



Euromonitor  
International

# Bottled Water in Indonesia

November 2025

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## Bottled Water in Indonesia - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Decline, sustainability shifts, and e-commerce dynamism

#### INDUSTRY PERFORMANCE

Single-use plastic concerns and alternative formats drive off-trade volume decline

New brands and larger formats shape still purified bottled water landscape

#### WHAT'S NEXT?

Improving purchasing power and evolving bulk formats to boost bottled water sales

Packaging innovation to drive value and competitiveness in bottled water

Sustainable packaging initiatives face price barriers and limited consumer uptake

#### COMPETITIVE LANDSCAPE

Danone Aqua retains leadership of bottled water through brand strength and aggressive strategy

Functional bottled water brand emerges as most dynamic performer

Sariguna Primatirta retains dominance in still spring format with diverse sizes and distribution

#### CHANNELS

Convenience stores gains further share from leading channel small local grocers

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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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Consumers favour small local grocers for accessibility  
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