

Health and Wellness in Indonesia

November 2023

Table of Contents

EXECUTIVE SUMMARY

Overview

DISCLAIMER

HW Hot Drinks in Indonesia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Mixed fortunes for sugar-related claims in coffee and other hot drinks
Natural still the leading health and wellness claim by value but overall sales decline
No caffeine, no problem

PROSPECTS AND OPPORTUNITIES

Interest in plant-based, lactose free and dairy free hot drinks set to rise
Increasingly busy lifestyles should broaden appeal of energy boosting hot drinks
Positive outlook for vegetarian claims

CATEGORY DATA

Table 1 - Sales of Hot Drinks by Health and Wellness Type: Value 2019-2022
Table 2 - Sales of Hot Drinks by Health and Wellness Type: % Value Growth 2019-2022
Table 3 - Company Shares of Organic Hot Drinks (Biggest HW Type in Global Hot Drinks): % Value 2019-2022
Table 4 - Company Shares of Natural Hot Drinks (2nd Biggest HW Type in Global Hot Drinks): % Value 2019-2022
Table 5 - Company Shares of Gluten Free Hot Drinks (3rd Biggest HW Type in Global Hot Drinks): % Value 2019-2022
Table 6 - Company Shares of Good Source of Vitamins Hot Drinks (4th Biggest HW Type in Global Hot Drinks): % Value 2019-2022
Table 7 - Company Shares of No Allergens Hot Drinks (5th Biggest HW Type in Global Hot Drinks): % Value 2019-2022
Table 8 - Forecast Sales of Hot Drinks by Health and Wellness Type: Value 2022-2027
Table 9 - Forecast Sales of Hot Drinks by Health and Wellness Type: % Value Growth 2022-2027

HW Soft Drinks in Indonesia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Soft drinks with added functional ingredients continue to gain popularity in Indonesia
Natural still the leading health and wellness claim in value terms despite declining sales
Immune support is the fastest growing claim in volume and value terms

PROSPECTS AND OPPORTUNITIES

Interest in soft drinks with beauty-oriented claims expected to rise
Good source of minerals poised to become the leading claim in value terms
Rising health-consciousness to benefit interest in organic produce

CATEGORY DATA

Table 10 - Sales of Soft Drinks by Health and Wellness Type: Value 2019-2022
Table 11 - Sales of Soft Drinks by Health and Wellness Type: % Value Growth 2019-2022
Table 12 - Company Shares of No Sugar Soft Drinks (Biggest HW Type in Global Soft Drinks): % Value 2019-2022
Table 13 - Company Shares of Energy Boosting Soft Drinks (2nd Biggest HW Type in Global Soft Drinks): % Value 2019-2022
Table 14 - Company Shares of Natural Soft Drinks (3rd Biggest HW Type in Global Soft Drinks): % Value 2019-2022
Table 15 - Company Shares of Good Source of Vitamins Soft Drinks (4th Biggest HW Type in Global Soft Drinks): % Value 2019-2022
Table 16 - Company Shares of Gluten Free Soft Drinks (5th Biggest HW Type in Global Soft Drinks): % Value 2019-2022
Table 17 - Forecast Sales of Soft Drinks by Health and Wellness Type: Value 2022-2027

Table 18 - Forecast Sales of Soft Drinks by Health and Wellness Type: % Value Growth 2022-2027

HW Snacks in Indonesia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Rising health-consciousness continues to buoy demand for “clean label” snacks

Good source of vitamins still the leading health and wellness claim in snacks

Brain health and memory driven by ageing population

PROSPECTS AND OPPORTUNITIES

Interest in functional claims related to beauty and personal appearance set to rise

Good source of vitamins will remain the leading health and wellness claim

Growth potential for vegan claims

CATEGORY DATA

Table 19 - Sales of Snacks by Health and Wellness Type: Value 2019-2022

Table 20 - Sales of Snacks by Health and Wellness Type: % Value Growth 2019-2022

Table 21 - Company Shares of Gluten Free Snacks (Biggest HW Type in Global Snacks): % Value 2019-2022

Table 22 - Company Shares of Vegetarian Snacks (2nd Biggest HW Type in Global Snacks): % Value 2019-2022

Table 23 - Company Shares of Organic Snacks (3rd Biggest HW Type in Global Snacks): % Value 2019-2022

Table 24 - Company Shares of Vegan Snacks (4th Biggest HW Type in Global Snacks): % Value 2019-2022

Table 25 - Company Shares of No Allergens Snacks (5th Biggest HW Type in Global Snacks): % Value 2019-2022

Table 26 - Forecast Sales of Snacks by Health and Wellness Type: Value 2022-2027

Table 27 - Forecast Sales of Snacks by Health and Wellness Type: % Value Growth 2022-2027

HW Dairy Products and Alternatives in Indonesia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Interest in plant-based dairy products and alternatives remains strong

Good source of minerals still the leading health and wellness claim

Rising interest in skin health

PROSPECTS AND OPPORTUNITIES

Availability of and demand for lactose free dairy products and alternatives set to rise

Good source of minerals will remain the leading claim by some distance

Gains expected for vegetarian products

CATEGORY DATA

Table 28 - Sales of Dairy Products and Alternatives by Health and Wellness Type: Value 2019-2022

Table 29 - Sales of Dairy Products and Alternatives by Health and Wellness Type: % Value Growth 2019-2022

Table 30 - Company Shares of Organic Dairy Products and Alternatives (Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-2022

Table 31 - Company Shares of Good Source of Minerals Dairy Products and Alternatives (2nd Biggest HW Type in Global Dairy Products and Alternatives): % V

Table 32 - Company Shares of Gluten Free Dairy Products and Alternatives (3rd Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-20

Table 33 - Company Shares of Lactose Free Dairy Products and Alternatives (4th Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-2

Table 34 - Company Shares of Low Fat Dairy Products and Alternatives (5th Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-2022

Table 35 - Forecast Sales of Dairy Products and Alternatives by Health and Wellness Type: Value 2022-2027

Table 36 - Forecast Sales of Dairy Products and Alternatives by Health and Wellness Type: % Value Growth 2022-2027

HW Cooking Ingredients and Meals in Indonesia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Health and wellness products made with local herbs and spices gain popularity

Natural still the leading health and wellness claim but overall sales decline

Positive growth for digestive health claim

PROSPECTS AND OPPORTUNITIES

Plant-based options will benefit from health, environmental and animal welfare concerns

Natural set to remain the leading health and wellness claim

Clear potential in vegan claims

CATEGORY DATA

Table 37 - Sales of Cooking Ingredients and Meals by Health and Wellness Type: Value 2019-2022

Table 38 - Sales of Cooking Ingredients and Meals by Health and Wellness Type: % Value Growth 2019-2022

Table 39 - Company Shares of Organic Cooking Ingredients and Meals (Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

Table 40 - Company Shares of Gluten Free Cooking Ingredients and Meals (2nd Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

Table 41 - Company Shares of Vegetarian Cooking Ingredients and Meals (3rd Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

Table 42 - Company Shares of Vegan Cooking Ingredients and Meals (4th Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

Table 43 - Company Shares of Natural Cooking Ingredients and Meals (5th Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

Table 44 - Forecast Sales of Cooking Ingredients and Meals by Health and Wellness Type: Value 2022-2027

Table 45 - Forecast Sales of Cooking Ingredients and Meals by Health and Wellness Type: % Value Growth 2022-2027

HW Staple Foods in Indonesia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Konyaku-based rice and noodles continue to gain popularity among Indonesians

Good source of minerals still the leading health and wellness claim in staple foods

New dietary preferences see positive growth for plant-based claims

PROSPECTS AND OPPORTUNITIES

Portion control trend likely to gain momentum as obesity concerns rise

Good source of minerals set to remain the leading health and wellness claim

Vegan poised to be among the fastest growing claims in volume and value terms

CATEGORY DATA

Table 46 - Sales of Staple Foods by Health and Wellness Type: Value 2019-2022

Table 47 - Sales of Staple Foods by Health and Wellness Type: % Value Growth 2019-2022

Table 48 - Company Shares of Gluten Free Staple Foods (Biggest HW Type in Global Staple Foods): % Value 2019-2022

Table 49 - Company Shares of Organic Staple Foods (2nd Biggest HW Type in Global Staple Foods): % Value 2019-2022

Table 50 - Company Shares of High Fibre Staple Foods (3rd Biggest HW Type in Global Staple Foods): % Value 2019-2022

Table 51 - Company Shares of Vegetarian Staple Foods (4th Biggest HW Type in Global Staple Foods): % Value 2019-2022

Table 52 - Company Shares of No Allergens Staple Foods (5th Biggest HW Type in Global Staple Foods): % Value 2019-2022

Table 53 - Forecast Sales of Staple Foods by Health and Wellness Type: Value 2022-2027

Table 54 - Forecast Sales of Staple Foods by Health and Wellness Type: % 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/health-and-wellness-in-indonesia/report.