



Juice in Indonesia

November 2025

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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

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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

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