

# **Snacks in Brazil**

October 2024

Table of Contents

## Snacks in Brazil

## EXECUTIVE SUMMARY

Snacks in 2024: The big picture Key trends in 2024 Competitive Landscape Channel developments What next for snacks?

#### MARKET DATA

Table 1 - Sales of Snacks by Category: Volume 2019-2024Table 2 - Sales of Snacks by Category: Value 2019-2024Table 3 - Sales of Snacks by Category: % Volume Growth 2019-2024Table 4 - Sales of Snacks by Category: % Value Growth 2019-2024Table 5 - NBO Company Shares of Snacks: % Value 2020-2024Table 6 - LBN Brand Shares of Snacks: % Value 2021-2024Table 7 - Penetration of Private Label by Category: % Value 2019-2024Table 8 - Distribution of Snacks by Format: % Value 2019-2024Table 9 - Forecast Sales of Snacks by Category: Volume 2024-2029Table 10 - Forecast Sales of Snacks by Category: % Volume Growth 2024-2029Table 11 - Forecast Sales of Snacks by Category: % Value Growth 2024-2029Table 12 - Forecast Sales of Snacks by Category: % Value Growth 2024-2029

#### DISCLAIMER

SOURCES

Summary 1 - Research Sources

Chocolate Confectionery in Brazil

## **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Chocolate confectionery posts another solid year of growth, supported by Brazil's gifting culture Polarised consumption reflected in a wide range of price tiers In-store environment leads to experimentation and unconventional investments in brand awareness

#### PROSPECTS AND OPPORTUNITIES

Higher focus on ingredients and health concerns over the forecast period Chocolate as a tourist attraction and its link to entertainment Responsible indulgence: Sustainability gains traction as a claim of differentiation

#### CATEGORY DATA

Summary 2 - Other Chocolate Confectionery by Product Type: 2024 Table 13 - Sales of Chocolate Confectionery by Category: Volume 2019-2024 Table 14 - Sales of Chocolate Confectionery by Category: Value 2019-2024 Table 15 - Sales of Chocolate Confectionery by Category: % Volume Growth 2019-2024 Table 16 - Sales of Chocolate Confectionery by Category: % Value Growth 2019-2024 Table 17 - Sales of Chocolate Tablets by Type: % Value 2019-2024 Table 18 - NBO Company Shares of Chocolate Confectionery: % Value 2020-2024 Table 19 - LBN Brand Shares of Chocolate Confectionery: % Value 2021-2024 Table 20 - Distribution of Chocolate Confectionery by Format: % Value 2019-2024 Table 21 - Forecast Sales of Chocolate Confectionery by Category: Volume 2024-2029 Table 22 - Forecast Sales of Chocolate Confectionery by Category: Value 2024-2029 Table 23 - Forecast Sales of Chocolate Confectionery by Category: % Volume Growth 2024-2029Table 24 - Forecast Sales of Chocolate Confectionery by Category: % Value Growth 2024-2029

## Gum in Brazil

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Price adjustments lead value growth, despite volume stability Strong campaigns focus on younger consumers and events Impulse purchases motivated by social occasions drive consumption

#### PROSPECTS AND OPPORTUNITIES

Gum inspires launches in other categories, with traditional brands leading the movement Diversity and inclusion update brand positioning ??to better connect with younger audience Functionality and health and wellness as important drivers

#### CATEGORY DATA

Table 25 - Sales of Gum by Category: Volume 2019-2024Table 26 - Sales of Gum by Category: Value 2019-2024Table 27 - Sales of Gum by Category: % Volume Growth 2019-2024Table 28 - Sales of Gum by Category: % Value Growth 2019-2024Table 29 - Sales of Gum by Flavour: Rankings 2019-2024Table 30 - NBO Company Shares of Gum: % Value 2020-2024Table 31 - LBN Brand Shares of Gum: % Value 2021-2024Table 32 - Distribution of Gum by Format: % Value 2019-2024Table 33 - Forecast Sales of Gum by Category: Volume 2024-2029Table 34 - Forecast Sales of Gum by Category: % Volume Growth 2024-2029Table 35 - Forecast Sales of Gum by Category: % Value Growth 2024-2029Table 36 - Forecast Sales of Gum by Category: % Value Growth 2024-2029

## Sugar Confectionery in Brazil

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Stability amid post-pandemic recovery New flavours, formats and campaigns encourage sales Social occasions fuel impulse purchases and consumption

#### PROSPECTS AND OPPORTUNITIES

More knowledgeable consumers and higher expectations for functionality New collaborations with other industries and distribution formats as growth avenues Growing Halloween culture expected to support sales in Brazil

## CATEGORY DATA

Summary 3 - Other Sugar Confectionery by Product Type: 2024 Table 37 - Sales of Sugar Confectionery by Category: Volume 2019-2024 Table 38 - Sales of Sugar Confectionery by Category: Value 2019-2024 Table 39 - Sales of Sugar Confectionery by Category: % Volume Growth 2019-2024 Table 40 - Sales of Sugar Confectionery by Category: % Value Growth 2019-2024 Table 41 - Sales of Pastilles, Gummies, Jellies and Chews by Type: % Value 2019-2024 Table 42 - NBO Company Shares of Sugar Confectionery: % Value 2020-2024 Table 43 - LBN Brand Shares of Sugar Confectionery: % Value 2021-2024 
 Table 44 - Distribution of Sugar Confectionery by Format: % Value 2019-2024

Table 45 - Forecast Sales of Sugar Confectionery by Category: Volume 2024-2029

Table 46 - Forecast Sales of Sugar Confectionery by Category: Value 2024-2029

Table 47 - Forecast Sales of Sugar Confectionery by Category: % Volume Growth 2024-2029

Table 48 - Forecast Sales of Sugar Confectionery by Category: % Value Growth 2024-2029

Ice Cream in Brazil

## **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Ice cream maintains steady growth despite inflationary pressures Novelties leverage consumption with appealing launches and collaborations Pistachio fever leveraged by social media platforms

## PROSPECTS AND OPPORTUNITIES

Continuous heatwaves expected to remain relevant over forecast period Consumers searching for healthy options will drive functionality Players will continue to leverage innovation and premiumisation to drive value

## CATEGORY DATA

Table 49 - Sales of Ice Cream by Category: Volume 2019-2024 Table 50 - Sales of Ice Cream by Category: Value 2019-2024 Table 51 - Sales of Ice Cream by Category: % Volume Growth 2019-2024 Table 52 - Sales of Ice Cream by Category: % Value Growth 2019-2024 Table 53 - Sales of Ice Cream by Leading Flavours: Rankings 2019-2024 Table 54 - Sales of Impulse Ice Cream by Format: % Value 2019-2024 Table 55 - NBO Company Shares of Ice Cream: % Value 2020-2024 Table 56 - LBN Brand Shares of Ice Cream: % Value 2021-2024 Table 57 - NBO Company Shares of Impulse Ice Cream: % Value 2020-2024 Table 58 - LBN Brand Shares of Impulse Ice Cream: % Value 2021-2024 Table 59 - NBO Company Shares of Take-home Ice Cream: % Value 2020-2024 Table 60 - LBN Brand Shares of Take-home Ice Cream: % Value 2021-2024 Table 61 - Distribution of Ice Cream by Format: % Value 2019-2024 Table 62 - Forecast Sales of Ice Cream by Category: Volume 2024-2029 Table 63 - Forecast Sales of Ice Cream by Category: Value 2024-2029 Table 64 - Forecast Sales of Ice Cream by Category: % Volume Growth 2024-2029 Table 65 - Forecast Sales of Ice Cream by Category: % Value Growth 2024-2029

## Savoury Snacks in Brazil

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Rising demand for savoury snacks is driven by affordability Savoury biscuits consolidates popularity, leveraged by health positioning Rapid growth for vegetable chips due to rising number of flexitarians in Brazil

## PROSPECTS AND OPPORTUNITIES

Healthy regional, fusion and authentic flavours to become more sophisticated as part of consumers' expectations Functional snacks promote "hero ingredients" Collaborations and new flavours set to continue surprising consumers and capturing their attention

## CATEGORY DATA

Table 66 - Sales of Savoury Snacks by Category: Volume 2019-2024Table 67 - Sales of Savoury Snacks by Category: Value 2019-2024Table 68 - Sales of Savoury Snacks by Category: % Volume Growth 2019-2024Table 69 - Sales of Savoury Snacks by Category: % Value Growth 2019-2024Table 70 - NBO Company Shares of Savoury Snacks: % Value 2020-2024Table 71 - LBN Brand Shares of Savoury Snacks: % Value 2021-2024Table 72 - Distribution of Savoury Snacks by Format: % Value 2019-2024Table 73 - Forecast Sales of Savoury Snacks by Category: Volume 2024-2029Table 74 - Forecast Sales of Savoury Snacks by Category: Walue 2024-2029Table 75 - Forecast Sales of Savoury Snacks by Category: % Volume Growth 2024-2029Table 76 - Forecast Sales of Savoury Snacks by Category: % Value Growth 2024-2029

## Sweet Biscuits, Snack Bars and Fruit Snacks in Brazil

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Sweet biscuits linked to indulgence and consumed sparingly Boom of protein/energy bars leveraged by the concept of balanced indulgence Rising demand for more economical options from price-sensitive consumers

#### PROSPECTS AND OPPORTUNITIES

Consumer awareness to elevate level of expectations regarding nutritional composition Polarisation expected to reinforce indulgence and cost-benefit purchases "Shrinkflation" leads to new strategies in brand positioning

## CATEGORY DATA

Table 77 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2019-2024 Table 78 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2019-2024 Table 79 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2019-2024 Table 80 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2019-2024 Table 81 - NBO Company Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2020-2024 Table 82 - LBN Brand Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2021-2024 Table 83 - NBO Company Shares of Sweet Biscuits: % Value 2020-2024 Table 84 - LBN Brand Shares of Sweet Biscuits: % Value 2021-2024 Table 85 - NBO Company Shares of Snack Bars: % Value 2020-2024 Table 86 - LBN Brand Shares of Snack Bars: % Value 2021-2024 Table 87 - NBO Company Shares of Fruit Snacks: % Value 2020-2024 Table 88 - LBN Brand Shares of Fruit Snacks: % Value 2021-2024 Table 89 - Distribution of Sweet Biscuits, Snack Bars and Fruit Snacks by Format: % Value 2019-2024 Table 90 - Distribution of Sweet Biscuits by Format: % Value 2019-2024 Table 91 - Distribution of Snack Bars by Format: % Value 2019-2024 Table 92 - Distribution of Fruit Snacks by Format: % Value 2019-2024 Table 93 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2024-2029 Table 94 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2024-2029 Table 95 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2024-2029 Table 96 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks 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 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/snacks-in-brazil/report.