



Consumer Foodservice By Location in Chile

March 2026

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KEY DATA FINDINGS

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

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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

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 high-cuisine restaurants

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