



**Euromonitor  
International**

# Consumer Foodservice By Location in Indonesia

March 2026

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### 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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## Consumer Foodservice in Indonesia - Industry Overview

### 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 fulfilment

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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