



Tea in Indonesia

December 2025

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Tea in Indonesia - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Tea is saturated yet growing – players adapt with smaller packs and online reach

INDUSTRY PERFORMANCE

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

Iced tea boom to fuel sales of loose black tea in Indonesia

COMPETITIVE LANDSCAPE

Flavour innovation and aggressive marketing drive Unilever's leadership in tea

CHANNELS

Small local grocers is dominant in tea distribution due to accessibility and credit

Product range and promotions fuel growth for retail e-commerce in tea

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Hot Drinks in Indonesia - Industry Overview

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

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INDUSTRY PERFORMANCE

Price rises and innovation drive value growth in hot drinks

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

Growing matcha consumption impacts hot drinks, led by younger demographics

WHAT'S NEXT?

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

Hot drinks brands to blend promotions and education for enhanced loyalty

Electric motorcycle charging at convenience stores to fuel growth in hot drinks

COMPETITIVE LANDSCAPE

Leaders in hot drinks navigate intensifying competition

Innovation and distribution important for the top performers in hot drinks

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