lingkungan (Eco-friendly diet)

B. Media Monitoring Findings

Most of the articles focused on healthy eating habits, food policy development, plant-based diet and sustainable consumption. This indicates an increasing public attention toward sustainable food system and healthy lifestyle narrative in Indonesia.

The majority of the coverage has either a neutral or positive tone and shows that the issue is largely considered educational, informative and general information.

The strongest narrative during the monitoring period can be described as follows:

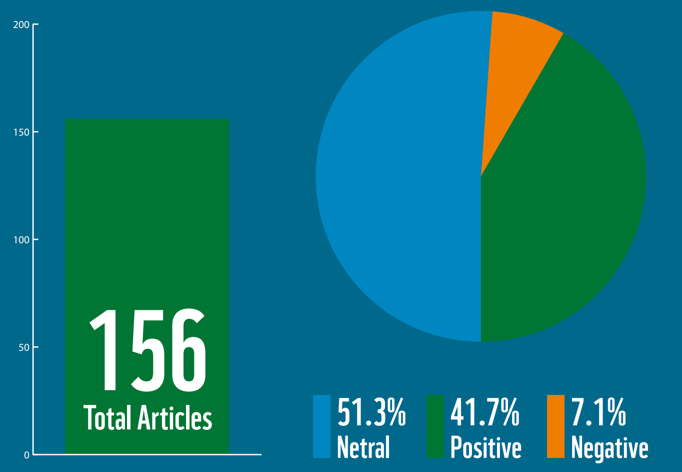
- Healthy eating habits and nutrition awareness
- Government policy and regulations
- Plant-based and sustainable diets
- Organic food consumption and healthy lifestyle
- Sustainable food system and food security

C. Media Coverage Analysis

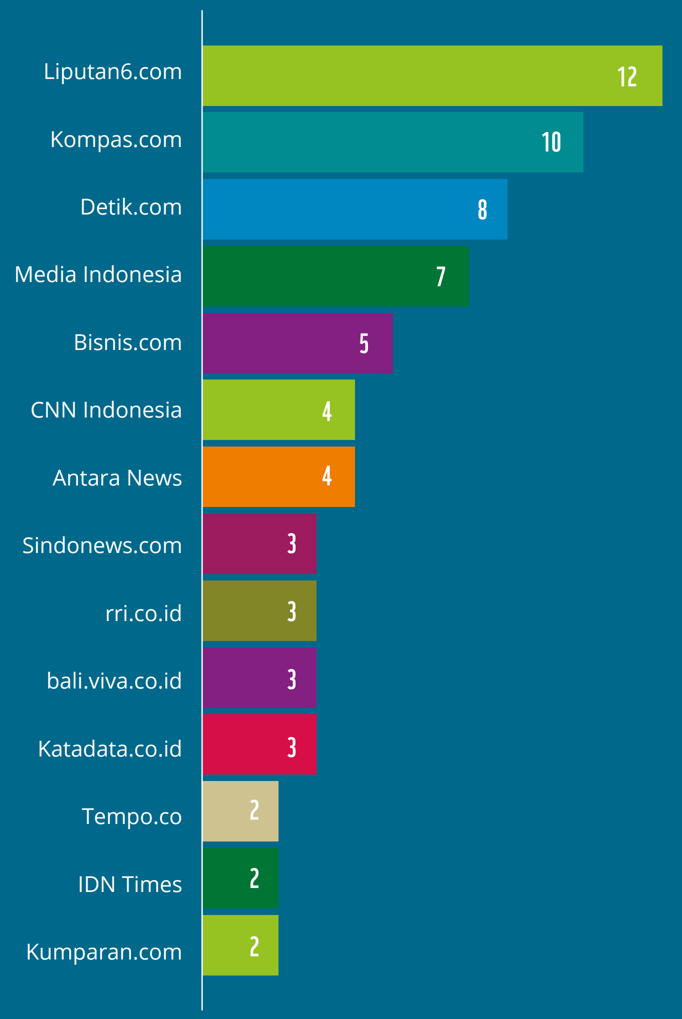
There were 156 news/articles during periods of April 2025 - March 2026 with 51.3% neutral news, 41.7% positive news and 7.1% negative news and all from online media.

Overall, **Liputan6.com** has dominated the publications with 12 articles of 156 related to Plant Based Diet and Sustainable Diets topic. Other Top Tier-1 Media such as Kompas.com with 10 articles, Detik.com 8 articles, Mediaindonesia.com 7 articles, Bisnis.com 5 articles, Antaranews.com and CNNIndonesia.com 4 articles, Sindonews.com, rri.co.id, viva.co.id and katadata.co.id with 3 articles. To note, in IDN Times a special food section called Yummy is dedicated for specific events and focus; Detik has Detikfood, and so does Kumparan, KataData, and GNFI.

Graphic 6 Coverage Tonality



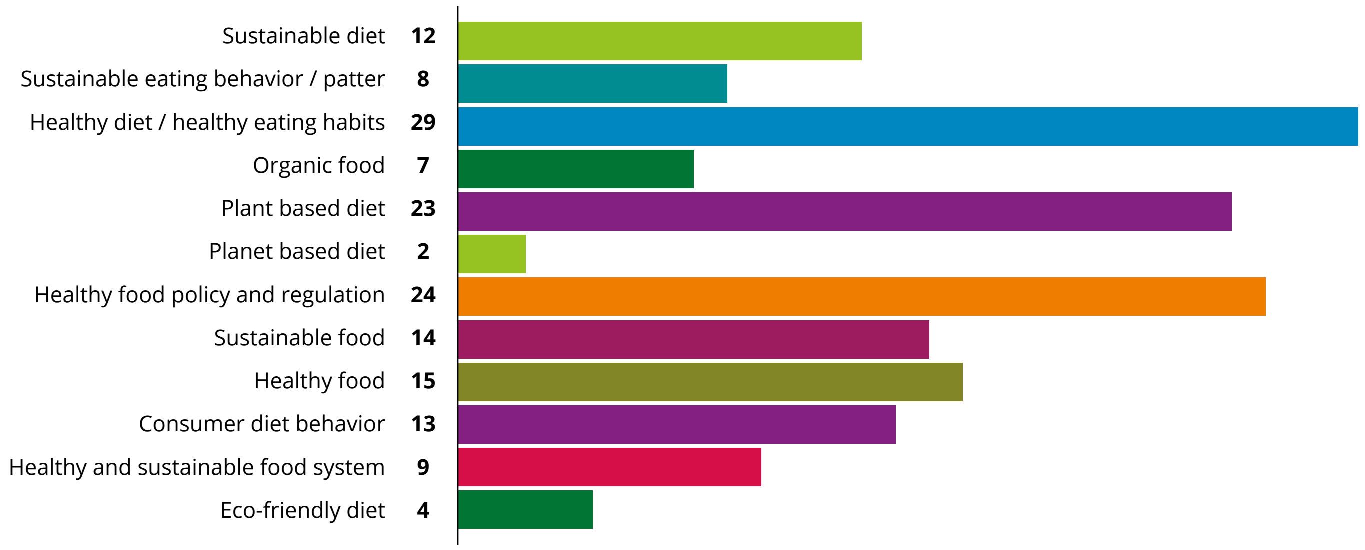
Graphic 7 Media on Sustainable Diet



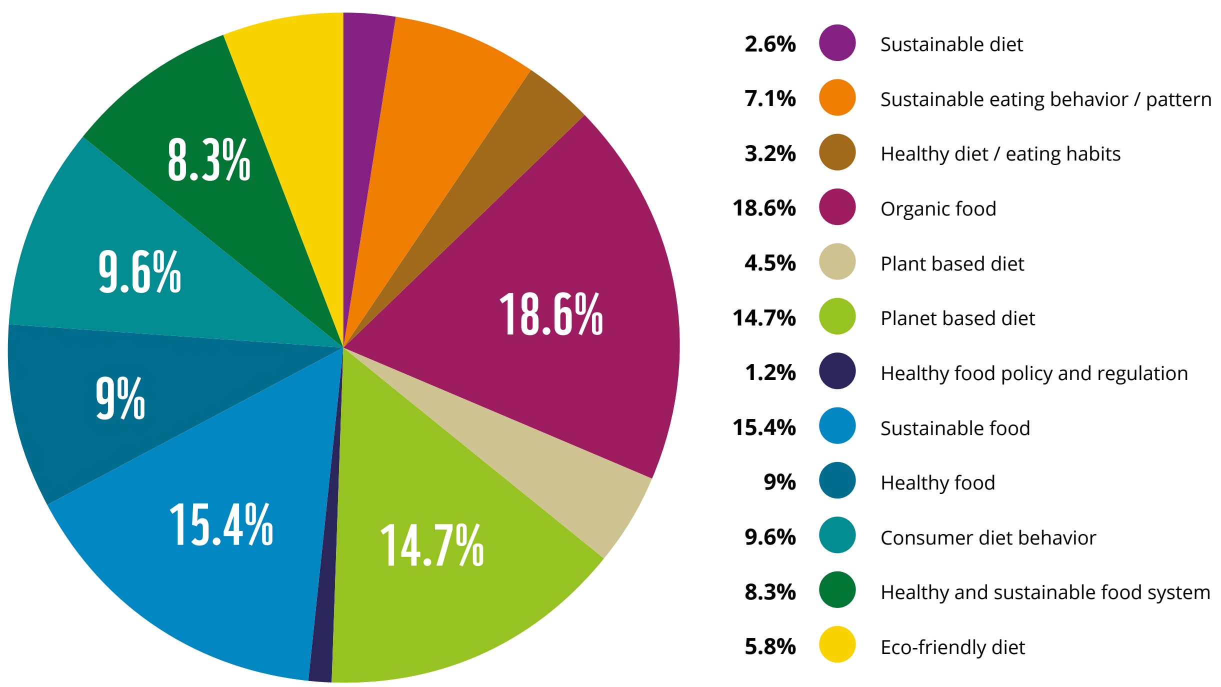
From total 156 Articles, healthy eating habits dominated the news with 29 Articles (18.6%) following with healthy food policy and regulations with 24 articles (15.4%), and a plant-based diet 23 articles (14.7%). Healthy food with 15 articles (9.6%), Sustainability food with 14 articles (9.0%), consumer diet behavior 13 articles (8.3%), sustainable diet 11 articles (7.1%), healthy and sustainable food system 9 articles (5.8%), organic food 7 articles (4.5%), sustainable eating habits 5 articles (3.2%), ecofriendly diet 4 articles (2.6%) and planet-based diet with 2 articles (1.3%).

On the news trends December 2025 have dominated the publications with 22 articles, follow by January 2026 with 21 articles, September 2025 with 20 articles, February 2026 with 16 articles, June 2025 with 14 articles, July 2025 with 13 articles, October 2025 with 12 articles.

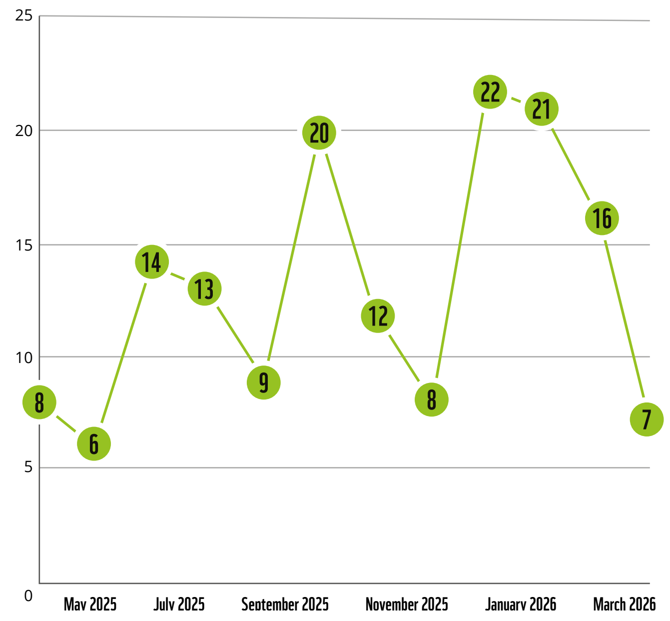
Graphic 8 Topic on Sustainable Diet



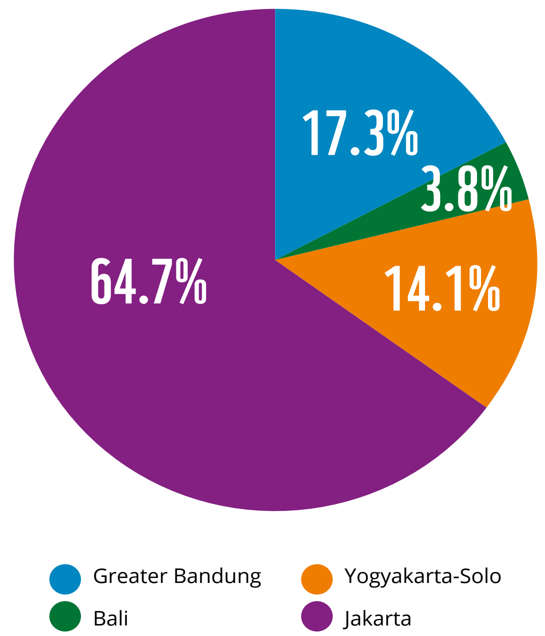
Graphic 9 Percentage on Sustainable Diet



Graphic 10 Number of News per month on Sustainable Diet

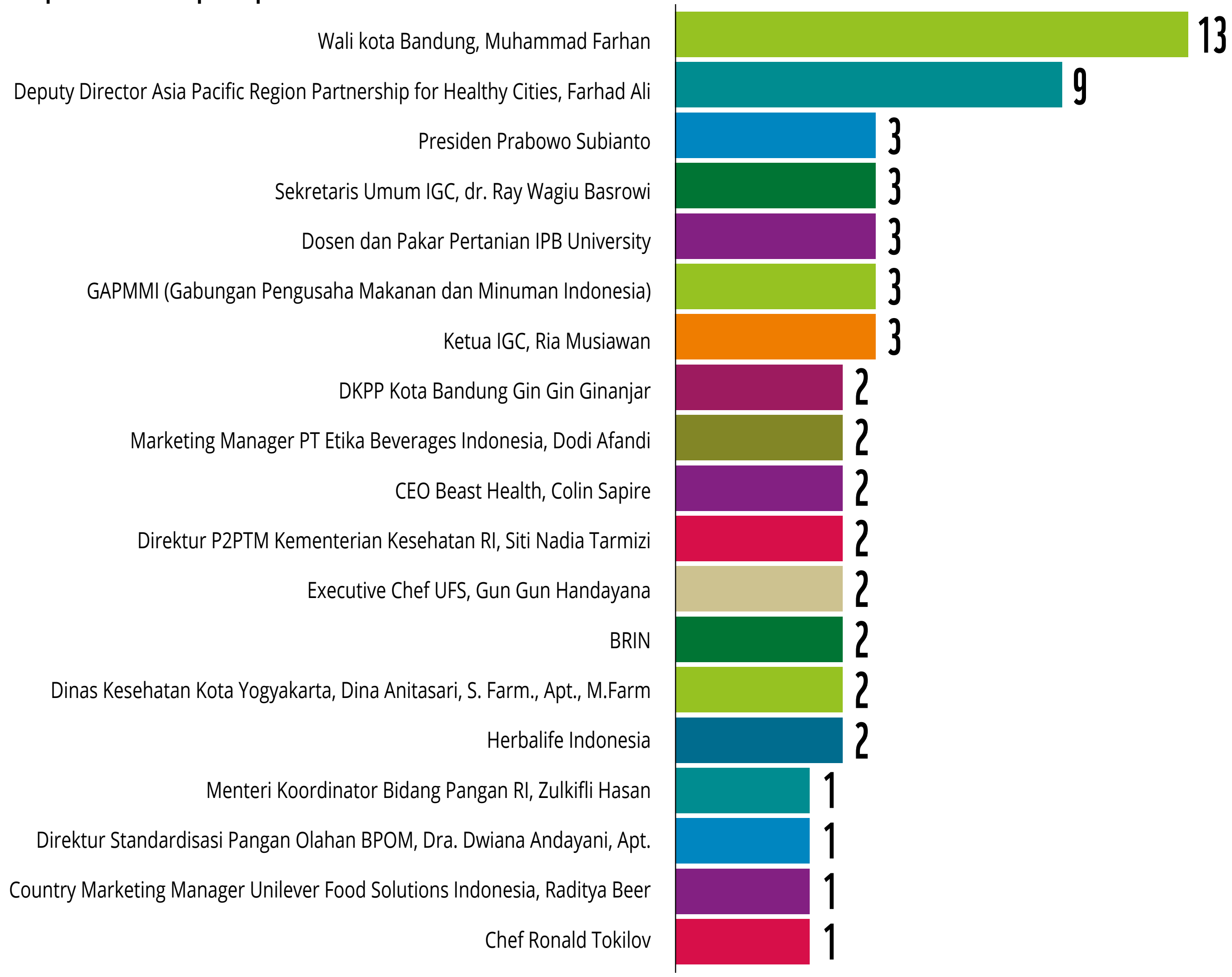


Graphic 11 Areas of Media Coverage

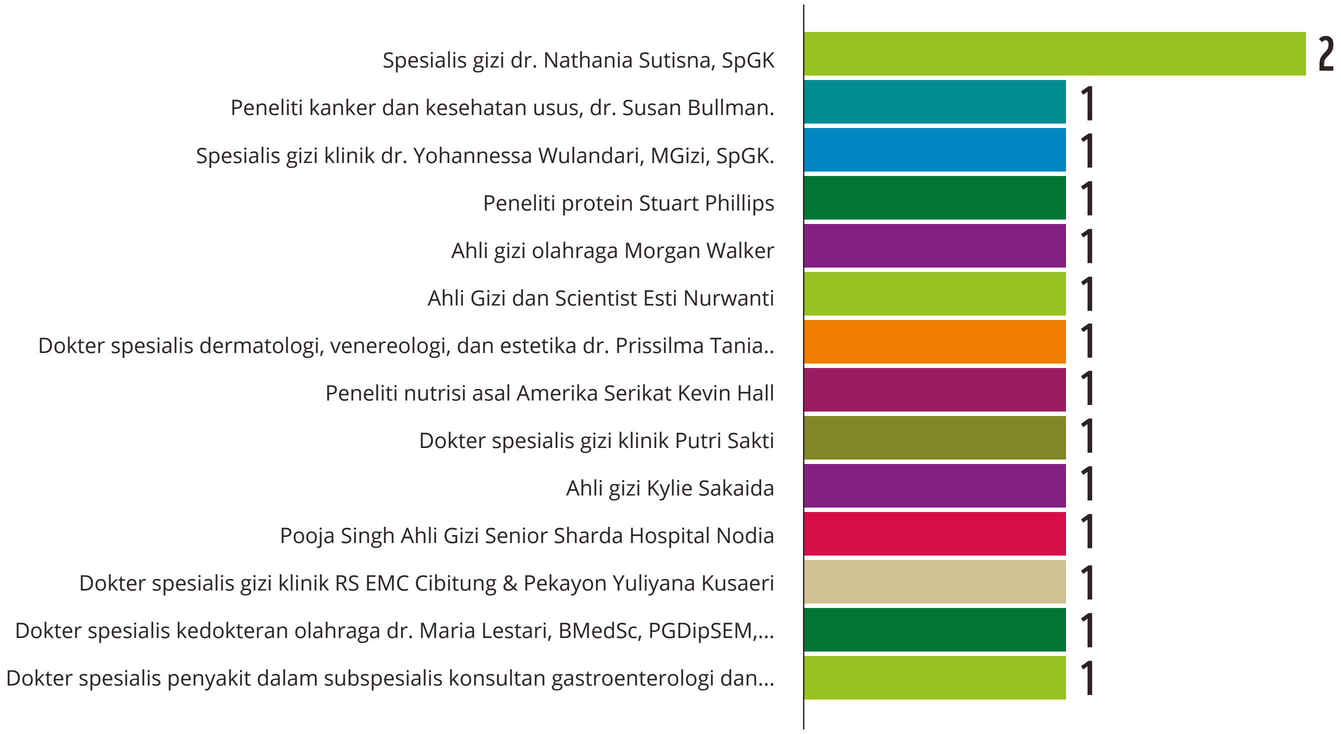


In regard to the spokesperson, the media posted comments from various public personas. The Mayor of Bandung, Muhammad Farhan dominated the coverages with 13 articles, following by Asia Pacific Region Partnership for Healthy Cities, Farhad Ali with 9 articles and President Prabowo Subianto, IGC, GAPMMI with 3 articles while others spokesperson contributes with 1 article. As for Healthcare Professional spokesperson, dr. Nathania Sutisna, SpGK dominated the coverages with 2 articles while others contribute with 1 article.

Graphic 12 Public Spokesperson



Graphic 13 Healthcare Professional Spokesperson



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INTERVIEW AND FGD FINDINGS

This study positions modern retail as a key stakeholder, serving as an important link between consumers, producers, and other relevant stakeholders.

To generate contextual insights into the modern retail and inform the assessment, the study employed qualitative data collection through one-on-one interviews and focus group discussions (FGDs) with selected retailers across four intervention areas: Jakarta, including national-level retailers, Bandung, Bali and Yogyakarta.

Toko Daging Nusantara (supermarket)

Source person: Nanang Siswanto - VP Marketing

Location: Jakarta, Bekasi, Bogor, Tangerang, Karawang, Bandung, Purwokerto, Semarang, Makassar

Summary:

1. Knowledge Gap: Informants acknowledged that the adoption of sustainable diets is hampered by a lack of consumer literacy regarding the concept.
2. Retail as a Market Response: The company positions itself as a consumer-led provider, where changes in healthy product inventory are highly dependent on positive customer response.
3. Efficiency through Small Portions: The strategy of selling small portions is a concrete step for this retailer in supporting sustainability by reducing food waste.
4. Meat is the primary product most sought after by consumers, accounting for more than half of sales. The second-largest category consists of processed products such as nuggets and meatballs, followed by fruit and vegetable products, which make a smaller contribution.

Ranch Market (premium supermarket)

Source person: Ms. Y

Location: Jakarta, Tangerang, Malang

Summary:

Ranch Market sees the future of retail as more than just selling products, but also curating healthier, more transparent, and more sustainable consumption choices. However, the success of the transformation to Healthy & Sustainable Diets remains hampered by three main factors:

1. The consumer education gap.
2. The relatively premium price of sustainable products.
3. The limited supply chain for consistent and certified sustainable products.

Therefore, Ranch Market believes that the transition to a sustainable diet must be achieved through ecosystem collaboration, involving retailers, producers, government, sustainability organizations, the media, and consumers simultaneously. This way, the Planet-Based Diet can evolve from a niche market to a more mainstream consumption pattern in Indonesia.

1. Categories with the largest contributions:
2. Fresh produce & fresh essentials
3. Protein category (meat, poultry, seafood)
4. Dairy & chilled products
5. Snacks & beverages
6. Imported grocery & premium pantry products
7. The categories of plant-based products, organic products, sustainability-focused products are considered still niche.

PT Lion Super Indo (supermarket)

Source persons: Achmad Achyari *(Head of Strategy and Sustainability)* & Fauzi *(Sustainability Lead)*

Location: Jakarta, Bekasi, Tangerang

Summary:

1. The source persons emphasized that although the term Healthy & Sustainable or "Planet-Based Diet" is not used as a marketing label, their retail practices already promote healthy eating through store layout and nutrition education. This strategy is heavily influenced by the lower-middle market segment, which is highly price-sensitive (affordability).
2. Products are displayed starting with vegetables and fruit, then eggs, then frozen products, then finally poultry and seafood at the end. Super Indo categorized their product by their type of food. For example, the frozen category might contain fresh fish with fish balls or nuggets)

Mini M (minimarket)

Source person: Mr. C – Business Support

Location: Bali, Lombok, Makassar

Summary:

1. The source person mentioned the term "Retail is detail" and emphasized that every business decision must reflect the present situation regarding profitability. He also highlighted those large national players ("the red and the blue") actually have a greater capacity to make changes due to their massive economies of scale.
2. Mini M sells a large number of processed foods from its central kitchen to extend their shelf life. The dominant products are unhealthy products like cigarettes, carbonated drinks, snacks, and processed sausages. Protein products like eggs do exist, but their market share is less than 5%.

Pamella (supermarket)

Source person: Himmatun Nafida Noor Afifa - Assistant General Manager

Location: Yogyakarta, Sleman, Gunungkidul

Summary:

1. Local Retail Dilemma: There is a conflict between the desire to support health/environment and the reliance on cheap, long-lasting processed products to maintain profitability and reduce food waste.
2. Social Symbiosis: Pamella's strategy of not selling fresh vegetables to maintain the existence of the surrounding traditional market is a unique form of social sustainability.
3. Educational Barrier: The healthy corner initiative demonstrates that changing store layout alone is insufficient without thorough consumer education and changes in shopping behaviour from the community.
4. Pamella is a retailer that fulfills daily needs, primarily selling processed (packaged) products and products from local Yogyakarta MSMEs. Fresh produce is currently very limited, limited to simple fruits like bananas, melons, and oranges. Vegetables are not yet available. Consumers trust packaged products more due to hygiene and quality factors, which are measured through product analysis. Therefore, approximately 90% of the products sold are processed foods.

Nanakam

Source person: Akbar Maulana – Operations Manager

Location: Bandung

Summary:

1. Nanakam demonstrates a highly adaptive retail model addressing environmental issues through zero-waste management (0.3%) and the elimination of plastic use. Their strategy, which focuses on healthy food and fresh products as the primary economic driver (70% of revenue), aligns with the concept of a planet-based diet, where consumers are shifting from simply purchasing basic goods to choosing food ingredients that support a healthy and sustainable lifestyle.
2. Product Portfolio: Nanakam's merchandise composition is 50% fresh produce and 50% groceries. Non-food products only account for about 10%.
3. Product Sources: Vegetables and fruits are sourced from suppliers, local farmers around Bandung (Lembang, Pangalengan, Majalaya), and traditional markets. Approximately imported products 20-30% of total products are imported, primarily meat (Australia, the US, and New Zealand) and fruit due to their perceived higher quality compared to products from other countries.

FGD Findings

Based on the FGD with Source persons from Borma – Yudi Hartanto, Lotte - Effrilia Ristya, Transmart – Farlian Anwar and Alfamart – Elisa Revira, the main discussion highlighted that economic barriers (price) and supply chain issues (continuity) are the biggest challenges facing retailers in West Java in adopting sustainable diets. Several retailers indicated that they are more likely to respond to established market demand and regulatory developments when introducing healthier products, particularly where commercial risks remain significant and broader ecosystem support is still developing.

Borma (supermarket/ toserba)

Source person: Yudi Hartanto – Head Administration

Location: Bandung City, Bandung Regency, Bandung Barat, Cimahi

Summary:

Focusing on General Merchandise (GMS) and non-perishable products, Borma does not sell vegetables or fruit, as many of its stores lack air conditioning (to keep costs down and prices low).

Lotte (hypermarket & wholesale)

Source person: Effrilia Ristya – Merchandising Fresh Food

Summary:

1. Lotte Grosir Lotte Grosir & Lotte Mart sell frozen imported beef, considering product quality, stock availability, hygiene, competitive pricing, and a longer shelf life. Chicken eggs are sourced from local farmers to minimize distribution costs and maintain freshness.
2. Frozen food sales have increased significantly post-pandemic as consumers (especially working mothers) seek convenience for breakfast or children's lunches.

Transmart (hypermarket)

Source person: Farlian Anwar – Store GM

Location: Jakarta, Bekasi, Depok, Tangerang, Bandung, Semarang, Surabaya, Denpasar, Mataram, and Kupang

Summary:

There's a price-awareness dilemma: eco-friendly or pesticide-free products are always more expensive. For example, hydroponic melons are only sold in high-end stores like TSM Bandung, while in areas like Cimahi or Cirebon, they're not as popular.

Alfamart

Source person: Elisa Revira – Corporate Communication

Location: Alfamart is spread across almost all regions of Indonesia, including the islands of Java, Bali, Lombok, Sumatra, Kalimantan, Sulawesi and the Maluku and Nusa Tenggara islands.

Summary:

As a minimarket, Alfamart does not provide fresh products (fruit/vegetables) -except eggs and rice - due to limited store space.

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GAP ANALYSIS

Terminology Gap:

FAMILIARITY OF CONCEPT HEALTHY SUSTAINABLE DIETS & PLANET-BASED DIETS

a. Retailers' Familiarity of Terms

There is a significant terminological gap, as the term Healthy & Sustainable Diets, "Planet-Based Diet" (PBD) remains nascent and has a minimal footprint in formal academic literature compared to NGO frameworks.

Mainstream retailers tend to avoid using the theoretical term "Planet-Based Diet" because it is considered too complex for their consumers, viewing it instead through practical lenses.

Super Indo:

"Simply put, it is consumption consciousness. We know what we eat and where it comes from."

Toko Daging Nusantara:

"At a glance, I understand it as everything that grows on the planet, maybe like plants or food derived from plants."

Pamella Supermarket:

"Honestly, I just heard this term, but after it was explained, I understand it as a wiser daily consumption pattern, not excessive, and using fresh food ingredients..."

Conversely, premium retailers possess a comprehensive and sophisticated understanding of the concept.

Ranch Market:

"Yes, we know the Planet-Based Diets concept as an approach to consumption patterns that encourages a balance between human health and environmental sustainability."

b. Public's Familiarity of Healthy Sustainable Diets & Planet-Based Diets

The concept of the "Planet-Based Diet", as spearheaded by the World Wildlife Fund (WWF), remains relatively novel across both public domains and academic discourses. To contextualize the current standing of this terminology, it is essential to evaluate its presence alongside other established sustainable food paradigms within academic literature databases, such as Scopus. The first paradigm, the "Sustainable Diet", serves as the dominant macro-academic umbrella with steady, long-term growth. This is evidenced by its trajectory in publication volume, rising from a single document in 1995 and 46 in 2016 to 583 documents by 2025. The second paradigm, the "Planetary Health Diet", introduced by the EAT-Lancet Commission in 2019 , represents a major scientific breakthrough. Driven by high-profile scientific backing, PHD experienced rapid momentum, surging from just two documents in 2019 to 124 by 2025. In contrast, the "Planet-Based Diet" exhibits a significant academic-action gap. Originating primarily as an NGO advocacy and market action framework, PBD maintains a virtually non-existent scholarly footprint, with a cumulative total of only two documents recorded by 2026. This stark disparity underscores a profound disconnect between market-oriented advocacy and formal scientific validation.

This scarcity of scientific literature directly correlates with widespread ambiguity among the general public and retail actors alike. When introduced to the term "Planet-Based Diet," consumers and retailers frequently conflate it with the phonetically and conceptually similar "Plant-Based Diet." This phonetic overlap engenders a common misconception that a Planet-Based Diet necessitates strict vegetarianism or veganism. However, the WWF framework of Planet-Based Diet aim to deliver benefits for both human health and the environment by promoting nutritious food choices with lower environmental impacts. WWF recognizes that there is no single diet suitable for all contexts; rather, Planet-Based Diets are shaped by local food systems, cultures, and nutritional needs, while contributing to a transition toward a food system that supports both people and nature.

RETAILERS' CURRENT CONDITION

a. Product Curation and Current Display Strategies

Most Indonesian retailers do not utilize a product- or ingredient-level approach to separate these items, but instead drive their display strategies by broad categorization, temperature requirements, and consumer shopping habits.

Category-Driven Mixing: Retailers like Super Indo said that category management dictates placement; for example, a frozen display section will contain products, such as tuna, directly alongside process items like fish balls or nuggets. Similarly, Ranch Market organizes its aisles based on lifestyle needs and shopping missions, seamlessly mixing organic vegetables with ready-to-eat options (salad bowls, plant-based meats) within the same curated section.

Proportional Realities and Bulk Displays: Nanakam Fresh Market maintains a clear and transparent proportion, with its merchandise split evenly between 50% fresh produce and 50% daily groceries. To minimize packaging, Nanakam displays foods using an open, bulk system. Toko Daging Nusantara organizes its store layout using separate planograms mainly to prevent cross-contamination, rather than distinguishing between fresh and minimally processed foods and processed foods. Fresh meat products account for more than half of total sales, followed by processed meat products, while fruit and vegetable products make up a smaller share.

The Processed Food Skew: Regional and convenience retailers tend to sell mostly processed and packaged foods. At Pamella Supermarket, around 90% of products are processed or packaged. A previous attempt to create a "Healthy Corner" that grouped different types of healthier products together was not effective because it confused consumers. This product mix is largely influenced by infrastructure limitations. Retailers such as Mini M, Alfamart, and Borma rely more on fast-moving processed foods because fresh products have a shorter shelf life and require refrigeration or temperature-controlled storage, which may be costly or difficult to provide in smaller store formats.

For other retailers, since they did not provide specific, quantifiable percentage breakdowns of their food categories during the interviews or FGDs, a summary of each is as follows.

- **Ranch Market:** ranked their top-selling categories—with fresh produce and protein at the top—but did not provide the actual percentage splits.
- **Super Indo:** stated a strategic goal to make fresh product sales higher than total other store sales but did not share their current quantitative data.
- **Lotte Grosir:** stated that sales are dominated by food products—comprising both staple foods and fresh produce—but did not specify the composition breakdown.
- **Alfamart and Borma:** qualitatively stated they do not sell fresh vegetables or fruits due to space and cooling limitations but did not give the exact percentage of processed foods making up their total inventory.
- **Mini M:** mentioned protein like eggs makes up less than 5% of sales and that processed, fast-moving foods dominate, but they did not provide a full inventory breakdown

(note: a separate follow up can be done as approaching for partnership)

b. Retail Practices: Integrating Healthy and Eco-Friendly Initiatives

Based on the interviews and focus group discussion, the efforts in integrating healthy and eco-friendly initiatives can be summarized into several points:

Retailers actively encourage healthier choices through deliberate store layouts and product curation.

Super Indo:

"...when consumers enter a Super Indo outlet, the first thing presented is the healthy product category, namely fresh fruit and vegetables, and then other products."

Toko Daging Nusantara:

"We have separate planograms for fresh meat, frozen meat, chicken, vegetables, and fruit areas. The goal is for consumers to easily find items and most importantly to prevent cross-contamination..."

Retailers are implementing environmentally friendly policies to reduce plastic and food waste.

Nanakam Fresh Market:

"The use of the bulk system aims to minimize plastic waste and styrofoam trays usually used in packaged products."

Pamella Supermarket:

"Pamella has implemented paid plastics to encourage the use of personal shopping bags, and provides specific recycling bins..."

Lotte Grosir & Mart:

"In compliance with Bandung City regulations, the use of styrofoam for packaging fresh products has been banned and replaced with clear plastic (mica) packaging, even though the cost is higher."

"Lotte also limits the use of rollback plastic (fruit/meat plastic) by providing tongs/scoops for bulk products so consumers' hands do not get dirty and they do not need to use plastic as gloves.

Borma Group:

"Borma only started implementing paid plastic on May 4, 2026, because it was caused by a spike in plastic production costs (up to 60%) from Rp300 to Rp800 per piece.

Premium retailers are integrating certified sustainable items into their daily offerings.

Ranch Market:

"Support for products with sustainability certification, including PINISEA, Ranch Market's private label tuna which has MSC (Marine Stewardship Council) certification.

Lotte Grosir & Mart:

Chicken eggs are supplied by local farmers to cut distribution costs and maintain freshness.

c. Retailers' Challenges Towards Healthy & Sustainable Diets

Shifting for Healthy & Sustainable Diets in Indonesia presents significant structural challenges for retailers operating in a market-driven environment. As commercial entities, retailers cannot drive this transition in isolation; their operational decisions are tightly bound to supply chain realities and consumer demand. Consequently, retail adoption faces a double-edged barrier: severe operational and financial constraints within the market ecosystem (Subsection 4.1), alongside a persistent consumer education gap that limits active demand for sustainable products (Subsection 4.2).

d. Operational Realities and the Cost of Sustainability

Indonesian consumers, particularly those in the lower-middle income segment, are highly price-sensitive and tend to prefer more practical and affordable options. This creates an affordability challenge for healthier food choices.

Super Indo:

"The challenge is market segmentation. Super Indo's target market is middle to lower, so we must consider the affordability of protein sources..."

Pamella Supermarket:

"Massive implementation of a healthy & sustainable diet is very difficult because retail moves following consumer behavior. If society's behavior has not changed, it is hard for retail to move maximally."

Lotte Grosir & Mart:

"There was a significant increase in frozen food sales because consumers (especially working mothers) look for practicality for breakfast or children's lunches."

Infrastructure, logistics, and the short shelf life of fresh produce pose heavy operational burdens. For some, highlight the infrastructure and space constraints for convenience retailers.

Mini M:

"As a retail business, we need speed and conversion accuracy to generate profit margins. Healthy fresh products usually have a short shelf life, and this creates a friction of interest with business reality."

Alfamart:

"As a minimarket, Alfamart does not provide fresh products (fruit/vegetables) except eggs and rice due to limited store space."

Independent green initiatives carry high financial risks when the broader market ecosystem is unready.

Transmart:

Highlighting the financial risk of independent green initiatives and consumer price sensitivity

"In 2012 in Jogja, Transmart tried to declare the first retail store without plastic, but revenue dropped because consumers moved to retailers that still provided free plastic."

"Eco-friendly or pesticide-free products are always more expensive. Farlian gave the example of hydroponic melons costing Rp35,000/kg (compared to regular melons at Rp15,000/kg) which only sell in high-end outlets like Transmart Bandung, while in areas like Cimahi or Cirebon these products do not sell."

e. The Consumer Information & Knowledge Gap

Beyond economic and logistical hurdles, a profound lack of consumer understanding regarding sustainability and healthy eating presents a major barrier for retailers attempting to transition toward Healthier & Sustainable Diets, because retailers operate as consumer-led businesses, the absence of public knowledge regarding healthy & sustainable diets translates directly into a lack of market demand, making green initiatives highly risky. These challenges are recapped as follows:

Conceptual Confusion: Toko Daging Nusantara noted that the adoption of sustainable diets is actively hindered because consumers lack conceptual literacy regarding the topic, resulting in no specific demand for these products. Similarly, Ranch Market identified a significant understanding gap at the consumer level when it comes to distinguishing between terms like sustainability, healthy diets, organic, plant-based, and eco-friendly.

The Risk of Complex Terminology: Communicating the value of sustainable products is a challenge in itself. Super Indo highlighted that their primary hurdle is making healthy products accessible and understood by consumers without relying on complex, alienating language such as "sustainability" or "planet-based".

Behavioral Resistance to Store Changes: Pamella Supermarket demonstrated that changing the physical store layout is insufficient without mature consumer education. When the retailer attempted to group nutritious items into a dedicated "Healthy Corner," the initiative failed because consumers became confused, preferring to shop according to traditional product categories rather than lifestyle labels.

The Need for Broader Education: Ranch Market concluded that the comprehensive implementation of Healthy & Sustainable Diets cannot proceed effectively without much broader, widespread consumer education to support these changes.

GREEN ADAPTATION DILEMMA BY RETAILER

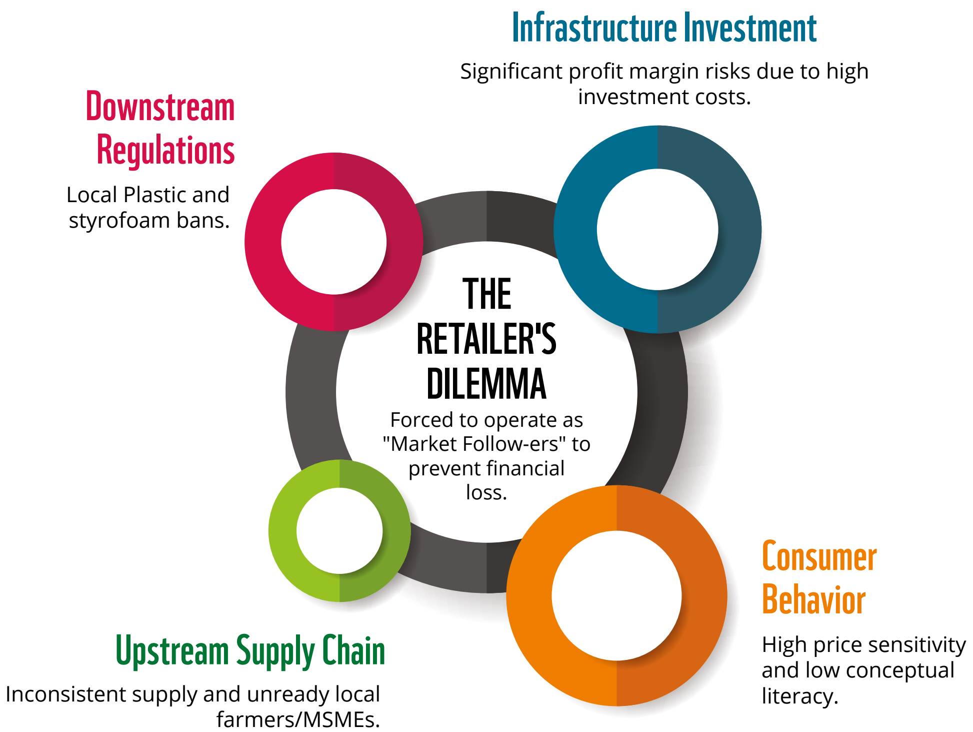
The Indonesian retail sector currently faces a profound "Green Adaptation Dilemma" when it comes to implementing Healthy & Sustainable Diets.

Retailers find themselves squeezed between increasing downstream pressures—such as local government plastic ban and shifting post-pandemic consumer demands for both health and convenience—and an upstream supply chain that remains largely unprepared.

While premium retailers have successfully carved out niche markets for organic and sustainability-certified products, mainstream and regional retailers are heavily constrained by the severe price sensitivity of the lower-middle-income demographic. Furthermore, high logistical costs, such as the expensive refrigeration required for fresh produce, and an inconsistent supply of locally sourced products, the higher costs associated with sustainable goods may lead some retailers to prioritize commercial viability and affordability when considering new sustainability initiatives.

Consequently, among the retailers consulted operate as "market followers," adopting sustainable practices only when mandated by regulation or when direct cost efficiencies are achieved.

Graphic 14 The Green Adaptation Dilemma



Purpose: To visually explain the factors that may limit retailers' ability to take an early lead on sustainability initiatives.

RECOMMENDATION

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1. Improving Public Understanding of Healthy and Sustainable Diets

Addressing this terminological gap and the resulting public ambiguity requires a bifurcated, strategic approach tailored to specific target audiences:

a. Academic Domain: An Explicit Strategy

Within academic and research institutions, the term "Planet-Based Diet" should be explicitly promoted and investigated. Researchers and scholars must be encouraged to conduct empirical studies, clinical evaluations, and socio-economic assessments using this specific terminology. Elevating the volume of peer-reviewed publications will bridge the current data gap in international databases, thereby providing a robust theoretical foundation and policy legitimacy for future interventions.

b. Retail and Consumer Domain: An Implicit Strategy

Within the commercial retail environment, the Healthy & Sustainable Diets approach may be more effectively communicated through a seamless, context-sensitive approach, rather than relying on the explicit use of the term itself. The focus should be on translating the framework's underlying principles into practical and locally relevant retail strategies, embedded naturally within existing operational, merchandising, and marketing mechanisms:

Translating WWF principles into in-store actions allows retailers to expand plant-protein visibility, feature seasonal local produce, and offer discounts on "imperfect" foods to directly minimize food waste.

Applying choice placement and nudging means making healthier and more sustainable products easier to notice and choose. Instead of placing them in a separate "Healthy & Sustainable Diets" shelf, retailers can place them next to similar conventional products. For example, plant-based milk can be displayed next to dairy milk, supported by simple labels that highlight clear benefits such as freshness, health, or lower environmental impact.

Shift marketing communications from focusing primarily on planetary or environmental messages, and instead pivot toward consumer-centric values by highlighting health, taste, freshness, and affordability.

NGOs and academic institutions should supply retail category managers with practical, impact-based sourcing guidelines, enabling procurement teams to automatically curate environmentally responsible inventories without burdening consumers with complex scientific terminology.

2. Strengthening Ecosystem Collaboration for Healthy & Sustainable Diets

The successful transition to a sustainable diet requires comprehensive ecosystem collaboration involving retailers, producers, government, NGOs, and the media.

Ranch Market: "We believe the transformation toward a more sustainable food system cannot be done alone by retailers but rather requires ecosystem collaboration."

NGOs like WWF must ensure their advocacy and frameworks are practical and aligned with retail realities.

Super Indo: "Super Indo is very open to cooperation with organizations like WWF, but the approach must be grounded to the retail world so healthy products remain affordable and easy to understand."

The government needs to provide concrete upstream interventions, including regulatory support and incentives.

M Mart: "Clear regulation and synergy between the government and business players are needed. The government needs to be present to regulate the ecosystem, so business competition becomes healthier..."

Expecting retailers to drive this transition independently is unfeasible. Success depends on building a collaborative ecosystem where government bodies, producers, and NGOs like WWF share the burden of consumer education, supply chain capacity building, and regulatory support. By anchoring this ecosystem in WWF's **"Beli yang Baik"** framework, market stakeholders can reframe sustainability around direct personal health and financial benefits—ultimately turning sustainable diets into an accessible, everyday standard for the broader Indonesian public.

To operationalize this collaborative ecosystem and resolve the "Green Adaptation Dilemma," strategic action must focus on three interconnected pillars. First, a comprehensive nationwide consumer survey should be conducted to map purchase drivers and willingness-to-pay across demographic segments, particularly within lower-middle-income groups. This empirical intelligence will provide mainstream retailers with clear baseline data to align pricing and inventory strategies with real market demands while measuring public familiarity with the **"Beli yang Baik"** principles.

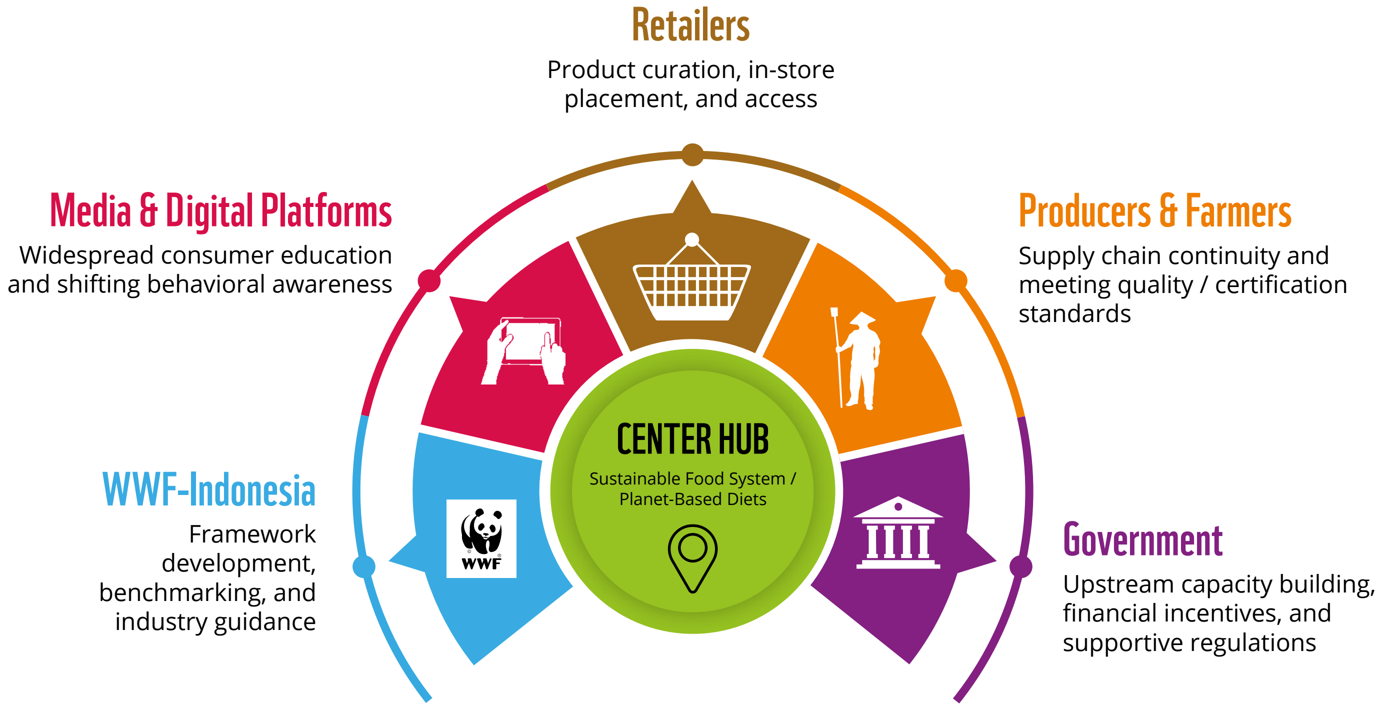
Second, work together with the conventional advocators, which is the media. In addition to liputan 6 and Kompas.com, approaching new media such as IDN-Times Yummy and GNFI would leverage visibility, especially with the young readers.

Third, NGOs, government bodies, and retail associations must launch a unified consumer campaign like **"Sehat kita, sehat bumi"** tagline. Rather than pushing complex dietary jargon, the campaign should translate WWF's **"Beli yang Baik"** framework into intuitive in-store cues by promoting conscious consumption (*Perlu*), highlighting seasonal, minimally processed local produce (*Lokal & Alami*), educating shoppers on proper food storage to actively reduce waste (*Awet*), and simplifying green shelf-labeling for certified sustainable goods (*Ecolabel*).

Finally, enhancing retailer readiness requires derisking the transition through targeted institutional support. Academic institutions and NGOs should equip retail category managers with standardized, impact-based guidelines to streamline the sourcing of sustainable local goods. Concurrently, local governments must provide infrastructure subsidies—particularly for cold-chain logistics—and regulatory incentives to lower operational overheads, enabling mainstream retailers to adopt subtle choice architecture (*nudging*) and position eco-friendly choices directly alongside conventional products.

Graphic 15 The Ecosystem Collaboration Model (Hub-and-Spoke)

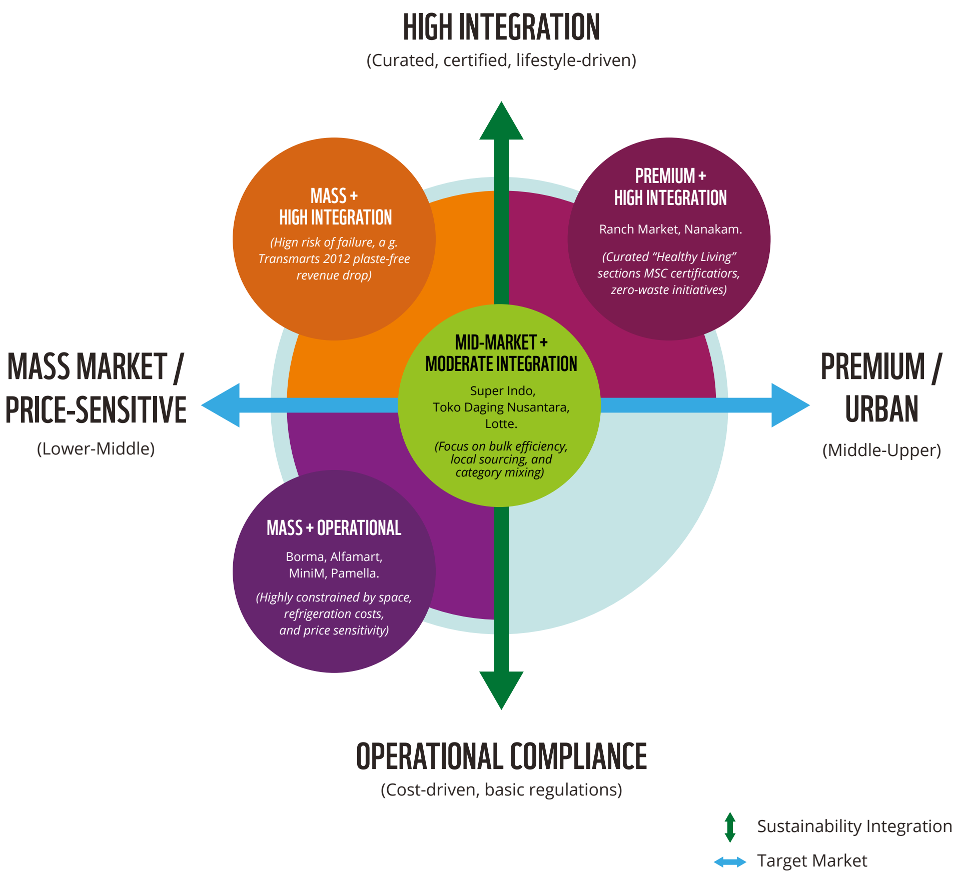
Purpose: To illustrate the final recommendation that retailers cannot shift the market alone.



3. Way Forward: Potential Strategic Retailers for WWF Intervention on Healthy & Sustainable Diets and Sustainability

While establishing a collaborative ecosystem is essential for long-term systemic change, WWF must also adopt a pragmatic, immediate approach to retailer engagement. A one-size-fits-all strategy will be ineffective given the vast differences in retail infrastructure, target demographics, and core business models across Indonesia. To maximize the impact of its interventions, WWF could implement a tiered follow up engagement strategy. This approach prioritizes direct partnerships with retailers demonstrating high market readiness and structural capacity, while applying specialized advocacy and alternative support for those heavily constrained by their operational realities.

Graphic 16 Retailer Strategy Matrix



Tier 1: Primary Strategic Partners (High Readiness & High Impact)

WWF could direct its immediate collaborative and engagement efforts toward retailers that already possess the infrastructure for fresh foods and have explicitly expressed an openness to ecosystem collaboration.

Ranch Market:

As a premium retail player, Ranch Market shows strong potential for further engagement in healthier and more sustainable diets. The retailer already features initiatives such as MSC-certified seafood, free-range eggs, and dedicated "Healthy Living" sections, which may provide practical entry points for collaboration. Ranch Market also acknowledged WWF's initiative and highlighted the importance of cross-sector collaboration in advancing sustainable diets—an area where WWF could play a convening and facilitation role.

Lotte Grosir & Lotte Mart:

Lotte Grosir & Lotte Mart (Potential B2B and B2C Engagement Platform): Lotte's presence across both wholesale and supermarket formats may provide opportunities to explore engagement with different customer segments. Existing initiatives, such as reducing the use of styrofoam and plastics for selected products and sourcing eggs from local farmers, indicate relevant operational practices that could serve as potential entry points for further collaboration. WWF could explore how the two formats may support complementary approaches—engaging end-consumers through Lotte Mart while also examining opportunities to encourage more sustainable procurement practices among smaller food businesses and HORECA customers through Lotte Grosir.

Super Indo:

This retailer represents the most significant opportunity for mass-market impact. They have already operationalized health interventions by placing fresh produce at the front of their stores and utilizing sugar meters on shelves. Their leadership explicitly stated they are highly open to partnering with WWF, provided the approach remains grounded and practical for price-sensitive consumers.

Tier 2: The Pilot Model (High Readiness, Niche Scale)

Nanakam Fresh Market:

While smaller in scale, Nanakam appears to have relatively high potential for follow-up engagement with WWF-Indonesia. Existing practices, including a near-zero waste margin of 0.3%, plastic-free bulk displays, and a product assortment with around 50% fresh produce, may offer useful entry points for collaboration on healthier and more sustainable diets. Further engagement could help explore practical approaches and generate insights that may inform future collaboration with other retailers.

Transmart (The Location-Specific Partner):

Transmart's historical data proves that mass-market sustainability initiatives carry high financial risk; a 2012 plastic ban attempt resulted in lost revenue, and premium eco-products (like hydroponic melons) fail in its regional stores. Therefore, WWF could consider a location-specific engagement approach with Transmart, prioritizing selected premium outlets such as TSM Bandung where consumer profiles and purchasing power may provide a more conducive environment for piloting healthier and more sustainable product initiatives. This targeted approach could help assess the feasibility and consumer response before considering broader engagement across other Transmart locations.

Tier 3: Specialized Transition Target (High Volume, Specific Focus)

Toko Daging Nusantara:

Given its meat-focused business model, engagement may require a tailored approach that reflects its specific market context and product portfolio. Existing practices, including local sourcing of chicken, fish, eggs, and vegetables, as well as smaller portion offerings to help reduce household food waste, may provide useful entry points for collaboration. WWF could explore these areas further as part of broader engagement on responsible sourcing, food waste reduction, and healthier and more sustainable diets.

Tier 4: Longer-Term Engagement Opportunities (Low Readiness, High Constraint)

Retailers in this group may benefit from a more tailored and gradual engagement approach, reflecting their operational realities and market constraints. Rather than focusing immediately on major changes to product assortment, WWF could explore practical entry points that are more closely aligned with their current business context, while also addressing broader enabling conditions. **Convenience and Regional Retailers (Mini M, Alfamart, Borma, Pamella):** These retailers face severe structural limitations regarding store space, a lack of expensive cooling infrastructure, and extreme consumer price sensitivity. WWF could explore relevant entry points such as sustainable packaging, food waste reduction, consumer communication, selected product initiatives, and collaboration with government or other partners to strengthen enabling infrastructure. Over time, these efforts could help create more opportunities for engagement on healthier and more sustainable diets.

Potential Next Phase: Towards the WWF Retailer Methodology

The tiered engagement approach can serve as an initial guide for identifying follow-up actions related to Healthy and Sustainable Diets. Retailers that demonstrate sufficient interest, willingness, and capacity could then be invited to a more structured technical phase using the WWF Retailer Methodology.

The WWF Retailer Methodology is a step-by-step framework that helps retailers measure and report food product sales, strengthen data collection and reporting, establish a baseline, and identify practical targets and opportunities for transitioning toward healthier and more sustainable diets.

The methodology has not yet been technically applied through this study, which focuses on understanding the retail landscape, market context, barriers, and readiness for further engagement. In potential next phase, WWF could work directly with interested and priority retailers to assess available data and systems, define the assessment scope, establish a baseline, and develop practical pathways for transitions.

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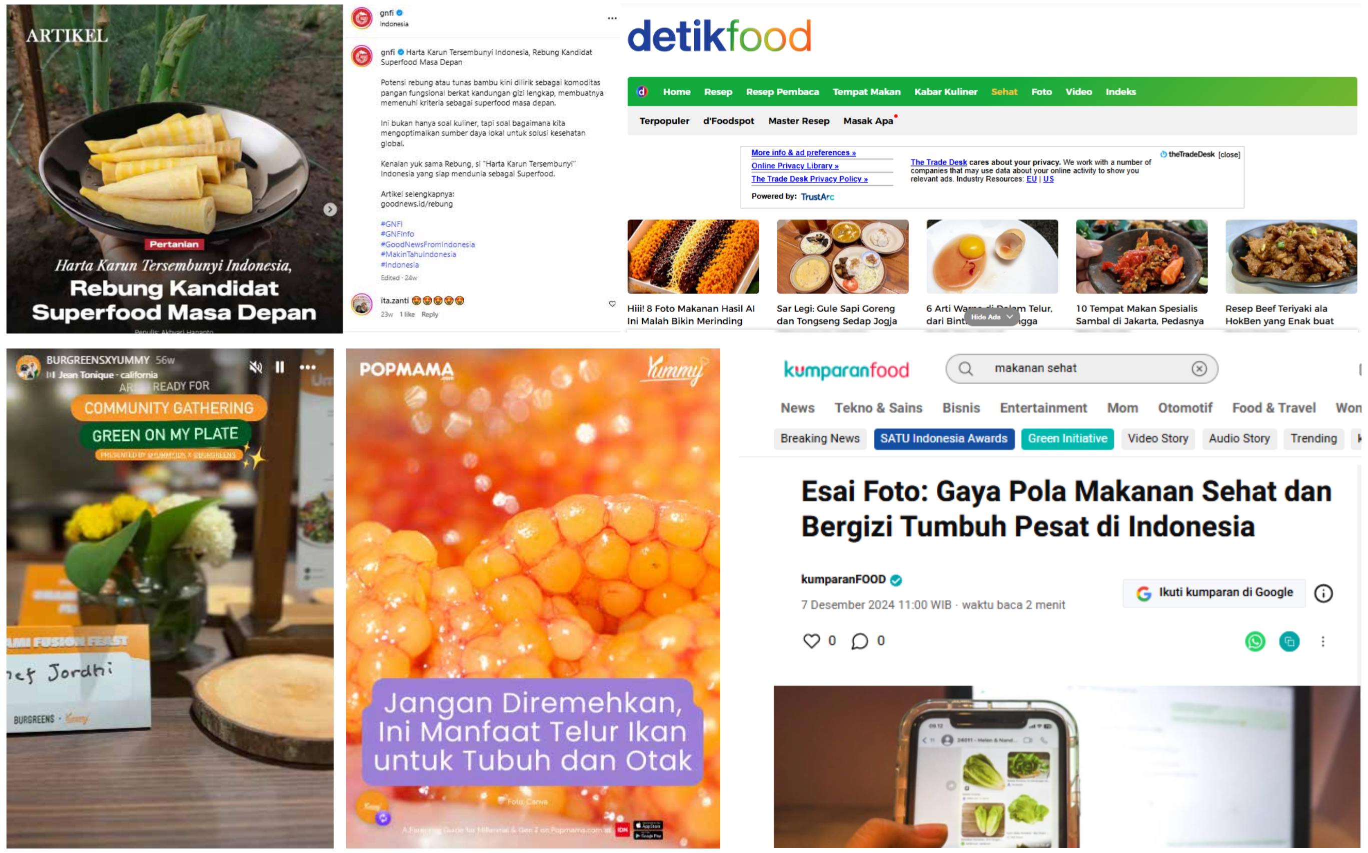
APPENDIX

Media Special Section



The top list spokesperson contributes in Articles from April 2025 to March 2026

Muhammad Farhan
Mayor of Bandung

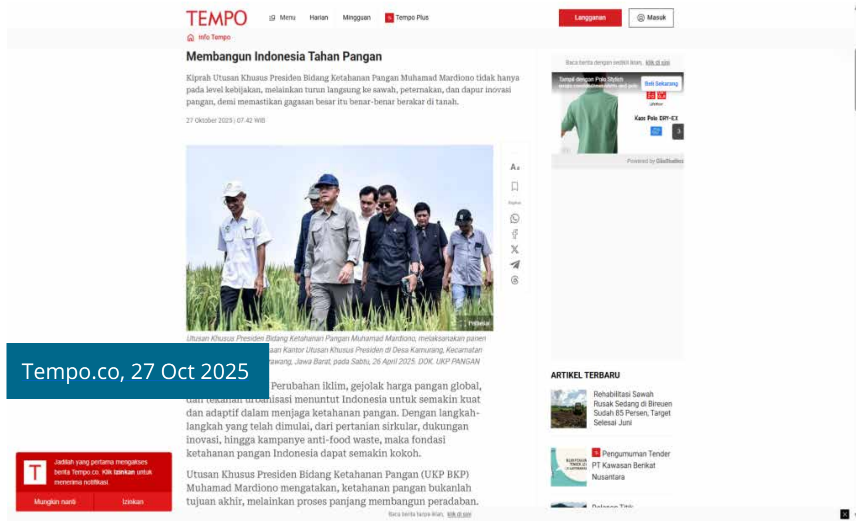
Farhad Ali
Deputy Director APRP for Healthy Cities

dr. Ray Wagiu Basrowi

dr. Nathania Sutisna, SpGk
Nutrition Specialist

Top Coverages

Katadata.co.id, 8 Jul 2025



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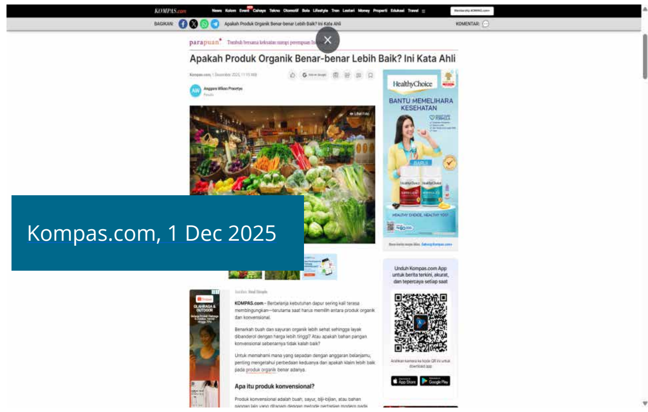

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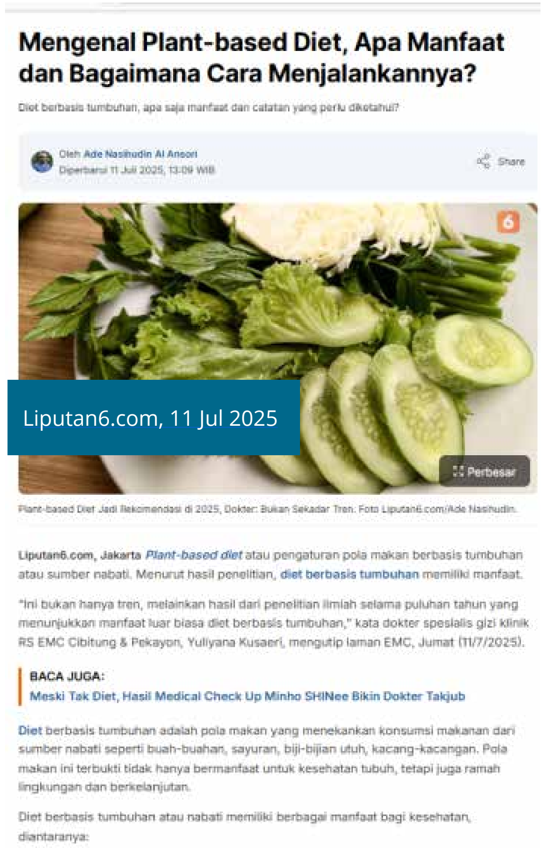

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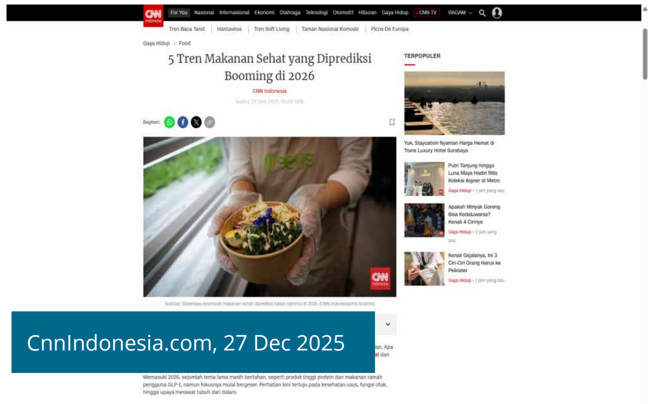

CnnIndonesia.com, 27 Dec 2025

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GLOSSARY

1. Healthy & Sustainable Diet (SD)

Definition: The dominant macro-academic paradigm and umbrella term used in sustainable nutrition literature to describe dietary patterns that promote human health and well-being while exerting low pressure on the environment.

Key Context: SD has a long-term academic foundation with steady, exponential research growth, with publications increasing from 1 in 1995 and 46 in 2016 to 583 documents by 2025.

2. Planetary Health Diet (PHD)

Definition: A scientifically defined, optimal diet designed to feed the global population healthily within planetary boundaries, introduced by the EAT-Lancet Commission in 2019.

Key Context: PHD represents a major scientific breakthrough that has experienced rapid momentum in academic literature (growing from 2 documents in 2019 to 124 by 2025). It serves as a scientific foundation for sustainable dietary policies worldwide, though it is often conflated by the public with PBD or plant-based diets.

3. Planet-Based Diet (PBD)

Definition: Dietary patterns promoted by WWF that aim to deliver benefits for both human health and the environment by encouraging nutritious food choices with lower environmental impacts. WWF recognizes that there is no single diet suitable for all contexts; rather, Planet-Based Diets are shaped by local food systems, cultures, and nutritional needs, while contributing to a transition toward a food system that supports both people and nature.

Key Context: Unlike strict vegetarianism or veganism, PBD does not mandate the absolute elimination of animal products. Instead, it emphasizes plant-rich eating, local and seasonal sourcing, minimally processed ingredients, and halving food loss and waste. In this context of study, the terms are currently a nascent term in academic literature (with only two recorded Scopus publications by 2026), making it primarily an NGO-driven market-action framework.)

4. The "Green Adaptation Dilemma"

Definition: The structural and economic conflict faced by modern food retailers who find themselves caught between strict consumer-facing downstream regulations (such as plastic bans) and an unprepared upstream supply chain.

Key Context: Mainstream retailers operating under this dilemma face high business risks and thin profit margins due to high logistical costs (e.g., cooling infrastructure), short fresh food shelf life, and extreme consumer price sensitivity. This limit their ability to take an early lead on sustainability initiatives.

5. Market Followers

Definition: Retailers that do not act as environmental pioneers but instead adopt green or sustainable initiatives primarily when forced by regulations or when direct internal cost efficiencies are achieved.

Key Context: indicated in Indonesia context, based on several participating retailers on this study, they operate as market followers due to the high financial risk of pioneering sustainable products without the support of a mature, collaborative market ecosystem.

6. Choice Architecture (Nudging)

Definition: The practice of organizing the physical or digital retail environment to subtly influence consumer choices toward healthier and more sustainable options without restricting their freedom of choice or altering economic incentives.

Key Context: Examples of nudging in food retail include placing plant-based milk directly next to conventional dairy milk (rather than isolating it in a special aisle) and utilizing clear, benefit-driven labels such as *"Fresh & Low-Emission Choice"*.

7. Upstream vs. Downstream

Definition:

Upstream: The supply-side of the food value chain, including agricultural producers, local farmers, suppliers, and distributors who bring raw food materials to market.

Downstream: The demand-side and consumer-facing end of the value chain, involving retail operations, consumer shopping habits, and government regulations targeting retailers or end-consumers.

Key Context: Retailers are positioned as the bridge between upstream producers and downstream consumers. Systemic food system transformation requires synchronized interventions at both the upstream level (capacity-building for farmers) and the downstream level (choice architecture for consumers).

8. "Beli yang Baik" Framework

Definition: A consumer-facing advocacy framework established by WWF-Indonesia that promotes conscious consumption.

Key Context: The framework translates complex sustainability concepts into four intuitive, actionable in-store consumer cues:

Perlu (evaluating necessity to avoid overconsumption).

Lokal & Alami (prioritizing local, seasonal, and minimally processed foods).

Awet (educating consumers on proper storage to actively minimize food waste).

Ecolabel (guiding consumers to choose certified eco-friendly or sustainable goods).

9. "Sehat kita, sehat bumi"

Definition: The overarching promotional campaign tagline (meaning "Our Health, Earth's Health") co-promoted by NGOs, government bodies, and retail associations.

Key Context: The campaign is designed to shift marketing communications away from abstract planet-centric terminology toward direct consumer-centric values, highlighting personal health, taste, freshness, and affordability.

10. MSMEs (Micro, Small, and Medium Enterprises)

Definition: Small-scale local businesses (referred to in Indonesia as *UMKM - Usaha Mikro, Kecil, dan Menengah*) that operate independently, often supplying localized culinary and traditional food products .

Key Context: Regional supermarkets, such as Pamela in Yogyakarta, rely heavily on local MSMEs to stock up to 90% of their processed and packaged inventory, representing a key form of social sustainability and regional economic support.

11. (Marine Stewardship Council) Certification

Definition: An international, science-based standard and certification program for wild-caught, sustainable seafood.

Key Context: Premium retailers such as Ranch Market are introducing MSC-certified products into their everyday assortments—such as the private-label PINISEA tuna line—to demonstrate their environmental responsibility to consumers.

12. WWF Retailer Methodology

Definition: Step-by-step framework created by WWF for retailers to measure and report their food product sales, progressively enhancing their data collection and reporting capabilities to support a transition to more sustainable and healthy diets.

Key Context: In this study, the WWF Retailer Methodology has not yet been technically applied to participating retailers. The current study focuses on understanding the retail landscape, market conditions, barriers, and potential readiness for engagement. The methodology could be introduced in a subsequent phase with interested retailers to establish a more detailed baseline and identify practical opportunities for transition.

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