



Euromonitor  
International

# Self-Service Cafeterias in Indonesia

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## Self-Service Cafeterias in Indonesia - Category analysis

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#### 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

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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

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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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For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/self-service-cafeterias-in-indonesia/report](http://www.euromonitor.com/self-service-cafeterias-in-indonesia/report).