



Consumer Foodservice By Location in Brazil

March 2026

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Retail locations gain momentum, while standalone remains the core route to market

INDUSTRY PERFORMANCE

Shopping centres support higher throughput for chains

Standalone retains leadership as independents dominate and costs stay lower

Independents anchor eat-in, while delivery expands as a lower-cost growth lever

WHAT'S NEXT?

Retail location growth set to accelerate as new malls open

Standalone to stay ahead, but constant value sales will soften

Delivery competition and format innovation will widen growth options

COMPETITIVE LANDSCAPE

McDonald's leads in non-standalone thanks to scale and mall fit

McDonald's also tops standalone locations through network coverage and site discipline

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DISCLAIMER

Consumer Foodservice in Brazil - Industry Overview

EXECUTIVE SUMMARY

Performance softens as inflation and high interest rates weigh on demand

KEY DATA FINDINGS

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

CHANNELS

Independent outlets remain the main route to market, but financial fragility is a constraint

Chains gain share as delivery and retail locations remain dynamic

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