



Dairy Products and Alternatives in Brazil

December 2025

Table of Contents

Dairy Products and Alternatives in Brazil

EXECUTIVE SUMMARY

Dairy products and alternatives in 2025: The big picture

Key trends in 2025

Competitive Landscape

Channel developments

What next for dairy products and alternatives?

MARKET DATA

Table 1 - Sales of Dairy Products and Alternatives by Category: Value 2020-2025

Table 2 - Sales of Dairy Products and Alternatives by Category: % Value Growth 2020-2025

Table 3 - NBO Company Shares of Dairy Products and Alternatives: % Value 2021-2025

Table 4 - LBN Brand Shares of Dairy Products and Alternatives: % Value 2022-2025

Table 5 - Penetration of Private Label by Category: % Value 2020-2025

Table 6 - Distribution of Dairy Products and Alternatives by Format: % Value 2020-2025

Table 7 - Forecast Sales of Dairy Products and Alternatives by Category: Value 2025-2030

Table 8 - Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2025-2030

DISCLAIMER

SOURCES

Summary 1 - Research Sources

[Baby Food in Brazil](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Baby food category growth follows birth rate and urbanization indexes

Nestle and Danone account for most sales of baby food

Health and beauty specialists lead the distribution of baby food

PROSPECTS AND OPPORTUNITIES

Sales set for growth thanks to urbanisation and an improving economy

Health and wellness trends point toward clean labels and local and organic sourcing

Dairy compounds face stricter legislation

CATEGORY DATA

Table 9 - Sales of Baby Food by Category: Volume 2020-2025

Table 10 - Sales of Baby Food by Category: Value 2020-2025

Table 11 - Sales of Baby Food by Category: % Volume Growth 2020-2025

Table 12 - Sales of Baby Food by Category: % Value Growth 2020-2025

Table 13 - Sales of Growing-Up Milk Formula by Age: % Value 2020-2025

Table 14 - NBO Company Shares of Baby Food: % Value 2021-2025

Table 15 - LBN Brand Shares of Baby Food: % Value 2022-2025

Table 16 - Distribution of Baby Food by Format: % Value 2020-2025

Table 17 - Forecast Sales of Baby Food by Category: Volume 2025-2030

Table 18 - Forecast Sales of Baby Food by Category: Value 2025-2030

Table 19 - Forecast Sales of Baby Food by Category: % Volume Growth 2025-2030

Table 20 - Forecast Sales of Baby Food by Category: % Value Growth 2025-2030

[Butter and Spreads in Brazil](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Butter and spreads grows in value despite inflation and changing consumer habits
BRF and JBS stand out with strong portfolios
Supermarkets lead sales while small local grocers lose relevance

PROSPECTS AND OPPORTUNITIES

Macroeconomic stability and increased production should boost sales
Non-dairy alternatives and healthier options expected to gain more relevance
Sales set to benefit from omnichannel strategies

CATEGORY DATA

Table 21 - Sales of Butter and Spreads by Category: Volume 2020-2025
Table 22 - Sales of Butter and Spreads by Category: Value 2020-2025
Table 23 - Sales of Butter and Spreads by Category: % Volume Growth 2020-2025
Table 24 - Sales of Butter and Spreads by Category: % Value Growth 2020-2025
Table 25 - NBO Company Shares of Butter and Spreads: % Value 2021-2025
Table 26 - LBN Brand Shares of Butter and Spreads: % Value 2022-2025
Table 27 - Distribution of Butter and Spreads by Format: % Value 2020-2025
Table 28 - Forecast Sales of Butter and Spreads by Category: Volume 2025-2030
Table 29 - Forecast Sales of Butter and Spreads by Category: Value 2025-2030
Table 30 - Forecast Sales of Butter and Spreads by Category: % Volume Growth 2025-2030
Table 31 - Forecast Sales of Butter and Spreads by Category: % Value Growth 2025-2030

Cheese in Brazil

KEY DATA FINDINGS

2025 DEVELOPMENTS

Macroeconomic factors bring stability promoting volume growth in the category
Polenghi cements its lead through marketing and innovation
Small local grocers facing competition from supermarkets and convenience stores

PROSPECTS AND OPPORTUNITIES

Cheese set to benefit from economic stability and increased variety
Cheese innovation expected to be influenced by health and indulgence trends
Legislation efforts aim to improve product quality within cheese

CATEGORY DATA

Table 32 - Sales of Cheese by Category: Volume 2020-2025
Table 33 - Sales of Cheese by Category: Value 2020-2025
Table 34 - Sales of Cheese by Category: % Volume Growth 2020-2025
Table 35 - Sales of Cheese by Category: % Value Growth 2020-2025
Table 36 - Sales of Spreadable Cheese by Type: % Value 2020-2025
Table 37 - Sales of Soft Cheese by Type: % Value 2020-2025
Table 38 - Sales of Hard Cheese by Type: % Value 2020-2025
Table 39 - NBO Company Shares of Cheese: % Value 2021-2025
Table 40 - LBN Brand Shares of Cheese: % Value 2022-2025
Table 41 - Distribution of Cheese by Format: % Value 2020-2025
Table 42 - Forecast Sales of Cheese by Category: Volume 2025-2030
Table 43 - Forecast Sales of Cheese by Category: Value 2025-2030
Table 44 - Forecast Sales of Cheese by Category: % Volume Growth 2025-2030
Table 45 - Forecast Sales of Cheese by Category: % Value Growth 2025-2030

Drinking Milk Products in Brazil

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sales of drinking milk products pushed by controlled prices and health and wellness trends
Lactalis delivers dynamic growth thanks to ongoing investments in marketing and innovation
Small local grocers still lead sales despite losing share

PROSPECTS AND OPPORTUNITIES

Controlled inflation and local production expected to drive category growth
The category's alignment with current health and wellness trends will be key to growth
Logistical improvements needed for cold chain storage

CATEGORY DATA

Table 46 - Sales of Drinking Milk Products by Category: Volume 2020-2025
Table 47 - Sales of Drinking Milk Products by Category: Value 2020-2025
Table 48 - Sales of Drinking Milk Products by Category: % Volume Growth 2020-2025
Table 49 - Sales of Drinking Milk Products by Category: % Value Growth 2020-2025
Table 50 - NBO Company Shares of Drinking Milk Products: % Value 2021-2025
Table 51 - LBN Brand Shares of Drinking Milk Products: % Value 2022-2025
Table 52 - Distribution of Drinking Milk Products by Format: % Value 2020-2025
Table 53 - Forecast Sales of Drinking Milk Products by Category: Volume 2025-2030
Table 54 - Forecast Sales of Drinking Milk Products by Category: Value 2025-2030
Table 55 - Forecast Sales of Drinking Milk Products by Category: % Volume Growth 2025-2030
Table 56 - Forecast Sales of Drinking Milk Products by Category: % Value Growth 2025-2030

Yoghurt and Sour Milk Products in Brazil

KEY DATA FINDINGS

2025 DEVELOPMENTS

Yoghurt increasingly seen as a healthy indulgence suitable for convenient snacking
Danone leads with extensive portfolio and health and wellness alignment
Supermarkets benefit from extensive refrigeration aisles and high bargain power

PROSPECTS AND OPPORTUNITIES

Healthy eating trends and a stable economy bode well for yoghurt
Innovation will remain central to the category
Yoghurt innovation leaning towards 'food as medicine' concept

CATEGORY DATA

Table 57 - Sales of Yoghurt and Sour Milk Products by Category: Volume 2020-2025
Table 58 - Sales of Yoghurt and Sour Milk Products by Category: Value 2020-2025
Table 59 - Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2020-2025
Table 60 - Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2020-2025
Table 61 - Sales of Flavoured Yoghurt by Flavour: Rankings 2020-2025
Table 62 - NBO Company Shares of Yoghurt and Sour Milk Products: % Value 2021-2025
Table 63 - LBN Brand Shares of Yoghurt and Sour Milk Products: % Value 2022-2025
Table 64 - Distribution of Yoghurt and Sour Milk Products by Format: % Value 2020-2025
Table 65 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Volume 2025-2030
Table 66 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Value 2025-2030
Table 67 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2025-2030
Table 68 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2025-2030

Other Dairy in Brazil

KEY DATA FINDINGS

2025 DEVELOPMENTS

Other dairy category shows maturity and resilience amid price hikes

Nestlé benefits from its large portfolio while Danone drives innovation

Supermarkets benefit from offering a broad range of products

PROSPECTS AND OPPORTUNITIES

Consistent consumer demand and innovation should support growth in other dairy

Health and wellness trends set to influence the market's development

Legislation developments aim at clearer labelling and to assure products' quality

CATEGORY DATA

Table 69 - Sales of Other Dairy by Category: Volume 2020-2025

Table 70 - Sales of Other Dairy by Category: Value 2020-2025

Table 71 - Sales of Other Dairy by Category: % Volume Growth 2020-2025

Table 72 - Sales of Other Dairy by Category: % Value Growth 2020-2025

Table 73 - Sales of Cream by Type: % Value 2020-2025

Table 74 - NBO Company Shares of Other Dairy: % Value 2021-2025

Table 75 - LBN Brand Shares of Other Dairy: % Value 2022-2025

Table 76 - Distribution of Other Dairy by Format: % Value 2020-2025

Table 77 - Forecast Sales of Other Dairy by Category: Volume 2025-2030

Table 78 - Forecast Sales of Other Dairy by Category: Value 2025-2030

Table 79 - Forecast Sales of Other Dairy by Category: % Volume Growth 2025-2030

Table 80 - Forecast Sales of Other Dairy by Category: % Value Growth 2025-2030

Plant-Based Dairy in Brazil

KEY DATA FINDINGS

2025 DEVELOPMENTS

Plant-based dairy sees strong value growth in 2025 as prices rise

Ades retains the lead in 2025 but faces mounting competition as demand grows

Supermarkets benefit from visibility, accessibility and choice

PROSPECTS AND OPPORTUNITIES

Plant-based dairy set to benefit from shifts in consumer behaviour

Health and wellness trend set to inform plant-based innovation

Decrees aim at fair competition among animal and plant-based dairy, with clearer labelling

CATEGORY DATA

Table 81 - Sales of Plant-Based Dairy by Category: Value 2020-2025

Table 82 - Sales of Plant-Based Dairy by Category: % Value Growth 2020-2025

Table 83 - Sales of Other Plant-Based Milk by Type: % Value 2022-2025

Table 84 - NBO Company Shares of Plant-Based Dairy: % Value 2021-2025

Table 85 - LBN Brand Shares of Plant-Based Dairy: % Value 2022-2025

Table 86 - Distribution of Plant-Based Dairy by Format: % Value 2020-2025

Table 87 - Forecast Sales of Plant-Based Dairy by Category: Value 2025-2030

Table 88 - Forecast Sales of Plant-Based Dairy by Category: % Value Growth 2025-2030

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 focussing 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/dairy-products-and-alternatives-in-brazil/report.