



Euromonitor
International

Alcoholic Drinks in Indonesia

August 2025

Table of Contents

EXECUTIVE SUMMARY

- Alcoholic drinks in 2024: The big picture
- 2024 key trends
- Competitive landscape
- Retail 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

TAXATION AND DUTY LEVIES

OPERATING ENVIRONMENT

- Contraband/parallel trade
- Duty free
- Cross-border/private imports

KEY NEW PRODUCT LAUNCHES

- Outlook

MARKET INDICATORS

Table 1 - Retail Consumer Expenditure on Alcoholic Drinks 2019-2024

MARKET DATA

- Table 2 - Sales of Alcoholic Drinks by Category: Total Volume 2019-2024
- Table 3 - Sales of Alcoholic Drinks by Category: Total Value 2019-2024
- Table 4 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2019-2024
- Table 5 - Sales of Alcoholic Drinks by Category: % Total Value Growth 2019-2024
- Table 6 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2020-2024
- Table 7 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2019-2024
- Table 8 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2024
- Table 9 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2024-2029
- Table 10 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2024-2029
- Table 11 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2024-2029
- Table 12 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2024-2029

DISCLAIMER

SOURCES

- Summary 1 - Research Sources

KEY DATA FINDINGS

2024 DEVELOPMENTS

Beer sees slower volume growth amidst uncertain economic conditions
Multi Bintang Indonesia continues to dominate beer
Small local grocers supports impulse purchases of beer

PROSPECTS AND OPPORTUNITIES

Tourism expected to drive growth in sales of beer over the forecast period
Premiumisation and flavour innovation set to drive experience-led growth
Increase in sustainable practices anticipated amongst beer companies

CATEGORY BACKGROUND

Lager price band methodology
Summary 2 - Lager by Price Band 2024

CATEGORY DATA

Table 13 - Sales of Beer by Category: Total Volume 2019-2024
Table 14 - Sales of Beer by Category: Total Value 2019-2024
Table 15 - Sales of Beer by Category: % Total Volume Growth 2019-2024
Table 16 - Sales of Beer by Category: % Total Value Growth 2019-2024
Table 17 - Sales of Beer by Off-trade vs On-trade: Volume 2019-2024
Table 18 - Sales of Beer by Off-trade vs On-trade: Value 2019-2024
Table 19 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2019-2024
Table 20 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2019-2024
Table 21 - Sales of Beer by Craft vs Standard 2019-2024
Table 22 - GBO Company Shares of Beer: % Total Volume 2020-2024
Table 23 - NBO Company Shares of Beer: % Total Volume 2020-2024
Table 24 - LBN Brand Shares of Beer: % Total Volume 2021-2024
Table 25 - Forecast Sales of Beer by Category: Total Volume 2024-2029
Table 26 - Forecast Sales of Beer by Category: Total Value 2024-2029
Table 27 - Forecast Sales of Beer by Category: % Total Volume Growth 2024-2029
Table 28 - Forecast Sales of Beer by Category: % Total Value Growth 2024-2029

Cider/Perry in Indonesia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Cider/perry struggles with waning consumer interest from a low base
Indosarnia PT maintains its dominance in a challenged category
Food/drink/tobacco specialists is the key distribution channel for cider/perry

PROSPECTS AND OPPORTUNITIES

Cider/perry will continue face challenges in the forecast period, with increased competition from RTDs and flavoured beers
Lifestyle positioning and targeted engagement
Flavour innovation and expansion of consumption occasions will be important

CATEGORY DATA

Table 29 - Sales of Cider/Perry: Total Volume 2019-2024
Table 30 - Sales of Cider/Perry: Total Value 2019-2024
Table 31 - Sales of Cider/Perry: % Total Volume Growth 2019-2024
Table 32 - Sales of Cider/Perry: % Total Value Growth 2019-2024
Table 33 - Sales of Cider/Perry by Off-trade vs On-trade: Volume 2019-2024
Table 34 - Sales of Cider/Perry by Off-trade vs On-trade: Value 2019-2024
Table 35 - Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2019-2024
Table 36 - Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2019-2024

Table 37 - GBO Company Shares of Cider/Perry: % Total Volume 2020-2024

Table 38 - NBO Company Shares of Cider/Perry: % Total Volume 2020-2024

Table 39 - LBN Brand Shares of Cider/Perry: % Total Volume 2021-2024

Table 40 - Forecast Sales of Cider/Perry: Total Volume 2024-2029

Table 41 - Forecast Sales of Cider/Perry: Total Value 2024-2029

Table 42 - Forecast Sales of Cider/Perry: % Total Volume Growth 2024-2029

Table 43 - Forecast Sales of Cider/Perry: % Total Value Growth 2024-2029

[Rtds in Indonesia](#)

KEY DATA FINDINGS

2024 DEVELOPMENTS

Moderate growth amidst limited innovation, with spirit-based RTDs dominant

Diageo Plc maintains its leading position, although the competition from smaller brands rises

Modern grocery retailers continue to dominate the distribution of RTDs

PROSPECTS AND OPPORTUNITIES

Steady growth expected in RTDs, with digital engagement and flavour variety key to sustaining consumer interest

Smirnoff Ice refreshes its packaging to boost Gen Z appeal and shelf impact

RTDs could benefit from a presence at festivals and low alcohol appeal to drive relevance

CATEGORY DATA

Table 44 - Sales of RTDs by Category: Total Volume 2019-2024

Table 45 - Sales of RTDs by Category: Total Value 2019-2024

Table 46 - Sales of RTDs by Category: % Total Volume Growth 2019-2024

Table 47 - Sales of RTDs by Category: % Total Value Growth 2019-2024

Table 48 - Sales of RTDs by Off-trade vs On-trade: Volume 2019-2024

Table 49 - Sales of RTDs by Off-trade vs On-trade: Value 2019-2024

Table 50 - Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2019-2024

Table 51 - Sales of RTDs by Off-trade vs On-trade: % Value Growth 2019-2024

Table 52 - GBO Company Shares of RTDs: % Total Volume 2020-2024

Table 53 - NBO Company Shares of RTDs: % Total Volume 2020-2024

Table 54 - LBN Brand Shares of RTDs: % Total Volume 2021-2024

Table 55 - Forecast Sales of RTDs by Category: Total Volume 2024-2029

Table 56 - Forecast Sales of RTDs by Category: Total Value 2024-2029

Table 57 - Forecast Sales of RTDs by Category: % Total Volume Growth 2024-2029

Table 58 - Forecast Sales of RTDs by Category: % Total Value Growth 2024-2029

[Spirits in Indonesia](#)

KEY DATA FINDINGS

2024 DEVELOPMENTS

Urban drinking culture and tourism fuel growth in spirits

Diageo Plc continues to lead spirits, but sees a share decline as smaller players are dynamic

Specialist outlets continue to lead thanks to a wide variety and convenience

PROSPECTS AND OPPORTUNITIES

Spirits expected to see stable growth through intensive brand engagement

Local innovation expected to drive greater consumer interest in spirits

Global brands likely to continue to lead sustainability efforts in spirits

CATEGORY BACKGROUND

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

CATEGORY DATA

Table 59 - Sales of Spirits by Category: Total Volume 2019-2024
Table 60 - Sales of Spirits by Category: Total Value 2019-2024
Table 61 - Sales of Spirits by Category: % Total Volume Growth 2019-2024
Table 62 - Sales of Spirits by Category: % Total Value Growth 2019-2024
Table 63 - Sales of Spirits by Off-trade vs On-trade: Volume 2019-2024
Table 64 - Sales of Spirits by Off-trade vs On-trade: Value 2019-2024
Table 65 - Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2019-2024
Table 66 - Sales of Spirits by Off-trade vs On-trade: % Value Growth 2019-2024
Table 67 - Sales of Dark Rum by Price Platform: % Total Volume 2019-2024
Table 68 - Sales of White Rum by Price Platform: % Total Volume 2019-2024
Table 69 - Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2019-2024
Table 70 - Sales of English Gin by Price Platform: % Total Volume 2019-2024
Table 71 - Sales of Vodka by Price Platform: % Total Volume 2019-2024
Table 72 - Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2019-2024
Table 73 - GBO Company Shares of Spirits: % Total Volume 2020-2024
Table 74 - NBO Company Shares of Spirits: % Total Volume 2020-2024
Table 75 - LBN Brand Shares of Spirits: % Total Volume 2021-2024
Table 76 - Forecast Sales of Spirits by Category: Total Volume 2024-2029
Table 77 - Forecast Sales of Spirits by Category: Total Value 2024-2029
Table 78 - Forecast Sales of Spirits by Category: % Total Volume Growth 2024-2029
Table 79 - Forecast Sales of Spirits by Category: % Total Value Growth 2024-2029

Wine in Indonesia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Fruit and herbal wines drives sales and growth in wine in Indonesia
- Local and global brands compete through innovation
- Small local grocers continues to dominate

PROSPECTS AND OPPORTUNITIES

- Urban dining and social culture set to propel dynamic growth for wine over the forecast period
- Local identity and premium experiences to elevate the appeal of wine
- Sustainability and health-conscious innovations likely to reshape wine preferences

CATEGORY DATA

Table 80 - Sales of Wine by Category: Total Volume 2019-2024
Table 81 - Sales of Wine by Category: Total Value 2019-2024
Table 82 - Sales of Wine by Category: % Total Volume Growth 2019-2024
Table 83 - Sales of Wine by Category: % Total Value Growth 2019-2024
Table 84 - Sales of Wine by Off-trade vs On-trade: Volume 2019-2024
Table 85 - Sales of Wine by Off-trade vs On-trade: Value 2019-2024
Table 86 - Sales of Wine by Off-trade vs On-trade: % Volume Growth 2019-2024
Table 87 - Sales of Wine by Off-trade vs On-trade: % Value Growth 2019-2024
Table 88 - Sales of Still Red Wine by Price Segment: % Off-trade Volume 2019-2024
Table 89 - Sales of Still Rosé Wine by Price Segment: % Off-trade Volume 2019-2024
Table 90 - Sales of Still White Wine by Price Segment: % Off-trade Volume 2019-2024
Table 91 - Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2019-2024
Table 92 - GBO Company Shares of Still Light Grape Wine: % Total Volume 2020-2024

Table 93 - NBO Company Shares of Still Light Grape Wine: % Total Volume 2020-2024

Table 94 - LBN Brand Shares of Still Light Grape Wine: % Total Volume 2021-2024

Table 95 - GBO Company Shares of Champagne: % Total Volume 2020-2024

Table 96 - NBO Company Shares of Champagne: % Total Volume 2020-2024

Table 97 - LBN Brand Shares of Champagne: % Total Volume 2021-2024

Table 98 - GBO Company Shares of Other Sparkling Wine: % Total Volume 2020-2024

Table 99 - NBO Company Shares of Other Sparkling Wine: % Total Volume 2020-2024

Table 100 - LBN Brand Shares of Other Sparkling Wine: % Total Volume 2021-2024

Table 101 - GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2020-2024

Table 102 - NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2020-2024

Table 103 - LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2021-2024

Table 104 - GBO Company Shares of Non-grape Wine: % Total Volume 2020-2024

Table 105 - NBO Company Shares of Non-grape Wine: % Total Volume 2020-2024

Table 106 - LBN Brand Shares of Non-grape Wine: % Total Volume 2021-2024

Table 107 - Forecast Sales of Wine by Category: Total Volume 2024-2029

Table 108 - Forecast Sales of Wine by Category: Total Value 2024-2029

Table 109 - Forecast Sales of Wine by Category: % Total Volume Growth 2024-2029

Table 110 - Forecast Sales of Wine by Category: % Total 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/alcoholic-drinks-in-indonesia/report.