

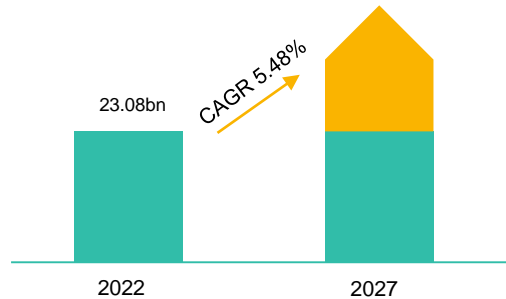


MARKET TRENDS IN INDONESIA:
DAIRY



KEY
TRENDS

Indonesia Dairy Products Market (US\$)



+ IN-SCOPE

- Fresh milk
- Yoghurt
- Cheese
- Eggs
- Non-dairy milk substitutes, preserved and powdered milk

- ▶ Volume is expected to amount to 12,472.4mkg by 2027 & is expected to show a volume growth of 3.3% in 2023.
- ▶ In relation to total population figures, per person revenues of US\$82.69 are generated in 2022, the average volume per person is expected to amount to 40.4kg in 2022.

PROSPECTS AND OPPORTUNITIES



HEALTHY CHEESE SNACK



**FAT-FREE FRESH MILK &
FLAVOURED MILK**



**STRONG GROWTH OF NICHE MILK
ALTERNATIVES**



YOGHURT POUCH

HEALTHY CHEESE SNACK



Cheese will increasingly be considered as a **good snacking option** among a growing number of households in the country, especially as cheese brands will be positioned as being suitable for snacks.

- ▶ For instance, Emina Cheese Sticks are marketed as a **delicious and healthy snack** with these processed cheese sticks made from cheddar cheese



Flavours: Barbeque, Original, and Pizza

Emina Cheese Stick

- A delicious, nutritious cheese snack perfect to enjoy with friends and family.
- Contains Calcium equivalent to 1 glass of milk, Vitamin D equivalent to 8 glasses of milk, and Protein equivalent to 0.4 glasses of milk.
- Product of Indonesia

HEALTHY CHEESE SNACK



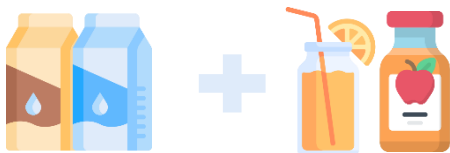
Moon Cheese 100% Natural Cheddar Cheese Snack

- All the goodness of cheese in a perfect on-the-go healthy snack - no refrigeration required!
- High in Protein
- All Natural
- Gluten Free
- Excellent source of Calcium
- Low Carb
- Keto Friendly
- Product of USA

Ingredients: Cheddar Cheese [Pasteurised Milk, Cheese Culture, Salt, Enzymes, Annatto (Vegetable Colour)].

FAT-FREE FRESH MILK & FLAVOURED MILK

Fresh milk is seeing positive growth **especially fat-free fresh milk variants**. This is related to growing health awareness with consumer efforts to consume less fat on a daily basis.



While the popularity of fresh milk has increased in recent years, **flavoured milk drinks** are generating more interest in Indonesia.

- **Dairy-only flavoured milk drinks** and **flavoured milk drinks with fruit juice** are expected to see strong value growth over the forecast period.



Diamond Skimmed Milk

- Diamond fresh milk skimmed has a fresh natural flavour and an excellent nutritional content for your health. In addition to its nutritional values,
- Diamond Fresh Milk is also delicious to drink, either straight or mixed in with coffee, milk shakes and more.
- Product of Indonesia

FAT-FREE FRESH MILK & FLAVOURED MILK



Cimory Fresh Milk Banana

- The banana milk made by Cimory has a rich and creamy taste which also gives daily nutritional needs for your family. A tasty and healthy drink that makes you crave for more.
- PT. Cisarua Mountain Dairy (Cimory) serves nutritious and fresh dairy products using the goodness of milk from local Indonesian farmers. They produce protein based drinks with the best nutritional value which are made from quality ingredients.
- Product of Indonesia

Ingredients: Fresh Cow's Milk, Sugar, Skim Milk Powder, Synthetic Banana Flavour, Natural Coloring Curcumin CI 75300.

STRONG GROWTH OF NICHE MILK ALTERNATIVES

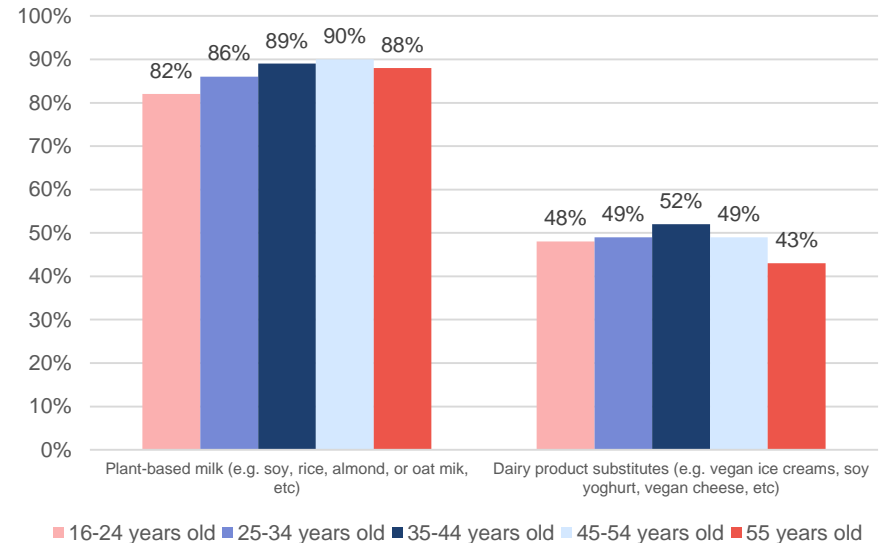


► **Milk alternatives** is expected to show strong growth in the forecast period thanks to **growing awareness** and **increasing acceptance** of these products.

This category will gain popularity in both retail and foodservice once the pandemic recedes and society fully reopens.



Types of consumed plant-based foods among Indonesians as of November 2021, by age



STRONG GROWTH OF NICHE MILK ALTERNATIVES



Soylicious Unsweetened Soybean Milk

- Alternatives for people who are allergies to cow's milk
- Good source of protein
- No preservatives
- High Calcium
- Low Fat
- Product of Indonesia

STRONG GROWTH OF NICHE MILK ALTERNATIVES



Orgain Organic Plant Based Protein Almond Milk

- Dairy free and lactose free alternative to milk. Good source of food based vitamin D and calcium.
- Perfect dairy substitute to use for baking and cooking. Add to coffee, cereal, oatmeal, or your favorite smoothie recipe!
- Product of USA

Ingredients: Organic Almond milk (Filtered Water, Organic **Almonds**), Organic **Pea Protein**, Organic Natural Flavours, Contains 1% Or Less Of The Following: Gellan Gum, **Tricalcium Phosphate**, Organic Sunflower Lecithin, Tripotassium Citrate, Sea Salt, Organic Locust Bean Gum, Natural Flavour, **Ergocalciferol (Vitamin D2)**.

YOGHURT POUCH

Both plain and flavoured yoghurt are gaining popularity supported by their health benefits and innovation by the two leading players Cisarua Dairy Indonesia PT and Greenfield Dairy Indonesia PT both of which have launched standing pouch versions of spoonable yoghurt in Indonesia.

Compared to flavoured yoghurt, plain yoghurt will continue to be characterised by relatively lower acceptance because of its strong taste. As such it will remain fairly niche over the forecast period.

- ▶ This innovation is helping to widen the consumer base as the packaging is better adapted to drinking than spoonable yoghurt.



Cimory Squeeze Yogurt Pouch

- Packaged using a thick plastic pouch with a modern funnel that makes it easy for us to enjoy it without fear of spilling and a tight seal.
- JUST SQUEEZE IT, and enjoy the yoghurt. Very practical and trendy. As for the yoghurt itself, there is no doubt about its authenticity with the typical thick and creamy texture.
- Product of Indonesia

YOGHURT POUCH



Flavours: Strawberry, Blueberry, Original

Greenfields Yoghurt Pouch

- Pouch Yoghurt is a type of fresh yoghurt, with a soft and fresh texture, suitable and liked by children.
- Greenfields Yoghurt Pouch is wholesome, natural and loaded with pure dairy goodness
- Product of Indonesia

Ingredients for Strawberry Flavour: Fresh Cow's Milk (68%), Sugar, Water, Strawberry Fruit (4.2%), Polydextrose, Aloe Vera, Skimmed Milk Powder, Liquid Milk Cream, Vegetable Thickener, Synthetic Strawberry Flavor, Cow Gelatin Stabilizer, Vegetable **Stabilizer**, Natural Colorant Carmine CI. 75470, **Citric Acid Acid Regulator**, Potassium Sorbate Preservative, Bacterial Culture (Lactobacillus delbrueckii subsp. bulgaricus, Streptococcus thermophilus, Lactobacillus paracasei, Lactobacillus rhamnosus).

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THANK YOU