



Self-Service Cafeterias in Chile

March 2026

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Self-Service Cafeterias in Chile - Category analysis

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2025 DEVELOPMENTS

Concentration as independents continue to struggle

INDUSTRY PERFORMANCE

Category momentum driven by a single scaled operator

Mobility and occasion shifts reshape foot traffic for selfservice cafeterias

Convenience and promotions shift spending away from selfservice formats

WHAT'S NEXT?

Moderate uplift expected as officelinked demand gradually returns

Casual eatin remains core as the format balances speed and experience

Incremental innovation and sustainability focus on operations not reinvention

COMPETITIVE LANDSCAPE

Rincón Jumbo leads selfservice cafeterias through structural advantage

Consumer loyalty and occasion expansion drive Rincón Jumbo's dynamism

Structural concentration defines selfservice cafeterias

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Consumer Foodservice in Chile - Industry Overview

EXECUTIVE SUMMARY

Players adapt to the environment with a shift towards efficiency and value-driven strategies

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INDUSTRY PERFORMANCE

Priced value gains in a highly competitive cost environment

Channel strategies adapt amid rising costs and normalisation of consumption

Loyalty shifts towards delivery ecosystems as restaurants lean on experience

WHAT'S NEXT?

Rising sales to be supported by value-offering formats and consumer confidence gains

Growth of Asianthemed formats shapes innovation in 2025

Sustainability advances slowly, driven mainly by regulation and consumer action

COMPETITIVE LANDSCAPE

Brand leadership is reinforced through value, convenience and channel reach
Little Caesar's Pizza shows dynamism through its signature Hot-N-Ready model
New entrants disrupt the competitive landscape

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Independents gain visibility through fast expansion and renewed demand
Innovation in independent highcuisine restaurants

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