

DUE DILIGENCE

From padel to Pilates, health and fitness are powering Indonesia's next consumer wave

By Nisrina Firyal Fadhlannisa

ON JAKARTA'S car-free Sundays, fried snacks used to define the morning. Now, the streets are filled with runners, cyclists and community fitness classes such as Zumba. This shift points to a broader cultural change: health and wellness are becoming embedded in urban lifestyles. It has evolved from a niche aspiration to a mainstream consumer trend reshaping diet, fashion and leisure preferences. For investors, this is evidence of a structural transformation in consumer behaviour, not a fleeting fad.

Indonesia's sports economy reached an estimated 39.5 trillion rupiah (\$3.1 billion) in 2024, indicated the Ministry of Youth and Sports, with walking, running, aerobics and other recreational activities as the main contributors. The figure marks a 5.8 per cent increase from the previous year, and accounts for 0.2 per cent of GDP.

Beyond higher incomes, the growth reflects a consumer mindset that increasingly prioritises health and active living. Digital platforms are amplifying this trend by enabling discovery, access and delivery of healthier choices, embedding wellness into daily routines. Together, these shifts suggest a durable consumption pattern with long-term growth potential.

Fitness is a major force behind this shift. Gym chains such as Fithub, FTL and Anytime Fitness have scaled rapidly, with Fithub operating more than 100 clubs across 25 cities, making structured exercise increasingly accessible beyond Jakarta.

Surabaya, Bandung and Medan are becoming regional fitness hubs in their own right, with boutique gyms and independent studios gaining traction among young professionals. In Bali, fitness has taken on a lifestyle dimension, blending yoga, surf training and wellness retreats to cater to both locals and tourists. On top of that, grassroots activities – from running and cycling groups to yoga – are being organised through apps such as Reclub and Kuyy, offering both fitness benefits and community engagement. Together, they signal a compelling move towards mass market adoption of structured physical activity.

Investment avenue

Padel offers a clear example of rapid growth and commercial potential. In Jakarta, new courts are opening almost every week. News website *Detik* reports that court operator La Padel plans to build five complexes in Greater Jakarta by

2026, adding 45 new courts. The plans include a high-end Kembangan facility with cafes, sauna and cold plunge amenities scheduled to be available in December 2025.

The sport is also emerging as an investment avenue, with some analysts citing breakeven periods of less than two years. Its rise is influencing policy too – Jakarta introduced a 10 per cent entertainment tax on commercial sports facilities in May 2025, while the provincial government (Pemprov DKI) has announced plans to build free public courts in the Blok M area.

Koni, Indonesia's sports governing body, noted that the country now ranks sixth in South-east Asia and 29th globally among padel's fastest-growing markets. What began as an urban pastime is rapidly evolving into a revenue-generating sector with both private and public backing.

Demand for fitness equipment

Exercise equipment demand is expanding in step with Indonesia's wellness ecosystem. Ken Research indicated that the market was valued at US\$1.5 billion in 2024, and is projected to grow further – supported by rising home gym adoption, urbanisation and integration with smart devices. Within this, the commercial and residential fitness equipment segment is forecast to increase from US\$46 million in 2024 to US\$78 million by 2032, reflecting a 9 per cent compound annual growth rate.

Demand is particularly strong in Jakarta, Surabaya and Bandung, where gyms, boutique studios and residential uptake are accelerating. Local production and imports from China are also helping cut costs by up to 40 per cent, making equipment more accessible to a wider audience.

Momentum from fitness is driving growth in adjacent industries. Sports and functional beverages are gaining traction, with brands such as One% Nutrition raising pre-seed funding from Init 6 and First Move, underscoring investor confidence in the sector's potential.

Local protein and supplement brands such as Provus, Evolene and Puro are also building strong followings, reflecting shifting preferences towards performance-focused nutrition. At the same time, healthy food delivery services – often enabled by digital platforms – are meeting the needs of time-pressed professionals.

Activewear is another breakout category. Love and Flair, a Jakarta-based direct-to-consumer fashion brand, has spun off its own activewear line, Bodies.co – popular among the city's Pilates and yoga communities.



People taking part in a free Zumba dance workshop on a street during Car Free Day in Jakarta on Aug 24. PHOTO: AFP

More entrepreneurs are entering the space, with new brands regularly popping up on e-commerce platforms, further expanding choice and accessibility for consumers.

Dietary changes further support the broader wellness transformation. The National Food Agency reported that per capita sugar consumption in Indonesia fell for three straight years from 2022 to 2024. Kantar Worldpanel data shows adults aged 21–30 are increasingly swapping sugary drinks for isotonic and functional alternatives. This trend is mirrored beyond Jakarta, with declining ready-to-drink tea sales in cities such as Yogyakarta and Semarang, offset by growth in functional beverage segments. The shift is re-aligning consumer spending and opening new gaps for agile entrants.

Collectively, these trends illustrate a broad re-alignment of Indonesian consumer markets. Fitness facilities demonstrate that health-based services can scale across income bands.

Cohesive ecosystem

Functional foods and beverages reflect the emergence of premiumised consumption in everyday categories. Traditional ingredients such as sugar are being de-emphasised in favour of wellness-orientated products, offering opportunities for agile challengers. The convergence of fitness, food, delivery and fashion suggests a cohesive ecosystem, not just isolated market segments.

Indonesia's health and wellness wave mirrors the consumer inflections seen in e-commerce and digital payments. Its young population and expanding digital adoption offer fertile ground for long-term investment. Rather than chasing one-off trends, the opportunity lies in capitalising on a structural shift in how millions spend on health and lifestyle. For investors, Indonesia is poised to deliver sustained growth and perhaps even healthier outcomes for years to come.

The writer is an associate at Vertex Ventures South-east Asia and India

participating in every 10 on LinkedIn.

These posts will be less "what being stuck during an MRT breakdown taught me about resilience" and more "here's the thing I did, how I did it, and the people who made it happen".

And if I'm feeling brave, I might even ask a question to invite engagement on my post.

Will it feel awkward? Almost certainly. But then again, growth never comes from staying in your comfort zone... or so LinkedIn tells me.

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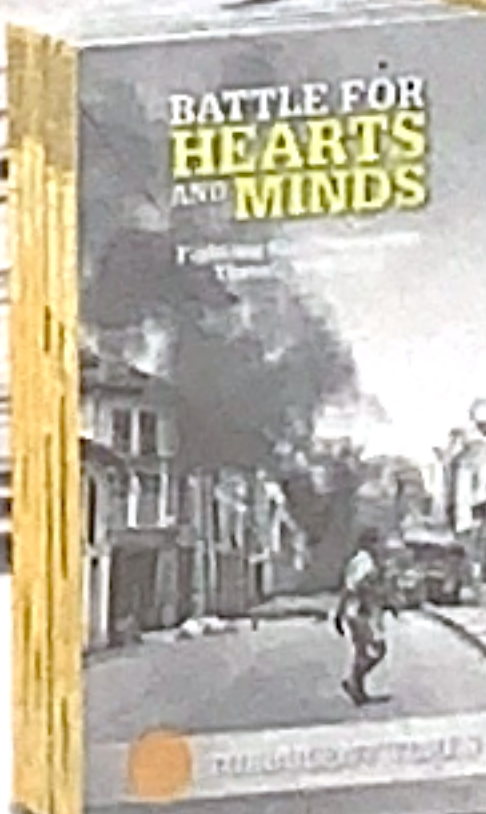
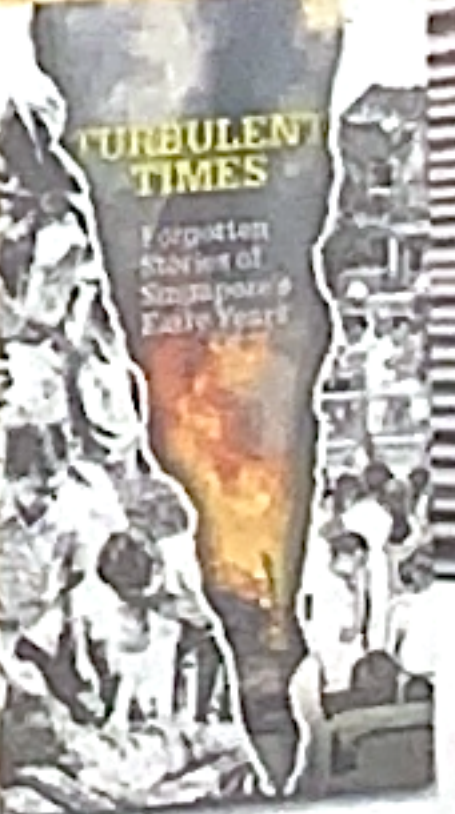
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