

Consumer Foodservice in Brazil

February 2024

Table of Contents

EXECUTIVE SUMMARY

Consumer foodservice in 2023: The big picture

2023 key trends

Competitive landscape

Independent foodservice developments

What next for consumer foodservice?

MARKET DATA

Table 1 - Units, Transactions and Value Sales in Consumer Foodservice 2018-2023

Table 2 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2018-2023

Table 3 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2023

Table 4 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2018-2023

Table 5 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2018-2023

Table 6 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2023

Table 7 - Sales in Consumer Foodservice by Location: % Foodservice Value 2018-2023

Table 8 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2019-2023

Table 9 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2020-2023

Table 10 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2023

Table 11 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2023-2028

Table 12 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Cafés/Bars in Brazil

KEY DATA FINDINGS

2023 DEVELOPMENTS

Approaching pre-pandemic levels but still grappling with challenging macroeconomic factors

The third wave of coffee in Brazil

The “Bar & Lanches” model and consumption changes

PROSPECTS AND OPPORTUNITIES

Specialist coffee and tea shops expected to continue growing and investing in service and menu improvement

Juice/smoothie bars can benefit from health and wellness trend

Moderate growth expected due to channel's indebtedness and high interest rates

CATEGORY DATA

Table 13 - Cafés/Bars by Category: Units/Outlets 2018-2023

Table 14 - Sales in Cafés/Bars by Category: Number of Transactions 2018-2023

Table 15 - Sales in Cafés/Bars by Category: Foodservice Value 2018-2023

Table 16 - Cafés/Bars by Category: % Units/Outlets Growth 2018-2023

Table 17 - Sales in Cafés/Bars by Category: % Transaction Growth 2018-2023

Table 18 - Sales in Cafés/Bars by Category: % Foodservice Value Growth 2018-2023

Table 19 - GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2019-2023

Table 20 - GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2020-2023

Table 21 - Forecast Cafés/Bars by Category: Units/Outlets 2023-2028

Table 22 - Forecast Sales in Cafés/Bars by Category: Number of Transactions 2023-2028

Table 23 - Forecast Sales in Cafés/Bars by Category: Foodservice Value 2023-2028

Table 24 - Forecast Cafés/Bars by Category: % Units/Outlets Growth 2023-2028

Table 25 - Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2023-2028

Table 26 - Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2023-2028

Full-Service Restaurants in Brazil

KEY DATA FINDINGS

2023 DEVELOPMENTS

High levels of indebtedness - a consequence of the pandemic

Maintaining customer service is one of the main challenges

Third party delivery apps grow as they aim to expand into smaller regions and offer more affordable prices

PROSPECTS AND OPPORTUNITIES

Entry of major manufacturers to foodservice as a strategy to get closer to end consumers

Comfort food through heritage, indulgence and a return to familiar flavours

Popularisation of brunch among consumers with higher purchasing power

CATEGORY DATA

Table 27 - Full-Service Restaurants by Category: Units/Outlets 2018-2023

Table 28 - Sales in Full-Service Restaurants by Category: Number of Transactions 2018-2023

Table 29 - Sales in Full-Service Restaurants by Category: Foodservice Value 2018-2023

Table 30 - Full-Service Restaurants by Category: % Units/Outlets Growth 2018-2023

Table 31 - Sales in Full-Service Restaurants by Category: % Transaction Growth 2018-2023

Table 32 - Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2018-2023

Table 33 - GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2019-2023

Table 34 - GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2020-2023

Table 35 - Forecast Full-Service Restaurants by Category: Units/Outlets 2023-2028

Table 36 - Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2023-2028

Table 37 - Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2023-2028

Table 38 - Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2023-2028

Table 39 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2023-2028

Table 40 - Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2023-2028

Limited-Service Restaurants in Brazil

KEY DATA FINDINGS

2023 DEVELOPMENTS

Higher levels of footfall and socialising, but macroeconomic scenario remains challenging

The power of delivery app iFood

The rise of chained convenience store OXXO in the limited-service space

PROSPECTS AND OPPORTUNITIES

Customer loyalty through technology

Operational efficiency as a focal point

“Eatertainment” and collaborations are expected to continue growing

CATEGORY DATA

Table 41 - Limited-Service Restaurants by Category: Units/Outlets 2018-2023

Table 42 - Sales in Limited-Service Restaurants by Category: Number of Transactions 2018-2023

Table 43 - Sales in Limited-Service Restaurants by Category: Foodservice Value 2018-2023

Table 44 - Limited-Service Restaurants by Category: % Units/Outlets Growth 2018-2023

Table 45 - Sales in Limited-Service Restaurants by Category: % Transaction Growth 2018-2023

Table 46 - Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2018-2023

Table 47 - GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2019-2023

Table 48 - GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2020-2023

Table 49 - Forecast Limited-Service Restaurants by Category: Units/Outlets 2023-2028

Table 50 - Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2023-2028

Table 51 - Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2023-2028

Table 52 - Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2023-2028

Table 53 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2023-2028

Table 54 - Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2023-2028

Self-Service Cafeterias in Brazil

KEY DATA FINDINGS

2023 DEVELOPMENTS

Still far from recovering to pre-pandemic levels but with greater optimism for 2024

Dark kitchens increase participation in delivery via lunchboxes

Pix expands its participation as a payment method

PROSPECTS AND OPPORTUNITIES

Ready meals compete for the same consumption occasion

Exploring themed/international cuisine buffets and new consumption occasions to innovate

Discussion around AI gains greater momentum

CATEGORY DATA

Table 55 - Self-Service Cafeterias: Units/Outlets 2018-2023

Table 56 - Sales in Self-Service Cafeterias: Number of Transactions 2018-2023

Table 57 - Sales in Self-Service Cafeterias: Foodservice Value 2018-2023

Table 58 - Sales in Self-Service Cafeterias: % Units/Outlets Growth 2018-2023

Table 59 - Sales in Self-Service Cafeterias: % Transaction Growth 2018-2023

Table 60 - Sales in Self-Service Cafeterias: % Foodservice Value Growth 2018-2023

Table 61 - GBO Company Shares in Chained Self-Service Cafeterias: % Foodservice Value 2019-2023

Table 62 - GBN Brand Shares in Chained Self-Service Cafeterias: % Foodservice Value 2020-2023

Table 63 - Forecast Self-Service Cafeterias: Units/Outlets 2023-2028

Table 64 - Forecast Sales in Self-Service Cafeterias: Number of Transactions 2023-2028

Table 65 - Forecast Sales in Self-Service Cafeterias: Foodservice Value 2023-2028

Table 66 - Forecast Self-Service Cafeterias: % Units/Outlets Growth 2023-2028

Table 67 - Forecast Sales in Self-Service Cafeterias: % Transaction Growth 2023-2028

Table 68 - Forecast Sales in Self-Service Cafeterias: % Foodservice Value Growth 2023-2028

Street Stalls/Kiosks in Brazil

KEY DATA FINDINGS

2023 DEVELOPMENTS

Street stalls/kiosks is a highly regenerative channel

McDonald's dessert kiosks lead channel, while The Nutty Bavarian focuses on diversification

Nathan's Famous, chained North American hot dog brand, aims to expand in 2024

PROSPECTS AND OPPORTUNITIES

Foodservice operators to become increasingly demanding of their suppliers

The smaller outlet format is expected to continue gaining popularity

New launches to focus on nostalgia and indulgence

CATEGORY DATA

Table 69 - Street Stalls/Kiosks: Units/Outlets 2018-2023

Table 70 - Sales in Street Stalls/Kiosks: Number of Transactions 2018-2023

Table 71 - Sales in Street Stalls/Kiosks: Foodservice Value 2018-2023

Table 72 - Street Stalls/Kiosks: % Units/Outlets Growth 2018-2023

Table 73 - Sales in Street Stalls/Kiosks: % Transaction Growth 2018-2023

Table 74 - Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2018-2023

Table 75 - GBO Company Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2019-2023

Table 76 - GBN Brand Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2020-2023

Table 77 - Forecast Street Stalls/Kiosks: Units/Outlets 2023-2028

Table 78 - Forecast Sales in Street Stalls/Kiosks: Number of Transactions 2023-2028

Table 79 - Forecast Sales in Street Stalls/Kiosks: Foodservice Value 2023-2028

Table 80 - Forecast Street Stalls/Kiosks: % Units/Outlets Growth 2023-2028

Table 81 - Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2023-2028

Table 82 - Forecast Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2023-2028

Consumer Foodservice By Location in Brazil

KEY DATA FINDINGS

2023 DEVELOPMENTS

Standalone remains leading location but alternative spaces are growing in preference

Presence of major brands at The Town music festival focus on engagement with younger consumers

Privatisation of airports and resumption of travel activities boost foodservice

PROSPECTS AND OPPORTUNITIES

Standalone outlets expected to continue losing ground to other locations

Rise of heritage cuisine and its promotion through tourism

CATEGORY DATA

Table 83 - Consumer Foodservice by Location: Units/Outlets 2018-2023

Table 84 - Sales in Consumer Foodservice by Location: Number of Transactions 2018-2023

Table 85 - Sales in Consumer Foodservice by Location: Foodservice Value 2018-2023

Table 86 - Consumer Foodservice by Location: % Units/Outlets Growth 2018-2023

Table 87 - Sales in Consumer Foodservice by Location: % Transaction Growth 2018-2023

Table 88 - Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2018-2023

Table 89 - Consumer Foodservice through Standalone: Units/Outlets 2018-2023

Table 90 - Sales in Consumer Foodservice through Standalone: Number of Transactions 2018-2023

Table 91 - Sales in Consumer Foodservice through Standalone: Foodservice Value 2018-2023

Table 92 - Consumer Foodservice through Standalone: % Units/Outlets Growth 2018-2023

Table 93 - Sales in Consumer Foodservice through Standalone: % Transaction Growth 2018-2023

Table 94 - Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2018-2023

Table 95 - Consumer Foodservice through Leisure: Units/Outlets 2018-2023

Table 96 - Sales in Consumer Foodservice through Leisure: Number of Transactions 2018-2023

Table 97 - Sales in Consumer Foodservice through Leisure: Foodservice Value 2018-2023

Table 98 - Consumer Foodservice through Leisure: % Units/Outlets Growth 2018-2023

Table 99 - Sales in Consumer Foodservice through Leisure: % Transaction Growth 2018-2023

Table 100 - Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2018-2023

Table 101 - Consumer Foodservice through Retail: Units/Outlets 2018-2023

Table 102 - Sales in Consumer Foodservice through Retail: Number of Transactions 2018-2023

Table 103 - Sales in Consumer Foodservice through Retail: Foodservice Value 2018-2023

Table 104 - Consumer Foodservice through Retail: % Units/Outlets Growth 2018-2023

Table 105 - Sales in Consumer Foodservice through Retail: % Transaction Growth 2018-2023

Table 106 - Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2018-2023

Table 107 - Consumer Foodservice through Lodging: Units/Outlets 2018-2023

Table 108 - Sales in Consumer Foodservice through Lodging: Number of Transactions 2018-2023

Table 109 - Sales in Consumer Foodservice through Lodging: Foodservice Value 2018-2023

Table 110 - Consumer Foodservice through Lodging: % Units/Outlets Growth 2018-2023

Table 111 - Sales in Consumer Foodservice through Lodging: % Transaction Growth 2018-2023

Table 112 - Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2018-2023

Table 113 - Consumer Foodservice through Travel: Units/Outlets 2018-2023

Table 114 - Sales in Consumer Foodservice through Travel: Number of Transactions 2018-2023

Table 115 - Sales in Consumer Foodservice through Travel: Foodservice Value 2018-2023

Table 116 - Consumer Foodservice through Travel: % Units/Outlets Growth 2018-2023

Table 117 - Sales in Consumer Foodservice through Travel: % Transaction Growth 2018-2023

Table 118 - Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2018-2023

Table 119 - Forecast Consumer Foodservice by Location: Units/Outlets 2023-2028

Table 120 - Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2023-2028

Table 121 - Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2023-2028

Table 122 - Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2023-2028

Table 123 - Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2023-2028

Table 124 - Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2023-2028

Table 125 - Forecast Consumer Foodservice through Standalone: Units/Outlets 2023-2028

Table 126 - Forecast Sales in Consumer Foodservice through Standalone: Number of Transactions 2023-2028

Table 127 - Forecast Sales in Consumer Foodservice through Standalone: Foodservice Value 2023-2028

Table 128 - Forecast Consumer Foodservice through Standalone: % Units/Outlets Growth 2023-2028

Table 129 - Forecast Sales in Consumer Foodservice through Standalone: % Transaction Growth 2023-2028

Table 130 - Forecast Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2023-2028

Table 131 - Forecast Consumer Foodservice through Leisure: Units/Outlets 2023-2028

Table 132 - Forecast Sales in Consumer Foodservice through Leisure: Number of Transactions 2023-2028

Table 133 - Forecast Sales in Consumer Foodservice through Leisure: Foodservice Value 2023-2028

Table 134 - Forecast Consumer Foodservice through Leisure: % Units/Outlets Growth 2023-2028

Table 135 - Forecast Sales in Consumer Foodservice through Leisure: % Transaction Growth 2023-2028

Table 136 - Forecast Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2023-2028

Table 137 - Forecast Consumer Foodservice through Retail: Units/Outlets 2023-2028

Table 138 - Forecast Sales in Consumer Foodservice through Retail: Number of Transactions 2023-2028

Table 139 - Forecast Sales in Consumer Foodservice through Retail: Foodservice Value 2023-2028

Table 140 - Forecast Consumer Foodservice through Retail: % Units/Outlets Growth 2023-2028

Table 141 - Forecast Sales in Consumer Foodservice through Retail: % Transaction Growth 2023-2028

Table 142 - Forecast Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2023-2028

Table 143 - Forecast Consumer Foodservice through Lodging: Units/Outlets 2023-2028

Table 144 - Forecast Sales in Consumer Foodservice through Lodging: Number of Transactions 2023-2028

Table 145 - Forecast Sales in Consumer Foodservice through Lodging: Foodservice Value 2023-2028

Table 146 - Forecast Consumer Foodservice through Lodging: % Units/Outlets Growth 2023-2028

Table 147 - Forecast Sales in Consumer Foodservice through Lodging: % Transaction Growth 2023-2028

Table 148 - Forecast Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2023-2028

Table 149 - Forecast Consumer Foodservice through Travel: Units/Outlets 2023-2028

Table 150 - Forecast Sales in Consumer Foodservice through Travel: Number of Transactions 2023-2028

Table 151 - Forecast Sales in Consumer Foodservice through Travel: Foodservice Value 2023-2028

Table 152 - Forecast Consumer Foodservice through Travel: % Units/Outlets Growth 2023-2028

Table 153 - Forecast Sales in Consumer Foodservice through Travel: % Transaction Growth 2023-2028

Table 154 - Forecast Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2023-2028

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-brazil/report.