



Concentrates in Indonesia

November 2025

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Concentrates in Indonesia - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Mixed fortunes in local concentrates: Powder thrives as liquid faces headwinds

INDUSTRY PERFORMANCE

Stagnant innovation, but kiosks drive modest growth in local concentrates

Powder leads on price and variety, liquid thrives on strategic promotions

WHAT'S NEXT?

Stable prices and innovation to drive powder concentrate growth, outpacing liquid

Grassroots creativity versus stagnation in concentrates

Future challenges for concentrates: Competing with aggressive discounts and driving innovation

COMPETITIVE LANDSCAPE

Innovative advertising and digital promotions support Lasalle Food's leadership

Innovation, variety, and distribution drive Nutrifood's dynamism in concentrates

CHANNELS

Sachet sales and core consumers drive dominance of small local grocers

Online grocers, niche brands, and exclusivity fuel e-commerce growth

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Price hikes and promotions shape performance of soft drinks in Indonesia

Health and wellness soft drinks expand into Indonesia's local grocers

Hygiene, convenience, and at-home consumption drive bulk bottled water growth

Mixed flavour combinations drive soft drink innovation

WHAT'S NEXT?

Future growth to be driven by economic recovery and strategic innovation

E-commerce's dynamic role in accessing niche markets

Impending sugar tax likely to lead to price hikes and reformulation

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Danone's unwavering leadership through brand strength and strategic reach

Competitive pricing, widespread distribution, and market shifts propel Nipis Madu's growth

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