

Alcoholic Drinks in Indonesia

June 2023

Table of Contents

EXECUTIVE SUMMARY

Alcoholic drinks in 2022: The big picture

2022 key trends

Competitive landscape

Retailing developments

On-trade vs off-trade split

What next for alcoholic drinks?

MARKET BACKGROUND

Legislation

Legal purchasing age and legal drinking age

Drink driving

Advertising

Smoking ban

Opening hours

On-trade establishments

Table 1 - Number of On-trade Establishments by Type 2016-2022

TAXATION AND DUTY LEVIES

Summary 1 - Taxation and Duty Levies on Alcoholic Drinks 2022

OPERATING ENVIRONMENT

Contraband/parallel trade

Duty free

Cross-border/private imports

KEY NEW PRODUCT LAUNCHES

Outlook

MARKET INDICATORS

Table 2 - Retail Consumer Expenditure on Alcoholic Drinks 2017-2022

MARKET DATA

Table 3 - Sales of Alcoholic Drinks by Category: Total Volume 2017-2022

Table 4 - Sales of Alcoholic Drinks by Category: Total Value 2017-2022

Table 5 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2017-2022

Table 6 - Sales of Alcoholic Drinks by Category: % Total Value Growth 2017-2022

Table 7 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2022

Table 8 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2022

Table 9 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2022

Table 10 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2022

Table 11 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2018-2022

Table 12 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2017-2022

Table 13 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2022

Table 14 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2022-2027

Table 15 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2022-2027

Table 16 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2022-2027

Table 17 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2022-2027

DISCLAIMER

SOURCES

Summary 2 - Research Sources

Beer in Indonesia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Multi Bintang Indonesia PT Tbk continues to lead the market

In-home consumption boosts sales through the off-trade channel

Increase in popularity amongst younger consumers of legal drinking age and female consumers supports the performance of low alcohol beer and flavoured lager

PROSPECTS AND OPPORTUNITIES

Online sales expected to gain more popularity amongst Indonesian consumers

Expect locally produced products to enter the market

Economic uncertainty may impede the development of the beer market

CATEGORY BACKGROUND

Lager price band methodology

Summary 3 - Lager by Price Band 2022

Table 18 - Number of Breweries 2017-2022

CATEGORY DATA

Table 19 - Sales of Beer by Category: Total Volume 2017-2022

Table 20 - Sales of Beer by Category: Total Value 2017-2022

Table 21 - Sales of Beer by Category: % Total Volume Growth 2017-2022

Table 22 - Sales of Beer by Category: % Total Value Growth 2017-2022

Table 23 - Sales of Beer by Off-trade vs On-trade: Volume 2017-2022

Table 24 - Sales of Beer by Off-trade vs On-trade: Value 2017-2022

Table 25 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2017-2022

Table 26 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2017-2022

Table 27 - Sales of Beer by Craft vs Standard 2017-2022

Table 28 - GBO Company Shares of Beer: % Total Volume 2018-2022

Table 29 - NBO Company Shares of Beer: % Total Volume 2018-2022

Table 30 - LBN Brand Shares of Beer: % Total Volume 2019-2022

Table 31 - Forecast Sales of Beer by Category: Total Volume 2022-2027

Table 32 - Forecast Sales of Beer by Category: Total Value 2022-2027

Table 33 - Forecast Sales of Beer by Category: % Total Volume Growth 2022-2027

Table 34 - Forecast Sales of Beer by Category: % Total Value Growth 2022-2027

Cider/Perry in Indonesia

KEY DATA FINDINGS

2022 DEVELOPMENTS

On-trade cider sales see some recovery despite facing strong competition

Availability online and revival of international tourism support the category's performance

Albens extends lead as it recovers from impact of COVID-19 crisis

PROSPECTS AND OPPORTUNITIES

Competing in the flavoured alcoholic drinks segment

Expansion of e-commerce has potential to support category development

Female consumers may be the biggest target for cider players in the future

CATEGORY DATA

Table 35 - Sales of Cider/Perry: Total Volume 2017-2022
 Table 36 - Sales of Cider/Perry: Total Value 2017-2022
 Table 37 - Sales of Cider/Perry: % Total Volume Growth 2017-2022
 Table 38 - Sales of Cider/Perry: % Total Value Growth 2017-2022
 Table 39 - Sales of Cider/Perry by Off-trade vs On-trade: Volume 2017-2022
 Table 40 - Sales of Cider/Perry by Off-trade vs On-trade: Value 2017-2022
 Table 41 - Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2017-2022
 Table 42 - Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2017-2022
 Table 43 - GBO Company Shares of Cider/Perry: % Total Volume 2018-2022
 Table 44 - NBO Company Shares of Cider/Perry: % Total Volume 2018-2022
 Table 45 - LBN Brand Shares of Cider/Perry: % Total Volume 2019-2022
 Table 46 - Forecast Sales of Cider/Perry: Total Volume 2022-2027
 Table 47 - Forecast Sales of Cider/Perry: Total Value 2022-2027
 Table 48 - Forecast Sales of Cider/Perry: % Total Volume Growth 2022-2027
 Table 49 - Forecast Sales of Cider/Perry: % Total Value Growth 2022-2027

Rtds in Indonesia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Orang Tua Group employs new strategies to support its RTDs performance
 Failure to recover from the convenience store ban as category faces increasing competition
 Online sales support RTDs' performance

PROSPECTS AND OPPORTUNITIES

More competition from other categories
 Lack of new product innovation could hinder category growth
 Consumers are price sensitive and more promotion is expected in the forecast period

CATEGORY DATA

Table 50 - Sales of RTDs by Category: Total Volume 2017-2022
 Table 51 - Sales of RTDs by Category: Total Value 2017-2022
 Table 52 - Sales of RTDs by Category: % Total Volume Growth 2017-2022
 Table 53 - Sales of RTDs by Category: % Total Value Growth 2017-2022
 Table 54 - Sales of RTDs by Off-trade vs On-trade: Volume 2017-2022
 Table 55 - Sales of RTDs by Off-trade vs On-trade: Value 2017-2022
 Table 56 - Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2017-2022
 Table 57 - Sales of RTDs by Off-trade vs On-trade: % Value Growth 2017-2022
 Table 58 - GBO Company Shares of RTDs: % Total Volume 2018-2022
 Table 59 - NBO Company Shares of RTDs: % Total Volume 2018-2022
 Table 60 - LBN Brand Shares of RTDs: % Total Volume 2019-2022
 Table 61 - Forecast Sales of RTDs by Category: Total Volume 2022-2027
 Table 62 - Forecast Sales of RTDs by Category: Total Value 2022-2027
 Table 63 - Forecast Sales of RTDs by Category: % Total Volume Growth 2022-2027
 Table 64 - Forecast Sales of RTDs by Category: % Total Value Growth 2022-2027

Spirits in Indonesia

KEY DATA FINDINGS

2022 DEVELOPMENTS

More product variation supports the growth of shochu/soju in Indonesia
 On-trade performance recovery boosted by easing of pandemic restrictions, while online sales and social media content support off-trade performance

Gordon's continues to grow strongly

PROSPECTS AND OPPORTUNITIES

Increased promotion to attract more consumers

Shochu/soju is expected to continue its excellent performance

Local products gaining in popularity

CATEGORY BACKGROUND

Vodka, gin, other blended Scotch whisky, dark rum and white rum price band methodology

Summary 4 - Benchmark Brands 2022

CATEGORY DATA

Table 65 - Sales of Spirits by Category: Total Volume 2017-2022

Table 66 - Sales of Spirits by Category: Total Value 2017-2022

Table 67 - Sales of Spirits by Category: % Total Volume Growth 2017-2022

Table 68 - Sales of Spirits by Category: % Total Value Growth 2017-2022

Table 69 - Sales of Spirits by Off-trade vs On-trade: Volume 2017-2022

Table 70 - Sales of Spirits by Off-trade vs On-trade: Value 2017-2022

Table 71 - Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2017-2022

Table 72 - Sales of Spirits by Off-trade vs On-trade: % Value Growth 2017-2022

Table 73 - Sales of Dark Rum by Price Platform: % Total Volume 2017-2022

Table 74 - Sales of White Rum by Price Platform: % Total Volume 2017-2022

Table 75 - Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2017-2022

Table 76 - Sales of English Gin by Price Platform: % Total Volume 2017-2022

Table 77 - Sales of Vodka by Price Platform: % Total Volume 2017-2022

Table 78 - Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2017-2022

Table 79 - GBO Company Shares of Spirits: % Total Volume 2018-2022

Table 80 - NBO Company Shares of Spirits: % Total Volume 2018-2022

Table 81 - LBN Brand Shares of Spirits: % Total Volume 2019-2022

Table 82 - Forecast Sales of Spirits by Category: Total Volume 2022-2027

Table 83 - Forecast Sales of Spirits by Category: Total Value 2022-2027

Table 84 - Forecast Sales of Spirits by Category: % Total Volume Growth 2022-2027

Table 85 - Forecast Sales of Spirits by Category: % Total Value Growth 2022-2027

Wine in Indonesia

KEY DATA FINDINGS

2022 DEVELOPMENTS

New World wines gain in popularity thanks to their affordable pricing

Orang Tua Group grows strongly with new marketing strategy

Local wine gains in popularity for both domestic and international consumers with more brand education

PROSPECTS AND OPPORTUNITIES

Online sales support the growth of wine in Indonesia

In-home consumption is likely to drive sales of wine, while on-trade set to see increased availability

Fruit and herbal wine to remain dominant

CATEGORY DATA

Table 86 - Sales of Wine by Category: Total Volume 2017-2022

Table 87 - Sales of Wine by Category: Total Value 2017-2022

Table 88 - Sales of Wine by Category: % Total Volume Growth 2017-2022

Table 89 - Sales of Wine by Category: % Total Value Growth 2017-2022

Table 90 - Sales of Wine by Off-trade vs On-trade: Volume 2017-2022

Table 91 - Sales of Wine by Off-trade vs On-trade: Value 2017-2022

Table 92 - Sales of Wine by Off-trade vs On-trade: % Volume Growth 2017-2022

Table 93 - Sales of Wine by Off-trade vs On-trade: % Value Growth 2017-2022

Table 94 - Sales of Still Red Wine by Price Segment: % Off-trade Volume 2017-2022

Table 95 - Sales of Still Rosé Wine by Price Segment: % Off-trade Volume 2017-2022

Table 96 - Sales of Still White Wine by Price Segment: % Off-trade Volume 2017-2022

Table 97 - Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2017-2022

Table 98 - GBO Company Shares of Still Light Grape Wine: % Total Volume 2018-2022

Table 99 - NBO Company Shares of Still Light Grape Wine: % Total Volume 2018-2022

Table 100 - LBN Brand Shares of Still Light Grape Wine: % Total Volume 2019-2022

Table 101 - GBO Company Shares of Champagne: % Total Volume 2018-2022

Table 102 - NBO Company Shares of Champagne: % Total Volume 2018-2022

Table 103 - LBN Brand Shares of Champagne: % Total Volume 2019-2022

Table 104 - GBO Company Shares of Other Sparkling Wine: % Total Volume 2018-2022

Table 105 - NBO Company Shares of Other Sparkling Wine: % Total Volume 2018-2022

Table 106 - LBN Brand Shares of Other Sparkling Wine: % Total Volume 2019-2022

Table 107 - GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2018-2022

Table 108 - NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2018-2022

Table 109 - LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2019-2022

Table 110 - GBO Company Shares of Non-grape Wine: % Total Volume 2018-2022

Table 111 - NBO Company Shares of Non-grape Wine: % Total Volume 2018-2022

Table 112 - LBN Brand Shares of Non-grape Wine: % Total Volume 2019-2022

Table 113 - Forecast Sales of Wine by Category: Total Volume 2022-2027

Table 114 - Forecast Sales of Wine by Category: Total Value 2022-2027

Table 115 - Forecast Sales of Wine by Category: % Total Volume Growth 2022-2027

Table 116 - Forecast Sales of Wine by Category: % Total Value Growth 2022-2027

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/alcoholic-drinks-in-indonesia/report.