



Euromonitor
International

Limited-Service Restaurants in Indonesia

March 2026

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2025 DEVELOPMENTS

Discount-led value positioning sustains growth, while local chains keep scaling

INDUSTRY PERFORMANCE

Value sales rise as global brands stabilise and price-led offers intensify

Local chains strengthen growth through affordability and rapid rollout

Middle Eastern limited-service restaurants gain pace through localisation and sharper pricing

Eat-in leads fulfilment, while delivery remains promotion-driven

WHAT'S NEXT?

Purchasing power recovery resets the growth ceiling, but price-led competition remains central

Delivery stays relevant, while first-party apps build a larger share of transactions

Flavour extensions and localised menus keep innovation high without raising core prices

COMPETITIVE LANDSCAPE

Rekso Nasional Food leads through brand strength, promo clarity and operational innovation

Pesta Pora Abadi gains momentum through social-led marketing and price parity in delivery

Chained operators retain the largest share as formats and locations favour scale

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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

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