Full-Service Restaurants in Brazil

March 2026

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Full-Service Restaurants in Brazil - Category analysis

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2025 DEVELOPMENTS

Premium players outperform as independents absorb cost pressure

INDUSTRY PERFORMANCE

Inflation and shifting consumer priorities limit value growth in 2025

North American casual dining drives the strongest growth within full-service restaurants

Eat-in leads, while delivery remains small due to ticket size and fee economics

WHAT'S NEXT?

Macroeconomic conditions and lifestyle shifts weigh on constant value sales

Experience-led propositions should keep eat-in ahead, while delivery faces regulatory and fee uncertainty

Consolidation set to accelerate as groups seek scale in a fragmented landscape

COMPETITIVE LANDSCAPE

Outback Steakhouse leads and accelerates expansion under new ownership structure

Coco Bambu outperforms through expansion in shopping centres and experience-led positioning

Independents remain dominant, while cuisine mix keeps other and pizza as the main pillars

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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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