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Executive Summary

Brazilian consumer foodservice performs well with strong investments

In 2010 the consumer foodservice industry saw current value growth of 10%, in line with the review period CAGR. Furthermore, channel establishments registered the most dynamic performance, both in terms of the number of outlets, transactions and current foodservice sales compared with independent outlets. The main reasons behind such a performance are continued franchising agreements and the boom in shopping mall construction, generating high demand for chained outlets.

Global Burger King acquired by private-equity group 3G Capital Management

In September 2010 Burger King was acquired by the Brazilian private-equity group 3G Capital Management, which is also owner of InBev NV SA and Amstel, in a deal valued at US$ 1 billion. This acquisition has positively affected the chained burger fast food category in Brazil. It is expected that this acquisition will also improve future sales of beverages in special soft drinks under the PepsiCo and Antarctica brands in Burger King’s establishments in coming years (2010-2015).

Top four brands hold over 50% of total chained consumer foodservice sales

McDonald’s Corp, Al Savina Empreendimentos Imobiliarios e Participacoes Ltda, Brazil Fast Food Corp and Restaur Alimentos Ltda, under McDonald’s, Hamb’s, Bob’s and Griff’s brands – leading players in the chained fast food – accounted for 50% of total sales in current value terms within chained consumer foodservice in 2010. Accessible prices, combo sandwiches and aggressive marketing campaigns are the main strategies adopted by these companies to hold leadership positions, as a very competitive environment develops in Brazil.

Chained versus independent trends in consumer foodservice in Brazil

Despite the high number of independent operators which are concentrated mainly in categories as cafés/bars, full-service restaurants and fast food, chained consumer foodservice demonstrated signs of consolidation over 2005-2010. The chained consumer foodservice component of the total market grew substantially over 2005-2010, and is expected to continue to gain share over the forecast period.

Positive performance expected in coming years

Strong macroeconomic trends and investments from both domestic and international operators are expected to support the performance of the Brazilian consumer foodservice market over the forecast period. Investments from private-equity groups, alliances and new acquisitions/mergers among larger