



Euromonitor  
International

# Coffee in Indonesia

December 2025

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## Coffee in Indonesia - Category analysis

### 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

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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

## CHANNELS

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