

## **Dairy Products and Alternatives in Indonesia**

Market Direction | 2024-08-06 | 74 pages | Euromonitor

### **AVAILABLE LICENSES:**

- Single User Licence €2150.00
- Multiple User License (1 Site) €4300.00
- Multiple User License (Global) €6450.00

### **Report description:**

The market for dairy products and alternatives in Indonesia is set to register healthy growth in total volume terms in 2024, continuing the trend of the previous year. This will be supported by a robust economy, with waning inflationary pressures, rising disposable incomes and increasing urbanisation fuelling consumer demand. As Indonesia's middle class expands, there will be a growing preference for premium and health-oriented options, further driving market diversification and innovation by le...

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 2019-2023, 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 2028, 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

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

reliable information resources to help drive informed strategic planning.

**Table of Contents:**

Dairy Products and Alternatives in Indonesia  
Euromonitor International  
October 2024

List Of Contents And Tables

**DAIRY PRODUCTS AND ALTERNATIVES IN INDONESIA**

**EXECUTIVE SUMMARY**

Dairy products and alternatives in 2024: The big picture  
Key trends in 2024  
Competitive landscape  
Channel developments  
What next for dairy products and alternatives?

**MARKET DATA**

Table 1 Sales of Dairy Products and Alternatives by Category: Value 2019-2024  
Table 2 Sales of Dairy Products and Alternatives by Category: % Value Growth 2019-2024  
Table 3 NBO Company Shares of Dairy Products and Alternatives: % Value 2020-2024  
Table 4 LBN Brand Shares of Dairy Products and Alternatives: % Value 2021-2024  
Table 5 Penetration of Private Label by Category: % Value 2019-2024  
Table 6 Distribution of Dairy Products and Alternatives by Format: % Value 2019-2024  
Table 7 Forecast Sales of Dairy Products and Alternatives by Category: Value 2024-2029  
Table 8 Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2024-2029

**DISCLAIMER**

**SOURCES**

Summary 1 Research Sources

**BABY FOOD IN INDONESIA**

**KEY DATA FINDINGS**

**2024 DEVELOPMENTS**

Stagnant performance for baby food, in light of ongoing price hikes and growing popularity of breastfeeding  
Shift towards e-commerce will slow in 2024  
Sarihusada Generasi Mahardhika continues to lead sales

**PROSPECTS AND OPPORTUNITIES**

Sluggish performance expected for standard formula milk, as breastfeeding grows in popularity  
Follow-on and growing-up milk will see competition from more economical and convenient alternatives  
Other baby food and dried baby food will see robust performances

**CATEGORY DATA**

Table 9 Sales of Baby Food by Category: Volume 2019-2024  
Table 10 Sales of Baby Food by Category: Value 2019-2024  
Table 11 Sales of Baby Food by Category: % Volume Growth 2019-2024  
Table 12 Sales of Baby Food by Category: % Value Growth 2019-2024  
Table 13 Sales of Growing-Up Milk Formula by Age: % Value 2019-2024  
Table 14 NBO Company Shares of Baby Food: % Value 2020-2024  
Table 15 LBN Brand Shares of Baby Food: % Value 2021-2024

**Scotts International. EU Vat number: PL 6772247784**

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

Table 16 Distribution of Baby Food by Format: % Value 2019-2024

Table 17 Forecast Sales of Baby Food by Category: Volume 2024-2029

Table 18 □Forecast Sales of Baby Food by Category: Value 2024-2029

Table 19 □Forecast Sales of Baby Food by Category: % Volume Growth 2024-2029

Table 20 □Forecast Sales of Baby Food by Category: % Value Growth 2024-2029

## BUTTER AND SPREADS IN INDONESIA

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Butter and spreads continues on its positive growth trajectory

Popularity of butter increases, as consumers embrace global culinary trends

Upfield Indonesia continues to lead sales, thanks to strength of Blue Band margarine

### PROSPECTS AND OPPORTUNITIES

Small and medium enterprises will support sales of butter and spreads

Demand for smaller packaging will serve to expand consumer base

Convenience stores and e-commerce will likely make a greater contribution to sales

### CATEGORY DATA

Table 21 Sales of Butter and Spreads by Category: Volume 2019-2024

Table 22 Sales of Butter and Spreads by Category: Value 2019-2024

Table 23 Sales of Butter and Spreads by Category: % Volume Growth 2019-2024

Table 24 Sales of Butter and Spreads by Category: % Value Growth 2019-2024

Table 25 NBO Company Shares of Butter and Spreads: % Value 2020-2024

Table 26 LBN Brand Shares of Butter and Spreads: % Value 2021-2024

Table 27 Distribution of Butter and Spreads by Format: % Value 2019-2024

Table 28 Forecast Sales of Butter and Spreads by Category: Volume 2024-2029

Table 29 Forecast Sales of Butter and Spreads by Category: Value 2024-2029

Table 30 □Forecast Sales of Butter and Spreads by Category: % Volume Growth 2024-2029

Table 31 □Forecast Sales of Butter and Spreads by Category: % Value Growth 2024-2029

## CHEESE IN INDONESIA

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Cheese sees rapid expansion in Indonesia

Demand for smaller cheese packaging

Kraft maintains its dominance

### PROSPECTS AND OPPORTUNITIES

Bright future for cheese, supported by educational initiatives

Cheese will become increasingly popular as a snack option

Rise of plant-based alternatives

### CATEGORY DATA

Table 32 Sales of Cheese by Category: Volume 2019-2024

Table 33 Sales of Cheese by Category: Value 2019-2024

Table 34 Sales of Cheese by Category: % Volume Growth 2019-2024

Table 35 Sales of Cheese by Category: % Value Growth 2019-2024

Table 36 Sales of Spreadable Cheese by Type: % Value 2019-2024

Table 37 Sales of Soft Cheese by Type: % Value 2019-2024

Table 38 Sales of Hard Cheese by Type: % Value 2019-2024

Table 39 NBO Company Shares of Cheese: % Value 2020-2024

Table 40 LBN Brand Shares of Cheese: % Value 2021-2024

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

Table 41 □Distribution of Cheese by Format: % Value 2019-2024

Table 42 □Forecast Sales of Cheese by Category: Volume 2024-2029

Table 43 □Forecast Sales of Cheese by Category: Value 2024-2029

Table 44 □Forecast Sales of Cheese by Category: % Volume Growth 2024-2029

Table 45 □Forecast Sales of Cheese by Category: % Value Growth 2024-2029

## DRINKING MILK PRODUCTS IN INDONESIA

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Flavoured milk drinks drive expansion

Shelf-stable milk remains prominent

Brands with longstanding history continue to lead the market

### PROSPECTS AND OPPORTUNITIES

Strong prospects for Indonesia's drinking milk products industry

Growing demand for fresh milk

Rising popularity of UHT milk amongst parents

### CATEGORY DATA

Table 46 Sales of Drinking Milk Products by Category: Volume 2019-2024

Table 47 Sales of Drinking Milk Products by Category: Value 2019-2024

Table 48 Sales of Drinking Milk Products by Category: % Volume Growth 2019-2024

Table 49 Sales of Drinking Milk Products by Category: % Value Growth 2019-2024

Table 50 NBO Company Shares of Drinking Milk Products: % Value 2020-2024

Table 51 LBN Brand Shares of Drinking Milk Products: % Value 2021-2024

Table 52 Distribution of Drinking Milk Products by Format: % Value 2019-2024

Table 53 Forecast Sales of Drinking Milk Products by Category: Volume 2024-2029

Table 54 Forecast Sales of Drinking Milk Products by Category: Value 2024-2029

Table 55 □Forecast Sales of Drinking Milk Products by Category: % Volume Growth 2024-2029

Table 56 □Forecast Sales of Drinking Milk Products by Category: % Value Growth 2024-2029

## YOGHURT AND SOUR MILK PRODUCTS IN INDONESIA

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Innovation drives yoghurt consumption in Indonesia

Yoghurt and sour milk products distribution faces ongoing challenges

Cimory continues to grow its presence

### PROSPECTS AND OPPORTUNITIES

Yoghurt market presents opportunities and challenges for manufacturers

Yoghurt is poised to capitalise on health trends

Players will seek to enhance appeal of their products through new flavour introductions, tailored to local preferences

### CATEGORY DATA

Table 57 Sales of Yoghurt and Sour Milk Products by Category: Volume 2019-2024

Table 58 Sales of Yoghurt and Sour Milk Products by Category: Value 2019-2024

Table 59 Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2019-2024

Table 60 Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2019-2024

Table 61 Sales of Flavoured Yoghurt by Flavour: Rankings 2019-2024

Table 62 NBO Company Shares of Yoghurt and Sour Milk Products: % Value 2020-2024

Table 63 LBN Brand Shares of Yoghurt and Sour Milk Products: % Value 2021-2024

Table 64 Distribution of Yoghurt and Sour Milk Products by Format: % Value 2019-2024

Table 65 Forecast Sales of Yoghurt and Sour Milk Products by Category: Volume 2024-2029

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

Table 66 □Forecast Sales of Yoghurt and Sour Milk Products by Category: Value 2024-2029

Table 67 □Forecast Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2024-2029

Table 68 □Forecast Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2024-2029

#### OTHER DAIRY IN INDONESIA

##### KEY DATA FINDINGS

##### 2024 DEVELOPMENTS

Robust growth in coconut cream and condensed milk

Leading brands such as Frisian Flag and Sun Kara maintain their dominance

Focus on innovative, health-oriented offerings

##### PROSPECTS AND OPPORTUNITIES

Continued growth for coconut cream and condensed milk

Lidded containers become increasingly popular

Growth of sachets and single-use packages

##### CATEGORY DATA

Table 69 Sales of Other Dairy by Category: Volume 2019-2024

Table 70 Sales of Other Dairy by Category: Value 2019-2024

Table 71 Sales of Other Dairy by Category: % Volume Growth 2019-2024

Table 72 Sales of Other Dairy by Category: % Value Growth 2019-2024

Table 73 Sales of Cream by Type: % Value 2019-2024

Table 74 NBO Company Shares of Other Dairy: % Value 2020-2024

Table 75 LBN Brand Shares of Other Dairy: % Value 2021-2024

Table 76 Distribution of Other Dairy by Format: % Value 2019-2024

Table 77 Forecast Sales of Other Dairy by Category: Value 2024-2029

Table 78 □Forecast Sales of Other Dairy by Category: Value 2024-2029

Table 79 □Forecast Sales of Other Dairy by Category: % Volume Growth 2024-2029

Table 80 □Forecast Sales of Other Dairy by Category: % Value Growth 2024-2029

#### PLANT-BASED DAIRY IN INDONESIA

##### KEY DATA FINDINGS

##### 2024 DEVELOPMENTS

Rising popularity of plant-based alternatives

Manufacturers drive expansion through introduction of smaller packaging and widening distribution

Innovative collaborations drive growth

##### PROSPECTS AND OPPORTUNITIES

Promising future for plant-based dairy in Indonesia, although pricing will remain significant factor

Manufacturers will seek to expand penetration through educational efforts and leveraging online and offline channels

Sugar-free products will gain traction

##### CATEGORY DATA

Table 81 Sales of Plant-Based Dairy by Category: Value 2019-2024

Table 82 Sales of Plant-Based Dairy by Category: % Value Growth 2019-2024

Table 83 Sales of Other Plant-Based Milk by Type: % Value 2021-2024

Table 84 NBO Company Shares of Plant-Based Dairy: % Value 2020-2024

Table 85 LBN Brand Shares of Plant-Based Dairy: % Value 2021-2024

Table 86 Distribution of Plant-Based Dairy by Format: % Value 2019-2024

Table 87 Forecast Sales of Plant-Based Dairy by Category: Value 2024-2029

Table 88 Forecast Sales of Plant-Based Dairy by Category: % Value Growth 2024-2029

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## Dairy Products and Alternatives in Indonesia

Market Direction | 2024-08-06 | 74 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	€2150.00
	Multiple User License (1 Site)	€4300.00
	Multiple User License (Global)	€6450.00
		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="2025-05-06"/>
		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