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Report Highlights:

Brazil presents growth potential for consumer oriented products, especially among the 40 million high-income consumers who are open to new, quality imports, while the country's robust food processing sector offers significant prospects for inputs of U.S. commodities and ingredients. With a recovering economy and increasing household purchasing power, Brazil is seeing a rising demand for premium, health-conscious, and value-added food products. Trends such as natural ingredients, transparency in sourcing, functional benefits, and premium branding are reshaping consumer expectations and influencing product development. U.S. exports to Brazil grew 29% in 2024, led by dairy, tree nuts, and distilled spirits. Trade shows like Anuga Select Brazil offer U.S. companies valuable exposure to these evolving trends and a direct path to connect with Brazilian buyers.

FAS Exporter Guide

Executive Summary

Brazil is the largest economy in Latin America and the 10th largest in the world. In 2024, Brazil's gross domestic product (GDP) increased 3.4 percent year-over-year. Although the Brazilian agricultural industry competes with the U.S. in many areas, the U.S. ingredients can support the robust food processing industry in Brazil.

Consumer-Oriented Agricultural Imports

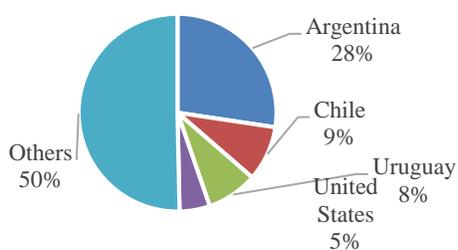


Chart 1: Top Exporting Country to Brazil
Source: Trade Data Monitor (TDM)

Food Retail Industry

The Brazilian Supermarket Association (ABRAS) reported supermarket revenues at US\$195 billion in 2024. The retail sector includes 424,120 stores and serves 30 million consumers daily. The Southeastern region of Brazil has the largest share of the retail industry, with 61 percent of revenues and 6,809 stores.

Food Processing Industry

According to the Brazilian Food Processors' Association (ABIA), the country's food processing sector registered revenues of US\$233 billion in 2024, an increase of 9.9 percent compared to 2023.

Food Service Industry

Brazil is among the five largest foodservice markets in the world, characterized by high fragmentation, with many small and medium-sized businesses. According to the Brazilian

Bars and Restaurants Association (ABRASEL), the sector revenues were \$83 billion in 2024.

Quick Facts CY 2025

Imports of Consumer-Oriented Products by Brazil: US\$ 6,730 million

Top 10 Imported Growth Products in 2024

- | | |
|-----------------------|---------------|
| 1) Juices | 6) Condiments |
| 2) Fresh Vegetables | 7) Tree Nuts |
| 3) Fresh Fruit | 8) Enzymes |
| 4) Chocolate Products | 9) Wine |
| 5) Proc. Vegetables | 10) Candies |

Source: SECEX

Food Industry by Channels (U.S. Billion \$) in 2024

Retail Food Industry	\$195
Food Service	\$83
Food Processing	\$170
Food Export	\$148

Source: ABIA and TDM

Top 10 Brazilian Retailers in 2024

1) Carrefour	6) Irmãos Muffato
2) Assai Atacadista	7) Grupo Pereira
3) Grupo Mateus	8) Cencosud Brasil
4) Grupo Pão de Açúcar	9) Mat Minas &
5) Supermercados BH	10) Grupo Koch

Source: ABRAS

Population (millions): 212

GDP (trillion USD): 2.13

GDP per capita (USD): 10,103

Exchange rate (Avg 12-month): US\$1/R\$5.468

Source: Brazilian Institute of Geography and Statistics

Strengths/Weakness/Opportunities/Threats

Strengths	Weakness
The United States is seen as supplier of high-quality ingredients	Unique labeling requirements
Opportunities	Threats
Strong consumer demand for premium products.	Strong competition from European countries

Section I: Market Overview

In 2024, Brazil's gross domestic product (GDP) reached US\$2.13 trillion, growing by 3.4 percent over the previous year. Brazil is a geographically large country with Latin America's largest consumer base. Exporters should consider long-term investment in market development which can capitalize on the nation's resources and demographic advantages to meet the demands of an emerging economy within a relatively stable macroeconomic environment.

Brazil's vast geography, large population, and abundant natural resources make it one of the world's most important agricultural producers and exporters. In calendar year (CY) 2024, Brazil imported \$16.5 billion of agricultural products and exported \$148.7 billion. The United States is the fifth leading supplier of agricultural products to Brazil. In CY24, the United States exported \$892 million of agricultural and related products to Brazil, led by dairy products and wheat. U.S. exports grew by 29 percent in CY24, as imports of wheat, essential oils and tree nuts had grown significantly.

According to the Brazilian Food Processors' Association (ABIA), Brazil's food processing sector reached revenues of R\$233 billion in 2024, an increase of 9.9 percent over the previous year, representing 10.8 percent of the country's GDP. Exports of processed foods climbed to a record US\$66.3 billion—6.6 percent above 2023—driven by expanding global demand and the opening of new markets. Despite rising production costs, fueled by higher commodity prices, energy expenses, and adverse weather conditions, ABIA remains optimistic about the sector's resilience, citing ongoing investments in innovation, sustainability, and facility modernization as key drivers for continued growth both domestically and abroad.

Table 2: Advantages and Challenges

ADVANTAGES	CHALLENGES
Retailers offer foreign goods to differentiate themselves from competitors, develop new niche markets, and gain high-end consumers' attention.	Imported products fall in the luxury goods category; however, consumers are still searching for products that provide them with value for their money.
Price is not always the determining factor for high-end consumers.	High-end consumers are demanding regarding product innovation, packaging, status, and trends.
Brazilian importers are frequently searching for new-to-market products.	Retailers and distributors when importing new-to-market products often start with smaller orders.
The U.S. food industry can respond to consumer demand promptly, regardless of the segment of products.	Exclusive contracts are common for Brazilian companies.

Source: FAS/Sao Paulo

The [Food Processing Ingredients GAIN Report](#), [Food Service - HRI GAIN Report](#) and the [Food Retail Industry GAIN Report](#) provide further data and analysis on Brazilian food trends.

Section II. Exporter Business Tips

Market Research

The Agricultural Trade Office (ATO) serves as the main resource for U.S. exporters interested in Brazil's market. The ATO provides market testing opportunities through promotional activities and offers valuable market intelligence services to companies. U.S. exporters are encouraged to leverage State and Regional Trade Groups as well as trade association and cooperator programs. Additionally, the ATO advises exporters to establish direct connections with potential Brazilian buyers, who can provide crucial insights on product viability, market dimensions, pricing strategies, distribution channels, and effective marketing approaches.

Local Business Customs and Trends

Brazil's food industry is highly developed and competitive, dominated by major multinational companies. U.S. food products typically cannot compete on price with domestic Brazilian goods or products from Mercosul countries due to exchange rates and import tariffs, positioning American imports as premium products in the Brazilian market.

For U.S. companies, trade shows in Brazil offer a valuable opportunity not only to enter the market but also to observe these evolving consumer behaviors. Events like Anuga Select Brazil, a USDA-endorsed show in 2024, provides an ideal platform for showcasing U.S. products, building connections, and identifying consumer trends.

General Consumer Tastes and Trends

In urban centers like São Paulo and across Brazil's Southeast region, a growing number of consumers live in compact apartments—often no larger than 30 square meters—which is shaping new grocery shopping habits. These consumers increasingly rely on small-format neighborhood stores for daily or frequent purchases. This trend reflects a shift toward convenience, proximity, and smaller sizes, driven by space constraints at home and fast-paced urban lifestyles.

Manufacturers are expanding their portfolios to include products with health-focused benefits. Consumer demand is driving two major labeling trends: "clean labels"—highlighting natural, organic, and gluten-free claims—and "clear labels", which emphasize transparency about ingredients and sourcing. In Brazil, packaging plays a key role in conveying product sophistication, making it a strategic asset for positioning premium U.S. products.

One segment reflecting these trends is processed vegetables—including potatoes, olives, and mixed vegetables—whose imports totaled \$894 million in 2024. Potatoes and olives led growth, rising 49% and 14%, respectively. This surge highlights a broader shift in consumer behavior, as Brazilian

households increasingly adopt frozen vegetables as part of their daily routines. Convenience, extended shelf life, and health benefits are key drivers, particularly among urban consumers seeking nutritious, ready-to-use options that suit modern lifestyles.

Brazil is home to more than 40 million high-earning potential consumers—a number larger than the entire population of many other Latin American countries. Within this group, there is a large population of wealthy consumers, roughly 10 million people, representing the segment that is least sensitive to price and highly receptive to premium U.S. food and beverage products. São Paulo, the country’s economic powerhouse, accounts for approximately 30 percent of national GDP and serves as the primary entry point for multinational companies and retailers, who often establish operations there before expanding into other regions.

Table 3: Trade Show Schedule

Show Name	Show Date	Products Featured
Anuga Brazil	April 7-9, 2026	Consumer-Oriented Products
APAS Show	May 18-21, 2026	Consumer-Oriented Products
Food Ingredients South America	August 26-28, 2025	Ingredients and Additives
Nutri Ingredients Summit	April 31- May 1, 2026	Ingredients and Additives
PET South America	August 13-15, 2025	Pet Food
Victam Latam	16-18 September, 2025	Feed Ingredients

Source: FAS/Sao Paulo

Section III. Import Food Standards & Regulations and Import Procedures

A. Customs Clearance

The import process has three major phases: pre-shipment, shipment, and customs clearance. The number of required procedures within each phase may vary, depending on the product category. To fulfill local requirements, the exporter must work with the importer, particularly in the initial stage, when the documents for shipment are prepared. The Ministry of Agriculture and Livestock (MAPA) and the National Agency of Sanitary Surveillance (ANVISA) share responsibility for imported food and beverages, ensuring the safety of the food supply, and enforcing regulations related to agricultural goods throughout the supply chain.

Table 4: Brazilian Government Regulators of Agricultural Goods

MAPA	ANVISA
<u>Consumer-Oriented Products</u> <ul style="list-style-type: none"> Animal products: red meat and by-products; poultry meat and by-products; fish; seafood products; dairy products; eggs; and honey Beverages: alcoholic and non-alcoholic 	<u>Consumer-Oriented Products</u> <ul style="list-style-type: none"> Food: all consumer-ready or processed products (except those under MAPA’s authority) Beverages: energy drinks; non-dairy beverages such as soy, almond, etc.

(except energy drinks, non-dairy beverages such as soy, almond, etc.)	
<ul style="list-style-type: none"> • Fruits and vegetables: dried and fresh • Margarine 	
<u>Intermediate Products</u> <ul style="list-style-type: none"> • Wheat flour, planting seeds • Vegetable oils (soy, cotton, canola, corn, sunflowers) 	<u>Intermediate Products</u> <ul style="list-style-type: none"> • Sugar, sweeteners, mineral water, flavored waters, additives, and other ingredients (excluding those under MAPA’s authority) • Oils (excluding those under MAPA’s authority)
<u>Bulk Commodities</u> <ul style="list-style-type: none"> • Wheat, grains, rice, soybean, cotton, tobacco, pulses, peanuts, flour 	
<u>Others</u> <ul style="list-style-type: none"> • Pet food, feeds, and fodders • Plants and seeds • Animals, semen, and embryos 	

Source: FAS/Sao Paulo

Please refer to the [2024 FAIRS Report](#), which outlines specific regulations or contact the ATO Sao Paulo at ATOSaoPaulo@usda.gov if you need any assistance.

Section IV. Market Sector Structure and Trends

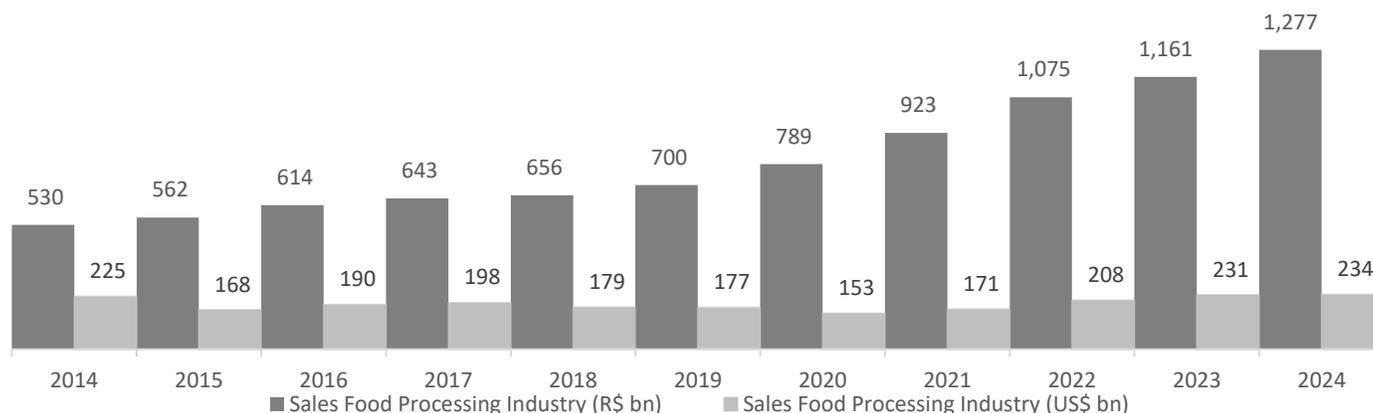
Within the various food distribution formats, imports of agricultural goods may occur directly or indirectly. Volume is the determining factor for all operators. If the volume is not significant, retailers, food service operators, and the food processing industry typically prefer to purchase imported products locally from distributors. In general, distributors require exporters to sign exclusive or semi-exclusive contracts, which may impose geographic or product line restrictions. Brazilian importers also tend to be risk-averse, starting with small trial purchases—often just a few pallets—and expanding only after market acceptance is proven.

This preference for small initial volumes presents a challenge for U.S. exporters, who often hesitate to serve the Brazilian market under such conditions. To address this, many Brazilian importers rely on consolidators—specialized companies that manage label translation, regulatory compliance, logistics, and small-scale shipments. This model allows U.S. suppliers to access the market without the burden of adapting to local operational complexities, while meeting the needs of initially cautious buyers.

Food Processing Sector

According to the Brazilian Food Processors’ Association (ABIA), Brazil’s food processing sector reached revenues of \$233 billion in 2024, a nominal increase of 9.9% over the previous year, representing 10.8% of the country’s GDP. Brazil's food industry continues to align with global trends, investing in the development of innovative, high-value products to meet evolving consumer demands.

Figure 1: Food Processing Industry Sales



Source: ABIA

Food Retail Sector

The Brazilian retail sector is the most critical channel in the food distribution system. The industry is well-integrated, dynamic, and sophisticated. According to the Brazilian Supermarket Association (ABRAS), the retail sector accounted for R\$1.067 trillion (approximately US\$195 billion) in 2024, representing 9 percent of the country's GDP. This includes a wide range of formats such as neighborhood stores, supermarkets, hypermarkets, cash-and-carry outlets, and e-commerce. The sector employs around 9 million people and serves 30 million consumers daily. As innovation continues to drive the market, many retailers are importing directly to meet growing demand for high-quality products. This growing sophistication, however, coexists with a fragmented retail landscape. Regional producers supply distinct products across Brazil's diverse market, and consumer preferences often vary by location.

Table 5: Top 10 Brazilian Retailers (2023)

Company	Headquarters	Sales Billion (USD)	Share* (%)	Number of Stores
Carrefour	São Paulo	20.8	25%	1,188
Assai	São Paulo	13.0	16%	288
Grupo Mateus	Maranhão	5.4	7%	258
Grupo Pão de Açúcar	São Paulo	3.7	5%	695
Supermercados BH	Minas Gerais	3.1	4%	307
Grupo Muffato	Paraná	2.8	4%	104
Grupo Pereira/SDB	São Paulo	2.3	3%	87
Cencosud	São Paulo	2.0	3%	234
Mart Minas	Minas Gerais	1.7	2%	81

Koch Hipermercado

Santa Catarina

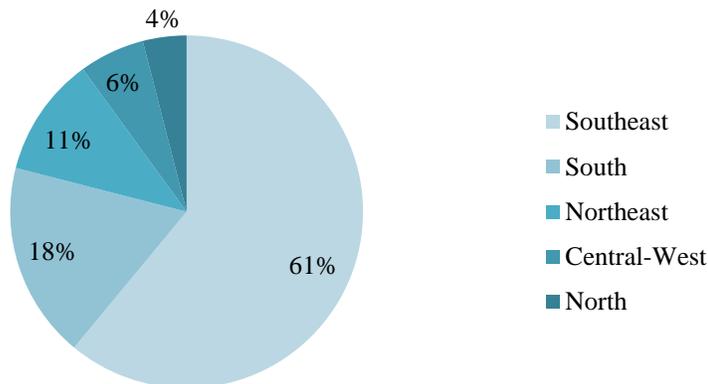
1.4

2%

64

Source: ABRAS

Figure 2: 2023 Retail Revenues by Region (%)



Source: ABRAS

Food Service Sector

According to ABRASEL, the sector reached R\$455 billion (\$83 billion) in revenue in 2024, up 10% from the previous year, and represents 3.6% of Brazil's GDP. According to Euromonitor, small to medium independent operators dominate the Brazilian market with 97.5% of outlets while chains comprise 2.5%. The foodservice sector in Brazil is projected to grow 7% per year until 2028, according to a survey undertaken by Redirection International, a firm specializing in Mergers and Acquisitions (M&A). Please refer to [Food Service - HRI GAIN Report](#) for more information.

Section V. Agricultural and Food Imports

Despite consistent exchange rate volatility, Brazil has maintained its position as a major importer of agricultural products from the world and the largest importer in South America and presents opportunities for U.S. exporters (Table 5). In 2024, Brazil's imports of consumer-oriented food products amounted to US\$6.7 billion, increasing approximately 15 percent over the previous year (Table 6 and 7).

Brazil's major partners in the consumer-oriented products segment are Argentina, Chile, Uruguay, Chile, the United States, and Italy. Mercosul members and Chile benefit from the free trade agreement, which make them an important agricultural trade partner of Brazil. The United States and European countries offer products with similar quality and standards; however, sales of consumer-oriented products from European to Brazil are consistently higher. The proposed Mercosul-EU trade agreement

poses a potential threat to U.S. exports, as it would reduce tariffs and further facilitate access for European food and beverage products.

Table 5: Best High Value Consumer-Oriented Product Prospects (US\$ Million)

Product Category	Brazil World Import in 2024	Brazil Imports from the U.S. in 2024	U.S. Market Share
Dairy Products	1,389	101	7%
Distilled Spirits	285	44	15%
Tree Nuts	197	41	21%
Food Preparation	412	32	8%
Tea	10	2	15%
Wheat	1,638	97	6%

Source: Trade Data Monitor (TDM)

Table 6: Brazil Imports of Consumer-Oriented Products by Country (US\$ Million)

Partner Country	2021	%	2022	%	2023	%	2024	%
World	4,337	100%	5,183	100%	5,826	100%	6,730	100%
Mercosul ¹	1,586	37%	2,017	39%	2,309	40%	2,636	39%
EU 28 ²	1,391	32%	1,582	31%	1,798	31%	1,934	29%
Chile	364	8%	444	9%	448	8%	606	9%
United States	212	5%	278	5%	299	5%	334	5%
China	221	5%	216	4%	214	4%	314	5%
Others	564	13%	646	12%	758	13%	905	13%

Note: ¹ Mercosul (3): Argentina, Uruguay, and Paraguay; ² EU (28+): Austria, Belgium, Bulgaria, Croatia, Republic of Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, and Sweden (+ United Kingdom)

Source: Trade Data Monitor (TDM)

Table 7: Brazil Imports of Agricultural Products in 2024 (US\$ Million)

	World Imports	U.S. Imports	U.S. Share
Consumer-Oriented Products			
Dairy Products	1,389,553	101,968	7%
Eggs & Products	60,672	46,151	76%
Distilled Spirits	285,171	44,310	16%
Tree Nuts	197,637	41,492	21%
Soup & Other Food Preparations	416,360	32,066	8%
Processed Vegetables	894,467	12,887	1%

Meat Products NESOI	185,194	10,637	6%
Condiments & Sauces	68,658	10,532	15%
Chocolate & Cocoa Products	344,890	7,431	2%
Dog & Cat Food	20,089	5,948	30%
Agricultural Related Products			
Seafood Products	1,615,438	7,018	0.40%
Intermediate Products			
Essential Oils	236,612	85,894	36%
Other Intermediate Products	347,019	69,548	20%
Feeds & Fodders	393,594	62,480	16%
Bulk			
Wheat	1,638,459	97,213	6%
Cotton	4,415	3,992	90%
Pulses	65,294	2,837	4%

Source: Trade Data Monitor (TDM)

Section VI. Contacts And Further Information

Agricultural Trade Office (ATO)

U.S. Consulate General
Rua Thomas Deloney, 381
04709-110 São Paulo, SP
Tel: (55-11) 3250-5400
E-mail: atosaopaulo@usda.gov
Website: www.usdabrazil.org.br

Office of Agricultural Affairs (OAA)

U.S. Embassy
Av. das Nacoes, quadra 801, lote 3
70403-900 Brasilia, DF
Tel: (55-61) 3312-7000
E-mail: agbrasil@usda.gov

Attachments:

No Attachments