



Euromonitor
International

Consumer Foodservice in Indonesia

March 2026

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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

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

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

WHAT'S NEXT?

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WHAT'S NEXT?

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INDUSTRY PERFORMANCE

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Pricing pressure intensifies, while fulfilment remains takeaway-led

WHAT'S NEXT?

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[Consumer Foodservice By Location in Indonesia](#)

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KEY DATA FINDINGS

INDUSTRY PERFORMANCE

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Dine-in promotions shape behaviour, but fulfilment varies by location

WHAT'S NEXT?

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Retail remains mixed: new developments add opportunity, but traffic quality stays uneven

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