



Euromonitor  
International

# Asian Speciality Drinks in Indonesia

December 2024

Table of Contents

## KEY DATA FINDINGS

### 2024 DEVELOPMENTS

Positive growth for Asian speciality drinks, driven by affordability, promotions, and consumer familiarity  
Okky Jelly Drink regains market share with strategic pricing, flavour innovation, and engaging promotions  
Cooling water products see stable performance despite limited innovations

### PROSPECTS AND OPPORTUNITIES

Positive, albeit slowing growth expected amid maturity and rising competition  
E-commerce will drive growth  
Distribution will remain limited across foodservice channels

### CATEGORY DATA

Table 1 - Off-trade Sales of Asian Speciality Drinks: Volume 2019-2024  
Table 2 - Off-trade Sales of Asian Speciality Drinks: Value 2019-2024  
Table 3 - Off-trade Sales of Asian Speciality Drinks: % Volume Growth 2019-2024  
Table 4 - Off-trade Sales of Asian Speciality Drinks: % Value Growth 2019-2024  
Table 5 - NBO Company Shares of Off-trade Asian Speciality Drinks: % Volume 2020-2024  
Table 6 - LBN Brand Shares of Off-trade Asian Speciality Drinks: % Volume 2021-2024  
Table 7 - NBO Company Shares of Off-trade Asian Speciality Drinks: % Value 2020-2024  
Table 8 - LBN Brand Shares of Off-trade Asian Speciality Drinks: % Value 2021-2024  
Table 9 - Forecast Off-trade Sales of Asian Speciality Drinks: Volume 2024-2029  
Table 10 - Forecast Off-trade Sales of Asian Speciality Drinks: Value 2024-2029  
Table 11 - Forecast Off-trade Sales of Asian Speciality Drinks: % Volume Growth 2024-2029  
Table 12 - Forecast Off-trade Sales of Asian Speciality Drinks: % Value Growth 2024-2029

## Soft Drinks in Indonesia - Industry Overview

### EXECUTIVE SUMMARY

Soft drinks in 2024: The big picture  
2024 key trends  
Competitive landscape  
Retailing developments  
Foodservice vs retail split  
What next for soft drinks?

### MARKET DATA

Table 13 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2019-2024  
Table 14 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2019-2024  
Table 15 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2019-2024  
Table 16 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2019-2024  
Table 17 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2024  
Table 18 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2024  
Table 19 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2024  
Table 20 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2024  
Table 21 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2019-2024  
Table 22 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2019-2024  
Table 23 - Off-trade Sales of Soft Drinks by Category: Value 2019-2024  
Table 24 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2019-2024  
Table 25 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2019-2024  
Table 26 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2019-2024  
Table 27 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2020-2024

Table 28 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2021-2024

Table 29 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2020-2024

Table 30 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2021-2024

Table 31 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2024

Table 32 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2024

Table 33 - NBO Company Shares of Off-trade Soft Drinks: % Value 2020-2024

Table 34 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2021-2024

Table 35 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2019-2024

Table 36 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2019-2024

Table 37 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2019-2024

Table 38 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2024

Table 39 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2024-2029

Table 40 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2024-2029

Table 41 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2024-2029

Table 42 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2024-2029

Table 43 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2024-2029

Table 44 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2024-2029

Table 45 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2024-2029

Table 46 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2024-2029

Table 47 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2024-2029

Table 48 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2024-2029

## APPENDIX

Fountain sales in Indonesia

## DISCLAIMER

## SOURCES

Summary 1 - Research Sources

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/asian-speciality-drinks-in-indonesia/report](https://www.euromonitor.com/asian-speciality-drinks-in-indonesia/report).