



Euromonitor
International

Fresh Food in Brazil

March 2026

Table of Contents

Fresh Food in Brazil

EXECUTIVE SUMMARY

Cost pressure and clean-eating preferences lift fresh food volumes in Brazil

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Fresh food benefits from cost concerns and shift away from ultra-processed alternatives

Health trends and home-cooking culture drive consumers to fresh food options

Distribution upgrades and rising interest in niche offerings support overall volume growth

WHAT'S NEXT?

Further growth forecast amid continued consumer shift to natural foods

Supply-chain improvements should support expansion

Investment in retail distribution and foodservice set to broaden access

CHANNELS

Neighbourhood stores remain backbone of fresh food supplies

Supermarkets benefit through broad offer and modernisation

MARKET DATA

Table 1 - Total Sales of Fresh Food by Category: Total Volume 2020-2025

Table 2 - Total Sales of Fresh Food by Category: % Total Volume Growth 2020-2025

Table 3 - Retail Sales of Fresh Food by Category: Volume 2020-2025

Table 4 - Retail Sales of Fresh Food by Category: % Volume Growth 2020-2025

Table 5 - Retail Sales of Fresh Food by Category: Value 2020-2025

Table 6 - Retail Sales of Fresh Food by Category: % Value Growth 2020-2025

Table 7 - Retail Sales of Fresh Food by Packaged vs Unpackaged: % Volume 2020-2025

Table 8 - Retail Distribution of Fresh Food by Format: % Volume 2020-2025

Table 9 - Forecast Total Sales of Fresh Food by Category: Total Volume 2025-2030

Table 10 - Forecast Total Sales of Fresh Food by Category: % Total Volume Growth 2025-2030

Table 11 - Forecast Retail Sales of Fresh Food by Category: Volume 2025-2030

Table 12 - Forecast Retail Sales of Fresh Food by Category: % Volume Growth 2025-2030

Table 13 - Forecast Retail Sales of Fresh Food by Category: Value 2025-2030

Table 14 - Forecast Retail Sales of Fresh Food by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

Eggs in Brazil

KEY DATA FINDINGS

2025 DEVELOPMENTS

Eggs gain share as households trade down from higher-cost proteins

INDUSTRY PERFORMANCE

Eggs as favoured animal-sourced protein substitute amid economic stress

Consumers remain laser-focused on affordability, solidifying eggs as a staple

WHAT'S NEXT?

Premiumisation to increasingly differentiate eggs for consumers

Eggs will continue to benefit from health and convenience trends

Summary 2 - Major Processors of Eggs 2025

CATEGORY DATA

- Table 15 - Total Sales of Eggs: Total Volume 2020-2025
- Table 16 - Total Sales of Eggs: % Total Volume Growth 2020-2025
- Table 17 - Retail Sales of Eggs: Volume 2020-2025
- Table 18 - Retail Sales of Eggs: % Volume Growth 2020-2025
- Table 19 - Retail Sales of Eggs: Value 2020-2025
- Table 20 - Retail Sales of Eggs: % Value Growth 2020-2025
- Table 21 - Retail Sales of Eggs by Packaged vs Unpackaged: % Volume 2020-2025
- Table 22 - Forecast Total Sales of Eggs: Total Volume 2025-2030
- Table 23 - Forecast Total Sales of Eggs: % Total Volume Growth 2025-2030
- Table 24 - Forecast Retail Sales of Eggs: Volume 2025-2030
- Table 25 - Forecast Retail Sales of Eggs: % Volume Growth 2025-2030
- Table 26 - Forecast Retail Sales of Eggs: Value 2025-2030
- Table 27 - Forecast Retail Sales of Eggs: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Fish and Seafood in Brazil

KEY DATA FINDINGS

2025 DEVELOPMENTS

Affordable farmed fish drives demand shift in Brazil

INDUSTRY PERFORMANCE

Fish benefits from economic scenario, trending as a lean and healthy protein
Wider offering and distribution of fishes pushes positive perform performance

WHAT'S NEXT?

Fish and seafood expected to expand in Brazil
Increased fish production should push down prices, supporting further growth
Summary 3 - Major Processors of Fish and Seafood 2025

CATEGORY DATA

- Table 28 - Total Sales of Fish and Seafood by Category: Total Volume 2020-2025
- Table 29 - Total Sales of Fish and Seafood by Category: % Total Volume Growth 2020-2025
- Table 30 - Retail Sales of Fish and Seafood by Category: Volume 2020-2025
- Table 31 - Retail Sales of Fish and Seafood by Category: % Volume Growth 2020-2025
- Table 32 - Retail Sales of Fish and Seafood by Category: Value 2020-2025
- Table 33 - Retail Sales of Fish and Seafood by Category: % Value Growth 2020-2025
- Table 34 - Retail Sales of Fish and Seafood by Packaged vs Unpackaged: % Volume 2020-2025
- Table 35 - Forecast Total Sales of Fish and Seafood by Category: Total Volume 2025-2030
- Table 36 - Forecast Total Sales of Fish and Seafood by Category: % Total Volume Growth 2025-2030
- Table 37 - Forecast Retail Sales of Fish and Seafood by Category: Volume 2025-2030
- Table 38 - Forecast Retail Sales of Fish and Seafood by Category: % Volume Growth 2025-2030
- Table 39 - Forecast Retail Sales of Fish and Seafood by Category: Value 2025-2030
- Table 40 - Forecast Retail Sales of Fish and Seafood by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Fruits in Brazil

KEY DATA FINDINGS

2025 DEVELOPMENTS

Berries rise rapidly, but fruits remain non-essential spend for many households

INDUSTRY PERFORMANCE

Low fruit intake and economic pressure undermine progress for fruits

Fruits benefits from healthy trends, but competes against indulgent snacks

WHAT'S NEXT?

Brighter economic outlook and demographic expansion should support category growth

Shifting consumer attitudes as major driver of expansion

Summary 4 - Major Processors of Fruits 2025

CATEGORY DATA

Table 41 - Total Sales of Fruits by Category: Total Volume 2020-2025

Table 42 - Total Sales of Fruits by Category: % Total Volume Growth 2020-2025

Table 43 - Retail Sales of Fruits by Category: Volume 2020-2025

Table 44 - Retail Sales of Fruits by Category: % Volume Growth 2020-2025

Table 45 - Retail Sales of Fruits by Category: Value 2020-2025

Table 46 - Retail Sales of Fruits by Category: % Value Growth 2020-2025

Table 47 - Retail Sales of Fruits by Packaged vs Unpackaged: % Volume 2020-2025

Table 48 - Forecast Total Sales of Fruits by Category: Total Volume 2025-2030

Table 49 - Forecast Total Sales of Fruits by Category: % Total Volume Growth 2025-2030

Table 50 - Forecast Retail Sales of Fruits by Category: Volume 2025-2030

Table 51 - Forecast Retail Sales of Fruits by Category: % Volume Growth 2025-2030

Table 52 - Forecast Retail Sales of Fruits by Category: Value 2025-2030

Table 53 - Forecast Retail Sales of Fruits by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Meat in Brazil](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Price-led gains mask softer meat demand in Brazil

INDUSTRY PERFORMANCE

Inflationary pressures drive prices high but curbs volume growth

Increasing demand for leaner meat aligns with health and wellness trends

WHAT'S NEXT?

Meat volume growth limited by high prices in the forecast period

Premiumisation set to drive market growth in value

Summary 5 - Major Processors of Meat 2025

CATEGORY DATA

Table 54 - Total Sales of Meat by Category: Total Volume 2020-2025

Table 55 - Total Sales of Meat by Category: % Total Volume Growth 2020-2025

Table 56 - Retail Sales of Meat by Category: Volume 2020-2025

Table 57 - Retail Sales of Meat by Category: % Volume Growth 2020-2025

Table 58 - Retail Sales of Meat by Category: Value 2020-2025

Table 59 - Retail Sales of Meat by Category: % Value Growth 2020-2025

Table 60 - Retail Sales of Meat by Packaged vs Unpackaged: % Volume 2020-2025

Table 61 - Forecast Sales of Meat by Category: Total Volume 2025-2030
Table 62 - Forecast Sales of Meat by Category: % Total Volume Growth 2025-2030
Table 63 - Forecast Retail Sales of Meat by Category: Volume 2025-2030
Table 64 - Forecast Retail Sales of Meat by Category: % Volume Growth 2025-2030
Table 65 - Forecast Retail Sales of Meat by Category: Value 2025-2030
Table 66 - Forecast Retail Sales of Meat by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Nuts in Brazil

KEY DATA FINDINGS

2025 DEVELOPMENTS

Premium demand holds up, but high prices cap volumes

INDUSTRY PERFORMANCE

Challenging economics keep nut consumption flat in 2025
Health trends favour nuts, as convenience demand cushions cost impact

WHAT'S NEXT?

Price may impose barrier to stronger growth
Nuts as a nutritious alternative
Summary 6 - Major Processors of Nuts 2025

CATEGORY DATA

Table 67 - Total Sales of Nuts by Category: Total Volume 2020-2025
Table 68 - Total Sales of Nuts by Category: % Total Volume Growth 2020-2025
Table 69 - Retail Sales of Nuts by Category: Volume 2020-2025
Table 70 - Retail Sales of Nuts by Category: % Volume Growth 2020-2025
Table 71 - Retail Sales of Nuts by Category: Value 2020-2025
Table 72 - Retail Sales of Nuts by Category: % Value Growth 2020-2025
Table 73 - Retail Sales of Nuts by Packaged vs Unpackaged: % Volume 2020-2025
Table 74 - Forecast Total Sales of Nuts by Category: Total Volume 2025-2030
Table 75 - Forecast Total Sales of Nuts by Category: % Total Volume Growth 2025-2030
Table 76 - Forecast Retail Sales of Nuts by Category: Volume 2025-2030
Table 77 - Forecast Retail Sales of Nuts by Category: % Volume Growth 2025-2030
Table 78 - Forecast Retail Sales of Nuts by Category: Value 2025-2030
Table 79 - Forecast Retail Sales of Nuts by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Pulses in Brazil

KEY DATA FINDINGS

2025 DEVELOPMENTS

Convenience constraints cap pulse volumes despite lower bean prices

INDUSTRY PERFORMANCE

Low convenience of unprocessed pulses slows volume growth
Pulses' performance in Brazil is culture-based rather than health-driven

WHAT'S NEXT?

Convenience valued over traditional rice and beans combination

Consumption may benefit from rising health concerns in the future

Summary 7 - Major Processors of Pulses 2025

CATEGORY DATA

Table 80 - Total Sales of Pulses by Category: Total Volume 2020-2025

Table 81 - Total Sales of Pulses by Category: % Total Volume Growth 2020-2025

Table 82 - Retail Sales of Pulses by Category: Volume 2020-2025

Table 83 - Retail Sales of Pulses by Category: % Volume Growth 2020-2025

Table 84 - Retail Sales of Pulses by Category: Value 2020-2025

Table 85 - Retail Sales of Pulses by Category: % Value Growth 2020-2025

Table 86 - Retail Sales of Pulses by Packaged vs Unpackaged: % Volume 2020-2025

Table 87 - Forecast Total Sales of Pulses by Category: Total Volume 2025-2030

Table 88 - Forecast Total Sales of Pulses by Category: % Total Volume Growth 2025-2030

Table 89 - Forecast Retail Sales of Pulses by Category: Volume 2025-2030

Table 90 - Forecast Retail Sales of Pulses by Category: % Volume Growth 2025-2030

Table 91 - Forecast Retail Sales of Pulses by Category: Value 2025-2030

Table 92 - Forecast Retail Sales of Pulses by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Starchy Roots in Brazil](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sweet potatoes outperforms as shoppers shift within starchy roots

INDUSTRY PERFORMANCE

Elevated retail prices discourage volume expansion in 2025

Starchy roots benefit from clean label trends

WHAT'S NEXT?

Total volumes likely to increase in line with population and income gains

Greater supply likely to stabilise prices and support expansion in distribution

Summary 8 - Major Processors of Starchy Roots 2025

CATEGORY DATA

Table 93 - Total Sales of Starchy Roots by Category: Total Volume 2020-2025

Table 94 - Total Sales of Starchy Roots by Category: % Total Volume Growth 2020-2025

Table 95 - Retail Sales of Starchy Roots by Category: Volume 2020-2025

Table 96 - Retail Sales of Starchy Roots by Category: % Volume Growth 2020-2025

Table 97 - Retail Sales of Starchy Roots by Category: Value 2020-2025

Table 98 - Retail Sales of Starchy Roots by Category: % Value Growth 2020-2025

Table 99 - Retail Sales of Starchy Roots by Packaged vs Unpackaged: % Volume 2020-2025

Table 100 - Forecast Total Sales of Starchy Roots by Category: Total Volume 2025-2030

Table 101 - Forecast Total Sales of Starchy Roots by Category: % Total Volume Growth 2025-2030

Table 102 - Forecast Retail Sales of Starchy Roots by Category: Volume 2025-2030

Table 103 - Forecast Retail Sales of Starchy Roots by Category: % Volume Growth 2025-2030

Table 104 - Forecast Retail Sales of Starchy Roots by Category: Value 2025-2030

Table 105 - Forecast Retail Sales of Starchy Roots by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Sugar and Sweeteners in Brazil](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Household belt-tightening and health pressure reduce sugar volumes

INDUSTRY PERFORMANCE

Sugar and sweeteners suffers against difficult economic backdrop

Health concerns leave space for low-sugar or no-sugar options

WHAT'S NEXT?

Affordability remains determinant for sugar and sweeteners consumption

Health and nutrition trends reinforce downward pressure on sugar consumption

Summary 9 - Major Processors of Sugar and Sweeteners 2025

CATEGORY DATA

Table 106 - Total Sales of Sugar and Sweeteners: Total Volume 2020-2025

Table 107 - Total Sales of Sugar and Sweeteners: % Total Volume Growth 2020-2025

Table 108 - Retail Sales of Sugar and Sweeteners: Volume 2020-2025

Table 109 - Retail Sales of Sugar and Sweeteners: % Volume Growth 2020-2025

Table 110 - Retail Sales of Sugar and Sweeteners: Value 2020-2025

Table 111 - Retail Sales of Sugar and Sweeteners: % Value Growth 2020-2025

Table 112 - Retail Sales of Sugar and Sweeteners by Packaged vs Unpackaged: % Volume 2020-2025

Table 113 - Forecast Total Sales of Sugar and Sweeteners: Total Volume 2025-2030

Table 114 - Forecast Total Sales of Sugar and Sweeteners: % Total Volume Growth 2025-2030

Table 115 - Forecast Retail Sales of Sugar and Sweeteners: Volume 2025-2030

Table 116 - Forecast Retail Sales of Sugar and Sweeteners: % Volume Growth 2025-2030

Table 117 - Forecast Retail Sales of Sugar and Sweeteners: Value 2025-2030

Table 118 - Forecast Retail Sales of Sugar and Sweeteners: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Vegetables in Brazil](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Staples hold up as shoppers trade down within vegetables

INDUSTRY PERFORMANCE

Demand for basic items stays steady as higher-priced vegetables suffer

Health consciousness and cultural habits support demand for fresh vegetables

WHAT'S NEXT?

Growth supported by health trends and investment in production processes

Economic and regulatory scenarios to push vegetables sales

Summary 10 - Major Processors of Vegetables 2025

CATEGORY DATA

Table 119 - Total Sales of Vegetables by Category: Total Volume 2020-2025

Table 120 - Total Sales of Vegetables by Category: % Total Volume Growth 2020-2025

Table 121 - Retail Sales of Vegetables by Category: Volume 2020-2025

Table 122 - Retail Sales of Vegetables by Category: % Volume Growth 2020-2025

Table 123 - Retail Sales of Vegetables by Category: Value 2020-2025

Table 124 - Retail Sales of Vegetables by Category: % Value Growth 2020-2025

Table 125 - Retail Sales of Vegetables by Packaged vs Unpackaged: % Volume 2020-2025

Table 126 - Forecast Total Sales of Vegetables by Category: Total Volume 2025-2030

Table 127 - Forecast Total Sales of Vegetables by Category: % Total Volume Growth 2025-2030

Table 128 - Forecast Retail Sales of Vegetables by Category: Volume 2025-2030

Table 129 - Forecast Retail Sales of Vegetables by Category: % Volume Growth 2025-2030

Table 130 - Forecast Retail Sales of Vegetables by Category: Value 2025-2030

Table 131 - Forecast Retail Sales of Vegetables by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

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.