

Dairy Products and Alternatives in Indonesia

Market Direction | 2022-09-06 | 75 pages | Euromonitor

AVAILABLE LICENSES:

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

Report description:

All categories in dairy products and alternatives are registering positive growth in 2022, with cheese and yoghurt and sour milk products performing the strongest. This is attributed to consumers seeing slightly improved spending power compared to during the pandemic, alongside home-cooking and baking trends continuing post-pandemic alongside recovery ongoing recovery in foodservice. It is noted that some smaller foodservice vendors do not require large enough quantities to enable them to purcha...

Euromonitor International's Dairy Products and Alternatives in Indonesia report offers in-depth knowledge of the market at a national level, providing local insight and understanding unavailable elsewhere. In addition to the latest retail sales data 2017-2021, it identifies the leading companies, brands and retail outlets, and assesses the key trends and demographic shifts behind consumer demand and sales growth. How key trends such as health and wellness, sustainability and recovery from the pandemic are shaping the market in <|Year|> directly informs our forecasts to 2026, clearly indicating how the market is expected to change.

Product coverage: Baby Food, Dairy, Plant-based Dairy.

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

Why buy this report?

- * Get a detailed picture of the Dairy Products and Alternatives 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

Table of Contents:

Dairy Products and Alternatives in Indonesia Euromonitor International January 2023

List Of Contents And Tables

DAIRY PRODUCTS AND ALTERNATIVES IN INDONESIA

EXECUTIVE SUMMARY

Dairy products and alternatives in 2022: The big picture

Key trends in 2022

Competitive landscape

Channel developments

What next for dairy products and alternatives?

CHART 1 Dairy Products and Alternatives Value Sales Growth Scenarios: 2020-2027 CHART 2 Dairy Products and Alternatives Impact of Drivers on Value Sales: 2020-2027

MARKET DATA

Table 1 Sales of Dairy Products and Alternatives by Category: Value 2017-2022

Table 2 Sales of Dairy Products and Alternatives by Category: % Value Growth 2017-2022

Table 3 NBO Company Shares of Dairy Products and Alternatives: % Value 2018-2022

Table 4 LBN Brand Shares of Dairy Products and Alternatives: % Value 2019-2022

Table 5 Distribution of Dairy Products and Alternatives by Format: % Value 2017-2022

Table 6 Forecast Sales of Dairy Products and Alternatives by Category: Value 2022-2027

Table 7 Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2022-2027

DISCLAIMER

SOURCES

Summary 1 Research Sources

BABY FOOD IN INDONESIA

KEY DATA FINDINGS

2022 DEVELOPMENTS

Sarihusada Generasi Mahardhika PT maintains its lead in baby food, thanks to strength of budget SGM brand

Pack sizes perform differently across distribution channels for baby milk formula

Other baby food gains in popularity as "baby snacks" become more widely available, with healthy positioning and attractive flavours

PROSPECTS AND OPPORTUNITIES

Emerging local brands compete within prepared baby food, thanks to organic and innovative positioning

Dried baby food remains the most prominent type, thanks to low prices and strong local traditions

E-commerce becomes increasingly popular for baby food sales

CATEGORY DATA

Table 8 Sales of Baby Food by Category: Volume 2017-2022

Table 9 Sales of Baby Food by Category: Value 2017-2022

Table 10 Sales of Baby Food by Category: % Volume Growth 2017-2022

Table 11 Sales of Baby Food by Category: % Value Growth 2017-2022

Table 12 Sales of Growing-Up Milk Formula by Age: % Value 2017-2022

Scotts International, EU Vat number: PL 6772247784

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

Table 13 NBO Company Shares of Baby Food: % Value 2018-2022

Table 14 LBN Brand Shares of Baby Food: % Value 2019-2022

Table 15 Distribution of Baby Food by Format: % Value 2017-2022

Table 16 Forecast Sales of Baby Food by Category: Volume 2022-2027

Table 17 ☐ Forecast Sales of Baby Food by Category: Value 2022-2027

Table 18 ☐Forecast Sales of Baby Food by Category: % Volume Growth 2022-2027 Table 19 ☐Forecast Sales of Baby Food by Category: % Value Growth 2022-2027

BUTTER AND SPREADS IN INDONESIA

KEY DATA FINDINGS

2022 DEVELOPMENTS

Upfield Indonesia PT maintains its lead thanks to strength of Blue Band in margarine

Butter and spreads maintain healthy growth thanks to convenience in cooking and a gradually recovering economy overall

New product developments support the growth of butter, but innovations remain niche

PROSPECTS AND OPPORTUNITIES

Demand for butter and spreads in foodservice expected to pick up in the post-pandemic landscape

E-commerce catches up with logistics to support online growth for butter and spreads

Anchor will remain the most prominent butter brand over the forecast period

CATEGORY DATA

Table 20 Sales of Butter and Spreads by Category: Volume 2017-2022

Table 21 Sales of Butter and Spreads by Category: Value 2017-2022

Table 22 Sales of Butter and Spreads by Category: % Volume Growth 2017-2022

Table 23 Sales of Butter and Spreads by Category: % Value Growth 2017-2022

Table 24 NBO Company Shares of Butter and Spreads: % Value 2018-2022

Table 25 LBN Brand Shares of Butter and Spreads: % Value 2019-2022

Table 26 Distribution of Butter and Spreads by Format: % Value 2017-2022

Table 27 Forecast Sales of Butter and Spreads by Category: Volume 2022-2027

Table 28 Forecast Sales of Butter and Spreads by Category: Value 2022-2027

Table 29 ∏Forecast Sales of Butter and Spreads by Category: % Volume Growth 2022-2027

Table 30 ☐Forecast Sales of Butter and Spreads by Category: % Value Growth 2022-2027

CHEESE IN INDONESIA

KEY DATA FINDINGS

2022 DEVELOPMENTS

Cheese slowly grows in popularity, as modern retailers remain the most common distribution channels

Spreadable cheese shows strong growth, thanks to versatility and mild taste

Increased demand for artisanal cheese sees niche variants become available through specialist channels and e-commerce PROSPECTS AND OPPORTUNITIES

Social media cheese trends set to create a cheese-consuming audience

Cheese becomes more prevalent in foodservice, from cheese boards and platters to fusion-inspired menus

Quick commerce trends make e-commerce more attractive for cheese and other dairy

CATEGORY DATA

Table 31 Sales of Cheese by Category: Volume 2017-2022

Table 32 Sales of Cheese by Category: Value 2017-2022

Table 33 Sales of Cheese by Category: % Volume Growth 2017-2022

Table 34 Sales of Cheese by Category: % Value Growth 2017-2022

Table 35 Sales of Spreadable Processed Cheese by Type: % Value 2017-2022

Table 36 Sales of Hard Cheese by Type: % Value 2017-2022 Table 37 NBO Company Shares of Cheese: % Value 2018-2022

Scotts International, EU Vat number: PL 6772247784

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

Table 38 LBN Brand Shares of Cheese: % Value 2019-2022

Table 39 Distribution of Cheese by Format: % Value 2017-2022

Table 40 [Forecast Sales of Cheese by Category: Volume 2022-2027

Table 41 [Forecast Sales of Cheese by Category: Value 2022-2027

Table 42 [Forecast Sales of Cheese by Category: % Volume Growth 2022-2027 Table 43 | Forecast Sales of Cheese by Category: % Value Growth 2022-2027

DRINKING MILK PRODUCTS IN INDONESIA

KEY DATA FINDINGS

2022 DEVELOPMENTS

Nestle Indonesia PT maintains its company lead, thanks to variety of well-known products to suit different tastes Shelf stable milk remains the go-to option, due to a low penetration of household refrigerators in Indonesia PROSPECTS AND OPPORTUNITIES

Demand for fresh milk grows, especially among consumers in larger cities with better infrastructure

Fresh milk faces some competition from milk alternatives, but this remains niche

Drinking milk products also benefits from Quick commerce trends and improved logistics

CATEGORY DATA

Table 44 Sales of Drinking Milk Products by Category: Volume 2017-2022

Table 45 Sales of Drinking Milk Products by Category: Value 2017-2022

Table 46 Sales of Drinking Milk Products by Category: % Volume Growth 2017-2022

Table 47 Sales of Drinking Milk Products by Category: % Value Growth 2017-2022

Table 48 NBO Company Shares of Drinking Milk Products: % Value 2018-2022

Table 49 LBN Brand Shares of Drinking Milk Products: % Value 2019-2022

Table 50 Distribution of Drinking Milk Products by Format: % Value 2017-2022

Table 51 Forecast Sales of Drinking Milk Products Products by Category: Volume 2022-2027

Table 52 Forecast Sales of Drinking Milk Products Products by Category: Value 2022-2027

Table 53 | Forecast Sales of Drinking Milk Products Products by Category: % Volume Growth 2022-2027

Table 54 | Forecast Sales of Drinking Milk Products Products by Category: % Value Growth 2022-2027

YOGHURT AND SOUR MILK PRODUCTS IN INDONESIA

KEY DATA FINDINGS

2022 DEVELOPMENTS

Yakult maintains its notable lead, whilst a growing number of smaller players are attracted to the category

Cimory brand tipped as one to watch, thanks to ongoing innovative launches

Pandemic restrictions supported launch of domestic products in the category

PROSPECTS AND OPPORTUNITIES

Innovative and eye-catching packaging attracts consumers' attention, from convenient pouches to local designs Sugar-free and reduced sugar products become more popular in line with rising health and wellness trends Yoghurt and sour milk products also benefit from Quick commerce developments

CATEGORY DATA

Table 55 Sales of Yoghurt and Sour Milk Products by Category: Volume 2017-2022

Table 56 Sales of Yoghurt and Sour Milk Products by Category: Value 2017-2022

Table 57 Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2017-2022

Table 58 Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2017-2022

Table 59 Sales of Flavoured Yoghurt by Flavour: Rankings 2017-2022

Table 60 NBO Company Shares of Yoghurt and Sour Milk Products: % Value 2018-2022

Table 61 LBN Brand Shares of Yoghurt and Sour Milk Products: % Value 2019-2022

Table 62 Distribution of Yoghurt and Sour Milk Products by Format: % Value 2017-2022

Table 63 Forecast Sales of Yoghurt and Sour Milk Products by Category: Volume 2022-2027

Scotts International, EU Vat number: PL 6772247784

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

Table 64 ☐Forecast Sales of Yoghurt and Sour Milk Products by Category: Value 2022-2027

Table 65 [Forecast Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2022-2027

Table 66 [Forecast Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2022-2027

OTHER DAIRY IN INDONESIA

KEY DATA FINDINGS

2022 DEVELOPMENTS

Condensed milk maintains its popularity among consumers cooking at home, as foodservice sales also recover

Frisian Flag Indonesia PT maintains its lead thanks to strategically placed brands

Coconut milk and whipped cream are the most popular cream products, thanks to multiple culinary uses

PROSPECTS AND OPPORTUNITIES

Coffee whiteners faces strong competition from multiple sources, further disadvantaging a somewhat outdated product

Ongoing recovery of foodservice will continue to support sales in other dairy

Other dairy also sees benefits from Quick commerce developments

CATEGORY DATA

Table 67 Sales of Other Dairy by Category: Volume 2017-2022

Table 68 Sales of Other Dairy by Category: Value 2017-2022

Table 69 Sales of Other Dairy by Category: % Volume Growth 2017-2022

Table 70 Sales of Other Dairy by Category: % Value Growth 2017-2022

Table 71 Sales of Cream by Type: % Value 2017-2022

Table 72 NBO Company Shares of Other Dairy: % Value 2018-2022

Table 73 LBN Brand Shares of Other Dairy: % Value 2019-2022

Table 74 Distribution of Other Dairy by Format: % Value 2017-2022

Table 75 Forecast Sales of Other Dairy by Category: Volume 2022-2027

Table 76 [Forecast Sales of Other Dairy by Category: Value 2022-2027

Table 77 [Forecast Sales of Other Dairy by Category: % Volume Growth 2022-2027

Table 78 [Forecast Sales of Other Dairy by Category: % Value Growth 2022-2027

PLANT-BASED DAIRY IN INDONESIA

KEY DATA FINDINGS

2022 DEVELOPMENTS

Soy drinks remains the most commonly known plant-based dairy in Indonesia

Heinz ABC Indonesia PT leads plant-based dairy in Indonesia, thanks to existing strong logistics and networks

Imported brands in other plant-based milk test strategies via e-commerce before launching in physical stores

PROSPECTS AND OPPORTUNITIES

High pricing remains a block for other plant-based milk, with more affordable soy and mung bean variants the most popular

Social media plays a crucial role in introducing oat milk to consumers, from Instagram to key opinion leaders

Wider usage of other milk alternative in foodservice will also stimulate retail sales, thanks to higher consumer awareness CATEGORY DATA

Table 79 Sales of Plant-Based Dairy by Category: Volume 2017-2022

Table 80 Sales of Plant-Based Dairy by Category: Value 2017-2022

Table 81 Sales of Plant-Based Dairy by Category: % Volume Growth 2017-2022

Table 82 Sales of Plant-Based Dairy by Category: % Value Growth 2017-2022

Table 83 Sales of Other Plant-Based Milk by Type: % Value 2019-2022

Table 84 NBO Company Shares of Plant-Based Dairy: % Value 2018-2022

Table 85 LBN Brand Shares of Plant-Based Dairy: % Value 2019-2022

Table 86 Distribution of Plant-Based Dairy by Format: % Value 2017-2022

Table 87 Forecast Sales of Plant-Based Dairy by Category: Volume 2022-2027

Table 88 [Forecast Sales of Plant-Based Dairy by Category: Value 2022-2027

Scotts International, EU Vat number: PL 6772247784

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

Table 89 ☐Forecast Sales of Plant-Based Dairy by Category: % Volume Growth 2022-2027 Table 90 ☐Forecast Sales of Plant-Based Dairy by Category: % Value Growth 2022-2027

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



☐ - Print this form

To place an Order with Scotts International:

 $\hfill \Box$ - Complete the relevant blank fields and sign

Dairy Products and Alternatives in Indonesia

Market Direction | 2022-09-06 | 75 pages | Euromonitor

☐ - Send as a scan	ned email to support@scotts-intern	ational.com			
ORDER FORM:					
Select license	License				
	Single User Licence			€1750.00	
	Multiple User License (1 Site)	€3500.00			
	Multiple User License (Global)	€5250.00			
			VAT		
			Total		
Email* [First Name* [Job title*	t 23% for Polish based companies, indi	viduals and EU based com Phone* Last Name*	panies who are unable to provide a	valid EU Vat Numb	
Company Name* [EU Vat / Tax ID / NI	P number*		
Address*		City*			
Zip Code*		Country*			
		Date	2025-06-26		
		Signature			

Scotts International. EU Vat number: PL 6772247784

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