



Euromonitor
International

Coffee in Indonesia

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Table of Contents

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

CATEGORY DATA

Table 1 - Retail Sales of Coffee by Category: Volume 2020-2025

Table 2 - Retail Sales of Coffee by Category: Value 2020-2025

Table 3 - Retail Sales of Coffee by Category: % Volume Growth 2020-2025

Table 4 - Retail Sales of Coffee by Category: % Value Growth 2020-2025

Table 5 - Retail Sales of Fresh Ground Coffee Pods by Hard vs Soft: % Volume 2020-2025

Table 6 - NBO Company Shares of Coffee: % Retail Value 2021-2025

Table 7 - LBN Brand Shares of Coffee: % Retail Value 2022-2025

Table 8 - Forecast Retail Sales of Coffee by Category: Volume 2025-2030

Table 9 - Forecast Retail Sales of Coffee by Category: Value 2025-2030

Table 10 - Forecast Retail Sales of Coffee by Category: % Volume Growth 2025-2030

Table 11 - Forecast Retail Sales of Coffee by Category: % Value Growth 2025-2030

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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

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

Table 13 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2020-2025

Table 14 - Retail Sales of Hot Drinks by Category: Volume 2020-2025

Table 15 - Retail Sales of Hot Drinks by Category: Value 2020-2025

Table 16 - Retail Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 17 - Retail Sales of Hot Drinks by Category: % Value Growth 2020-2025

Table 18 - Foodservice Sales of Hot Drinks by Category: Volume 2020-2025

Table 19 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 20 - Total Sales of Hot Drinks by Category: Total Volume 2020-2025

Table 21 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2020-2025

Table 22 - NBO Company Shares of Hot Drinks: % Retail Value 2021-2025

Table 23 - LBN Brand Shares of Hot Drinks: % Retail Value 2022-2025

Table 24 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2020-2025

Table 25 - Retail Distribution of Hot Drinks by Format: % Volume 2020-2025

Table 26 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2025

Table 27 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2025-2030

Table 28 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2025-2030

Table 29 - Forecast Retail Sales of Hot Drinks by Category: Volume 2025-2030

Table 30 - Forecast Retail Sales of Hot Drinks by Category: Value 2025-2030

Table 31 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 32 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2025-2030

Table 33 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2025-2030

Table 34 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 35 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2025-2030

Table 36 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2025-2030

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SOURCES

Summary 1 - Research Sources

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