

# Bottled Water in Indonesia

January 2024

Table of Contents

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Off-trade sales rise but fail to make full recovery in 2023

Danone Aqua maintains leadership

On-trade growth sees slowdown as it struggles to recover to pre-pandemic sales levels

#### PROSPECTS AND OPPORTUNITIES

Competitive threats will intensify, potentially hampering category growth

Health trends to support future growth and inform innovation, while players focus on prices and pack sizes

Still purified bottled water set to continue to drive overall category growth as still spring bottled water sees improved penetration

#### CATEGORY DATA

Table 1 - Off-trade Sales of Bottled Water by Category: Volume 2018-2023

Table 2 - Off-trade Sales of Bottled Water by Category: Value 2018-2023

Table 3 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2018-2023

Table 4 - Off-trade Sales of Bottled Water by Category: % Value Growth 2018-2023

Table 5 - NBO Company Shares of Off-trade Bottled Water: % Volume 2019-2023

Table 6 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2020-2023

Table 7 - NBO Company Shares of Off-trade Bottled Water: % Value 2019-2023

Table 8 - LBN Brand Shares of Off-trade Bottled Water: % Value 2020-2023

Table 9 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2023-2028

Table 10 - Forecast Off-trade Sales of Bottled Water by Category: Value 2023-2028

Table 11 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2023-2028

Table 12 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2023-2028

## Soft Drinks in Indonesia - Industry Overview

### EXECUTIVE SUMMARY

Soft drinks in 2023: The big picture

2023 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 2018-2023

Table 14 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2018-2023

Table 15 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2018-2023

Table 16 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2018-2023

Table 17 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2022

Table 18 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2022

Table 19 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2022

Table 20 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2022

Table 21 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2018-2023

Table 22 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2018-2023

Table 23 - Off-trade Sales of Soft Drinks by Category: Value 2018-2023

Table 24 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2018-2023

Table 25 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2018-2023

Table 26 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2018-2023

Table 27 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2019-2023

Table 28 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2020-2023

Table 29 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2019-2023

Table 30 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2020-2023

Table 31 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2019-2023

Table 32 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2023

Table 33 - NBO Company Shares of Off-trade Soft Drinks: % Value 2019-2023

Table 34 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2020-2023

Table 35 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2018-2023

Table 36 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2018-2023

Table 37 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2018-2023

Table 38 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2023

Table 39 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2023-2028

Table 40 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2023-2028

Table 41 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2023-2028

Table 42 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2023-2028

Table 43 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2023-2028

Table 44 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2023-2028

Table 45 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2023-2028

Table 46 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2023-2028

Table 47 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2023-2028

Table 48 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2023-2028

## 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/bottled-water-in-indonesia/report](https://www.euromonitor.com/bottled-water-in-indonesia/report).