

MARKET TREND ANALYSIS REPORT

Coffee Industry – Jakarta & Bandung Market

Justdhani AI Research & Intelligence

Turning Data into Strategic Insight

Client Type: SME – Coffee Shop Chain (3 outlets, planning expansion)

Duration: 7–10 Days

Service Package: Deep Intelligence – Market Trend Analysis

Report Date: October 2025

Confidential Mock Deliverable – Service Demonstration

Executive Summary

This mock report demonstrates the typical deliverable format provided to clients who engage **Justdhani AI Research & Intelligence** services for market trend analysis.

The Challenge

A local coffee shop chain with 3 outlets in South Jakarta was planning to expand to Bandung and open 2 additional locations in Jakarta. However, they faced critical uncertainties:

- 1. Post-Pandemic Market Shifts** – Consumer coffee consumption patterns had changed dramatically; unclear whether premium specialty coffee still had strong demand
- 2. Rising Competition** – New coffee brands (both local and international) were entering the market aggressively
- 3. Expansion Risk** – Limited data on Bandung market potential and whether their Jakarta positioning would translate successfully

The client needed comprehensive market intelligence to validate their expansion strategy, identify emerging trends, and optimize their positioning before committing significant capital investment.

Our Approach

Justdhani AI Research & Intelligence conducted a comprehensive **7-day Market Trend Analysis** using AI-augmented research methodology combined with human market context validation.

Research Framework:

Research Area	Focus	Tools & Methods
Market Sizing	Total addressable market, growth rate, key segments	Industry reports, government data, AI-powered aggregation
Trend Identification	5 major trends shaping the coffee industry	Social listening (Twitter, Instagram, Reddit), news analysis, Google Trends
Consumer Behavior	Preferences, pain points, purchasing patterns	Survey data analysis, review mining (Google Reviews, Zomato), sentiment analysis
Competitive Landscape	Key players, market share, positioning strategies	Brand tracking, social media analytics, pricing data

Research Area	Focus	Tools & Methods
Opportunity Mapping	Untapped segments, emerging formats, geographic gaps	Cross-referencing trend data with competitive gaps

Key Differentiator:

We combine **AI-powered data aggregation** (processing thousands of data points in hours) with **human cultural context** to ensure insights are accurate, locally relevant, and immediately actionable for Indonesian SMEs.

Market Overview: Indonesian Coffee Industry

Market Size & Growth

- **Total Market Value (2025):** Estimated Rp 12.3 trillion (coffee shops, cafés, specialty retailers)
- **Growth Rate (2020-2025):** 8.2% CAGR (compound annual growth rate)
- **Jakarta Market Share:** 42% of national coffee shop revenue
- **Bandung Market Share:** 11% of national coffee shop revenue (growing at 12% annually)

Market Segmentation

Segment	Description	Market Share	Growth Trend
Specialty Coffee	Third-wave, single-origin, manual brew methods	28%	High growth (+15% annually)
Premium Chain	Starbucks-style, branded experience	35%	Moderate growth (+6% annually)
Mid-Market	Local chains, affordable premium (Kopi Kenangan, Fore)	22%	High growth (+18% annually)
Budget/Traditional	Warung kopi, street vendors	15%	Declining (-3% annually)

Key Insight:

Mid-market "affordable premium" segment is the fastest-growing, driven by younger consumers (Gen Z, Millennials) seeking quality coffee at accessible prices.

Key Trend Analysis

Trend 1: The Rise of "Third Space 2.0"

Description:

Post-pandemic consumers are redefining coffee shops as flexible workspaces, not just social hangout spots. Demand for reliable WiFi, power outlets, comfortable seating, and quiet zones has surged.

Data Evidence:

- 68% of coffee shop customers now spend 2+ hours per visit (up from 45% pre-pandemic)
- 54% of customers prioritize "good work environment" over coffee quality alone
- Coffee shops with designated "work zones" report 23% higher weekday foot traffic

Consumer Quote (Social Listening):

> "I'll pay extra if the café has fast WiFi and won't kick me out after 1 hour. Coffee quality matters, but space quality matters more."

Implication for Client:

Design new outlets with designated work-friendly zones (power outlets at every seat, varied seating types, soundproofing). Consider membership/co-working hybrid models.

Trend 2: Health-Conscious Coffee Consumption

Description:

Consumers are increasingly seeking healthier coffee options: plant-based milk alternatives, low-sugar options, functional add-ins (collagen, adaptogens), and transparency about sourcing.

Data Evidence:

- 72% of Jakarta coffee consumers have tried plant-based milk (oat, almond, soy)
- 41% actively seek "low-sugar" or "no-sugar" menu options
- "Organic" and "fair trade" keywords increased 140% in coffee-related searches (Google Trends, 2024-2025)

Menu Trend:

- Oat milk now accounts for 18% of all milk alternatives ordered (overtaking almond milk)
- Cold brew and nitro coffee growing at 25% annually (perceived as "healthier" than hot espresso drinks)

Implication for Client:

Expand plant-based milk offerings as standard (not premium add-on). Introduce "wellness coffee" line (collagen lattes, mushroom coffee, low-calorie options). Highlight ethical sourcing in branding.

Trend 3: Grab-and-Go Convenience

Description:

Fast-paced urban lifestyles are driving demand for quick-service formats: mobile app pre-ordering, drive-thru, kiosk models, and 5-minute in-and-out service.

Data Evidence:

- 63% of morning coffee purchases are takeaway (not dine-in)
- Mobile app pre-ordering grew 89% year-over-year (2024-2025)
- Drive-thru coffee outlets in Jakarta reported 35% higher revenue per location vs. traditional stores

Competitive Benchmark:

- Kopi Kenangan's success attributed largely to grab-and-go format and app-based loyalty
- Fore Coffee's rapid expansion driven by small-footprint, high-turnover kiosk model

Implication for Client:

Consider hybrid format: one side for "third space" work-friendly seating, one side for grab-and-go express service. Develop mobile app with pre-order and loyalty rewards.

Trend 4: Hyper-Local & Community-Centric Branding

Description:

Consumers, especially in Bandung, prefer coffee brands with strong local identity, community engagement, and authentic storytelling over generic international chains.

Data Evidence:

- 58% of Bandung coffee consumers prefer "local Bandung brands" over national/international chains
- Coffee shops hosting community events (live music, workshops, art exhibitions) report 31% higher customer loyalty
- Social media engagement 3x higher for posts featuring local culture, ingredients, or partnerships

Bandung-Specific Insight:

Bandung consumers value "Sundanese pride" and local authenticity. Coffee shops integrating local art, music, and cultural elements outperform generic concepts.

Implication for Client:

Tailor Bandung outlets with hyper-local branding (collaborate with local artists, source Sundanese snacks, host community events). Avoid copy-paste Jakarta outlet design.

Trend 5: Subscription & Loyalty Models

Description:

Coffee subscription services (monthly unlimited drinks, discounted pre-paid packages) are becoming mainstream, driven by consumer desire for value and convenience.

Data Evidence:

- 37% of frequent coffee drinkers (3+ visits/week) are interested in subscription models
- Flash Coffee's subscription service grew 120% in 2024
- Average subscription customer lifetime value 4.2x higher than non-subscribers

Model Examples:

- Unlimited coffee subscription: Rp 299,000/month (avg. 20 drinks = Rp 15,000/drink)
- Prepaid packages: Buy 10 drinks, get 2 free (12% discount)

Implication for Client:

Launch tiered subscription model at new outlets. Use subscriptions to guarantee baseline revenue and improve cash flow predictability. Market heavily to office workers and students.

Consumer Behavior Insights

Target Audience Segmentation

Segment 1: Young Professionals (25-35 years old)

- **Profile:** Office workers, freelancers, remote employees
- **Needs:** Work-friendly space, fast WiFi, power outlets, quiet zones
- **Price Sensitivity:** Moderate (willing to pay Rp 35,000-50,000 per drink for quality + space)
- **Visit Frequency:** 3-5 times/week
- **Peak Hours:** Weekday mornings (7-10 AM) and afternoons (2-5 PM)

Segment 2: Students (18-24 years old)

- **Profile:** University students, vocational students
- **Needs:** Affordable prices, group seating, Instagram-worthy aesthetics
- **Price Sensitivity:** High (prefer Rp 20,000-35,000 range)
- **Visit Frequency:** 2-3 times/week
- **Peak Hours:** Afternoons and evenings (1-8 PM)

Segment 3: Coffee Enthusiasts (30-45 years old)

- **Profile:** Specialty coffee fans, connoisseurs
- **Needs:** High-quality beans, manual brew methods, knowledgeable baristas
- **Price Sensitivity:** Low (willing to pay Rp 50,000-80,000 for specialty drinks)
- **Visit Frequency:** 1-2 times/week (weekend mornings)
- **Peak Hours:** Weekend mornings (9 AM-12 PM)

Key Pain Points

Pain Point	% of Respondents	Impact on Purchase Decision
Inconsistent WiFi quality	64%	High
Limited power outlets	58%	High
Long wait times during peak hours	52%	Medium
Lack of healthy/low-sugar options	47%	Medium
No mobile app/online ordering	43%	Medium
Limited seating during busy hours	39%	High

Competitive Landscape

Key Players – Jakarta Market

Brand	Positioning	Price Range	Strength	Weakness
Starbucks	Premium international	Rp 45,000-75,000	Brand recognition, consistency	Expensive, generic
Kopi Kenangan	Affordable premium	Rp 15,000-35,000	Speed, app loyalty, accessibility	Limited seating
Fore Coffee	Mid-premium grab-and-go	Rp 25,000-45,000	Convenient locations, tech-forward	Small footprint, no workspace
Local Specialty (e.g., Tanamera, Anomali)	High-quality third-wave	Rp 40,000-70,000	Coffee quality, authenticity	Higher prices, fewer locations

Key Players – Bandung Market

Brand	Positioning	Price Range	Strength	Weakness
Kedai Kopi Kulo	Local affordable premium	Rp 12,000-28,000	Bandung local identity, low prices	Limited menu innovation
Janji Jiwa	National chain, accessible	Rp 12,000-30,000	Strong brand, wide distribution	Generic, less differentiation
Kopi Tuku	Premium grab-and-go	Rp 25,000-45,000	Unique signature drinks	Limited locations
Independent Cafés	Specialty, community-focused	Rp 30,000-60,000	Authentic, loyal community	Inconsistent quality

Competitive Gap Identified:

No major player in Bandung offers a **hybrid model** (work-friendly space + grab-and-go convenience + affordable premium pricing + local cultural identity). This is a clear opportunity.

Emerging Opportunities

Opportunity 1: Hybrid Work-Café Format

Market Gap:

Consumers want both quality coffee AND functional workspace, but most brands optimize for one or the other.

Strategic Recommendation:

Design new outlets with dual zones:

- **Zone A:** Work-friendly (70% capacity) – quiet, power outlets, comfortable seating, strong WiFi
- **Zone B:** Grab-and-go express (30% capacity) – fast service, mobile app pick-up, takeaway-focused

Revenue Model:

- Zone A: Higher spend per visit (Rp 50,000-80,000 including snacks/second drinks)
- Zone B: High turnover, volume-based (Rp 25,000-40,000 per transaction)

Expected Impact:

- 30% increase in average daily customers
- 40% increase in customer dwell time (Zone A)
- 25% increase in repeat visit frequency

Opportunity 2: Subscription-First Business Model

Market Gap:

Coffee subscriptions exist but are underutilized as a core revenue driver and customer retention tool.

Strategic Recommendation:

Launch tiered subscription plans:

- **Basic:** Rp 199,000/month (15 standard drinks)
- **Premium:** Rp 299,000/month (unlimited standard drinks + 5 specialty drinks)
- **Corporate:** Rp 2,500,000/month (50 employees, unlimited drinks)

Expected Impact:

- Guaranteed baseline revenue (predictable cash flow)
- 4x higher customer lifetime value
- 60% reduction in customer acquisition cost (vs. one-time buyers)

Opportunity 3: Bandung Hyper-Local Positioning**Market Gap:**

National chains entering Bandung use generic branding; local consumers crave authentic Sundanese identity.

Strategic Recommendation:

Position Bandung outlets as "**Bandung's Living Room**" concept:

- Collaborate with local Sundanese artists for interior design
- Source local snacks (pisang molen, batagor, surabi) from Bandung vendors
- Host weekly community events (live angklung music, poetry nights, art exhibitions)
- Use bilingual menu (Sundanese + Indonesian)

Expected Impact:

- Stronger brand loyalty vs. national competitors
- 40% higher social media engagement (local pride content)
- Premium pricing power (+15% vs. national chains)

Strategic Recommendations**Recommendation Framework**

Focus Area	Current State	Recommended Action	Expected Impact
Outlet Format	Traditional café (dine-in only)	Introduce hybrid work-café + grab-and-go dual zones	+30% daily customers
Menu Innovation	Standard coffee menu	Add wellness coffee line (plant-based, low-sugar, functional)	+12% average transaction value
Technology	No app, manual ordering	Develop mobile app with pre-order, loyalty, subscription	+25% repeat customers
Bandung Positioning	Generic national brand	Hyper-local branding (Sundanese culture integration)	+40% brand loyalty
Revenue Model	Transaction-based only	Launch tiered subscription plans	4x customer lifetime value

Implementation Roadmap

Phase 1: Pre-Launch Preparation (Week 1-4)

Actions:

- Finalize dual-zone outlet design (architect consultation)
- Develop mobile app MVP (basic features: menu, pre-order, loyalty)
- Source local Bandung partners (artists, snack vendors, musicians)
- Create subscription pricing model and marketing materials

Key Milestones:

- Week 2: Outlet design finalized
- Week 3: Mobile app beta testing
- Week 4: Bandung partnership agreements signed

Phase 2: Soft Launch (Week 5-8)

Actions:

- Open first Bandung outlet with hyper-local positioning
- Launch mobile app and subscription plans (early adopter discounts)
- Host grand opening community event (live music, free samples)
- Collect customer feedback and iterate quickly

Key Milestones:

- Week 5: Bandung outlet soft opening
- Week 6: First 50 subscribers acquired
- Week 8: App downloads reach 500+

Phase 3: Scale & Optimize (Week 9-12)

Actions:

- Analyze performance data (Zone A vs. Zone B revenue, subscription retention)
- Optimize menu based on sales data
- Plan second Bandung outlet location (based on demographic analysis)
- Expand subscription marketing to corporate clients

Key Milestones:

- Week 10: 100+ active subscribers
- Week 12: Decision on second Bandung location finalized

Impact Projection

If strategic recommendations are implemented, the client can expect:

Metric	Current Baseline	Projected (6 months)	Improvement
Daily Customers (per outlet)	120	160	+33%

Metric	Current Baseline	Projected (6 months)	Improvement
Average Transaction Value	Rp 38,000	Rp 45,000	+18%
Subscription Customers	0	150+	New revenue stream
Monthly Revenue (per outlet)	Rp 136,800,000	Rp 216,000,000	+58%
Customer Retention Rate	35%	62%	+77%

Deliverables

This engagement included:

1. **Market Trend Report (PDF, 12 pages)** – Comprehensive trend analysis with data visualizations
2. **Consumer Insights Summary (PDF, 4 pages)** – Target audience profiles, pain points, preferences
3. **Competitive Landscape Matrix (Excel)** – Key players, positioning, pricing, strengths/weaknesses
4. **Opportunity Roadmap (PDF, 3 pages)** – 3 strategic opportunities with implementation guidelines
5. **30-Minute Consultation Session** – Q&A and implementation guidance

Client Testimonial (Simulated)

> "We were about to expand using the exact same format as our Jakarta outlets. This trend analysis completely changed our strategy—especially the Bandung hyper-local positioning. The subscription model recommendation alone could transform our cash flow. Worth every rupiah."

— Founder & Owner, Local Coffee Chain

Why Choose Justdhani AI Research & Intelligence?

Our Philosophy:

AI doesn't replace human intuition—it sharpens it.

We combine AI-powered data aggregation (processing thousands of sources in hours) with human cultural intelligence and business context to deliver insights that are:

- **Accurate** (90-95% validation rate)
- **Locally Relevant** (Indonesia-specific cultural context)
- **Immediately Actionable** (clear implementation steps, not just data dumps)

Core Capabilities:

- AI Research & Competitive Intelligence
- Market Trend & Industry Mapping
- Digital Profiling & Reputation Analysis
- Supplier/Partner Research
- Prompt Strategy & AI Adoption Consulting

Pricing

Service Tier	Duration	Deliverables	Investment
Quick Insight	1-2 days	Brief summary (2-3 pages)	Rp 1,200,000
Standard Research	3-5 days	Full report + dataset	Rp 3,500,000
Deep Intelligence	7-10 days	Comprehensive report + consultation	Rp 6,500,000
Ongoing Support	Monthly retainer	Weekly insights + priority access	Rp 4,500,000/month

Note: Market Trend Analysis typically falls under **Deep Intelligence** tier.

About Justdhani AI Research & Intelligence

Tagline: *Turning Data into Strategic Insight*

Who We Serve:

- SMEs & Startups (planning expansion, product launches, market entry)
- Business Owners (seeking competitive edge through market intelligence)
- Corporate Strategy Teams (needing fast, reliable market data)

What Makes Us Different:

- ✓ **AI-Augmented Speed** – Deliver in days what traditional research firms take weeks to complete
- ✓ **Indonesia-Focused** – Deep understanding of local market dynamics, cultural nuances, consumer behavior
- ✓ **SME-Friendly Pricing** – Accessible pricing without compromising quality
- ✓ **Actionable Output** – Every insight includes clear implementation recommendations

Contact Information

Justdhani AI Research & Intelligence

- **Location:** Jakarta, Indonesia
- **Website:** www.justdhani.com
- **Email:** copydhani@gmail.com
- **LinkedIn:** www.linkedin.com/in/syahrir-r-dhani

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For inquiries about AI Research & Intelligence services, contact copydhani@gmail.com