



Staple Foods in Brazil

March 2026

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Staple Foods in Brazil

EXECUTIVE SUMMARY

Staples remain resilient as inflation and downtrading shape spending

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Rising food prices support continued value growth

Consumers shift towards warehouse clubs as private label expands

Regulations boost impact of current health trends

WHAT'S NEXT?

Essential nature of staple foods ensures further growth

Developments in distribution to further bolster sales

Health, sustainability and convenience as key innovation drivers

COMPETITIVE LANDSCAPE

Camil leads through strong legacy and diverse offering

BRF rises rapidly thanks to aggressive strategy

CHANNELS

Warehouse clubs leads overall distribution as consumers seek out value-for-money

Warehouse clubs sees rapid growth, stealing share from small local grocers

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Baked Goods in Brazil

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Bread-led staples underpin growth as shoppers remain price conscious

INDUSTRY PERFORMANCE

Baked goods performs due to macroeconomic resilience and rising incomes

Savvy consumers seek out low-cost but healthy options

Players focus on sustainable supply as consumers shift away from indulgent treats

WHAT'S NEXT?

Stable macroeconomic scenario and demographic expansion bode well for baked goods
Health and wellness trends shape development, especially in bread
Environmental and climate considerations increasingly influence baked goods in Brazil

COMPETITIVE LANDSCAPE

Bimbo leads through broad offering and acquisitions
Landscape remains largely stable in 2025
Private label and major local player make progress

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[Breakfast Cereals in Brazil](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Hot cereals leads as value seeking and health concerns reshape breakfast choices

INDUSTRY PERFORMANCE

Inflation and consumer preferences shape development in breakfast cereals
Private label expands as health trends shape progress
Hot cereals sees fastest growth in 2025

WHAT'S NEXT?

Breakfast cereals poised for strong growth amid economic stability and demographic expansion
Innovation in terms of functional benefits and cleaner labels
Producers reformulate in line with wellness preferences

COMPETITIVE LANDSCAPE

Traditional brand Quaker focuses on new consumers to maintain leadership
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[Processed Fruit and Vegetables in Brazil](#)

KEY DATA FINDINGS

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INDUSTRY PERFORMANCE

Economic stress forces consumers to prioritise essential items in their baskets

Category progress remains dependent on climatic conditions

Brazilian consumers remain wary of frozen fruit

WHAT'S NEXT?

Strong growth anticipated in response to convenience demand

Health and wellness trends will support category sales

Sustainability comes into sharper focus

COMPETITIVE LANDSCAPE

Heinz continues to lead through Quero brand

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[Processed Meat, Seafood and Alternatives To Meat in Brazil](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Budget-driven protein choices reshape category demand

INDUSTRY PERFORMANCE

Inflation and tight budgets altered dietary habits in favour of processed protein foods

Value-driven shopping habits support private label and low-cost options

Health and sustainability remain key trend shaping development

WHAT'S NEXT?

Economic stability to support protein purchases in forecast period

Meat alternatives to see further expansion

Sustainability as pivotal theme impacting consumer expectations and industry practices

COMPETITIVE LANDSCAPE

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[Rice, Pasta and Noodles in Brazil](#)

KEY DATA FINDINGS

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Carbohydrate staples lose ground as diets diversify

INDUSTRY PERFORMANCE

Value sales fall as consumer habits shift
Private label expansion subverts value growth
Pasta gains value as rice lifts volume despite price pressure

WHAT'S NEXT?

Economic stability and demographic expansion should boost category sales
Staple carbohydrates repositioned as part of a balanced, wellness-oriented lifestyle
Environmental considerations increasingly shape production, packaging and supply chain strategies

COMPETITIVE LANDSCAPE

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Innovative launches bolster leading player
Nissin sees solid growth

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