



Euromonitor
International

Self-Service Cafeterias in Indonesia

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Self-Service Cafeterias in Indonesia - Category analysis

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2025 DEVELOPMENTS

Footfall weakens as hypermarkets pull back, keeping cafeterias under pressure

INDUSTRY PERFORMANCE

Value sales fall thanks to hypermarket decline

Limited innovation keeps the channel functional rather than destination-led

WHAT'S NEXT?

Hypermarket contraction is main drag on value growth

Eat-in remains dominant though the channel offers limited reasons to spend more

Viral menu items offer limited upside, but execution likely to remain patchy

COMPETITIVE LANDSCAPE

Trans Retail Indonesia leads through scale, but growth remains constrained by hypermarket performance

Limited innovation and consumer preferences in self-service cafeterias

Independents retain large share through office-based locations and weekday demand

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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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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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