



Self-Service Cafeterias in Brazil

March 2026

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Self-Service Cafeterias in Brazil - Category analysis

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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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Consumer Foodservice in Brazil - Industry Overview

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Performance softens as inflation and high interest rates weigh on demand

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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

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