

INDONESIA FOODSERVICE MARKET SIZE & SHARE

ANALYSIS - GROWTH TRENDS & FORECASTS UP TO 2030

The Indonesia Foodservice Market is segmented by Foodservice Type (Cafes & Bars, Cloud Kitchen, Full Service Restaurants, Quick Service Restaurants), by Outlet (Chained Outlets, Independent Outlets) and by Location (Leisure, Lodging, Retail, Standalone, Travel). Market Value in USD is presented. Key data points observed include the number of outlets for each foodservice channel; and, average order value in USD by foodservice channel.

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Indonesia Foodservice Market Size

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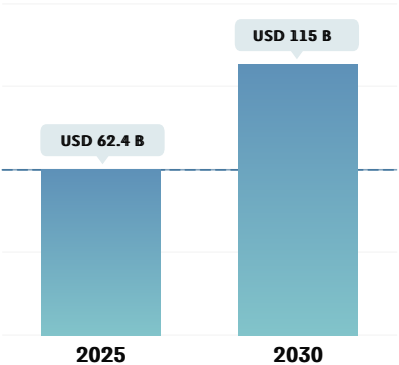
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Indonesia Foodservice Market








Market Size in USD Billion

CAGR 13.00%



Source: Mordor Intelligence



 Study Period	2017 - 2030
 Market Size (2025)	USD 62.4 Billion
 Market Size (2030)	USD 115 Billion
 Largest Share by Foodservice Type	Full Service Restaurants
 CAGR (2025 - 2030)	13.00 %
 Fastest Growing by Foodservice Type	Cafes & Bars
 Market Concentration	Low

Major Players

 **Domino's**

 **LACTALIS**

 **MAP**
Mitra Adiperkasa

 **REKSO**
since 1945

 **Pindul Company**

*Disclaimer: Major Players sorted in no particular order

COMPARE MARKET SIZE AND GROWTH OF INDONESIA FOODSERVICE MARKET WITH OTHER MARKETS IN **FOOD & BEVERAGE** INDUSTRY

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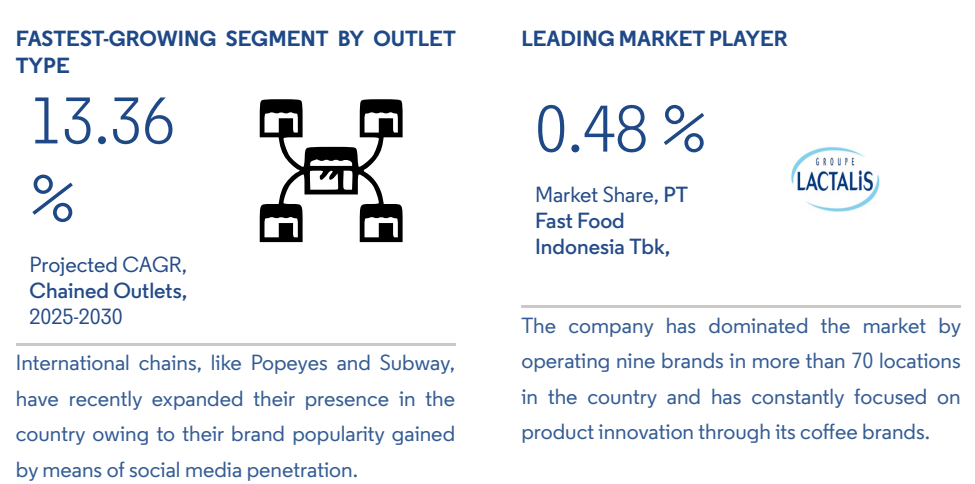
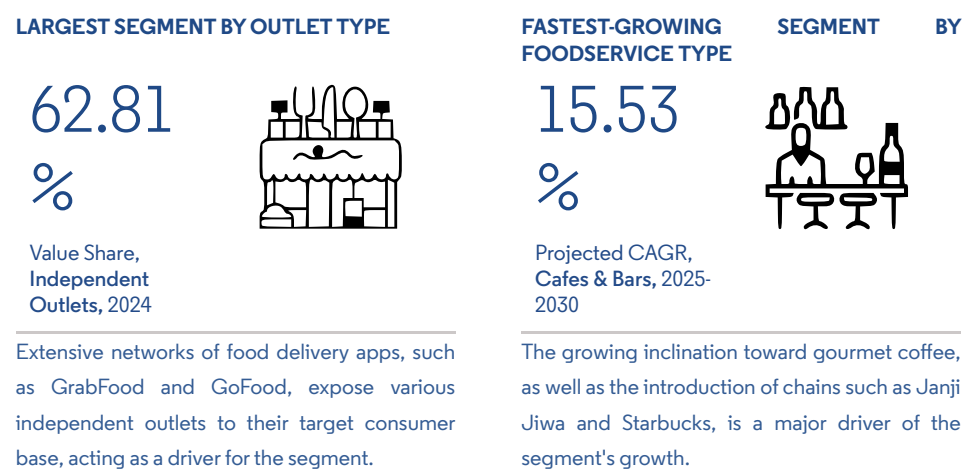
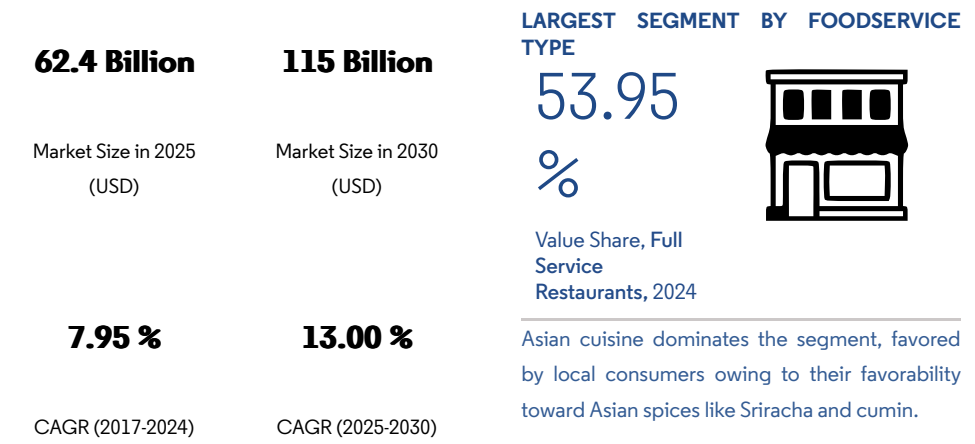
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Indonesia Foodservice Market Analysis

The Indonesia Foodservice Market size is estimated at 62.4 billion USD in 2025, and is expected to reach 115 billion USD by 2030, growing at a CAGR of 13.00% during the forecast period (2025-2030).

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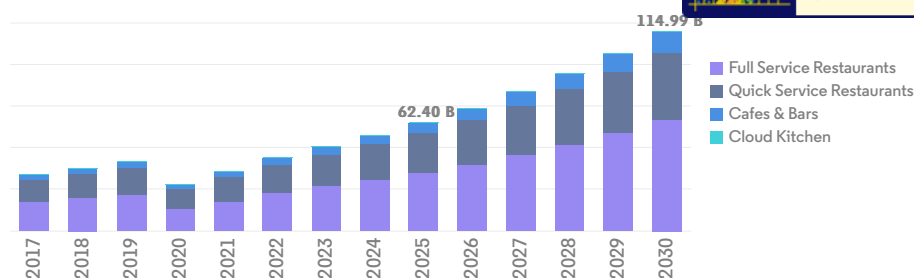
INDONESIA FOODSERVICE MARKET SIZE & SHARE ANALYSIS - GROWTH TRENDS & FORECASTS UP TO 2030

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Key Market Trends	gastronomic diversity. The most popular cuisines in the country are Chinese, Japanese, and Indian. Due to the demand for traditional Cantonese and Taiwanese culinary choices in upscale restaurants, Chinese cuisine has remained popular among all other Asian cuisines.
Competitive Landscape	<ul style="list-style-type: none"> Cloud kitchens are projected to register a CAGR of 13.49% by value during the forecast period. Cloud kitchens offer a wide variety of cuisines to cater to the diverse palate of Indonesian consumers. From traditional Indonesian dishes to international cuisine, cloud kitchens offer a range of options to satisfy consumers. Hangry is one of the most popular cloud kitchens in Indonesia. It offers a variety of cuisine options, including Indonesian, Chinese, Japanese, and Western. Similarly, Mama Roz is a halal-certified cloud kitchen brand that specializes in Middle Eastern and Mediterranean cuisines.
Major Players	
Recent Developments	
Free With This Report	
TABLE OF CONTENTS	<ul style="list-style-type: none"> The quick service restaurants (QSRs) segment holds the second major share by foodservice type. It is projected to register a CAGR of 5.49% during the study period. In Indonesia, quick independent services are expanding as consumers prefer traditional and local fast food with healthier, high-quality food. The growth of food delivery services such as GrabFood and GoFood has made it easier for QSRs to reach customers with limited access to physical locations. This has increased the demand for QSRs to expand their delivery capabilities and reach more customers.
LIST OF TABLES & FIGURES	
SCOPE OF THE REPORT	

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Value of Foodservice Market by foodservice type, USD, Indonesia 2017 - 2030



Source: Mordor Intelligence



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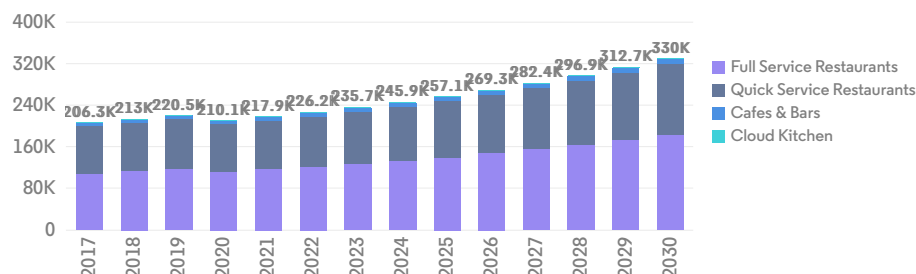
Indonesia Foodservice Market Trends

Full service restaurants dominate the market and the rise of cloud kitchens indicates a growing trend in the food delivery industry

- Cloud kitchen is the fastest-growing foodservice type in the market studied. It is projected to register a CAGR of 6.75% during the forecast period. One of the factors contributing to the growth of cloud kitchens in Indonesia is the increasing demand for food delivery services. With the rise of e-commerce and the increasing popularity of food delivery apps such as GoFood, GrabFood, and Foodpanda, more consumers are opting for food delivery services rather than dining in at a physical restaurant. Several companies have already entered the cloud kitchen market in Indonesia, including Rebel Foods, which operates under the brand name Faasos, and KITCHEN by KONC, a partnership between KONC Ventures and Waresix. These companies are expanding their operations and opening new cloud kitchens in various cities across Indonesia to meet the growing demand for food delivery services.
- Full-service restaurants (FSRs) held a major market share of around 54.11% in 2022. Indonesia is a diverse country with various regions and ethnicities, each with unique cuisine. Full service restaurants offer various cuisines, from local Indonesian to international, catering to different tastes and preference wide range of cuisines, such as French, Italian, Thai, Chinese, and Indian, are available in major tou

places in the country. QSRs are expected to register a steady sales growth of 4.20% during the forecast period. Quick service chains that offer burgers, pizza, fried chicken, and sandwiches are all very popular in Indonesia. Further, these chains are rapidly expanding in the market studied. McDonald's has been expanding its operations in Indonesia, and as of now, it is operating 200 restaurants in the country. Similarly, Burger King has been expanding its operations in the country and has around 175 outlets across 24 cities in Indonesia.

Number of Outlet Units by Foodservice Channels, Indonesia, 2017 - 2030



Source: Mordor Intelligence



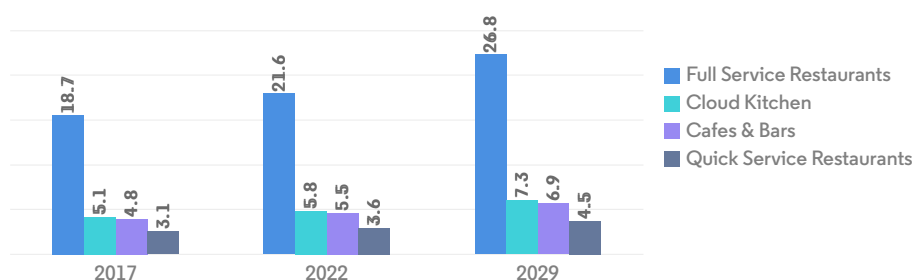
Understand The Key Trends Shaping This Market

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Full service restaurants lead the way with popular local dishes like nasi putih and ayam bakar

- In Indonesia, the average order was the highest in the full-service restaurant (FSR) category in 2022, compared to other foodservice types, with a price of USD 21.57. The demand for FSRs is expected to increase with the growth in tourism and tourists preferring to explore the local cuisine of Indonesia. Also, professionally trained chefs offer innovative menus, international cuisine, and proprietary recipes to satisfy tourists and health-conscious consumers. In 2022, popular cuisines offered in the country included Nasi Putih and Ayam Bakar, priced at USD 6.8 and USD 10 per 300 g, respectively. As the appetites of the tourists for local cuisine grow, the average order value for FSRs rose by 15.16% over the study period.
- The average order value for the cafes & bars segment was USD 5.54 in 2022. As specialty coffee has become popular, Indonesian cafés & bars have increased the variety of coffees they offer. Due to the increasing demand, many cafés and bars provide a variety of specialized coffees on their menus. Coffee drinks, including latte, moca, espresso, and cappuccino, cost USD 1.8 per 150 mL in the country. Consumers are also looking for a combination of food with new and bold flavor blends in cocktails. The demand for innovative and exotic foods comes mainly from millennials. As a result, operators may have to compete for the most compelling offering due to the shift in consumer demand.
- The emergence of meal delivery apps in Indonesia, such as GoFood, GrabFood, Segari, Zomato, and Chatime Indonesia, has become a strong force in the food delivery industry, enabling the cloud kitchen model to scale better. Popular dishes offered by the cloud kitchens are pizza (USD 3.5 per 300 g), chicken wings (USD 2.5 per 300 g), burgers (USD 2.8 per 300 g), Tahu, Nasi Putih, and many more.

Average Order Value by Foodservice Channels, USD, Indonesia, 2017 Vs 2022 Vs 2029



Source: Mordor Intelligence





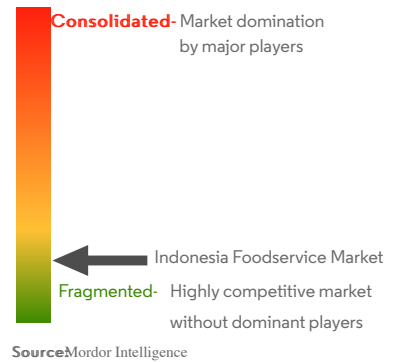
Indonesia Foodservice Industry Overview

The Indonesia Foodservice Market is fragmented, with the top five companies occupying 1.48%. The major players in this market are PT Dom Pizza Indonesia, PT Fast Food Indonesia Tbk, PT Mitra Adiperkasa Tbk, PT Rekso Nasional Food and PT Sarimelati Kencana Tbk (sorted alphabetically).

Indonesia Foodservice Market Leaders

- 1 PT Dom Pizza Indonesia
- 2 PT Fast Food Indonesia Tbk
- 3 PT Mitra Adiperkasa Tbk
- 4 PT Rekso Nasional Food
- 5 PT Sarimelati Kencana Tbk

Market Concentration



Other important companies include Inspire Brands, Inc., Jiwa Group, Kulo Group, PT Bumi Berkah Boga, PT Eka Bogainti, PT JCO Donut & Coffee, PT Richeese Kuliner Indonesia, Restaurant Brands Asia Limited, The Wendy's Company.

*Disclaimer: Major Players sorted in alphabetical order.



Indonesia Foodservice Market News

- **January 2023:** Restaurants Brand Asia launched Popeyes in Indonesia. Popeyes opened four restaurants in Margo City Mall, Supermal Karawaci, and Skyli.
- **January 2023:** Popeyes introduced the new Shrimp Roll to its seafood menu.
- **October 2022:** Indonesia's local burger chain, Flip Burger, partnered with Kenangan Brands in Indonesia.

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We provide a complimentary and exhaustive set of data points on regional and country level metrics that present the fundamental structure of the industry. Presented in the form of 60+ free charts, the section covers difficult to find data on various countries on number of outlets, average order values, and menu analysis by foodservice channels, cuisine specific insights related to full service restaurants and quick service restaurants, market trends and market size insights on cafes, bars & pubs, juice/smoothies bars, specialty tea and coffee shops, and cloud kitchen etc.