Cheffelo (Q3 Review) - Dish of the quarter, returned untouched

Redeye updates its estimates and valuation following Cheffelo's Q3 2025 report. The results were largely known in advance, with sales and EBIT preannounced. Nevertheless, financial performance in the quarter was outstanding, with close to 30% organic growth and clear profitability improvements. Still, after a strong period for the share, the market appears to have reacted negatively to the Q4 outlook, with the share falling c11% on the day of the report. We consider this an overreaction and increase our Base Case valuation slightly.

Read more and download the Research Update.

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Attachments

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