



Euromonitor
International

Street Stalls/Kiosks in Indonesia

March 2026

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Street Stalls/Kiosks in Indonesia - Category analysis

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2025 DEVELOPMENTS

Momentum slows as price rises outpace outlet growth

INDUSTRY PERFORMANCE

Values sales see further though slowed growth in 2025

Format rotation reshapes the competitive set as some concepts lose relevance

Pricing pressure intensifies, while fulfilment remains takeaway-led

WHAT'S NEXT?

Value growth set to strengthen as low-income recovery reshapes meal budgeting

Takeaway to stay ahead, while delivery will remain platform-led and distance-sensitive

Product innovation shifts towards flavour mashups and snackable hot items

COMPETITIVE LANDSCAPE

Scale and sharp deals keep Zhisheng in front

Ai-CHA stands out through novelty and social-first execution

Independents retain the edge on density and variety

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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

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

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