



Processed Meat, Seafood and Alternatives To Meat in Brazil

March 2026

Processed Meat, Seafood and Alternatives To Meat in Brazil - Category analysis

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

BRF leads through innovation and broad distribution

Leading player leverages Sadia for health positioning

CHANNELS

Popularity of category products amid economic pressure boosts warehouse clubs

Supermarkets and hypermarkets lose out to warehouse clubs

CATEGORY DATA

Table 1 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

Table 2 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

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Staple Foods in Brazil - Industry Overview

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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