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Report Highlights:

In 2023, Brazilian foodservice industry revenues reached US\$ 96 billion, an increase of 12 percent compared to 2022. Brazilian imports of consumer-oriented products grew 14 percent in 2023, ending the year at US\$ 5.8 billion. The foodservice sector has mostly recovered from the pandemic, but some uncertainty remains for bars and restaurants due to shifting consumer trends. The Agricultural Trade Office in Sao Paulo will host a USA pavilion at the USDA-endorsed Anuga Select trade show from April 08-10, 2025 to promote U.S. food and beverages. Contact our office at atosaopaulo@usda.gov for more information.

MARKET FACT SHEET

Executive Summary

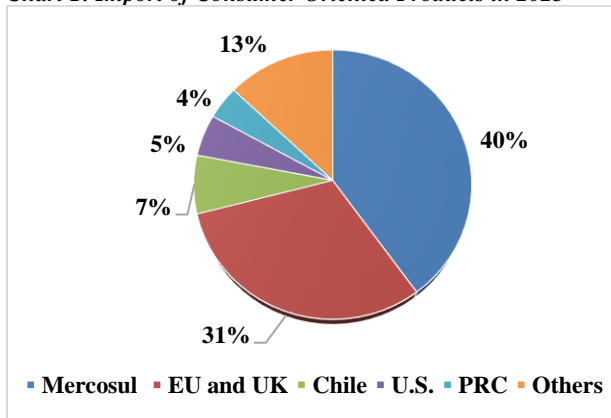
The Brazilian economy expanded 2.9% in 2023, reaching US\$1.96 trillion. With measures related to COVID-19 phased out and higher global demand, Brazil has experienced economic growth. By the end of 2023, inflation in Brazil was 4.62%, within the government's official target (up to 4.75%).

Imports of Consumer-Oriented Products

In 2023, imports of consumer-oriented products by Brazil reached US\$ 5.8 billion, a 14% increase compared to the previous year. The United States was the 5th largest supplier, with a 5.1% market share. The European Union (EU) and the United Kingdom (UK), direct competitors to the United States, maintained a 31% market share.

The United States, the EU and the UK are positioned at a higher price level and offer products with similar quality and standards; therefore, it is plausible that U.S. companies have considerable room to grow in the Brazilian market.

Chart 1: Import of Consumer Oriented Products in 2023



Source: Trade Data Monitor/Secex

*EU 28 includes the UK

Food Processing Industry

According to the Brazilian Food Processors Association (ABIA), the revenues of Brazil's food processing sector reached US\$ 231 billion in 2023, an increase of 7.2% compared to 2022. The result represents 10.8% of the national GDP. The sector comprises over 38,000 companies, most of which are small and medium-sized enterprises.

Food Retail Industry

The Brazilian Supermarket Association (ABRAS) reported supermarket revenues at US\$183 billion in 2023. The retail sector includes 414,663 stores and serves 30 million consumers daily. The Southeastern region of Brazil has the largest share of the retail industry, with 61% of revenues and 6,809 stores. The second largest region is the South with 18% of the market and 2,102 stores.

Food Service Industry

Brazil's food service revenues in 2023 were estimated at R\$ 580 billion (US\$ 96 billion), a 12% growth compared to 2022. sales reached \$billion in 2023.

The food service sector in Brazil is projected to grow 7% per year until 2028. Brazil is among the five largest foodservice markets in the world, characterized by high fragmentation, with many small and medium-sized businesses.

Quick Facts Calendar Year 2023

Imports of Consumer-Oriented Products by Brazil (US\$ billion): \$ 5.8 billion

List of Top 10 Growth Segments in Brazil in 2023

1. Dairy Products	6. Soup & Other food prep.
2. Processed Vegetables	7. Distilled Spirits
3. Wine & related	8. Chocolate & Cocoa products
4. Fresh Fruit	9. Non-Alcoholic beverages (eg.: juices; tea; coffee)
5. Beef & Beef Products	10. Fresh Vegetables

Source: Trade Date Monitor (TDM)

Food Industry Revenues by Channels (U.S. billion)

Retail Food Industry	\$ 183 billion
Food Service-HRI	\$ 96 billion
Food Processing	\$ 231 billion

Top 10 Host Country Retailers in 2023

1. Carrefour	6. Grupo Muffato
2. Assai	7. Grupo Pereira/SDB
3. Grupo Mateus	8. Cencosud
4. Grupo Pao de Açúcar	9. Mart Minas/DOM
5. Supermercados BH	10. Koch Hipermercado

Source: Brazilian Supermarket Association (ABRAS)

GDP/Population

Population (million): 212

GDP (trillion USD): 2

GDP per capita (USD): 9,200

Source: Brazilian Geography and Statistics Institute (IBGE)

Strengths/ Weaknesses/ Opportunities/Threats

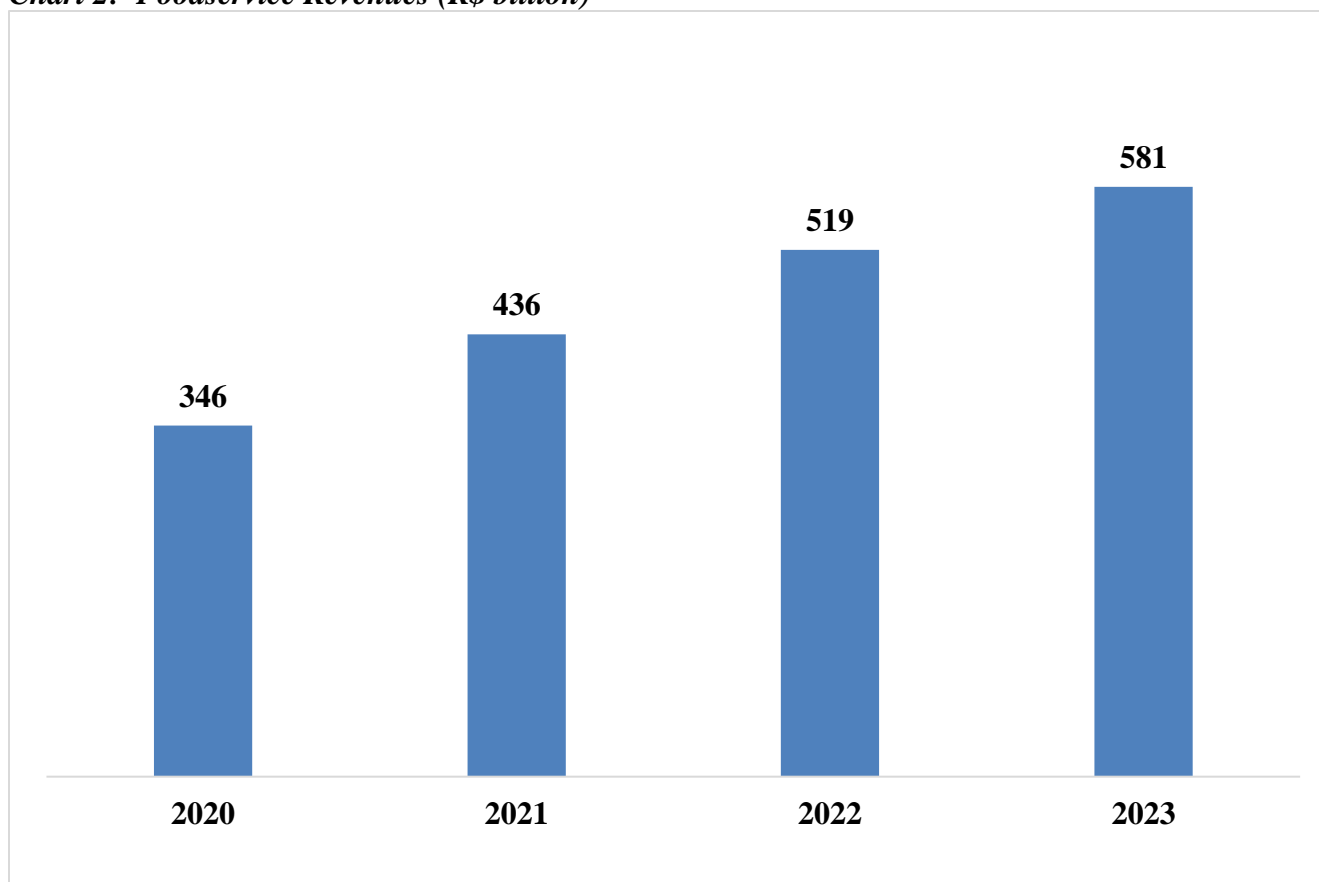
Strengths	Weaknesses
The United States is a trendsetter and known as a provider of high-quality products	The United States has higher costs compared to competitors
Local HRI will consume high-end products	Recent devaluation of Brazilian real has caused import prices to soar
Opportunities	Threats
Brazil has a large population and 14 percent of households make over US\$ 55,000/year	Large local food & beverage industry competes with international suppliers
Retail, HRI, and Food Processing sectors are growing	Strong presence of Europeans products and a strong cultural links with EU countries

SECTION I. MARKET SUMMARY

In 2023, Brazil had mostly recovered from the economic impacts of the COVID-19 pandemic, with gross domestic product (GDP) expanding to approximately US\$ 2 trillion, an increase of 2.9% compared to 2022. The economy benefited from more robust domestic and global demand and record-high commodity prices. Household consumption increased by 3.1% compared to the previous year, driven by lower unemployment and inflation, in addition to the government's cash transfer programs (e.g.: Family Allowance- *Bolsa Família*). Brazil's inflation at the end of 2023 was 4.6%, within the government's target of up to 4.75% and 1.15 points below the previous year.

According to the Brazilian Food Processors' Association (ABIA), food service sector revenues in 2023 were estimated at R\$ 580 billion (US\$ 96 billion), a 12% growth compared to 2022.

Chart 2: Foodservice Revenues (R\$ billion)



Source: ABIA

According to the Brazilian Bars and Restaurants Association (ABRASEL), the bar and restaurant sector represents 3.6% of Brazil's GDP and almost 5 million jobs, corresponding to 8% of all formal jobs in Brazil. For every R\$1,000 (approximately US\$ 170) spent in bars and restaurants, R\$3,650 (approximately US\$ 600) is injected into the economy.

While there has been a rise in the number of food service establishments between 2021-23, full recovery from pandemic-era bankruptcies is still ongoing (Table 1).

Table 1: Foodservice by Location

	Number of Outlets			Growth 22/23 (%)
	2021	2022	2023	
Standalone	836,956	868,766	872,062	0.38
Leisure	15,033	15,737	15,956	1.39
Retail	37,233	39,033	40,673	4.20
Lodging	21,404	22,469	22,943	2.11
Travel	84,920	89,351	91,253	2.13
Total	995,546	1,035,356	1,042,887	0.73

Source: Euromonitor

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). Brazil is among the five largest foodservice markets in the world, characterized by high fragmentation, with many small and medium-sized businesses. Currently, the 10 largest restaurant chains represent only 10% to 12% of the Brazilian market, while in developed countries, such as the U.S., this number reaches 30%.

Small to medium independent operators dominate the Brazilian market with 97.5% of outlets while chains comprise 2.5% (table 2).

Table 2: Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2023

Type	Independent	Chained	Total
<i>Consumer Foodservice by Type</i>	1,017,872	25,015	1,042,887
<i>Cafés/Bars</i>	321,011	2,440	323,451
<i>Full-Service Restaurants</i>	62,353	1,206	63,559
<i>Limited-Service Restaurants</i>	156,616	16,326	172,942
<i>Self-Service Cafeterias</i>	20,473	389	20,862
<i>Street Stalls/Kiosks</i>	457,419	4,654	462,073

Source: Euromonitor

The COVID-19 pandemic shifted the bar and restaurant sector toward home delivery and takeaway services, and this trend has remained prominent. According to the Brazilian Association of Bars and Restaurants (Abrasel), the food delivery sector grew 7.5% to 8% in 2023 compared to the previous year, reaching a market value of R\$ 38 billion (approximately US\$ 6.3 billion). The number of orders increased by 10%, with an average of 2 orders per month per person, indicating a significant shift in consumption habits.

Another major trend in Brazil is a “phygital” experience that integrates the physical and digital/online and offline experiences. This includes hybrid restaurant models, kiosks, automation, interactive menus, and live chats with specialists before placing an order. In addition, with people working in a hybrid model, demand has continued for multipurpose spaces where consumers can work, hold meetings, have lunch, and access cafes and snacks throughout the day.

Table 3: Advantages and Challenges in the Brazilian Foodservice Market

Advantages	Challenges
According to Post’s calculations, in 2023, Brazilian consumers spent approximately 48% of their food budget eating outside of the home.	There is a need to build U.S. brand recognition among high-end consumers, as most consumers prefer European products due to historical linkages.
Brazilian HRI operators are open to products that help improve efficiency, such as pre-prepared items.	Brazilian importers tend to buy small quantities to test the market.
The United States is known as a supplier of high quality-products and as a reliable negotiator.	Due to devaluation of the Brazilian currency (real), imported goods have become more expensive.
HRI operators offer foreign goods to differentiate themselves from competitors, develop new niche markets, and gain awareness among high-end consumers.	Overall purchasing power decreased after the pandemic.
Large U.S. companies, such as Taco Bell, TGI Friday’s, and Olive Garden, are present in the Brazilian market, creating opportunities for U.S. ingredient suppliers.	Brazilian bureaucracy and importing procedures are complex.

SECTION 2. ROADMAP FOR MARKET ENTRY

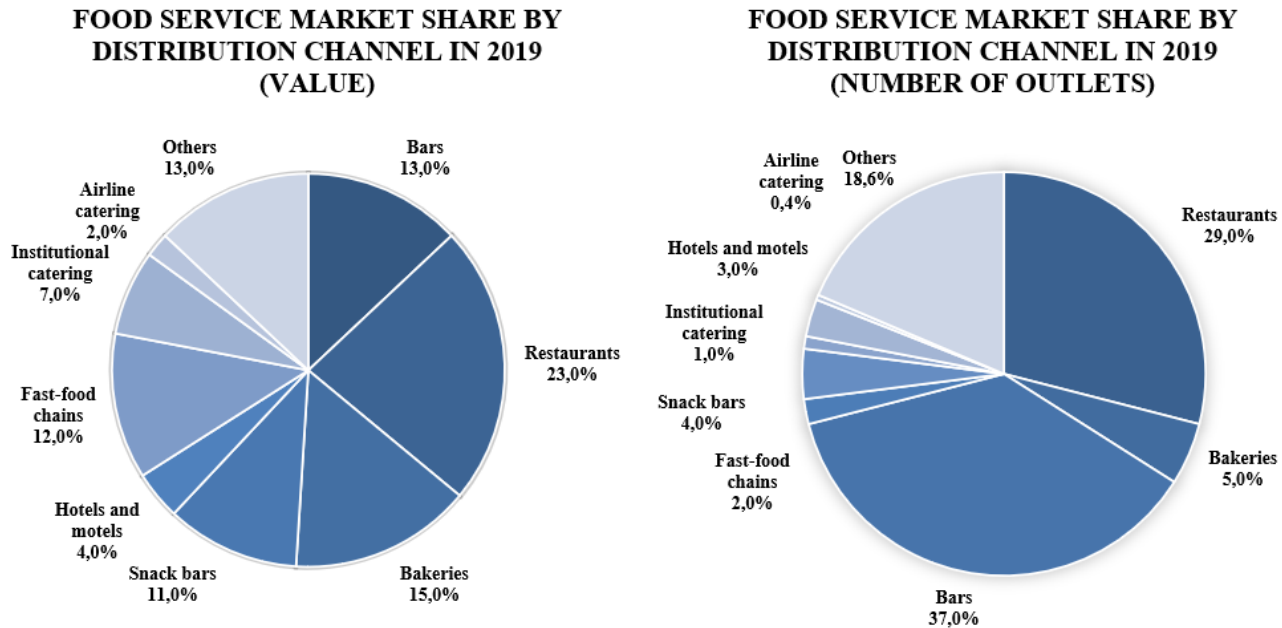
A. Market Entry

The Agricultural Trade Office (ATO) is a primary source of information and market guidance for U.S. companies and maintains direct contact with industry to promote market entry. Exporters can also test the market through ATO-sponsored marketing activities. [Anuga Select](#) is the largest consumer-oriented products trade show in Brazil and USDA will host a USA Pavilion at the upcoming show from April 8-10, 2025.

State Regional Trade Groups and USDA Cooperators are in constant contact with the ATO and are valuable partners when approaching the market. For further information regarding the Brazilian market and regulations related to food and beverage products, please refer to [2023 Exporter Guide](#) and [2023 FAIRS Report](#).

B. Market Structure

Chart 3: *Foodservice Market Share by Distribution Channel*



Source: ABIA

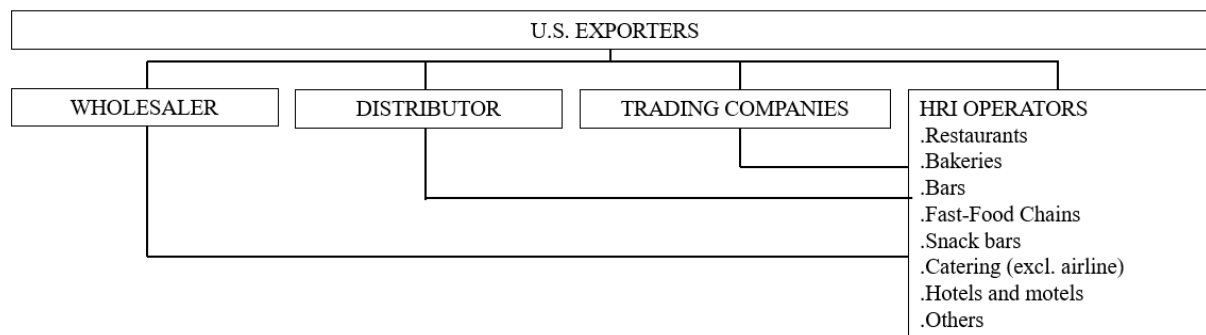
Large processing companies have the necessary logistic structure to supply small and medium-sized companies throughout Brazil. Still, wholesalers are generally the most viable option for suppliers to reach the majority of small and medium-sized foodservice operators. There are buyers willing to import directly; however, restaurants, bars, bakeries, snack bars, and hotels/motels tend to purchase imported products solely through wholesalers and distributors. Fast-food chains and catering companies are more inclined to import directly.

Brazilian companies typically import small volumes, especially when testing new products. Volume is the determining factor for a direct import operation. If the HRI buyer cannot justify the logistics and bureaucracy, then wholesalers, distributors, and trading companies step in. In Brazil, very few distributors of imported foods specialize in the HRI sector. The companies that provide such services are the ones that manage imports of products for large fast-food chains, such as McDonald's, Burger King, and KFC.

C. Distribution

Distributors and trading companies generally do not focus on exclusive niches, retailers, or food service operators. For example, if the product is an ingredient, the local distributor and trading company will target both the food processing and food service industries.

Figure 1: HRI Sector Distribution Flow for Imported Food



Source: ATO Sao Paulo

D. Sub-Sector Profiles – International Hotels and Resorts in Brazil

Table 4: Major Hotel Chains, 2023

Rank	Hotel Chains	Number of Rooms	Number of Hotels
1	Accor	56,179	338
2	Ameris	18,833	301
3	Choice	13,029	73
4	Atlântica	11,640	72
5	Nacional Inn	7,679	71
6	Intercity	6,960	43
7	Wyndham	6,352	33
8	Windsor	4,520	17
9	Bourbon	4,311	21
10	Slaviero	4,249	35

Source: Source: JLL’s Hotels & Hospitality Group

Main Restaurants/Fast Foods Chains in Brazil

Table 5: Major Restaurants/Fast Foods Chains, 2023

Rank	Restaurant Chains	Revenues in billions (BRL)	Number of Outlets
1	McDonald's	8.2	1,130
2	Burger King	5.2	1,039
3	Outback Steakhouse	3.0	173
4	Habib's	2.4	600
5	Madero	2.3	276
6	Graal	2.1	61
7	Coco Bambu	1.7	71
8	Subway	1.5	1,574
9	Giraffas	0.9	409
10	Domino's Pizza	0.6	330

Source: [Brazilian Retail and Consumption Society - SBVC](#)

SECTION III. COMPETITION

Despite being the largest economy in Latin America, Brazil is still relatively closed, with few exporters operating in the consumer-oriented products category. Nevertheless, due to its size, Brazil is the world's 22nd-largest importer of consumer-oriented products.

From 2018-2023, imports of consumer-oriented products grew by approximately 40% despite the strong depreciation of the Brazilian currency. In 2023, Brazil's imports of consumer-oriented products reached US\$ 5.8 billion, an increase of 12% over the previous year. Mercosul has continually captured the majority of market share, followed by the EU, Chile, and China, with the United States at 5-6% (Table 5).

Imported consumer-oriented products in Brazil are considered luxury goods, and consumers seek high-end and exclusive attributes. While Brazilian consumers perceive U.S. imports as high quality, they prefer European products due to their strong association with premium characteristics and Brazilians' robust cultural ties to European countries.

Despite these challenges, Brazil still presents good opportunities for U.S. exporters, especially in the sophisticated niche markets of the country's Southeast region. In this region, many supermarket chains and HRI operators are investing in more upscale establishments to cater to affluent consumers; however, the supply of imported products is still limited outside of major cities.

Table 5: Imports of Consumer-Oriented Products by Brazil (US\$ Million)

	2018	%	2019	%	2020	%	2021	%	2022	%	2023	%
World	4,213	100	4,245	100	4,063	100	4,337	100	5,183	100	5,825	100
Mercosul (3)	1,489	35	1,508	36	1,493	37	1,585	37	2,016	39	2,308	40
EU (28)	1,283	30	1,322	31	1,207	30	1,391	32	1,581	31	1,798	31
Chile	382	9	347	8	373	9	364	8	444	9	448	7
United States	250	6	244	6	219	5	212	5	215	4	298	5
PRC	233	6	251	6	278	7	221	5	278	5	214	4
Others	577	14	572	13	493	12	563	13	649	12	756	13

Source: Trade Data Monitor (TDM) based on the Brazilian Secretariat of Foreign Trade (SECEX).

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

SECTION IV. CATEGORIES WITH BEST PROSPECT

Considering imported food products incur premium prices, exporters should consider products with certain characteristics, such as well-known brands, high-end attributes, a one-year shelf life or more, attractive packaging, and products that confer status and innovation.

Foodservice units and functional packages are important for the HRI sector, as well as products that optimize kitchen processes, such as dehydrated, lyophilized, and pre-cooked and prepared mixes.

Table 6: Top Consumer-Oriented Products (COP) Imported by Brazil from the World

Top COP Imported from the World (2023)	Value (US\$ Million)	%Δ 2022/23
Dairy Products	1,381	38
Processed Vegetables	698	4
Wine & Related Products	469	2
Fresh Fruit	525	29
Beef & Beef Products	289	-25
Soup & Other Food Preparations	347	21
Distilled Spirits	279	2
Chocolate & Cocoa Products	261	22
Non-Alcoholic Bev. (ex. juices, coffee, tea)	218	11
Fresh Vegetables	163	-18

Source: Trade Data Monitor (TDM) based on the Brazilian Secretariat of Foreign Trade (SECEX).

Table 7: Top Consumer-Oriented Products (COP) Imported by Brazil from the United States

Top COP Imported from the United States (2023)	Value (US\$ Million)	%Δ 2022/23
Dairy Products	97.8	36
Distilled Spirits	45.3	18
Eggs & Products	44.7	1
Soup & Other Food Preparations	33.8	-26
Tree Nuts	28.2	38
Condiments & Sauces	9.4	8
Meat Products NESOI	7.1	-18
Chocolate & Cocoa Products	5.1	-29
Processed Vegetables	5.0	-1
Fresh Fruit	4.3	38

Source: Trade Data Monitor (TDM) based on the Brazilian Secretariat of Foreign Trade (SECEX).

Products Present in the Market Which Have Good Sales Potential:

- Fresh fruits (pears, pomegranates, cherries)
- Beef (premium specialty cuts)
- Distilled spirits
- Sauces, dressings, and condiments
- Tree nuts (almonds and pistachios)
- Frozen potatoes

Products Not Present in Significant Quantities but Have Good Sales Potential

Food allergies and intolerance for specific ingredients provide niche opportunities, along with plant-based products and ingredients. Improved label practices also increase demand for gluten-free, wheat-free, lactose-free, and other functional foods. The natural, organic, and “healthy” segments are another attractive niche that serves affluent consumers; however, for the organic category, the costs to comply with Brazilian regulations may be a burden to foreign suppliers and make sales of small quantities

challenging.

Product Not Present Because They Face Significant Barriers

Brazilian legislation requires all food items to be approved prior to shipment by the Ministry of Health or the Ministry of Agriculture and Livestock. Currently, U.S. poultry and pork do not have market access.

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

Key Government Regulatory Contacts and Ministries responsible for Food Policies

Ministry of Agriculture and Livestock (MAPA)

Esplanada dos Ministerios, Bloco D
70043-900, Brasilia, DF

Phone: (55-61) 3218-2510/2468

Website: www.gov.br/agricultura/pt-br

Instagram: [mapa_brasil](https://www.instagram.com/mapa_brasil)

Ministry of Health (MS)

Agency of Sanitary Surveillance (ANVISA)

SIA Trecho 5, Área Especial 57
71205-050, Brasilia, DF

Phone: (55-61) 3462-6000

Website: www.gov.br/anvisa/pt-br

Instagram: [anvisaoficial](https://www.instagram.com/anvisaoficial)

Other Import Technical Contacts

Brazilian Food Processors' Association (ABIA)

Rua Butanta, 336, 3rd floor
05424-000, Sao Paulo, SP

Phone: (55-11) 3030-1353

E-mail: abia@abia.org.br

Website: www.abia.org.br

Instagram: [abiaindustriadealimentos](https://www.instagram.com/abiaindustriadealimentos)

Brazilian Food Ingredients and Additives Association (ABIAM)

Rua Hungria, 664, cj 51
01455-000 Sao Paulo, SP

Phone: (55-11) 3034-3541

Email: abiam@abiam.com.br

Website: www.abiam.com.br

Please do not hesitate to contact our offices for questions or comments regarding this report or to request assistance to export agricultural products into Brazil:

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Attachments:

No Attachments

