

# Consumer Foodservice in Indonesia

February 2024

Table of Contents

## EXECUTIVE SUMMARY

Consumer foodservice in 2023: The big picture

2023 key trends

Competitive landscape

Independent foodservice developments

What next for consumer foodservice?

## MARKET DATA

Table 1 - Units, Transactions and Value Sales in Consumer Foodservice 2018-2023

Table 2 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2018-2023

Table 3 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2023

Table 4 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2018-2023

Table 5 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2018-2023

Table 6 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2023

Table 7 - Sales in Consumer Foodservice by Location: % Foodservice Value 2018-2023

Table 8 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2018-2023

Table 9 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2019-2023

Table 10 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2020-2023

Table 11 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2023

Table 12 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2023-2028

Table 13 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2023-2028

## DISCLAIMER

## SOURCES

Summary 1 - Research Sources

## Cafés/Bars in Indonesia

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Another year of positive growth, consistent with rising coffee-drinking culture, although value sales remained below pre-pandemic levels

Chained players drive outlet expansion

WhatsApp messaging services offer unique discounts, while limited-edition items also serve to attract consumer interest

### PROSPECTS AND OPPORTUNITIES

Buoyant performance expected, with specialist coffee venues leading the way

Innovative beverage variants will drive growth

Higher sales contribution from stand-alone locations

## CATEGORY DATA

Table 14 - Cafés/Bars by Category: Units/Outlets 2018-2023

Table 15 - Sales in Cafés/Bars by Category: Number of Transactions 2018-2023

Table 16 - Sales in Cafés/Bars by Category: Foodservice Value 2018-2023

Table 17 - Cafés/Bars by Category: % Units/Outlets Growth 2018-2023

Table 18 - Sales in Cafés/Bars by Category: % Transaction Growth 2018-2023

Table 19 - Sales in Cafés/Bars by Category: % Foodservice Value Growth 2018-2023

Table 20 - GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2019-2023

Table 21 - GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2020-2023

Table 22 - Forecast Cafés/Bars by Category: Units/Outlets 2023-2028

Table 23 - Forecast Sales in Cafés/Bars by Category: Number of Transactions 2023-2028

Table 24 - Forecast Sales in Cafés/Bars by Category: Foodservice Value 2023-2028

Table 25 - Forecast Cafés/Bars by Category: % Units/Outlets Growth 2023-2028

Table 26 - Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2023-2028

Table 27 - Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2023-2028

## Full-Service Restaurants in Indonesia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Full-service restaurants suffer from lack of affordability compared to other outlet types

Pizza Hut retains its leading position

Local players offer value-for-money buffet concept

### PROSPECTS AND OPPORTUNITIES

Positive growth expected, in line with improving economic outlook

Increased use of advanced technology and unique experiences

Home delivery offers scope for further development

### CATEGORY DATA

Table 28 - Full-Service Restaurants by Category: Units/Outlets 2018-2023

Table 29 - Sales in Full-Service Restaurants by Category: Number of Transactions 2018-2023

Table 30 - Sales in Full-Service Restaurants by Category: Foodservice Value 2018-2023

Table 31 - Full-Service Restaurants by Category: % Units/Outlets Growth 2018-2023

Table 32 - Sales in Full-Service Restaurants by Category: % Transaction Growth 2018-2023

Table 33 - Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2018-2023

Table 34 - GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2019-2023

Table 35 - GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2020-2023

Table 36 - Forecast Full-Service Restaurants by Category: Units/Outlets 2023-2028

Table 37 - Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2023-2028

Table 38 - Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2023-2028

Table 39 - Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2023-2028

Table 40 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2023-2028

Table 41 - Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2023-2028

## Limited-Service Restaurants in Indonesia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Positive growth in 2023, but transactions have yet to recover to pre-pandemic levels

McDonald's retains its lead, thanks to strategy of outlet expansion and consistent promotions

Players continue to invest in digital services

### PROSPECTS AND OPPORTUNITIES

Continued healthy growth, thanks to promotional strategies of leading players

Chained Asian limited-service restaurants will be key contributor to growth

Mie Gacoan will gain traction while international players could struggle in face of ties with Israel

### CATEGORY DATA

Table 42 - Limited-Service Restaurants by Category: Units/Outlets 2018-2023

Table 43 - Sales in Limited-Service Restaurants by Category: Number of Transactions 2018-2023

Table 44 - Sales in Limited-Service Restaurants by Category: Foodservice Value 2018-2023

Table 45 - Limited-Service Restaurants by Category: % Units/Outlets Growth 2018-2023

Table 46 - Sales in Limited-Service Restaurants by Category: % Transaction Growth 2018-2023

Table 47 - Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2018-2023

Table 48 - GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2019-2023

Table 49 - GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2020-2023

Table 50 - Forecast Limited-Service Restaurants by Category: Units/Outlets 2023-2028

Table 51 - Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2023-2028

Table 52 - Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2023-2028

Table 53 - Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2023-2028

Table 54 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2023-2028

Table 55 - Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2023-2028

## Self-Service Cafeterias in Indonesia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Stagnant performance in 2023

Hypermart and Ikea experience positive growth

Local menus still dominate

#### PROSPECTS AND OPPORTUNITIES

Far from promising outlook, due to declining fortunes of hypermarket format

Introduction of more varied menus

Ikea Restaurant is set to continue to expand

#### CATEGORY DATA

Table 56 - Self-Service Cafeterias: Units/Outlets 2018-2023

Table 57 - Sales in Self-Service Cafeterias: Number of Transactions 2018-2023

Table 58 - Sales in Self-Service Cafeterias: Foodservice Value 2018-2023

Table 59 - Sales in Self-Service Cafeterias: % Units/Outlets Growth 2018-2023

Table 60 - Sales in Self-Service Cafeterias: % Transaction Growth 2018-2023

Table 61 - Sales in Self-Service Cafeterias: % Foodservice Value Growth 2018-2023

Table 62 - GBO Company Shares in Chained Self-Service Cafeterias: % Foodservice Value 2019-2023

Table 63 - GBN Brand Shares in Chained Self-Service Cafeterias: % Foodservice Value 2020-2023

Table 64 - Forecast Self-Service Cafeterias: Units/Outlets 2023-2028

Table 65 - Forecast Sales in Self-Service Cafeterias: Number of Transactions 2023-2028

Table 66 - Forecast Sales in Self-Service Cafeterias: Foodservice Value 2023-2028

Table 67 - Forecast Self-Service Cafeterias: % Units/Outlets Growth 2023-2028

Table 68 - Forecast Sales in Self-Service Cafeterias: % Transaction Growth 2023-2028

Table 69 - Forecast Sales in Self-Service Cafeterias: % Foodservice Value Growth 2023-2028

## Street Stalls/Kiosks in Indonesia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Another year of positive growth in 2023

Mixue sees buoyant performance, thanks to increase in number of outlets

Bubble teas and iced drinks remain popular choice with younger consumers

#### PROSPECTS AND OPPORTUNITIES

Full recovery expected by 2024

Beverages and fried chicken will remain key contributors to growth

QRIS digital payments will gain popularity

## CATEGORY DATA

Table 70 - Street Stalls/Kiosks: Units/Outlets 2018-2023

Table 71 - Sales in Street Stalls/Kiosks: Number of Transactions 2018-2023

Table 72 - Sales in Street Stalls/Kiosks: Foodservice Value 2018-2023

Table 73 - Street Stalls/Kiosks: % Units/Outlets Growth 2018-2023

Table 74 - Sales in Street Stalls/Kiosks: % Transaction Growth 2018-2023

Table 75 - Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2018-2023

Table 76 - GBO Company Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2019-2023

Table 77 - GBN Brand Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2020-2023

Table 78 - Forecast Street Stalls/Kiosks: Units/Outlets 2023-2028

Table 79 - Forecast Sales in Street Stalls/Kiosks: Number of Transactions 2023-2028

Table 80 - Forecast Sales in Street Stalls/Kiosks: Foodservice Value 2023-2028

Table 81 - Forecast Street Stalls/Kiosks: % Units/Outlets Growth 2023-2028

Table 82 - Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2023-2028

Table 83 - Forecast Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2023-2028

## Consumer Foodservice By Location in Indonesia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Revival of tourism sparks growth in travel, lodging and leisure locations

Retail locations benefit from increase in mall visitor numbers

#### PROSPECTS AND OPPORTUNITIES

Number of transactions will recover in three years

Travel locations will see most dynamic performance

## CATEGORY DATA

Table 84 - Consumer Foodservice by Location: Units/Outlets 2018-2023

Table 85 - Sales in Consumer Foodservice by Location: Number of Transactions 2018-2023

Table 86 - Sales in Consumer Foodservice by Location: Foodservice Value 2018-2023

Table 87 - Consumer Foodservice by Location: % Units/Outlets Growth 2018-2023

Table 88 - Sales in Consumer Foodservice by Location: % Transaction Growth 2018-2023

Table 89 - Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2018-2023

Table 90 - Consumer Foodservice through Standalone: Units/Outlets 2018-2023

Table 91 - Sales in Consumer Foodservice through Standalone: Number of Transactions 2018-2023

Table 92 - Sales in Consumer Foodservice through Standalone: Foodservice Value 2018-2023

Table 93 - Consumer Foodservice through Standalone: % Units/Outlets Growth 2018-2023

Table 94 - Sales in Consumer Foodservice through Standalone: % Transaction Growth 2018-2023

Table 95 - Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2018-2023

Table 96 - Consumer Foodservice through Leisure: Units/Outlets 2018-2023

Table 97 - Sales in Consumer Foodservice through Leisure: Number of Transactions 2018-2023

Table 98 - Sales in Consumer Foodservice through Leisure: Foodservice Value 2018-2023

Table 99 - Consumer Foodservice through Leisure: % Units/Outlets Growth 2018-2023

Table 100 - Sales in Consumer Foodservice through Leisure: % Transaction Growth 2018-2023

Table 101 - Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2018-2023

Table 102 - Consumer Foodservice through Retail: Units/Outlets 2018-2023

Table 103 - Sales in Consumer Foodservice through Retail: Number of Transactions 2018-2023

Table 104 - Sales in Consumer Foodservice through Retail: Foodservice Value 2018-2023

Table 105 - Consumer Foodservice through Retail: % Units/Outlets Growth 2018-2023

Table 106 - Sales in Consumer Foodservice through Retail: % Transaction Growth 2018-2023

Table 107 - Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2018-2023

Table 108 - Consumer Foodservice through Lodging: Units/Outlets 2018-2023

Table 109 - Sales in Consumer Foodservice through Lodging: Number of Transactions 2018-2023

Table 110 - Sales in Consumer Foodservice through Lodging: Foodservice Value 2018-2023

Table 111 - Consumer Foodservice through Lodging: % Units/Outlets Growth 2018-2023

Table 112 - Sales in Consumer Foodservice through Lodging: % Transaction Growth 2018-2023

Table 113 - Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2018-2023

Table 114 - Consumer Foodservice through Travel: Units/Outlets 2018-2023

Table 115 - Sales in Consumer Foodservice through Travel: Number of Transactions 2018-2023

Table 116 - Sales in Consumer Foodservice through Travel: Foodservice Value 2018-2023

Table 117 - Consumer Foodservice through Travel: % Units/Outlets Growth 2018-2023

Table 118 - Sales in Consumer Foodservice through Travel: % Transaction Growth 2018-2023

Table 119 - Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2018-2023

Table 120 - Forecast Consumer Foodservice by Location: Units/Outlets 2023-2028

Table 121 - Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2023-2028

Table 122 - Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2023-2028

Table 123 - Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2023-2028

Table 124 - Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2023-2028

Table 125 - Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2023-2028

Table 126 - Forecast Consumer Foodservice through Standalone: Units/Outlets 2023-2028

Table 127 - Forecast Sales in Consumer Foodservice through Standalone: Number of Transactions 2023-2028

Table 128 - Forecast Sales in Consumer Foodservice through Standalone: Foodservice Value 2023-2028

Table 129 - Forecast Consumer Foodservice through Standalone: % Units/Outlets Growth 2023-2028

Table 130 - Forecast Sales in Consumer Foodservice through Standalone: % Transaction Growth 2023-2028

Table 131 - Forecast Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2023-2028

Table 132 - Forecast Consumer Foodservice through Leisure: Units/Outlets 2023-2028

Table 133 - Forecast Sales in Consumer Foodservice through Leisure: Number of Transactions 2023-2028

Table 134 - Forecast Sales in Consumer Foodservice through Leisure: Foodservice Value 2023-2028

Table 135 - Forecast Consumer Foodservice through Leisure: % Units/Outlets Growth 2023-2028

Table 136 - Forecast Sales in Consumer Foodservice through Leisure: % Transaction Growth 2023-2028

Table 137 - Forecast Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2023-2028

Table 138 - Forecast Consumer Foodservice through Retail: Units/Outlets 2023-2028

Table 139 - Forecast Sales in Consumer Foodservice through Retail: Number of Transactions 2023-2028

Table 140 - Forecast Sales in Consumer Foodservice through Retail: Foodservice Value 2023-2028

Table 141 - Forecast Consumer Foodservice through Retail: % Units/Outlets Growth 2023-2028

Table 142 - Forecast Sales in Consumer Foodservice through Retail: % Transaction Growth 2023-2028

Table 143 - Forecast Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2023-2028

Table 144 - Forecast Consumer Foodservice through Lodging: Units/Outlets 2023-2028

Table 145 - Forecast Sales in Consumer Foodservice through Lodging: Number of Transactions 2023-2028

Table 146 - Forecast Sales in Consumer Foodservice through Lodging: Foodservice Value 2023-2028

Table 147 - Forecast Consumer Foodservice through Lodging: % Units/Outlets Growth 2023-2028

Table 148 - Forecast Sales in Consumer Foodservice through Lodging: % Transaction Growth 2023-2028

Table 149 - Forecast Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2023-2028

Table 150 - Forecast Consumer Foodservice through Travel: Units/Outlets 2023-2028

Table 151 - Forecast Sales in Consumer Foodservice through Travel: Number of Transactions 2023-2028

Table 152 - Forecast Sales in Consumer Foodservice through Travel: Foodservice Value 2023-2028

Table 153 - Forecast Consumer Foodservice through Travel: % Units/Outlets Growth 2023-2028

Table 154 - Forecast Sales in Consumer Foodservice through Travel: % Transaction Growth 2023-2028

Table 155 - Forecast Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2023-2028

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research

spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/consumer-foodservice-in-indonesia/report](http://www.euromonitor.com/consumer-foodservice-in-indonesia/report).