



Euromonitor  
International

# Fresh Food in Brazil

February 2024

Table of Contents

## Fresh Food in Brazil

### EXECUTIVE SUMMARY

Fresh food in 2023: The big picture

2023 key trends

Retailing developments

What next for fresh food?

### MARKET DATA

Table 1 - Total Sales of Fresh Food by Category: Total Volume 2018-2023

Table 2 - Total Sales of Fresh Food by Category: % Total Volume Growth 2018-2023

Table 3 - Retail Sales of Fresh Food by Category: Volume 2018-2023

Table 4 - Retail Sales of Fresh Food by Category: % Volume Growth 2018-2023

Table 5 - Retail Sales of Fresh Food by Category: Value 2018-2023

Table 6 - Retail Sales of Fresh Food by Category: % Value Growth 2018-2023

Table 7 - Retail Sales of Fresh Food by Packaged vs Unpackaged: % Volume 2018-2023

Table 8 - Retail Distribution of Fresh Food by Format: % Volume 2018-2023

Table 9 - Forecast Total Sales of Fresh Food by Category: Total Volume 2023-2028

Table 10 - Forecast Total Sales of Fresh Food by Category: % Total Volume Growth 2023-2028

Table 11 - Forecast Retail Sales of Fresh Food by Category: Volume 2023-2028

Table 12 - Forecast Retail Sales of Fresh Food by Category: % Volume Growth 2023-2028

Table 13 - Forecast Retail Sales of Fresh Food by Category: Value 2023-2028

Table 14 - Forecast Retail Sales of Fresh Food by Category: % Value Growth 2023-2028

### DISCLAIMER

### SOURCES

Summary 1 - Research Sources

## Eggs in Brazil

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Robust growth and ongoing optimism in Brazil's egg industry

The expanding subscription model within the egg industry

#### PROSPECTS AND OPPORTUNITIES

A growing shift towards affordable protein benefits eggs on the Brazilian landscape

The egg industry soars in exports, with positive projections for 2024

Summary 2 - Major Processors of Eggs 2023

### CATEGORY DATA

Table 15 - Total Sales of Eggs: Total Volume 2018-2023

Table 16 - Total Sales of Eggs: % Total Volume Growth 2018-2023

Table 17 - Retail Sales of Eggs: Volume 2018-2023

Table 18 - Retail Sales of Eggs: % Volume Growth 2018-2023

Table 19 - Retail Sales of Eggs: Value 2018-2023

Table 20 - Retail Sales of Eggs: % Value Growth 2018-2023

Table 21 - Retail Sales of Eggs by Packaged vs Unpackaged: % Volume 2018-2023

Table 22 - Forecast Total Sales of Eggs: Total Volume 2023-2028

Table 23 - Forecast Total Sales of Eggs: % Total Volume Growth 2023-2028

Table 24 - Forecast Retail Sales of Eggs: Volume 2023-2028

Table 25 - Forecast Retail Sales of Eggs: % Volume Growth 2023-2028

Table 26 - Forecast Retail Sales of Eggs: Value 2023-2028

Table 27 - Forecast Retail Sales of Eggs: % Value Growth 2023-2028

## Fish and Seafood in Brazil

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Expanding production, international markets and consumer dynamics in Brazil

Challenges and innovations in alternative protein consumption

#### PROSPECTS AND OPPORTUNITIES

A new government leads to a changing era for Brazil's fish and seafood industry

Sustainable growth and the global appetite for aquatic food

Summary 3 - Major Processors of Fish and Seafood 2023

#### CATEGORY DATA

Table 28 - Total Sales of Fish and Seafood by Category: Total Volume 2018-2023

Table 29 - Total Sales of Fish and Seafood by Category: % Total Volume Growth 2018-2023

Table 30 - Retail Sales of Fish and Seafood by Category: Volume 2018-2023

Table 31 - Retail Sales of Fish and Seafood by Category: % Volume Growth 2018-2023

Table 32 - Retail Sales of Fish and Seafood by Category: Value 2018-2023

Table 33 - Retail Sales of Fish and Seafood by Category: % Value Growth 2018-2023

Table 34 - Retail Sales of Fish and Seafood by Packaged vs Unpackaged: % Volume 2018-2023

Table 35 - Forecast Total Sales of Fish and Seafood by Category: Total Volume 2023-2028

Table 36 - Forecast Total Sales of Fish and Seafood by Category: % Total Volume Growth 2023-2028

Table 37 - Forecast Retail Sales of Fish and Seafood by Category: Volume 2023-2028

Table 38 - Forecast Retail Sales of Fish and Seafood by Category: % Volume Growth 2023-2028

Table 39 - Forecast Retail Sales of Fish and Seafood by Category: Value 2023-2028

Table 40 - Forecast Retail Sales of Fish and Seafood by Category: % Value Growth 2023-2028

## Fruits in Brazil

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Climate challenges, price trends and consumer dynamics in bananas and apples

Fruit market trends in 2023 and rising prospects for 2024

#### PROSPECTS AND OPPORTUNITIES

Enhancing agricultural transparency through traceability

The health and wellness trend drives higher consumption of fruit

Summary 4 - Major Processors of Fruits 2023

#### CATEGORY DATA

Table 41 - Total Sales of Fruits by Category: Total Volume 2018-2023

Table 42 - Total Sales of Fruits by Category: % Total Volume Growth 2018-2023

Table 43 - Retail Sales of Fruits by Category: Volume 2018-2023

Table 44 - Retail Sales of Fruits by Category: % Volume Growth 2018-2023

Table 45 - Retail Sales of Fruits by Category: Value 2018-2023

Table 46 - Retail Sales of Fruits by Category: % Value Growth 2018-2023

Table 47 - Retail Sales of Fruits by Packaged vs Unpackaged: % Volume 2018-2023

Table 48 - Forecast Total Sales of Fruits by Category: Total Volume 2023-2028

Table 49 - Forecast Total Sales of Fruits by Category: % Total Volume Growth 2023-2028

Table 50 - Forecast Retail Sales of Fruits by Category: Volume 2023-2028

Table 51 - Forecast Retail Sales of Fruits by Category: % Volume Growth 2023-2028

Table 52 - Forecast Retail Sales of Fruits by Category: Value 2023-2028

Table 53 - Forecast Retail Sales of Fruits by Category: % Value Growth 2023-2028

## Meat in Brazil

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Animal protein dynamics and the strong consumption of poultry and pork

Transforming the landscape of protein choices in the Brazilian market

#### PROSPECTS AND OPPORTUNITIES

Exploring subscription models for meat on the Brazilian landscape

The rise of plant-based diets reshapes the future of meat consumption

Summary 5 - Major Processors of Meat 2023

#### CATEGORY DATA

Table 54 - Total Sales of Meat by Category: Total Volume 2018-2023

Table 55 - Total Sales of Meat by Category: % Total Volume Growth 2018-2023

Table 56 - Retail Sales of Meat by Category: Volume 2018-2023

Table 57 - Retail Sales of Meat by Category: % Volume Growth 2018-2023

Table 58 - Retail Sales of Meat by Category: Value 2018-2023

Table 59 - Retail Sales of Meat by Category: % Value Growth 2018-2023

Table 60 - Retail Sales of Meat by Packaged vs Unpackaged: % Volume 2018-2023

Table 61 - Forecast Sales of Meat by Category: Total Volume 2023-2028

Table 62 - Forecast Sales of Meat by Category: % Total Volume Growth 2023-2028

Table 63 - Forecast Retail Sales of Meat by Category: Volume 2023-2028

Table 64 - Forecast Retail Sales of Meat by Category: % Volume Growth 2023-2028

Table 65 - Forecast Retail Sales of Meat by Category: Value 2023-2028

Table 66 - Forecast Retail Sales of Meat by Category: % Value Growth 2023-2028

## Nuts in Brazil

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

The ongoing potential for green coconut and peanuts in Brazil

The expanding nut market benefits from the rise of healthy eating

#### PROSPECTS AND OPPORTUNITIES

The rise of peanut and nut consumption in varied formats

Barriers to the consumption of nuts across the forecast period

Summary 6 - Major Processors of Nuts 2023

#### CATEGORY DATA

Table 67 - Total Sales of Nuts by Category: Total Volume 2018-2023

Table 68 - Total Sales of Nuts by Category: % Total Volume Growth 2018-2023

Table 69 - Retail Sales of Nuts by Category: Volume 2018-2023

Table 70 - Retail Sales of Nuts by Category: % Volume Growth 2018-2023

Table 71 - Retail Sales of Nuts by Category: Value 2018-2023

Table 72 - Retail Sales of Nuts by Category: % Value Growth 2018-2023

Table 73 - Retail Sales of Nuts by Packaged vs Unpackaged: % Volume 2018-2023

Table 74 - Forecast Total Sales of Nuts by Category: Total Volume 2023-2028

Table 75 - Forecast Total Sales of Nuts by Category: % Total Volume Growth 2023-2028

Table 76 - Forecast Retail Sales of Nuts by Category: Volume 2023-2028

Table 77 - Forecast Retail Sales of Nuts by Category: % Volume Growth 2023-2028

Table 78 - Forecast Retail Sales of Nuts by Category: Value 2023-2028

Table 79 - Forecast Retail Sales of Nuts by Category: % Value Growth 2023-2028

## Pulses in Brazil

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Price rises and traditional menus impact consumption on the Brazilian market

The rise of cash & carry retailers as consumers search for affordable options

#### PROSPECTS AND OPPORTUNITIES

A lower supply of pulses impacts prices over the forecast period

Positive outlook for the Brazilian economy drives fresh food consumption

Summary 7 - Major Processors of Pulses 2023

### CATEGORY DATA

Table 80 - Total Sales of Pulses by Category: Total Volume 2018-2023

Table 81 - Total Sales of Pulses by Category: % Total Volume Growth 2018-2023

Table 82 - Retail Sales of Pulses by Category: Volume 2018-2023

Table 83 - Retail Sales of Pulses by Category: % Volume Growth 2018-2023

Table 84 - Retail Sales of Pulses by Category: Value 2018-2023

Table 85 - Retail Sales of Pulses by Category: % Value Growth 2018-2023

Table 86 - Retail Sales of Pulses by Packaged vs Unpackaged: % Volume 2018-2023

Table 87 - Forecast Total Sales of Pulses by Category: Total Volume 2023-2028

Table 88 - Forecast Total Sales of Pulses by Category: % Total Volume Growth 2023-2028

Table 89 - Forecast Retail Sales of Pulses by Category: Volume 2023-2028

Table 90 - Forecast Retail Sales of Pulses by Category: % Volume Growth 2023-2028

Table 91 - Forecast Retail Sales of Pulses by Category: Value 2023-2028

Table 92 - Forecast Retail Sales of Pulses by Category: % Value Growth 2023-2028

## Starchy Roots in Brazil

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Supply and demand shapes consumption patterns of cassava in 2023

Changes within potato farming align with rising consumer demands

#### PROSPECTS AND OPPORTUNITIES

Adapting to unpredictability by offering packaged starchy roots

Potatoes are key options for vegetarian, vegan and flexitarian consumers

Summary 8 - Major Processors of Starchy Roots 2023

### CATEGORY DATA

Table 93 - Total Sales of Starchy Roots by Category: Total Volume 2018-2023

Table 94 - Total Sales of Starchy Roots by Category: % Total Volume Growth 2018-2023

Table 95 - Retail Sales of Starchy Roots by Category: Volume 2018-2023

Table 96 - Retail Sales of Starchy Roots by Category: % Volume Growth 2018-2023

Table 97 - Retail Sales of Starchy Roots by Category: Value 2018-2023

- Table 98 - Retail Sales of Starchy Roots by Category: % Value Growth 2018-2023
- Table 99 - Retail Sales of Starchy Roots by Packaged vs Unpackaged: % Volume 2018-2023
- Table 100 - Forecast Total Sales of Starchy Roots by Category: Total Volume 2023-2028
- Table 101 - Forecast Total Sales of Starchy Roots by Category: % Total Volume Growth 2023-2028
- Table 102 - Forecast Retail Sales of Starchy Roots by Category: Volume 2023-2028
- Table 103 - Forecast Retail Sales of Starchy Roots by Category: % Volume Growth 2023-2028
- Table 104 - Forecast Retail Sales of Starchy Roots by Category: Value 2023-2028
- Table 105 - Forecast Retail Sales of Starchy Roots by Category: % Value Growth 2023-2028

## Sugar and Sweeteners in Brazil

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Total volume sales fall as exports increase on the sugar market  
Proposed changes in fuel blend policies and its impact on sugar

#### PROSPECTS AND OPPORTUNITIES

A growing awareness of the risks associated with sugar, shape consumption habits  
Seizing opportunities in the global sugar market and energy transition  
Summary 9 - Major Processors of Sugar and Sweeteners 2023

#### CATEGORY DATA

- Table 106 - Total Sales of Sugar and Sweeteners: Total Volume 2018-2023
- Table 107 - Total Sales of Sugar and Sweeteners: % Total Volume Growth 2018-2023
- Table 108 - Retail Sales of Sugar and Sweeteners: Volume 2018-2023
- Table 109 - Retail Sales of Sugar and Sweeteners: % Volume Growth 2018-2023
- Table 110 - Retail Sales of Sugar and Sweeteners: Value 2018-2023
- Table 111 - Retail Sales of Sugar and Sweeteners: % Value Growth 2018-2023
- Table 112 - Retail Sales of Sugar and Sweeteners by Packaged vs Unpackaged: % Volume 2018-2023
- Table 113 - Forecast Total Sales of Sugar and Sweeteners: Total Volume 2023-2028
- Table 114 - Forecast Total Sales of Sugar and Sweeteners: % Total Volume Growth 2023-2028
- Table 115 - Forecast Retail Sales of Sugar and Sweeteners: Volume 2023-2028
- Table 116 - Forecast Retail Sales of Sugar and Sweeteners: % Volume Growth 2023-2028
- Table 117 - Forecast Retail Sales of Sugar and Sweeteners: Value 2023-2028
- Table 118 - Forecast Retail Sales of Sugar and Sweeteners: % Value Growth 2023-2028

## Vegetables in Brazil

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

The impact of vegetable harvests on total volume sales in 2023  
Packaged and frozen fresh products meet consumer demands for convenience and affordability

#### PROSPECTS AND OPPORTUNITIES

Reduction in fresh food harvest amidst the soaring prices of grain  
Flexitarians and rising health trends drive positive growth for vegetables  
Summary 10 - Major Processors of Vegetables 2023

#### CATEGORY DATA

- Table 119 - Total Sales of Vegetables by Category: Total Volume 2018-2023
- Table 120 - Total Sales of Vegetables by Category: % Total Volume Growth 2018-2023
- Table 121 - Retail Sales of Vegetables by Category: Volume 2018-2023

Table 122 - Retail Sales of Vegetables by Category: % Volume Growth 2018-2023

Table 123 - Retail Sales of Vegetables by Category: Value 2018-2023

Table 124 - Retail Sales of Vegetables by Category: % Value Growth 2018-2023

Table 125 - Retail Sales of Vegetables by Packaged vs Unpackaged: % Volume 2018-2023

Table 126 - Forecast Total Sales of Vegetables by Category: Total Volume 2023-2028

Table 127 - Forecast Total Sales of Vegetables by Category: % Total Volume Growth 2023-2028

Table 128 - Forecast Retail Sales of Vegetables by Category: Volume 2023-2028

Table 129 - Forecast Retail Sales of Vegetables by Category: % Volume Growth 2023-2028

Table 130 - Forecast Retail Sales of Vegetables by Category: Value 2023-2028

Table 131 - Forecast Retail Sales of Vegetables by Category: % Value Growth 2023-2028

## 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 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/fresh-food-in-brazil/report](http://www.euromonitor.com/fresh-food-in-brazil/report).