



Street Stalls/Kiosks in Indonesia

March 2026

[Table of Contents](#)

Street Stalls/Kiosks in Indonesia - Category analysis

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

Table 1 - Street Stalls/Kiosks: Units/Outlets 2020-2025

Table 2 - Sales in Street Stalls/Kiosks: Number of Transactions 2020-2025

Table 3 - Sales in Street Stalls/Kiosks: Foodservice Value 2020-2025

Table 4 - Street Stalls/Kiosks: % Units/Outlets Growth 2020-2025

Table 5 - Sales in Street Stalls/Kiosks: % Transaction Growth 2020-2025

Table 6 - Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2020-2025

Table 7 - GBO Company Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2021-2025

Table 8 - GBN Brand Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2022-2025

Table 9 - Forecast Street Stalls/Kiosks: Units/Outlets 2025-2030

Table 10 - Forecast Sales in Street Stalls/Kiosks: Number of Transactions 2025-2030

Table 11 - Forecast Sales in Street Stalls/Kiosks: Foodservice Value 2025-2030

Table 12 - Forecast Street Stalls/Kiosks: % Units/Outlets Growth 2025-2030

Table 13 - Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2025-2030

Table 14 - Forecast Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2025-2030

DISCLAIMER

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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