Euromonitor International

RTD Coffee in Indonesia

November 2025

Table of Contents

RTD Coffee in Indonesia - Category analysis

KEY DATA FINDINGS

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

CHANNELS

Affordable cup packaging and accessibility drive sales via small local grocers
Expanding product range and promotions attract consumers to convenience stores

CATEGORY DATA

Table 1 - Off-trade Sales of RTD Coffee: Volume 2020-2025
Table 2 - Off-trade Sales of RTD Coffee: Value 2020-2025
Table 3 - Off-trade Sales of RTD Coffee: % Volume Growth 2020-2025
Table 4 - Off-trade Sales of RTD Coffee: % Value Growth 2020-2025
Table 5 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2021-2025
Table 6 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2022-2025
Table 7 - NBO Company Shares of Off-trade RTD Coffee: % Value 2021-2025
Table 8 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2022-2025
Table 9 - Forecast Off-trade Sales of RTD Coffee: Volume 2025-2030
Table 10 - Forecast Off-trade Sales of RTD Coffee: Value 2025-2030
Table 11 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2025-2030
Table 12 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2025-2030

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Soft Drinks in Indonesia - Industry Overview

EXECUTIVE SUMMARY

Resilience and reformulation: Soft drinks navigate stagnation towards future growth

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

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

Danone’s unwavering leadership through brand strength and strategic reach
Competitive pricing, widespread distribution, and market shifts propel Nipis Madu's growth

CHANNELS

Consumers favour small local grocers for accessibility
E-commerce is the dynamic force reshaping retail of soft drinks in Indonesia
Foodservice vs retail split

MARKET DATA

Table 13 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025
Table 14 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025
Table 15 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025
Table 16 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025
Table 17 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025
Table 18 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025
Table 19 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025
Table 20 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025
Table 21 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025
Table 22 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025
Table 23 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025
Table 24 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025
Table 25 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025
Table 26 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025
Table 27 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025
Table 28 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025
Table 29 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025
Table 30 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025
Table 31 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025
Table 32 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025
Table 33 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025
Table 34 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025
Table 35 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025
Table 36 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025
Table 37 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025
Table 38 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025
Table 39 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030
Table 40 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030
Table 41 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030
Table 42 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030
Table 43 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030
Table 44 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030
Table 45 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030
Table 46 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030
Table 47 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030
Table 48 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

APPENDIX

Fountain sales in Indonesia

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SOURCES

Summary 1 - Research Sources

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