



Consumer Foodservice in Chile

March 2026

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Consumer Foodservice in Chile

EXECUTIVE SUMMARY

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

KEY DATA FINDINGS

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 Asian-themed 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

CHANNELS

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

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Cafés/Bars in Chile

KEY DATA FINDINGS

2025 DEVELOPMENTS

Cafés/bars develop and gain momentum

INDUSTRY PERFORMANCE

Independents drive strong growth across cafés/bars

Independent specialist coffee and tea shops intensify the competition
Affordable luxury as a consumer tradeoff

WHAT'S NEXT?

Rising demand for social, experiential occasions to fuel growth
Experiential fulfillment to inform on-premise and takeaway sales
Tech-led formats blending aesthetics and automation in emerging concepts

COMPETITIVE LANDSCAPE

Starbucks maintains top position amid labour-related disruptions
Dunkin' is the most dynamic brand in 2025
Independents hold sway but chains dominate specialist coffee and tea shops

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[Full-Service Restaurants in Chile](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Gains from small, dynamic and large, established categories

INDUSTRY PERFORMANCE

Experiential dining and urban revival lift foodservice value sales
Middle Eastern concepts add dynamism as artisanal pizza gains scale
Eat-in dominates fulfillment while delivery retains an important complementary role

WHAT'S NEXT?

Social, accessible formats to sustain momentum in key full-service categories
Eat-in is set to retain primacy as delivery expands selectively
Sustainability to become embedded through industry-led standards

COMPETITIVE LANDSCAPE

Niu Sushi leads through scale, consistency and local relevance
Niu Sushi drives momentum via broad menu adaptability
Neighbourhood expansion and concept diversity maintain dominance of independents

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Limited-Service Restaurants in Chile

KEY DATA FINDINGS

2025 DEVELOPMENTS

Contrasting dynamics characterise limited-service restaurants

INDUSTRY PERFORMANCE

Upward trajectory in foodservice current value sales amid sharp variation across categories

Chicken format strengthens position through expansion and versatility

Delivery partnerships and mall footfall drive fulfillment efficiency

WHAT'S NEXT?

Positive outlook underpinned by scale, expansion and strong value appeal

Stronger mall traffic and delivery integration to shape fulfillment evolution

Copec to intensify competition through foodservice integration

COMPETITIVE LANDSCAPE

Aggressive pricing and product upgrades reinforce McDonald's leadership

Value positioning and digital activation fuel Little Caesar's Pizza's momentum

Independent Latin American concepts anchor value share in 2025

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Self-Service Cafeterias in Chile

KEY DATA FINDINGS

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

CATEGORY DATA

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Street Stalls/Kiosks in Chile

KEY DATA FINDINGS

2025 DEVELOPMENTS

Street stalls/kiosks continue to operate in a difficult environment

INDUSTRY PERFORMANCE

Limited growth from a small base for street stalls/kiosks in Chile

Custom and growth are concentrated on fixed, permitted locations rather than the street

Municipal regulation shapes a highly fragmented operating environment

WHAT'S NEXT?

Gradual growth projection is set to be supported by formalisation and higher-spend locations
Takeaway to continue to dominate as consumption is set to remain occasiondriven
Selective innovation to focus on offer upgrades rather than reinvention

COMPETITIVE LANDSCAPE

Independents shape the category
Absence of significant chained operators reflects structural constraints

CATEGORY DATA

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[Consumer Foodservice By Location in Chile](#)

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2025 DEVELOPMENTS

Improving drivers for consumer foodservice by location

INDUSTRY PERFORMANCE

Retail emerges as the most dynamic location
Standalone locations see momentum through urban revitalisation
Lodging gains appeal through value for money premiumisation

WHAT'S NEXT?

Travel is set to be the most dynamic location with standalone remaining the key type
Pricing power to shape opportunities across types of locations
Demographic shifts to reinforce the importance of central, accessible locations

COMPETITIVE LANDSCAPE

Competition is characterised by format and experiences
Standalone restaurants reflect both opportunity and structural pressure

CATEGORY DATA

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