



# Cooking Ingredients and Meals in Brazil

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## Cooking Ingredients and Meals in Brazil

### EXECUTIVE SUMMARY

Volume-led growth and health innovation shape cooking ingredients and meals in 2025

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

Volume-led recovery driven by value-seeking behaviour in 2025

Health driven reformulation influence purchases across cooking ingredients and meals in 2025

More consumers reach for functional convenience and fitness-influenced products

#### WHAT'S NEXT?

Macroeconomic stabilisation and demographic tailwinds will support steady value expansion

Innovation, reformulation and regulation are expected to drive premiumisation

Channel diversification is set to strengthen both value and premium options

#### COMPETITIVE LANDSCAPE

Cargill Agrícola SA's scale, innovation and brand power sustain its leadership in Brazil

BRF SA's brand revitalisation and dynamism drive accelerated growth

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Stabilising economy and premiumisation are set to support renewed growth

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Bunge sustains its leadership through scale, integration and brand strength

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Ready meals and soups is set for growth during economic recovery and evolving lifestyles

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BRF SA maintains its leadership through brand strength, scale and nationwide distribution

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### Sweet Spreads in Brazil

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#### INDUSTRY PERFORMANCE

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Health and wellness trends will shape innovation, even as indulgence remains a core driver

Sustainability is set to shape sweet spreads with eco-friendly packaging and ethical sourcing

#### COMPETITIVE LANDSCAPE

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