Alcoholic Drink Industry in Indonesia

Executive Summary

A small, tightly regulated market that keeps growing in value. Beer carries the volume, wine and spirits carry the mix, and tourism decides the pace.

~IDR 50T
2025E VALUE · ≈US$3.1BN

~332M L
2025E LEGAL VOLUME

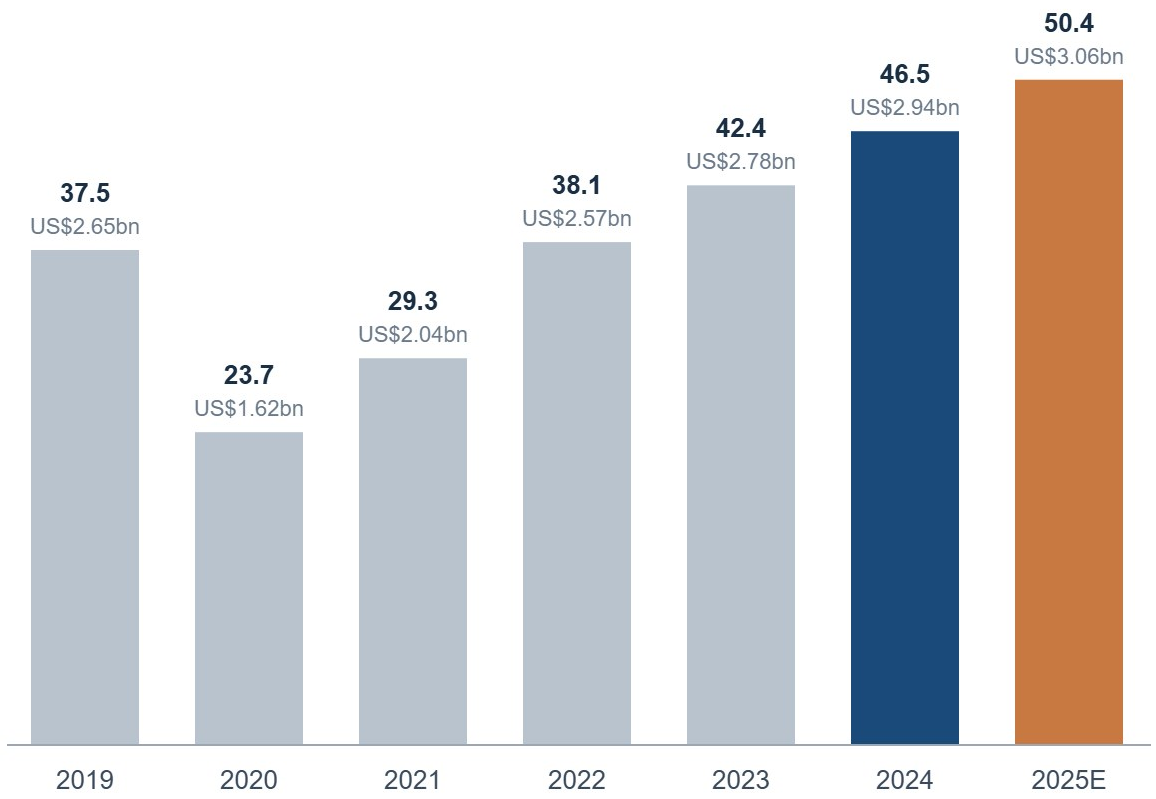
5.0%
VALUE CAGR 2019–25E

15.4M
FOREIGN ARRIVALS 2025

Estimates: extrapolation/triangulation using Euromonitor data and other sources

Value is up a third on 2019; litres only ~13%

Retail value, IDR trillion (2025 = estimate)



Category, 2025E	IDR T	Share
Beer	30.5	60.6%
Wine	11.7	23.3%
Spirits	7.7	15.4%
RTDs + cider	0.4	0.8%

- Wine and spirits gained ~5 points of value share since 2019.
- Non-alcoholic beer is ~1 in 7 beer litres and can be sold in minimarkets, unlike regular beer.
- Beer price per litre +15% since 2019; wine and spirits cheaper per litre as local labels grow.

Source: RisetLokal estimates (Euromonitor, IDX filings, BPS)

One dominant brewer, high walls, a margin-rich on-trade

~57%

MULTI BINTANG SHARE OF BEER VOLUME (EST.)

33%

MLBI NET MARGIN, 2025 (IDX FILINGS)

2.1×

ON-TRADE VS OFF-TRADE VALUE PER BEER LITRE

IDR 152k

EXCISE PER LITRE, IMPORTED SPIRITS

- **Tourism is the swing factor:** Bali hosted 6.3M foreign visitors in 2024.
- **Rules shape everything:** drinking age 21, no mass-media ads, no beer in minimarkets, import quotas.
- **E-commerce:** ~7% of off-trade value, fastest-growing.
- **Unrecorded alcohol** dwarfs legal supply; Bali arak is a model.
- **For entrants:** Bali + Jakarta on-trade, specialists, online; NA, flavoured and premium beer are open.

2026–2030 forecasts, scenarios and brand-level shares: RisetLokal Premium Report · risetlokal.com/contact

Sources: IDX, BPS, MoF (PMK 160/2023), RisetLokal estimates