

Indonesia's Cloud Kitchen Scene Heats Up as Grab and Gojek Drive Strategic Shifts and Tier-2/3 City Opportunities

Indonesia's cloud kitchen market expands as Grab and Gojek lead digital F&B growth, with Tier-2/3 cities emerging as key fulfillment hubs.

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-- [Indonesia's dark kitchen and fulfillment center market](#) is witnessing steady expansion, fueled by rising consumer demand, urbanization, and the digitization of food and beverage (F&B) operations. The nation's F&B landscape is undergoing a structural shift that is redefining how food is prepared, stored, and delivered.



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Indonesia is fast emerging as Southeast Asia's digital food and fulfillment center, with Tier-2/3 cities, dark kitchens, and tech-driven F&B innovation driving the next wave of digital commerce.”

Ruchika Rana

According to Makreio Research, the Indonesia Dark Kitchen and Fulfillment Center Market is expected to grow steadily through 2030, supported by:

- Surging online food delivery volumes
- Delivery-first business models
- Strategic entry of domestic and global aggregators
- The extension of digital commerce beyond metropolitan hubs into emerging cities

As a result, Indonesia is establishing itself as a key player in Southeast Asia's evolving digital food economy, where culinary entrepreneurs, technology platforms, and logistics

providers are reshaping operational efficiency and customer experience.

Dark Kitchens and Fulfillment Centers Reshape Indonesia's Retail Economy -

The pandemic-era digital acceleration has permanently altered Indonesia's food consumption landscape. Between 2021 and 2023, dark kitchens emerged as the operational backbone of

delivery-first models, serving a population increasingly accustomed to low-contact, on-demand dining. Operators such as GrabKitchen, GoFood Shared Kitchen, Yummy Corp, and Hangry capitalized on this behavioral shift, expanding beyond metropolitan Jakarta into Tier-II cities.

Indonesia's retail sector reached USD 150 billion in 2024, contributing nearly 13% to national GDP. Tier-2 and Tier-3 cities generated IDR 306 trillion of digital economic activity in 2023, an impressive 73% of the regional total (IDR 419 trillion), highlighting their growing strategic importance. The study emphasizes that these rising urban centers, supported by micro-fulfillment hubs, are redefining how Indonesia's digital commerce supply chains operate.

F&B Expansion Fuels Indonesia Dark Kitchen Growth -

Indonesia's food and beverage (F&B) industry continues to outperform broader economic growth, serving as the backbone of the country's expanding dark kitchen ecosystem. The sector recorded a 5.8% year-on-year growth in Q3 2024, compared with 4.9% GDP growth, according to Bank Indonesia. With 4.85 million active F&B businesses in 2023, up 21.13% since 2016, Indonesia's culinary economy is entering a phase where scalability and infrastructure modernization are critical for sustained competitiveness.

Independent operators now shape Indonesia's digital dining landscape. A Measurable AI study (January 2024) found that independent restaurants account for 75% of GrabFood Indonesia's total orders and GMV, compared to 25% from franchise chains, reflecting a decentralized F&B economy driven by digital-first entrepreneurs and cloud kitchen innovators.

Investment-Driven Growth and Market Consolidation in Indonesia's Dark Kitchen Sector -

Fueled by aggressive investment, Indonesia's dark kitchen sector recorded over 40% year-on-year growth between 2022 and 2023, reaching USD 675.45 million in market value.

Major developments include:

- DailyCo and YummyCorp finalizing share swap agreements to strengthen B2B food service partnerships and operational synergies.



- Hangry secured USD 22 million in funding to acquire brands and accelerate its regional expansion strategy.
- GoTo Group raised USD 150 million, including USD 125 million from IFC and USD 25 million from Franke & Co., to enhance its fintech and GoFood ecosystems.

These strategic infusions highlight the convergence of digital platforms, food service innovation, and logistics modernization, marking Indonesia's next growth phase in delivery and cloud-based fulfillment.

Indonesia's Logistics Backbone - Tier-1 and Tier 2/3 Cities Growth Corridors -

Indonesia's logistics and fulfillment ecosystem is evolving through a dual-centered growth model, Tier-1 infrastructure consolidation and Tier-2/3 digital expansion, creating a balanced framework for the nation's digital commerce and F&B delivery network.

Tier-1 metropolitan clusters continue to anchor Indonesia's logistics strength.

- Jakarta, handling over 50% of national container traffic via Port Tanjung Priok, is strengthening its distribution efficiency through new toll corridors and MRT connectivity, enhancing warehouse linkages and delivery reliability.
- Surabaya-Gresik, powered by the Java Integrated Industrial and Ports Estate (JIPE), integrates deep-sea logistics with industrial freight operations, ensuring smooth cargo flow across East Java and supporting large-scale e-commerce fulfillment.

Complementing these established corridors, Tier-2 and Tier-3 cities are fast emerging as Indonesia's next growth frontier. By 2027, their combined digital economic output is projected to reach IDR 568 trillion, accounting for 71% of regional value (IDR 803 trillion). These markets are evolving into critical nodes for dark kitchens, micro-fulfillment centers, and regional logistics clusters, propelled by rising disposable incomes and digital consumption.

The government's plan to allocate 60% of its USD 400 billion infrastructure investment toward transport and logistics modernization will further decentralize economic activity, connecting emerging cities with national supply chains. This coordinated infrastructure push, spanning ports, highways, and urban logistics parks, is establishing Indonesia as Southeast Asia's most dynamic fulfillment and F&B delivery hub.

What Lies Ahead for Indonesia's Dark Kitchen and Fulfillment Center Market?

Makreo Research's latest report, "Indonesia Dark Kitchen and Fulfillment Center Market (2021–2030)", presents an in-depth assessment of this dynamic sector, providing valuable insights into the structural changes shaping Indonesia's food delivery and logistics landscape.

The report explores:

- Market size, growth forecasts, and key performance insights for Indonesia's dark kitchen and fulfillment sectors.

- Competitive benchmarking of leading players driving digital F&B transformation.
- Assessment of fulfillment center expansion, logistics efficiency, and investment activity.
- Case studies highlighting Indonesia's top food tech and delivery ecosystems.
- Emerging opportunities in automation, sustainability, and digital infrastructure.

More...

This intelligence enables investors, logistics leaders, and F&B operators to identify growth hotspots, assess competitive positioning, and align strategies with Indonesia's digital-first food and logistics transformation. Supported by strong economic growth and rising investor interest, Indonesia remains one of Southeast Asia's most dynamic delivery and fulfillment markets.

About Makreo Research and Consulting

Makreo Research and Consulting is a global market intelligence firm headquartered in India, providing research, consulting, and data-driven strategy solutions. The company specializes in market analysis, feasibility studies, and business consulting across logistics, food and beverage, e-commerce, manufacturing, and other high-growth sectors.

Backed by a strong regional network and a commitment to data accuracy, we deliver actionable insights that help organizations worldwide make informed, market-aligned decisions in an evolving global landscape.

Related Reports:

[Brazil Hyperlocal Delivery and Dark Kitchen Market \(2021-2030\)](#)

For tailored insights or specific market inquiries, explore our comprehensive library of [Logistics and Warehousing Reports](#).

Ruchika Rana

Makreo Research and Consulting

sales@makreo.com

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