



Cooking Ingredients and Meals in Brazil

March 2026

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EXECUTIVE SUMMARY

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

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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

Health and lifestyle trends are set to reinforce premium demand

Innovation and supply investment are expected to drive premiumisation across the forecast period

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Bunge sustains its leadership through scale, integration and brand strength

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Health and wellness trends are expected to drive innovation in Brazil's ready meals and soups

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