

Brazil Foodservice - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

Market Report | 2024-02-17 | 190 pages | Mordor Intelligence

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Report description:

The Brazil Foodservice Market size is estimated at USD 17.35 billion in 2024, and is expected to reach USD 24.03 billion by 2029, growing at a CAGR of 6.73% during the forecast period (2024-2029).

Popular delivery apps innovating delivery experience are driving the popularity of cloud kitchens.

- Quick-service restaurants accounted for a major market share, witnessing a growth of 27.41% since the pandemic from 2020 to 2022. Around 48% of the population consumes fast food at least once per week. Big chains like McDonald's operate 2,585 outlets, Subway has 1,862 outlets, and Burger King has 1,242 outlets, among others.

- Cloud kitchens are projected to be the fastest-growing foodservice type, with a projected CAGR value of 16.46% during the forecast period. The trend of ghost kitchens is gaining popularity in Brazil, as there were around 11.85 million platform-to-consumer delivery users and more than 48.75 million restaurant-to-consumer delivery users in 2021. Popular delivery apps like Uber Eats, Hello Food, iFood, and Zomato, are continuously innovating their delivery experience and app experience with discount offers for new users. The US startup CloudKitchens has expanded in the market by buying and installing 'dark kitchens' in Latin America over the past three years. Microsoft Corp. announced an investment of over USD 850 million in the same startup. Foodology, a Colombia-based cloud kitchen and virtual restaurant company, is also expanding in the country.

- Cafes and bars accounted for the second largest share in the market, with a projected CAGR value of 7.75% during the forecast period owing to the high consumption of both alcoholic and non-alcoholic drinks in the country. For instance, the annual per capita consumption of alcoholic beverages in Brazil was around USD 52.5 liters in 2021. Also, the per capita consumption of coffee in the country amounted to 5.65 kg in 2022.

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Brazil Foodservice Market Trends

Popular fast food chains in Brazil expanding their footprint to meet rising demand, led by brands like McDonald's, Subway, Burger King, Bob's, Chiquinho, and Oggi Sovertes

- The total number of foodservice outlets witnessed a hike of 12.69% from 2020 to 2022. The number of orders per year reached over 20,500 in 2022, witnessing a hike of more than 3,000 orders per year compared to 2017. Popular chains like McDonald's were operating with 2,585 outlets, Subway with 1,862 outlets, Burger King with 1,242 outlets, Bob's with 977 outlets, Chiquinho Sovertes with 566 outlets, and Oggi Sovertes with 544 outlets as of 2021. With expansion as their key strategy, they are expanding their footprint due to an increased number of orders per outlet. Cafe chains like Starbucks had 113 stores across 17 cities in 2021. These cafe chains register high demand for coffee due to their unique menu offerings and premium coffee products.

- Cloud kitchens are projected to be the fastest-growing outlet type, with a CAGR value of 3.57% during the forecast period. Owing to the large number of online delivery app users and the lower setup costs, which reduce the operational costs, labor costs, electricity, and dine-in facility costs, this number of cloud kitchens is projected to increase. For instance, in Brazil, there were around 11.85 million platform-to-consumer delivery users and more than 48.75 million restaurant-to-consumer delivery users as of 2021.

- Quick-service restaurant outlets accounted for the largest share of more than 48.07% in 2022. The consumption of fast food is high in the country; mainly fried chicken products, pizza, burgers, pasta, cakes, and ice creams are popular. The consumption among people aged between 15 and 64 years is high, accounting for around 70% of the population in 2022, thus driving sales and increasing the number of orders per year, which reached over 5,140 per outlet in 2022.

Asian cuisine drives demand for full service restaurants in Brazil, popular dishes include abacha/ugba, iyan, and Ewa again

- The average order value was observed to be the highest among full service restaurants in 2022 compared to other foodservice types, amounting to USD 8.84. The demand for FSR in the country is driven by Asian cuisine, which also presents an opportunity for FSR operators to expand their menus and offer a wider range of Asian dishes to cater to the growing demand, as it accounted for a significant contribution to the industry. Izakaya Matsuri, Hakone, Hunan, and Pad Thai Express are some of the country's popular Asian restaurants. Popular dishes offered by FSRs in the country are Abacha/Ugba, Iyan, and Ewa Agoyin, priced at USD 2.58, USD 3.45, and USD 4.15 per 300 grams, respectively, in 2022.

- Cloud kitchens are expected to grow at a faster rate in the country. The average order value of cloud kitchens was USD 7.23 in 2022. Popular dishes in cloud kitchens are burgers, fried chicken products, and Brigaderios, priced at USD 3.25, USD 5.8, and USD 2.85 per 300 grams, respectively, in 2022. This popularity of diverse food options presents an opportunity for cloud kitchen operators to offer a wider range of cuisines and cater to the diverse taste preferences of Brazilian consumers.

- The average order value of quick service restaurants increased by 4.10% from 2017 to 2022. The entry of various chained outlets in the QSR segment has significantly widened the chained quick service fast food outlet market due to increased consumer spending on fast food. To sustain this growth, operators need to continually innovate their menus, offer healthier options, and enhance the overall customer experience. Popular dishes offered by QSRs in the country include burgers, Pastels, and Brigadeiros,

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priced at USD 3.25, USD 2.85, and USD 2.75 per 300 grams, respectively, in 2022.

Brazil Foodservice Industry Overview

The Brazil Foodservice Market is fragmented, with the top five companies occupying 23.93%. The major players in this market are Arcos Dorados Holdings Inc., Brazil Fast Food Corporation, Grupo Madero, International Meal Company Alimentacao SA and Restaurant Brands International Inc. (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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