



Euromonitor
International

Carbonates in Indonesia

November 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Navigating sales decline, reduced sugar growth, and channel shifts

INDUSTRY PERFORMANCE

Carbonates remains under pressure due to a number of factors

Rising health concerns drive dynamic growth of reduced sugar carbonates

WHAT'S NEXT?

Further downwards pressure on carbonates but reduced sugar options will continue to make gains

Players look to redesign packaging and launch new flavours to attract consumers

Potential impact of impending sugar tax in Indonesia

COMPETITIVE LANDSCAPE

Coca-Cola retains dominance of carbonates with wide portfolio and discounts

Local brand continues to make significant gains in lemonade/lime

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Small local grocers strengthens dominance as distribution channel for carbonates

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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

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