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**Report Highlights:**

The Brazilian Food Processors' Association reported 2024 Brazilian food processing sector revenues at US\$233 billion, a growth of 9.9 percent compared to the previous year. Brazil heavily relies on foreign suppliers to fulfill its food ingredient demands, which offers U.S. companies opportunities to provide high-value ingredients. Brazilian food manufacturers and ingredient importers seek innovative products from new suppliers. To learn more, contact us at [atosaopaulo@usda.gov](mailto:atosaopaulo@usda.gov).

## Market Fact Sheet: Brazil

### Executive Summary

Brazil is the largest economy in Latin America and one of the largest in the world. In 2024, Brazil's gross domestic product (GDP) increased 3.4 percent compared to the previous year, driven by strong domestic demand and exports.

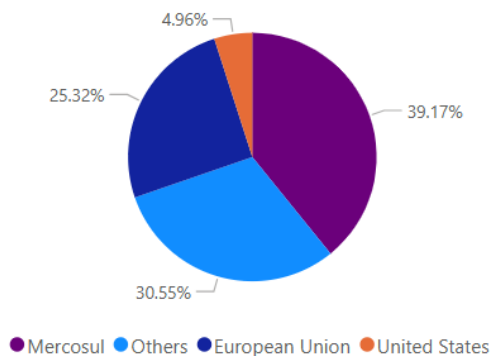
### Food Processing Industry

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. The result represents 10.8 percent of national GDP.

### Imports of Consumer-Oriented Products

In 2024, imports of consumer-oriented products by Brazil increased 15.52 percent over the previous year, reaching US\$ 6.7 billion. U.S. exports to Brazil increased 11.7 percent, hitting US\$ 333 million.

### Brazilian Imports of Consumer-Oriented Products in 2024



Source: Trade Data Monitor (TDM)

### Food Retail Industry

The Brazilian Supermarket Association (ABRAS) reported supermarket revenues at US\$135 billion in 2022. Brazil's retail sector includes 95,000 stores and serves more than 28 million consumers daily. The southeastern region of Brazil, which is

the country's economic hub, hosts 51 percent of the market.

### Quick Facts CY 2025

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

### Top 10 Imported Growth Products in 2023

Fruit & Vegetable Juices	Condiments &
Fresh Vegetables	Tree Nuts
Fresh Fruit	Enzymes
Chocolate and Cocoa	Wine
Processed Vegetables	Chewing Gum &

Source: SECEX

### Food Industry by Channels (U.S. Billion \$) in 2023

Food Industry Output	\$233
Domestic Market	\$170
Retail	\$123
Food Exports	\$63
Food Service	\$48

Source: ABIA

### 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

### Strengths

The United States is seen as supplier of high-quality ingredients

U.S. exporters tend to negotiate only high volumes

### Weakness

Exchange rate fluctuations decrease competitiveness

Brazilian importers usually start with small quantities

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

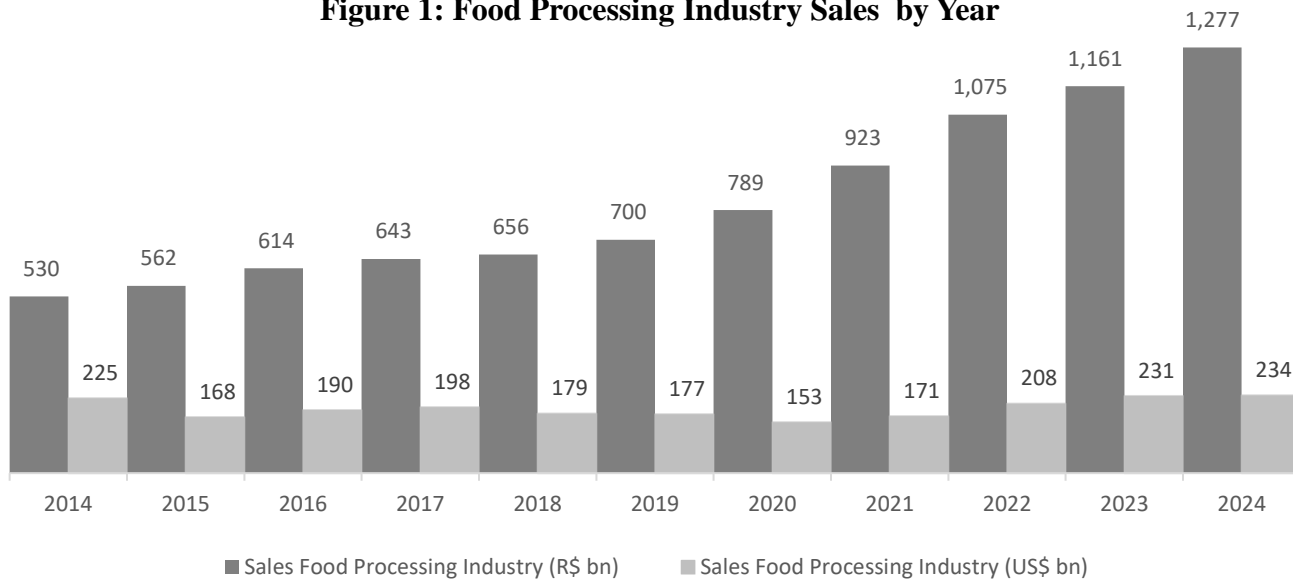
## SECTION I: MARKET SUMMARY

### Country 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 a substantial population, the potential for a vast domestic market and abundant natural resources. With these circumstances, long-term investment is likely to appeal to both local and international firms, 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.

According to the Brazilian Food Processors' Association (ABIA), Brazil's food processing sector reached revenues of R\$233 billion in 2024, a nominal increase of 9.9 percent over the previous year, representing 10.8 percent of the country's GDP. The industry created 360,000 new jobs (direct and indirect) and processed 62 percent of Brazil's agricultural output, with family farming supplying 68 percent of raw materials. 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.

**Figure 1: Food Processing Industry Sales by Year**



Source: FAS/Sao Paulo, based on ABIA data

**Table 1: Advantages and Challenges in the Brazilian Market**

<b>ADVANTAGES</b>	<b>CHALLENGES</b>
Multinational companies have demand for innovative and high-performance ingredients not present in the market.	Brazilian import procedures are very complex, causing difficulties for small to medium new-to-market U.S. companies.
The United States is known as a consistent supplier of high-quality products.	Short-term profits are rare; exporters must invest more long-term.
The Brazilian food industry values U.S. research and development.	Importers tend to buy small quantities to test the market, while U.S. companies are usually not predisposed to sell small volumes.
The shift away from a solely price-oriented approach to a cost-benefit approach makes U.S. products more competitive.	Strong competition from other European products

## **SECTION II. ROAD MAP FOR MARKET ENTRY**

The import process can be divided into three major phases: pre-shipment, shipment, and customs clearance. The number of procedures within each step may vary according to the product category.

### **Entry Strategy**

As a first step, U.S. exporters must determine if their product has access to the Brazilian market. The Agricultural Trade Office (ATO) in Sao Paulo is the primary contact for U.S. companies to clarify this. U.S. exporters should consider the ATO as an initial source of information and market guidance. U.S. companies can test the market through ATO marketing activities and profit from its market intelligence. Another way to test the market is through the various activities developed by State Regional Trade Groups and trade associations. Please see the [2023 Brazil Exporter Guide](#) for more information.

Note that the first importation of a product might require registration. Exporters routinely find the first import is the most challenging, with subsequent shipments becoming easier.

### **Import Procedures**

Oversight of imported food and beverage products is primarily under the responsibility of the Ministry of Agriculture, Livestock, and Food Supply (MAPA) and the Brazilian Health Regulatory Agency (ANVISA). These two government bodies ensure the safety of the food supply and enforce regulations related to food and beverage products throughout the supply chain. To fulfill local requirements, the importer must work with the exporter, particularly in the initial phase, when the documents for shipment are prepared. Upon product arrival, most import companies contract a customs agent who will be responsible for clearance formalities. Exporters must observe the most updated set of rules each administrative agency releases prior to shipment. Depending on the product, U.S. companies should contact the FAS Office of Agricultural Affairs, located in Brasilia, which is responsible for initiating the plant registration process with MAPA. Please see the [2023 Brazil FAIRS Report](#) for more information on import and certification requirements.

## Trade Shows

One of the most effective strategies for entering the Brazilian market involves participating in trade shows. There are numerous trade shows in Brazil throughout the year focused on ingredients that attract buyers from throughout South America (Table 2).

**Table 2: 2024 Brazil Trade Show Schedule**

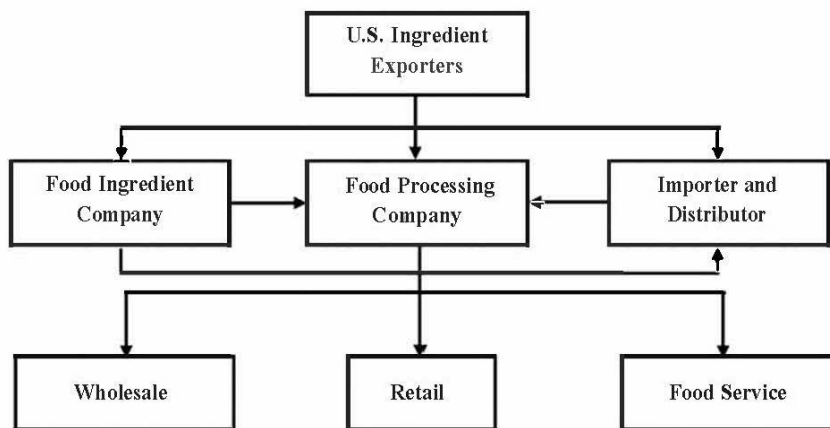
Show Name	Show Date	Products Featured
<a href="#">Nutri Ingredients Summit</a>	April 23-24	Ingredients and Additives
<a href="#">Fenagra</a>	June 5-6	Feed Ingredients
<a href="#">Food Ingredients South America</a>	August 6-8	Ingredients and Additives
<a href="#">PET South America</a>	August 14-16	Pet Food

Source: FAS/Sao Paulo

## Distribution Channels

Ingredients and additives are mostly brought into Brazil by a local importer, distributor, or food ingredient company (Figure 2). Large food processing companies also import directly.

**Figure 2: Distribution Channels for Foreign Foods and Ingredients**

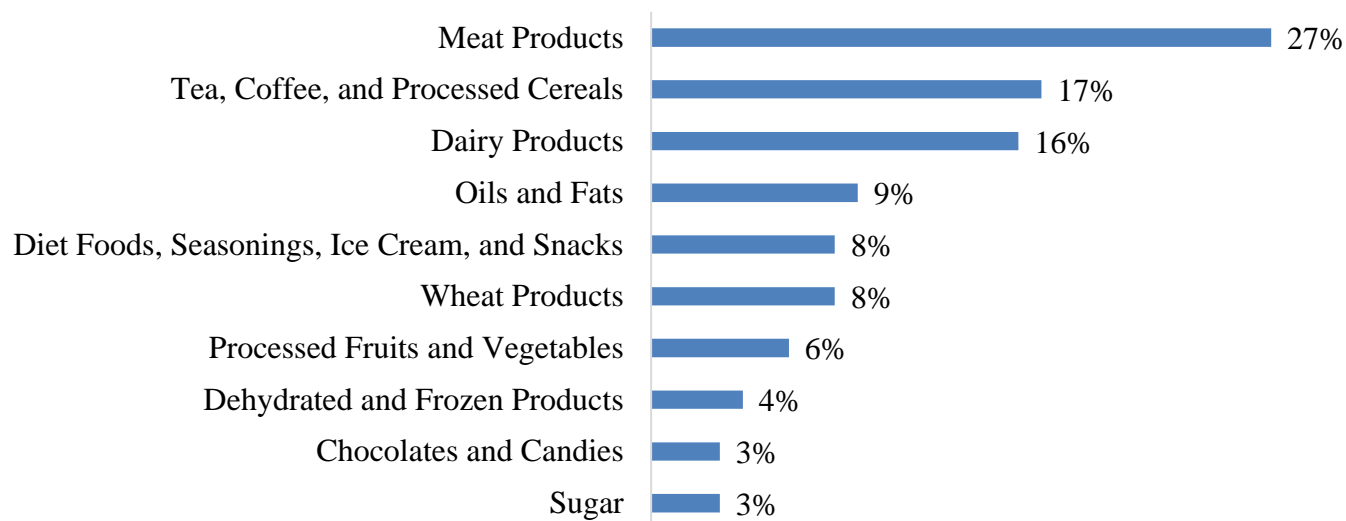


Source: FAS/Sao Paulo

## Major Segments

The United States has the potential to supply the Brazilian feed and food industries with advanced ingredients. Strong opportunities exist for dairy ingredients (including whey protein, milk albumin, and casein for infant nutrition), alternative proteins for plant-based items (including pea, soy, and rice), fibers (soluble and insoluble), emulsifiers and stabilizers, flavorings and enhancers, and vegetable fats (Figure 3 and Table 3).

**Figure 3: Share of Major Segments in the Brazilian Food Processing Industry by Gross Sales in 2023 (%)**



Source: ABIA

Note: Based on Brazilian market segments

**Table 3: Largest Food Processing Companies Operating in Brazil**

Company Name	Products	Origin
<a href="#">JBS</a>	Meat Products	Brazil
<a href="#">Ambev</a>	Beer and Soft Drinks	Brazil
<a href="#">Marfrig</a>	Meat Products	Brazil
<a href="#">BRF</a>	Meat Products	Brazil
<a href="#">Minerva Foods</a>	Meat Products	Brazil
<a href="#">Aurora Alimentos</a>	Meat Products	Brazil
<a href="#">Nestlé</a>	Food and Beverage Products, including breakfast cereals, coffee and tea, confectionery, dairy products, ice cream, frozen food, pet foods, and snacks	Switzerland
<a href="#">Coca-Cola</a>	Beverage Products	Brazil
<a href="#">Camil</a>	Grains, Sugar, Canned Products	Brazil
<a href="#">M. Dias Branco</a>	Bakery Products	Brazil

Source: Valor Economico

## **Sector Trends**

Brazil closely follows global food trends and explores innovative products. For example, there is a notable increase in plant-based options and products aimed at “boosting immunity” following the COVID-19 pandemic. The demand for ingredients that enable products to be labeled as “natural,” “organic,” and “gluten-free” is growing, along with the desire for detailed information on ingredient sourcing and manufacturing. In a drive to promote “transparent” labels, producers are increasingly labeling consumer products with ingredient origins for marketing purposes, which favors high-quality suppliers such as the United States.

## **SECTION III. COMPETITION**

Brazil represents a major market for food ingredients and additives, driven by its substantial population and growing demand for processed foods. However, limited domestic production makes Brazil reliant on imports. China, several European countries, and the United States are significant suppliers. Due to price sensitivity among Brazilian companies, China is a particularly strong competitor for additives such as antioxidants, food colorings, vitamins, and minerals. European product pricing is generally comparable to that of the United States, with key European competitors including the Netherlands, Denmark, and Germany.

Given the highly competitive international market for food ingredients, Brazilian companies prioritize both quality and cost when selecting suppliers. Continued growth in Brazil's food industry has increased the demand for these ingredients and additives, highlighting the need for reliable and economically feasible sources.

For macro ingredients such as hops, malt, tree nuts, and olive oil, the United States faces substantial competition from Mercosur countries and the European Union (see Table 4). Portugal and Spain dominate the olive oil market, while Argentina and Uruguay have competitive advantages in other categories, notably malt, benefiting from geographic proximity and duty-free access. Indonesia remains Brazil's primary supplier of palm oil.

Although total U.S. agricultural and related exports to Brazil decreased by 30 percent from 2022 to 2023, this decline primarily resulted from reduced ethanol exports. Conversely, exports of other U.S. agricultural products—including animal feed, hops, dairy ingredients, and tree nuts—either grew or remained stable.

**Table 4: Top Five Suppliers of Agriculture and Agricultural Related Products to Brazil in**

Country	Value (\$Million)	Average YoY Growth %	Country Market Share %
Argentina	\$4,026.53	22.5%	24.4%
Chile	\$1,659.22	17.5%	10.1%
Paraguay	\$1,494.40	38.3%	9.1%
Uruguay	\$1,341.34	-8%	8.1%
United States	\$891.85	29.7%	5.4%
Others	\$7,113.95	45%	43.1%
Total	\$16,527.29	24.2%	100%

2024 Source: TDM

**Table 5: Brazilian Imports of Food Intermediate Products from the U.S. in 2024**

Product Description	Total Brazilian Imports (\$Millions)	Total U.S. Imports (\$Millions)	YoY Growth % (U.S.)	U.S. Market Share%
Wheat And Meslin	\$1,629.67	\$88.43	222.17%	5.43%
Milk Albumin	\$154.09	\$77.89	34.06%	50.55%
Mixtures Of Odoriferous Substances And Mixtures	\$137.30	\$68.81	80.91%	50.12%
Peptones And Derivatives; Other Proteins And Derivatives	\$60.38	\$18.11	38.29%	29.99%
Almonds, Fresh Or Dried, Shelled	\$21.38	\$16.64	1.93%	77.84%
Pistachios, Shelled, Fresh Or Dried	\$15.53	\$13.62	111.99%	87.71%
Lactose And Lactose Syrup Containing By Weight 99% Or More Lactose	\$32.52	\$9.27	-29.88%	28.52%

Source: TDM

### Products Not Present in the Market which have Good Sales Potential

- Other nuts (walnuts, hazelnuts)
- Other dairy ingredients (caseinate and lactose)
- Pea protein and fibers (as plant-based ingredients)
- Natural flavors



**Products not Present Because They Face Significant Barriers**

The process of approving new ingredients in Brazil is bureaucratic and time-consuming. The Brazilian government requires new ingredients to go through an approval process, which may delay the local industry's adoption period of new additives or ingredients. Post suggests that U.S. companies contact the ATO office for assistance in analyzing the market conditions and regulatory framework for specific food products.

**Attachments:**

No Attachments