



Euromonitor
International

Dairy Products and Alternatives in Indonesia

August 2025

Table of Contents

EXECUTIVE SUMMARY

Dairy products and alternatives in 2025: The big picture

Key trends in 2025

Competitive Landscape

Channel developments

What next for dairy products and alternatives?

MARKET DATA

Table 1 - Sales of Dairy Products and Alternatives by Category: Value 2020-2025

Table 2 - Sales of Dairy Products and Alternatives by Category: % Value Growth 2020-2025

Table 3 - NBO Company Shares of Dairy Products and Alternatives: % Value 2021-2025

Table 4 - LBN Brand Shares of Dairy Products and Alternatives: % Value 2022-2025

Table 5 - Penetration of Private Label by Category: % Value 2020-2025

Table 6 - Distribution of Dairy Products and Alternatives by Format: % Value 2020-2025

Table 7 - Forecast Sales of Dairy Products and Alternatives by Category: Value 2025-2030

Table 8 - Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2025-2030

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby Food in Indonesia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Government efforts help push growth in baby food in 2025

Sarihusada leads through its SGM brand as Yummy Bites enjoys rapid rises

Convenience stores as favoured channel for baby food purchases in Indonesia

PROSPECTS AND OPPORTUNITIES

Baby food faces strong value growth for forecast period

Rising health awareness will drive development

Tightened regulations and local players set to shape progress

CATEGORY DATA

Table 9 - Sales of Baby Food by Category: Volume 2020-2025

Table 10 - Sales of Baby Food by Category: Value 2020-2025

Table 11 - Sales of Baby Food by Category: % Volume Growth 2020-2025

Table 12 - Sales of Baby Food by Category: % Value Growth 2020-2025

Table 13 - Sales of Growing-Up Milk Formula by Age: % Value 2020-2025

Table 14 - NBO Company Shares of Baby Food: % Value 2021-2025

Table 15 - LBN Brand Shares of Baby Food: % Value 2022-2025

Table 16 - Distribution of Baby Food by Format: % Value 2020-2025

Table 17 - Forecast Sales of Baby Food by Category: Volume 2025-2030

Table 18 - Forecast Sales of Baby Food by Category: Value 2025-2030

Table 19 - Forecast Sales of Baby Food by Category: % Volume Growth 2025-2030

Table 20 - Forecast Sales of Baby Food by Category: % Value Growth 2025-2030

Butter and Spreads in Indonesia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Butter and spreads sees slowed growth in 2025

Upfield leads with popular Blue Band brand

Small local grocers remains favoured channel as convenience stores continues to expand

PROSPECTS AND OPPORTUNITIES

Further strong growth forecast for butter and spreads

Functional, plant-based and other health claims set to become more prevalent

Tighter regulations and social media trends will continue to impact evolution

CATEGORY DATA

Table 21 - Sales of Butter and Spreads by Category: Volume 2020-2025

Table 22 - Sales of Butter and Spreads by Category: Value 2020-2025

Table 23 - Sales of Butter and Spreads by Category: % Volume Growth 2020-2025

Table 24 - Sales of Butter and Spreads by Category: % Value Growth 2020-2025

Table 25 - NBO Company Shares of Butter and Spreads: % Value 2021-2025

Table 26 - LBN Brand Shares of Butter and Spreads: % Value 2022-2025

Table 27 - Distribution of Butter and Spreads by Format: % Value 2020-2025

Table 28 - Forecast Sales of Butter and Spreads by Category: Volume 2025-2030

Table 29 - Forecast Sales of Butter and Spreads by Category: Value 2025-2030

Table 30 - Forecast Sales of Butter and Spreads by Category: % Volume Growth 2025-2030

Table 31 - Forecast Sales of Butter and Spreads by Category: % Value Growth 2025-2030

Cheese in Indonesia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Cheese benefits from rising consumer awareness despite ongoing economic uncertainty

Kraft continues to lead, investing heavily in promotional events

Supermarkets leads distribution though is ceding share to convenience stores

PROSPECTS AND OPPORTUNITIES

Cheese will see strong value growth in Indonesia throughout the forecast period

Health and wellness trends remain critical influences on category development

Regulation and certification promote healthier choices among consumers

CATEGORY DATA

Table 32 - Sales of Cheese by Category: Volume 2020-2025

Table 33 - Sales of Cheese by Category: Value 2020-2025

Table 34 - Sales of Cheese by Category: % Volume Growth 2020-2025

Table 35 - Sales of Cheese by Category: % Value Growth 2020-2025

Table 36 - Sales of Spreadable Cheese by Type: % Value 2020-2025

Table 37 - Sales of Soft Cheese by Type: % Value 2020-2025

Table 38 - Sales of Hard Cheese by Type: % Value 2020-2025

Table 39 - NBO Company Shares of Cheese: % Value 2021-2025

Table 40 - LBN Brand Shares of Cheese: % Value 2022-2025

Table 41 - Distribution of Cheese by Format: % Value 2020-2025

Table 42 - Forecast Sales of Cheese by Category: Volume 2025-2030

Table 43 - Forecast Sales of Cheese by Category: Value 2025-2030

Table 44 - Forecast Sales of Cheese by Category: % Volume Growth 2025-2030

Table 45 - Forecast Sales of Cheese by Category: % Value Growth 2025-2030

Drinking Milk Products in Indonesia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Slowed growth sustained by government programme
Ultrajaya leads, benefiting from trust and innovative efforts
Small local grocers as most popular channel, with e-commerce rising fastest

PROSPECTS AND OPPORTUNITIES

Drinking milk to continue to benefit from raised awareness
Health concerns as central to purchasing decisions
Digital campaigns will remain critical growth-builders

CATEGORY DATA

Table 46 - Sales of Drinking Milk Products by Category: Volume 2020-2025
Table 47 - Sales of Drinking Milk Products by Category: Value 2020-2025
Table 48 - Sales of Drinking Milk Products by Category: % Volume Growth 2020-2025
Table 49 - Sales of Drinking Milk Products by Category: % Value Growth 2020-2025
Table 50 - NBO Company Shares of Drinking Milk Products: % Value 2021-2025
Table 51 - LBN Brand Shares of Drinking Milk Products: % Value 2022-2025
Table 52 - Distribution of Drinking Milk Products by Format: % Value 2020-2025
Table 53 - Forecast Sales of Drinking Milk Products by Category: Volume 2025-2030
Table 54 - Forecast Sales of Drinking Milk Products by Category: Value 2025-2030
Table 55 - Forecast Sales of Drinking Milk Products by Category: % Volume Growth 2025-2030
Table 56 - Forecast Sales of Drinking Milk Products by Category: % Value Growth 2025-2030

Yoghurt and Sour Milk Products in Indonesia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Solid growth driven by increased accessibility and affordability
Yakult leads while Heavenly Nutrition rises fastest
Direct selling accounts for most sales in yoghurt

PROSPECTS AND OPPORTUNITIES

Rapid rises predicted for yoghurt and sour milk products
Healthy options continue to expand
Digital engagement becomes increasingly important to push sales

CATEGORY DATA

Table 57 - Sales of Yoghurt and Sour Milk Products by Category: Volume 2020-2025
Table 58 - Sales of Yoghurt and Sour Milk Products by Category: Value 2020-2025
Table 59 - Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2020-2025
Table 60 - Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2020-2025
Table 61 - Sales of Flavoured Yoghurt by Flavour: Rankings 2020-2025
Table 62 - NBO Company Shares of Yoghurt and Sour Milk Products: % Value 2021-2025
Table 63 - LBN Brand Shares of Yoghurt and Sour Milk Products: % Value 2022-2025
Table 64 - Distribution of Yoghurt and Sour Milk Products by Format: % Value 2020-2025
Table 65 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Volume 2025-2030
Table 66 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Value 2025-2030
Table 67 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2025-2030
Table 68 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2025-2030

Other Dairy in Indonesia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Other dairy sees slowed value growth in 2025, with cream rising fastest
Frisian Flag continues to lead overall other dairy in Indonesia
As e-commerce expands further, small local grocers remains primary distribution channel

PROSPECTS AND OPPORTUNITIES

Condensed milk set to expand and help drive further steady growth for other dairy
Health and wellness concerns will have increased impact on development
Social media as critical growth driver

CATEGORY DATA

Table 69 - Sales of Other Dairy by Category: Volume 2020-2025
Table 70 - Sales of Other Dairy by Category: Value 2020-2025
Table 71 - Sales of Other Dairy by Category: % Volume Growth 2020-2025
Table 72 - Sales of Other Dairy by Category: % Value Growth 2020-2025
Table 73 - Sales of Cream by Type: % Value 2020-2025
Table 74 - NBO Company Shares of Other Dairy: % Value 2021-2025
Table 75 - LBN Brand Shares of Other Dairy: % Value 2022-2025
Table 76 - Distribution of Other Dairy by Format: % Value 2020-2025
Table 77 - Forecast Sales of Other Dairy by Category: Volume 2025-2030
Table 78 - Forecast Sales of Other Dairy by Category: Value 2025-2030
Table 79 - Forecast Sales of Other Dairy by Category: % Volume Growth 2025-2030
Table 80 - Forecast Sales of Other Dairy by Category: % Value Growth 2025-2030

Plant-Based Dairy in Indonesia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Plant-based dairy records robust rises
Heinz still ahead of the rest, with Float Oat seeing further growth
Small local grocers remains biggest distribution channel in 2025

PROSPECTS AND OPPORTUNITIES

Forecast period will see persistent strong growth for plant-based dairy in Indonesia
Plant-based milk set to benefit from improved awareness
Flavour innovation will help fuel future growth

CATEGORY DATA

Table 81 - Sales of Plant-Based Dairy by Category: Value 2020-2025
Table 82 - Sales of Plant-Based Dairy by Category: % Value Growth 2020-2025
Table 83 - Sales of Other Plant-Based Milk by Type: % Value 2022-2025
Table 84 - NBO Company Shares of Plant-Based Dairy: % Value 2021-2025
Table 85 - LBN Brand Shares of Plant-Based Dairy: % Value 2022-2025
Table 86 - Distribution of Plant-Based Dairy by Format: % Value 2020-2025
Table 87 - Forecast Sales of Plant-Based Dairy by Category: Value 2025-2030
Table 88 - Forecast Sales of Plant-Based Dairy by Category: % Value Growth 2025-2030

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/dairy-products-and-alternatives-in-indonesia/report.