



Euromonitor
International

Limited-Service Restaurants in Brazil

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Limited-Service Restaurants in Brazil - Category analysis

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2025 DEVELOPMENTS

Value-led promotions and channel shifts shape a challenging 2025

INDUSTRY PERFORMANCE

Promotions intensify as traffic falls and consumers reallocate discretionary spend

Ice cream chains grow as product innovation reduces seasonality and fuels franchising

Delivery overtakes eat-in as Chinese entrants raise competitive pressure

WHAT'S NEXT?

Tax reforms and 2026 events to lift demand despite modest economic growth

Intensifying platform competition should reshape fees and channel mix

Sustainability requirements set to accelerate adoption among larger chains

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Consumer Foodservice in Brazil - Industry Overview

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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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