



Euromonitor
International

Cafés/Bars in Indonesia

March 2026

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2025 DEVELOPMENTS

Coffee chains scale fast, while formats split between grab-and-go and larger cafés

INDUSTRY PERFORMANCE

Value sales rise in 2025 with chains add outlets and keeping prices accessible

Specialist chains drive growth through concept diversification and broader menus

Takeaway leads fulfilment as grab-and-go formats dominate promotional strategy

WHAT'S NEXT?

Purchasing power improves, lifting frequency and widening occasions

Takeaway stays dominant, while larger-format sites gain relevance in retail

Gen Z-led concepts shape design, while global brands keep playing to dine-in strengths

COMPETITIVE LANDSCAPE

Fore Coffee leads as post-IPO expansion reshapes scale dynamics

Tomoro Coffee ranks among the fastest scalers, with funding-backed growth and payment innovation

Chained operators rise fastest as format breadth and promotions outpace independents

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Consumer Foodservice in Indonesia - Industry Overview

EXECUTIVE SUMMARY

Discounting eases the squeeze though 2026 will remain fragile

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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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