



Consumer Foodservice in Indonesia

March 2026

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Consumer Foodservice in Indonesia

EXECUTIVE SUMMARY

Discounting eases the squeeze though 2026 will remain fragile

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Inflation and cost pressure reshape pricing strategy
Drive-through accelerates, with eat-in leading fulfillment
Loyalty becomes more digital amid uneven adoption

WHAT'S NEXT?

Further growth projected but 2026 will stay discount-led
Trends shift towards modernised nostalgia, health cues and operational new formats
Sustainability moves from packaging to ingredient provenance

COMPETITIVE LANDSCAPE

Global brands stabilise, while local chains scale aggressively
Ai-CHA rises through menu novelty, pricing and social reach
Chagee entry signals intensifying competition in branded tea

CHANNELS

Chains outgrow independents as networks expand and spending consolidates
Independents hold ground in street stalls/kiosks through low barriers and dense presence

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Cafés/Bars in Indonesia

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Coffee chains scale fast, while formats split between grab-and-go and larger cafés

INDUSTRY PERFORMANCE

Value sales rise in 2025 with chains add outlets and keeping prices accessible

Specialist chains drive growth through concept diversification and broader menus
Takeaway leads fulfilment as grab-and-go formats dominate promotional strategy

WHAT'S NEXT?

Purchasing power improves, lifting frequency and widening occasions
Takeaway stays dominant, while larger-format sites gain relevance in retail
Gen Z-led concepts shape design, while global brands keep playing to dine-in strengths

COMPETITIVE LANDSCAPE

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[Full-Service Restaurants in Indonesia](#)

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2025 DEVELOPMENTS

Higher ticket sizes drive modest uptick, while local concepts keep diners engaged-

INDUSTRY PERFORMANCE

Price increases lift value, even as discounting stays limited
Chained pizza concepts lead growth through innovation and experience-driven engagement
Eat-in dominates, while delivery plays a secondary role

WHAT'S NEXT?

Purchasing power recovery as key lever for stronger value growth
Eat-in remains central, while delivery grows from a smaller base
Local regional cuisines stay pivotal, while international concepts defend share through innovation

COMPETITIVE LANDSCAPE

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2025 DEVELOPMENTS

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INDUSTRY PERFORMANCE

Value sales rise as global brands stabilise and price-led offers intensify

Local chains strengthen growth through affordability and rapid rollout

Middle Eastern limited-service restaurants gain pace through localisation and sharper pricing

Eat-in leads fulfilment, while delivery remains promotion-driven

WHAT'S NEXT?

Purchasing power recovery resets the growth ceiling, but price-led competition remains central

Delivery stays relevant, while first-party apps build a larger share of transactions

Flavour extensions and localised menus keep innovation high without raising core prices

COMPETITIVE LANDSCAPE

Rekso Nasional Food leads through brand strength, promo clarity and operational innovation

Pesta Pora Abadi gains momentum through social-led marketing and price parity in delivery

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Footfall weakens as hypermarkets pull back, keeping cafeterias under pressure

INDUSTRY PERFORMANCE

Value sales fall thanks to hypermarket decline

Limited innovation keeps the channel functional rather than destination-led

WHAT'S NEXT?

Hypermarket contraction is main drag on value growth

Eat-in remains dominant though the channel offers limited reasons to spend more

Viral menu items offer limited upside, but execution likely to remain patchy

COMPETITIVE LANDSCAPE

Trans Retail Indonesia leads through scale, but growth remains constrained by hypermarket performance

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Street Stalls/Kiosks in Indonesia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Momentum slows as price rises outpace outlet growth

INDUSTRY PERFORMANCE

Value sales see further though slowed growth in 2025

Format rotation reshapes the competitive set as some concepts lose relevance

Pricing pressure intensifies, while fulfillment remains takeaway-led

WHAT'S NEXT?

Value growth set to strengthen as low-income recovery reshapes meal budgeting

Takeaway to stay ahead, while delivery will remain platform-led and distance-sensitive
Product innovation shifts towards flavour mashups and snackable hot items

COMPETITIVE LANDSCAPE

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[Consumer Foodservice By Location in Indonesia](#)

2025 DEVELOPMENTS

Travel-led occasions drive 2025 gains, while standalone keeps expanding

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Travel locations post strongest non-standalone value growth with toll-road rest areas capturing higher spend
Standalone locations gain share as local players prioritise lower-cost expansion routes
Dine-in promotions shape behaviour, but fulfilment varies by location

WHAT'S NEXT?

Travel to benefit from infrastructure investment
Standalone rollout remains a core growth route as operators manage risk
Retail remains mixed: new developments add opportunity, but traffic quality stays uneven

COMPETITIVE LANDSCAPE

Rekso leads in non-standalone sites through scale, trust and technology-led convenience
Pesta Pora Abadi leads standalone sites on expansion pace and value positioning

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