



# Juice in Indonesia

November 2025

Table of Contents

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Affordability and digital channels drive off-trade juice growth, while on-trade declines

### INDUSTRY PERFORMANCE

Off-trade growth for juice amidst on-trade challenges

Juice drinks benefits from affordable cup packaging

### WHAT'S NEXT?

Off-trade expansion driven by juice drinks, while on-trade and 100% juice face headwinds

Affordable, single-serve packaging to boost juice sales in convenience stores

Flavour and health innovations to target mid- to high-income consumers

### COMPETITIVE LANDSCAPE

Tirta Alam Segar dominates juice through strategic affordability

Mogu Mogu effectively targets wide consumer demographic to record strong growth

### CHANNELS

Cup packaging and proximity drive dominance of small local grocers in juice distribution

Strategic shifts and logistics innovations fuel dynamic juice growth via e-commerce

### CATEGORY DATA

Table 1 - Off-trade Sales of Juice by Category: Volume 2020-2025

Table 2 - Off-trade Sales of Juice by Category: Value 2020-2025

Table 3 - Off-trade Sales of Juice by Category: % Volume Growth 2020-2025

Table 4 - Off-trade Sales of Juice by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Off-trade Juice: % Volume 2021-2025

Table 6 - LBN Brand Shares of Off-trade Juice: % Volume 2022-2025

Table 7 - NBO Company Shares of Off-trade Juice: % Value 2021-2025

Table 8 - LBN Brand Shares of Off-trade Juice: % Value 2022-2025

Table 9 - Forecast Off-trade Sales of Juice by Category: Volume 2025-2030

Table 10 - Forecast Off-trade Sales of Juice by Category: Value 2025-2030

Table 11 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2025-2030

Table 12 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2025-2030

### COUNTRY REPORTS DISCLAIMER

## Soft Drinks in Indonesia - Industry Overview

### EXECUTIVE SUMMARY

Resilience and reformulation: Soft drinks navigate stagnation towards future growth

### KEY DATA FINDINGS

### INDUSTRY PERFORMANCE

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

## COMPETITIVE LANDSCAPE

Danone's unwavering leadership through brand strength and strategic reach  
Competitive pricing, widespread distribution, and market shifts propel Nipis Madu's growth

## CHANNELS

Consumers favour small local grocers for accessibility  
E-commerce is the dynamic force reshaping retail of soft drinks in Indonesia  
Foodservice vs retail split

## MARKET DATA

Table 13 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025  
Table 14 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025  
Table 15 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025  
Table 16 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025  
Table 17 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025  
Table 18 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025  
Table 19 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025  
Table 20 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025  
Table 21 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025  
Table 22 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025  
Table 23 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025  
Table 24 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025  
Table 25 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025  
Table 26 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025  
Table 27 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025  
Table 28 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025  
Table 29 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025  
Table 30 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025  
Table 31 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025  
Table 32 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025  
Table 33 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025  
Table 34 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025  
Table 35 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025  
Table 36 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025  
Table 37 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025  
Table 38 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025  
Table 39 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030  
Table 40 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030  
Table 41 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030  
Table 42 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030  
Table 43 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030  
Table 44 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030  
Table 45 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030  
Table 46 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030  
Table 47 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030  
Table 48 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

## APPENDIX

Fountain sales in Indonesia

## 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/juice-in-indonesia/report](http://www.euromonitor.com/juice-in-indonesia/report).