



**Euromonitor
International**

Consumer Foodservice in Chile

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EXECUTIVE SUMMARY

Players adapt to the environment with a shift towards efficiency and value-driven strategies

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Priced value gains in a highly competitive cost environment

Channel strategies adapt amid rising costs and normalisation of consumption

Loyalty shifts towards delivery ecosystems as restaurants lean on experience

WHAT'S NEXT?

Rising sales to be supported by value-offering formats and consumer confidence gains

Growth of Asian-themed formats shapes innovation in 2025

Sustainability advances slowly, driven mainly by regulation and consumer action

COMPETITIVE LANDSCAPE

Brand leadership is reinforced through value, convenience and channel reach

Little Caesar's Pizza shows dynamism through its signature Hot-N-Ready model

New entrants disrupt the competitive landscape

CHANNELS

Independents gain visibility through fast expansion and renewed demand

Innovation in independent highcuisine restaurants

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INDUSTRY PERFORMANCE

Independents drive strong growth across cafés/bars

Independent specialist coffee and tea shops intensify the competition
Affordable luxury as a consumer tradeoff

WHAT'S NEXT?

Rising demand for social, experienceled occasions to fuel growth
Experienceled fulfillment to inform onpremise and takeaway sales
Techled formats blending aesthetics and automation in emerging concepts

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2025 DEVELOPMENTS

Gains from small, dynamic and large, established categories

INDUSTRY PERFORMANCE

Experienceled dining and urban revival lift foodservice value sales
Middle Eastern concepts add dynamism as artisanal pizza gains scale
Eat-in dominates fulfillment while delivery retains an important complementary role

WHAT'S NEXT?

Social, accessible formats to sustain momentum in key full-service categories
Eatin is set to retain primacy as delivery expands selectively
Sustainability to become embedded through industryled standards

COMPETITIVE LANDSCAPE

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Limited-Service Restaurants in Chile

KEY DATA FINDINGS

2025 DEVELOPMENTS

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INDUSTRY PERFORMANCE

Upward trajectory in foodservice current value sales amid sharp variation across categories

Chicken format strengthens position through expansion and versatility

Delivery partnerships and mall footfall drive fulfillment efficiency

WHAT'S NEXT?

Positive outlook underpinned by scale, expansion and strong value appeal

Stronger mall traffic and delivery integration to shape fulfillment evolution

Copec to intensify competition through foodservice integration

COMPETITIVE LANDSCAPE

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Concentration as independents continue to struggle

INDUSTRY PERFORMANCE

Category momentum driven by a single scaled operator

Mobility and occasion shifts reshape foot traffic for selfservice cafeterias

Convenience and promotions shift spending away from selfservice formats

WHAT'S NEXT?

Moderate uplift expected as officelinked demand gradually returns

Casual eatin remains core as the format balances speed and experience

Incremental innovation and sustainability focus on operations not reinvention

COMPETITIVE LANDSCAPE

Rincón Jumbo leads selfservice cafeterias through structural advantage

Consumer loyalty and occasion expansion drive Rincón Jumbo's dynamism

Structural concentration defines selfservice cafeterias

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Street Stalls/Kiosks in Chile

KEY DATA FINDINGS

2025 DEVELOPMENTS

Street stalls/kiosks continue to operate in a difficult environment

INDUSTRY PERFORMANCE

Limited growth from a small base for street stalls/kiosks in Chile

Custom and growth are concentrated on fixed, permitted locations rather than the street

Municipal regulation shapes a highly fragmented operating environment

WHAT'S NEXT?

Gradual growth projection is set to be supported by formalisation and higher-spend locations
Takeaway to continue to dominate as consumption is set to remain occasion-driven
Selective innovation to focus on offer upgrades rather than reinvention

COMPETITIVE LANDSCAPE

Independents shape the category
Absence of significant chained operators reflects structural constraints

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[Consumer Foodservice By Location in Chile](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Improving drivers for consumer foodservice by location

INDUSTRY PERFORMANCE

Retail emerges as the most dynamic location
Standalone locations see momentum through urban revitalisation
Lodging gains appeal through value for money premiumisation

WHAT'S NEXT?

Travel is set to be the most dynamic location with standalone remaining the key type
Pricing power to shape opportunities across types of locations
Demographic shifts to reinforce the importance of central, accessible locations

COMPETITIVE LANDSCAPE

Competition is characterised by format and experiences
Standalone restaurants reflect both opportunity and structural pressure

CATEGORY DATA

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