



Euromonitor  
International

# Limited-Service Restaurants in Indonesia

April 2025

Table of Contents

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Weakened consumer purchasing power and boycott movements impact growth of limited-service restaurants in 2024
- Local brands thrive amid competition and market shifts in 2024
- Price-sensitive consumers seek more affordable options in 2024

PROSPECTS AND OPPORTUNITIES

- Intensified competition and brand strategies heading into the forecast period
- Third-party delivery services set to maintain growth over the forecast period
- Brands to further adapt to attract price-sensitive consumers

CATEGORY DATA

- Table 1 - Limited-Service Restaurants by Category: Units/Outlets 2019-2024
- Table 2 - Sales in Limited-Service Restaurants by Category: Number of Transactions 2019-2024
- Table 3 - Sales in Limited-Service Restaurants by Category: Foodservice Value 2019-2024
- Table 4 - Limited-Service Restaurants by Category: % Units/Outlets Growth 2019-2024
- Table 5 - Sales in Limited-Service Restaurants by Category: % Transaction Growth 2019-2024
- Table 6 - Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2019-2024
- Table 7 - GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2020-2024
- Table 8 - GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2021-2024
- Table 9 - Forecast Limited-Service Restaurants by Category: Units/Outlets 2024-2029
- Table 10 - Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2024-2029
- Table 11 - Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2024-2029
- Table 12 - Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2024-2029
- Table 13 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2024-2029
- Table 14 - Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2024-2029

Consumer Foodservice in Indonesia - Industry Overview

EXECUTIVE SUMMARY

- Consumer foodservice in 2024: The big picture
- 2024 key trends
- Competitive landscape
- Independent foodservice developments
- What next for consumer foodservice?

MARKET DATA

- Table 15 - Units, Transactions and Value Sales in Consumer Foodservice 2019-2024
- Table 16 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2019-2024
- Table 17 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2024
- Table 18 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2019-2024
- Table 19 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2019-2024
- Table 20 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2024
- Table 21 - Sales in Consumer Foodservice by Location: % Foodservice Value 2019-2024
- Table 22 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2019-2024
- Table 23 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2020-2024
- Table 24 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2024
- Table 25 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2024
- Table 26 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2024-2029
- Table 27 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2024-2029

## DISCLAIMER

## SOURCES

### Summary 1 - Research Sources

#### 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/limited-service-restaurants-in-indonesia/report](http://www.euromonitor.com/limited-service-restaurants-in-indonesia/report).