

Fresh Food in Brazil

December 2024

Table of Contents

Fresh Food in Brazil

EXECUTIVE SUMMARY

Fresh food in 2024: The big picture

2024 key trends

Retailing developments

What next for fresh food?

MARKET DATA

- Table 1 Total Sales of Fresh Food by Category: Total Volume 2019-2024
- Table 2 Total Sales of Fresh Food by Category: % Total Volume Growth 2019-2024
- Table 3 Retail Sales of Fresh Food by Category: Volume 2019-2024
- Table 4 Retail Sales of Fresh Food by Category: % Volume Growth 2019-2024
- Table 5 Retail Sales of Fresh Food by Category: Value 2019-2024
- Table 6 Retail Sales of Fresh Food by Category: % Value Growth 2019-2024
- Table 7 Retail Sales of Fresh Food by Packaged vs Unpackaged: % Volume 2019-2024
- Table 8 Retail Distribution of Fresh Food by Format: % Volume 2019-2024
- Table 9 Forecast Total Sales of Fresh Food by Category: Total Volume 2024-2029
- Table 10 Forecast Total Sales of Fresh Food by Category: % Total Volume Growth 2024-2029
- Table 11 Forecast Retail Sales of Fresh Food by Category: Volume 2024-2029
- Table 12 Forecast Retail Sales of Fresh Food by Category: % Volume Growth 2024-2029
- Table 13 Forecast Retail Sales of Fresh Food by Category: Value 2024-2029
- Table 14 Forecast Retail Sales of Fresh Food by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Eggs in Brazil

KEY DATA FINDINGS

2024 DEVELOPMENTS

Inflation promotes the consumption of eggs as an alternative to meat

Eggs takes advantage of recent positive associations with health

PROSPECTS AND OPPORTUNITIES

Organic and free-range eggs are valued by consumers

Foodservice also set to take advantage of the popularity of eggs

Summary 2 - Major Processors of Eggs 2024

CATEGORY DATA

- Table 15 Total Sales of Eggs: Total Volume 2019-2024
- Table 16 Total Sales of Eggs: % Total Volume Growth 2019-2024
- Table 17 Retail Sales of Eggs: Volume 2019-2024
- Table 18 Retail Sales of Eggs: % Volume Growth 2019-2024
- Table 19 Retail Sales of Eggs: Value 2019-2024
- Table 20 Retail Sales of Eggs: % Value Growth 2019-2024
- Table 21 Retail Sales of Eggs by Packaged vs Unpackaged: % Volume 2019-2024
- Table 22 Forecast Total Sales of Eggs: Total Volume 2024-2029
- Table 23 Forecast Total Sales of Eggs: % Total Volume Growth 2024-2029
- Table 24 Forecast Retail Sales of Eggs: Volume 2024-2029
- Table 25 Forecast Retail Sales of Eggs: % Volume Growth 2024-2029

Table 26 - Forecast Retail Sales of Eggs: Value 2024-2029

Table 27 - Forecast Retail Sales of Eggs: % Value Growth 2024-2029

Fish and Seafood in Brazil

KEY DATA FINDINGS

2024 DEVELOPMENTS

Fish production increases yearly, but domestic consumption remains low

Foodservice as a gateway to increase fish and seafood consumption

PROSPECTS AND OPPORTUNITIES

Federal and state incentives to support growth for fish and seafood, and foodservice will promote these products

Traditional retail relies on strong companies to promote fish and seafood, while independent e-commerce fish suppliers thrive on social media

Summary 3 - Major Processors of Fish and Seafood 2024

CATEGORY DATA

Table 28 - Total Sales of Fish and Seafood by Category: Total Volume 2019-2024

Table 29 - Total Sales of Fish and Seafood by Category: % Total Volume Growth 2019-2024

Table 30 - Retail Sales of Fish and Seafood by Category: Volume 2019-2024

Table 31 - Retail Sales of Fish and Seafood by Category: % Volume Growth 2019-2024

Table 32 - Retail Sales of Fish and Seafood by Category: Value 2019-2024

Table 33 - Retail Sales of Fish and Seafood by Category: % Value Growth 2019-2024

Table 34 - Retail Sales of Fish and Seafood by Packaged vs Unpackaged: % Volume 2019-2024

Table 35 - Forecast Total Sales of Fish and Seafood by Category: Total Volume 2024-2029

Table 36 - Forecast Total Sales of Fish and Seafood by Category: % Total Volume Growth 2024-2029

Table 37 - Forecast Retail Sales of Fish and Seafood by Category: Volume 2024-2029

Table 38 - Forecast Retail Sales of Fish and Seafood by Category: % Volume Growth 2024-2029

Table 39 - Forecast Retail Sales of Fish and Seafood by Category: Value 2024-2029

Table 40 - Forecast Retail Sales of Fish and Seafood by Category: % Value Growth 2024-2029

Fruits in Brazil

KEY DATA FINDINGS

2024 DEVELOPMENTS

Fruit production impacted by adverse climate conditions in Brazil

Exports of fruits grow in importance, reaching records in value terms

PROSPECTS AND OPPORTUNITIES

Despite its high production of fruits, Brazil records low levels of consumption

Organic fruit being sought by Brazilians

Summary 4 - Major Processors of Fruits 2024

CATEGORY DATA

Table 41 - Total Sales of Fruits by Category: Total Volume 2019-2024

Table 42 - Total Sales of Fruits by Category: % Total Volume Growth 2019-2024

Table 43 - Retail Sales of Fruits by Category: Volume 2019-2024

Table 44 - Retail Sales of Fruits by Category: % Volume Growth 2019-2024

Table 45 - Retail Sales of Fruits by Category: Value 2019-2024

Table 46 - Retail Sales of Fruits by Category: % Value Growth 2019-2024

Table 47 - Retail Sales of Fruits by Packaged vs Unpackaged: % Volume 2019-2024

Table 48 - Forecast Total Sales of Fruits by Category: Total Volume 2024-2029

Table 49 - Forecast Total Sales of Fruits by Category: % Total Volume Growth 2024-2029

- Table 50 Forecast Retail Sales of Fruits by Category: Volume 2024-2029
- Table 51 Forecast Retail Sales of Fruits by Category: % Volume Growth 2024-2029
- Table 52 Forecast Retail Sales of Fruits by Category: Value 2024-2029
- Table 53 Forecast Retail Sales of Fruits by Category: % Value Growth 2024-2029

Meat in Brazil

KEY DATA FINDINGS

2024 DEVELOPMENTS

Traditional consumption of meat keeps sales high despite challenges

Beef undergoes a gourmet trend, with less traditional cuts receiving new names

PROSPECTS AND OPPORTUNITIES

Old cattle enter the dining scene and become a favourite amongst chefs Increasing concern with meat origin may boost subscription models Summary 5 - Major Processors of Meat 2024

CATEGORY DATA

- Table 54 Total Sales of Meat by Category: Total Volume 2019-2024
- Table 55 Total Sales of Meat by Category: % Total Volume Growth 2019-2024
- Table 56 Retail Sales of Meat by Category: Volume 2019-2024
- Table 57 Retail Sales of Meat by Category: % Volume Growth 2019-2024
- Table 58 Retail Sales of Meat by Category: Value 2019-2024
- Table 59 Retail Sales of Meat by Category: % Value Growth 2019-2024
- Table 60 Retail Sales of Meat by Packaged vs Unpackaged: % Volume 2019-2024
- Table 61 Forecast Sales of Meat by Category: Total Volume 2024-2029
- Table 62 Forecast Sales of Meat by Category: % Total Volume Growth 2024-2029
- Table 63 Forecast Retail Sales of Meat by Category: Volume 2024-2029
- Table 64 Forecast Retail Sales of Meat by Category: % Volume Growth 2024-2029
- Table 65 Forecast Retail Sales of Meat by Category: Value 2024-2029
- Table 66 Forecast Retail Sales of Meat by Category: % Value Growth 2024-2029

Nuts in Brazil

KEY DATA FINDINGS

2024 DEVELOPMENTS

Health benefits and protein content of nuts put them in the spotlight Peanuts increasing in importance due to use of certified seeds

PROSPECTS AND OPPORTUNITIES

Sustainable production of Brazil nuts promoted as added-value High prices of nuts are still a barrier to greater consumption

Summary 6 - Major Processors of Nuts 2024

CATEGORY DATA

- Table 67 Total Sales of Nuts by Category: Total Volume 2019-2024
- Table 68 Total Sales of Nuts by Category: % Total Volume Growth 2019-2024
- Table 69 Retail Sales of Nuts by Category: Volume 2019-2024
- Table 70 Retail Sales of Nuts by Category: % Volume Growth 2019-2024
- Table 71 Retail Sales of Nuts by Category: Value 2019-2024
- Table 72 Retail Sales of Nuts by Category: % Value Growth 2019-2024
- Table 73 Retail Sales of Nuts by Packaged vs Unpackaged: % Volume 2019-2024

- Table 74 Forecast Total Sales of Nuts by Category: Total Volume 2024-2029
- Table 75 Forecast Total Sales of Nuts by Category: % Total Volume Growth 2024-2029
- Table 76 Forecast Retail Sales of Nuts by Category: Volume 2024-2029
- Table 77 Forecast Retail Sales of Nuts by Category: % Volume Growth 2024-2029
- Table 78 Forecast Retail Sales of Nuts by Category: Value 2024-2029
- Table 79 Forecast Retail Sales of Nuts by Category: % Value Growth 2024-2029

Pulses in Brazil

KEY DATA FINDINGS

2024 DEVELOPMENTS

Pulses crops and production suffer from effects of climate change, resulting in pricing fluctuation Consumption of pulses in Brazil still relies on beans

PROSPECTS AND OPPORTUNITIES

Flexitarian diet set to help drive the consumption of pulses

Brazilian research organisation innovates with modified beans that do not cause intestinal discomfort

Summary 7 - Major Processors of Pulses 2024

CATEGORY DATA

- Table 80 Total Sales of Pulses by Category: Total Volume 2019-2024
- Table 81 Total Sales of Pulses by Category: % Total Volume Growth 2019-2024
- Table 82 Retail Sales of Pulses by Category: Volume 2019-2024
- Table 83 Retail Sales of Pulses by Category: % Volume Growth 2019-2024
- Table 84 Retail Sales of Pulses by Category: Value 2019-2024
- Table 85 Retail Sales of Pulses by Category: % Value Growth 2019-2024
- Table 86 Retail Sales of Pulses by Packaged vs Unpackaged: % Volume 2019-2024
- Table 87 Forecast Total Sales of Pulses by Category: Total Volume 2024-2029
- Table 88 Forecast Total Sales of Pulses by Category: % Total Volume Growth 2024-2029
- Table 89 Forecast Retail Sales of Pulses by Category: Volume 2024-2029
- Table 90 Forecast Retail Sales of Pulses by Category: % Volume Growth 2024-2029
- Table 91 Forecast Retail Sales of Pulses by Category: Value 2024-2029
- Table 92 Forecast Retail Sales of Pulses by Category: % Value Growth 2024-2029

Starchy Roots in Brazil

KEY DATA FINDINGS

2024 DEVELOPMENTS

Starchy roots heavily impacted by climate change

Potatoes and cassava are the most consumed starchy roots

PROSPECTS AND OPPORTUNITIES

Starchy roots as a gluten-free alternative

Shift in channel dynamics to expand offering of potatoes in retail

Summary 8 - Major Processors of Starchy Roots 2024

CATEGORY DATA

Table 93 - Total Sales of Starchy Roots by Category: Total Volume 2019-2024

Table 94 - Total Sales of Starchy Roots by Category: % Total Volume Growth 2019-2024

Table 95 - Retail Sales of Starchy Roots by Category: Volume 2019-2024

Table 96 - Retail Sales of Starchy Roots by Category: % Volume Growth 2019-2024

Table 97 - Retail Sales of Starchy Roots by Category: Value 2019-2024

- Table 98 Retail Sales of Starchy Roots by Category: % Value Growth 2019-2024
- Table 99 Retail Sales of Starchy Roots by Packaged vs Unpackaged: % Volume 2019-2024
- Table 100 Forecast Total Sales of Starchy Roots by Category: Total Volume 2024-2029
- Table 101 Forecast Total Sales of Starchy Roots by Category: % Total Volume Growth 2024-2029
- Table 102 Forecast Retail Sales of Starchy Roots by Category: Volume 2024-2029
- Table 103 Forecast Retail Sales of Starchy Roots by Category: % Volume Growth 2024-2029
- Table 104 Forecast Retail Sales of Starchy Roots by Category: Value 2024-2029
- Table 105 Forecast Retail Sales of Starchy Roots by Category: % Value Growth 2024-2029

Sugar and Sweeteners in Brazil

KEY DATA FINDINGS

2024 DEVELOPMENTS

Recovery of sugarcane in 2023 is harmed by droughts and wildfires in 2024

Future Fuel Law impacts sugarcane in Brazil

PROSPECTS AND OPPORTUNITIES

Brazilian government aims to reduce sugar as an ingredient in the industry

Stevia and other natural sweeteners in foodservice and retail

Summary 9 - Major Processors of Sugar and Sweeteners 2024

CATEGORY DATA

- Table 106 Total Sales of Sugar and Sweeteners: Total Volume 2019-2024
- Table 107 Total Sales of Sugar and Sweeteners: % Total Volume Growth 2019-2024
- Table 108 Retail Sales of Sugar and Sweeteners: Volume 2019-2024
- Table 109 Retail Sales of Sugar and Sweeteners: % Volume Growth 2019-2024
- Table 110 Retail Sales of Sugar and Sweeteners: Value 2019-2024
- Table 111 Retail Sales of Sugar and Sweeteners: % Value Growth 2019-2024
- Table 112 Retail Sales of Sugar and Sweeteners by Packaged vs Unpackaged: % Volume 2019-2024
- Table 113 Forecast Total Sales of Sugar and Sweeteners: Total Volume 2024-2029
- Table 114 Forecast Total Sales of Sugar and Sweeteners: % Total Volume Growth 2024-2029
- Table 115 Forecast Retail Sales of Sugar and Sweeteners: Volume 2024-2029
- Table 116 Forecast Retail Sales of Sugar and Sweeteners: % Volume Growth 2024-2029
- Table 117 Forecast Retail Sales of Sugar and Sweeteners: Value 2024-2029
- Table 118 Forecast Retail Sales of Sugar and Sweeteners: % Value Growth 2024-2029

Vegetables in Brazil

KEY DATA FINDINGS

2024 DEVELOPMENTS

El Niño causes instability in production, and low quality final produce

Brazilians shift from one vegetable to another according to changing prices

PROSPECTS AND OPPORTUNITIES

Plant-based diets and health trends set to boost the consumption of vegetables in Brazil, but there will also be challenges

Production of organic vegetables receives national incentives and is set to increase

Summary 10 - Major Processors of Vegetables 2024

CATEGORY DATA

- Table 119 Total Sales of Vegetables by Category: Total Volume 2019-2024
- Table 120 Total Sales of Vegetables by Category: % Total Volume Growth 2019-2024
- Table 121 Retail Sales of Vegetables by Category: Volume 2019-2024

- Table 122 Retail Sales of Vegetables by Category: % Volume Growth 2019-2024
- Table 123 Retail Sales of Vegetables by Category: Value 2019-2024
- Table 124 Retail Sales of Vegetables by Category: % Value Growth 2019-2024
- Table 125 Retail Sales of Vegetables by Packaged vs Unpackaged: % Volume 2019-2024
- Table 126 Forecast Total Sales of Vegetables by Category: Total Volume 2024-2029
- Table 127 Forecast Total Sales of Vegetables by Category: % Total Volume Growth 2024-2029
- Table 128 Forecast Retail Sales of Vegetables by Category: Volume 2024-2029
- Table 129 Forecast Retail Sales of Vegetables by Category: % Volume Growth 2024-2029
- Table 130 Forecast Retail Sales of Vegetables by Category: Value 2024-2029
- Table 131 Forecast Retail Sales of Vegetables by Category: % Value Growth 2024-2029

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 focusing 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/fresh-food-in-brazil/report.