



Street Stalls/Kiosks in Brazil

March 2026

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Street Stalls/Kiosks in Brazil - Category analysis

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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

Independent vendors lead through scale, flexibility and low regulatory oversight

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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

Consolidation and new international entrants are expected to reshape competition

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