



Euromonitor  
International

# Cafés/Bars in Brazil

March 2026

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#### 2025 DEVELOPMENTS

Trading stays subdued as inflation squeezes micro-entrepreneurs

#### INDUSTRY PERFORMANCE

Pressure on household budgets and a spirits safety shock weigh on 2025

Health positioning supports juice, smoothie and coffee-led growth pockets

Eat-in leads as rapid delivery and takeaway expand beverage access

#### WHAT'S NEXT?

Demand should hold steady, with event-driven peaks and health-led growth pockets

Eat-in to remain central, while beverage delivery and platform rivalry intensify

Consolidation and professional management likely to expand in a fragmented category

#### COMPETITIVE LANDSCAPE

McCafé leads by leveraging McDonald's footprint and a stronger breakfast offer

Domestic chains gain momentum through franchising and brand-led experiences

Independents remain dominant, while chains grow faster from small base

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## 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

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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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