



Euromonitor
International

Full-Service Restaurants in Indonesia

March 2026

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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

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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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Independents hold ground in street stalls/kiosks through low barriers and dense presence

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