

Alcoholic Drinks in Indonesia

Market Direction | 2022-07-07 | 77 pages | Euromonitor

AVAILABLE LICENSES:

- Single User Licence €1750.00
- Multiple User License (1 Site) €3500.00
- Multiple User License (Global) €5250.00

Report description:

Sales of alcoholic drinks in Indonesia were severely impacted by the COVID-19 pandemic during 2020, with off-trade and on-trade volume sales plummeting. The Indonesian government's movement restrictions, most notably under the auspices of the PSBB social control measures, and the subsequent shutdown of the entire hospitality industry for an extended period placed strong limits on on-trade sales. In addition to the requirement for all bars, pubs, nightclubs, restaurants and cafes to remain closed...

Euromonitor International's Alcoholic Drinks in Indonesia report offers a comprehensive guide to the size and shape of the market at a national level. It provides the latest retail sales data (2017-2021), allowing you to identify the sectors driving growth. It identifies the leading companies, the leading brands and offers strategic analysis of key factors influencing the market - be they legislative, distribution or pricing issues. Forecasts to 2026 illustrate how the market is set to change.

Product coverage: Beer, Cider/Perry, RTDs, Spirits, Wine.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

Why buy this report?

- * Get a detailed picture of the Alcoholic Drinks market;
- * Pinpoint growth sectors and identify factors driving change;
- * Understand the competitive environment, the market's major players and leading brands;
- * Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop reliable information resources to help drive informed strategic planning.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table of Contents:

Alcoholic Drinks in Indonesia
Euromonitor International
July 2022

List Of Contents And Tables

ALCOHOLIC DRINKS IN INDONESIA

EXECUTIVE SUMMARY

Alcoholic drinks in 2021: The big picture

2021 key trends

Competitive landscape

Retailing developments

On-trade vs off-trade split

What next for alcoholic drinks?

CHART 1 Alcoholic Drinks Off-Trade Volume Sales Growth Scenarios: 2019-2026

CHART 2 Alcoholic Drinks On-Trade Volume Sales Growth Scenarios: 2019-2026

CHART 3 Alcoholic Drinks Impact of Soft Drivers on Off-Trade Volume Sales: 2019-2026

CHART 4 Alcoholic Drinks Impact of Soft Drivers on On-Trade Volume Sales: 2019-2026

MARKET BACKGROUND

Legislation

Legal purchasing age and legal drinking age

Drink driving

Advertising

Smoking ban

Opening hours

On-trade establishments

Table 1 Number of On-trade Establishments by Type 2015-2021

Taxation and Duty Levies

Summary 1 Taxation and Duty Levies on Alcoholic Drinks 2021

OPERATING ENVIRONMENT

Contraband/parallel trade

Duty free

Cross-border/private imports

KEY NEW PRODUCT LAUNCHES

Outlook

MARKET INDICATORS

Table 2 Retail Consumer Expenditure on Alcoholic Drinks 2016-2021

MARKET DATA

Table 3 Sales of Alcoholic Drinks by Category: Total Volume 2016-2021

Table 4 Sales of Alcoholic Drinks by Category: Total Value 2016-2021

Table 5 Sales of Alcoholic Drinks by Category: % Total Volume Growth 2016-2021

Table 6 Sales of Alcoholic Drinks by Category: % Total Value Growth 2016-2021

Table 7 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2021

Table 8 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2021

Table 9 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2021

Table 10 □Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2021

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 11 □GBO Company Shares of Alcoholic Drinks: % Total Volume 2017-2021
Table 12 □Distribution of Alcoholic Drinks by Format: % Off-trade Value 2016-2021
Table 13 □Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2021
Table 14 □Forecast Sales of Alcoholic Drinks by Category: Total Volume 2021-2026
Table 15 □Forecast Sales of Alcoholic Drinks by Category: Total Value 2021-2026
Table 16 □Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2021-2026
Table 17 □Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2021-2026

DISCLAIMER

SOURCES

Summary 2 Research Sources

BEER IN INDONESIA

KEY DATA FINDINGS

2021 DEVELOPMENTS

Both on-trade and off-trade sales on the path to recovery

Multi Bintang Indonesia Tbk PT retains its dominance thanks to investment in new product development and marketing

Craft beer gaining influence as Kura Kura Brewery launches two locally-produced beer variants

PROSPECTS AND OPPORTUNITIES

On trade performance highly depend on opening of border

E-commerce is likely to continue perform well pandemic recovery

New product launches expected to continue following a localisation strategy

CATEGORY BACKGROUND

Lager price band methodology

Summary 3 Lager by Price Band 2021

Table 18 Number of Breweries 2016-2021

CATEGORY DATA

Table 19 Sales of Beer by Category: Total Volume 2016-2021

Table 20 Sales of Beer by Category: Total Value 2016-2021

Table 21 Sales of Beer by Category: % Total Volume Growth 2016-2021

Table 22 Sales of Beer by Category: % Total Value Growth 2016-2021

Table 23 Sales of Beer by Off-trade vs On-trade: Volume 2016-2021

Table 24 Sales of Beer by Off-trade vs On-trade: Value 2016-2021

Table 25 Sales of Beer by Off-trade vs On-trade: % Volume Growth 2016-2021

Table 26 Sales of Beer by Off-trade vs On-trade: % Value Growth 2016-2021

Table 27 □Sales of Beer by Craft vs Standard 2016-2021

Table 28 □GBO Company Shares of Beer: % Total Volume 2017-2021

Table 29 □NBO Company Shares of Beer: % Total Volume 2017-2021

Table 30 □LBN Brand Shares of Beer: % Total Volume 2018-2021

Table 31 □Forecast Sales of Beer by Category: Total Volume 2021-2026

Table 32 □Forecast Sales of Beer by Category: Total Value 2021-2026

Table 33 □Forecast Sales of Beer by Category: % Total Volume Growth 2021-2026

Table 34 □Forecast Sales of Beer by Category: % Total Value Growth 2021-2026

WINE IN INDONESIA

KEY DATA FINDINGS

2021 DEVELOPMENTS

Orang Tua Group pick up its performance with intensive marketing

Sweet wine gains in popularity due to increased focus on domestic consumption

Polarisation witnessed during the pandemic while e-commerce continues to grow in a legal grey area

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

PROSPECTS AND OPPORTUNITIES

E-commerce offers potential for expansion thanks to wider offer

Fruit and herbal wine set to benefit from strong local appeal

Local brands set to focus on wine education to expand their consumer base

CATEGORY DATA

Table 86 Sales of Wine by Category: Total Volume 2016-2021

Table 87 Sales of Wine by Category: Total Value 2016-2021

Table 88 Sales of Wine by Category: % Total Volume Growth 2016-2021

Table 89 Sales of Wine by Category: % Total Value Growth 2016-2021

Table 90 Sales of Wine by Off-trade vs On-trade: Volume 2016-2021

Table 91 Sales of Wine by Off-trade vs On-trade: Value 2016-2021

Table 92 Sales of Wine by Off-trade vs On-trade: % Volume Growth 2016-2021

Table 93 Sales of Wine by Off-trade vs On-trade: % Value Growth 2016-2021

Table 94 Sales of Still Red Wine by Price Segment: % Off-trade Volume 2016-2021

Table 95 □Sales of Still Rose Wine by Price Segment: % Off-trade Volume 2016-2021

Table 96 □Sales of Still White Wine by Price Segment: % Off-trade Volume 2016-2021

Table 97 □Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2016-2021

Table 98 □GBO Company Shares of Still Light Grape Wine: % Total Volume 2017-2021

Table 99 □NBO Company Shares of Still Light Grape Wine: % Total Volume 2017-2021

Table 100 □LBN Brand Shares of Still Light Grape Wine: % Total Volume 2018-2021

Table 101 □GBO Company Shares of Champagne: % Total Volume 2017-2021

Table 102 □NBO Company Shares of Champagne: % Total Volume 2017-2021

Table 103 □LBN Brand Shares of Champagne: % Total Volume 2018-2021

Table 104 □GBO Company Shares of Other Sparkling Wine: % Total Volume 2017-2021

Table 105 □NBO Company Shares of Other Sparkling Wine: % Total Volume 2017-2021

Table 106 □LBN Brand Shares of Other Sparkling Wine: % Total Volume 2018-2021

Table 107 □GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2017-2021

Table 108 □NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2017-2021

Table 109 □LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2018-2021

Table 110 □GBO Company Shares of Non-grape Wine: % Total Volume 2017-2021

Table 111 □NBO Company Shares of Non-grape Wine: % Total Volume 2017-2021

Table 112 □LBN Brand Shares of Non-grape Wine: % Total Volume 2018-2021

Table 113 □Forecast Sales of Wine by Category: Total Volume 2021-2026

Table 114 □Forecast Sales of Wine by Category: Total Value 2021-2026

Table 115 □Forecast Sales of Wine by Category: % Total Volume Growth 2021-2026

Table 116 □Forecast Sales of Wine by Category: % Total Value Growth 2021-2026

SPIRITS IN INDONESIA

KEY DATA FINDINGS

2021 DEVELOPMENTS

Off-trade performance picks up as consumers embrace mixology and home drinking

Despite the ongoing use of restrictions on-trade sales start to recover in 2021

Gordon's taps into developing trends in Indonesia

PROSPECTS AND OPPORTUNITIES

Shochu/soju attracting interest from local players as demand rises

Price discounting expected to be key to promoting sales of spirits with the off-trade set to take a leading role

E-commerce set for further development with consumers attracted by lower prices and a wider offer

CATEGORY BACKGROUND

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

CATEGORY DATA

Table 35 Sales of Spirits by Category: Total Volume 2016-2021

Table 36 Sales of Spirits by Category: Total Value 2016-2021

Table 37 Sales of Spirits by Category: % Total Volume Growth 2016-2021

Table 38 Sales of Spirits by Category: % Total Value Growth 2016-2021

Table 39 Sales of Spirits by Off-trade vs On-trade: Volume 2016-2021

Table 40 Sales of Spirits by Off-trade vs On-trade: Value 2016-2021

Table 41 Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2016-2021

Table 42 Sales of Spirits by Off-trade vs On-trade: % Value Growth 2016-2021

Table 43 Sales of Dark Rum by Price Platform: % Total Volume 2016-2021

Table 44 □Sales of White Rum by Price Platform: % Total Volume 2016-2021

Table 45 □Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2016-2021

Table 46 □Sales of English Gin by Price Platform: % Total Volume 2016-2021

Table 47 □Sales of Vodka by Price Platform: % Total Volume 2016-2021

Table 48 □Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2016-2021

Table 49 □GBO Company Shares of Spirits: % Total Volume 2017-2021

Table 50 □NBO Company Shares of Spirits: % Total Volume 2017-2021

Table 51 □LBN Brand Shares of Spirits: % Total Volume 2018-2021

Table 52 □Forecast Sales of Spirits by Category: Total Volume 2021-2026

Table 53 □Forecast Sales of Spirits by Category: Total Value 2021-2026

Table 54 □Forecast Sales of Spirits by Category: % Total Volume Growth 2021-2026

Table 55 □Forecast Sales of Spirits by Category: % Total Value Growth 2021-2026

CIDER/PERRY IN INDONESIA

KEY DATA FINDINGS

2021 DEVELOPMENTS

Cider/perry sees small recovery but still faces strong competition from flavoured/mixed lager

Cider/perry has limited appeal in Indonesia due to limited distribution and high prices

Albens hard hit by the pandemic but retains dominance

PROSPECTS AND OPPORTUNITIES

Cider/perry challenge remain the forecast period

The recovery of cider/perry should be supported by the rise of e-commerce and the return of tourism

Cider/perry brands will need to work hard to increase product awareness and expand their distribution reach

CATEGORY DATA

Table 56 Sales of Cider/Perry: Total Volume 2016-2021

Table 57 Sales of Cider/Perry: Total Value 2016-2021

Table 58 Sales of Cider/Perry: % Total Volume Growth 2016-2021

Table 59 Sales of Cider/Perry: % Total Value Growth 2016-2021

Table 60 Sales of Cider/Perry by Off-trade vs On-trade: Volume 2016-2021

Table 61 Sales of Cider/Perry by Off-trade vs On-trade: Value 2016-2021

Table 62 Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2016-2021

Table 63 Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2016-2021

Table 64 GBO Company Shares of Cider/Perry: % Total Volume 2017-2021

Table 65 □NBO Company Shares of Cider/Perry: % Total Volume 2017-2021

Table 66 □LBN Brand Shares of Cider/Perry: % Total Volume 2018-2021

Table 67 □Forecast Sales of Cider/Perry: Total Volume 2021-2026

Table 68 □Forecast Sales of Cider/Perry: Total Value 2021-2026

Table 69 □Forecast Sales of Cider/Perry: % Total Volume Growth 2021-2026

Table 70 □Forecast Sales of Cider/Perry: % Total Value Growth 2021-2026

RTDS IN INDONESIA

KEY DATA FINDINGS

2021 DEVELOPMENTS

RTDs continues to struggle

RTDs faces competition from flavoured/mixed lager and cider/perry

Cocktail trend having a negative impact on demand for RTDs

PROSPECTS AND OPPORTUNITIES

E-commerce could offer some hope for the development of RTDs

Soju set to pose stiff competition against RTDs

New product innovations and innovative marketing strategies may help revive RTDs

CATEGORY DATA

Table 71 Sales of RTDs by Category: Total Volume 2016-2021

Table 72 Sales of RTDs by Category: Total Value 2016-2021

Table 73 Sales of RTDs by Category: % Total Volume Growth 2016-2021

Table 74 Sales of RTDs by Category: % Total Value Growth 2016-2021

Table 75 Sales of RTDs by Off-trade vs On-trade: Volume 2016-2021

Table 76 Sales of RTDs by Off-trade vs On-trade: Value 2016-2021

Table 77 Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2016-2021

Table 78 Sales of RTDs by Off-trade vs On-trade: % Value Growth 2016-2021

Table 79 GBO Company Shares of RTDs: % Total Volume 2017-2021

Table 80 □NBO Company Shares of RTDs: % Total Volume 2017-2021

Table 81 □LBN Brand Shares of RTDs: % Total Volume 2018-2021

Table 82 □Forecast Sales of RTDs by Category: Total Volume 2021-2026

Table 83 □Forecast Sales of RTDs by Category: Total Value 2021-2026

Table 84 □Forecast Sales of RTDs by Category: % Total Volume Growth 2021-2026

Table 85 □Forecast Sales of RTDs by Category: % Total Value Growth 2021-2026

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Alcoholic Drinks in Indonesia

Market Direction | 2022-07-07 | 77 pages | Euromonitor

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User Licence	€1750.00
	Multiple User License (1 Site)	€3500.00
	Multiple User License (Global)	€5250.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

☐ ** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2025-05-12"/>
		Signature	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com