



Euromonitor
International

Consumer Foodservice in Chile

March 2026

Table of Contents

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

MARKET DATA

Table 1 - Units, Transactions and Value Sales in Consumer Foodservice 2020-2025

Table 2 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2020-2025

Table 3 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2025

Table 4 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2020-2025

Table 5 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2020-2025

Table 6 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2025

Table 7 - Sales in Consumer Foodservice by Location: % Foodservice Value 2020-2025

Table 8 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2020-2025

Table 9 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2025

Table 10 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2022-2025

Table 11 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2025

Table 12 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2025-2030

Table 13 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2025-2030

DISCLAIMER

SOURCES

Summary 1 - Research Sources

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, experienceled occasions to fuel growth
Experienceled fulfillment to inform onpremise and takeaway sales
Techled formats blending aesthetics and automation in emerging concepts

COMPETITIVE LANDSCAPE

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

CATEGORY DATA

Table 14 - Cafés/Bars by Category: Units/Outlets 2020-2025
Table 15 - Sales in Cafés/Bars by Category: Number of Transactions 2020-2025
Table 16 - Sales in Cafés/Bars by Category: Foodservice Value 2020-2025
Table 17 - Cafés/Bars by Category: % Units/Outlets Growth 2020-2025
Table 18 - Sales in Cafés/Bars by Category: % Transaction Growth 2020-2025
Table 19 - Sales in Cafés/Bars by Category: % Foodservice Value Growth 2020-2025
Table 20 - GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2021-2025
Table 21 - GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2022-2025
Table 22 - Forecast Cafés/Bars by Category: Units/Outlets 2025-2030
Table 23 - Forecast Sales in Cafés/Bars by Category: Number of Transactions 2025-2030
Table 24 - Forecast Sales in Cafés/Bars by Category: Foodservice Value 2025-2030
Table 25 - Forecast Cafés/Bars by Category: % Units/Outlets Growth 2025-2030
Table 26 - Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2025-2030
Table 27 - Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2025-2030

DISCLAIMER

[Full-Service Restaurants in Chile](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Gains from small, dynamic and large, established categories

INDUSTRY PERFORMANCE

Experienceled 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
Eatin is set to retain primacy as delivery expands selectively
Sustainability to become embedded through industryled 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

CATEGORY DATA

Table 28 - Full-Service Restaurants by Category: Units/Outlets 2020-2025

Table 29 - Sales in Full-Service Restaurants by Category: Number of Transactions 2020-2025

Table 30 - Sales in Full-Service Restaurants by Category: Foodservice Value 2020-2025

Table 31 - Full-Service Restaurants by Category: % Units/Outlets Growth 2020-2025

Table 32 - Sales in Full-Service Restaurants by Category: % Transaction Growth 2020-2025

Table 33 - Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2020-2025

Table 34 - GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2021-2025

Table 35 - GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2022-2025

Table 36 - Forecast Full-Service Restaurants by Category: Units/Outlets 2025-2030

Table 37 - Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2025-2030

Table 38 - Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2025-2030

Table 39 - Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2025-2030

Table 40 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2025-2030

Table 41 - Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

DISCLAIMER

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

CATEGORY DATA

Table 42 - Limited-Service Restaurants by Category: Units/Outlets 2020-2025

Table 43 - Sales in Limited-Service Restaurants by Category: Number of Transactions 2020-2025

Table 44 - Sales in Limited-Service Restaurants by Category: Foodservice Value 2020-2025

Table 45 - Limited-Service Restaurants by Category: % Units/Outlets Growth 2020-2025

Table 46 - Sales in Limited-Service Restaurants by Category: % Transaction Growth 2020-2025

Table 47 - Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2020-2025

Table 48 - GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2021-2025

Table 49 - GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2022-2025

Table 50 - Forecast Limited-Service Restaurants by Category: Units/Outlets 2025-2030

Table 51 - Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2025-2030

Table 52 - Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2025-2030

Table 53 - Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2025-2030

Table 54 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2025-2030

Table 55 - Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

DISCLAIMER

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

Table 56 - Self-Service Cafeterias: Units/Outlets 2020-2025

Table 57 - Sales in Self-Service Cafeterias: Number of Transactions 2020-2025

Table 58 - Sales in Self-Service Cafeterias: Foodservice Value 2020-2025

Table 59 - Sales in Self-Service Cafeterias: % Units/Outlets Growth 2020-2025

Table 60 - Sales in Self-Service Cafeterias: % Transaction Growth 2020-2025

Table 61 - Sales in Self-Service Cafeterias: % Foodservice Value Growth 2020-2025

Table 62 - GBO Company Shares in Chained Self-Service Cafeterias: % Foodservice Value 2021-2025

Table 63 - GBN Brand Shares in Chained Self-Service Cafeterias: % Foodservice Value 2022-2025

Table 64 - Forecast Self-Service Cafeterias: Units/Outlets 2025-2030

Table 65 - Forecast Sales in Self-Service Cafeterias: Number of Transactions 2025-2030

Table 66 - Forecast Sales in Self-Service Cafeterias: Foodservice Value 2025-2030

Table 67 - Forecast Self-Service Cafeterias: % Units/Outlets Growth 2025-2030

Table 68 - Forecast Sales in Self-Service Cafeterias: % Transaction Growth 2025-2030

Table 69 - Forecast Sales in Self-Service Cafeterias: % Foodservice Value Growth 2025-2030

DISCLAIMER

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 occasion-driven
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

Table 70 - Street Stalls/Kiosks: Units/Outlets 2020-2025
Table 71 - Sales in Street Stalls/Kiosks: Number of Transactions 2020-2025
Table 72 - Sales in Street Stalls/Kiosks: Foodservice Value 2020-2025
Table 73 - Street Stalls/Kiosks: % Units/Outlets Growth 2020-2025
Table 74 - Sales in Street Stalls/Kiosks: % Transaction Growth 2020-2025
Table 75 - Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2020-2025
Table 76 - GBO Company Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2021-2025
Table 77 - GBN Brand Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2022-2025
Table 78 - Forecast Street Stalls/Kiosks: Units/Outlets 2025-2030
Table 79 - Forecast Sales in Street Stalls/Kiosks: Number of Transactions 2025-2030
Table 80 - Forecast Sales in Street Stalls/Kiosks: Foodservice Value 2025-2030
Table 81 - Forecast Street Stalls/Kiosks: % Units/Outlets Growth 2025-2030
Table 82 - Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2025-2030
Table 83 - Forecast Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2025-2030

DISCLAIMER

[Consumer Foodservice By Location in Chile](#)

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

CATEGORY DATA

Table 84 - Consumer Foodservice by Location: Units/Outlets 2020-2025
Table 85 - Sales in Consumer Foodservice by Location: Number of Transactions 2020-2025
Table 86 - Sales in Consumer Foodservice by Location: Foodservice Value 2020-2025
Table 87 - Consumer Foodservice by Location: % Units/Outlets Growth 2020-2025
Table 88 - Sales in Consumer Foodservice by Location: % Transaction Growth 2020-2025
Table 89 - Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2020-2025

Table 90 - Consumer Foodservice Through Standalone: Units/Outlets 2020-2025

Table 91 - Sales in Consumer Foodservice Through Standalone: Number of Transactions 2020-2025

Table 92 - Sales in Consumer Foodservice Through Standalone: Foodservice Value 2020-2025

Table 93 - Consumer Foodservice Through Standalone: % Units/Outlets Growth 2020-2025

Table 94 - Sales in Consumer Foodservice Through Standalone: % Transaction Growth 2020-2025

Table 95 - Sales in Consumer Foodservice Through Standalone: % Foodservice Value Growth 2020-2025

Table 96 - Consumer Foodservice Through Leisure: Units/Outlets 2020-2025

Table 97 - Sales in Consumer Foodservice Through Leisure: Number of Transactions 2020-2025

Table 98 - Sales in Consumer Foodservice Through Leisure: Foodservice Value 2020-2025

Table 99 - Consumer Foodservice Through Leisure: % Units/Outlets Growth 2020-2025

Table 100 - Sales in Consumer Foodservice Through Leisure: % Transaction Growth 2020-2025

Table 101 - Sales in Consumer Foodservice Through Leisure: % Foodservice Value Growth 2020-2025

Table 102 - Consumer Foodservice Through Retail: Units/Outlets 2020-2025

Table 103 - Sales in Consumer Foodservice Through Retail: Number of Transactions 2020-2025

Table 104 - Sales in Consumer Foodservice Through Retail: Foodservice Value 2020-2025

Table 105 - Consumer Foodservice Through Retail: % Units/Outlets Growth 2020-2025

Table 106 - Sales in Consumer Foodservice Through Retail: % Transaction Growth 2020-2025

Table 107 - Sales in Consumer Foodservice Through Retail: % Foodservice Value Growth 2020-2025

Table 108 - Consumer Foodservice Through Lodging: Units/Outlets 2020-2025

Table 109 - Sales in Consumer Foodservice Through Lodging: Number of Transactions 2020-2025

Table 110 - Sales in Consumer Foodservice Through Lodging: Foodservice Value 2020-2025

Table 111 - Consumer Foodservice Through Lodging: % Units/Outlets Growth 2020-2025

Table 112 - Sales in Consumer Foodservice Through Lodging: % Transaction Growth 2020-2025

Table 113 - Sales in Consumer Foodservice Through Lodging: % Foodservice Value Growth 2020-2025

Table 114 - Consumer Foodservice Through Travel: Units/Outlets 2020-2025

Table 115 - Sales in Consumer Foodservice Through Travel: Number of Transactions 2020-2025

Table 116 - Sales in Consumer Foodservice Through Travel: Foodservice Value 2020-2025

Table 117 - Consumer Foodservice Through Travel: % Units/Outlets Growth 2020-2025

Table 118 - Sales in Consumer Foodservice Through Travel: % Transaction Growth 2020-2025

Table 119 - Sales in Consumer Foodservice Through Travel: % Foodservice Value Growth 2020-2025

Table 120 - Forecast Consumer Foodservice by Location: Units/Outlets 2025-2030

Table 121 - Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2025-2030

Table 122 - Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2025-2030

Table 123 - Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2025-2030

Table 124 - Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2025-2030

Table 125 - Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2025-2030

Table 126 - Forecast Consumer Foodservice Through Standalone: Units/Outlets 2025-2030

Table 127 - Forecast Sales in Consumer Foodservice Through Standalone: Number of Transactions 2025-2030

Table 128 - Forecast Sales in Consumer Foodservice Through Standalone: Foodservice Value 2025-2030

Table 129 - Forecast Consumer Foodservice Through Standalone: % Units/Outlets Growth 2025-2030

Table 130 - Forecast Sales in Consumer Foodservice Through Standalone: % Transaction Growth 2025-2030

Table 131 - Forecast Sales in Consumer Foodservice Through Standalone: % Foodservice Value Growth 2025-2030

Table 132 - Forecast Consumer Foodservice Through Leisure: Units/Outlets 2025-2030

Table 133 - Forecast Sales in Consumer Foodservice Through Leisure: Number of Transactions 2025-2030

Table 134 - Forecast Sales in Consumer Foodservice Through Leisure: Foodservice Value 2025-2030

Table 135 - Forecast Consumer Foodservice Through Leisure: % Units/Outlets Growth 2025-2030

Table 136 - Forecast Sales in Consumer Foodservice Through Leisure: % Transaction Growth 2025-2030

Table 137 - Forecast Sales in Consumer Foodservice Through Leisure: % Foodservice Value Growth 2025-2030

Table 138 - Forecast Consumer Foodservice Through Retail: Units/Outlets 2025-2030

Table 139 - Forecast Sales in Consumer Foodservice Through Retail: Number of Transactions 2025-2030

Table 140 - Forecast Sales in Consumer Foodservice Through Retail: Foodservice Value 2025-2030

Table 141 - Forecast Consumer Foodservice Through Retail: % Units/Outlets Growth 2025-2030

Table 142 - Forecast Sales in Consumer Foodservice Through Retail: % Transaction Growth 2025-2030

Table 143 - Forecast Sales in Consumer Foodservice Through Retail: % Foodservice Value Growth 2025-2030

Table 144 - Forecast Consumer Foodservice Through Lodging: Units/Outlets 2025-2030

Table 145 - Forecast Sales in Consumer Foodservice Through Lodging: Number of Transactions 2025-2030

Table 146 - Forecast Sales in Consumer Foodservice Through Lodging: Foodservice Value 2025-2030

Table 147 - Forecast Consumer Foodservice Through Lodging: % Units/Outlets Growth 2025-2030

Table 148 - Forecast Sales in Consumer Foodservice Through Lodging: % Transaction Growth 2025-2030

Table 149 - Forecast Sales in Consumer Foodservice Through Lodging: % Foodservice Value Growth 2025-2030

Table 150 - Forecast Consumer Foodservice Through Travel: Units/Outlets 2025-2030

Table 151 - Forecast Sales in Consumer Foodservice Through Travel: Number of Transactions 2025-2030

Table 152 - Forecast Sales in Consumer Foodservice Through Travel: Foodservice Value 2025-2030

Table 153 - Forecast Consumer Foodservice Through Travel: % Units/Outlets Growth 2025-2030

Table 154 - Forecast Sales in Consumer Foodservice Through Travel: % Transaction Growth 2025-2030

Table 155 - Forecast Sales in Consumer Foodservice Through Travel: % Foodservice Value Growth 2025-2030

DISCLAIMER

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/consumer-foodservice-in-chile/report.