

# Snacks in Indonesia

June 2023

Table of Contents

## Snacks in Indonesia

### EXECUTIVE SUMMARY

Snacks in 2023: The big picture

Key trends in 2023

Competitive Landscape

Channel developments

What next for snacks?

### MARKET DATA

Table 1 - Sales of Snacks by Category: Volume 2018-2023

Table 2 - Sales of Snacks by Category: Value 2018-2023

Table 3 - Sales of Snacks by Category: % Volume Growth 2018-2023

Table 4 - Sales of Snacks by Category: % Value Growth 2018-2023

Table 5 - NBO Company Shares of Snacks: % Value 2019-2023

Table 6 - LBN Brand Shares of Snacks: % Value 2020-2023

Table 7 - Distribution of Snacks by Format: % Value 2018-2023

Table 8 - Forecast Sales of Snacks by Category: Volume 2023-2028

Table 9 - Forecast Sales of Snacks by Category: Value 2023-2028

Table 10 - Forecast Sales of Snacks by Category: % Volume Growth 2023-2028

Table 11 - Forecast Sales of Snacks by Category: % Value Growth 2023-2028

### DISCLAIMER

### SOURCES

Summary 1 - Research Sources

## Chocolate Confectionery in Indonesia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Companies leverage digital marketing to target younger consumers

Chocolate confectionery fails to join the quick commerce ride

Post-pandemic lifestyles drive the sales of chocolate pouches and bags, while chocolate with toys maintains recovery

### PROSPECTS AND OPPORTUNITIES

Small- and medium-sized businesses pose a threat to seasonal chocolate confectionery

Health and wellness trends and on-the-go lifestyles tipped to inspire smaller pack sizes

New product developments and sustainable farming drive growth for chocolate confectionery

### CATEGORY DATA

Summary 2 - Other Chocolate Confectionery by Product Type: 2022

Table 12 - Sales of Chocolate Confectionery by Category: Volume 2018-2023

Table 13 - Sales of Chocolate Confectionery by Category: Value 2018-2023

Table 14 - Sales of Chocolate Confectionery by Category: % Volume Growth 2018-2023

Table 15 - Sales of Chocolate Confectionery by Category: % Value Growth 2018-2023

Table 16 - Sales of Chocolate Tablets by Type: % Value 2018-2023

Table 17 - NBO Company Shares of Chocolate Confectionery: % Value 2019-2023

Table 18 - LBN Brand Shares of Chocolate Confectionery: % Value 2020-2023

Table 19 - Distribution of Chocolate Confectionery by Format: % Value 2018-2023

Table 20 - Forecast Sales of Chocolate Confectionery by Category: Volume 2023-2028

Table 21 - Forecast Sales of Chocolate Confectionery by Category: Value 2023-2028

Table 22 - Forecast Sales of Chocolate Confectionery by Category: % Volume Growth 2023-2028

## Table 23 - Forecast Sales of Chocolate Confectionery by Category: % Value Growth 2023-2028

### Gum in Indonesia

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Distribution channel penetration crucial for gum sales, as convenience stores widen their reach  
Perfetti Van Melle Indonesia maintains its leading position in gum  
Maturity of category limits innovation opportunities – other than those seen in “healthier” variants

##### PROSPECTS AND OPPORTUNITIES

Post-pandemic lifestyles will continue to support sales in gum over the forecast period  
Gum performance is associated with the smoking culture in Indonesia  
Sugar-free remains the big trend in gum

#### CATEGORY DATA

Table 24 - Sales of Gum by Category: Volume 2018-2023  
Table 25 - Sales of Gum by Category: Value 2018-2023  
Table 26 - Sales of Gum by Category: % Volume Growth 2018-2023  
Table 27 - Sales of Gum by Category: % Value Growth 2018-2023  
Table 28 - Sales of Gum by Flavour: Rankings 2018-2023  
Table 29 - NBO Company Shares of Gum: % Value 2019-2023  
Table 30 - LBN Brand Shares of Gum: % Value 2020-2023  
Table 31 - Distribution of Gum by Format: % Value 2018-2023  
Table 32 - Forecast Sales of Gum by Category: Volume 2023-2028  
Table 33 - Forecast Sales of Gum by Category: Value 2023-2028  
Table 34 - Forecast Sales of Gum by Category: % Volume Growth 2023-2028  
Table 35 - Forecast Sales of Gum by Category: % Value Growth 2023-2028

### Sugar Confectionery in Indonesia

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Health awareness among consumers influences performance of sugar confectionery  
General trade remains the most common distribution channel for sugar confectionery  
Mayora Indah maintains its lead in sugar confectionery

##### PROSPECTS AND OPPORTUNITIES

E-commerce expected to benefit sales of sugar confectionery over the forecast period  
Anticipation of economy slowdown may drive brand owners to make adjustments  
Cross-category collaboration drives unique selling points for Fox's

#### CATEGORY DATA

Summary 3 - Other Sugar Confectionery by Product Type: 2023  
Table 36 - Sales of Sugar Confectionery by Category: Volume 2018-2023  
Table 37 - Sales of Sugar Confectionery by Category: Value 2018-2023  
Table 38 - Sales of Sugar Confectionery by Category: % Volume Growth 2018-2023  
Table 39 - Sales of Sugar Confectionery by Category: % Value Growth 2018-2023  
Table 40 - Sales of Pastilles, Gummies, Jellies and Chews by Type: % Value 2018-2023  
Table 41 - NBO Company Shares of Sugar Confectionery: % Value 2019-2023  
Table 42 - LBN Brand Shares of Sugar Confectionery: % Value 2020-2023  
Table 43 - Distribution of Sugar Confectionery by Format: % Value 2018-2023

Table 44 - Forecast Sales of Sugar Confectionery by Category: Volume 2023-2028

Table 45 - Forecast Sales of Sugar Confectionery by Category: Value 2023-2028

Table 46 - Forecast Sales of Sugar Confectionery by Category: % Volume Growth 2023-2028

Table 47 - Forecast Sales of Sugar Confectionery by Category: % Value Growth 2023-2028

## Ice Cream in Indonesia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Unilever holds the top company spot due to strong portfolio, while Aice from Alpen Food Industry remains the most popular brand

Single portion ice cream register the fastest growth in Indonesia market

Brand Glico Wings sees a strong performance thanks to Japanese influence

#### PROSPECTS AND OPPORTUNITIES

Further development of Q-commerce is likely to positively benefit ice cream sales

Sales of take-home ice cream set for low growth over the forecast period

Creative new product launch is stimulating the ice cream industry in Indonesia

#### CATEGORY DATA

Table 48 - Sales of Ice Cream by Category: Volume 2018-2023

Table 49 - Sales of Ice Cream by Category: Value 2018-2023

Table 50 - Sales of Ice Cream by Category: % Volume Growth 2018-2023

Table 51 - Sales of Ice Cream by Category: % Value Growth 2018-2023

Table 52 - Sales of Ice Cream by Leading Flavours: Rankings 2018-2023

Table 53 - Sales of Impulse Ice Cream by Format: % Value 2018-2023

Table 54 - NBO Company Shares of Ice Cream: % Value 2019-2023

Table 55 - LBN Brand Shares of Ice Cream: % Value 2020-2023

Table 56 - NBO Company Shares of Impulse Ice Cream: % Value 2019-2023

Table 57 - LBN Brand Shares of Impulse Ice Cream: % Value 2020-2023

Table 58 - NBO Company Shares of Take-home Ice Cream: % Value 2019-2023

Table 59 - LBN Brand Shares of Take-home Ice Cream: % Value 2020-2023

Table 60 - Distribution of Ice Cream by Format: % Value 2018-2023

Table 61 - Forecast Sales of Ice Cream by Category: Volume 2023-2028

Table 62 - Forecast Sales of Ice Cream by Category: Value 2023-2028

Table 63 - Forecast Sales of Ice Cream by Category: % Volume Growth 2023-2028

Table 64 - Forecast Sales of Ice Cream by Category: % Value Growth 2023-2028

## Savoury Snacks in Indonesia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Garudafood Group maintains its lead in savoury snacks with its top Garuda brand

Puff snacks continues to recover from volume declines, while value is supported by higher unit prices

E-commerce sales boost the performance of savoury snacks in Indonesia

#### PROSPECTS AND OPPORTUNITIES

Vegetable, pulse, and bread chips gain popularity as health and wellness trends continue

Social media becomes the source of product information for consumers

Players relaunch successful limited-editions to stimulate sales

#### CATEGORY DATA

Summary 4 - Other Savoury Snacks by Product Type: 2023

Table 65 - Sales of Savoury Snacks by Category: Volume 2018-2023  
 Table 66 - Sales of Savoury Snacks by Category: Value 2018-2023  
 Table 67 - Sales of Savoury Snacks by Category: % Volume Growth 2018-2023  
 Table 68 - Sales of Savoury Snacks by Category: % Value Growth 2018-2023  
 Table 69 - NBO Company Shares of Savoury Snacks: % Value 2019-2023  
 Table 70 - LBN Brand Shares of Savoury Snacks: % Value 2020-2023  
 Table 71 - Distribution of Savoury Snacks by Format: % Value 2018-2023  
 Table 72 - Forecast Sales of Savoury Snacks by Category: Volume 2023-2028  
 Table 73 - Forecast Sales of Savoury Snacks by Category: Value 2023-2028  
 Table 74 - Forecast Sales of Savoury Snacks by Category: % Volume Growth 2023-2028  
 Table 75 - Forecast Sales of Savoury Snacks by Category: % Value Growth 2023-2028

## Sweet Biscuits, Snack Bars and Fruit Snacks in Indonesia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Mayora Indah Tbk PT maintains its lead in sweet biscuits, snack bars and fruit snacks  
 Category benefits from rise in e-commerce, with SMEs also playing a vital role  
 Health and wellness trends influence drivers in sweet biscuits, snack bars, and fruit snacks

#### PROSPECTS AND OPPORTUNITIES

Snacks bars' performance is associated with increase in health and wellness awareness  
 Wafers is expected to have positive outlook in the forecast period  
 Q-commerce set to support sales in the category over the forecast period

#### CATEGORY DATA

Table 76 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2018-2023  
 Table 77 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2018-2023  
 Table 78 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2018-2023  
 Table 79 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2018-2023  
 Table 80 - NBO Company Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2019-2023  
 Table 81 - LBN Brand Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2020-2023  
 Table 82 - NBO Company Shares of Sweet Biscuits: % Value 2019-2023  
 Table 83 - LBN Brand Shares of Sweet Biscuits: % Value 2020-2023  
 Table 84 - NBO Company Shares of Snack Bars: % Value 2019-2023  
 Table 85 - LBN Brand Shares of Snack Bars: % Value 2020-2023  
 Table 86 - NBO Company Shares of Fruit Snacks: % Value 2019-2023  
 Table 87 - LBN Brand Shares of Fruit Snacks: % Value 2020-2023  
 Table 88 - Distribution of Sweet Biscuits, Snack Bars and Fruit Snacks by Format: % Value 2018-2023  
 Table 89 - Distribution of Sweet Biscuits by Format: % Value 2018-2023  
 Table 90 - Distribution of Snack Bars by Format: % Value 2018-2023  
 Table 91 - Distribution of Fruit Snacks by Format: % Value 2018-2023  
 Table 92 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2023-2028  
 Table 93 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2023-2028  
 Table 94 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2023-2028  
 Table 95 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2023-2028

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