



Euromonitor
International

Coffee in Indonesia

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Price hikes drive dynamic value growth for coffee amidst stagnant volumes

INDUSTRY PERFORMANCE

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

From mass-market promotions to premium regional products and flavoured offers

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

CHANNELS

Small local grocers dominates distribution by accessibility and micro-transactions

Price promotions and premium exclusivity drive growth for retail e-commerce

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Hot Drinks in Indonesia - Industry Overview

EXECUTIVE SUMMARY

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

KEY DATA FINDINGS

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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Value and variety drive the rise of retail e-commerce in hot drinks

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