

Indonesia Foodservice - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The Indonesia Foodservice Market size is estimated at USD 55.25 billion in 2024, and is expected to reach USD 103.76 billion by 2029, growing at a CAGR of 13.43% during the forecast period (2024-2029).

The popularity of Chinese, Japanese, and India cuisine drives the growth of the market

- The full-service restaurants (FSRs) segment holds the major market share by foodservice type. It is projected to register a CAGR of 13.95% by value during the forecast period. The popularity of Asian cuisines has expanded, especially among the younger population, due to the growing need for 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.

- 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.

- 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.

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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 preferences. A wide range of cuisines, such as French, Italian, Thai, Chinese, and Indian, are available in major tourist 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.

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 cafes & bars have increased the variety of coffees they offer. Due to the increasing demand, many cafes 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

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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.

Indonesia Foodservice Industry Overview

The Indonesia Foodservice Market is fragmented, with the top five companies occupying 1.29%. 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).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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