



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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