



Euromonitor
International

RTD Coffee in Indonesia

November 2025

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RTD Coffee in Indonesia - Category analysis

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2025 DEVELOPMENTS

Affordability, innovation, and lifestyle appeal fuel growth

INDUSTRY PERFORMANCE

Affordability and strategic distribution drive growth in RTD coffee

New brands and packaging innovations fuel growth

WHAT'S NEXT?

Lifestyle shifts and new generations to fuel future growth of RTD coffee

Flavour innovation and strategic pricing to drive greater consumer interest

Plant-based, black coffee, and street vendors: Evolving dynamics in local RTD coffee

COMPETITIVE LANDSCAPE

Affordability and youth engagement help maintain Tirta Alam Segar's lead

Santos Jaya Abadi's dynamic growth through broad appeal and innovative marketing

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Resilience and reformulation: Soft drinks navigate stagnation towards future growth

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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

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Competitive pricing, widespread distribution, and market shifts propel Nipis Madu's growth

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