



**Euromonitor
International**

Processed Fruit and Vegetables in Brazil

March 2026

Table of Contents

Processed Fruit and Vegetables in Brazil - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Price-led pressure holds back packaged produce

INDUSTRY PERFORMANCE

Economic stress forces consumers to prioritise essential items in their baskets

Category progress remains dependent on climatic conditions

Brazilian consumers remain wary of frozen fruit

WHAT'S NEXT?

Strong growth anticipated in response to convenience demand

Health and wellness trends will support category sales

Sustainability comes into sharper focus

COMPETITIVE LANDSCAPE

Heinz continues to lead through Quero brand

Heinz benefits from persistent innovation

Olé enjoys further expansion as rival to Heinz

CHANNELS

Supermarkets channel benefits from a broad range of options

Warehouse clubs sees further though slowed growth in 2025

CATEGORY DATA

Table 1 - Sales of Processed Fruit and Vegetables by Category: Volume 2020-2025

Table 2 - Sales of Processed Fruit and Vegetables by Category: Value 2020-2025

Table 3 - Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2020-2025

Table 4 - Sales of Processed Fruit and Vegetables by Category: % Value Growth 2020-2025

Table 5 - Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2020-2025

Table 6 - NBO Company Shares of Processed Fruit and Vegetables: % Value 2021-2025

Table 7 - LBN Brand Shares of Processed Fruit and Vegetables: % Value 2022-2025

Table 8 - Distribution of Processed Fruit and Vegetables by Format: % Value 2020-2025

Table 9 - Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2025-2030

Table 10 - Forecast Sales of Processed Fruit and Vegetables by Category: Value 2025-2030

Table 11 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2025-2030

Table 12 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

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

MARKET DATA

Table 13 - Sales of Staple Foods by Category: Volume 2020-2025
Table 14 - Sales of Staple Foods by Category: Value 2020-2025
Table 15 - Sales of Staple Foods by Category: % Volume Growth 2020-2025
Table 16 - Sales of Staple Foods by Category: % Value Growth 2020-2025
Table 17 - NBO Company Shares of Staple Foods: % Value 2021-2025
Table 18 - LBN Brand Shares of Staple Foods: % Value 2022-2025
Table 19 - Penetration of Private Label by Category: % Value 2020-2025
Table 20 - Distribution of Staple Foods by Format: % Value 2020-2025
Table 21 - Forecast Sales of Staple Foods by Category: Volume 2025-2030
Table 22 - Forecast Sales of Staple Foods by Category: Value 2025-2030
Table 23 - Forecast Sales of Staple Foods by Category: % Volume Growth 2025-2030
Table 24 - Forecast Sales of Staple Foods by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/processed-fruit-and-vegetables-in-brazil/report.