

Soft Drinks in Indonesia

December 2024

Table of Contents

Soft Drinks in Indonesia

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 1 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2019-2024
- Table 2 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2019-2024
- Table 3 Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2019-2024
- Table 4 Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2019-2024
- Table 5 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2024
- Table 6 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2024
- Table 7 Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2024
- Table 8 Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2024
- Table 9 Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2019-2024
- Table 10 Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2019-2024
- Table 11 Off-trade Sales of Soft Drinks by Category: Value 2019-2024
- Table 12 Off-trade Sales of Soft Drinks by Category: % Value Growth 2019-2024
- Table 13 Sales of Soft Drinks by Total Fountain On-trade: Volume 2019-2024
- Table 14 Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2019-2024
- Table 15 NBO Company Shares of Total Soft Drinks (RTD): % Volume 2020-2024
- Table 16 LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2021-2024
- Table 17 NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2020-2024
- Table 18 LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2021-2024
- Table 19 NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2024
- Table 20 LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2024
- Table 21 NBO Company Shares of Off-trade Soft Drinks: % Value 2020-2024
- Table 22 LBN Brand Shares of Off-trade Soft Drinks: % Value 2021-2024
- Table 23 Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2019-2024
- Table 24 Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2019-2024
- Table 25 Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2019-2024
- Table 26 Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2024
- Table 27 Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2024-2029
- Table 28 Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2024-2029
- Table 29 Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2024-2029
- Table 30 Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2024-2029
- Table 31 Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2024-2029
- Table 32 Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2024-2029
- Table 33 Forecast Off-trade Sales of Soft Drinks by Category: Value 2024-2029
- Table 34 Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2024-2029
- Table 35 Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2024-2029
- Table 36 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

Bottled Water in Indonesia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Bottled water faces flat performance amid changing consumer preferences

Danone's Aqua continues to dominate market, despite growing competition from local brand Le Minerale

New packaging sizes drive consumer engagement

PROSPECTS AND OPPORTUNITIES

Despite competition from other beverages, emergence of more affordable cup formats will boost demand Health trends will support future growth and inform innovation Continued growth for foodservice sales

CATEGORY DATA

- Table 37 Off-trade Sales of Bottled Water by Category: Volume 2019-2024
- Table 38 Off-trade Sales of Bottled Water by Category: Value 2019-2024
- Table 39 Off-trade Sales of Bottled Water by Category: % Volume Growth 2019-2024
- Table 40 Off-trade Sales of Bottled Water by Category: % Value Growth 2019-2024
- Table 41 NBO Company Shares of Off-trade Bottled Water: % Volume 2020-2024
- Table 42 LBN Brand Shares of Off-trade Bottled Water: % Volume 2021-2024
- Table 43 NBO Company Shares of Off-trade Bottled Water: % Value 2020-2024
- Table 44 LBN Brand Shares of Off-trade Bottled Water: % Value 2021-2024
- Table 45 Forecast Off-trade Sales of Bottled Water by Category: Volume 2024-2029
- Table 46 Forecast Off-trade Sales of Bottled Water by Category: Value 2024-2029
- Table 47 Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2024-2029
- Table 48 Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2024-2029

Carbonates in Indonesia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Carbonates in Indonesia face challenges amidst shifting consumer priorities

Coca-Cola leverages marketing innovation amidst new competition from Nipis Madu

Consumer boycott of Western brands creates ripples across the industry

PROSPECTS AND OPPORTUNITIES

Static performance for carbonates, amid ongoing economic challenges

Health trends and sugar tax to shape the future of Indonesia's carbonates market

Modern trade channels will remain pivotal for premium carbonated brands like YOU C1000

CATEGORY DATA

- Table 49 Off-trade vs On-trade Sales of Carbonates: Volume 2019-2024
- Table 50 Off-trade vs On-trade Sales of Carbonates: Value 2019-2024
- Table 51 Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2019-2024
- Table 52 Off-trade vs On-trade Sales of Carbonates: % Value Growth 2019-2024
- Table 53 Off-trade Sales of Carbonates by Category: Volume 2019-2024
- Table 54 Off-trade Sales of Carbonates by Category: Value 2019-2024
- Table 55 Off-trade Sales of Carbonates by Category: % Volume Growth 2019-2024
- Table 56 Off-trade Sales of Carbonates by Category: % Value Growth 2019-2024
- Table 57 Total Sales of Carbonates by Fountain On-trade: Volume 2019-2024

- Table 58 Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2019-2024
- Table 59 NBO Company Shares of Off-trade Carbonates: % Volume 2020-2024
- Table 60 LBN Brand Shares of Off-trade Carbonates: % Volume 2021-2024
- Table 61 NBO Company Shares of Off-trade Carbonates: % Value 2020-2024
- Table 62 LBN Brand Shares of Off-trade Carbonates: % Value 2021-2024
- Table 63 Forecast Off-trade Sales of Carbonates by Category: Volume 2024-2029
- Table 64 Forecast Off-trade Sales of Carbonates by Category: Value 2024-2029
- Table 65 Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2024-2029
- Table 66 Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2024-2029
- Table 67 Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2024-2029
- Table 68 Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2024-2029

Concentrates in Indonesia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Positive growth for liquid concentrates, thanks to widening availability through street stalls and affordability

Fruit-flavoured powder concentrates face ongoing challenges

Lasalle Food Indonesia continues to benefit from strategic marketing efforts

PROSPECTS AND OPPORTUNITIES

Slow but steady growth for concentrates, with liquid varieties leading the way

Powder concentrates set to experience flat performance as convenience becomes a factor

Traditional channels will remain dominant for powder concentrates, while modern channels will drive growth for liquid varieties

CATEGORY DATA

Concentrates conversions

Summary 2 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

Table 69 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2019-2024

- Table 70 Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2019-2024
- Table 71 Off-trade Sales of Concentrates by Category: Value 2019-2024
- Table 72 Off-trade Sales of Concentrates by Category: % Value Growth 2019-2024
- Table 73 LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2021-2024
- Table 74 NBO Company Shares of Off-trade Concentrates: % Value 2020-2024
- Table 75 LBN Brand Shares of Off-trade Concentrates: % Value 2021-2024
- Table 76 NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2024
- Table 77 LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2024
- Table 78 NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2020-2024
- Table 79 LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2024
- Table 80 Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2024-2029
- Table 81 Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2024-2029
- Table 82 Forecast Off-trade Sales of Concentrates by Category: Value 2024-2029
- Table 83 Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2024-2029

Juice in Indonesia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Another year of positive growth for in 2024, despite flat performance from on-trade segment

Coconut and other plant waters see dynamic performance, with Hydro Coco making the largest sales contribution

Tirta Alam Segar's Ale-Ale is biggest volume sales contributor

PROSPECTS AND OPPORTUNITIES

Off-trade sales to see growth, albeit at a slower pace

On-trade juice sales will remain flat as challenging economic conditions and high prices hinder recovery

Low-priced strategies will remain a key focus

CATEGORY DATA

Table 84 - Off-trade Sales of Juice by Category: Volume 2019-2024

Table 85 - Off-trade Sales of Juice by Category: Value 2019-2024

Table 86 - Off-trade Sales of Juice by Category: % Volume Growth 2019-2024

Table 87 - Off-trade Sales of Juice by Category: % Value Growth 2019-2024

Table 88 - NBO Company Shares of Off-trade Juice: % Volume 2020-2024

Table 89 - LBN Brand Shares of Off-trade Juice: % Volume 2021-2024

Table 90 - NBO Company Shares of Off-trade Juice: % Value 2020-2024

Table 91 - LBN Brand Shares of Off-trade Juice: % Value 2021-2024

Table 92 - Forecast Off-trade Sales of Juice by Category: Volume 2024-2029

Table 93 - Forecast Off-trade Sales of Juice by Category: Value 2024-2029

Table 94 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2024-2029

Table 95 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2024-2029

RTD Coffee in Indonesia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Another good year for RTD coffee, driven by lifestyle factors and affordability

Local companies continue to lead the market

RTD coffee brands tackle price increases with strategic packaging and promotions

PROSPECTS AND OPPORTUNITIES

RTD coffee set for continued growth with new flavours and brand innovations

Cheap coffee from street stalls could pose competition to premium RTD coffee

PET bottles will remain popular, while cup packaging will gain ground

CATEGORY DATA

Table 96 - Off-trade Sales of RTD Coffee: Volume 2019-2024

Table 97 - Off-trade Sales of RTD Coffee: Value 2019-2024

Table 98 - Off-trade Sales of RTD Coffee: % Volume Growth 2019-2024

Table 99 - Off-trade Sales of RTD Coffee: % Value Growth 2019-2024

Table 100 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2020-2024

Table 101 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2021-2024

Table 102 - NBO Company Shares of Off-trade RTD Coffee: % Value 2020-2024

Table 103 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2021-2024

Table 104 - Forecast Off-trade Sales of RTD Coffee: Volume 2024-2029

Table 105 - Forecast Off-trade Sales of RTD Coffee: Value 2024-2029

Table 106 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2024-2029

Table 107 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2024-2029

RTD Tea in Indonesia

KEY DATA FINDINGS

2024 DEVELOPMENTS

RTD faces challenges of consumer price sensitivity and lack of innovation

CS2 Pola Sehat maintains its lead, while Sinar Sosro PT boosts share through new product innovations and strategic marketing

Brands adjust promotional strategies to maintain stability in a mature market

PROSPECTS AND OPPORTUNITIES

Modest growth for RTD, in light of high level of maturity and emerging competitors

Rising unit prices expected, but brands will focus on affordability

Rising levels of health consciousness will drive innovation

CATEGORY DATA

Table 108 - Off-trade Sales of RTD Tea by Category: Volume 2019-2024

Table 109 - Off-trade Sales of RTD Tea by Category: Value 2019-2024

Table 110 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2019-2024

Table 111 - Off-trade Sales of RTD Tea by Category: % Value Growth 2019-2024

Table 112 - Leading Flavours for Off-trade RTD Tea: % Volume 2019-2024

Table 113 - NBO Company Shares of Off-trade RTD Tea: % Volume 2020-2024

Table 114 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2021-2024

Table 115 - NBO Company Shares of Off-trade RTD Tea: % Value 2020-2024

Table 116 - LBN Brand Shares of Off-trade RTD Tea: % Value 2021-2024

Table 117 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2024-2029

Table 118 - Forecast Off-trade Sales of RTD Tea by Category: Value 2024-2029

Table 119 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2024-2029

Table 120 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2024-2029

Energy Drinks in Indonesia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Robust growth in energy drinks, driven by widening availability of affordable formats

Strategic marketing efforts to address competition

Leading brand loses share to rivals

PROSPECTS AND OPPORTUNITIES

Modest growth, despite ongoing challenges

Cup packaging will remain the biggest sales contributor

Cut price promotions will continue as key marketing strategy in modern channels

CATEGORY DATA

Table 121 - Off-trade Sales of Energy Drinks: Volume 2019-2024

Table 122 - Off-trade Sales of Energy Drinks: Value 2019-2024

Table 123 - Off-trade Sales of Energy Drinks: % Volume Growth 2019-2024

Table 124 - Off-trade Sales of Energy Drinks: % Value Growth 2019-2024

Table 125 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2020-2024

Table 126 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2021-2024

Table 127 - NBO Company Shares of Off-trade Energy Drinks: % Value 2020-2024

Table 128 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2021-2024

Table 129 - Forecast Off-trade Sales of Energy Drinks: Volume 2024-2029

Table 130 - Forecast Off-trade Sales of Energy Drinks: Value 2024-2029

Table 131 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2024-2029

Table 132 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2024-2029

Sports Drinks in Indonesia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Limited growth for sports drinks amid ongoing challenges

Outstanding performance by Isoplus

New entrant targets health-conscious Gen Z consumers

PROSPECTS AND OPPORTUNITIES

Off-trade demand will fail to recover to pre-pandemic levels during the forecast period

Active lifestyle trends and brand strategies will drive sales

Economy brands will gain traction

CATEGORY DATA

Table 133 - Off-trade Sales of Sports Drinks: Volume 2019-2024

Table 134 - Off-trade Sales of Sports Drinks: Value 2019-2024

Table 135 - Off-trade Sales of Sports Drinks: % Volume Growth 2019-2024

Table 136 - Off-trade Sales of Sports Drinks: % Value Growth 2019-2024

Table 137 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2020-2024

Table 138 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2021-2024

Table 139 - NBO Company Shares of Off-trade Sports Drinks: % Value 2020-2024

Table 140 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2021-2024

Table 141 - Forecast Off-trade Sales of Sports Drinks: Volume 2024-2029

Table 142 - Forecast Off-trade Sales of Sports Drinks: Value 2024-2029

Table 143 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2024-2029

Table 144 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2024-2029

Asian Speciality Drinks in Indonesia

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 145 - Off-trade Sales of Asian Speciality Drinks: Volume 2019-2024

Table 146 - Off-trade Sales of Asian Speciality Drinks: Value 2019-2024

Table 147 - Off-trade Sales of Asian Speciality Drinks: % Volume Growth 2019-2024

Table 148 - Off-trade Sales of Asian Speciality Drinks: % Value Growth 2019-2024

Table 149 - NBO Company Shares of Off-trade Asian Speciality Drinks: % Volume 2020-2024

Table 150 - LBN Brand Shares of Off-trade Asian Speciality Drinks: % Volume 2021-2024

Table 151 - NBO Company Shares of Off-trade Asian Speciality Drinks: % Value 2020-2024

Table 152 - LBN Brand Shares of Off-trade Asian Speciality Drinks: % Value 2021-2024

Table 153 - Forecast Off-trade Sales of Asian Speciality Drinks: Volume 2024-2029

Table 154 - Forecast Off-trade Sales of Asian Speciality Drinks: Value 2024-2029

Table 155 - Forecast Off-trade Sales of Asian Speciality Drinks: % Volume Growth 2024-2029

Table 156 - Forecast Off-trade Sales of Asian Speciality Drinks: % Value Growth 2024-2029

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/soft-drinks-in-indonesia/report.