

# Hot Drinks in Indonesia

December 2025

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Price hikes and innovation drive value growth in hot drinks amidst channel shifts

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Price hikes drive coffee value sales, while tea finds volume growth in health and convenience

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Value growth to be driven by price hikes and innovation amidst maturity

Hot drinks brands to blend promotions and education for enhanced loyalty

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Leaders in hot drinks navigate intensifying competition Innovation and distribution important for the top performers in hot drinks

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Despite stagnant volumes, coffee achieves strong value growth through price rises Fresh ground coffee pods is dynamic, and instant coffee mixes resilient

#### WHAT'S NEXT?

Future growth will hinge on price stability and youth-focused innovation

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Convenience and customisation to drive growth in coffee

#### COMPETITIVE LANDSCAPE

Santos Jaya Abadi leads through brand building and consumer engagement Mayora Indah achieves strongest volume growth via promotions and partnerships

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Price hikes drive value growth for tea amidst volume saturation

Affordability and youth engagement fuel success of black tea in Indonesia

#### WHAT'S NEXT?

Tea expected to see smaller packs and younger consumers in the forecast period

The evolving landscape of Indonesian tea consumption lced tea boom to fuel sales of loose black tea in Indonesia

## COMPETITIVE LANDSCAPE

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## 2025 DEVELOPMENTS

Value growth amidst saturation, driven by youth focus and innovation

# INDUSTRY PERFORMANCE

Price hikes and large young consumer group propel value growth for other hot drinks New variants and child-centric strategies drive growth for other plant-based hot drinks

## WHAT'S NEXT?

Value growth for other hot drinks amidst saturation, led by plant-based innovation Child-centric innovation to drive the future of other hot drinks in Indonesia Dual strategy of discounts and school engagement will aim to drive brand loyalty

## COMPETITIVE LANDSCAPE

Nestlé leads other hot drinks through brand strength and strategic innovation Targeted innovation powers Mayora's growth in plant-based hot drinks

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