



Hot Drinks in Indonesia

December 2025

Table of Contents

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

CHANNELS

Sachet sales and local access drive growth for small local grocers in hot drinks

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

Café culture and affordable options drive dynamic shifts in coffee in foodservice

MARKET DATA

Table 1 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2020-2025

Table 2 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2020-2025

Table 3 - Retail Sales of Hot Drinks by Category: Volume 2020-2025

Table 4 - Retail Sales of Hot Drinks by Category: Value 2020-2025

Table 5 - Retail Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 6 - Retail Sales of Hot Drinks by Category: % Value Growth 2020-2025

Table 7 - Foodservice Sales of Hot Drinks by Category: Volume 2020-2025

Table 8 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 9 - Total Sales of Hot Drinks by Category: Total Volume 2020-2025

Table 10 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2020-2025

Table 11 - NBO Company Shares of Hot Drinks: % Retail Value 2021-2025

Table 12 - LBN Brand Shares of Hot Drinks: % Retail Value 2022-2025

Table 13 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2020-2025

Table 14 - Retail Distribution of Hot Drinks by Format: % Volume 2020-2025

Table 15 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2025

Table 16 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2025-2030

Table 17 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2025-2030

Table 18 - Forecast Retail Sales of Hot Drinks by Category: Volume 2025-2030

Table 19 - Forecast Retail Sales of Hot Drinks by Category: Value 2025-2030

Table 20 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 21 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2025-2030

Table 22 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2025-2030

Table 23 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 24 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2025-2030

Table 25 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

[Coffee in Indonesia](#)

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

CATEGORY DATA

Table 26 - Retail Sales of Coffee by Category: Volume 2020-2025

Table 27 - Retail Sales of Coffee by Category: Value 2020-2025

Table 28 - Retail Sales of Coffee by Category: % Volume Growth 2020-2025

Table 29 - Retail Sales of Coffee by Category: % Value Growth 2020-2025

Table 30 - Retail Sales of Fresh Ground Coffee Pods by Hard vs Soft: % Volume 2020-2025

Table 31 - NBO Company Shares of Coffee: % Retail Value 2021-2025

Table 32 - LBN Brand Shares of Coffee: % Retail Value 2022-2025

Table 33 - Forecast Retail Sales of Coffee by Category: Volume 2025-2030

Table 34 - Forecast Retail Sales of Coffee by Category: Value 2025-2030

Table 35 - Forecast Retail Sales of Coffee by Category: % Volume Growth 2025-2030

Table 36 - Forecast Retail Sales of Coffee by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Tea in Indonesia](#)

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

CATEGORY DATA

Table 37 - Retail Sales of Tea by Category: Volume 2020-2025
Table 38 - Retail Sales of Tea by Category: Value 2020-2025
Table 39 - Retail Sales of Tea by Category: % Volume Growth 2020-2025
Table 40 - Retail Sales of Tea by Category: % Value Growth 2020-2025
Table 41 - NBO Company Shares of Tea: % Retail Value 2021-2025
Table 42 - LBN Brand Shares of Tea: % Retail Value 2022-2025
Table 43 - Forecast Retail Sales of Tea by Category: Volume 2025-2030
Table 44 - Forecast Retail Sales of Tea by Category: Value 2025-2030
Table 45 - Forecast Retail Sales of Tea by Category: % Volume Growth 2025-2030
Table 46 - Forecast Retail Sales of Tea by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Other Hot Drinks in Indonesia](#)

KEY DATA FINDINGS

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

CHANNELS

Sachet sales and proximity to consumers cement lead of small local grocers
Retail e-commerce sees dynamic growth and reshapes hot drinks in Indonesia

CATEGORY DATA

Table 47 - Retail Sales of Other Hot Drinks by Category: Volume 2020-2025
Table 48 - Retail Sales of Other Hot Drinks by Category: Value 2020-2025
Table 49 - Retail Sales of Other Hot Drinks by Category: % Volume Growth 2020-2025
Table 50 - Retail Sales of Other Hot Drinks by Category: % Value Growth 2020-2025
Table 51 - NBO Company Shares of Other Hot Drinks: % Retail Value 2021-2025
Table 52 - LBN Brand Shares of Other Hot Drinks: % Retail Value 2022-2025

Table 53 - Forecast Retail Sales of Other Hot Drinks by Category: Volume 2025-2030

Table 54 - Forecast Retail Sales of Other Hot Drinks by Category: Value 2025-2030

Table 55 - Forecast Retail Sales of Other Hot Drinks by Category: % Volume Growth 2025-2030

Table 56 - Forecast Retail Sales of Other Hot Drinks by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/hot-drinks-in-indonesia/report.