



Euromonitor  
International

# Full-Service Restaurants in Indonesia

March 2026

Table of Contents

## Full-Service Restaurants in Indonesia - Category analysis

### 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

Table 1 - Full-Service Restaurants by Category: Units/Outlets 2020-2025

Table 2 - Sales in Full-Service Restaurants by Category: Number of Transactions 2020-2025

Table 3 - Sales in Full-Service Restaurants by Category: Foodservice Value 2020-2025

Table 4 - Full-Service Restaurants by Category: % Units/Outlets Growth 2020-2025

Table 5 - Sales in Full-Service Restaurants by Category: % Transaction Growth 2020-2025

Table 6 - Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2020-2025

Table 7 - GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2021-2025

Table 8 - GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2022-2025

Table 9 - Forecast Full-Service Restaurants by Category: Units/Outlets 2025-2030

Table 10 - Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2025-2030

Table 11 - Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2025-2030

Table 12 - Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2025-2030

Table 13 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2025-2030

Table 14 - Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

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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

## MARKET DATA

Table 15 - Units, Transactions and Value Sales in Consumer Foodservice 2020-2025

Table 16 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2020-2025

Table 17 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2025

Table 18 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2020-2025

Table 19 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2020-2025

Table 20 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2025

Table 21 - Sales in Consumer Foodservice by Location: % Foodservice Value 2020-2025

Table 22 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2020-2025

Table 23 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2025

Table 24 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2022-2025

Table 25 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2025

Table 26 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2025-2030

Table 27 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2025-2030

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## SOURCES

Summary 1 - Research Sources

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