Consumer Foodservice in Indonesia

March 2026

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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

Fore Coffee leads as post-IPO expansion reshapes scale dynamics
Tomoro Coffee ranks among the fastest scalers, with funding-backed growth and payment innovation
Chained operators rise fastest as format breadth and promotions outpace independents

CATEGORY DATA

DISCLAIMER

Full-Service Restaurants in Indonesia

KEY DATA FINDINGS

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

Sari Melati Kencana leads as Pizza Hut returns to growth through menu and format renewal
Leading player drives company dynamism in 2025
Independent Asian operators hold the largest share through scale, local fit and value positioning

CATEGORY DATA

DISCLAIMER

Self-Service Cafeterias in Indonesia

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

Limited innovation and consumer preferences in self-service cafeterias

Independents retain large share through office-based locations and weekday demand

CATEGORY DATA

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DISCLAIMER

Street Stalls/Kiosks in Indonesia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Momentum slows as price rises outpace outlet growth

INDUSTRY PERFORMANCE

Values sales see further though slowed growth in 2025

Format rotation reshapes the competitive set as some concepts lose relevance

Pricing pressure intensifies, while fulfilment 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

Scale and sharp deals keep Zhisheng in front
Ai-CHA stands out through novelty and social-first execution
Independents retain the edge on density and variety

CATEGORY DATA

DISCLAIMER

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

CATEGORY DATA

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