



Consumer Foodservice in Brazil

March 2026

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Consumer Foodservice in Brazil

EXECUTIVE SUMMARY

Performance softens as inflation and high interest rates weigh on demand

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Macroeconomic pressures slow momentum

Chinese entrants intensify competition in delivery platforms

Loyalty programmes reinforce frequency for large operators

WHAT'S NEXT?

Growth to remain capped by interest rates and constrained purchasing power

Policy changes and the 2026 calendar expected to create short-cycle demand lifts

Menu and pricing strategies are expected to adjust as weight-loss injectables expand

COMPETITIVE LANDSCAPE

Large multi-brand groups remain the leading operators

Boali scales quickly through acquisitions and delivery-led learnings

Consolidation and new international entrants are expected to reshape competition

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Independent outlets remain the main route to market, but financial fragility is a constraint

Chains gain share as delivery and retail locations remain dynamic

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Trading stays subdued as inflation squeezes micro-entrepreneurs

INDUSTRY PERFORMANCE

Pressure on household budgets and a spirits safety shock weigh on 2025

Health positioning supports juice, smoothie and coffee-led growth pockets
Eat-in leads as rapid delivery and takeaway expand beverage access

WHAT'S NEXT?

Demand should hold steady, with event-driven peaks and health-led growth pockets
Eat-in to remain central, while beverage delivery and platform rivalry intensify
Consolidation and professional management likely to expand in a fragmented category

COMPETITIVE LANDSCAPE

McCafé leads by leveraging McDonald's footprint and a stronger breakfast offer
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2025 DEVELOPMENTS

Premium players outperform as independents absorb cost pressure

INDUSTRY PERFORMANCE

Inflation and shifting consumer priorities limit value growth in 2025
North American casual dining drives the strongest growth within full-service restaurants
Eat-in leads, while delivery remains small due to ticket size and fee economics

WHAT'S NEXT?

Macroeconomic conditions and lifestyle shifts weigh on constant value sales
Experience-led propositions should keep eat-in ahead, while delivery faces regulatory and fee uncertainty
Consolidation set to accelerate as groups seek scale in a fragmented landscape

COMPETITIVE LANDSCAPE

Outback Steakhouse leads and accelerates expansion under new ownership structure
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Limited-Service Restaurants in Brazil

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2025 DEVELOPMENTS

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INDUSTRY PERFORMANCE

Promotions intensify as traffic falls and consumers reallocate discretionary spend

Ice cream chains grow as product innovation reduces seasonality and fuels franchising

Delivery overtakes eat-in as Chinese entrants raise competitive pressure

WHAT'S NEXT?

Tax reforms and 2026 events to lift demand despite modest economic growth

Intensifying platform competition should reshape fees and channel mix

Sustainability requirements set to accelerate adoption among larger chains

COMPETITIVE LANDSCAPE

McDonald's leads as digitalisation and value offers intensify

Boali expands via acquisitions and franchise engagement

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Self-Service Cafeterias in Brazil

KEY DATA FINDINGS

2025 DEVELOPMENTS

Lunch-led formats lose momentum as hybrid work and informal competition intensify

INDUSTRY PERFORMANCE

Cost inflation and lower footfall drive minimal growth in 2025

Chained self-service cafeterias outpace independents despite contraction among smaller players

Eat-in leads as takeaway remains secondary within a lunchtime model

WHAT'S NEXT?

Structural demand pressure will drive category decline over 2026–2030

Eat-in to remain ahead, while takeaway grows slowly from a low base

Fragmentation is expected to limit innovation, although low-cost franchise models expand delivery-only options

COMPETITIVE LANDSCAPE

Divino Fogão leads and expands through delivery-only formats and retrofit investment

Chains remain limited as smaller operators reduce footprints

Independents retain leadership but face demand volatility and rising informal competition

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Informal trade gains share as consumers trade down and kiosk formats adapt

INDUSTRY PERFORMANCE

Budget pressure shifts demand towards informal vendors in 2025

Independent street stalls/kiosks see fastest growth as marmitas and quick snacks expand relevance

Takeaway and delivery gain share through outsourced fulfilment

WHAT'S NEXT?

Solid growth anticipated as informality remains attractive and 2026 events lift footfall
Delivery competition will intensify and increase cannibalisation across channels
On-the-go beverages set to become next high-growth kiosk proposition

COMPETITIVE LANDSCAPE

McDonald's leads by leveraging dessert kiosks and continued digital investment
The Nutty Bavarian expands through franchising and a café-style kiosk format
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[Consumer Foodservice By Location in Brazil](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Retail locations gain momentum, while standalone remains the core route to market

INDUSTRY PERFORMANCE

Shopping centres support higher throughput for chains
Standalone retains leadership as independents dominate and costs stay lower
Independents anchor eat-in, while delivery expands as a lower-cost growth lever

WHAT'S NEXT?

Retail location growth set to accelerate as new malls open
Standalone to stay ahead, but constant value sales will soften
Delivery competition and format innovation will widen growth options

COMPETITIVE LANDSCAPE

McDonald's leads in non-standalone thanks to scale and mall fit
McDonald's also tops standalone locations through network coverage and site discipline

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