



# The Food and Beverage Market Entry Handbook: Brazil

A Practical Guide to the Market in Brazil  
for European Agri-food Products



*Promotion of  
agricultural  
products*





# The Food and Beverage Market Entry Handbook

Brazil

Written by Agra CEAS Consulting

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Note: the term EU in this handbook refers to the EU-27 excluding the UK, unless otherwise specified. For product trade stats, data is presented in order of exporter size for reasons of readability.

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# 1 The Food and Beverage Market Entry Handbook: Brazil

This Handbook is intended to act as a reference for those agri-food producers planning for, or in the process of entering, the Brazilian market. This Handbook provides **step-by-step guides** on entering the agri-food market in Brazil including relevant information such as **analysis of the Brazilian market** for different product categories, **market access** and **market entry procedures, IP protection, referrals to professional buyers** and a signposting and referral system providing useful contacts and ways to penetrate the **Brazilian** market.

## How to use this handbook

Depending on your stage of market entry, company profile, and product range, different sections within this handbook will be helpful to a different extent for your business strategies.

For those wishing to learn more about the Brazilian food and beverage market in general, section 2 provides a general country overview; section 3 provides an overview of the agri-food market; and section 4 an overview on market entry. These latter two sections contain information on: the food and beverage market, market access procedures, customs procedures, sanitary and phytosanitary (SPS) and labelling requirements, intellectual property protection, including the status of geographical indications. The information contained within these sections is of a general nature and so may not be relevant for those in the more advanced stages of market entry.

If you want to find out more information relevant for your product, then check out the **Market Snapshots for Selected Products** (section 5). This content illustrates the market situation, market access procedures, SPS requirements etc. specific for this product or product category. This information will provide more industry specific information to consider as part of any market entry or market expansion strategies.

If you already have decided that the Brazilian market is where you want to be, but you need some support, then the **Support Services Directory** can point you in the right direction. Contact information for a service provider, business facilitation support organisation, or from a business contact, could help put you in touch with the right parties who can help you to build your brand in the Brazilian market.

## 2 Country introduction and overview

 	
<b>Capital:</b>	Brasilia
<b>Population:</b>	203 million (2023)
<b>Area:</b>	8.5 million sq. km., the 5th largest country in the world
<b>Political structure:</b>	Federal Presidential Republic
<b>Major languages:</b>	Portuguese (official), 21 recognized regional languages
<b>Major religions:</b>	Christianity (79% of the population) and atheism (17.6% of the population)
<b>Life expectancy:</b>	74 years (males: 69.56 years, females: 76 years)
<b>Currency:</b>	Brazilian Real BRL (R\$), BRL 5.36 = EUR 1
<b>GDP growth:</b>	2.9% (2022)
<b>Exports:</b>	19.56% of GDP (2022)
<b>Imports:</b>	18.62% of GDP (2022)
<b>Main exports:</b>	Iron ores (15.9%), soya beans (13.8%), petroleum oils (10.95%), cane or beet sugar (3.3%), and oil cake (2.6%)
<b>Main imports:</b>	Mineral fuels (18%), machinery (12%), electrical equipment (12%), fertilizers (9.2%), and organic chemicals (6.6%)
<b>Unemployment rate:</b>	7.6% (2022)
<b>Labour force:</b>	61.9% (2022)
<b>Main industries:</b>	<p><b>Agriculture:</b> 6.8% of GDP</p> <p><b>Manufacturing:</b> 20.7% of GDP</p> <p><b>Services:</b> 58.9% of GDP</p>
<b>Average per capita income (2023):</b>	EUR 7 923
<b>Per capita expenditure on food and beverages (2023):</b>	EUR 1 001
<b>Food and beverage market size inc. alcohol (2023):</b>	EUR 211 billion

Sources: Euromonitor International: Economies and Consumers, 2023; IMF; UN, World Bank; WHO, ECB. \* Goods only listed

### 2.1 Country overview: Brazil at a glance

#### 2.1.1 Past economic and political trends

- *Brazil is the largest country located within the sphere of nations commonly referred to as "Latin America".*
- *The country is the largest Portuguese-speaking country in the world, with the territory of Brazil being largely allocated to the empire of Portugal due to the Treaty of*

*Tordesillas of 1494. This also explains why Brazil stands alone as a Portuguese-speaking nation, surrounded largely by Spanish-speaking nations.*

- *Brazil gained independence in 1822, and since then, the country has continued to attract large numbers of European immigrants from Germany, Italy, and Spain, although Portuguese settlers are the largest group.*
- *Brazil throughout the 20<sup>th</sup> century swung from being politically a republic from the start of the 20<sup>th</sup> century to a military dictatorship during the mid-20<sup>th</sup> century, before swinging back to becoming a democracy in the 1980s.*

Brazil is the largest country located within the sphere of nations commonly referred to as “Latin America.” The country has the largest economy and population within Latin America and stands by a considerable distance as the largest country by total land area located in the region. Many indigenous groups and ethnicities existed in Brazil throughout history, such as the Marajoara; however, the discovery of the Americas in the 15th century drastically transformed the land area now referred to as Brazil. Spanish and Portuguese settlers and explorers began to take an interest heavily in South America, which in 1494 resulted in a treaty known as the Treaty of Tordesillas, which divided up the new world between Spain and Portugal, with Portugal receiving land areas to the east of the demarcation line. This in turn resulted in much of the land area referred to today as Brazil being assigned to the empire of Portugal. As a result, even today one can see the ramifications of this treaty, as Brazil stands as a Portuguese-speaking country while the rest of Latin America is predominantly Spanish-speaking. Portuguese settlers and explorers continued to reach the shores of Brazil, and over time, a number of settlements were developed, including the modern cities of Recife, Sao Paulo, and Rio de Janeiro.<sup>1</sup>

Brazil remained an entity of the Portuguese Empire up until 1822, when the country gained independence. Throughout the country’s time within the Portuguese empire and into the 20th century, the country attracted many European immigrants of multiple ethnicities, including Spaniards, Italians, and Germans, although the main immigrant group that came were the Portuguese. Post-independence, Brazil remained a largely resource-extraction-based economy. Into the 20th century, the country swung from a republic in the early 20th century to a military dictatorship during around two decades of the mid-20th century before swinging politically towards democracy by the mid-1980s. The country retained a largely isolationist stance towards global affairs throughout most of the 20th century.<sup>2</sup>

### 2.1.2 Current economic situation and mid-term outlook

- *Brazil adopted a more neo-liberal approach to trade and economics towards the end of the 1980s.*
- *The country introduced a new currency, the Brazilian Real, in the 1990s and enacted a number of fiscal and monetary measures aimed at controlling inflation.*
- *The economy is heavily influenced by international demand and prices for Brazilian commodities such as iron ore and petroleum, with high prices during the 2000s resulting in an economic boom in Brazil. The decline of these prices during 2014–2016 heavily influenced an economic recession in the country during this period.*
- *The country returned to economic growth in 2017, and it has sustained a nominal growth rate ever since except for 2020, when the economy contracted as the global economy slowed down due to the outbreak of COVID-19. Going forward, Brazil is expected to retain nominal economic growth of around 1.8%; however, international*

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<sup>1</sup> A Concise History of Brazil, Boris Fausto, Available at <https://reviews.history.ac.uk/review/146>

<sup>2</sup> Brazil through the 20<sup>th</sup> Century, Sutori, Available at <https://www.sutori.com/en/story/brazil-through-the-20th-century--GArZjg6dCDeQAuBpzrJYCqCG>

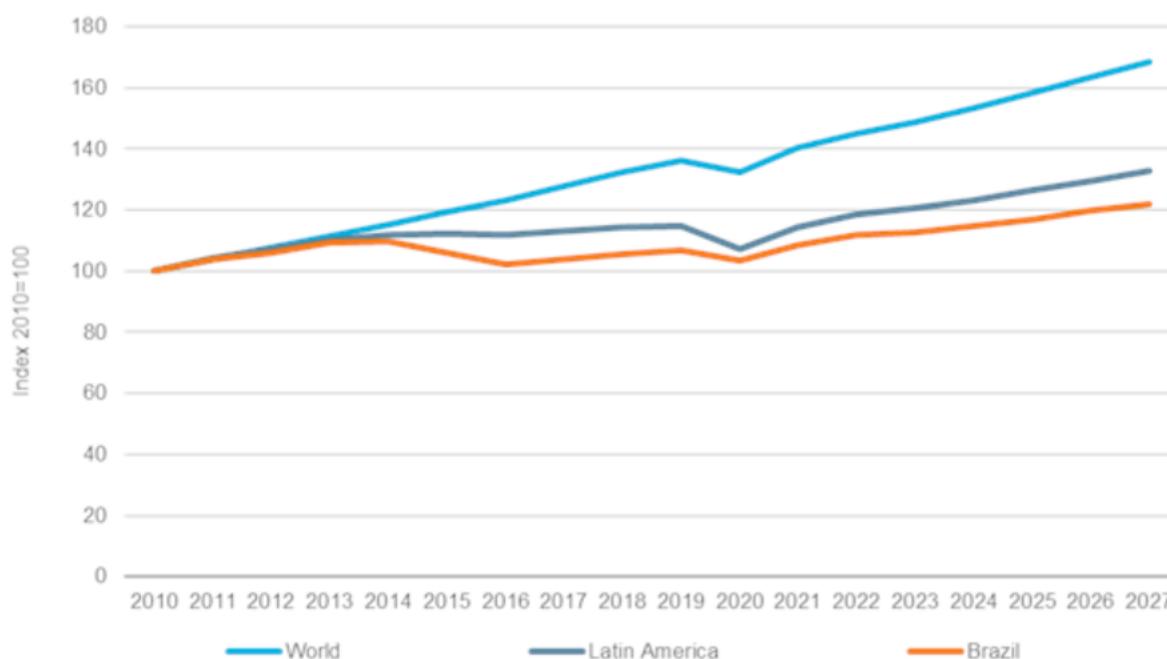


*commodity prices and political financial planning will play a large role in how the economy will perform.*

Brazil adopted a more neo-liberal approach to economics towards the end of the 1980s. The country ended the old policy of closed economies and developed more of a focus on import substitution and industrialization, with tariffs being cut in half during this period. Inflation remained a large issue in the country throughout the end of the 20th century. A set of measures were introduced in 1994 known as the Plano Real Plan; a new currency was introduced now known as the Real; and a series of fiscal and monetary policies were enacted aiming to keep inflation under control in the country. This helped to stabilize the economy going into the 21st century, and for the first decade, the country's economy grew rapidly from figures such as a 5.7% growth rate in 2005 to 7.5% in 2010.<sup>3</sup>

The first decade of the 21st century was an economic boom period in Brazil. Going into the 2010s, the Brazilian economy began to contract as the global price of many of the country's main export products, such as iron ore and petroleum, began to decline. This triggered the 2014 Brazilian economic crisis, which saw three consecutive years of economic contraction in the country. Despite the economic situation, Brazil played host to the 2014 FIFA World Cup and the 2016 Olympic Games, which brought a lot of international attention to the country. By 2017, the economy began to return to growth. The economy recorded positive growth rates up until 2020, when the shutdown of the global economy resulted in an economic slowdown in Brazil as demand for its resources once again declined. Brazil, however, fared slightly better than other Latin American states during this period and returned to growth in 2021. Rising private consumption, capital investments, and external demand are set to aid Brazil in retaining a GDP growth rate going forward of around 1.8% between 2023 and 2027.

**Figure 2-1: Real GDP Growth and Per Capita GDP in Brazil: 2010-2027**



*Note: Data for 2022 onwards is forecast.*

Source: Euromonitor International: Economies and Consumers, 2023

<sup>3</sup> The Real Plan, Banco Central Do Brasil, Available at <https://www.bcb.gov.br/en/monetarypolicy/realplan>

### 2.1.3 Population trends

- *The population of Brazil stands currently at around 203 million.*
- *The country of Brazil is very ethnically mixed, with 47% of the population being ethnically white, 43.1% of the population being multiracial, 7.1% of the population being ethnically black, and 1.1% of the population being ethnically east Asian (mainly from Japan).*
- *Brazil is heavily urbanized, with 87.5% of the population living in an urban centre, which are mainly on the coast. As a result, the absolute majority of the population lives along the coast, with the population density within the interior of the country being quite small.*
- *With a current fertility rate of 1.6 births per woman, the population of Brazil is expected to peak around 2045 at 223 million before beginning to decline.*

The current population of Brazil stands at around 203 million, which makes the country the 6th most populous country in the world<sup>4</sup>. Most of the population of Brazil lives along or near the coast of the country, as this is also the region with the largest number of cities. Within the interior, with the exception of the cities of Brasilia and Manaus, the density of the population declines rapidly. For example, the most densely populated state in Brazil is Sao Paulo, with a population density of 166 people per square kilometre; this declines to just 2 people per square kilometre in the state of Roraima. The most populated region is the southeast of Brazil, which incorporates the regions of Sao Paulo, Rio de Janeiro, Minas Gerais, and Espirito Santo. This region alone has 86.3 million inhabitants, accounting for around 40% of the population. The northeast of Brazil around the city of Salvador has a population of around 56.9 million, followed by the south of Brazil around Curitiba with a population of 29.4 million, the north of the country around the city of Manaus with a population of 17.7 million, and finally the centre of Brazil around the city of Brasilia with a population of 15.6 million. A map of the regions as broken down above is provided in Figure 2-4.

Brazil is a heavily urbanized country, with around 87.5% of the population living within an urban centre. This further explains why such a large amount of the population lives along the country's coast, as this is where many settlements such as Recife and Sao Paulo were founded by Portuguese settlers. The country is ethnically quite mixed as a result of the long-standing history of immigration from Europe and Japan combined with the influx of plantation workers from Africa throughout the later stages of the past millennium. The current population is split between a roughly 47% share of ethnic whites, 43.1% multiracial, 7.1% black, and 1.1% ethnic Asians (mainly from Japan). The total population of people who identify as indigenous stands at around 1.7 million people, or 0.8% of the population located mainly in the north west of Brazil.<sup>5</sup> Towards the south of the country, along the border with Argentina, the population tends to be more ethnically white, with the share of ethnically multiracial and black inhabitants growing as one moves further north along the coast and interior of the country. Much of the ethnic indigenous population of Brazil is located deep within the Amazon region or along the borders with Colombia and Peru. There are an estimated 208 000 Japanese Brazilians, with a further 2 million Brazilians of Japanese descent living in Brazil. These individuals tend to live

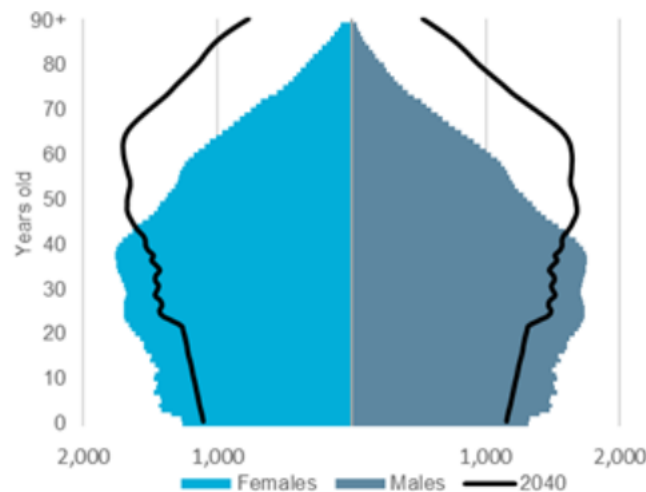
<sup>4</sup> This figure is the one provided by the Brazilian official statistics institute, IBGE, based on the resident population. There are various other figures which place the number higher, at around 215m. For the purpose of this handbook, the IBGE figure of 203m will be used.

<sup>5</sup> Brazil Indigenous Peoples, Survival international, Available at [https://www.survivalinternational.org/tribes/brazilian#:~:text=There%20are%20about%20305%20tribes,%25\)%20lies%20in%20the%20Amazon](https://www.survivalinternational.org/tribes/brazilian#:~:text=There%20are%20about%20305%20tribes,%25)%20lies%20in%20the%20Amazon).

in the larger urban areas of the country, with Brazil being home to the world’s largest Japanese community outside of Japan.<sup>6</sup>

Brazil currently has a fertility rate of 1.6 per woman, which is below the generally accepted replacement level of 2.1. This is indicative of an economy that is industrializing, but it does mean that the population is set to peak at around 229 million by 2045, with the population set to decline after this year. This further means that Brazil is set to fall behind Nigeria, Pakistan, and Indonesia in terms of population between 2023 and 2045. The rather isolative nature of Brazil, i.e., being geographically located quite far from major global conflicts, coupled with the linguistic isolation of the country within South America, means that total immigration to Brazil is relatively small for a country of its size. In 2022, the largest immigrant group came from neighbouring Venezuela with a total of 325 000; this was followed by Portugal with a total of 169 000 and Bolivia with a total of 140 000 immigrants arriving from that country. Overall, immigration is not expected to alleviate the future population decline forecasted for Brazil post-2045 if current rates remain consistent. Finally, the gender divide in Brazil is roughly 49% male and 51% female<sup>7</sup> (Figure 2-2).

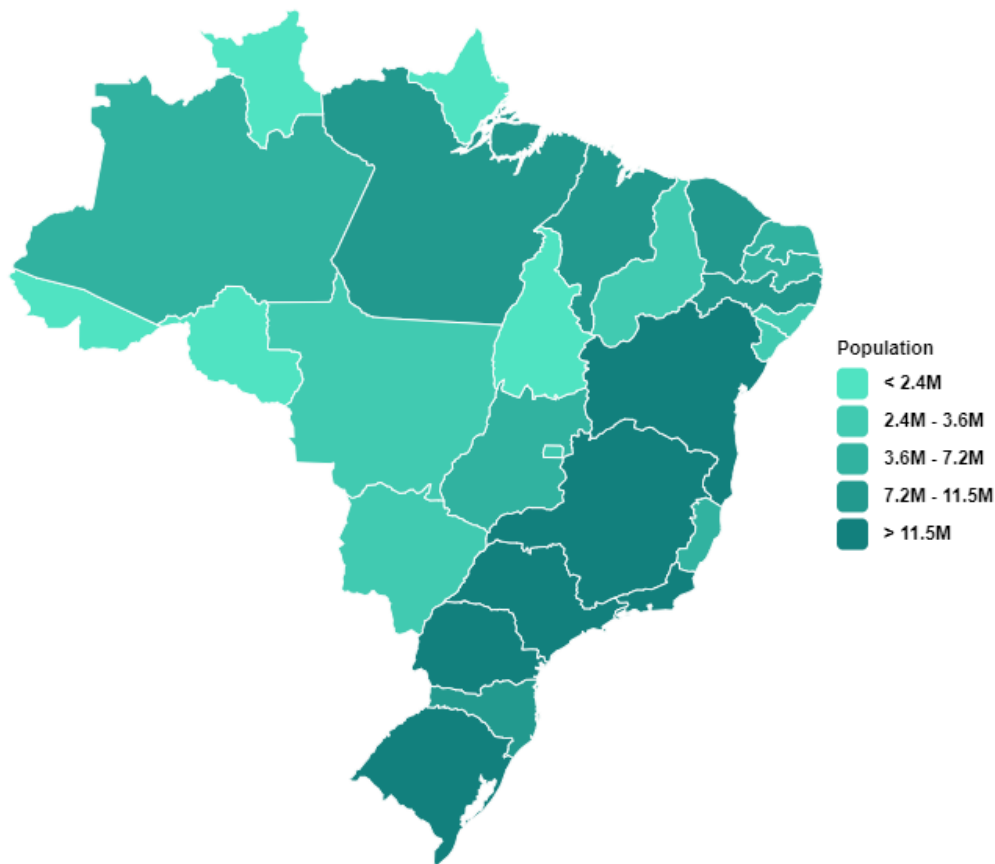
**Figure 2-2: Age Pyramid in Brazil, 2022 and 2040**



Source: Euromonitor International: Economies and Consumers, 2022

<sup>6</sup> Diversity in Brazil, Diversity Abroad, Available at <https://www.diversityabroad.com/articles/travel-guide/brazil>

<sup>7</sup> Brazil to exit the top 10 most populous countries list by 2100, The Brazilian Report, Available at <https://brazilian.report/liveblog/2022/07/11/top-populous-countries/>

**Figure 2-3: Population of Brazil by region**

Source: Agra CEAS

## 2.2 Geography and key markets

Brazil is the world's 5th largest country by land area and the largest country by land area located in South America (it is important to note that many Brazilians will refer to both South and North America as one continent, i.e. America, instead of the general North America and South America that is commonly used in western nations). The country stretches up to 8.5 million square miles, which means it borders nearly every other South American country with the exception of Chile and Ecuador. In total, Brazil borders ten countries, those being Argentina, Bolivia, Colombia, Guyana, Paraguay, Peru, Suriname, Uruguay, and Venezuela. The final country Brazil shares a border with is France, via the French department of French Guiana, meaning that Brazil technically shares a border with the European Union as French Guiana is treated as an outermost region. This means the territory, for all reasonable purposes, is within the EU, using the Euro as its sole currency; however, the territory is exempted from the Schengen Zone and the EU VAT area. This also means that Brazil is the country to which France shares its longest border with another country. The country's capital is the city of Brasilia, which was only founded in the 1960s. It was developed to encourage inland migration, to move away from the more densely populated Rio de Janeiro, and finally to encourage national cohesion by having a capital located more in the centre of the country. Brazil is made up of 26 states and one federal district, the federal district being the city of Brasilia, which is similar to the district of Colombia around the US capital of Washington, DC.

In terms of physical geography, around 60% of the entire Amazon rainforest is located within Brazil (and the rainforest represents around 40% of the total land area of Brazil); mostly in the north and north-west of the country. This region comprises some of the most unique ecoregions on earth. The Amazon rainforest is one of the key trademarks of Brazil and elevates the country to the forefront of climate discussions across the world, as the rainforest plays a key role in regulating the climate. Outside of the Amazon rainforest, the rest of the country is home to many different topographies and climates. Along the coast of Brazil is the Mata Atlantica rainforest, and the interior is home to the Cerrado tropical savannahs, which are the base of the Brazilian agricultural sector. Brazil has one of the world's most extensive river systems, with eight major drainage basins, all of which drain into the Atlantic Ocean. Two of these basins—the Amazon and Tocantins-Araguaia—account for more than half the total drainage area of Brazil.

A breakdown of each region by physical geography is provided below:

### **Centre-West**

The centre-west region of Brazil is made up of the states of Goias, Mato Grosso, Mato Grosso do Sul, and Distrito Federal. The region accounts for around 18.8% of Brazil's total territory. The centre-west of Brazil consists mainly of the tropical savannah known as the Cerrado. This region is home to Brazil's agricultural sector, with the country's livestock and cropland sectors being mainly located here, as the climate and topography of the region greatly complementing agricultural production. The region is also known for the Pantanal Wetlands, which are a unique ecosystem home to many indigenous wild animals. This region is the least populated among the regions of Brazil, although it is home to the capital of the country, Brasilia.

### **North**

The region of Northern Brazil consists of the states of Acre, Amapa, Amazonas, Para, Rondônia, Roraima, and Tocantins; and is the largest region by area. The region is largely made up of the Amazon rainforest, which is one of the most species-rich regions in the world. Due to the presence of the Amazon rainforest in this region, large-scale agricultural development is limited as the government and wider world push to limit deforestation in the region. Some of the larger cities located in northern Brazil include Manaus, Belem, and Porto Velho.

### **Northeast**

The northeast region of Brazil consists of the nine states of Alagoas, Bahia, Ceara, Maranhao, Paraiba, Pernambuco, Piaui, Rio Grande do Norte, and Sergipe. This region consists of four distinct climatic zones, the first of which is known as the *Agraste*. This zone is a narrow zone between the coastal forest and the semi-arid zone known as the *Sertao*. Most of this climatic zone is hilly and used for mixed farming. The previously mentioned *Sertao* zone lies directly to the west and is often referred to as the outback of Brazil due to the sparse rainfall and dry climate of this zone. The *Meio-Norte* is located just north of the *Sertao* and is a climatic zone that also experienced limited rainfall. The final climatic zone of the north-east of Brazil is known as the Zona da Mata and is located along the eastern coast of the region. Here, rainfall is more common, which allows for the production of products such as sugar cane. Some of the major cities found in north-eastern Brazil include Recife, Salvador, and Fortaleza.

### **Southeast**

Southeast Brazil is composed of the states of Espirito Santo, Minas Gerais, Rio de Janeiro, and Sao Paulo. This region is the most populated, accounting for around 38% of the population of Brazil as a whole. The region is home to the largest cities in Brazil, such as Rio de Janeiro and São Paulo, and is a key market of interest for EU exporters to the country. Southeast Brazil is home to most of the Atlantic Forest and the Ribera Valley and can be quite mountainous along the coast. Despite this, the region is the heartland of the Brazilian agri

sector, with the region being one of the largest producers of agri-food products not only in Brazil but globally (domestic production is further discussed in Section 2.3). Overall, for prospective EU producers seeking to enter the Brazilian market, it is fairly likely that Southeast Brazil will prove to be the main point of entry.

### **South**

South Brazil is composed of the states of Parana, Rio Grande do Sul, and Santa Catarina. The region is the third-most populous region of Brazil, with a population of around 29.4 million, but also the smallest of the five Brazilian regions, accounting for around 6.7% of the total land area of Brazil. The region is sub-tropical by the coasts, but it also incorporates numerous mountain ranges, valleys, and plateaus. The major cities found in this region are Curitiba, Porto Alegre, and Joinville. The region has historically proven particularly popular among European immigrants.

## **2.2.1 Overview of urban markets**

As mentioned above, Brazil is divided into five regions, each with its own blend of local culture and agricultural production practices based on the historic and geographic categorization of each region. Overall, Brazil is a federation composed of 26 states and one federal district (the capital, Brasília). The states of Brazil have autonomous administrations and collect their own taxes; they each have one governor and a unicameral legislative body elected by the citizens of the state. Most major urban markets of interest tend to be located along or near the coast of Brazil such as the cities of Sao Paulo and Rio de Janeiro although inland cities such as Brasilia and Manaus also offer opportunities. It is important however to note that the absolute majority of Brazil's population lives within the proximity of the coast of the country and the population density falls sharply the further one moves inland into Brazil, leading to more limited opportunities. Indeed, northern and central Brazil (with the exception of the capital city of Brasilia) is amongst some of the least densely populated regions in the Americas, while south east and southern Brazil are amongst some of the most densely populated regions in the Americas.

Figure 2-4: Regions and states of Brazil



Source: Agra CEAS based on various

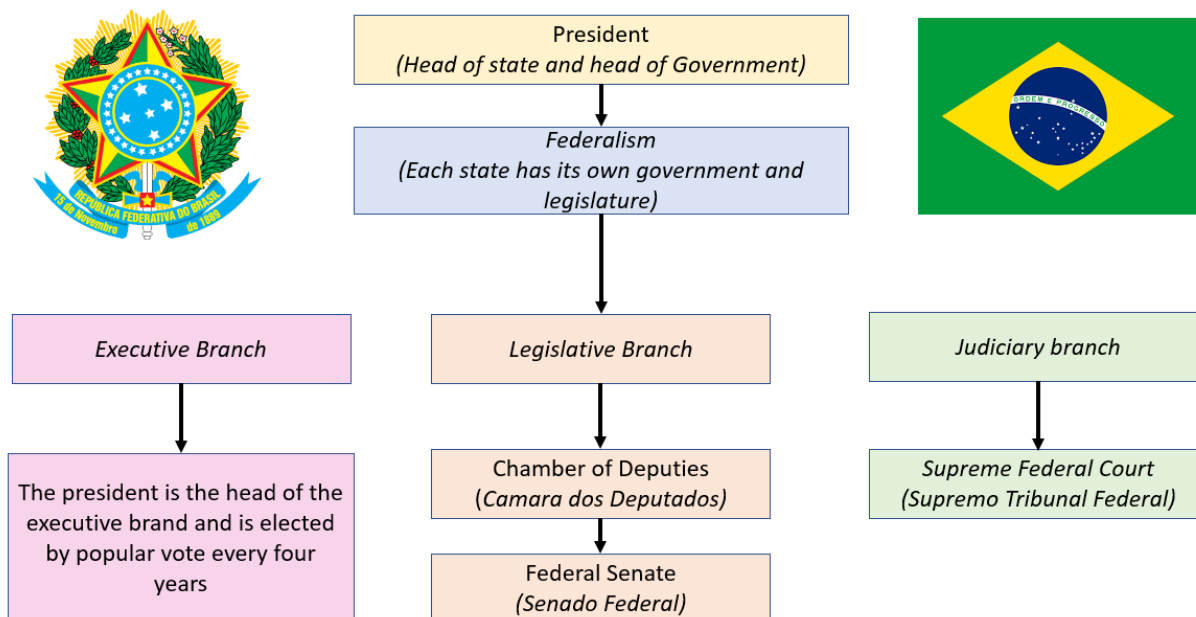
**Table 2-1 Regions of Brazil**

State	Capital
Acre	Rio Branco
Alagoas	Maceió
Amazonas	Manaus
Amapá	Macapá
Bahia	Salvador
Ceará	Fortaleza
Distrito Federal	Brasília
Espírito Santo	Vitória
Goiás	Goiânia
Maranhão	São Luís
Minas Gerais	Belo Horizonte
Mato Grosso do Sul	Campo Grande
Mato Grosso	Cuiabá
Pará	Belém
Paraíba	João Pessoa
Pernambuco	Recife
Piauí	Teresina
Paraná	Curitiba
Rio de Janeiro	Rio de Janeiro
Rio Grande do Norte	Natal
Rondônia	Porto Velho
Roraima	Boa Vista
Rio Grande do Sul	Porto Alegre
Santa Catarina	Florianópolis
Sergipe	Aracaju
São Paulo	São Paulo
Tocantins	Palmas

Brazil operates as a federal presidential representative democratic republic, whereby the president acts as both head of state and head of government. This is structured around a multi-party system. The federal government exercises control over the central government and is divided into three branches: the executive, legislative, and judicial branches. Executive power is exercised by the president, legislative power by the chamber of deputies, and judicial power by the supreme federal court.



Figure 2-5: Simple overview of the political structure of Brazil



Source: Agra CEAS based on various

## 2.2.2 Snapshots of important markets

Within the country of Brazil, the key important markets that stand out for EU producers are the cities of **Rio de Janeiro**, **Sao Paulo**, **Brasilia** and **Fortaleza**; as well as the southern axis between **Curitiba** and **Porto Alegre**. These markets include the largest cities in Brazil by population (generally also with the highest income levels) and are mainly located along the coast of Brazil with established business and cultural ties to EU member states. This list is not exhaustive however. It is worth noting that:

- The **northern / north eastern** coastal part of the country, while not generally as wealthy as the south, is developing, with multiple large metropolises of around 3m people or more. Furthermore, the region features a large and growing tourist sector which creates some demand for imported products; and the distance from the south means the region is under-served for some products (e.g. certain dairy products). In addition to the featured city of Fortaleza, the cities of **Salvador**, **Natal** and **Recife** stand out as being potentially interesting in this context. Further north, **Belem** may be of interest. It should be noted that the north also has the advantage of being geographically closer to the EU (and quite distant from both any production in the south of the country, plus from notable export competitor Argentina); hence creating a more level playing field in terms of logistical costs. Port infrastructure is also developing in the north.
- The **centre west** is experiencing huge economic growth, resulting in increased wealth and an underserved market for higher quality products. That said, logistics are very complex – though not just for products from the EU, but also for products of other origins. **Goiania** stands out in this context of growth.
- **Belo Horizonte** is a further affluent and potentially interesting city in the south-east, though its population is eclipsed by those of the larger cities profiled below.

**Figure 2-6: Location of focus markets**



Source: Agra CEAS

**Sau Paulo****Key facts:**

<b>GDP (2022):</b>	<i>EUR 253 billion</i>
<b>Real GDP growth (2022):</b>	<i>2.3%</i>
<b>Population:</b>	<i>12.1 million (21m metro)</i>

Sau Paulo is the most populous city in both Brazil and Latin America\* and is the largest city by population located outside of Asia, standing currently at a population of around 12 million, or slightly larger than the EU member state of Belgium. The city is the world's largest Portuguese-speaking city and the largest economic hub located in Brazil. Sau Paulo exerts heavy influence in international commerce, finance, arts, and trade and represents, overall, around 11% of Brazil's total GDP.

It also has the largest GDP of any city located in Latin America. The city of Sao Paulo is home to many of the largest multinational and domestic companies operating in Brazil, with up to 65% of all international companies with business ties in Brazil having their headquarters in the city.

Sau Paulo is regarded as a cultural melting pot, with the city being home to a large Arab, Italian, Portuguese, and Japanese diaspora. The city continues to attract a large number of migrants from both Brazil and wider Latin America. There is a particularly strong Italian diaspora, which during the 21st century at one point accounted for up to half the city's population. Today, this community continues to impact the city via its cultural and economic ties to Italy.

The multicultural demographics of Sau Paulo further influence the culinary dishes commonly enjoyed in the city, such as a Mortadella sandwich (of Italian origin and commonly found in Italy, which is extremely popular in Sau Paulo), Cod Pastel (*bacalhau*), which is a Portuguese deep-fried pastry dish, and finally *churros*, a well-known Spanish pastry desert often enjoyed in Sau Paulo.

As by far the largest economic and population centre of Brazil, the opportunities present for EU exporters are clear, as the city offers a key avenue towards entering the wider Brazilian market. EU member states such as Portugal and Italy share cultural ties with Sau Paulo, and direct flights from the EU from the cities of Porto, Lisbon, Madrid, Paris, Amsterdam, Milan, and Rome to Sau Paulo are currently in operation.

Sources: The History of Sau Paulo, ThoughtCo. Available at <https://www.thoughtco.com/the-history-of-sao-paulo-2136590>, Sau Paulo, Britannica, Available at <https://www.britannica.com/place/Sao-Paulo-state-Brazil>

\* Sao Paulo city is commonly accepted to be larger than Mexico city, though in terms of metro area, populations are similar.

**Rio De Janeiro****Key facts:**

<b>GDP (2022):</b>	<i>EUR 61 billion</i>
<b>Real GDP growth (2022):</b>	<i>1.8%</i>
<b>Population:</b>	<i>6.7 million</i>

Rio de Janeiro is the second-most populous city in Brazil and the sixth-most populous city located in the Americas. The city is often known as the cultural capital of Brazil and is one of the main economic and tourist hubs of the country. Rio is home to many of the most popular cultural sights and monuments often associated with Brazil, which include the Christ the Redeemer statue (one of the new 7 wonders of the world), Sugarloaf Mountain, and Copacabana Beach, to name a few. The city has had the attention of the world on several occasions; most recently, the city hosted the Olympic Games in 2016 and the FIFA World Cup Final in 2014. Overall, the city receives the most tourists per year of any South American city, with around 2.8 million annual visitors.

The city, like many in Brazil, is quite ethnically mixed, which reflects the history of the city and country of Brazil. Many immigrant communities from other countries that were formerly within the Portuguese Empire have established themselves in Rio de Janeiro, such as communities of Angola and Mozambique heritage. The city is also home to a large population of ethnic European communities, with the city hosting the largest ethnic Portuguese population found outside of Portugal and a sizeable Italian and Spanish community.

The multicultural demography of the city extends to some of the more popularly enjoyed foods, with notable examples including *feijoada* (often referred to as the national dish of Brazil; it is stewed beans in pork beef gravy), *churrascaria* (steak dish), and *coxinha* (chicken drumstick dish).

As one of the main tourist hubs in Brazil, the city of Rio de Janeiro has direct flights to many cities in the EU, which include Frankfurt, Madrid, Paris, and Lisbon. The city is one of the major gateway hubs into Brazil, and alongside Sao Paulo, it represents one of the two largest consumer markets located in the country.

Sources: Rio De Janeiro, Britannica, Available at <https://www.britannica.com/place/Rio-de-Janeiro-Brazil>, History of Rio, Rio The Guide, Available at <https://riotheguide.com/history/>

**Brasilia****Key facts:**

<b>GDP (2022):</b>	<i>EUR 59 billion</i>
<b>Real GDP growth (2022):</b>	<i>3.5%</i>
<b>Population:</b>	<i>4.8 million</i>

Brasilia is the federal capital of Brazil and the third-most populous city in Brazil. Brasilia is located within the central region of Brazil and is a planned capital (originally laid out in the shape of an airplane) that only began development in 1956 as part of a measure to encourage inward development and to have a capital city located in a more central location of the country relative to the large amount of the population that lives along the coast of the country. Brasilia today is among the wealthiest cities in South America, with its inhabitants having the highest GDP per capita in Latin America.

All three branches of the Brazilian government are in Brasilia, and the presence of government institutions has drawn in notable investments and interest in the city from within Brazil and further afield, with the city now being home to the third busiest airport in Brazil. The city is also among the fastest-growing cities in Brazil by population, with the city growing from a population of around 2.9 million in 2000 to 4.8 million as of 2023. This is expected to grow further to around 5.8 million by 2035.

The city is multi-ethnic, itself a reflection of the wider multi-ethnic population of Brazil as a whole. Population growth in the city is primarily driven by internal migration; due to the relatively new status of Brasilia as a settlement, the city lacks the historic connections to outside (mainly European) communities which is found in cities along the coast of Brazil. Nonetheless, with the presence of the governmental institutions in Brasilia there is ongoing interest in the city and wider market for EU producers of agri-food products. The city lacks the major international attention of Sao Paulo and Rio De Janeiro which makes it additionally difficult to travel to Brasilia however there are direct flights between Lisbon and Brasilia currently.

Overall, as the home to the government institutions of Brazil coupled with the city having the highest GDP per capita in Latin America by city, the interest in EU producers is clear as the population of Brasilia, many of whom are above-average earners, has an above-average capacity to afford and purchase food and beverages of EU origin compared to residents of other Brazilian cities.

Sources: Brasilia, Britannica, Available at <https://www.britannica.com/place/Brasilia>, The Story of Brasilia, Connect Brazil, Available at <https://www.connectbrazil.com/the-story-of-brasilia/>



**Curitiba-Porto Alegre****Key facts:****GDP (2022):**

billion)

**Real GDP growth (2022):****Population:**

(Metro)

Curitiba (EUR 41 billion)

Porto Alegre (EUR 27

Curitiba (4.5%)

Porto Alegre (3.6%)

Curitiba 1.7 million (Metro)

Porto Alegre 1.3 million

Curitiba and Porto Alegre represent two of the larger urban centres located in the key overall consumer region of Southern Brazil. Curitiba with a population of 1.7 million is slightly ahead of Porto Alegre which has a population of around 1.3 million. Furthermore, the two cities straddle a large part of the southern region, which itself is home to a large population with strong historical links to Europe.

Curitiba, the largest city in southern Brazil is one of the richer cities in Brazil as GDP per capita in this city stands amongst the highest in the country. The city has a well-established service sector and is known as a technological hub within Brazil. The city is home to many international manufacturers based in Brazil such as Volkswagen and Renault with the city being the second largest car manufacturer in Brazil. Curitiba has a diverse demographic with the city being one of the larger cities in Brazil that has been influenced by the impact of European migration, being home to sizable communities of Germans, Polish, Italians, Portuguese and Spanish residents.

Porto Alegre is also a relatively wealthy city in Brazil and is the 12<sup>th</sup> most populous city in the country. The city is particularly well known for its agricultural production base with extends to soybeans, leather, canned beef, and rice. The city is also known for its production base of electrical products in Brazil. Demographically, the city much like Curitiba and the rest of southern Brazil is heavily influenced by European migration with the city also having sizeable communities of European ethnicities.

As per capita incomes tend to be higher in these two cities compared to the rest of Brazil; and there is the influence of European communities which are long established in the region; the market opportunities for EU producers in this region of Brazil becomes clear.

Sources: Curitiba, Britannica, Available at <https://www.britannica.com/place/Curitiba>, Curitiba, Lonely Planet, Available at <https://www.lonelyplanet.com/brazil/the-south/curitiba>, Porto Alegre, Britannica, Available at <https://www.britannica.com/place/Porto-Alegre>

**Fortaleza****Key facts:**

<b>GDP (2022):</b>	<i>EUR 36 billion</i>
<b>Real GDP growth (2022):</b>	<i>2.2%</i>
<b>Population:</b>	<i>2.7 million (Metro)</i>

Fortaleza is the fourth most populous city in Brazil, with a total population of around 2.7 million. The city is the fourth most visited city in Brazil and lies as the geographically closest trading port to Europe, with notable trade links to Lisbon.

The economy of Fortaleza is based around trade and commerce, as the city's strategic location along the north-eastern coast of Brazil has made it a prominent centre for commercial activities. Tourism is also a key sector of the city's economy. Agribusiness is also important in the city and the wider region, as the city acts as a key distribution centre for food and beverages being exported and imported by Brazil.

The city is one of the more multi-racial cities in Brazil, which is reflective of the city's status as a key point of entry into Brazil throughout the country's history. The local cuisine of Fortaleza is very closely related to the typical cuisine found along north-eastern Brazil and includes traditional foods such as *Baiao de Dois*, which consists of rice, beans, and a selection of particular meats, normally poultry. Seafood is also particularly popular in the city.

The strategic trade links between Fortaleza and EU trading ports, coupled with the rising population and economy of the city and tourist links, result in Fortaleza emerging as a notable urban centre of interest for EU producers to target in the Brazilian market.

Sources: Fortaleza economy becomes the largest in northeast Brazil, BRIC Group, available at <https://bric-group.com/article/fortaleza-economy-becomes-largest-in-northeast-brazil>, Fortaleza, Britannica, available at <https://www.britannica.com/place/Fortaleza>

## 2.3 Domestic agricultural production and regions

Brazil is a major producer of agricultural products; indeed, the country ranks among the top ten global producers of many products. It is the world's largest producer of sugarcane, as well as ranking among the top ten global producers of: maize, cassava, oranges, rice, bananas, coffee, beans, pineapples, coconuts, sorghum, mango, papayas, lemons, avocados, acai, and Brazilian nuts. Agriculture currently accounts for around 6.8% of the total GDP of Brazil, and the crop value in Brazil is estimated to be around EUR 155 billion. Brazil is the largest agricultural producer in Latin America, and this is owed to the diverse climates and topographies of the country that allow for the widescale production of various agricultural products. A breakdown of production by region is outlined below.

### **South**

Southern Brazil, within the states of Rio Grande do Sul, Santa Catarina, and Parana, makes up a key region of agricultural activity in Brazil with its milder climate suitable for varied production. The region is known for its production of soy, corn, wheat, rice, tobacco, grapes, sugar cane, cassava, apples, beans, oranges, oats, and barley, amongst other cultivated products; and is the country's largest producer of pigmeat (as well as a major poultry producer). Around a third of the cereals produced in Brazil come from this region. The state of Rio Grande do Sul is the largest rice producer in Brazil, with Santa Catarina being the second largest producer. Rio Grande do Sul is also the largest wheat, grapes, onion, wine, and apple producer; Santa Catarina is the largest producer of onions and the second largest producer of apples; the final state of Parana is the second largest corn producer and the fourth largest producer of both strawberries and tangerines.

### **Southeast**

South-eastern Brazil, incorporating the states of Minas Gerais, Sao Paulo, Rio de Janeiro, and Espirito Santo, is responsible for the largest share of Brazilian agriculture, with this region being a major producer of coffee, sugar cane, oranges, soy, beans, peanuts, sorghum, carrots, potatoes, bananas, tangerines, and lemons. Minas Gerais is currently the largest coffee-producing state in Brazil, with around 54.4% of total Brazilian coffee production coming from this state. Minas Gerais is also a key producer of sugarcane, oranges, and beans. Sao Paulo is the largest orange producer in Brazil and is also a major producer of tangerines and cassava. It is home to around 90% of the total peanut production sector in Brazil. A favourable climate and topography, coupled with the major urban centres of Sao Paulo and Rio de Janeiro being in the southeast regions, help to explain why this region stands out for its importance within the wider Brazilian agricultural production sector.

### **Central-West**

This region, which incorporates the states of Mato Grosso, Mato Grosso do Sul, Goias, and Distrito Federal, is among the largest in relation to the production of soybeans, corn, sugar cane, tomatoes, beans, and sorghum both within Brazil and globally. The central-west region accounts for around 45% of the total cereal production sector in Brazil and is the largest region in relation to grain production. The region is also the largest cotton-producing region in Brazil. Furthermore, it plays an important role in Brazil's cattle industry.



## North

The states of Acre, Amapa, Para, Rondônia, Roraima, and Tocantins make up the north of Brazil. This region is particularly limited in widescale agricultural development due to the presence of the Amazon rainforest throughout most of the territory; however, production of products such as cassava and tropical fruits such as acai, pineapple, and coconuts is notable. Para is the largest producer of agricultural products in this region and is known to produce black pepper, coconuts, pineapples, and acai, with just over half of all acai fruits being produced and harvested in the state of Para.

## Northeast

North-eastern Brazil incorporates the states of Bahia, Sergipe, Pernambuco, Alagoas, Paraíba, Rio Grande do Norte, Cearra, Piauí, and Maranhão. With its tropical climate, the region is a major producer of cashew nuts, sugar cane, cocoa, cotton, coconuts, papayas, melons, bananas, mangos, pineapples, and guarana. The region is particularly impacted by the climatic cycle known as “El Niño,” which can result in prolonged dry spells, which impacts the total harvest of agricultural products. The production of cashew nuts is primarily undertaken in the north-eastern regions, coupled with cocoa, with the state of Bahia being the largest producer of cocoa in Brazil.

Looking more generally, a key feature of the Brazilian agricultural sector is the country’s **large livestock production sector**. The country is estimated to have the world’s second-largest herd of cattle, accounting for around 20% of the total world herd. The main cattle ranching centres of Brazil are within the states of Mato Grosso and through the central west region of Brazil. Currently, it is estimated that there are around 48.5 million cattle heads in Brazil.<sup>8</sup>

Brazil further has a large poultry meat production sector, being among the largest exporters of chicken meat in the world. South and south-eastern Brazil is home to the largest production of broiler chickens in Brazil, particularly within the state of Parana.

Brazil is among the top five producers of pig meat globally, with around 4.3 million tons of pig meat produced in Brazil annually. The three southern states of Santa Catarina, Parana, and Rio Grande do Sul account for over half of the country’s total pig meat production sector.

Finally with regards to livestock, the northeast of Brazil is home to around 85% of the country’s goat herd and 64% of the country’s sheep herd, particularly within the state of Bahia. Due to the majority of Brazil’s goat and sheep population being in a region with unfavourable climatic conditions, mass-wide goat and sheep farming is not as common in Brazil relative to the size of the country’s herd, which stands at around 8.9 million goats and 11.5 million sheep.

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<sup>8</sup> Brazil: Livestock and products semi-annual, USDA, Available at <https://fas.usda.gov/data/brazil-livestock-and-products-semi-annual-6#:~:text=In%202023%2C%20Post%20forecasts%20that,exports%20and%20recovering%20domestic%20consumption.>

Figure 2-7: Agricultural products commonly associated with the states of Brazil



Source: Agra CEAS based on various sources

## 3 Overview of the food and beverage market and demand for imported products.

### 3.1.1 F&B market summary

The food and beverage market in Brazil is dynamic and substantial, reflecting the country's diverse culinary culture and economic significance. In recent years, the industry has witnessed steady growth, with the sector playing a crucial role in Brazil's overall economic landscape. Thus, Brazil's status as a global agricultural powerhouse contributes a significant share of its GDP. As seen in the previous section, the contribution of the agricultural sector to Brazil's gross domestic product (GDP) amounted to 6.8% in 2022. When also including activities such as processing and distribution, the agriculture and food sector in Brazil makes up around 29 percent of the country's GDP, with the country a major exporter of agri-food products.<sup>9</sup>

The food and beverage market in Brazil is concentrated in various regions across the country, with certain areas playing significant roles in production, distribution, and consumption. Agricultural production by region was covered in section 2.3. São Paulo serves as a prominent centre for Brazil's food and beverage industry more broadly. Not only is it the nation's economic and financial hub, but it also houses the headquarters of major food companies. São Paulo has numerous food processing facilities, distribution centres, and a varied array of restaurants, solidifying its crucial role as a central figure in the industry.

Due in part to the wide variety of different fruit and vegetables cultivated in Brazil combined with the country's large livestock and poultry sector, the **food processing sector** in Brazil is quite large, valued at around EUR 190 billion in 2023.<sup>10</sup> Currently, there are around 38 000 separate companies in operation within the Brazilian food processing sector, of which the vast majority are small and medium enterprises. Companies such as JBS, Minerva Foods, and Itambe are among the largest food processors in Brazil. The food processing sector of Brazil heavily relies on foreign supplies to fulfil certain food ingredient demands, which in turn acts as a potential gateway into the Brazilian market for EU producers, although competition from the US and China in this sector is notable.

Major players in Brazil's distribution and grocery retail landscape include Carrefour, which operates hypermarkets and supermarkets; Grupo Pão de Açúcar (GPA), with brands like Extra and Pão de Açúcar; Grupo BIG, which acquired Walmart's operations; and Auchan, a French multinational with hypermarkets in Brazil. Atacadão, a Carrefour subsidiary, offers wholesale options, while Dia Brasil focuses on discount supermarkets. Mercado Livre, a prominent e-commerce platform, and regional chains like Supermercados BH contribute to the diverse and dynamic grocery retail sector in Brazil. The e-commerce landscape of the F&B market continues to grow. A further breakdown of retail outlets in Brazil is provided in Section 4.4.2.

### 3.1.2 International trade in F&B

The overall trade balance of Brazil concluded 2023 with a record surplus, marking a remarkable 61% increase compared to the previous year (EUR 90 billion) and surpassing the government's projections by an additional EUR 5.5 billion.

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<sup>9</sup> World Bank (2023), <https://data.worldbank.org/indicator/NV.AGR.TOTL.ZS?locations=BR>

<sup>10</sup> Food processing ingredients, USDA, Available at [https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Food%20Processing%20Ingredients\\_Sao%20Paulo%20ATO\\_Brazil\\_BR2023-0006.pdf](https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Food%20Processing%20Ingredients_Sao%20Paulo%20ATO_Brazil_BR2023-0006.pdf)

Agriculture holds substantial importance in Brazil's economy, positioning the nation as a major global contributor to the production and export of diverse agricultural commodities. The country's agricultural and livestock exports reached EUR 75 billion, reflecting a notable 9% growth from the preceding year. This substantial increase was significantly influenced by the record-breaking soybean crop of 134.6 million metric tons during the 2022–2023 period. Agribusiness imports in Brazil, on the other hand, totalled around EUR 18 billion, showing an increase from the previous year as well.<sup>11</sup>

As mentioned, Brazil is considered a net exporter of food and beverages. It is particularly strong in exporting soybeans, soybean products, corn, cotton, sugar, coffee, orange juice, and meat.<sup>12</sup> On the other hand, it imports products such as other grains and cereals not mentioned above, dairy, processed foods, and beverages, including alcoholic drinks such as wine and spirits. A further breakdown of the trade of agricultural goods between the EU and Brazil is provided in the section below.

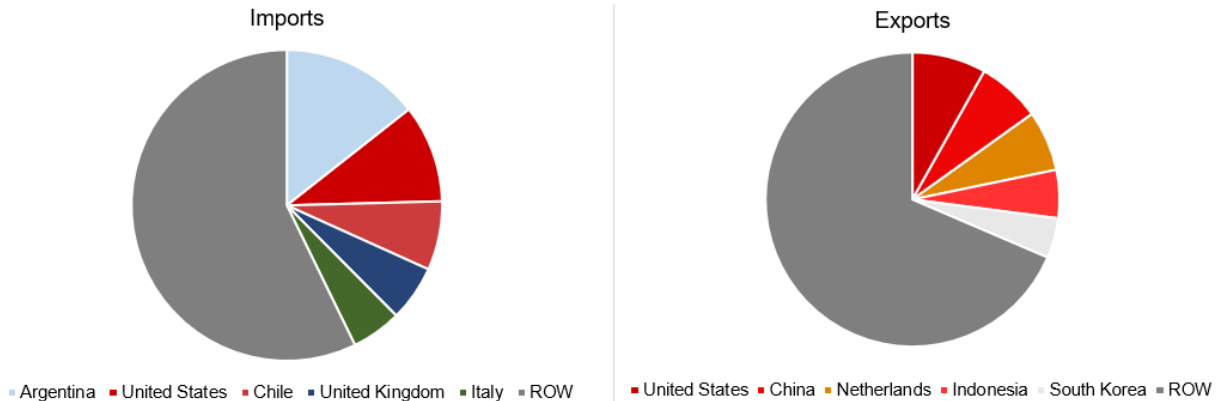
As shown in Figure 3-1, Argentina is the main source of food imports for Brazil, accounting for around 14% of total agricultural product imports by the country. This is followed by the United States, Chile, the United Kingdom, and Italy. On the other hand, Brazil mainly exports food products to the United States, followed by China, the Netherlands, Indonesia, and South Korea. South America, the US, and China are the food products trading partners for Brazil; however, the European Union also constitutes an important international agricultural trading partner for Brazil.

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<sup>11</sup> Brazil delivers record trade surplus in 2023 (2023), <https://brazilian.report/liveblog/politics-insider/2024/01/06/brazil-delivers-record-trade-surplus-in-2023/#:~:text=Brazilian%20agriculture%20and%20livestock%20exports,commodities%20that%20Brazil%20ships%20abroad>.

<sup>12</sup> Brazilian agricultural exports hit record in 2021 (2022), <https://brazilianfarmers.com/news/brazilian-agricultural-exports-hit-record-in-2021/>

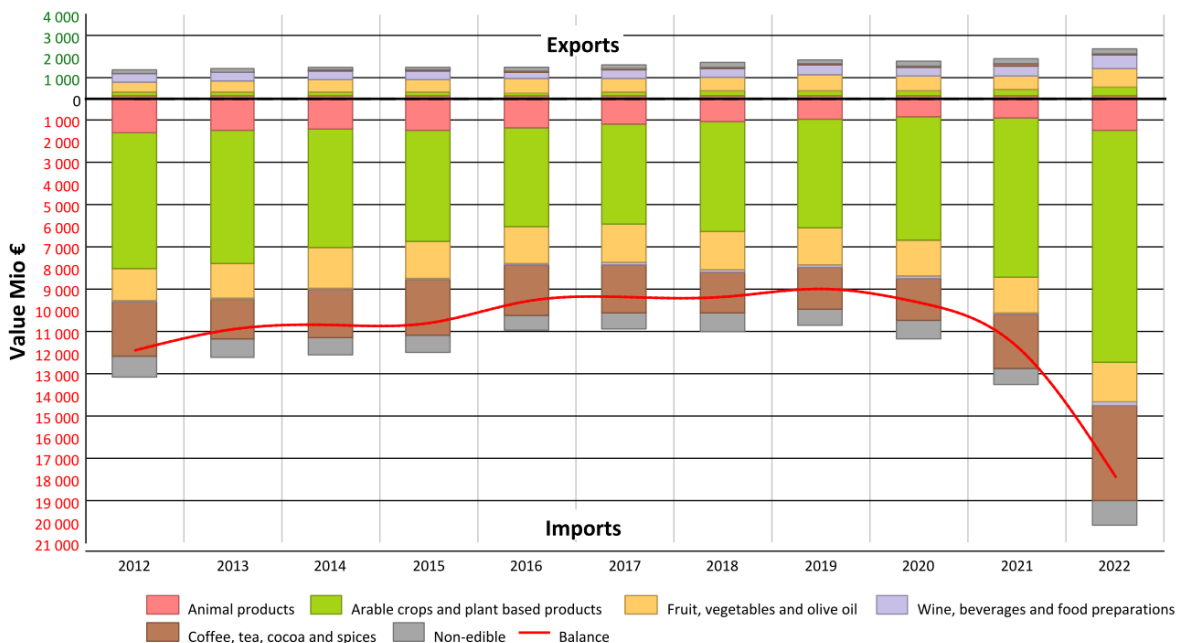
**Figure 3-1: Top five countries of Brazilian food exports and imports by value**



Source: World Integrated Trade Solution (WITS), Databank from the World Bank; Data from 2021 (note: some agri-food sectors covered in this Handbook may be missing).

The EU has a negative trade balance with Brazil regarding the trade of food and beverages, as Brazil is a net exporter of food and beverage products and important origin of products such as soybeans for the EU market. In 2022, the EU exported agri-food with a total value of around EUR 2.35 billion, whereas it imported about EUR 20.12 billion. Thus, the EU imported over eight and a half times as much as it exported. However, the appeal of EU food and beverage products is growing, as shown in Figure 3-2. Between 2021 and 2022 EU exports increased by close to 28%. This can be partly explained by increasing interest in EU products.

**Figure 3-2: Structure of EU-27 agri-food trade with Brazil, 2012 to 2022**



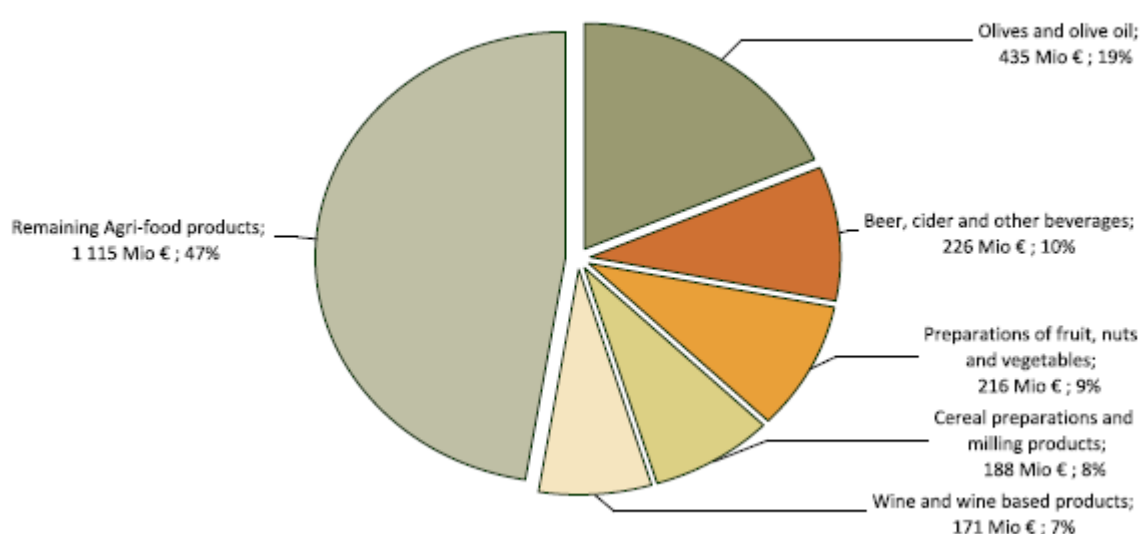
Source: European Commission: agri-food trade statistical factsheet, European Union – Brazil. Based on Eurostat-COMEXT data.

As per Figure 3-3 the major exports from the EU to Brazil in 2022 were, in terms of value:

- Olives and olive oil - EUR 435 million, 19% of total agri-food exports from the EU to Brazil.
- Beer, cider, and other beverages – EUR 216 million, 10% of total agri-food exports (it should be noted this is predominantly other beverages, with beer imports minimal).
- Preparations of fruit, nuts and vegetables – EUR 52 million, 9% of total agri-food exports.

Other notable exported products include cereal preparations and milling products (EUR 188 million), around 8% of all exports; and wine and wine based products (EUR 171 million), 7%.

**Figure 3-3: Top EU-27 agri-food exports to Brazil in 2022**



Source: European Commission: agri-food trade statistical factsheet, European Union – Brazil. Based on Eurostat-COMEXT data

### 3.1.3 The market for imported F&B

Even though the EU at present is exporting less than it is importing from Brazil it should be noted that total exports of Agri-good products to Brazil have been growing. Brazil has import demand for the following product categories of high relevance to EU exporters:

1. **Olives and olive oil:** The demand for olive oil has been on the rise globally, driven by increasing awareness of its health benefits and its versatile use in cooking. Brazil, with its growing interest in international cuisines and healthy eating, represents a market with significant potential for olive oil consumption. The EU is a significant exporter of olive oil and olives to Brazil as it is known for producing high-quality olives and olive oil. Olive oil, particularly extra virgin olive oil, is highly valued for its culinary and nutritional qualities.
2. **Alcoholic drinks:** The EU is a significant exporter of alcoholic drinks, including wine and spirits to Brazil. The export of these beverages reflects a combination of different aspects such as cultural preferences and consumer demand. The EU is for example renowned for its wine production, and EU wines, including those from countries like Portugal, France, Italy, and Spain, are often well received in the Brazilian market.

3. **Food preparations:** The EU exports a variety of food preparations to Brazil. Food preparations cover the wide range of processed or semi-processed products that are ready for consumption or further processing. In general, high-quality European goods do well. These also include for example chocolate, confectionery and other high quality food preparations.

Detailed information on the market for different individual imported product categories can be found in the corresponding market snapshots in section 5.

## 3.2 Growth Drivers and Trends

The key factors affecting the food and beverage market in Brazil are:

- **Population growth and changing demographics:** The large and growing population in Brazil (currently at around 203 million according to official statistics) serves as a substantial consumer base for the food and beverage industry. Demographic factors, such as a rising middle class and continued urbanisation, are key influencers of consumer preferences, fostering a demand for a diverse range of products. For example, with almost 88% of the population living in urban centres, concentrated mainly along the coast, urbanisation has significantly shaped consumer preferences. The country's changes align with the broader demographic shift seen in many developing/emerging countries, characterised by increased life expectancy and median age, alongside declining fertility and mortality rates. Currently, the low fertility rate of 1.6 births per woman, indicates a projected peak population around 2045 at 223 million, followed by a decline. As Brazil undergoes these demographic changes, the food and beverage market is poised to adapt.<sup>13</sup>
- **Growing purchasing power:** Brazil's purchasing power has undergone a notable evolution, driven by various economic and social factors. Over the last decade, periods of economic growth contributed to increased wealth and prosperity among the population. The middle class, expanding from around 38% to 51% since 2003, played a pivotal role in this transformation. While the nation's purchasing power has seen overall growth, it has not been linear, experiencing fluctuations influenced by economic situations, including the impact of events such as the COVID-19 pandemic.<sup>14</sup> As the middle class has expanded and purchasing power has increased, consumer preferences and behaviours within the food and beverage sector have undergone significant changes.<sup>15</sup> For example, the "I deserve" effect, observed among consumers, reflects an increased willingness, even among the middle and lower-income classes, to occasionally indulge in more sophisticated food and beverages.<sup>16</sup> In 2023, the economy was expected to continue to grow by about 2.6 percent, mainly because of a combination of agriculture and increased spending by households and the government.<sup>17</sup>

<sup>13</sup> Chapter 5. Brazil's demographic transition and its effect on public spending (2023), <https://www.oecd-ilibrary.org/sites/0ceb28a0-en/index.html?itemId=/content/component/0ceb28a0-en>

<sup>14</sup> Brazil's economy Challenges for the new president (2022), [https://www.europarl.europa.eu/RegData/etudes/BRIE/2022/738196/EPRS\\_BRI\(2022\)738196\\_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/BRIE/2022/738196/EPRS_BRI(2022)738196_EN.pdf)

<sup>15</sup> The Brazilian middle class and Its Illusory Search for an Elite Identity (2022), <https://revista.drclas.harvard.edu/the-brazilian-middle-class-and-its-illusory-search-for-an-elite-identity/>

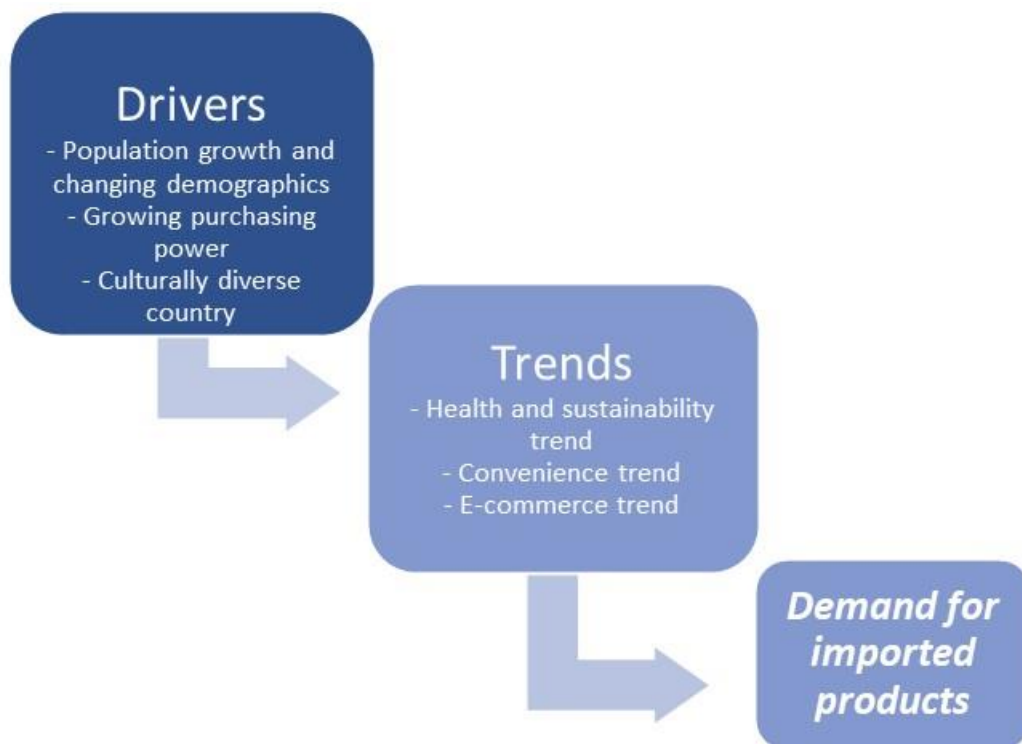
<sup>16</sup> Food and beverage market (2023), <https://www.infinitybrazilinvestments.com/food-and-beverage-market>

<sup>17</sup> Brazil (2023), <https://www.worldbank.org/en/country/brazil/overview#:~:text=Growth%20remains%20solid%20in%202023,12.1%20percent%20in%20April%202022.>



- **Culturally diverse country:** The country is home to a vast array of ethnicities, cultures, and traditions. Its population is composed of various ethnic backgrounds, including 47% white, 43.1% multiracial, 7.1% black, and 1.1% East Asian. This fusion of indigenous people, European settlers, African descendants, and immigrant communities has given rise to a vibrant culinary landscape that is shaping the food and beverage market. However, Portuguese culture has probably had the biggest impact on Brazil. Brazilians adopted the Portuguese language, their main religion, and many customs from it. The combination of various ethnicities and traditions has given rise to a diverse culinary landscape, making the country a melting pot of flavours and cuisines. The diversity is reflected in the types of foods consumed, cooking styles, and culinary preferences across different regions.<sup>18</sup>

**Figure 3-4: Growth drivers and trends – the Brazilian food and beverage market**



Source: Agra CEAS based on European Commission agri-food factsheet; Euromonitor International, and various.

In terms of current trends, the following stand out:

- **Health and sustainability trend:** This trend is taking root, fuelled by the growing health consciousness among the population. The surge in awareness regarding chronic diseases such as diabetes, heart disease, and obesity, coupled with the implementation of governmental policies and initiatives, has become pivotal in shaping consumer choices. A pronounced shift in consumer focus towards health and sustainability has led to an increased demand for food and beverage options that align with these preferences. This evolving trend is characterised by a preference for organic, natural, and functional foods, reflecting a desire for nutritionally dense products as well as sustainably sourced and ethically produced food and beverages. Consumers are actively seeking items with reduced sugar, salt, and additives, signalling a broader commitment to healthier lifestyles and a conscious effort to make more informed dietary choices.

<sup>18</sup> Cultural life (2023), <https://www.britannica.com/place/Brazil/Cultural-life>



- **Convenience trend:** This trend is experiencing rapid growth, boosted by shifts in social and economic dynamics, increased spending on food and beverage, evolving meal patterns, and a desire to explore new products. Notably, the on-the-go snacking trend is gaining popularity, particularly among the younger demographic and individuals with busy lifestyles. As hectic schedules become more prevalent, traditional grocery shopping is on the decline, prompting consumers to seek quick and convenient solutions. The demand for convenience food has surged as people opt for options to satiate their hunger when unable to allocate time for proper meals. This trend is widespread due to the increased availability and penetration of such products in the market, catering to the preferences and lifestyle choices of a significant portion of the population. The foodservice industry profits from this trend as well as busy consumers might choose to stop by a café or restaurant rather than cooking at home.<sup>19</sup>
- **E-commerce trend:** This trend is experiencing substantial growth, propelled largely by the younger generations, particularly millennials and Gen Z, who have demonstrated a heightened comfort level with online shopping. The landscape of e-commerce in Brazil witnessed a transformative shift, particularly catalysed by the COVID-19 pandemic. With lockdown measures and social distancing guidelines in place, consumers increasingly turned to online platforms for their grocery needs, finding it to be a safer and more convenient alternative to in-store shopping. This surge in demand for e-commerce grocery services has not only accelerated the overall growth of the digital retail landscape in Brazil but has also prompted a transformation in consumer habits.<sup>20</sup>

## 3.3 Consumer profiles and preferences

### 3.3.1 Consumer profiles

Certain aspects of the Brazilian population that were touched upon in earlier sections (notably 2.1.3) are worth bearing in mind when considering Brazilian consumers. Most notably:

- **Age groups:** In Brazil, understanding the diverse age groups within the consumer population is vital for businesses looking to tailor their strategies effectively. The majority of the population falls into the age range of 25-54. This mid-life demographic holds a substantial wealth accumulation potential, which makes it an important focus for businesses. For example, brands offering high-quality, premium products can align with the aspirations of the more affluent mid-life category. Additionally, businesses should not overlook the importance of younger and older consumers. For the youth demographic, understanding their dynamic preferences and tech-savvy behaviours is essential. On the other hand, regarding older consumers, it is important to recognise their health-conscious tendencies.<sup>21</sup>
- **Urbanisation:** Currently around 88% of the Brazilian population lives in urban areas. The effects of urbanisation are significantly shaping consumer behaviour, particularly in densely populated coastal cities such as Rio de Janeiro. The heavy concentration of the population in urban centres is pivotal in influencing consumption patterns and lifestyle trends. The increased purchasing power and density of urban dwellers present

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<sup>19</sup> Market Trends of Brazil Snack Bar Industry (2022), <https://www.mordorintelligence.com/industry-reports/brazil-snack-bar-market/market-trends>

<sup>20</sup> Brazil Ecommerce Market Size (2023), <https://www.mordorintelligence.com/industry-reports/brazil-ecommerce-market>

<sup>21</sup> Euromonitor Passport (2023): Brazil: Consumer profiles

a significant opportunity for businesses operating in major Brazilian cities to tap into a larger consumer market.

- **Cultural diversity:** As seen above, Brazil offers a mixture of influences from indigenous communities, European settlers, African descendants, and various immigrant groups. This diversity is not only evident in music, dance, art, and festivals but also deeply ingrained in culinary traditions. When targeting Brazilian consumers, an understanding of this is important as preferences, behaviours, and consumption patterns can vary significantly across regions and demographics. Therefore, the country offers opportunities for a large variety of products, but marketing strategies and product offerings need to be targeted to resonate with the target market.

Against the considerations set out above and bearing in mind the size and complexity of Brazil, generalised consumer classifications is a challenge. Nonetheless the bullet points below set out important overarching consumer types in Brazil. The nuances discussed above must be taken into account given that in such a diverse country, the relevance of concise universal consumer types is limited.

- **Frugal spender:** This consumer type has been created due to economic challenges and shifting priorities. Despite Brazil having one of the largest consumer market sizes globally, the aftermath of the recession and the COVID-19 pandemic has nonetheless reshaped spending habits. About three out of four Brazilians actively seek ways to cut costs, around six out of ten consumers remain committed to budget-friendly brands, and 1/5th of consumers explore different retailers for lower-priced offerings. Thus, frugal consumers in Brazil are individuals who prioritise cost-consciousness and value-seeking in their purchasing habits. Brazilian frugal consumers navigate a range of products, carefully considering price, quality, and durability. In a country where economic fluctuations and inflation can impact purchasing power, frugality becomes a strategic approach to managing household budgets. These consumers often engage in thorough research, seeking out discounts, promotions, and opting for budget-friendly alternatives without compromising on essential needs.<sup>22</sup>
- **Comfort seeker:** These are generally social consumers in Brazil who lead busy and hectic lives. They typically have higher incomes, which are needed for this lifestyle as they prefer dining out or ordering food and groceries for convenience. The rise of e-commerce has significantly influenced the habits of comfort-seeking consumers in Brazil, offering them the convenience of ordering their favourite products online. This consumer type has the desire for hassle-free solutions, allowing them to live comfortably. These consumers often gravitate towards brands that align with their lifestyle preferences. Their brand loyalty is fostered through a consistent delivery of quality, reliability, and an understanding of the comfort seekers' desire for convenience. Furthermore, the emphasis on value is important, as these consumers seek worthwhile experiences. In essence, comfort seekers represent a dynamic consumer group that values not only the comfort associated with their choices but also the brands that consistently deliver on quality, value, and a convenient overall experience, whether in physical establishments or through the convenience of e-commerce platforms.<sup>23</sup>
- **Holistic shopper:** These consumers approach their purchasing decisions with a holistic perspective, prioritising products that align with their values, particularly in terms of sustainability and environmental awareness. With a commitment to making eco-friendly choices, they often seek out brands that demonstrate a dedication to

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<sup>22</sup> Four Brazilian consumer behaviour profiles you need to know (2023), <https://www.wordbank.com/us/blog/market-insights/brazilian-consumer-behaviour/>

<sup>23</sup> Brazilian Consumer Behaviour & Trends Online: How to Reach Your Audience, <https://www.colibriconent.com/brazilian-consumer-behavior-and-trends/>

responsible practices and ethical sourcing. Embracing technology as a tool for informed decision-making, these shoppers leverage online resources and platforms to research products, compare reviews, and make choices that reflect their commitment to a well-rounded and sustainable lifestyle. While sustainability and ethical considerations play a pivotal role in the choices of the holistic shopper, general quality and price continue to be important factors in their decision-making process. These consumers seek products that not only align with their environmental values but also offer a high standard of overall quality. Additionally, holistic shoppers remain mindful of price points, recognising the importance of affordability. This nuanced approach signifies that, despite their dedication to socially responsible choices, they also appreciate a balance between quality, affordability, and sustainability.<sup>24</sup>

### 3.3.2 Cultural sensitivities and other considerations

Cultural sensitivities can be another consideration when it comes to understanding the Brazilian consumer and wider trends in Brazil. Understanding other social factors within Brazil that shape consumer behaviour and trends can be the key to successfully marketing products.

#### Multi-cultural population

As previously mentioned, Brazil stands out as an ethnically mixed nation. Today, Brazil is this unique blend of cultures due to its history of: Portuguese colonial influences; indigenous heritage, African roots from the influx of plantation workers from the continent; and immigration of European, Middle Eastern, and Asian people. The coexistence of all of these ethnic groups fosters a society where different traditions, languages, and customs come together.<sup>25</sup>

#### Brazilian cuisine – a blend of cultures

Brazilian cuisine is known to be one of the most varied in Latin America. It is a blend of various cultural influences, reflecting the country's diverse heritage. Indigenous, Portuguese, African, and even other immigrant contributions have shaped the unique flavours found in Brazilian dishes.<sup>26</sup>

The Portuguese influence is evident in staples like rice and beans, while the African influence is prominent in dishes like *feijoada*, which is a black bean stew with pork and sausage. Indigenous ingredients, such as cassava and native fruits, add a distinct flavour to many Brazilian recipes. The *churrasco* tradition, which is a style of barbecue, is a nod to the country's gaucho (cowboy) culture.

Additionally, immigrants, particularly from Italy, Japan, and the Middle East, have introduced new ingredients and cooking techniques, enriching Brazil's culinary landscape. This cultural blend results in a vibrant and diverse culinary experience that represents the melting pot of nations Brazil is.<sup>27</sup>

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<sup>24</sup> Euromonitor Passport (2023): Consumer types in Brazil

<sup>25</sup> Welcome to Brazil (2023), [https://www.diversityabroad.com/articles/travel-guide/brazil#:~:text=211%2C715%2C973%20\(July%202020%20est.\)&text=Ethnic%20groups%3A,0.4%25%20\(2010%20est.\)](https://www.diversityabroad.com/articles/travel-guide/brazil#:~:text=211%2C715%2C973%20(July%202020%20est.)&text=Ethnic%20groups%3A,0.4%25%20(2010%20est.))

<sup>26</sup> Food in Brazil (2023), <https://www.exoticca.com/us/america/south-america/brazil/gastronomy>

<sup>27</sup> Brazilian gastronomy, a clever blend of cultures <https://www.travel-brazil-selection.com/informations/brazilian-culture/cuisine/>

## Importance of religion

In Brazil Christianity is the predominant religion, accounting for around 79% of the population (with the majority of this Catholicism – which is the population of around 2/3 of the country). The culinary traditions associated with this faith are diverse and reflective of both local ingredients and cultural influences. Christianity, unlike some other religions, does not impose strict dietary restrictions, and thus allow for a wide array of foods to be enjoyed by its followers.

During the Lenten season, which is a period of fasting and abstinence, Brazilians may prepare dishes that focus on simplicity and sometimes avoid meat. As Easter approaches, the culinary landscape changes and special dishes are prepared.

Chocolate Easter eggs are a typical sweet eaten at Easter as well as *brigadeiros*, which are chocolate truffles. On Good Friday many people eat codfish (*bacalhau*) with rice and potatoes.<sup>28</sup>

Brazilian Christmas Dinner typically features a central dish, either a "chester" (a special type of chicken with a lot of breast and thigh meat) or *bacalhau*, depending on the region. These main dishes are often served with fresh salads, dried fruit, and cold potato salads mixed with apples and raisins. For dessert, two popular choices are *panettone*, a sweet bread with dried fruits or chocolate that reflects Brazil's Italian heritage, and *rabanadas*, the Brazilian version of French Toast.<sup>29</sup>

## Gifting and Hospitality

Gifting and hospitality hold significant importance in Brazilian culture, as they mirror the nation's warmth, friendliness, and generosity. The Brazilian people are renowned for their welcoming nature, which is deeply rooted in the culture's hospitality.

More than mere objects, gifts in Brazil are viewed to be symbolic gestures, that convey appreciation, affection, and gratitude, and thus show the value placed on different kinds of relationships. Gifting extends beyond surface-level exchanges, and is an expression of the importance of connections, whether familial, friendly, or romantic.

Gift giving is a common and cherished tradition, particularly during social gatherings, celebrations, and holidays. When invited to someone's home, it is customary to present a small gift, such as flowers, chocolates, or a bottle of wine, as a token of appreciation. Special occasions like birthdays and weddings are celebrated with enthusiasm, and the exchange of gifts becomes a gesture of goodwill. Additionally, during festive events like Carnival, the exchange of small gifts, such as masks or souvenirs, contributes to the lively and communal atmosphere.

Reciprocity plays a key role in Brazilian social interactions, where the act of receiving a gift is often met with the expectation of reciprocating the gesture at some point, further reinforcing the interconnectedness and value placed on relationships in this culture.<sup>30</sup>

## Public holidays

- **New Year** (1<sup>st</sup> January). It is the start of the year in the Gregorian calendar. Alcoholic drinks are popular to celebrate the new year. Brazilians have several food related

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<sup>28</sup> What do Brazilians eat on Easter?, <https://www.riodejaneiro.com/blog/2019/04/20/what-do-brazilians-eat-easter/#:~:text=Foods%20associated%20with%20Easter%20in,in%20North%20America%20for%20Thanksgiving.>

<sup>29</sup> How to have a traditional Brazilian Christmas (2023), <https://brazilian.report/guide-to-brazil/2023/12/20/traditional-brazilian-christmas/>

<sup>30</sup> The Brazilian Way: Gift-Giving Protocol in Brazil (2023), <https://giftvant.com/gift-giving-etiquette-in-brazil/>

traditions that are supposed to bring good luck such as rice, lentils, pomegranate, and grapes.

- **Carnival** (14<sup>th</sup> February). Carnival is a special celebration that takes the nation by storm, featuring lively music, dance performances, and parades that draw both locals and visitors into the excitement of this globally renowned event. As a significant portion of the festivities takes place outdoors, street food becomes a favoured option during Carnival. Vendors sell snacks and hand-held treats such as *pao de queijo* (a Brazilian cheese bread), *coxinhas* (tear shaped croquettes), and *churros*. In addition, alcoholic drinks are popular during Carnival.<sup>31</sup>
- **Easter - Good Friday** (29<sup>th</sup> March) and **Easter Sunday** (31<sup>st</sup> March). Easter is marked by both religious and festive traditions, with families coming together to celebrate the resurrection of Christ through church services and lively gatherings. The holiday is often accompanied by the exchange of chocolate eggs, symbolising new life and renewal. During the period of lent, which spans 40 days prior to Easter Sunday, Brazilians tend to opt for meatless meals, focusing on fish, seafood, and vegetable dishes instead. Some Brazilians may choose to abstain from alcohol as well.
- **Tiradentes Memorial Day** (21<sup>st</sup> April). This day honours the legacy of national hero Tiradentes, providing a moment for reflection and commemorative events that highlight his role in the country's pursuit of independence.
- **Labour Day** (1<sup>st</sup> May). The day is dedicated to honouring the contributions of workers. Rallies, parades, and events advocating for labour rights and social justice usually take place.
- **Whit Sunday** (19<sup>th</sup> May). Is a religious day marked by special church services and gatherings, symbolising the descent of the Holy Spirit and fostering a spirit of communal reflection and prayer.
- **Corpus Christi** (30<sup>th</sup> May). It is a religious holiday as well, that honours the Holy Eucharist.
- **Independence Day** (7<sup>th</sup> September). The day commemorate the country's declaration of independence from Portugal in 1822.
- **Apparition of the Blessed Mother Mary Day** (October 12<sup>th</sup>). Another religious holiday, which commemorates the reported appearances of the Virgin Mary. It is often marked by devotional activities and church ceremonies.
- **Proclamation of the Republic Day** (15<sup>th</sup> November). This day commemorates the historic moment in 1889 when the country transitioned from a monarchy to a republic.
- **Christmas, including Christmas Day** (25<sup>th</sup> December). Christmas Eve takes centre stage during the holiday season. With a majority of the population being Catholic, many Brazilians attend midnight mass, exchange gifts, and enjoy festive family gatherings on the night before Christmas. The following day is always a national holiday. Typical Christmas dishes in Brazil usually include meat such as turkey, pork or ham. *Panettone* (a cake) is a popular dessert.

The large size and cultural diversity of Brazil means that there are many different cultural symbols important to different parts of the population. However, on a national level the following cultural symbols are universally important to most Brazilians.

### The flag of Brazil

<sup>31</sup> Most popular foods eaten for Rio Carnival, <https://texasdebrasil.com/food-beverage/most-popular-foods-eaten-for-rio-carnival/>



The Brazilian flag is a significant symbol for the country, showcasing the country's identity and goals. It has a green background with a yellow diamond in the centre, featuring a blue globe with 27 stars representing the sky over Rio de Janeiro on the day the Republic was declared in 1889. In the middle of the globe is the national motto "*Ordem e Progresso*" (Order and Progress). It emphasises Brazil's commitment to unity and development. The flag's green and yellow colours represent the country's lush forests and the imperial dynasty. Altogether, the flag represents Brazil's diverse culture, natural beauty, and its collective hope for a positive future.



<sup>32</sup>

## Carnival

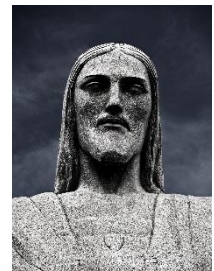


Carnival in Brazil is a special celebration that shows the country's lively and diverse culture. It is a time when people come together to enjoy music, dance, and colourful parades. With its vibrant costumes and rhythms, Carnival represents Brazil's mix of cultures, including Afro-Brazilian and indigenous influences. This festive event is not only a showcase of artistic expression but also a time for people to feel a strong connection to their country and each other. Carnival has its

roots in Catholicism and takes place before Lent.<sup>33</sup>

## Christ the Redeemer (statue)

The statue is an important symbol that represents both the country's strong Catholic beliefs and its sense of togetherness. Sitting on top of a mountain in Rio de Janeiro, the statue has open arms, welcoming everyone. Built in 1931, it looks over the city, reminding people of their faith, resilience, and cultural heritage. Many people from all over the world come to see this statue, making it a meaningful part of Brazil.<sup>34</sup>



## Football



In Brazil, football is not just a game – it is a part of the country's identity. Football is the most important sport in Brazil. The passion for football runs deep, and it brings people together. Whether it is playing in the streets or cheering in the famous Maracanã Stadium, football is a language that connects people from different backgrounds. The yellow and green jerseys represent more than just a team as they symbolise the pride and unity of Brazil. It is about the shared appreciation for the game that makes football an important cultural symbol of Brazil.<sup>35</sup>

Brazilians enjoy food and drinks during big games or gatherings with friends and family. Many Brazilians enjoy consuming alcohol and snacks while watching football matches.<sup>36</sup>

## Amazon Rainforest

<sup>32</sup> 7 National Symbols of Brazil (2023), <https://www.iheartbrazil.com/national-symbols-of-brazil/>

<sup>33</sup> What is Carnival? (2023), <https://www.riocarnaval.org/rio-carnival/what-is#:~:text=The%20Carnival%20is%20celebrated%20five,blend%20that%20defines%20Brazil%20culture.>

<sup>34</sup> Christ the Redeemer (2023), <https://www.britannica.com/topic/Christ-the-Redeemer>

<sup>35</sup> The role of football in Brazilian culture, <https://www.trafalgar.com/real-word/football-brazilian-culture/>

<sup>36</sup> The role of football in Brazilian culture, <https://www.trafalgar.com/real-word/football-brazilian-culture/>

The Amazon rainforest can be seen as a symbol of Brazil's nature and cultural roots. It is often called the "lungs of the Earth" because it helps keep the planet's climate in balance. For Brazil, particularly for the indigenous people who have lived there for a long time, the Amazon is highly important.<sup>37</sup> The different kinds of plants, animals, and the huge Amazon River all make it a special part of Brazil's identity. Taking care of the Amazon is not just about protecting the environment; it is also about preserving the unique culture and history connected to this rainforest.<sup>38</sup>



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<sup>37</sup> 'Many different Amazonias, Amazonians': The cultures of Brazil's Amazon (2023), <https://www.aljazeera.com/gallery/2023/11/28/photos-the-brazilian-amazons-vast-array-of-people-and-cultures>

<sup>38</sup> Brazilian Amazon (2023), <https://www.bezosearthfund.org/initiatives/brazilian-amazon-rainforest>

## 4 Market access and entry

This section provides details on the necessary requirements for entry into the Brazilian market, outlining existing market access restrictions and explaining procedures. A summary of market access and entry is presented in section 4.1, in the form of a SWOT analysis.

### 4.1 Summary SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> <li>▪ <b>Large population</b> (6<sup>th</sup> largest in the world) with <b>diverse ancestry</b> and many consumers with <b>historical links to a range of European countries</b>.</li> <li>▪ <b>Modern retail is common</b>; the range of supermarket chains is wide (a huge number of modern retailers with low overall market share); and many <b>supermarket chains import directly</b>.</li> <li>▪ <b>Imported products</b> are often perceived as <b>superior</b> to local products, and <b>European products</b> are seen as being particularly <b>high quality</b>.</li> </ul>	<ul style="list-style-type: none"> <li>▪ A <b>huge agricultural producer</b> – self-sufficient in most categories, and indeed a <b>major net exporter</b> of many categories.</li> <li>▪ Large country means that <b>internal transport is difficult and expensive</b>; most notably in the case of the cold chain.</li> <li>▪ Brazil may be considered a <b>market which requires a high level of engagement / focus</b>. This could come at the expense of opportunities on other markets; and also typically <b>requires EU exporters to invest in promotion and marketing</b> in order to differentiate their typically higher priced products.</li> </ul>
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> <li>▪ While opportunities in agricultural goods are limited, there are various opportunities in the area of <b>processed food and beverages</b>; with confectionery, various dairy products, biscuits, wines and certain processed meats being some example areas.</li> <li>▪ The huge size of the country means that there are <b>effectively multiple markets</b>, and hence <b>different opportunities in different regions</b>.</li> <li>▪ European products can do well in the <b>higher end markets</b>.</li> <li>▪ An <b>EU-Mercosur FTA</b>, if ultimately agreed, <b>would likely remove</b> some of the <b>technical barriers to trade</b>.</li> <li>▪ <b>Internal logistics challenges</b> (and the associated costs) can actually work <b>in the favour of EU exporters</b> to an extent in <b>regions which are more accessible from the EU</b>.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Import regulations</b> in general are strict and can be <b>challenging</b>. They can be particularly difficult for <b>agricultural goods</b>.</li> <li>▪ In many product areas (e.g. meat, beer), <b>huge domestic production</b> leaves <b>little room for imports</b>.</li> <li>▪ Nearby <b>Argentina</b> and <b>Chile</b>, which have favourable access terms through their Mercosur membership / trade agreement, offer <b>major competition in areas the EU is traditionally strong in</b>. The former notably tries to position many of its products as being high quality.</li> <li>▪ It is very <b>difficult for EU products to compete</b> with the above two import origins on <b>price</b>.</li> </ul>



## 4.2 Food and beverage legislation and regulations

The food regulation landscape in Brazil does have some complexities – most notably the presence of some Mercosur standards alongside national legislation; and the ongoing modernisation of the regulatory framework for food products. While overall regulation is less complex than that of many other third countries, care nonetheless needs to be taken by exporters to ensure compliance.

### 4.2.1 Import requirements/restrictions, customs procedures and documentation

Table 4-1 sets out the general documents required for all shipments. There are also various product-specific requirements. Table 4-2 provides a more detailed overview of the specific documents which are required for the different categories covered by this handbook.

**Table 4-1: General requirements for goods exported to Brazil (including F&B)**

Name	Description	To be prepared by	Language
Air Way bill	A document containing the details of the transportation of products by air and proving the transport contract between the consignor and the carrier's company. One Air Waybill may be used for the multiple transshipment of products.	Carrier (or his agent)	EN
Bill of Lading	A document containing the details of the international transportation of products by sea.	Carrier (or his agent)	EN
Cargo Manifest	A document notifying the authorities of the arrival of a vessel/an aircraft and summarising the goods loaded therein. Minimum requirements set out in Normative instruction RFB 800 of 27 December 2007.	Freight forwarder (or his agent)	PT
Commercial Invoice; pro forma invoice	A document containing the details of the transaction. There are requirements on minimum content for customs clearance though these are fairly standard invoice requirements. Pro forma invoice generally contains the same information as commercial invoice. It may be required as well.	Exporter	PT; or EN, ES, FR with a certified translation to PT.
Customs import declaration	Official form for customs clearance of goods worth more than USD 3 000; also contains information required for assessment of dutiable value.	Importer	PT
Simplified import declaration	Official form for customs clearance of goods worth USD 3 000 or less; also contains information required for assessment of dutiable value.	Importer	PT
Packing List	A document containing the details of the shipment and serving as a basis for the treatment of goods by customs.	Exporter	EN, ES or PT
Registration of declarants of goods in SISCOMEX	A document certifying that declarant of goods (normally importer and their responsible persons) have been registered to gain access	Normally importer	PT

Name	Description	To be prepared by	Language
	to the Integrated Foreign Trade System (SISCOMEX).		
Registration of legal representatives in SISCOMEX	A document certifying that declarant of goods (normally importer) have been registered for conducting activities related to customs clearance in SISCOMEX.	Importer	PT
Certificate / proof of preferential / non-preferential origin	A document confirming the preferential / non-preferential origin of the goods to be imported. While not always necessary, it may be requested by customs or the importer if there are doubts about the origin.	Exporter	Normally EN or PT
Insurance certificate	A document indicating details of an insurance contract for the import of goods. May be required for customs clearance.	Importer or exporter	Normally EN

Source: European Commission Access2Market.

Table 4-2: specific market entry requirements mapped to handbook categories

Name and description	Fresh meat	F&V	Dairy	Alcohol (spirits, wine, beer)	Olive oil	Confectionery	Processed meats	Biscuits / cereal bars	Processed F&V	Pasta	Baby food	Jams
<b>Non-automatic import licence.</b> Document proving that the bearer is authorised to import goods subject to non-automatic licencing.												
<b>Certificate of analysis.</b> Document certifying that microbiological and physical / chemical tests have been carried out by an appropriate laboratory in the country of export.												
<b>Inspection of agricultural products.</b> Document certifying that goods have been inspected by the Supervisory board for International and Cattle Raising of the Ministry of Agriculture.												
<b>Registration of importers of agricultural products.</b> Document confirming that importers of agricultural products have been registered with the local unit of the Supervisory Board of International Agriculture and Cattle-raising.												
<b>Registration of foodstuffs of animal origin.</b> Document certifying that foodstuffs of animal origin to be imported and their label have been registered with the Department of Inspection of Products of Animal Origin.												
<b>Veterinary health certificate for animal products.</b> Document confirming that products of animal origin												

have been inspected according to appropriate procedures. <sup>39</sup>												
<b>Permit to import products of animal origin.</b> Document permitting the actual importation of products of animal origin.												
<b>Authorisation to import endangered species and products.</b> Permits the import of certain wildlife products, notably those subject to CITES.												
<b>Phytosanitary certificate.</b> Issued by authorities of the country of export, translation into Portuguese may be required.												
<b>Variety of registration of seeds and seedlings; registration of seeds and seedlings; customs release for seeds and seedlings; seed testing certificate.</b> Four seed related requirements which only apply in very limited cases – recommended to consult Access2Market for more details.		e.g. 0701										
<b>Pest risk analysis.</b> Document certifying that pest risk analysis has been carried out on new plants and plant products.												
<b>Registration of importer of beverages.</b> Document certifying that importers of beverages and vinegar have been registered in Brazil.												
<b>Permit to import wine.</b> Document permitting the actual import of wine.				2204								
<b>Certificate of origin for beverages, fermented acids, wine, products derived from grape wine.</b> Document certifying the origin of these products.												
<b>Import inspection certificate for beverages.</b> Document certifying that beverages, etc. have undergone import inspection.												

<sup>39</sup> The templates/models of these health certificates to be signed by the competent authorities of the exporting health authorities shall be agreed upon bilaterally between MAPA and the exporting country before exports begin. See below the table for more information on exporting country authorisation.

<b>Certificate of maturation.</b> Document certifying that beverage to be imported have been stored and have matured a specific period of time.				2204 2208								
<b>Declaration of product compliance.</b> Document declaring that products are free from BSE.												

Source: Agra CEAS based on Access2Market



required for the category



only required for category in specific cases, consult Access2Market for more data

The Ministry of Economy (ME), through Secretariat of Foreign Trade (SECEX) has primary responsibility for controlling imports and customs. It manages the Integrated Foreign Trade System (SISCOMEX) which is the software platform used for handling licensing and customs clearance. The National Institute of Meteorology, Quality and Technology (INMETRO) under ME is responsible for testing both domestic and imported food products, hence ensuring they comply with specifications on the label and packaging material safety regulations.

As indicated in the table, there are specific import requirements for certain categories. Some more details are provided below:

- The Ministry of Agriculture (MAPA) Normative Instruction 67 of 5<sup>th</sup> November 2018 covers **beverages (including alcoholic ones)**. MAPA has lists of the bodies which can issue required documents from exporting countries (including certificates of analysis, typicity and origin where required). The register can be searched at the following link: <https://sistemasweb.agricultura.gov.br/siscole/consultaPublicaCadastro.action>
- For **animal origin products** to be exported (including dairy), countries must be authorised and processing facilities must be approved. A list of these establishments can be found at the following link: [https://sistemas.agricultura.gov.br/pgs\\_sigsif/pages/view/sigsif/consultahabilitacaoestrang/indexEstabelecimentoEstrangeiro.xhtml;jsessionid=hrJGlpXDWXKqcJX1r8GbJGkqB6JCSnybq9JNP3JTfHQGT2p9m2NQ!988972512](https://sistemas.agricultura.gov.br/pgs_sigsif/pages/view/sigsif/consultahabilitacaoestrang/indexEstabelecimentoEstrangeiro.xhtml;jsessionid=hrJGlpXDWXKqcJX1r8GbJGkqB6JCSnybq9JNP3JTfHQGT2p9m2NQ!988972512) It should be noted that it can be challenging for new establishments to be listed, with some applications having been ongoing for several years (see also section 4.3.4). Individual products must also be registered with MAPA (Department of Animal Origin Products Inspection Service – DIPOA), as must product labels. Products that adhere to a specific standard of identity and quality (*Regulamentos Técnicos de Identidade e Qualidade*, RTIQ) are automatically registered through the process; but those without an official standard undergo individual analysis. There are some EU products – certain types of processed meats (e.g. hams) in particular – which may struggle to comply with the RTIQ and hence need to undergo the individual analysis. MAPA also provides a page with the wider requirements for imports of animal origin. This is available at: <https://www.gov.br/agricultura/pt-br/internacional/portugues/importacao/animal/produtos-de-origem-animal-comestiveis/autorizacao-de-importacao>
- With regard specifically to **dairy products**, it should be noted that **raw milk products and cheeses** cannot be imported into Brazil.
- Phytosanitary certificates are required for **fresh fruit and vegetables**, but normally not for frozen ones. Pest risk analyses are required if a plant product: has never been imported into Brazil (or was last imported in 1997); is from a new country of origin; or is intended for a new use.
- There are requirements for **processed food and beverage** registration set by ANVISA. Currently there is mandatory registration for: **food for infants; enteral feeding products; supplements with probiotics / enzymes; products with functional / health claims; novel foods and ingredients; desalinated bottled water**, and **packaging from new technologies**. For processed food products which are exempt from this registration requirement, the local importer must request an exemption from registration. It should be noted that, as will be seen below, there has been a consultation on revising the categorisation of food by ANVISA.

**Care with customs controls and product compliance**

Exporters should be aware of the care needed for compliance and the potential challenges which may be faced with customs controls. More specifically:

- Customs controls can involve up to three bodies (Brazilian Customs, ANVISA and MAPA); with this combination of the three bodies creating extra bureaucracy and perceived incoherences.
- There have been reports of differing applications of laws at different ports, creating difficulties for importers in some cases. For example, in the case of incorrect wine labelling it has been reported that in some extreme cases, exporters have been told to make the necessary corrections (rather than importers), meaning that the consignment was returned to the exporter's country of origin for amendment and then had to be exported again.

To help overcome these difficulties, it is common for exporters to work closely with local partners (not just on import, but also on ensuring product compliance before export from the country of origin); with the import partner used being normally aware of the common practices in the port of entry of the shipment.

## 4.2.2 Food safety and other food certification requirements

### Key bodies and structures

Brazil is a founding member of *Mercosur* (Spanish) / *Mercosul* (Portuguese) – “the common market of the south”. As a customs union, there is duty-free access among member states, and a common external tariff for non-member states; however, there is not common regulation of agricultural and food products (though there are efforts to harmonise legislation and standards in order to eliminate non-tariff barriers; for example, some categories of food additives have been harmonised).

Furthermore, Brazil has three levels of government: federal, state, and municipal. However, federal regulations must be followed when there are conflicts between federal, state, and municipal legislation. Subsequently, agri-food legislation in Brazil is fundamentally set at a federal level, with the main bodies involved being the following:

- **The Ministry of Agriculture and Livestock (MAPA)**, which is responsible for policies related to Brazil's agri-business development (including animal and plant health issues) and the regulation, classification and inspection of imported products. It includes various secretariats, some of which have a particularly strong relevance for imported products:
  - **The Secretariat of Agricultural Protection (SDA)** which enforces regulations related to domestic and imported plants and animals (including derived product and by-products); other inputs such as feed; and organic products. There are different important departments under SDA including: Department of Animal Origin Products Inspection Service (DIPOA); Department of Plant Origin Products Inspection Service (DIPOV); and the General Coordination of the International Agricultural Surveillance System (CGVIGIAGRO).
  - **The Secretariat of Trade and International Relations (SCRI)**, which is responsible for co-ordinating Brazil's agricultural policy at an international level.
- **Ministry of Health (MS)**. The primary role of this MS is through the **National Agency of Sanitary Surveillance (ANVISA)**. This agency has primary responsibility for the enforcement of regulations related to processed food products. It started the process of modernising the legislative framework for food safety in 2021.

In addition to this, the **Ministry of the Environment (MMA)** has a role in the approval of agricultural chemicals; and shares competences with ANVISA for the toxicology of agricultural chemicals. Through the Secretariat of Foreign Trade (SECEX), the **Ministry of Economy** has some competences relevant for goods at the time of import (see previous section).

### Key legislative provisions

It is important to note that ANVISA has been in the process of modernising the regulatory framework for food products. While there have been extensive changes, this process is likely to continue. The most recent change was [Collegiate Board Resolution – RDC 839/2023](#) from December 2023, which addressed the procedure for proving the safety of and authorising novel foods / ingredients (including the definition of novel foods, which focuses on the concept of foods that do not have a history of safe consumption in Brazil). There was a [consultation in September 2023](#) on a proposal to update categorisation and registration, with aim of a simplified framework for these elements.

#### Online reference of relevant legislation in force for food

In view of the ongoing modernisation process, a key resource for confirming the relevant legislation in force is the ***biblioteca de alimentos (food library)***, which groups, in Portuguese, all the standards in force by theme. The last version from December 2023 can be found at the following link:

<https://www.gov.br/anvisa/pt-br/assuntos/regulamentacao/legislacao/bibliotecas-tematicas/arquivos/biblioteca-de-alimentos>

*This food library also currently contains indications of legislative areas which are expected to be updated in the next 24 months (2024/2025 in the case of the December 2023 version).*

There is also an online portal with a frequently updated list of normative instructions in force and which can be searched for legislation: <http://antigo.anvisa.gov.br/legislacao>

### Food additives

Food additives can only be used if it: (1) appears in the legislation for the food category; and (2) is used in its respective functions and maximum limits. The legislation defining this at present is the [Collegiate Board Resolution RDC - n. 778/2023](#) and [Normative Instruction - IN - n. 211/2023](#). The latter of these contains a consolidated list of approved additives.

Comprehensive information on the overall regulatory framework can be found, in Portuguese, at the following link: <https://www.gov.br/anvisa/pt-br/setorregulado/regularizacao/alimentos/aditivos-alimentares>

### Pesticide residues

Maximum residue levels (MRLs) for pesticides can be checked at the following link (in Portuguese):

<https://www.gov.br/anvisa/pt-br/setorregulado/regularizacao/agrotoxicos/monografias>

As a general rule, Brazil broadly follows Codex Alimentarius standards and recommendations when considering pesticides and MRLs permitted.

## 4.2.3 Labelling requirements

Labelling provisions span various pieces of legislation, including:

- [Decreto-Lei 986/1969](#) on instituted basic food standards



- [RDC 727/2022](#) on the labelling of packaged food
- [RDC 429/2020](#) on the nutritional labelling of packaged foods and the related [normative instruction 75 of 2020](#)

The food library contains a list of all relevant legislation.

While there are nuances between product categories, in general terms, labels in Brazil must contain the following information:

- ***The quality, nature and type of food / technical name (as defined in the specific technical regulation)***
- ***Name / brand of the food***
- ***Contact information of the producer***
- ***Lot number / date of manufacture, if perishable***
- ***The weight or liquid volume***
- ***Information about the intentional use of additives***
- ***Information about artificial flavouring and colouring***
- List of ingredients
- Any warnings or similar required by specific technical regulations (e.g. “Contains gluten” or “does not contain gluten”; “contains <allergen>”<sup>40</sup>)
- Country of origin
- Contact information for the importer
- Expiration date
- Care and handling information
- Instructions for use and preparation
- Nutritional information (see below)

Depending on the product, it is possible that other information is also required by specific technical regulations. The first seven items in the list (in ***bold italic***) are, according to Decreto-Lei 986/1969, required to be on the main label panel (along with the registration number of the food, in the cases this is necessary; and also with nutritional warnings / front of pack labelling for certain products - see below). The rest of the information can be on the back.

For ***alcohol***, labels must also contain:

- Percentage of alcohol content
- The warning: “Avoid excessive consumption of alcohol”.

The label must be in Portuguese. The use of a sticker is allowed as long as the sticker contains all the required information.

With regards specifically to ***nutritional information***, the legislative requirements changed in 2020, with a complicated phasing-in timetable which generally depended on the date of manufacture and company size (smaller companies generally have until October 2024). However, for imported products, any product manufactured after October 2023 must comply with the new regulation (and it is advisable to now comply with the new regulation regardless of date of manufacture).

Nutritional information must be displayed in tabular format (black text / white background with legibility criteria; and it must be in clear, easy to read areas and uninterrupted – in brief, nutritional information must be highly accessible to consumers.<sup>41</sup>

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<sup>40</sup> Allergens to list are: wheat, rye, barley, oats and their hybridized strains, crustaceans, fish, eggs, peanuts, soy, milk of all species of mammals, almonds, hazelnuts, cashew nuts, Brazil nuts, macadamia nuts, pecans, pine nuts, chestnuts, natural latex. Any of the above substance must be listed if it is detectable.

<sup>41</sup> There are some exception for labels with an overall size of 100cm<sup>2</sup>.

- Energy value (kcal)
- Carbohydrates (g)
- Total Sugars (g)
- Added Sugars (g)
- Proteins (g)
- Total fat (g)
- Saturated fat (g)
- Trans fat (g)
- Dietary Fibre (g)
- Sodium (mg)

This information must be displayed per 100g / 100ml; per serving (with the number of servings in a packet required on the label); and as a % of the recommended daily value.

**Mandatory front of pack nutritional labelling** was also introduced for products with levels of added sugar, saturated fat and sodium are above certain levels. These levels are set out in the table below, based on the annex to normative instruction 75 of 2020:

Nutrient	Level of solid / semi-solid food	Level for liquid food
Added sugar	=> 15g per 100g	=> 7.5g per 100ml
Saturated fat	=> 6g per 100g	=> 3g per 100ml
Sodium	=> 600mg per 100g	=> 300mg per 100ml

For products exceeding these levels, there is a mandatory “*alto em*” (high in) statement, in a box, followed by the nutrients involved. Examples provided by ANVISA are displayed below:

**One nutrient:**



**Two nutrients:**



**Three nutrients:**



Working with importers to ensure label compliance

In view of the evolving legislative landscape and the complexity of labelling legislation, it may be prudent to work on label development with an import partner – hence helping to ensure compliance with all requirements. This is particularly true of animal origin products, the labelling of which must be first registered with MAPA (see <https://www.gov.br/agricultura/pt-br/assuntos/inspecao/produtos-animal/empresario/registro-de-produtos-rotulagem>).

The new labelling regulations also include provisions related to **claims**. Most notably, it restricts the use of claims in the case that there is front of pack labelling (e.g. if there is front of pack labelling for saturated fat, claims for fat, saturated fat, trans fat, or cholesterol are not permitted; similar with other nutrients; and the positioning of claims is also limited if there is front of pack labelling).

### Packaging

A summary of rules for packaging (including an FAQ) can be found at the following link:

<https://www.gov.br/anvisa/pt-br/setorregulado/regularizacao/alimentos/embalagens>

In summary:

- Packaging and food contact regulations are harmonised at Mercosur level. The block uses various regulations as the reference point, including EU and FDA regulations.
- Food packaging is generally exempt from registration, though certain materials (most notably recycled PET used as a food contact material) does require registration.

### Organic

Organic foods must comply with Brazilian legislation governing organic products, and must be certified by a body which is approved by MAPA. Furthermore, foreign producers must be listed in the [national register of organic producers](#). There are different requirements for products depending on whether they are single or multi-ingredient.

The legislation governing organic products can be found at the following link:

<https://www.gov.br/agricultura/pt-br/assuntos/sustentabilidade/organicos/legislacao-organicos> (an English version is provided).

Organic products in Brazil must bear the organic seal (below). There is no organic equivalence agreement between the EU and Brazil. However, some private international certifications may provide paths to the use of the Brazilian organic seal.



There is no government regulated **halal** certification; religious authorities determine which certifications are acceptable.

#### 4.2.4 Protection of intellectual property rights, including geographical Indications (GIs)

The National Institute of Industrial Property (INPI) is the body responsible for intellectual property in Brazil, including geographical indications. **Trademarks** are valid for 10 years and are renewable. More information on trademarks and the application process can be found at the following link: <https://www.gov.br/inpi/en/services/trademarks/basic-guide/basic-guide>

There is a database of trademarks which can be searched. This is available at: <https://busca.inpi.gov.br/pePI/>

**Geographical indications (GIs)** and their regulation are defined in the Brazilian Industrial Property Law (No. 9279 of 14<sup>th</sup> May 1996). This law defines GI as indications of provenance or as denominations of origin.

INPI has a website, in English, with more information on GIs and on the registration process:

<https://www.gov.br/inpi/en/services/geographical-indications/basic-guide/basic-guide>

Lists of protected GIs (and applications in progress) can be found at the following link:

<https://www.gov.br/inpi/pt-br/servicos/indicacoes-geograficas/pedidos-de-indicacao-geografica-no-brasil>

There are several protected European GIs on the denomination of origin list.

The EU Mercosur free trade agreement which is being negotiated at present would, if successful, likely result in around 350 EU GIs being protected in Brazil. Some GIs could however be grandfathered due to their local usage (e.g. Parmesao, Gorgonzola, Gruyere, Fontina, Grana Padano, Steinhaeger). It must, however, be emphasized that this is a future development which depends upon the FTA being agreed.

##### **Some IPR related considerations**

Some GIs may have challenges in Brazil due to their usage on local products. Some of the most notable ones have already been identified above, though indications from the EU-Mercosur FTA negotiations are that up to 50 GIs could be contentious across the block (with different options such as phasing out and grandfathering discussed for these). In addition to those listed above, other notable GIs which may face challenges include champagne, for which the company Peterlongo<sup>42</sup> has the right to use the term under a law which dates from over 40 years ago; though sales of Peterlongo champagne are understood to be quite small.



Counterfeiting has been flagged as a general issue in Brazil.<sup>43</sup> While this primarily affects non-food and beverage products, there have been some indications that spirits (both domestic and imported) can be affected by this issue to a limited extent.

While no other major IPR related problems specific to food and beverages have been observed in Brazil at the time of writing (beyond the GI specific ones noted above), trademark squatting is understood to be fairly common for trademarks more broadly. Against that background, it may be worth registering trademarks early (prior to market entry) to avoid subsequent problems.

<sup>42</sup> <https://loja.peterlongo.com.br/>

<sup>43</sup> See e.g. [https://policy.trade.ec.europa.eu/news/commission-releases-its-report-intellectual-property-rights-third-countries-2023-05-17\\_en](https://policy.trade.ec.europa.eu/news/commission-releases-its-report-intellectual-property-rights-third-countries-2023-05-17_en)

## 4.2.5 Relevant authorities for IPR and GI protection and further contacts

<p><b>General IP, including trademarks</b></p> <p>National Institute of Industrial Property (INPI)</p> <p>Headquarters: Rua Mayrink Veiga, 9, Centro, Rio de Janeiro - RJ (CEP 20090-910)</p> <p> <a href="https://www.gov.br/inpi/en">https://www.gov.br/inpi/en</a></p> <p> +55 21 3037-3000</p> <p> <a href="mailto:sepex@inpi.gov.br">sepex@inpi.gov.br</a></p>
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## 4.3 International trade

### 4.3.1 Brazil and foreign trade

The economy of Brazil is heavily tied to foreign trade owing to its large agricultural sector combined with the country's large manufacturing and raw mineral extraction bases. Brazil's foreign trade accounted for around 39.2% of its GDP, with Brazil's main trading partners being China, the US, the EU, and other Latin American countries<sup>44</sup>. Brazil is a member of the Mercosur trading bloc along with Argentina, Paraguay, and Uruguay (Bolivia was approved for full membership in 2023). Mercosur has its own regional standards organisation and issues its own harmonization standards that each member state must ratify. The EU is the second largest trading partner of Brazil, accounting for 18.35% of its total trade.<sup>45</sup>

### 4.3.2 Key trade agreements, present, and future

Brazil, as a member of Mercosur, has entered into free trade agreements (FTAs) and bilateral agreements with several countries, as outlined in Table 4-3.

**Table 4-3: Chronological list of Brazilian trade/economic agreements with third countries/regions**

Partners	Type of agreement	Entry into force
<b>Mercosur</b> ( <i>Argentina, Paraguay, Uruguay</i> )	Regional trade bloc	1985
<b>Chile</b>	Free Trade Agreement	1996
<b>Southern African Customs Union</b> ( <i>Botswana, Eswatini, Lesotho, Namibia, South Africa</i> )	Free Trade Agreement	2000
<b>Mexico</b>	Preferential Trade Agreement	2002
<b>Andean Community</b> ( <i>Bolivia, Colombia, Peru, Ecuador</i> )	Associate member (free trade)	2004
<b>India</b>	Preferential Trade Agreement	2004
<b>Israel</b>	Free Trade Agreement	2007
<b>Egypt</b>	Free Trade Agreement	2010
<b>Singapore</b>	Free Trade Agreement	2023

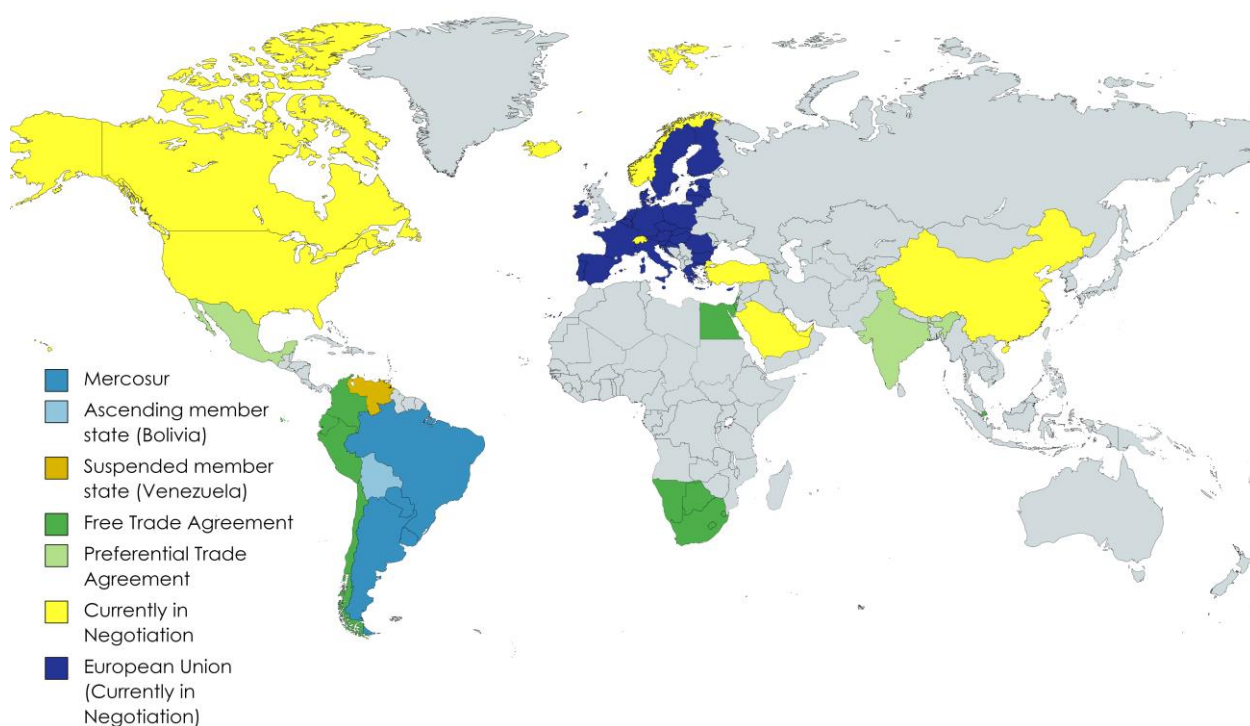
<sup>44</sup> Brazilian foreign trade in figures, Santander, Available at <https://santandertrade.com/en/portal/analyse-markets/brazil/foreign-trade-in-figures>

<sup>45</sup> Brazil-Trade, DG Trade (EU Commission), Available at [https://policy.trade.ec.europa.eu/eu-trade-relationships-country-and-region/countries-and-regions/brazil\\_en](https://policy.trade.ec.europa.eu/eu-trade-relationships-country-and-region/countries-and-regions/brazil_en)

Source: Agra CEAS based on various sources

As a member of the Mercosur, Brazil has taken a more proactive role in seeking FTAs, and these agreements have increasingly been viewed as boosting economic growth. The FTAs that Mercosur is currently negotiating include:

- Mercosur- EFTA FTA (*Likely to enter into force in the near future*)
- Mercosur – EU FTA
- Mercosur- China FTA
- Mercosur- US FTA
- Mercosur- GCC (Gulf co-operation council) FTA
- Mercosur- Canada FTA
- Mercosur- South Korea FTA
- Mercosur-Türkiye FTA



### 4.3.3 EU - Brazil Trade Relations

Brazil-EU trade relations are currently heavily tied to a potential free trade agreement between the EU and Mercosur, which would represent the largest such free trade agreement struck by both the EU and Mercosur. Talks regarding a free trade agreement commenced in 1999 but largely stalled until once again gaining momentum in 2016. The EU is already the largest trading partner of Mercosur as a whole, with an estimated 20% of Mercosur’s exports going to the EU in 2022. Currently, negotiations continue between the EU and Mercosur regarding a free trade agreement, and while challenges remain, there are hopes that one can be concluded in the fairly near future.

### 4.3.4 WTO disputes and other trade barriers

While negotiations between the EU and Mercosur regarding a potential free trade agreement have helped to highlight and address several trade barriers within the trade of agricultural products between Brazil and the EU, there remain several barriers that have yet to be resolved



that may present challenges for EU agri-food exporters aiming to target the Brazilian market. A full list of these trade barriers is outlined below.

### ***Backlog of market access applications – products of animal origin***

The competent authority of Brazil responsible for food safety, the Ministry of Agriculture, Livestock, and Food Supply of Brazil (DIPOA/MAPA), is in the process of reducing the backlog of pending applications. MAPA has allowed EU member states without pre-listing to add their establishments to their existing lists of approved establishments (this was allowed until the end of 2017) without having to be audited by MAPA beforehand. MAPA has indicated it may perform audits at a later stage. This backlog of applications, however, has resulted in new establishments from the EU wishing to export to Brazil having to use bilateral certificates and send official stamps to MAPA, which results in undue delays and the lack of a swift pre-listing approval period, and heavily impacts trade in affected agri-products between the EU and Brazil. EU member states wishing to add a new establishment for exports into Brazil should wait first for a mission to be carried out on the spot by Brazilian competent authorities (MAPA), which results in undue delays and a cumbersome administrative process. It should also be remembered that individual products and labels for products of animal origin have to be registered, and this can also lead to delays. It has been reported that it is common to receive notifications about non-conformities in the registration of products and labels; which in turn can lead to further delays as resolution tends to also involve the authorities in the country of origin as well.

### ***Backlog of market access applications – Plants and product of plant origins subject to pest risk analysis (PRAs) (undue delays by Brazil)***

Pest Risk Analysis (PRAs) performed in Brazil are known to be quite slow, with some applications being submitted up to ten years ago. It has been reported that MAPA performs around 10 PRAs per year across the entire world. This presents an issue as PRAs are the main phytosanitary pre-requisite required to export plant products to Brazil without a previous history of export. This remains an ongoing issue, although there are signals that MAPA intends to speed up and accelerate the process of carrying out PRAs in the short term.

### ***Import ban of pork meat and products of certain origins on African swine fever grounds***

There is currently a temporary suspension on the importation of swine products from Germany (except natural casings) until the German veterinary authorities provide MAPA with epidemiological information on any declaration of a disease-free zone in Germany. This ban further demonstrates that Brazil does not, as a general rule, apply the regionalization principle of the WTO and OIE.

### ***Burdensome regulation on allergenic ingredients labelling in foodstuff products.***

The Brazilian Agency for Sanitary Control (ANVISA) adopted a new regulation on allergenic labelling in food products in July 2015 (which came into force in July 2016). This new requirement is mandated for foodstuffs, beverages, additives, and ingredients used in food processing. Products containing cereals (wheat, rye, barleys, oats, and hybrids), any type of crustaceans, eggs, fish, peanuts, soya, milks, almonds, cashew nuts, Brazil nuts, macadamia nuts, walnuts, pecan nuts, pistachio nuts, pine nuts, and chestnuts shall need to be labelled with the warning message “*Algericios: Contem*” + the ingredient. While the allergenic labelling requirements remain a potential challenge, the regulation has subsequently been updated by RDC 727/2022; and it is understood that, with the initial introduction of allergen labelling being so long ago, existing exporters have adapted to the requirement and the subsequent successor.

### ***Discriminatory taxation of some spirits***

Brazil introduced a tax reform in 2022 that set an excise (IPI) tax rate of 16.25% ad valorem for cane-based spirits (including cachaca). All other spirits are taxed at a rate of 19.5%, which

results in imported spirits being subjected to a higher tax rate than the popular domestic spirit. Sparkling wine classification has historically caused the same challenge for some imported sparkling wines. It should be noted that Brazil's tax system is undergoing a reform with various taxes being integrated into a single VAT style tax; and certain sectors such as alcohol subject to be subject to specific taxes (more information is provided in section 4.4.3). The likelihood is, however, that the status quo in the case of spirits (discrimination slightly favouring cachaça) is likely to continue.

A further related noteworthy point is that, while not discriminatory, the accumulated taxes on imports of alcoholic beverages, when combined with other factors, can result in retail prices to consumers being several times the comparable retail price in origin. The ultimate outcome of the aforementioned tax system review will determine the extent to which taxes impact the retail price of alcoholic beverages.

### **Quality requirements for wine**

In 2015, Brazil opened up a consultation on draft standards of identity and quality of wines and grapes that diverged from OIV and EU standards on a number of parameters. Some EU wine exporters – primarily of sparkling wines – have expressed concerns regarding serious disruptions to trade due to the long list of analytical parameters and their divergences with OIV recommendations. The number of tests required by Brazilian authorities for products exported from the EU may be considered excessive by some EU exporters and stakeholders. Depending on the outcome of the EU-Mercosur trade agreement, these test requirements may simplify in the future.

It should be noted that there is expected to be a review of drinks of fruit and vegetable origin, ultimately resulting in a new framework law (and a modification of wine legislation). Given the evolution of the domestic wine industry (see section 5.4.3), it is possible that the quality requirements will become less troublesome and closer to OIV standards. However, this remains uncertain until the review and new framework law are concluded.

Finally, it should be noted that there is a project for a law in the Brazilian congress which could result in a ***ban on foie gras***. However, at the time of writing this law remains only a project so there is no ban yet in effect.

**Further information, as well as an up-to-date list of trade barriers, can be found here:**

[Barrier's results page | Access2Markets \(europa.eu\)](#)

## 4.3.5 Summary of key trade barriers

The key barriers currently in place within the agricultural trade between the EU and Brazil relate to the backlog of applications with the Brazilian competent authorities coupled with the burdensome administrative process for some products to gain approval to export to Brazil. Brazil has further introduced some regulatory standards, (particularly for alcohol beverages) which are different from EU ones and in some cases, also from international norms, and these may place additional challenges in the way of EU exporters seeking to enter the market. It is hoped that many of these issues will be at least partially addressed upon the adoption of an EU-Mercosur free trade agreement, which, as mentioned, remains under negotiation.



## 4.4 Operating in the Brazilian food and beverage market

### 4.4.1 Logistical services and transportation infrastructure

As the largest country located in South America by a considerable distance, Brazil is the key logistics and transportation hub of the entire continent, with the country bordering every other South American state except for Ecuador and Chile. Brazil, however, has a number of hurdles that hinder the mass development of public infrastructure projects, such as the topography of the country. For example, the vast majority of transportation infrastructure is based along the coast of Brazil, given that the country's population and economic core are based in this area. As a result, the west of Brazil and, to an extent, the north of Brazil are less served by public infrastructure, which makes it additionally difficult to send goods to these regions. Further, the borders between Peru, Colombia, Venezuela, Guyana, Suriname, and French Guyana are lightly connected at present, which makes cross-border trade between these countries' borders limited. This is largely due to the presence of the Amazon rainforest.

#### **Careful consideration of port of entry and possible delays in some ports**

Given the massive size of the country and related challenges with internal logistics, it is important for exporters to carefully consider the port to which they send goods. Ideally, this port should be as close as possible to the targeted market within Brazil. It should be noted that some ports (primarily the largest ones in the south) can, from time to time, be heavily congested, leading to delays in unloading. Indeed, delays of up to two weeks have been reported; with adverse weather, stakeholder strikes and general backlogs three of the more common reasons for such delays. Local partners should be able to advise on the current status of delays at ports, if any.

### **Shipping**

Shipping is a key method of exporting freight to Brazil given that most of the country's major urban settlements are either located on the coast or within the proximity of the coast. Brazil also has a large western coastline of around 7 500 kilometres, which helps facilitate the trade of freight to the country via shipping. The largest port in the country regarding the handling of container freight is the Santos port (Porto de Santo) located in the city of Santos in the state of Sao Paulo; the second largest port is the port of Paranagua located in the city of Paranagua; the third largest port is the port of Navegantes in the city of Navegantes; the fourth largest port is the port of Rio Grande in the city of Rio Grande; and finally, the fifth largest port is the port of Itapoa. There are also various other ports further north (e.g. Santarém, Recife) though these are more geared to bulk freight.<sup>46</sup>

<sup>46</sup> Ranking of Brazilian ports and Plate/ Jan to Nov/ 2020-2021, DataMar News, Available at [Ranking of Brazilian Ports and Plate | Jan to Nov | 2020 - 2021 - DatamarNews](#)

**Figure 4-1: Main ports in Brazil**



Source: Agra CEAS

**Air freight**

Air freight is growing in Brazil with the largest current company in the Airfreight space of Brazil being Azul, followed by LATAM, Sideral and Absa<sup>47</sup>. The use of air freight to transport agri-food products to Brazil is relatively small compared to other methods of transportation although within larger internal urban centres such as Manaus it is more common compared to cities located along the coast of Brazil. The largest cargo airports in Brazil are Sau Paulo Guarulhos airport, Sau Paulo Congonhas airport, Brasilia international airport, Viracopos international airport and Santos Dumont airport in Rio De Janeiro.

<sup>47</sup> Distribution of the domestic air cargo market in Brazil between April 2020 and March 2022 by airline, available at <https://www.statista.com/statistics/1231535/brazil-domestic-cargo-airlines/>

**Figure 4-2: Major International cargo airports in Brazil**

Source: Agra CEAS based on various

### Rail freight

The majority of rail traffic in Brazil is used for the movement of freight, with the use of trains for passengers being very limited in the country despite having one of the world's largest rail networks. The rail network of Brazil is located entirely along the western coast of the country and, to an extent, on some lines that run in the centre of the country. The use of rail to transport agricultural products / commodities is common, particularly sugarcane and dried vegetables. Currently, rail freight accounts for around 15% of freight shipping in Brazil.<sup>48</sup>

### Road Freight

Freight transportation via road is the main method of freight transport within Brazil, with this method accounting for 65% of total freight movement in the country. Road infrastructure is focused along the western coast of Brazil due to this region being the economic and population centre of the country. The main roads of importance include the BR-101 trans-coastal highway, which spans the length of the west coast of the country and connects the major cities of Rio de Janeiro, Vitoria, Salvador, and Natal. Another key highway to mention is BR-116, which also spans the western coast of Brazil but connects instead a different list of cities, such as Porto Alegre, Sao Paulo, and Fortaleza. Road freight becomes more limited in the centre of Brazil, particularly in the northwest of the country, owing to the Amazon rainforest.

<sup>48</sup> Rail freight production in Brazil: Projecting scenarios in times of global uncertainty, Guimaraes, A, Cuota, A, Lobo, A, (2023) Available at <https://www.sciencedirect.com/science/article/pii/S2210970623000355#:~:text=Road%20represents%20a%20share%20of,to%2086%25%20from%20road%20transport.>

#### 4.4.2 Distribution – retail channel overview

Brazil has the largest consumer market in Latin America and one of the largest consumer markets in the world. The food and beverage market has an estimated value of around EUR 211 billion in 2023 with the market forecast to further grow in coming years. The food and beverage retail market is heavily concentrated along the western coast of Brazil and within certain urban centres located in central Brazil.

Looking at major channels:

**Hypermarkets and Supermarkets:** Brazil has around 91 000 supermarkets located across the country, which attract around 28 million consumers daily.<sup>49</sup> There are several major hypermarkets and supermarkets in operation in Brazil. The largest domestic hypermarkets and supermarket chain is GPA (Companhia Brasilia de Distribuicao), with around 809 retail stores located across Brazil. Other major Brazilian retailers include Extra and BIG Bompreco. There are major international supermarket chains in Brazil with local dedicated operations and headquarters; these includes the Spanish retail chain DIA (737 stores)<sup>50</sup>, French retailer Carrefour (1203 stores)<sup>51</sup> and Dutch retailer Makro.

**Traditional channels:** Traditional small local grocers remain a popular retail chain in Brazil, even if modern retail chains such as hypermarkets and supermarkets are well established in the country. Small local grocers are key food and beverage distribution channels within the interior of Brazil, within local neighbourhoods in larger urban centres, and along the country's vast highways that stretch along the western coast of the country. Most traditional small local grocers are operated by private individuals and families; however, there are several small chains that focus on operating smaller convenience retail stores, such as BR Petrobras “C-Stores” and Oxxo.<sup>52</sup>

**E-commerce:** In 2023, the Brazilian food e-commerce market is estimated to have a retail value of around EUR 839 million, which accounts for around 60.7% of the broader total grocery e-commerce market in Brazil.<sup>53</sup> The five largest food e-commerce platforms currently in operation in Brazil include Carrefour, Casasbahia, Mercadolivre, Cacaushow and Amazon.<sup>54</sup> Food delivery platforms, typically in form of an app, are also increasingly popular in Brazil and often further used to purchase groceries, the biggest current food delivery platforms in Brazil include iFood, HelloFood and James Delivery amongst many others.<sup>55</sup>

**Foodservice sector:** The food service sector in Brazil is large, with an estimated industry revenue value of almost EUR 100 billion.<sup>56</sup> Brazilian social culture heavily favours eating out together, and the full re-opening of the food service sector post-COVID-19 has helped this sector rebound quite quickly in the country. Most food service outlets in the country tend to be

<sup>49</sup> F&B insights Brazil, Anuga, Available at <https://www.anuga.com/blog/f-b-insights-brazil.php>

<sup>50</sup> Number of supermarkets of Grupo DIA in the world in 2021, by country, Statista, available at <https://www.statista.com/statistics/771710/group-day-number-from-stores-in-he-world-by-country/>

<sup>51</sup> Number of Carrefour stores in Brazil from 2014 to 2023, Statista, available at <https://www.statista.com/statistics/722359/number-of-carrefour-stores-brazil/>

<sup>52</sup> A ride through the Brazilian Convenience Store Market, Global Convenience Store Focus, available at <https://www.globalconveniencestorefocus.co.uk/features/brazilian-convenience-retail-market/>

<sup>53</sup> Grocery market in Brazil, ECDB, available at <https://ecommercedb.com/markets/br/food>

<sup>54</sup> Top eCommerce stores in the Brazilian food market, ECDB, available at <https://ecommercedb.com/ranking/stores/br/food?page=1&pagesize=50&specialist=all&currency=USD>

<sup>55</sup> Top 10 Food Delivery Apps in Brazil, Elluminati, available at <https://www.elluminatiinc.com/top-10-food-delivery-app-in-brazil/>

<sup>56</sup> Brazil: Food Service- Hotel Restaurant Institutional, USDA, available at <https://fas.usda.gov/data/brazil-food-service-hotel-restaurant-institutional-5#:~:text=In%202022%2C%20Brazilian%20foodservice%20industry,year%20at%20US%245.2%20billion.>

small, locally owned and operated outlets, although there are several major food chains in operation in the country, such as McDonalds, Subway, and Burger King, to name a few. Most major food service outlet chains tend to be focused within the larger and middle-sized urban centres of Brazil, which tend to be along the western coast of the country.

### 4.4.3 Intermediaries

Partners by for EU exporters tend to vary by end market.

- Overall, the **retail** end market shows the most potential for imported food and beverage products. While the retail end market uses both direct and indirect imports, modern retailer chains (i.e. primarily supermarkets) often import directly. In view of the extra costs of exporting from Europe (e.g. logistics and tariffs) it may be more interesting to deal directly with supermarkets; hence cutting out the middle man and keeping the retail price to consumers a bit lower. Importers do typically charge higher margins when working with exporters compared to supermarkets which import directly; though this can be partly substantiated by the responsibilities they take for stocking, distributing products, and offering extended payment terms to end customers. Due to the country's size, there are a large number of substantial supermarkets, often with regional presence. As well as the business contact database (section 8.5.1) trade shows – the APAS show in particular, which calls itself the world's largest supermarket fair – may be one way of finding potential supermarket partners (see section 8.4 for a list of some trade fairs). Against the background set out above, in numerous cases, this direct import of goods may occur through trading companies. In this setup, one trading company oversees group purchasing for multiple supermarkets (often based in different states or cities within a region, so not in direct competition). The trading company will consolidate the order from the various supermarkets and then import the product with supermarkets typically given a payment period of around 30 days by the trading company. Volume tends to be an important factor when dealing with retailers which import directly. Generally, such retailers will expect volumes to be significant, though they may also be open to one-off or non-regular exports. If an exporter is looking to send smaller volumes, it may be necessary to work with intermediaries (distributors) to get the product onto shop shelves.
- The **food processing** industry is overall a tricky one for exporters, with ingredients most likely to be sourced from within country. That said, there are some niches where items are imported – frozen baked goods being a notable one. Imports may be performed directly by larger food processing companies; or pass through importers and distributors to reach smaller food processing companies.
- For the **food service** industry, imports are most likely to pass through wholesalers and distributors. Only fast food chains and large catering companies are likely to import directly.

There are a couple of nuances by product and exporter size to be aware of:

- For **fruit and vegetables**, the main importers-distributors/agents are located at CEAGESP (*“Companhia de Entrepósitos e Armazéns Gerais de São Paulo”* or Company of Warehouses and General Storage of São Paulo). Distribution often goes from this central warehouse in São Paulo to the CEASAS (*“Centro Estadual de Abastecimento SA”* or State Supply Center SA in the capitals or largest cities of Brazilian States. Importers and distributors at CEAGESP may supply products to large retail chains during periods when these chains cannot meet demand alone. They also supply medium-sized food retailers and fruit and vegetable stores; as well as regional retail and small markets through an indirect network.

- For **wine** (and to an extent other **alcoholic beverages**), there are a few particularly large importers. Examples of these include: The Wine Group (Cantu and Bodegas), Interfood, Casa Flora and La Pastina. Long term contracts (e.g. 10 years) with exclusivity are common with such intermediaries. Some supermarkets do import wines directly; and finally there are several smaller importers which focus importing wines for sale to smaller supermarkets. The first approach (large importers) is the only one which may give wines the possibility of national level recognition; though as will be seen below, in many cases a regional approach for exporters may be preferable to a national one.
- For **smaller exporters**, it is more common for them to work with importers (often small ones specialised in the product, but also in some cases big) rather than directly with retailers. That said, some smaller exporters may choose to supply a supermarket initially as a way of testing the water; and if successful, then move to working with importers to develop a wider / more stable presence.

Due to the size of the country, exporters may work with **multiple partners**. In such cases, if the exporter is targeting more than one state there is often one partner per state. In the case that an exporter is focused primarily on selling their product in one specific state, it is possible that they will work with multiple partners within that state. That said, import partners will often request exclusive or semi-exclusive contracts which impose limitations on distribution within geographic areas and / or restrictions on product lines. As is frequently the case when exporting, care may be needed to ensure the coherence of pricing strategies when working with multiple partners in Brazil.

While there are no **fixed minimum order quantities**, as a general rule (and as noted above), end users such as supermarkets will not import directly unless volumes are significant. Importers on the other hand may be more ready to work with smaller quantities of products to begin with, only ramping up once they see there is market acceptance of the product. This approach helps them to manage their risk. Some importers – larger ones in particular – may work with mixed load containers, with the larger importers helping to consolidate the container load in the country of origin (smaller importers are less likely to provide this assistance). Care must however be taken with this approach, as it can lead to the process for container release being slower. This is an important consideration for any product which is perishable. Perishable products under the control of MAPA and non-perishable products should not share the same container.

Some final tips are:

- In many/most cases is not a good idea to approach the country as a whole. Focusing on individual states / regions (generally those with cities of 1m or more people) tends to be more effective. In such cases, it can be interesting to identify a product-region pairing. Only very large volumes of tested products for which strong branding can be developed are likely to benefit from a national level approach; and in such cases, importers will need considerable levels of stock as well as strong distribution infrastructure across the country.
- While the South and South East tend to be the regions with the markets which appear most attractive at first glance due to large populations, income levels and strong ancestral links to Europe of the population, other markets can offer notable opportunities due to the fact they are underserved. Some hints in this regard were provided in section 2.2.2. Border regions such as those near to Uruguay have also been used by some exporters as target areas for initial penetration.
- As mentioned above, trade fairs can be an effective way of identifying potential partners.
- It is prudent to thoroughly assess the suitability of potential partners, considering factors such as their operational history, legal standing, ownership structure and if



possible, financial stability. This may help in avoiding unreliable companies and / or those with insufficient resources to promote or distribute products.

- Brand building and market positioning are important in Brazil; they lay the ground for sustained success and market differentiation. Brands which are already internationally recognised may have an advantage in this regard when entering the market, but in all cases it is necessary to continue brand building.
- In some categories, such as olive oil where established brands already saturate the market but there is also a focus on price, it may be worth explore opportunities for private label products.

#### **Tax reform in Brazil**

A tax reform in Brazil was approved in December 2023 and is scheduled for implementation from January 2026. It involves the creation of dual VAT and the elimination of five federal and municipal taxes. There will be a third tax - a Selective Tax - which will be levied on goods and services that are harmful to health or the environment, with this scheduled to enter into force in 2027.

Full information on the reform can be found at the following link (in Portuguese): <https://www.camara.leg.br/internet/agencia/infograficos-htm15/ReformaTributaria/index.html>

Actors in Brazil, including importers, are likely to spend the 2024-2025 period acquainting themselves with the dynamics of the new taxes. There may, of course, ultimately be impacts on products sent by exporters (and hence potentially exporter strategies); but this is unlikely to become clear until Brazilian actors themselves have understood and adapted to the new regime.

#### **Business Contact Database:**

A database of importers, wholesalers, retailers and distributors can be found in section 8.5.1

*N.B. due diligence will have to be performed for any contacts on this database as no warranty is given as to the standing of these individuals, organisations or firms and no corresponding responsibility or liability is accepted by the authors.*

#### **4.4.4 Business environment**

The large market in Brazil offers significant opportunities for EU producers due to the country's large and diverse population, changing consumer preferences, and growing middle class. The demand for premium and specialty products is rising, as are the number of retail chains that are focusing on the sale of these products. There is a growing awareness and appreciation for quality EU products in Brazil, which presents a market that has many opportunities. Navigating the regulatory environment via compliance with local food safety and labelling regulations, coupled with understanding the ANVISA (National Health Surveillance Agency) requirements, import restrictions, and customs procedures, is vital to ensuring seamless market entry for EU food and beverage products. Brazil has a well-established distribution network with a mix of traditional and modern retail outlets and coupled with the rise of food e-commerce retailing in recent years, EU producers should seek out local distribution and retail partners as well as multinational food and beverage retail operators in Brazil to optimize their chances of succeeding in the Brazilian market.

#### 4.4.5 Key operational considerations and challenges: summary

There are several key operational considerations and challenges that should be considered in Brazil. First, the business language of the country is Portuguese. The Portuguese spoken in Brazil, while naturally extremely close to the Portuguese spoken in Portugal, also has local variants and sayings that can be tricky to navigate in a social setting. However, having somebody present who can speak Portuguese of any variety will be sufficient. Spanish is often also spoken by Brazilians to some extent, particularly within business circles, as Brazil is surrounded by Spanish-speaking nations and has an economy heavily tied to the rest of Latin America, which is largely Spanish-speaking except for very few nations such as Suriname and Guyana. English proficiency in Brazil is very low, even by Latin American standards. For this reason, it is vital to have someone who speaks Portuguese present to translate during meetings if you yourself cannot speak Portuguese. There are small circles of the population that can speak Italian and German; however, unless directly dealing with these communities, it is unlikely that these languages will be of much aid in negotiating with potential Brazilian partners and clients.

Another key consideration is the sheer size of Brazil and the pockets of heavy population density centres that are located along the western coast of Brazil. Indeed, Brazil is a country of many contrasts; for example, Sao Paulo is the most densely populated city in Latin America, which is contrasted by north-western Brazil, which is one of the least densely populated regions in the world. For all practical purposes, EU producers are extremely likely to be dealing with clients and partners based along the western coast of the country, or to an extent, central Brazil. Still, this coastal region is huge, with the western coastline alone stretching for 7 500 km.

Economically, the Brazilian real currency is subject to currency fluctuations, which may or may not swing in the favour of an EU producer. While this is common in third-country markets for EU producers, it still should be noted as a key operational challenge regarding pricing strategies and overall profitability.

Overall, it is important to appreciate the sheer size of the country and market, and to tailor strategies accordingly. By establishing key relationships with producers in operation within the larger urban centres of Brazil, one may be better positioned for succeeding in the Brazilian market. A key strategy may be focusing on urban centres (particularly the urban centres discussed in 2.2.2) As the size of Brazil as a whole can make operating nationwide financially challenging (this is also true for domestic producers in Brazil), by first targeting larger urban centres such as Sao Paulo (12 million people), Rio de Janeiro (6.7 million people), or Brasilia (4.7 million people) may prove a more effective entry method.

#### **Methods of payment in Brazil**

The currency of Brazil is the Brazilian Real (BRL), which is legally the sole currency accepted within the country. Unlike in some other Latin American countries, USD is rarely accepted in Brazil, with the exception of only the very high end of retail chains or hotels; and Euros are not accepted at all in the country. At most ports of entry into Brazil, particularly within larger urban centres, there will be a vendor or kiosk available to exchange major currencies (USD, GBP, and EUR) to BRL, which will be vital for paying for goods and services in Brazil. There have been suggestions that Mercosur may launch a common currency often touted to be called the "sur," but at the time of writing, these developments remain largely in the initiation stage.

Major credit cards, such as Visa and Mastercard, are accepted in Brazil and can be used to withdraw money from ATMs, which are plentiful in the country. Paying electronically via



platforms such as Revolut is increasingly common in the country but still limited and ultimately more acceptable in larger urban centres.

Figure 4-3 below is the EUR-BRL currency exchange rate for the past five years (January 2019– January 2024). This graph highlights the levels of fluctuation that occur in the currency exchange rate. During this period, the exchange rate ranged from 1 EUR = 405 BRL in April 2020 to 1 EUR = 5.3 BRL in January 2024. COVID-19 and the wider geopolitical situation in the region and its influence on Brazil played a key role in currency price fluctuations.

**Figure 4-3: Five-year evolution of the EUR-BRL currency exchange rate: 2018-2023**



Source: XE Currency converters: Euro to BRL exchange rate chart, available at [Euro to Brazilian Real Exchange Rate Chart | Xe](#)

### Travel from the EU to Brazil

Brazil, owing to its cultural and economic ties to the EU, allows all EU citizens visa-free access to the country for up to 90 days for tourism. Brazil has a liberal visa policy system, and it has been proposed that the currently 90-day visa-free entry may be extended to 180-days for EU citizens at some point in the near future. The majority of EU citizens will arrive in Brazil via air travel, with Sao Paulo and Rio de Janeiro being the most popular ports of entry, with direct flights to the EU member states of France, Spain, and Portugal, among others, available.

## 5 Market Snapshots for Selected Products

This section provides specific information for various food and beverage categories and products. This information covers three main categories:

- **Consumption:** data on the evolution of consumption; consumer profiles and any notable consumer trends;
- **Offer:** domestic production; imports and exports; the competitive landscape; relevant specific customs procedures/import considerations;
- **Distribution:** main distribution channels used; domestic and imported offer.

Furthermore, each category contains a SWOT analysis and a key takeaways message.

Fresh Meat	Fresh fruit and vegetables	Dairy
Wine	Spirits	Olive oil
Chocolate confectionery	Beer	Processed meat
Pasta	Processed Fruit and Vegetables	Sugar confectionery
Biscuits / cereal bars	Jams	Baby food

## 5.1 Fresh Meat

### 5.1.1 SWOT analysis

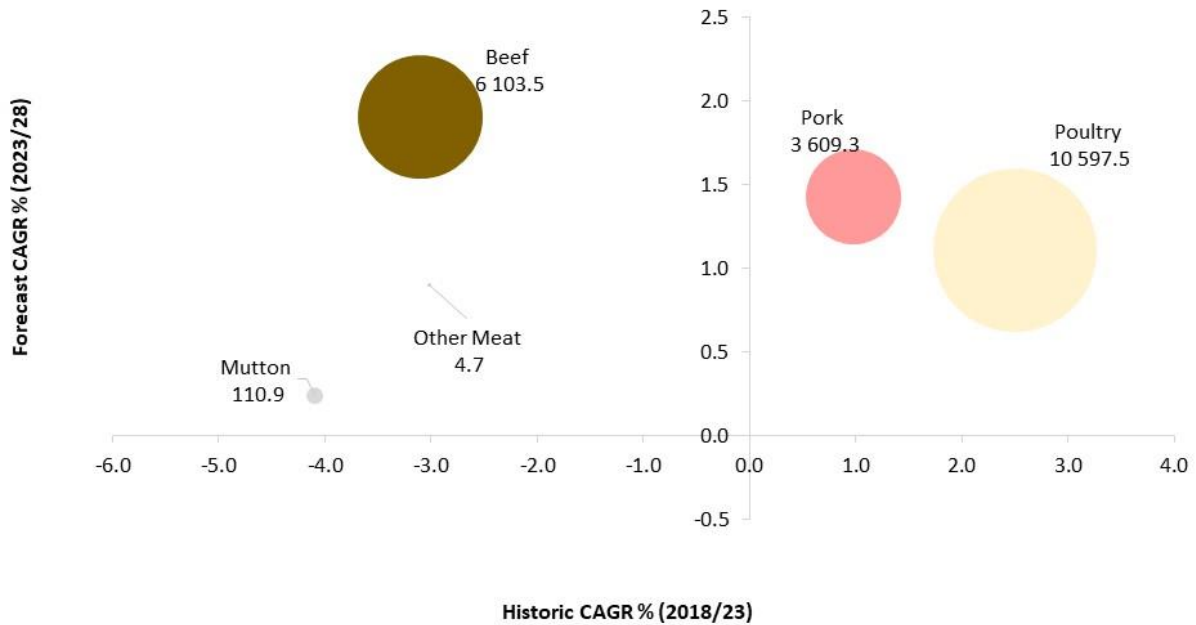
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> <li>▪ <b>High per capita consumption</b> of meat – above the EU level.</li> <li>▪ High <b>demand spread across the three categories</b> of poultry, beef and pork.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Huge domestic production</b> means the country has a self-sufficiency ratio of over 150%.</li> <li>▪ Furthermore, <b>domestic production is both cost effective and high quality</b>, creating a strongly defensible position for domestic producers.</li> <li>▪ Mass market is <b>price sensitive</b>.</li> </ul>
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> <li>▪ <b>A net importer of sheep and goat meat</b>; though this very much remains a niche market.</li> <li>▪ Growing interest in <b>sustainability and animal welfare issues</b> may create niche opportunities if domestic producers fail to react to these trends.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Competing with <b>dominant domestic production</b> – most notably lead by three huge multinational companies.</li> <li>▪ In view of the above characteristics of, it is <b>extremely difficult to compete</b> either on price or on quality.</li> </ul>

### 5.1.2 Consumption

#### Evolution of consumption

Poultry is the largest fresh meat category in Brazil by some distance, with a total market size of 10.6m tonnes in 2023. It grew by 2.5% per year between 2018 and 2023, with forecast growth to 2028 slightly lower at 1.1%. Beef is the second largest market at 6.1m tonnes. While the market shrank in recent years by just over 3% per year, it is forecast to grow by 1.9% per year until 2028. Pork is third at 3.6m tonnes, with a historical growth rate of 1% per year and a slightly higher forecast growth rate of 1.4%. The market for mutton is very small in comparison to the other three categories – just 0.11m tonnes; and the market for other meat negligible (Figure 5-1).

**Figure 5-1: Evolution and forecast of fresh meat market (000 tonnes) in Brazil, 2018-2028; total volume**



Source: Euromonitor International: Fresh Food, 2023.

### Consumers

Meat is widely consumed in Brazil. The average Brazilian is estimated to consume over 90kg of meat per year, with around half of this being poultry. Around 80% of the Brazilian population are estimated to be regular consumers of meat, with around 13% following a flexitarian diet (i.e. occasional consumption) and around 6% not consuming meat. Against this background, meat consumers span all key demographics. The abundance of meat production partly explains the wide consumption; and both the high production and economical features of poultry explain its leading position.

### Drivers and method of consumption

As noted above, poultry is the most popular meat, accounting for roughly half of all meat consumed in the country. This is due to poultry being plentiful and cost efficient. In some areas of the country such as the north east, the direct sales of live chickens – which ensures freshness – is still a fairly common practice; though regulatory pressures and customer expectations are pressuring this practice. Poultry tends to benefit at the expense of other meats when there are economic pressures; and indeed there has been high inflation in recent years alongside a certain level of food insecurity stemming from elevated production costs (partly as a result of global instability. This has in turn benefitted poultry (as well as pork to a lesser extent).

Beef is the second most popular meat in the country. The meat has strong association with abundance and celebration in Brazil; and is generally perceived as satisfying hunger for longer. These factors, along with a general taste preference for beef, make the meat a favourite among Brazilians if they can afford it. However, as noted, above, its consumption

has been under pressure recently due to its higher cost; and consumption of the meat is generally quite highly exposed to the broader economic situation.

Pork consumption lags the other two categories, with most Brazilians having a taste preference for beef and chicken. However, pork consumption is partly driven by economic considerations; and there are parts of the country where there is a slight cultural preference for pork. Consumption of pork is notably higher in regions where there is a higher concentration of production, such as the southern states of Santa Catarina, Rio Grande do Sul and Parana. Finally, there is a slight seasonal slant on pork consumption, with higher levels of consumption during the Christmas and new year period.

### Purchase criteria

As implied above, price is frequently a major consideration for consumers, with price factors driving the recent higher consumption of poultry. Taste is a further major consideration, which explains the preference for beef and poultry over pork; as well as for some more elaborate cuts in the case of wealthier consumers. Availability and freshness are final main factors; Brazil is a large country, and almost all consumed meat is domestically produced. As witnessed by the practise of selling live chickens for slaughter and the higher level of consumption of pork in pork-producing regions, the ready availability of fresh products impacts what consumers ultimately purchase.

In addition to the above, there are subsets of consumers who take into account health factors (which generally favour the consumption of white meat over red); certifications of quality; animal welfare; and sustainability factors.

### Recent market trends

The following trends stand out in the market:

- **Inflation impacting consumer choices.** As mentioned above, inflationary pressures have strongly influenced consumer choices over the last year. While all meats have suffered price increase, the increase for beef and veal has been particularly high due to the higher cost of inputs. This has led to consumers moving away from beef to cheaper chicken and pork; but furthermore has also led to the substitution of beef as a protein source by non-fresh meat alternatives, such as sausages and eggs. The fall in beef consumption has been particularly strong among the poorer in society.
- **Increase in the range of cuts and meats consumed.** There has been increasing interest in alternative cuts and meat. This has primarily favoured the categories of poultry and pork, as consumers try to find attractive substitutes for more expensive beef cuts. Examples include pork shoulder and loin cuts, as well as piglet racks. There is also growing interest in, and production of, turkey meat. Some producers have been suggesting new recipes using different cuts to take advantage of this trend.
- **Increased producer focus on socio-environmental factors.** While meat is highly popular in Brazil, there is increasing interest in meat substitutes, with a certain amount of this interest driven by concerns about sustainability and health issues related to the supply chain of animal meat. In response to this, some producers have been engaging with greater transparency of their production operations as well as with sustainability issues. There is, for example, a carbon neutral meat (*Carne Carbono Neutro*) initiative which some producers are engaging with.

### 5.1.3 Offer

#### Domestic production

Brazil is a huge producer and exporter of fresh meat. Overall, it is:

- The world's second largest producer of poultry meat, and the largest exporter.
- The world's third largest producer of cattle, and the largest exporter of beef.
- The world's fifth largest pig producer.

JBS is the largest company in the Brazilian market as well as the world's largest meat processor. The company – which is originally Brazilian – now operates across the world. While it is difficult to precisely identify its market share in Brazil, it can be estimated at around ¼ of the market; with the company active across all fresh meat types, as well as in the area of processed meat.

BRF is the second largest meat producer in Brazil, with a particularly strong position in the area of poultry within Brazil. While headquartered in Brazil, the company is also highly active in other markets. Marfrig Global Foods SA is the third placed company, with a particularly strong position in beef. Indications are that these top three companies (JBS, BRF and Manfrig) account for in excess of half of all Brazilian meat production.

The competitive cost of production has been a major factor in the development of Brazil's huge meat industry, with corn and soybean – both of which are widely produced in Brazil - particularly important. That said, beef overall is more likely to be grass fed than grain fed – though there is an increasing shift towards grain feeding. In the case of poultry and pork, feed accounts for 75 and 70% of all production costs respectively, making it key.

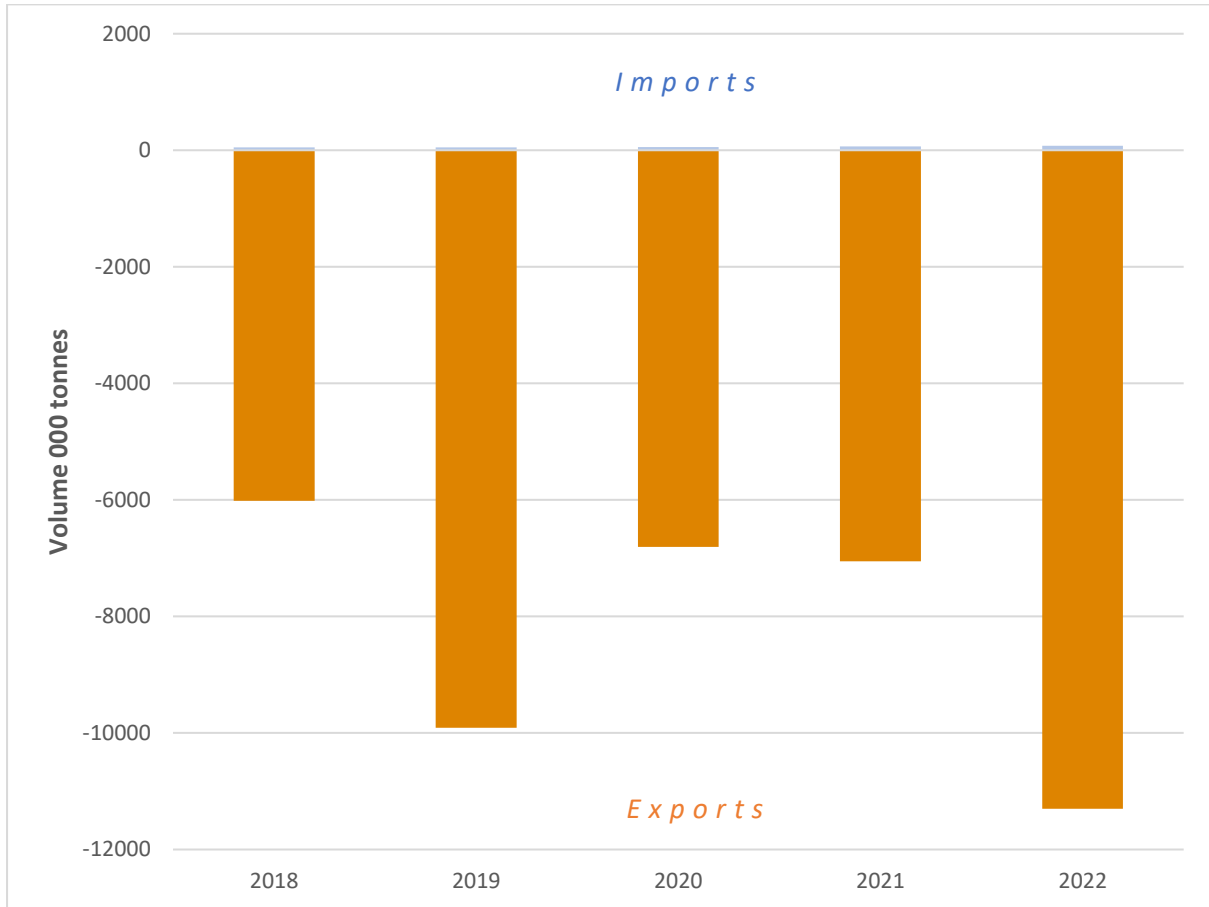
There are notably regional differences in production:

- **Beef** production is focused on a belt going through the centre of the country from south to north; starting in Mato Grosso do Sul, and ending in Para. The four states in this "belt" account for over half of all beef production, with Mato Grosso the largest beef producer at 20% of all Brazilian production.
- **Poultry** production is primarily focused in the South region (about 60% of production) followed by the South East (20%) and centre west (15%). Production in the North and North East regions is very limited.
- **Pork** production is strongly focused in the South region (i.e. the states of Santa Catarina, Rio Grande do Sul and Parana). This small region accounts for 2/3 of all pork production in Brazil; with Santa Catarina the greatest producer of the three and the effective national reference for pork production.

#### Imports and exports

As shown in Figure 5-2, Brazil is a massive net exporter of fresh meat, with negligible imports. Exports were just under 11.3m tonnes in 2023, close to double the 6m tonnes of exports in 2018. Imports in contrast shrink in significance, at around 75 000 tonnes – effectively Brazil exports 150 times the volume of meat that it imports. Imports have steadily grown over the last five years from just under 50 000 tonnes in 2018.

**Figure 5-2: Trade balance (imports and exports) of fresh meat in Brazil, 2018-22; volume 000 tonnes**



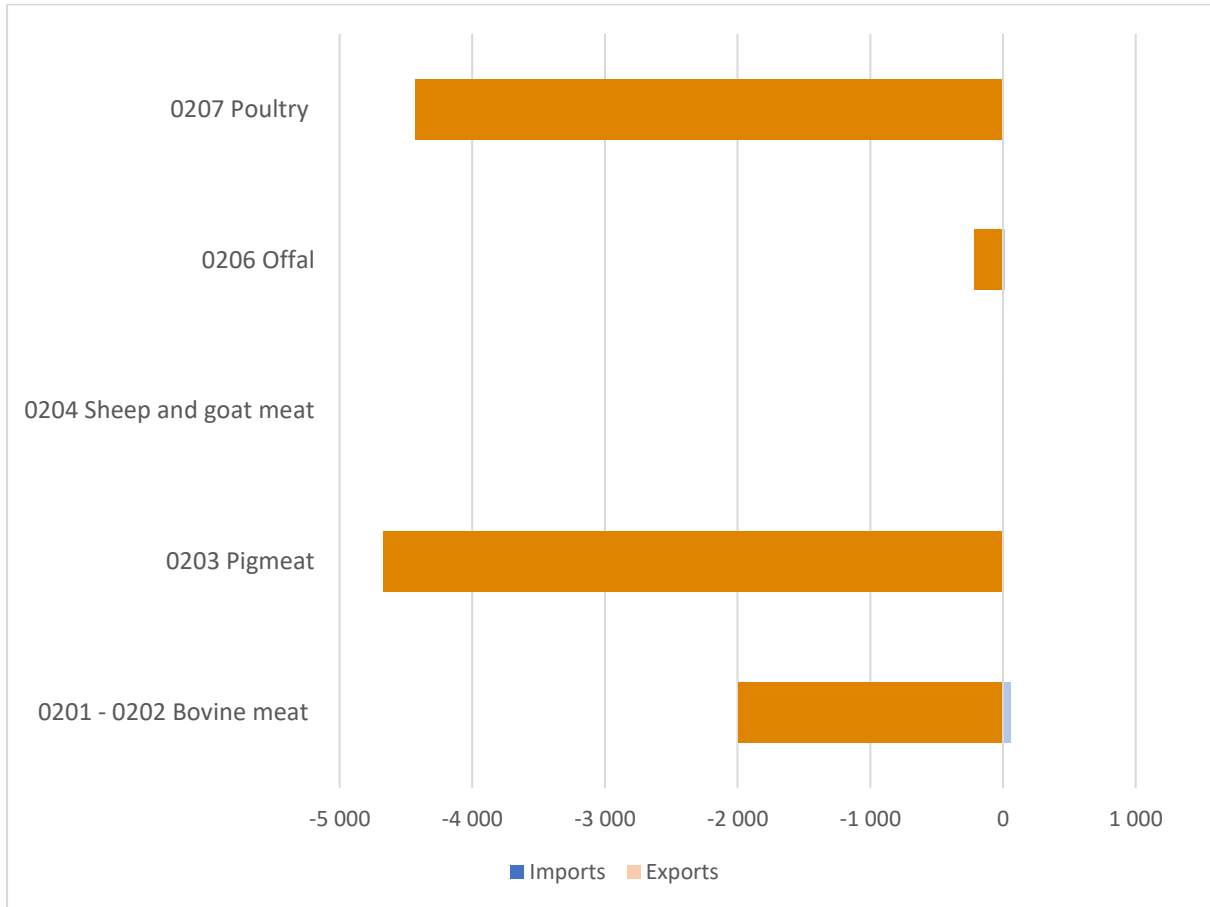
Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 0201, 0202, 0203, 0204, 0206, 0207.

Figure 5-3 shows that Brazil is a large net exports of all types of meat with the one exception of sheep and goat meat, of which it is a net importer with just over 4 000 tonnes of imports compared to near negligible exports. In absolute terms, the greatest volume of imports (some 53 000 tonnes) is accounted for by beef; however the country in contrast exports close to 2m tonnes of beef. Pigmeat and poultry (with volumes either side of 4.5m tonnes) are the main export categories.



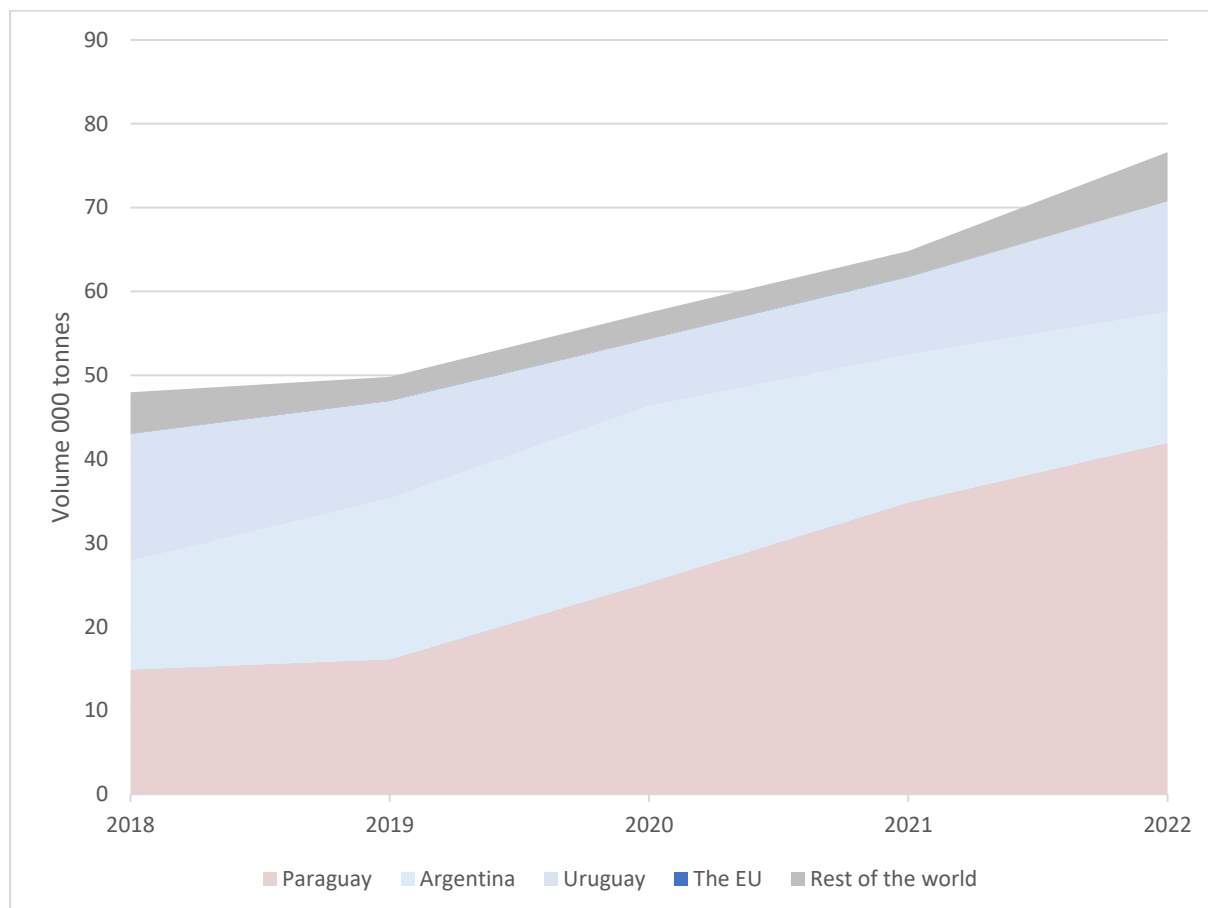
**Figure 5-3: Trade balance (imports and exports) of fresh meat in Brazil, by type, 2022; volume 000 tonnes**



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 0201, 0202, 0203, 0204, 0206, 0207.

Figure 5-4 shows that the small volume of imports is almost entirely accounted for by neighbouring countries – Paraguay (about half of imports), Argentina and Uruguay. EU exports were only 8 tonnes in 2022, down from 53 tonnes in 2021. France accounted for all of 2022 EU exports; while in 2021, France and Poland split EU exports more or less equally.

**Figure 5-4: Brazilian imports of fresh meats by country, 2018-22; volume 000 tonnes**

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 0201, 0202, 0203, 0204, 0206, 0207.

### EU GI products

As noted in section 4.2.4, there is a register of protected GIs. No EU GIs for fresh meat were identified on this list at the time of writing.

### Main competitors

Production is almost entirely from domestic production. Brazil is a massive producer of meat; effectively with a self-sufficiency ratio of over 150%; and the world's largest exporter of two of the three main meat categories (beef and poultry). The country's strong position is grounded in its highly competitive production costs; and the market is dominated by three large multinational companies of Brazilian origin. Only in the small category of sheep and goat meat is the country a net importer.

## 5.1.4 Specific market entry requirements

### Market Access and Entry

The customs procedures for importing foodstuffs are set out in section 4.2.1. A full list of the general documentary requirements for export set out in Table 4-1, along with requirements by product category in Table 4-2. Requirements for fresh meat notably include: a certificate of

analysis; inspection of agricultural products; registration of importers of agricultural products; registration of foodstuffs of animal origin; veterinary health certificate for animal products; and permit to import products of animal origin; with further requirements in certain cases. Establishments need to be approved in order to export meat to Brazil. A searchable list of these is available at the following link:

[https://sistemas.agricultura.gov.br/pga\\_sigsif/pages/view/sigsif/consultahabilitacaoestrang/in dexEstabelecimentoEstrangeiro.xhtml;jsessionid=hrJGlpXDWXKqcJX1r8GbJGkgB6JCSnybq9JNP3JTfHQGT2p9m2NQ!988972512](https://sistemas.agricultura.gov.br/pga_sigsif/pages/view/sigsif/consultahabilitacaoestrang/in dexEstabelecimentoEstrangeiro.xhtml;jsessionid=hrJGlpXDWXKqcJX1r8GbJGkgB6JCSnybq9JNP3JTfHQGT2p9m2NQ!988972512) In terms of tariffs, fresh meat products generally face ad-valorem tariffs of 8%, with only a few exceptions (e.g. 9.6% for certain beef imports).

**Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:**

***Main page – select product, country of origin and destination country:***

<https://trade.ec.europa.eu/access-to-markets/en/home>

***Example link – pig meat category (0203) from Spain to Brazil***

<https://trade.ec.europa.eu/access-to-markets/en/search?product=0203&origin=ES&destination=BR>

## Standards, SPS measures and labelling

Comprehensive information on the legislation relevant to fresh meat, including: technical regulations on the identity and quality, registration requirements and labelling can be found at the following website of MAPA:

<https://www.gov.br/agricultura/pt-br/assuntos/inspecao/produtos-animais/empresario/registro-de-produtos-rotulagem>

It should be remembered that, as set out on that page, products and labels must be registered with DIPOA.

### 5.1.5 Distribution

While no breakdown of the distribution of fresh meat is available, data on the distribution of fresh food more widely is; and this can be considered to be fairly representative of distribution of fresh meat. In 2022, supermarkets and hypermarkets combined accounted for just over half of all fresh food sales in Brazil, with supermarkets the slightly more important channel. Small local grocers, including butchers, account for 30% of sales. The importance of this latter channel has been increasing slightly in recent years, while the importance of supermarkets and hypermarkets has remained flat. The remaining 15-20% is split between various channels – other food and drink specialists, convenience stores, warehouse clubs, non-food retailers, and finally, e-commerce. However, the use of e-commerce for fresh food sales remains very limited, with the channel accounting for only 0.6% of fresh food sales in 2022.

### 5.1.6 Challenges for EU products

The biggest challenge the very tough competition that imports face from domestic production. Brazil is a massive producer and exporter of meat, with the cost effective production (assisted by accessible local inputs) and high quality meat underpinning this position. Furthermore, production is dominated by three huge multinational companies of Brazilian origin. This makes it very difficult for exporters – whether from the EU or from other countries – to compete on the market; and the very low level of imports effectively confirms this. Indeed, the only category

of meat for which Brazil is a net importer is sheep and goat; and the market for this meat type remains very much a niche. In addition, market access adds additional barriers (and hence costs) which further complicate competing on the market.

**Market Takeaway: Fresh meat**

**Consumption:** *high levels of consumption – around 90kg per person per year. Poultry most popular due to price, though there is strong interest in beef due to taste preferences.*

**Competition:** *very strong domestic production, with the country a massive net exporter and cost effective producer across the three main categories of fresh meat.*

**Distribution:** *supermarkets and hypermarkets combined are estimated to account for half of all sales. Local grocers, including butchers, a further 30%.*

**Challenges:** *Extremely tough competition from domestic production across the three meat categories which account for close to 99% of the market. Market access likely to add further costs and challenges.*

**Opportunities:** *Very limited. Only possibilities appear to be the small sheep / goat and other meat markets – the former is the only main category of which Brazil is a net importer.*

## 5.2 Fresh fruit and vegetables

### 5.2.1 SWOT analysis

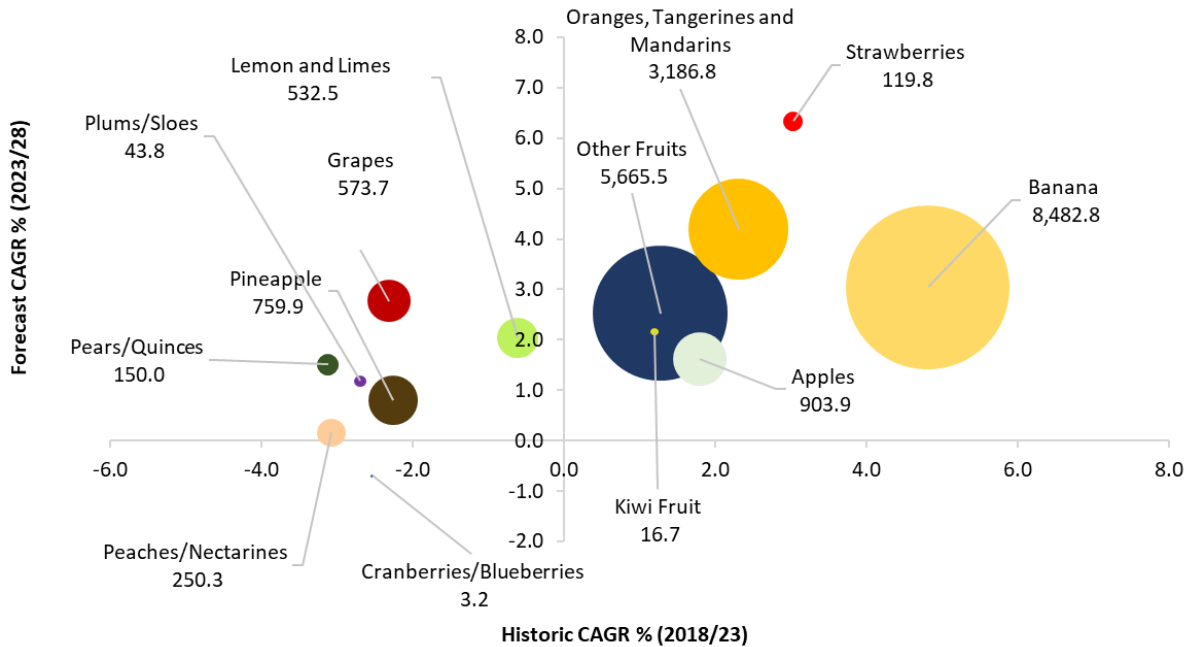
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> <li>▪ Brazil still has a large consumer base with <b>unrealised consumption potential</b>.</li> <li>▪ Brazil is a <b>net importer of fresh vegetables</b>.</li> <li>▪ Both fruit and vegetable markets are <b>forecast to mainly grow</b>, some negative categories in fruits.</li> <li>▪ <b>The EU</b> accounts for over <b>20% of fruit imports</b> and around <b>10% of vegetable imports</b> to Brazil.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Brazil is a <b>large domestic producer</b> of fresh fruit and vegetables.</li> <li>▪ The <b>distance from EU</b> producers to the Brazilian market makes selling EU fresh fruit and vegetables in the country considerably more challenging and/or expensive than domestic or neighbouring fresh fruit and vegetables.</li> <li>▪ Brazil is a <b>net exporter of fruit</b>.</li> </ul>
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> <li>▪ Growing <b>interest in healthy</b> food increases demand for fruit and vegetables, particularly vegetables that can be used also as a meat substitute.</li> <li>▪ <b>Onions, shallots, garlic and leeks</b> are the main imported vegetables. <b>Apples, cherries, strawberries, other berries, and peaches</b> are the main imported fruits. There may be some opportunities for <b>kiwis</b> and <b>citrus fruits</b>.</li> <li>▪ <b>Sustainable produce</b> is in demand as sustainability becomes increasingly important to consumers.</li> <li>▪ <b>Reverse seasonality</b> can create opportunities for some fruit and vegetables which have market access.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Local production</b> of fruit and vegetables is <b>strong</b>, with local products being cheaper than imports.</li> <li>▪ <b>Chile and Argentina</b> are much closer to Brazil and are the leading exporters of fruit to Brazil.</li> <li>▪ <b>Argentina and China</b> are the largest exporter of vegetables to Brazil.</li> <li>▪ <b>Market access</b> for fruit and vegetables can be very <b>challenging</b>.</li> </ul>

### 5.2.2 Consumption

#### Evolution of consumption

The fresh fruit market in Brazil had a size of 20.69 million tonnes in 2023. Figure 5-5 shows that the largest single fresh fruit category in the Brazilian market by volume is bananas (8.5 million tonnes). The other main categories are oranges, tangerines and mandarins (3.2 million tonnes) and apples (0.9 million tonnes). The consumption of most fruit categories is expected to increase between 2023 and 2028. The niche market for strawberries are forecast to grow at the fastest rate with a CAGR 6.3%, followed by oranges, tangerines and mandarins with a CAGR of 4.2%.

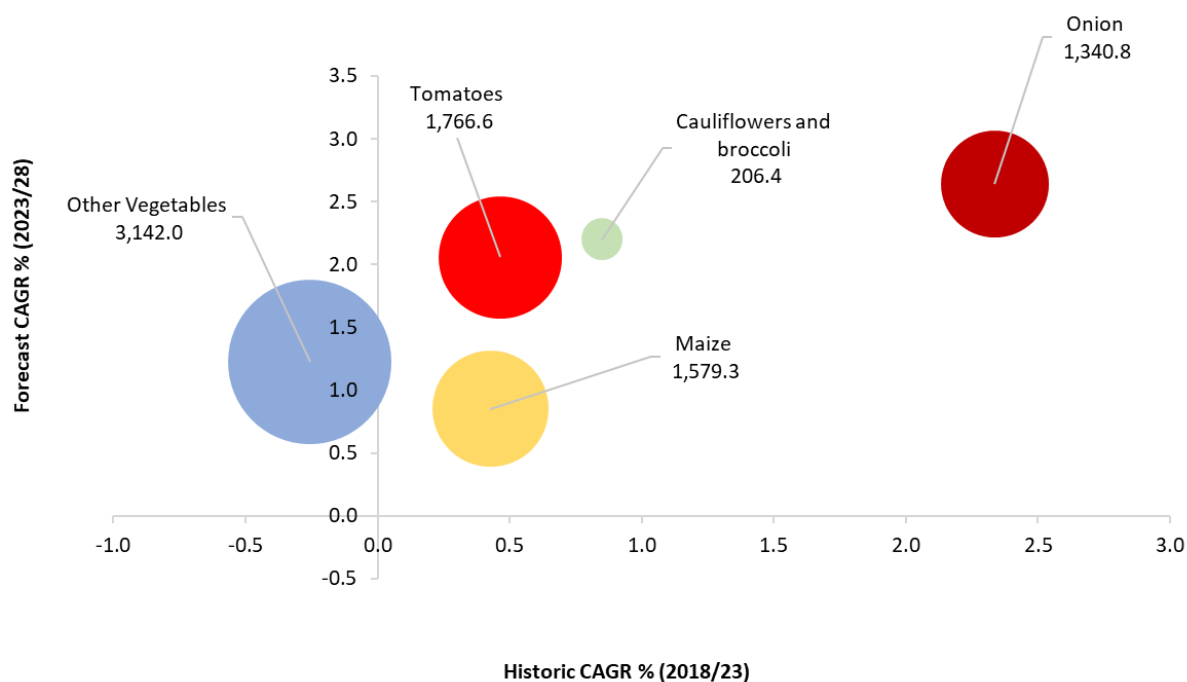
**Figure 5-5: Evolution and forecast of fruits market (000 tonnes) in Brazil, 2018-2028; total volume**



Source: Euromonitor International: Fresh Food, 2023.

The vegetable market had a total size of 8.0 million tonnes in 2023. Figure 5-6 shows that tomatoes and maize are the largest vegetable categories (1.7 million and 1.6 million tonnes respectively). All categories of the market are forecast to grow in the coming years, which has not been the case in previous years. The onion category and the cauliflowers and broccoli category are the smallest but forecast to grow at the highest CAGR's of 2.6% and 2.2% respectively, between 2023 and 2028.

**Figure 5-6: Evolution and forecast of vegetables market (000 tonnes) in Brazil, 2018-2028; total volume**



Source: Euromonitor International Ltd: Fresh Food 2023.

## Consumers

Consumption of fruit and vegetables has been increasing in recent years in Brazil. Consumers of fresh fruit and vegetables in Brazil are diverse and include individuals across various demographic groups. The consumption of fresh fruit and vegetables is widespread among the Brazilian population, and factors such as cultural preferences, regional variations, income levels, and lifestyle choices contribute to the demand for fruits and vegetables. That said, there is generally higher consumption of fruit and vegetables among older demographics and women; with lower consumption among teenagers and men.

While fresh fruits and vegetables are consumed across income groups, purchasing power of may influence the variety and quantity of fruits and vegetables consumers buy. Higher-income individuals may have access to a broader range of produce, including specialty and imported items.

Consumers generally recognise the nutritional value of fruits and vegetables but may not fully comprehend their overall impact on general health. There is an opportunity to enhance the dissemination of information regarding these benefits. The intake of fresh fruits in Brazil remains below the World Health Organisation's recommended levels.

Some consumers stand out as offering large potential for fresh fruit and vegetables. These are vegans, vegetarians and even flexitarians as they are more likely to show an interest due to their limitation of consuming other products and their health consciousness.

Consumers of imported fruit and vegetables are more likely to be:

- Located in the southern region of the country; most notably around Sao Paulo.
- Have higher levels of income and choose to frequently complete their purchases in upmarket grocery stores, speciality markets or gourmet food shops.



- Be interested in higher quality, healthy products; and interested in year round consumption of certain fruits and vegetables.

### Drivers and method of consumption

There are a number of key drivers that help to explain the development of fruit and vegetable consumption in Brazil. The consumption of fruits and vegetables is for example influenced by inflation. As consumers experienced a decrease in their purchasing power, a greater portion of their budgets had to be allocated to essential items, thereby limiting the resources available for the purchase of certain fruits and vegetables. As the cost of vegetables increased, producers quickly observed the consequences of consumers struggling to sustain their usual dietary patterns. However, this is set to change with inflation decreasing again.,

Despite the aforementioned price pressures, rising concerns about immunity have led to steady consumption of healthy foods including fresh vegetables and fruits. Vegetables for example are also increasingly used to replace beef in dishes using beans or other legumes that are perceived to be cheaper and healthier protein and iron options. Particularly flexitarians, vegetarians and vegans are driving this development.

In addition, weather and disease influence the price point of fruit and vegetables. In 2022, Brazilian tomatoes had to deal with an infestation of the tomato pinworm and Brazilian carrots were affected by excessive rains in the main growing area. These unfavourable conditions led to reduced availability and thus also increased the price. Another related driver is availability as domestic fruits and vegetables have growing seasons and are not necessarily available throughout the whole year. Imports are needed during certain periods, and these come with different price points.<sup>57</sup>

Fresh fruits and vegetables are consumed in diverse ways, reflecting the country's rich culinary traditions. Many Brazilians enjoy fruits in their natural state as convenient snacks, while freshly squeezed juices and smoothies, often featuring tropical fruits like oranges and mangoes, are popular beverages. Salads, incorporating vegetables and fruits, are common as both side dishes and main courses. Fruits play a significant role in desserts, such as *brigadeiro* and *beijinho* (traditional sweets made with a base of butter and sweet condensed milk), and are used in pies and cakes. Additionally, vegetables find their way into cooked dishes, grilled preparations, and traditional Brazilian stews. The versatility of fresh fruit and vegetables is evident in their use in salsas, condiments, and preserved forms as well.

### Purchase criteria

Consumers in Brazil prioritise the purchase of fresh fruits and vegetables based on several key criteria. Quality and freshness are paramount, with a preference for produce displaying vibrant colours and firm textures. Price plays a significant role, with affordability being a crucial factor influencing buying decisions, particularly due to the recent inflation. Visual appeal, including uniform size and attractive shapes, is also important. Many consumers appreciate locally sourced and domestically grown produce, considering the origin of fruits and vegetables in their purchasing decisions. Certifications such as organic or sustainable practices are valued by those seeking environmentally friendly options. Packaging, especially minimal or eco-friendly choices, and clear labelling on packaging can impact consumer choices as well. Most consumers purchase their fruit and vegetables unpackaged (95% and 98% respectively).

### Fresh fruit and vegetables on retailers' shelves in Brazil

<sup>57</sup> Euromonitor International: Fresh food, 2023.

It is difficult to generalise about retail prices for fruit and vegetables due to big differences between varieties. However, in very broad terms, price segmentation is as follows:

**Economy:** around BRL 10 (EUR 1.85) per kg

**Mid-range:** around BRL 20 (EUR 3.70) per kg

**Premium:** above BRL 30 (EUR 5.55) per kg



*Above: Fruit and vegetable section of a large north-eastern region supermarket. Products are predominantly sold loose.*

Identifiable imported fruit and vegetables tend to have a low presence on retailers' shelves (under 5% of products) though this can fluctuate a bit depending on the season. Often imported products are found on shelves highlighting premium products, though in other cases (notably if they are targeting the mid-range segment) they are displayed as part of the general fruit and vegetable display alongside standard domestic produce. To give some feeling of the pricing of different imported fruit types:

Imported cranberry, blueberry, and cherries typically retail for BRL 15 / 125g; BRL 30 / 125g; BRL 10 / 100g respectively

Imported pears are found in the range of BRL 20 – 25 / kg



Imported apples and oranges are around BRL16 / kg.

Fruit and vegetables are most commonly sold loose, though some pre-packaged items can be found.



*Above: premium vegetable section of a supermarket; highlighting organic above all. Packaging is more common for this section.*

*Below: imported fruit display featuring Italian kiwis in a Sao Paulo gourmet supermarket.*



Images © Euromonitor International / Agra CEAS, 2024.

### Recent market trends

The government is prioritising sustainability in production practices of fruit and vegetables. This has led to an increased focus from consumers on traceability as well as local sourcing



(see below). There also is a focus on innovation in packaging to improve storage time and lower transportation costs, which also reduces the environmental impact.

Continuing from the above, there has been an increasing emphasis on local sourcing and sustainable production methods. In addition to common fruits like oranges, bananas, melons, apples, and mangoes, Brazil also produces a variety of exotic fruits such as açaí, jaboticaba, and soursop. Although exotic fruits typically do not have strong demand in the local market, jackfruit is experiencing growth due to increased interest in vegan products (given its potential as a protein source). Avocados are gaining popularity but remain pricey for consumers. Grapes are considered a luxury fruit, with consumption closely linked to the population's purchasing power. On the other hand, bananas maintain consistent consumption levels throughout the year, making them one of the most stable fruits in terms of demand. The abundance of fruit options often causes significant fluctuations. Occasionally, new fruit varieties emerge with rapid growth rates, as seen recently with dragon fruit (*pitaya*) production, which was nearly non-existent in Brazil some years ago.

Alongside jackfruit, vegetables that serve as meat substitutes are becoming popular, driven by the growing number of flexitarians, vegetarians, and vegans. Sweet potatoes have also benefited from pushes towards a flexitarian diet, with them being seen as a healthy carbohydrate alternative due to their fibre content and nutritional benefits. They are being consumed in a variety of different ways, such as *coxinha de batata doce* (sweet potato version of chicken drumstick), sweet potato tapioca, sweet potato chips and noodles. Biofortified sweet potatoes are also being developed in the country.

Demand for packaged fruit and vegetables has been growing in recent years, as has demand for imperfect produce. The former has been driven by perceptions of packaged fruit being a higher quality product, as well as by a wish for convenience in the case of packaged pre-cut fruit and vegetables. The latter has been driven by initiatives to reduce food waste. Whereas modern retailers historically have tended to sell aesthetically pleasing fruit and vegetables, products with blemishes have been more likely to be sold in open-air markets, peripheral areas, and other niche markets. However, new methods of distributing this imperfect produce are emerging. Most notably, companies such as Fruta Imperfeita are selling baskets of “ugly fruit” online via a subscription service, delivering it to homes. It is not just the imperfect fruit segment which is using subscription boxes, however. Subscription boxes as a whole have been increasing in popularity, with niches such as organic particularly likely to use this distribution method.

While overall the recent market trends primarily favour local producers, EU producers may be able to play on some of the trends. Examples include through highlighting traceability and emphasizing environmentally friendly production methods.

### 5.2.3 Offer

#### Domestic production

In recent years, Brazil's fruit production, exceeded 41 million tonnes annually on 2.6 million hectares of land. Despite utilising only 0.3% of the national territory, the sector has seen substantial growth.

The Southeast region leads in fruit production, contributing over 50% of the national output. Notable production hubs include the Ribeira Valley in São Paulo, known for bananas, and the Jaíba Project in Minas Gerais, a centre for irrigated banana, Tahiti lime, mango, and papaya. The region also plays a pivotal role in making Brazil the largest global producer and exporter of orange juice, with an approximately 60% market share of world production and around 70%

of international trade. The Northeast region follows as Brazil's second-largest fruit-producing area, contributing 24% to the national fruit production.<sup>58</sup>

Vegetable production in Brazil is a widespread activity, covering the entire national territory. The planted area encompasses around 700 000 hectares, with an estimated production volume of 20 million tonnes. Key vegetables grown in Brazil include tomatoes, potatoes, onions, carrots, garlic, and lettuce.

Notably, vegetable production is expanding in new regions, including Vale do São Francisco, Irecê, and Chapada Diamantina in Bahia; Cristalina in Goiás in the Midwest; and the Triângulo Mineiro and Alto Paranaíba in Minas Gerais in the Southeast. In these areas, the planted area for vegetables has risen by over 35% since the early 2000s.<sup>59</sup>

### Imports and exports

Figure 5-7 shows that Brazil is a net exporter of fruits. Brazil imported a total of EUR 640 million of fruits in 2022 whereas it exported a total of EUR 913 million of fruit. After a decrease of imports between 2018 and 2021, imports increased again in 2022.

On the other hand, Brazil is a net importer of vegetables. In 2022, Brazil imported a total of EUR 376 million worth of vegetables, whereas it exported EUR 147 million worth of vegetables. Vegetable imports increased between 2018 and 2020, followed by a decrease in 2021. However, imports increased again in 2022.

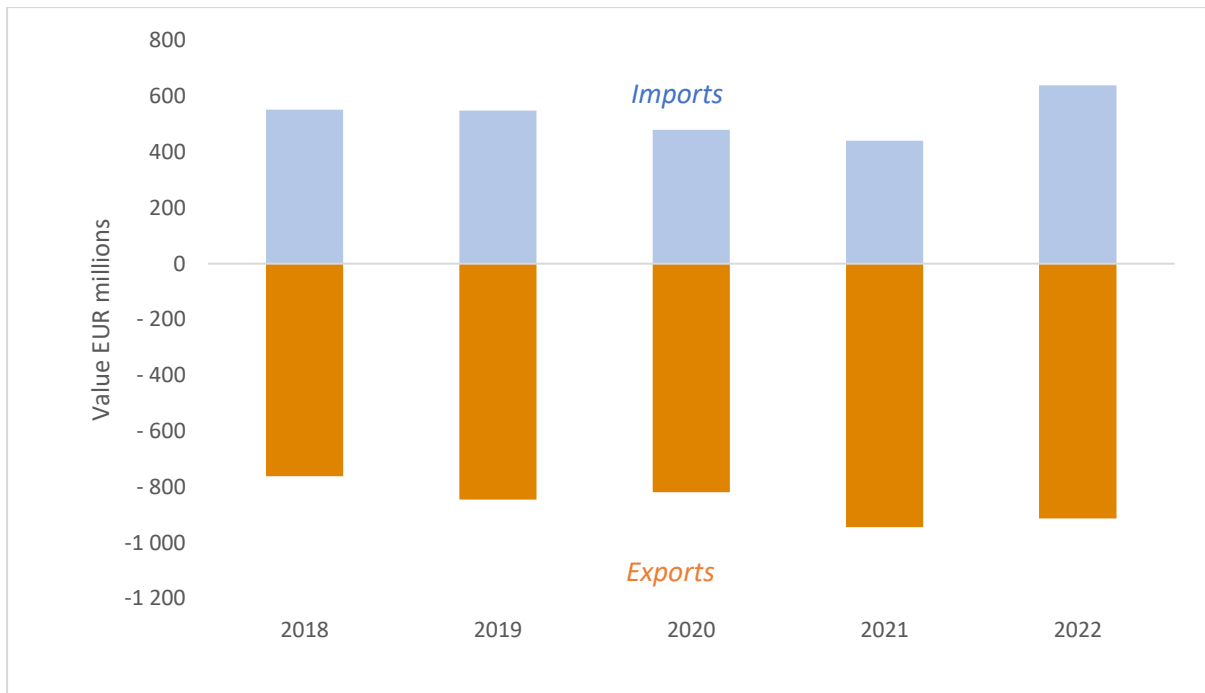
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<sup>58</sup> Brazilian fruit farming: diversity and sustainability to feed Brazil and the world (2022), <https://brazilianfarmers.com/news/brazilian-fruit-farming-diversity-and-sustainability-to-feed-brazil-and-the-world/>

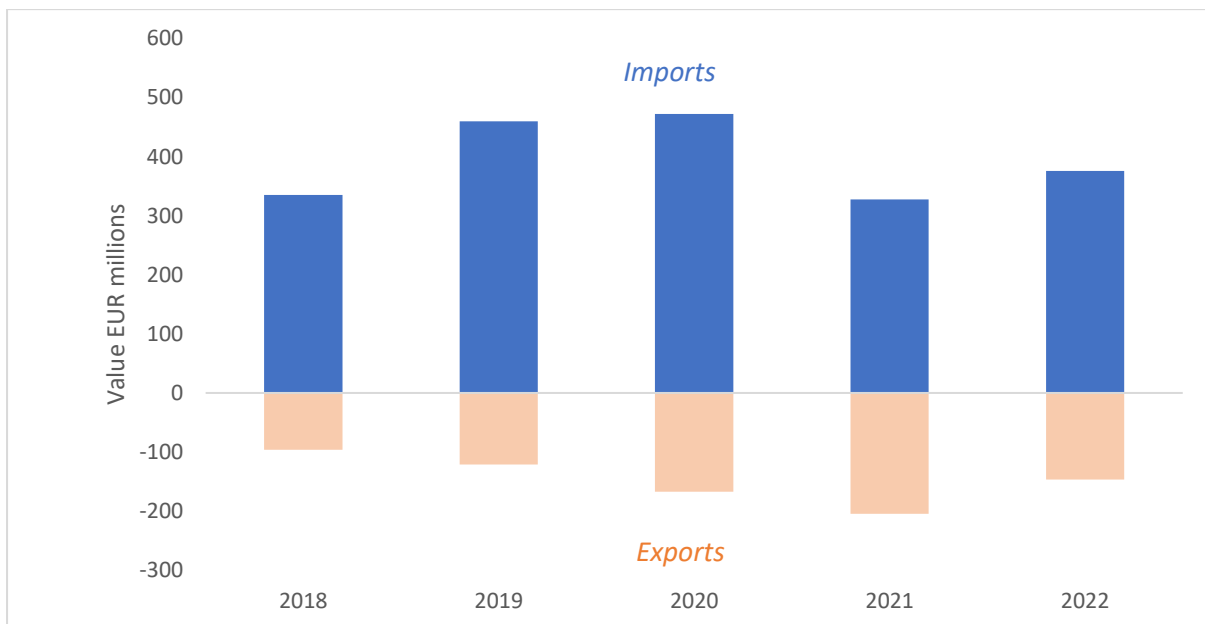
<sup>59</sup> Brazilian Horticulture (2021), <https://www.google.fr/url?sa=t&rct=j&q=&esrc=s&source=web&cd=&ved=2ahUKEwjghc-F3vWDAxXvUaQEHRl5DtIQFnoECCYQAQ&url=https%3A%2F%2Fwww.agroberichtenbuitenland.nl%2Fbinaries%2Fagroberichtenbuitenland%2Fdocumenten%2Fverslagen%2F2021%2F08%2F02%2Fbrazilian-horticulture-opportunities-for-business-and-investments%2FBrazilian%2BHorticulture%252C%2BOpportunities%2Bfor%2BBusiness%2Band%2BInvestments.pdf&usq=AQvVaw2ZSODJNO6d4H28Z2z1vht1&opi=89978449>

**Figure 5-7: Trade balance (imports and exports) of fruits and vegetables In Brazil, 2018-22; value EUR millions**

**Fruits**



**Vegetables**



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 07 and 08.

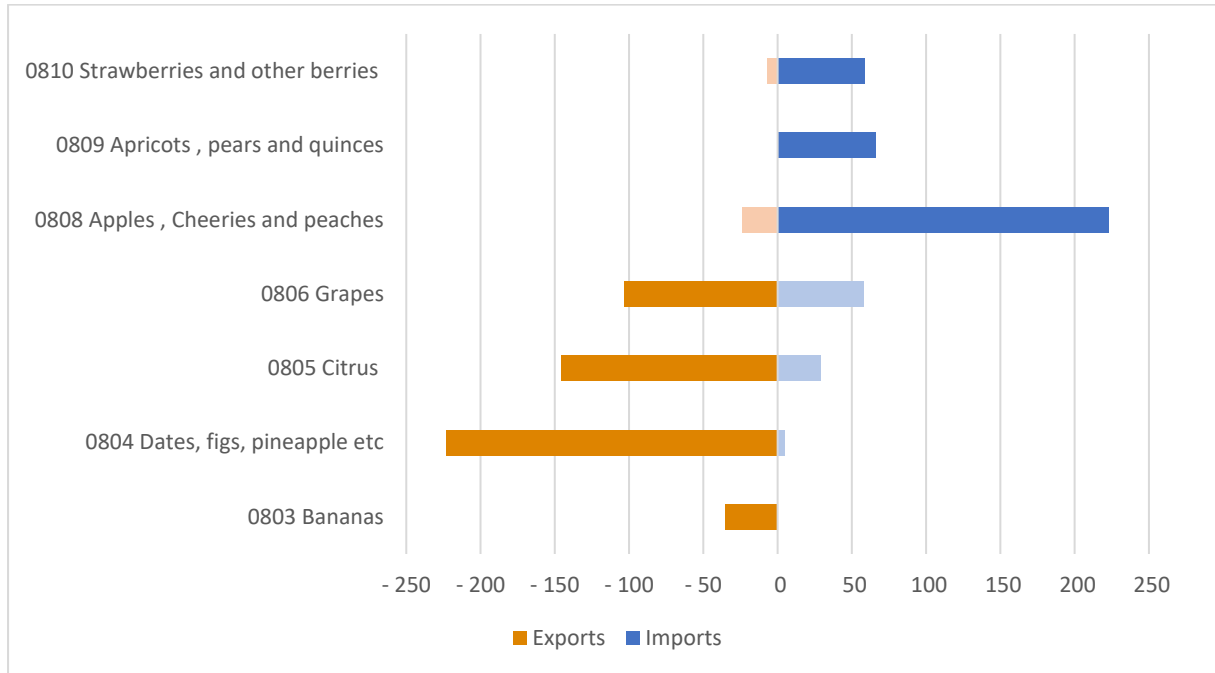
Figure 5-8 further shows the trade balance for fruit products at an individual level. Apples, cherries and peaches is the most imported fruit product category in Brazil by value. This is followed by apricots, pears, and quinces, and then by strawberries and other berries. On the other hand, dates, figs and pineapple is the most valuable exported fruit category. This is followed by citrus, and then grapes.



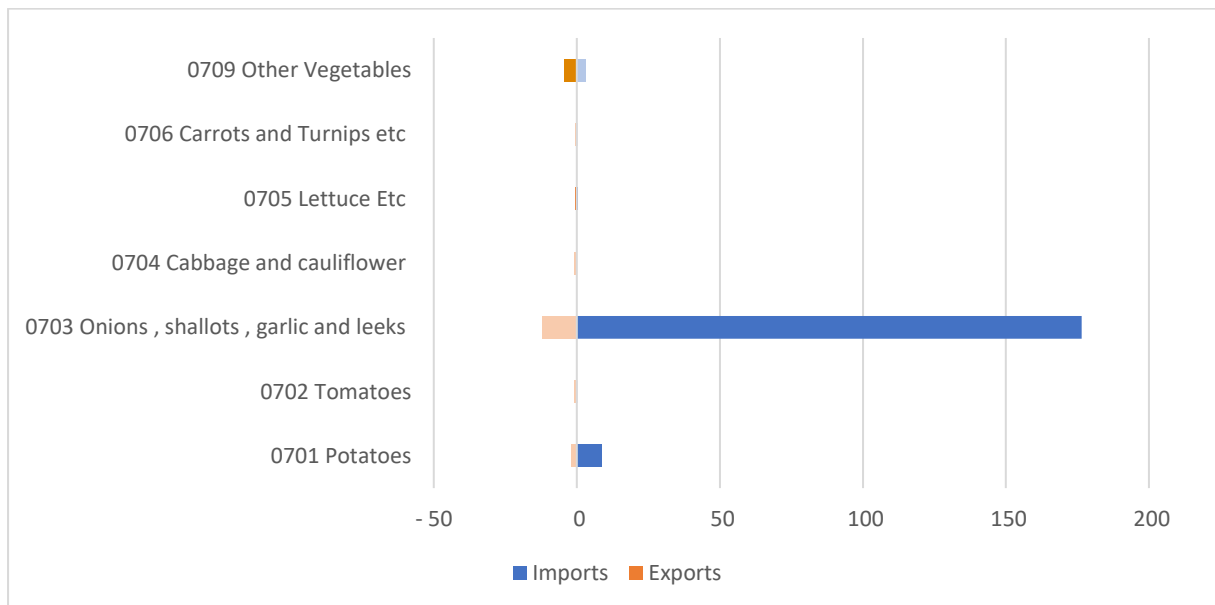
Regarding vegetables, Brazil is a strong importer of onions, shallots, garlic and leeks. Other than that, imports and exports of the shown categories are minor.

**Figure 5-8: Brazilian trade balance of fruit and vegetables by type, 2022 (value EUR millions; selected types only)**

**Fruit**



**Vegetables**



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Note: names for CN codes abbreviated in most cases. Only indicated CN codes presented in these figures. 6 codes for fruit and 7 codes for vegetables are missing, which is why individual figures do not add up to totals in previous graphs.

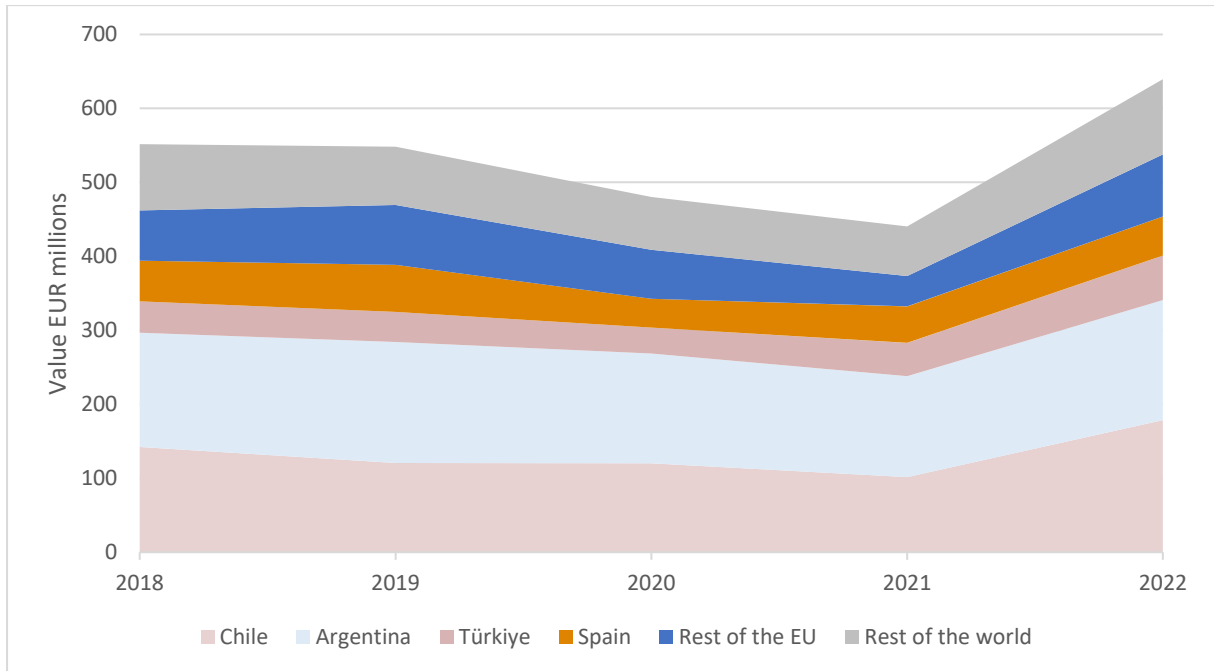
Figure 5-9 shows that Chile is the largest exporter of fruits to Brazil with a value of EUR 179 million in 2022. Argentina and Turkey are the second and third largest exporters. Spain is the

largest EU exporter of fruits to Brazil with a value of EUR 53 million. Besides Spain, Italy and Portugal are also important EU exporters of fruit to Brazil. The EU in total accounted for over 20% of the total value of exported fruit to Brazil.

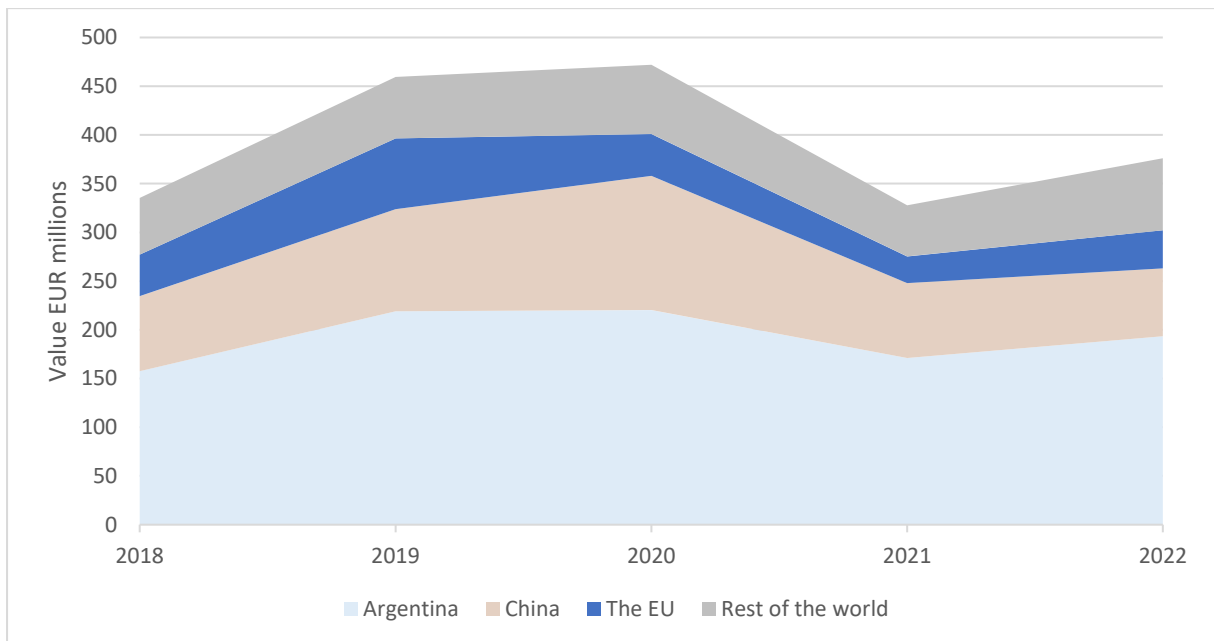
Argentina is the largest vegetable exporter to Brazil with a value of EUR 193 million in 2022. China is the second largest vegetable exporters with EUR 70 million. The EU in total accounted for about 10% of the value of exported vegetables to Brazil, mainly due to Spain and the Netherlands.

**Figure 5-9: Brazilian imports of fruits and vegetables by country, 2018-22; value EUR millions**

**Fruits**



**Vegetables**



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 07 and 08.

**EU GI products**

As noted in section 4.2.4, there is a register of protected GIs. No EU GIs for fresh fruit and vegetables were identified on this list at the time of writing.

## Main competitors

The main competitor to exports from the EU is domestic production as Brazil is a very large producer of both fresh fruits and vegetables. As domestic products are cheaper than imported ones, consumers are more likely to choose domestic produce. Chile and Argentina are the largest import competitors in terms of fresh fruits. The largest import competitors for vegetables are Argentina and China.

## 5.2.4 Specific market entry requirements

### Market access and entry

The customs procedures for importing foodstuffs are set out in section 4.2.1. A full list of the general documentary requirements for export set out in Table 4-1, along with requirements by product category in Table 4-2. Requirements for fruit and vegetables notably include: inspection of agricultural products; registration of importers of agricultural products; and a phytosanitary certificate; with further requirements in certain cases.

In terms of tariffs, fruit and vegetables generally face tariffs of 8%.

**Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:**

**Main page – select product, country of origin and destination country:**

<https://trade.ec.europa.eu/access-to-markets/en/home>

**Example link – apples category (0808) from France to Brazil**

<https://trade.ec.europa.eu/access-to-markets/en/search?product=0808&origin=FR&destination=BR>

### Standards, SPS measures, Labelling

Comprehensive information on the legislation relevant to fresh fruit and vegetables, including: technical regulations on the identity and quality, registration requirements and labelling can be found at the following two websites of MAPA:

<https://www.gov.br/agricultura/pt-br/assuntos/inspecao/produtos-vegetal/legislacao-de-produtos-origem-vegetal/legislacaoPOV>

<https://www.gov.br/agricultura/pt-br/assuntos/inspecao/produtos-vegetal/rotulos-e-embalagens-dipov/rotulos-e-embalagens-para-produtos-vegetais-padronizados>

Brazil permits (and has in certain cases such as certain stone fruits and blueberries, introduced requirements for) the use of methyl bromide for phytosanitary treatment for quarantine purposes. This may impact some fruit and vegetables for which alternatives to this treatment are still pending agreement with Brazilian authorities; though some member states have successfully negotiated alternatives already.

## 5.2.5 Distribution

Brazilians purchase fresh fruits and vegetables from diverse sources catering to different preferences and lifestyles. Local markets, known as "*feiras livres*," are popular choices in some areas, providing a variety of produce in open-air settings. Urban and suburban residents often opt for grocery stores for convenience and a broad selection of fresh items.

While no breakdown of the distribution of fresh fruit and vegetables is available, data on the distribution of fresh food more widely is; and this can be considered to be fairly representative of distribution of fresh fruit and vegetables. In 2022, supermarkets and hypermarkets

combined accounted for just over half of all fresh food sales in Brazil, with supermarkets the slightly more important channel. Small local grocers (both street markets and local grocers) account for around 30% of sales. The importance of this latter channel has been increasing slightly in recent years, while the importance of supermarkets and hypermarkets has remained flat. The remaining 15-20% is split between various channels – specialists retailers (such as the fruit chain Hortifruit), convenience stores, non-food retailers, and finally, e-commerce. However, the use of e-commerce for fresh food sales remains very limited, with the channel accounting for only 0.6% of fresh food sales in 2022.

## 5.2.6 Challenges for EU products

A number of challenges exist for EU fresh fruit and vegetable producers seeking to enter the Brazilian market. Firstly, Brazil is a very strong domestic producer of fresh fruit and vegetables. Most domestic Brazilian fruit and vegetable products are competitive both in terms of price and quality. Brazil also is close to a number of other fruit and vegetable producers such as Argentina and Chile, which are able to address shortfalls in domestic production. Fruits and vegetables from the EU are more expensive and in addition needs to be shipped far to reach Brazil, which takes time plus can suffer additional delays in port and/or during import checks – with knock on-effects on shelf-life and even the feasibility of export. Furthermore obtaining market access can be very challenging, with many products not having access or waiting on applications to be processed. However, in cases where market access is in place, there are opportunities in the Brazilian market due in part to consumer demand for fruit outside of the traditional Brazilian diet such as apples, pears, cherries, apricots and berries; as well as the reverse seasonality. Some EU countries have also been successful in exporting kiwis and citrus fruits to the country.

### Market Takeaway: Fresh fruit and vegetables

**Consumption:** *The fresh fruit market in Brazil had a size of 18.5 million tonnes in 2022 and the vegetable market had a total size of 7.8 million tonnes. Both markets are forecast to grow.*

**Competition:** *The domestic sectors present the main competition for EU producers as Brazil is a strong producer of a number of key fruits and vegetables. There is also strong competition from Argentina, Chile and China which are already established in the market.*

**Distribution:** *Largely sold through supermarkets, hypermarkets and small local grocers. E-commerce is nearly non-existent.*

**Challenges:** *Within Brazil, the wide amount of domestic fruit and vegetables present in the market at competitive prices and quality is also a key challenge to overcome. Higher prices of imported EU products, and the long distance between the EU and Brazil also present challenges. Market access can be difficult and hence can limit export options.*

**Opportunities:** *Strawberries, cherries apples, apricots, berries and onions shallots, garlic and leeks are amongst the fresh fruit and vegetable products commonly imported into Brazil. Growing interest in health food increases demand for fruit and vegetables. Sustainable produce and reverse seasonality.*

## 5.3 Dairy

### 5.3.1 SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> <li>▪ Brazilian consumers are <b>large consumers of dairy products</b> owing to the historical, culinary and breakfast culture of the country.</li> <li>▪ <b>Cheese</b> is dairy product of which the EU has a significant volume of exports to Brazil, with the Netherlands, Italy and France being amongst the five largest exporters of cheese to Brazil.</li> <li>▪ <b>Cultural</b> ties between the EU and Brazil has aided in the awareness of EU speciality dairy products in Brazil amongst consumers.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Brazil is a <b>major producer of dairy products</b> and domestic products are quick to accelerate production towards niche and unique products which are growing in demand in the country.</li> <li>▪ The <b>price sensitivity</b> of the average Brazilian consumer means that demand for EU dairy products is limited largely to the upper middle income and higher income earner class.</li> <li>▪ <b>Tariffs remain</b> in place for certain EU dairy products which are exported to Brazil, further exacerbating the capacity for lower and middle income earners to afford EU dairy products.</li> <li>▪ <b>Raw milk products and cheeses</b> cannot be imported into Brazil.</li> </ul>
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> <li>▪ <b>Yoghurt products</b> are increasingly in demand in Brazil as consumer appreciate the convenience and nutritional value of these products.</li> <li>▪ <b>Specialty premium cheeses and milks</b> are growing in demand, and there is increasing awareness and appreciation for EU varieties of these products, particularly for French and Italian cheeses.</li> <li>▪ The potential for an <b>EU-Mercosur FTA</b> to be implemented in the short term may assist EU dairy producers as the <b>removal of tariffs</b> and streamlining of market access will make it easier for EU producers to enter the market.</li> <li>▪ There are indications that the <b>north-east</b> of the country may be <b>under-served</b> for <b>some dairy products</b>; particularly those for children such as yoghurts.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Brazil borders</b> other large dairy producers, particularly <b>Argentina</b>, which can address any shortfalls or gaps in the Brazilian dairy market. Argentina also free market access to the Brazilian market giving it a comparative advantage over EU producers.</li> <li>▪ <b>Demand</b> for non-staple dairy products such as yoghurts, cream and niche dairy products is largely <b>corelated</b> to the <b>level of inflation</b> that Brazil is currently facing, which makes long term strategic planning for these products being particularly difficult to manage.</li> <li>▪ <b>Domestic production of premium and speciality dairy</b> products are <b>growing</b> in <b>production</b> in <b>Brazil</b> and there is a notable rise in artisanal producers in the country which directly threaten EU speciality products.</li> <li>▪ The situation with <b>tariffs</b> has been <b>unstable of late</b>, creating some uncertainty for exporters.</li> </ul>

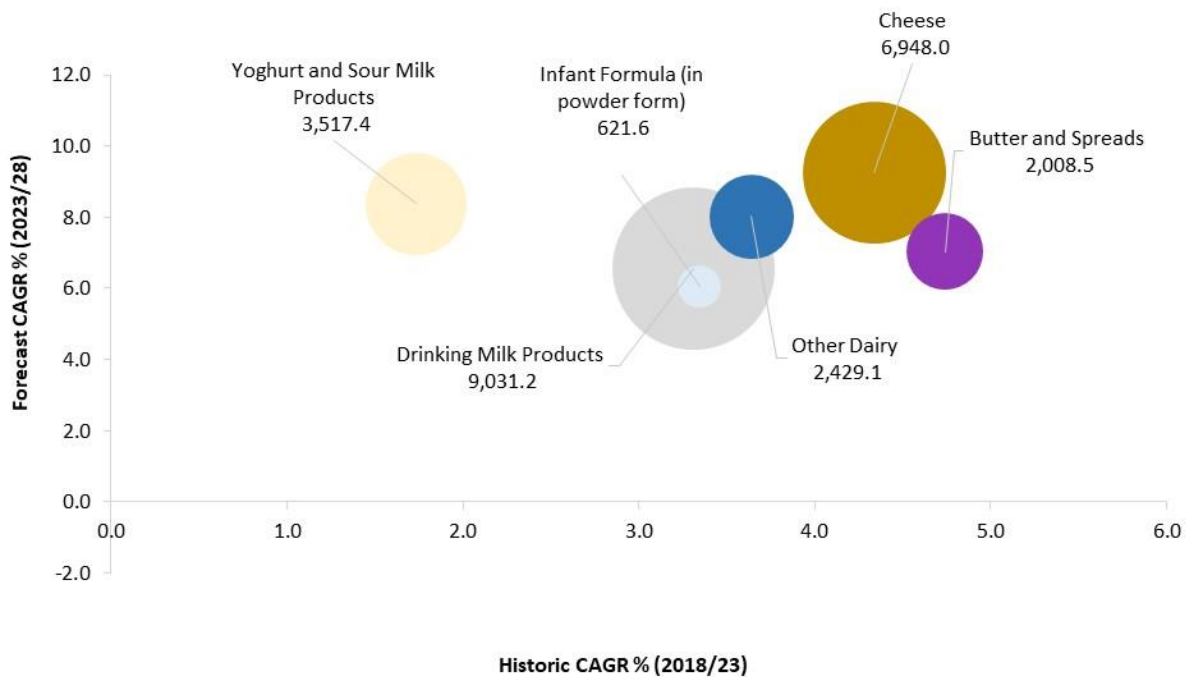
### 5.3.2 Consumption

#### Evolution of consumption

The dairy market of Brazil had a total market size of close to 24.5 billion EUR in 2023. As shown in Figure 5-10 below, the largest dairy product in Brazil by retail value is drinking milk products with a retail value of EUR 9 billion. The market for drinking milk increased by a CAGR of 3.3% between 2018 and 2023 and is forecast to grow at a faster rate at around 6.5% annually between 2023 and 2028. Cheese is the second-largest dairy product with a retail value in Brazil of EUR 6.9 billion; the market for cheese is the predicted to be the fastest

growing dairy market in Brazil in the short term with a predicted CAGR of 6.5% between 2023 and 2028. Yoghurt and sour milk products represent the third largest dairy product by retail value in Brazil with a total retail value of EUR 3.5 billion, followed by other dairy products with a retail value of EUR 2.4 billion, butter and spreads to a value of EUR 2 billion and finally infant formula with a total retail value of EUR 621 million. Overall, the dairy market in Brazil is forecast to grow consistently across all major product categories between 2023 and 2028 with CAGR above 6% predicted for each major dairy product during this period.

**Figure 5-10: Evolution and forecast of dairy market (retail value, EUR millions) in Brazil, 2018-2028**



Source: Euromonitor International: Packaged Food, 2023.

## Consumers

Dairy consumption in Brazil is deeply ingrained in the country’s culinary and cultural fabric with a diverse range of dairy products such as milk and cheese being perceived as a staple food in the country. Overall dairy consumption per capita rates in Brazil are notably higher than in other Latin American countries owing largely to: historical reasons (the Portuguese influence on the local diet heavily emphasized dairy consumption); the breakfast culture of Brazil; and the usage of dairy products within traditional Brazilian dishes such as cheese in a Brazilian *feijoada* (a stew of beans and pork). A further breakdown of dairy products by consumer group is outlined below.

**Milk:** Milk consumers represent a diverse profile as the product is treated as a staple food in the country, annual per capita consumption of milk and milk equivalents in Brazil is estimated to be around 150 kg per capita which is above average in regard to general rates of consumption throughout Latin America; and around ¼ of this is estimated to be in the form of drinking milk.<sup>60</sup> Some of the main consumer groups of note include children and adolescents

<sup>60</sup> Per Capita milk consumption, 2020, Our World in Data, available at <https://ourworldindata.org/grapher/per-capita-milk-consumption>



and family households as milk compliments many meals and forms a primary source of nutrients for younger consumers. Men over 70 are a further notable demographic, with retired rural professionals a particularly strong consumer. Health-conscious consumers with an increasing focus on health and nutrition may prioritise milk consumption over other beverages due to the nutritional benefits of milk. Middle-high income consumers are most likely to opt for premium and specialised milk products such as organic or lactose-free milks which contributes to a growing market for niche dairy products in Brazil.

**Cheese:** Cheese consumption in Brazil is also a growing dairy product category with the product being commonly enjoyed across the population of Brazil. One of the more unique consumer groups that stand out is family households, as cheese compliments a variety of dishes from sandwiches to pasta which makes it a convenient food item for Brazilian family households. Gourmet enthusiasts which are typically urban consumer among the higher income class are the consumer group most likely to see out imported high quality EU cheeses which contributes to the diversification of the cheese market in Brazil. Among this demographic, millennials in particular stand out. At the very top end of the income scale, the ultra-affluent consumer creates a niche which looks for premium imported cheeses; often to create impressive selections during social events. Health-conscious consumers will be more likely to see out certain types of cheese such as low-fat or reduced sodium variety of cheeses which cater to these consumers groups desire for healthy products.

**Yoghurt:** Yoghurt consumption in Brazil has grown in popularity in Brazil in recent years as consumers appreciate the versatility and nutritious value of yoghurt products. The overarching largest consuming demographic is urban-based, higher socio-economic class females aged 30-45. However, there are various other Brazilian consumer groups which stand out within the yoghurt market. Health-conscious consumers increasingly associate health and wellness with the consumption of yoghurt products. Fitness enthusiasts have also emerged as a key consumer group as this consumer group appreciate the high protein content of certain yoghurts such as Greek yoghurt and incorporate these yoghurts into their diets to support muscle-recovery and overall wellbeing. Culinary enthusiasts appreciate the versatility of yoghurt products and use yoghurts in sweet and savory dishes such as a smoothie or with chicken turnovers as a compliment. Yoghurts are often given to children and indeed there is a niche of affordable yoghurt products which targets them; though in parts of the country (such as the north east) supply of these products is reported to be somewhat limited. Finally, older consumers appreciate the ease of consumption associated with yoghurt products which aids in their popularity within this consumer group in Brazil.

**Butter and Spreads:** Butter and spreads are a large product category in Brazil with a market retail value of EUR 2 billion. Butter is a well-established product within the households of Brazilian families and the product complements several other products. The key consumer groups for butter and spreads in Brazil are family households, culinary enthusiasts who are more likely to appreciate specialty (often imported) butter and spreads products and urban professionals who appreciate the convenience of storing and consuming butter and spread products. Traditionalist consumers are also a key consumer group but are more likely to produce or purchase butters of a particular Brazilian variety such as Brazilian nut butter spread.

**Other Dairy:** There are a variety of dairy products that fall into the other dairy category which includes condensed milk, cream and fromage frais. The key consumer groups for these products vary slightly with condensed milk appealing particularly to bakers or dessert enthusiasts who appreciate the usage of condensed milks within the production of sweet treats. Cream appeals also to this consumer group, as well as to health-conscious consumers who appreciate lighter cream or substitute cream products. Fromage Frais appeals to those exploring new and niche dairy products which can extend to the wider consumer base. Overall, these products are not generally treated as a staple food compared to milk and cheese,

therefore, low-income earners are not likely to prioritise these products into their shopping decisions compared to middle income and higher income earners.

### Drivers and method of consumption

The key drivers of dairy consumption in Brazil are shaped by a combination of cultural, economic, nutritional and lifestyle factors. Dairy products have a deep-rooted presence in Brazilian culinary traditions owing to the country's historical ties to Portugal and enriched by regional influences, dairy products are viewed as a staple within the Brazilian diet. Brazilian consumers further appreciate the nutritional value of dairy products such as milk, cheese and yoghurts and these products are commonly consumed in the country. Traditional Brazilian breakfast culture further encourages the consumption of dairy products in Brazil as milk, butter and cheeses are a common feature on the plates of Brazilian consumers' breakfast plates. Growing globalisation and economic development in Brazil has opened the market more to speciality (often imported) dairy products as has the rise of health consciousness amongst consumers in the country; this in turn acts as the key drivers behind demand for imported dairy products specifically. A breakdown of the major drivers and methods of consumption patterns across each major dairy category is outlined below:

**Milk:** In Brazil, the consumption of milk is driven by a combination of cultural practices, nutritional awareness, and lifestyle factors. Coffee and breakfast culture is high in Brazil and milk complements both these lifestyle factors. Brazil ranks amongst the top ten coffee per capita consumers in the world.<sup>61</sup> The versatility of milk as a key ingredient across multiple Brazilian dishes coupled with the rise in health consciousness which has seen milk's nutritional value grow in appreciation are also major drivers of milk consumption in Brazil. Rising incomes, demand for speciality products and health consciousness is driving demand for milk substitute products such as low-fat or lactose free milks in Brazil which is a growing market. As mentioned, milk is often consumed with coffee, but also milk is used as an ingredient in cooking and baking; consumed as a standalone beverage, included in school meals offered to school children; or consumed as a substitute product to unhealthy alternative beverages.

**Cheese:** Cheese is a key compliment to many traditional Brazilian dishes such as *Pao de Queijo* (Brazilian cheese bread). Cheese is also commonly enjoyed as a standalone product, with the rise in demand for speciality cheeses (often imported) further encouraging this practise as consumers of speciality cheese are more likely to appreciate the unique tastes and textures of these cheeses. Festivities and social gatherings often feature a cheese platter of different cheese types and this further drives demand for a variety of cheeses in the country. The main method of consumption of cheeses in Brazil revolve around: the incorporation of cheese into wider dishes; the consumption of cheese as a breakfast item; the pairing of cheese and bread which is common in Brazil; and the use of soft cheeses in Brazilian desert dishes such as *Romeu e Julieta* (cheese with guava paste).

When looking specifically at more expensive imported cheeses, quality, authenticity and the attraction of foreign and / or novel flavours are key drivers for consumption. Premiumisation and exclusivity are effectively sub-themes of the above, leading to increased interest in imported cheese varieties such as Gouda, Gruyère, Emmental, Brie, Parmesan, Gorgonzola, Camembert, Provolone and Cheddar. It should be noted that there is a slight seasonality to imported cheese consumption, with consumption levels peaking around the major festivals of Christmas, Easter and New Year. Indeed this is not only the case for imported cheese, but also for imported butter.

**Yoghurt:** Growing appreciation for foods with a high nutritional value in Brazil is aiding in the sale of yoghurts across the country. Yoghurts in Brazil are often advertised in a fashion that

<sup>61</sup> The Countries Most Addicted to Coffee, Statista, available at <https://www.statista.com/chart/8602/top-coffee-drinking-nations/>

emphasises its probiotic benefits which is believed to promote gut health, this in turn has helped their association as a key compliment to a healthy and balanced lifestyle for Brazilian consumers. Yoghurts are often consumed as a standalone product due to them being a quick and nutritious snack. Yoghurts further are often associated as a breakfast meal, consumed with granola or Brazil nuts; the breakfast culture of Brazil compliments yoghurts overall in this sense. Yoghurts have further emerged as a key base product used in the preparations of smoothies which is appreciated by fitness and health-conscious consumers seeking convenient high protein and nutritional products.

**Butter and spreads:** Butter and spreads in Brazil benefit from their utilisation within many meals, particularly breakfast meals with breakfast culture being quite strong in Brazil. Butter when consumed in moderation is perceived as a source of healthy fats and its inclusion in diets is often guided by a consumer desire to balance taste preferences with nutritional considerations. Margarine is often used for the baking of Brazilian desert dishes which is a key driver amongst consumers operating in the desert food service sector or baking enthusiasts who like to bake at home. There is also a growing demand for plant-based alternative spreads across consumers seeking niche or alternative spreads.

**Other dairy:** Similar drivers and methods of consumption exists for products under the other dairy category, namely, the desire for convenient products, nutritional products, and products which compliments the lifestyles and diets of Brazilian consumers. Notable unique drivers that exist include the usage of condensed milk products to produce Christmas holiday deserts, the use of cream as a versatile ingredient in the baking process and the use of fromage frais within traditional dishes such as *pao de queijo* and *coxinhas*.

### Purchase criteria

Brazilian consumers place a high value on the quality and freshness of dairy products; freshness is often associated with better tastes and nutritional value. Due to this, there is a slight preference for locally produced dairy products in Brazil, although this is less of a factor within the market for specialty and premium dairy products, which are often imported from abroad and indeed for which origin, quality and exclusivity are important criteria. Brand trust and reputation are key purchasing criteria, as is the nutritional content, as consumers look for dairy products that are rich in nutritional content such as calcium, protein, and vitamins. The role of convenience should not be underrated, with mass market consumers in particular likely to favour products which are readily available in the supermarket they normally frequent. This convenience criterion also extends to the product / packaging format; soft and spreadable cheeses are more popular than hard cheeses at least partly due to the spreadable format being more convenient. Cultural preference plays another role, as some consumers will prefer to use specific domestic ingredients when preparing traditional Brazilian dishes. Price is a critical factor for standard dairy products in what is a generally price-sensitive market. While quality is essential too, price is often the key purchasing criterion. There is a subset of consumers who will focus on nutritional qualities; particularly in the case of yoghurts.

Consumers of premium dairy products will often seek labels of authentication to verify the premium tag of their products; these labels are often GMO-free labels or animal welfare certificates. Innovation in the dairy sector is appreciated by consumers, particularly young and urban consumers, who tend to have a greater appreciation for alternative food and beverage products. Innovation can take the form of offering additional flavours, formulations, or alternative (plant-based) options. Imported dairy products from the EU will likely heighten expectations regarding quality and taste, particularly for cheeses of EU origin, and even more so for those from France, the Netherlands or Italy, which are preconceived to be among the highest quality cheeses available globally. For butter, France and Italy are associated with particularly high quality in Brazil. The communication of tradition and heritage, including



through labelling can help with boosting the consumer perception of an imported premium dairy product.

### Dairy products on retailers' shelves in Brazil

In terms of pricing for butter and cheese:

- Economy products retail at under BRL 15 (EUR 2.70) per 100g
- Mid-range products retail at under BRL 25 (EUR 4.60) per 100g
- Premium products retail at BRL 25 to 50 (EUR 4.60 to 9.25) per 100g
- Ultra-premium products retail above BRL 50 (EUR 9.25) per 100g

Typically around ¼ of cheeses on sale are imported; while a lower percentage of butter (up to 10%) is. They tend to focus on the mid-range segment and higher.



Above: imported cheeses. Where they are not pre-packaged, they have been cut, weighted and packed. Below: in some higher end stores, cheese counters do exist.



Imported cheeses have generally already been cut, weighed and packed, if they are not already prepackaged. Packaging formats for imported cheese vary considerably (rigid containers and flexible wrapping of various materials may be used). Common formats for imported cheese are under 200g (frequently 150g); and large 1kg packs. For imported butter, 200g and 250g are most common pack sizes for imported products, with thin walled containers and foil wrapping roughly equally popular. This is different for domestic butter however, where 500g is the most in demand.





Above: imported butter. As can be seen, 250g popular and both foil and rigid plastic containers are used.



*Below: gourmet cheeses displayed along other aperitifs and wine in a north-eastern supermarket. Below: dedicated French cheese display in a gourmet supermarket, again with wine and other aperitives on display.*





Images © Euromonitor International / Agra CEAS, 2024.

### Recent market trends

Demand is growing substantially within the yoghurt and cheese markets, which represent the two key growing products within the dairy sector of Brazil, with milk and butter and spreads being two more mature and established markets. A breakdown of the key recent market trends is provided below.

**Milk:** Milk consumption and purchases in Brazil remain heavily linked to inflation levels, with milk product price hikes of up to 80% in recent years, making them largely unaffordable for many lower-income consumers who make up a sizable portion of the total consumer base. The combination of high inflation and milk's cultural, culinary, and familial significance in Brazil has forced dairy producers to reconsider how they can continue to provide these products to consumers who are facing increasing financial pressures as a result of stagnant incomes and rising inflation. In response, Brazil has witnessed the emergence of *bebidas lácteas*, or dairy drinks, which are milk alternatives made by mixing milk whey with water. These dairy drinks offer a less nutritious option compared with milk but come at a lower price. Protein enhanced milks are a further recent trend which focuses more on consumers driven by health and wellness considerations; and whole milk, after some years of being shunned, has also become more popular again.

**Cheese:** The cheese market has been impacted by several regulatory changes in Brazil in recent years. For example, in 2022, to combat rising dairy derivative prices, the then-federal government decided to reduce import tariffs to zero on a variety of categories, including cheese. The measure, which was initially valid until the end of 2022, aimed to create a supply

shock through imports into the Brazilian market, thereby contributing to lower food inflation and allowing certain imported cheeses to become more competitive in the Brazilian market.

In 2023, the current federal government approved a one-year tariff increase on three dairy products from 13 percent to 18 percent. Two of these products are blue mould cheese and other cheeses containing *Penicillium Roquefort*, as well as cheeses with a moisture content equal to or greater than 46 percent and less than 55 percent by weight (soft mass). In this way, the government hoped to further align with the demands of the domestic dairy industry. Despite recent challenges in the cheese industry, its strength has never wavered. In Brazil's major food retailers, cheese sections remain stocked with products from various brands, both domestic and imported, offering a wide range of formulations and size options for various consumption occasions increasingly in major cities. It is also increasingly possible to find specialised gourmet stores that sell more niche and premium products, such as professional artisanal cheeses. In these shopping environments, in addition to a more sensory and premium experience, customers can learn more about the product's origin, manufacturing process, and distinguishing features.

In the Brazilian foodservice segment, there has been considerable interest in Burrata, with the product being used in both starters and main courses alike. This has however also led to the production and use of imitations of the cheese as well.

**Yoghurt:** Deflation for packaged foods in Brazil in 2023 helped yoghurt products to sustain growth in the market in particular as the product, while popular, is often viewed as a luxury product instead of a staple food such as cheese and milk. There are a number of key drivers behind the growth of yoghurts in the Brazilian market in recent years which includes protein-infused yoghurts which have grown dramatically in Brazil since 2021 and are appreciated particularly by fitness enthusiasts as a key source of a convenient high protein product. The versatility of yoghurts has also helped the product category to grow in the Brazilian market as various new formats and flavours of yoghurt have emerged in the category. Whether for indulgent or functional consumption, yoghurt has evolved beyond its role as a breakfast staple or morning snack to become a popular dessert choice, offering distinct characteristics and flavours that, when combined with other ingredients, produce innovative desserts.

**Butter and Spreads:** Inflation, as it is the case for many dairy products in Brazil, has a significant impact on recent market performance. Butter consumption in Brazil has increased in recent years as efforts to combat inflation have helped to partly restore Brazilian consumers' purchasing power. Butter is still perceived as a superior product compared with margarine, both as a spread and as a culinary ingredient. This trend will also be supported by major brands reconfiguring their product offerings in traditional retail, offering different formats and flavours, and a positioning aligned with health consciousness. For individuals without lactose restrictions, traditional butter emerges as a potential substitute for olive oil. It has already gained popularity in foodservice and Brazilian households, and recent production issues in Spain and Portugal with olives and the associated price rises in olive oil have pushed the idea of using butter as a key substitute item to olive oil in Brazil. Furthermore, there has also been some emerging interest in the category of ghee.

A further trend in the butter segment is that of flavours and blends of butter. For example, one local company produces eight different flavours of traditional salted butter, including pineapple, passion fruit and mango. There has also been a strong focus on innovation in terms of blends, whether in butter or margarine and spreads or with palm oil as an alternative raw material. This trend in blends is one which is particularly attractive for addressing the affordability conundrum.

**Other dairy:** Other dairy products include sweetened condensed milk and heavy cream, which are notable for their cultural significance in Brazilian cuisine as well as their emulsifying properties, making them essential ingredients in a variety of culinary applications. In Brazilian

food retail, product diversification is increasing, with options with varying flavour intensities, levels of creaminess, lactose-free variants, and vegan alternatives, among other things. These innovations aim to meet consumers' evolving demands, with players adapting their product portfolios to the market's changing needs. The increase in consumption in other dairy categories reflects consumer behaviour in Brazil; when it comes to indulgent desserts, people prefer to visit a foodservice establishment or prepare desserts at home rather than consume chilled dairy desserts.

A final **overarching trend** of note is the rise of plant based alternatives, with the market now worth well over EUR 100m and estimated to be growing at 10%. Health and sustainability concerns, as well as changing dietary preferences are driving this market growth. A neighbouring trend to this has been the development of new dairy products responding to allergies; most notably for the lactose-intolerant consumer. There is indeed an overlap with some plant based products specifically marketed on the basis of the absence of lactose.

### 5.3.3 Offer

#### Domestic production

Brazil is a major global player in the dairy production industry, boasting a diverse industry that includes both large-scale and small family farms. The country ranks as one of the largest producers of milk in the world and is also a major producer of cheese and butter. The sector benefits from favourable climatic conditions within certain regions of the country and growing demand for domestically produced dairy products.

A breakdown of production and market segmentation by dairy product is provided below:

- **Milk:** Brazil is currently within the top five global producers of milk, with the country producing around 24.7 million metric tons (MMT) of milk in 2023.<sup>62</sup> Most of the milk production sector of Brazil is based in the southern and south-eastern states such as Minas Gerais which is the largest milk producing state in Brazil, followed by Parana and Rio Grande do Sul. There are currently over one million producers in Brazil although many smaller and medium sized producers are having the to invest significantly in technological advancements as large-scale producers continue to account for an ever-larger share of Brazilian milk production. The largest milk producers in Brazil as of the end of 2023 were Laticinios Bela Vista Ltda (just under ¼ of the market), Lactalis do Brasil (10% share of the market) and Cooperativa Central dos produtores Rurais de Minas Gerais Ltda (7.5% share of the market).
- **Cheese:** The production of cheese was estimated at 770 000 tonnes in 2023. It is mainly driven by demand from the food service sector in Brazil although increasingly there are several artisanal cheese stores and producers that have emerged in the country which cater to speciality premium cheese production. The cheese production sector is very fragmented, the largest company by share of the market is Polenghi Industrias Alimenticas Ltda (share of around 10%) followed by Laticinios Tirolez Ltda (around 7%) and Lactalis do Brasil (share of 5%). The rest of the market is made up of smaller producers which each have 1% or less of a share in the market.
- **Yoghurt:** Yoghurt production in Brazil tends to be highly concentrated near or within urban centres of the country with the production of yoghurt being less common in more rural areas of the country. The production of yoghurt has accelerated in the country in recent years as domestic demand continues to grow. The largest companies currently

<sup>62</sup> Dairy and Products Annual, USDA, available at <https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Dairy%20and%20Products%20Annual%20Brasilia%20Brazil%20BR2023-0026.pdf>



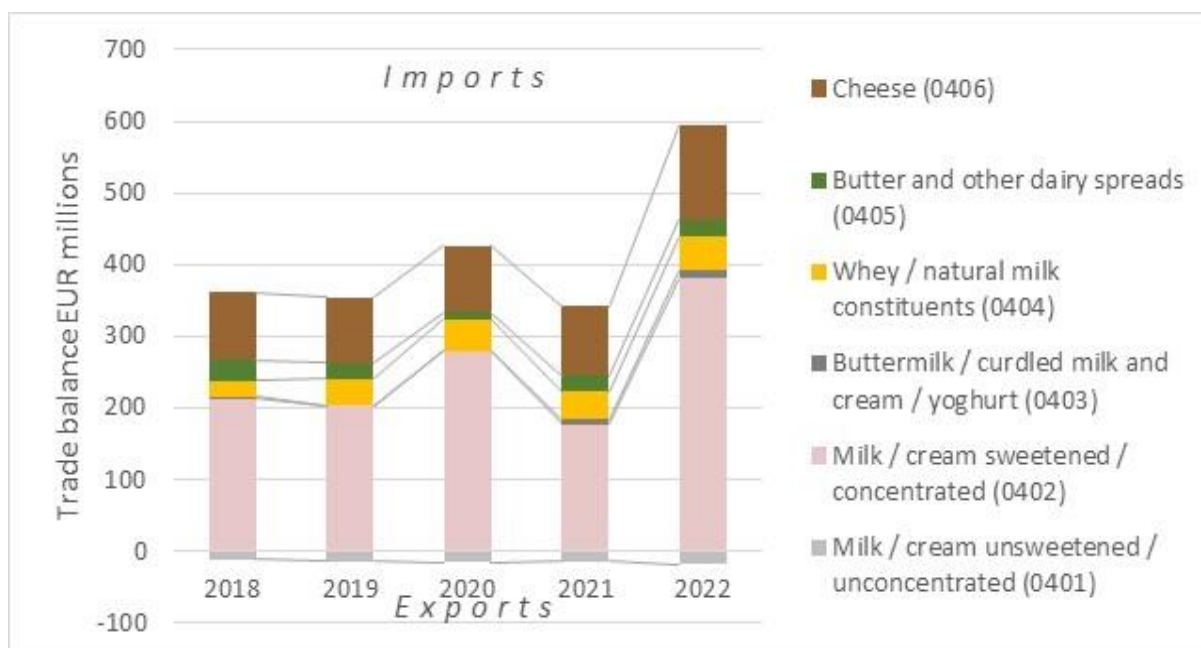
operating in the Brazilian yoghurt market are Danone Ltda (With a share of just over 1/3 of the market), Dairy Partners Americas Brasil Ltda (with a share of around 15% of the market) and Yakult SA industria e comercio (with a share of 5% of the market). The rest of the market is made up of smaller producers and is quite fragmented.

- **Butter and spreads:** Butter production in Brazil is estimated to be around 81 000 metric tonnes (MT) in 2023 which is broadly in line with 2022 statistics. Production is highly linked to inflation with rising inflation having a direct negative impact of total production statistics. The butter and spreads production sector is heavily influenced by two companies, these being JBS SA (with a share of 23% of the market) and BRF SA (with a share of 20% of the market), these two companies stand as being the largest in the market by a considerable distance with the third largest company, Fabrica de Productos Alimenticos having a share of under 10%. The rest of the butter and spreads production sector is largely made up of smaller producers with limited influence on the wider market.
- **Other dairy products (e.g., cream):** This sector overall is quiet small relative to the larger milk, cheese and butter sectors however this sector is amongst the fastest growing dairy production sectors within the wider dairy market of Brazil. This sector is heavily influenced by three companies which share close to 50% of the market: Nestle Brasil, Laticinios Bela Vista Ltda and Gioasminas Industria de Laticinios Ltda.

### Imports and exports

As can be seen in Figure 5-11, Brazil is a net importer of a number of dairy products including milk/ cream sweetened/ concentrated (0402), buttermilk / curdled milk and cream / yoghurt (0403), whey / natural milk constituents (0404), butter and other dairy spreads (0405) and cheese (0406). The only major product category displayed in Figure 5-11 where Brazil is shown to be a net exporter is the milk / cream unsweetened / unconcentrated (0401) product category.

**Figure 5-11: Trade balance (imports and exports) of dairy in Brazil, 2018-22; EUR millions**



Source: Trade Map, International Trade Centre – <https://www.trademap.org/>

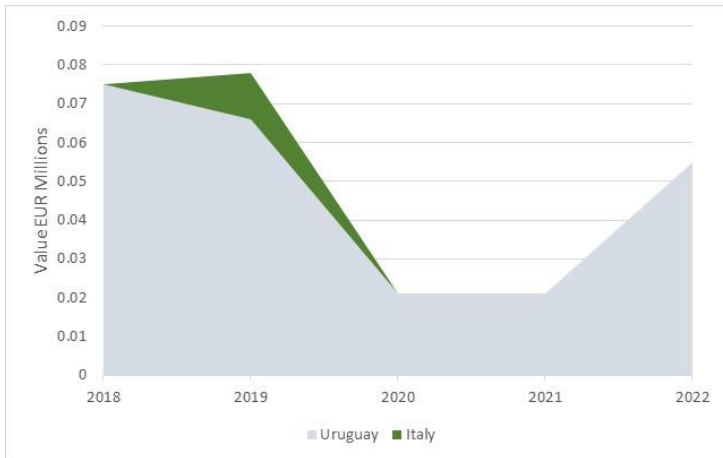
CN codes in brackets.

Figure 5-12 shows the various dairy products that are imported by Brazil and their country of origin. Argentina tends to be the predominant exporter of dairy products across most categories, although new players have emerged in recent years.

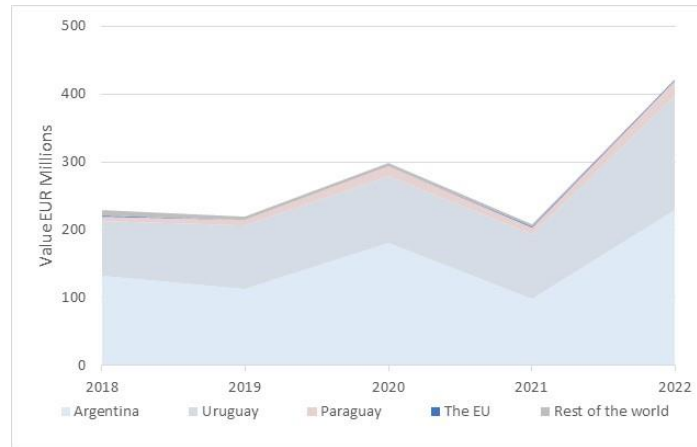
- **Milk/cream unsweetened/concentrated:** Brazil imports a very minimal amount of milk/cream unsweetened/concentrate products to a point where it is virtually none with the exception of some very small imports from neighbouring Uruguay to a value of just EUR 55 000.
- **Milk/cream sweetened/concentrated:** Mercosur partners Argentina, Uruguay and Paraguay stand as the three largest exporters to Brazil with Argentinian exports coming to a value of EUR 228 million. The EU as whole is not a major exporter with total exports only coming to a value of EUR 263 000.
- **Buttermilk / curdled milk and cream / yoghurt:** Imports are mainly from neighbouring Argentina and Uruguay, with Uruguay, the main exporter, exporting these products to a value of EUR 10.9 million in 2022.
- **Whey/natural milk constituents:** Argentina is the largest exporter to a value of EUR 34.3 million followed by the USA to a value of EUR 4.9 million. France is the third largest exporter to a value of EUR 2.9 million. The rest of the EU accounted for a total trade value of EUR 4.6 million.
- **Butter/dairy spreads:** Argentina is also the largest exporter of butter and spreads to a value of EUR 160 million, this is followed by Uruguay to a value of EUR 6 million and New Zealand to a value of EUR 3.7 million. The EU accounted for the rest of all global trade which comes to a value of EUR 2.8 million.
- **Cheese:** Argentina further is the largest exporter of cheese to Brazil, to a value of EUR 120 million; this is followed by Uruguay to a value of EUR 22 million and the Netherlands to a value of EUR 3.6 million. Italy also recorded a total export trade value for cheese to Brazil of EUR 3.6 million followed closely by France which recorded a total trade value of EUR 3.5 million. The rest of the EU accounted for around EUR 918 000 worth of exports.

Figure 5-12: Brazilian imports of different dairy categories by country, 2018-22; EUR millions

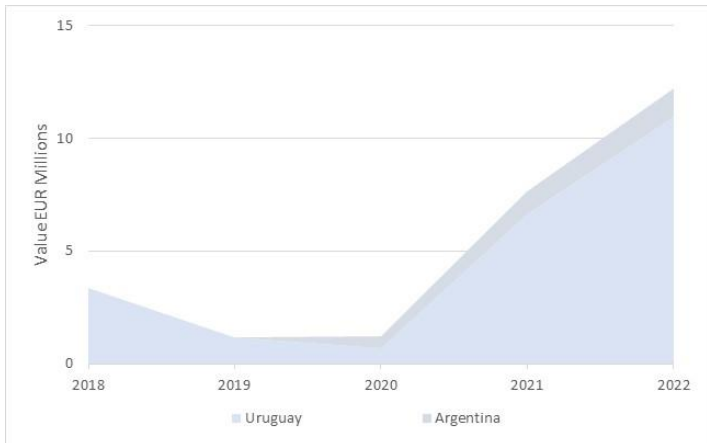
**0401 Milk/cream unsweetened/concentrated.**



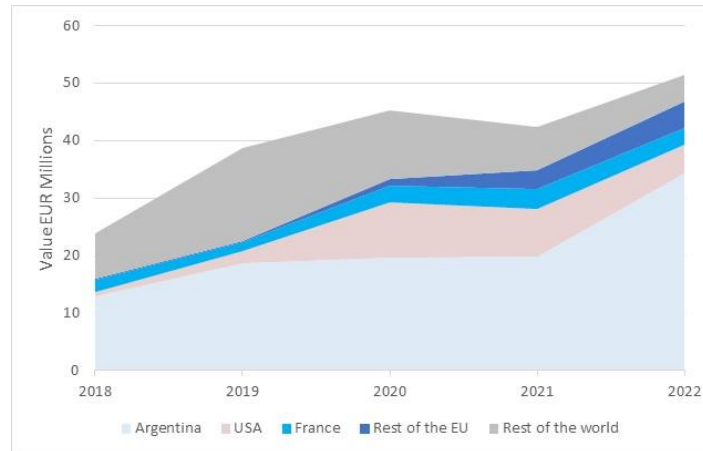
**0402 Milk/cream sweetened/concentrated.**



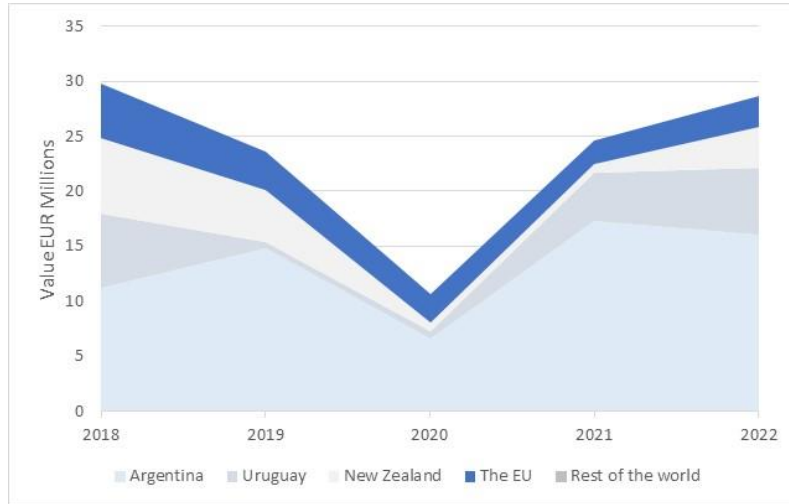
**0403 Buttermilk / curdled milk and cream / yoghurt**



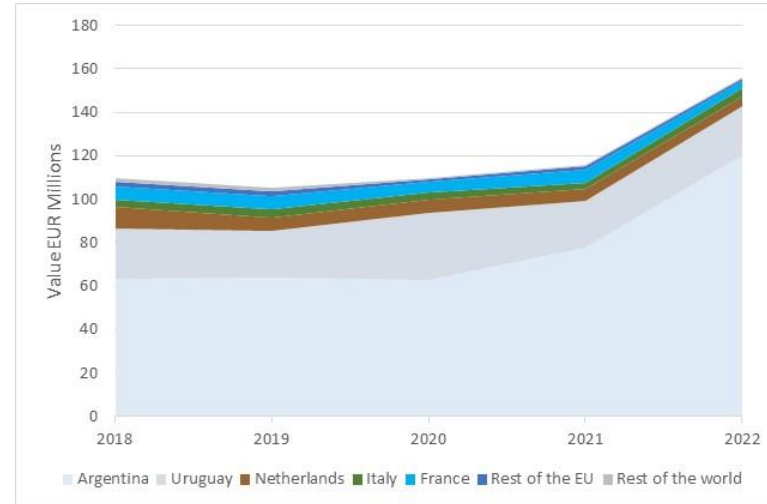
**0404 Whey/natural milk constituents**



**0405 Butter/dairy spreads**



**0406 Cheese**



Source: Trade Map, International Trade Centre – <https://www.trademap.org/>  
 CN codes in brackets.



## EU GI products

As noted in section 4.2.4, there is a register of protected GIs. Roquefort was included on the list available at the time of writing.

## Main competitors

Domestic dairy production for milk, butter and yoghurt is strong and results in Brazil importing a particularly small amount of these products from outside of its nearest neighbours. This in turn results in Argentina and Uruguay being typically the two largest exporters of most dairy products to Brazil in turn making these two countries the main competitors for EU dairy products in the Brazilian market. These two countries further benefit from free market access to Brazil by virtue of their membership in Mercosur.

## 5.3.4 Specific market entry requirements

### Market Access and Entry

The customs procedures for importing foodstuffs are set out in section 4.2.1. A full list of the general documentary requirements for export set out in Table 4-1, along with requirements by product category in Table 4-2. Requirements for dairy notably include: a certificate of analysis; inspection of agricultural products; registration of importers of agricultural products; registration of foodstuffs of animal origin; veterinary health certificate for animal products; and permit to import products of animal origin; with further requirements in certain cases. It is important to remember that, for animal origin products to be exported (including dairy), processing facilities must be approved. A searchable list of these is available at the following link:

[https://sistemas.agricultura.gov.br/pga\\_sigsif/pages/view/sigsif/consultahabilitacaoestrang/in dexEstabelecimentoEstrangeiro.xhtml;jsessionid=hrJGlpXDWXKqcJX1r8GbJGkqB6JCSnybq9JNP3JTfHQGT2p9m2NQ!988972512](https://sistemas.agricultura.gov.br/pga_sigsif/pages/view/sigsif/consultahabilitacaoestrang/in dexEstabelecimentoEstrangeiro.xhtml;jsessionid=hrJGlpXDWXKqcJX1r8GbJGkqB6JCSnybq9JNP3JTfHQGT2p9m2NQ!988972512)

In terms of tariffs, dairy products generally face between 10.8% and 28% tariffs, depending on the precise tariff line. Cheese for example faces either 14.4%, 18% or 28% tariffs. There have been some back and forth changes in tariffs in recent years, with some tariffs first removed, then re-introduced, and then temporarily increased by 5% on three specific products (including 1. blue mould cheese and other cheeses that use *Penicillium roqueforti* and 2. cheeses with a moisture content equal to or greater than 46% and less than 55% by weight - soft mass). Against this background, it is advisable to keep an eye on the tariff situation at the time of export.

**Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:**

**Main page – select product, country of origin and destination country:**

<https://trade.ec.europa.eu/access-to-markets/en/home>

**Example link – general cheese category (0406) from France to Brazil**

<https://trade.ec.europa.eu/access-to-markets/en/search?product=0406&origin=FR&destination=BR>

## Standards, SPS measures

Comprehensive information on the legislation relevant to animal products, including dairy products can be found at the following website of MAPA:

<https://www.gov.br/agricultura/pt-br/assuntos/inspecao/produtos-animais/empresario/registro-de-produtos-rotulagem>

This includes: technical regulations on the identity and quality, registration requirements and any additional labelling requirements for certain dairy products. It should be remembered that, as set out on that page, products and labels must be registered with DIPOA.

It is important to note that raw milk products and cheeses cannot be imported into Brazil.

## Labelling

As a general rule, dairy products must conform to the labelling requirements for packaged foods set out in section 4.2.3; as well as any specific additional requirements set out in the link above.

### 5.3.5 Distribution

As shown in Figure 5-13, store-based retailing is the main form of off-trade dairy product distribution in Brazil with small local grocers in the country accounting for 41.9% of dairy product sales in Brazil. Supermarkets are growing in importance and already account for just over a third of all sales with a share of 34.1% of sales. Hypermarkets finally stand as the remaining major distribution channel with a share of 14.6% of sales. Retail e-commerce remains largely in its infancy regarding the sale of dairy products and only accounts for 0.3% of sales.

There are some further nuances by product. More specifically:

- **Drinking milk:** The distribution of drinking milk is primarily focused on off-trade channels, although it is also used in foodservice establishments. A significant portion, approximately 98%, is distributed through grocery retailers, mainly through supermarkets, hypermarkets and small local grocers.
- **Cheese:** Cheese products find their way into the market predominantly through foodservice channels in Brazil although the off-trade distribution channel is also significant. Grocery retailers are virtually the only major distribution channel with a share of 99.9% of sales. Small local grocers account for 46% of sales, followed by supermarkets with a share of 33% of sales and hypermarkets with a share of 18% of sales.
- **Butter and spreads:** Within the off-trade retail sector, the sale of butter and spreads is heavily concentrated between small local grocers which account for 40% of sales, supermarkets which account for 38% of sales and hypermarkets which account for 11% of sales.
- **Other dairy:** The off-trade retail sector channel for other dairy products is largely influenced by small local grocers which account for a share of just over 40% of other dairy product sales, this is followed by supermarkets with a share of 40% of sales and hypermarkets with a share of 10%.

**Figure 5-13: Distribution channel overview of dairy in Brazil (2023); all dairy products; retail value**



Source: Euromonitor International: Packaged Food, 2023.

### 5.3.6 Challenges for EU products

Brazil stands as one of the largest producers of milk globally and borders other nations that have a significant milk-producing sector. To this end, the capacity to export milk to Brazil is very limited to mainly premium alternative milk products, which only cater to certain portions of the consumer base. The market in Brazil is price-sensitive, and rates of inflation have direct impacts on the performance of many dairy products in Brazil. This leaves a situation where many EU producers may find themselves subject to fiscal externalities outside of their control, which impact their product viability in the Brazilian market. Brazil imposes tariffs of varying degrees on dairy products that enter its market from the EU; and indeed in recent years, tariffs have changed multiple times, with a temporary increase on three tariff lines at present (two of which are cheese). This does mean there is a certain level of uncertainty around tariff rates for exporters. When these tariffs are combined with logistics costs, the price competitiveness of EU dairy products in Brazil is currently limited to catering mainly to upper-middle-income and higher-income earners in the country.

**Market Takeaway: Dairy**

**Consumption:** Milk, cheese and butter products are largely staple products within the Brazilian diet which translates to high per capita consumption rates for these products. Yoghurt products are quickly gaining ground in the country although other dairy product such as cream and fromage frais remain largely niche. As Brazil imposes tariffs on many major dairy products exported from the EU to the country (presently), coupled with inflation which only further influences what it already a largely price sensitive market, this leads to a situation where the main consumer group for EU dairy products are likely to be upper middle-income earners or high-income earners.

**Competition:** Domestic production is strong across most dairy products, and Brazil has the capacity to import any major shortfalls in the dairy sector from neighbouring Argentina or Uruguay, with which it shares a free trade area. Argentina in particular is a major dairy producer and stands as the main competitor for EU products outside of the large presence of domestic products. EU products tend to be regarded as premium; to this end, there is less competition as EU products, particularly those from France and Italy, are regarded as of a higher class of quality amongst most consumers compared to specialty dairy products produced domestically.

**Distribution:** Grocery outlets, such as small local grocers, supermarkets and hypermarkets are the main distribution channels for dairy products in Brazil. The food service sector is also a significant channel of distribution, particularly for cheeses, butters, and spreads.

**Challenges:** The influence of tariffs on EU dairy exports combined with the price sensitivity of the average Brazilian consumer leads to a situation where EU dairy exports largely only appeal to upper middle-income and higher-income earners in Brazil, although consumers hosting a social event or seeking to splurge will often also seek out EU dairy products. As Brazil, in its own right, is a major dairy producer, combined with the presence of other significant borders within its vicinity, the capacity for EU producers to cater to any production shortfalls or gaps in the market is quite limited.

**Opportunities:** Brazilian consumers increasingly appreciate yoghurt products, which represent one of the fastest-growing sectors in the Brazilian dairy market. Producers who incorporate additional nutritional content into their yoghurt products stand to particularly appeal to a Brazilian consumer base that is increasingly health- and fitness-conscious. Specialty premium cheeses and milks are growing in demand, and there is increasing awareness and appreciation for EU varieties of these products, particularly for French and Italian cheeses.

## 5.4 Wine

### 5.4.1 SWOT analysis

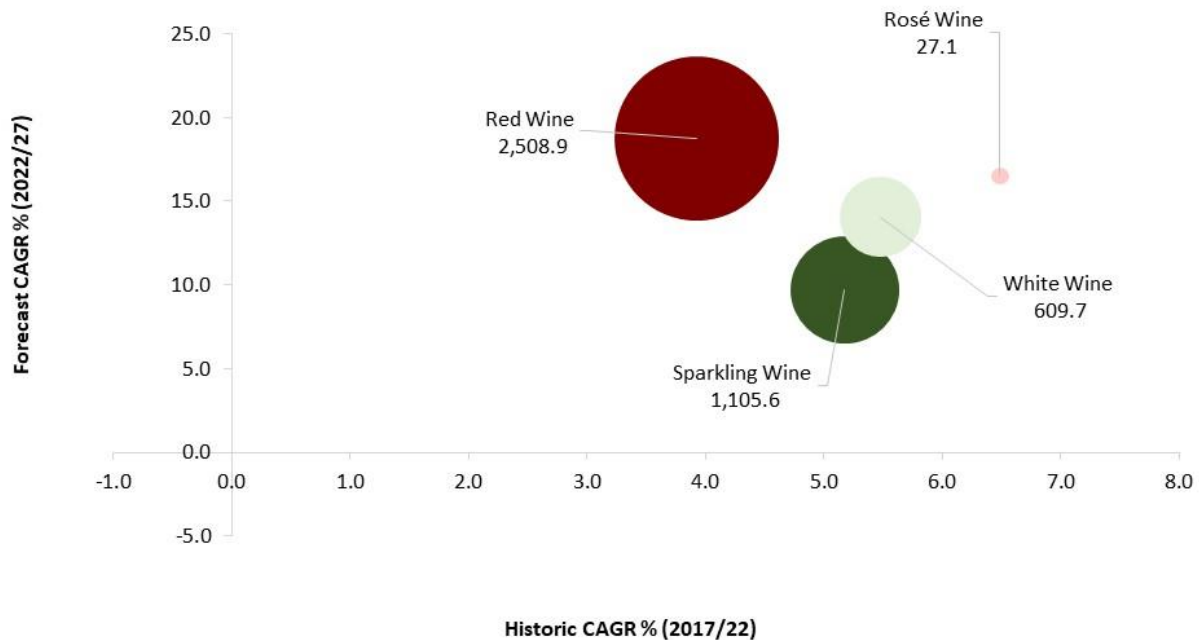
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> <li>▪ <b>EU wines</b> account for almost a <b>third of all wine imports</b> into Brazil, with a share of 32%.</li> <li>▪ <b>Wine consumption is growing rapidly</b> in Brazil, and most major wine product categories are expected to see double-digit CAGRs between 2024 and 2027.</li> <li>▪ Brazil is a <b>large net importer of wines</b>, and while domestic production is growing, it continues to not meet domestic demand.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Beer</b> is still the <b>preferred</b> alcoholic beverage in Brazil.</li> <li>▪ Brazilian <b>wine sales</b> are heavily <b>tied to the level of inflation</b> currently impacting consumers in the market.</li> <li>▪ <b>Rosé wines</b> are a <b>small</b> category in Brazil and remain largely niche.</li> <li>▪ <b>Logistics</b> and <b>tariffs</b>, plus other subsequent taxes result in <b>EU wines being much more expensive</b> than those of Brazil's neighbours.</li> </ul>
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> <li>▪ The <b>market for wine is growing</b>, and this comes with <b>increased demand for premium wines</b>, which many Brazilian consumers associate with EU wines.</li> <li>▪ The <b>economy of Brazil is improving</b>, and this is helping to keep inflation in check, with inflation <b>directly impacting the sales of wines</b> in the market.</li> <li>▪ The wine <b>market is evolving</b>, with <b>young consumers of increasing importance</b>. Tastes are also evolving with <b>emerging interest in the niche of rosé wine</b>.</li> </ul>	<ul style="list-style-type: none"> <li>▪ The <b>main competition</b> comes from neighbouring <b>Argentina and nearby Chile</b>, which are both major wine producers and have free market access to the Brazilian market.</li> <li>▪ <b>Domestic production is picking up</b> and Brazil has several climatic regions (particularly in the south of the country) with optimal conditions to produce wine.</li> <li>▪ There is <b>limited threats</b> from wines from the <b>US, South Africa</b> (which has an FTA with Brazil) and <b>Uruguay</b> (which has free market access by virtue of Mercosur).</li> </ul>

### 5.4.2 Consumption

#### Evolution of consumption

The wine market in Brazil was valued at around EUR 4.2 billion in 2022. Red wine is the largest segment, with a value of EUR 2.5 billion in 2022; sparkling wine follows at EUR 1.1 billion. White and rosé wine are much smaller niches, though arguably still significant in absolute terms at EUR 609 million and EUR 27 million, respectively. Total growth in the wine market of Brazil is expected to accelerate in the short term, with red wine expected to grow by a CAGR of 18.7% over the subsequent five years, followed by rosé wine, which is expected to grow by a CAGR of 16.5%, white wine, which is expected to grow by a CAGR of 14.1%, and finally sparkling wine, which is expected to grow by 9.7% (Figure 5-14).

**Figure 5-14: Evolution and forecast of wine market (million Euros) in Brazil, 2017-2027; total value.**



Source: Euromonitor International: Alcoholic Drinks, 2023.

## Consumers

In Brazil, the consumer groups for wine products are diverse, which reflects the range of different preferences, socioeconomic factors, and cultural influences. Some of the key consumer groups that stand out in this market include:

- **Traditional wine enthusiasts.** This group comprises consumers who have a deeper appreciation for traditional wine varieties. This group will be more likely to seek out high-quality wines from renowned international vineyards, making it a key consumer group for EU producers to target in the Brazilian market.
- **Emerging middle class.** With the middle class of Brazil continuing to grow, there is an increasing number of consumers who are becoming interested in wine. Wine in Brazil is often perceived to be a symbol of sophistication and social status. This group might be more price-sensitive but is likely to see wines of a reasonable price. Young urban professionals who further fall into this category will likely seek out trendy or innovative wine products, which is a key consumer group for sparkling wine producers in particular to target.
- **Health-conscious consumers.** A growing segment of consumers in Brazil are becoming ever more health-conscious, which is leading to an increase in interest in the low- and no-alcohol wine market and also in organic wines. Wines marketed as having health benefits or being produced via sustainable or environmentally friendly practices will resonate with this group in particular.
- **E-commerce and tech-savvy consumers.** The rise of e-commerce and online wine sales in Brazil (which now account for 13.4% of off-trade wine sales) has created a segment of consumers who prefer to purchase wines via digital platforms. This group is more likely to be influenced by online reviews and digital marketing campaigns,



which makes this consumer group more likely to explore a wider and more diverse range of wines.

Overall, the wider wine market of Brazil is growing rapidly, particularly within the larger urban centres of the country. While Brazil does not have the long-established wine-drinking culture of Argentina or Chile, the Brazilian market is expected to grow consistently in the short term.

Looking at consumers who are more likely to consume European wine or show the potential to consumer European wine, two groups in particular stand out:

- Younger, wealthier consumers with a strong interest in wine. This includes a group of consumers who are wine enthusiasts and actively seek out new wines. Contrary to what may be expected, this “exploratory” sub-group is often towards the lower end of wealthy.
- “Contented treaters” who may consume wine on a less frequent basis, but when they do consume, they treat themselves to premium products. They often have a good knowledge of wines.

The former of these two groups reflects the fact that, while the Brazilian wine market has traditionally been focused on older consumers, it is increasingly looking at younger consumers (under 35); with packaging and distribution channels evolving accordingly.

### Drivers and method of consumption

There are various key drivers behind the current and predicted growth in the wine market of Brazil; most notably the rising middle class of the country, which has allowed more consumers to afford to explore and indulge in wine consumption. Globalization to an extent is further driving growth as Brazil, a country where beer has been the alcoholic beverage of choice, has been more influenced by international trends, which aid in the consumption of alternative products – and in this case the consumption of wine. Home consumption is growing as consumers spent more time in the home during COVID-19, which resulted in an increase in demand for products that can be conveniently consumed in the home, aiding wine consumption. The return of tourists from Europe in particular but also from neighbouring Argentina and wider Latin America further acts as a driver of wine consumption in Brazil, as consumers, particularly European tourists, who numbered around 1.5 million in 2019, consume wine more regularly than Brazilian consumers at present.

Wine in Brazil is consumed largely at social gatherings and celebrations, and when dining out. Indeed there is a strong connection between the consumption of wine and that of food (whether a meal or an appetiser); consumption without food of some kind is quite rare. Home consumption is growing but is not as common when compared to other alcoholic beverages, particularly beer. Wine is increasingly consumed at cultural events, and wine tourism is growing in Brazil, which further aids overall consumption of wine in the country.

### Purchase criteria

In Brazil, a diverse range of consumer preference contribute to the overall outline of the key purchasing criterions for wine products. The key purchasing criteria include:

- **Price**, which remains a crucial factor for many Brazilian consumers; affordability plays a role in the purchasing decisions of most food and beverage products in Brazil, and due to the perception of wine as a premium product, price further plays a key role. In Brazil, there is a broad range of price points that aim to cater to the different budget segments available for consumers.
- **Brand reputation and variety**. For consumers who have a particular keen interest in wine products, the brand and wine variety will play a large role in their decision-making process about whether to buy a wine product. Preferences for wine styles like dry or



sweet wines or preferences for specific grape varieties are key purchasing criteria. The origin of the wine further contributes to its perceived quality, with wines of EU origin, particularly from France and Italy, being perceived as among the highest quality wines available to Brazilian consumers in the market.

- **Packaging and awards.** Packaging and labels are designs that are important visual elements that influence consumer purchases. Attractive labels, innovative packaging, and aesthetically pleasing bottle designs can capture the attention of the consumer and contribute to the overall appeal of the wine. Consumers further often consider awards, ratings, and reviews when making their wine purchases. Wines that have received accolades at international competitions or have a high rating amongst wine critics may be perceived to be of higher quality, which may help these wines garner more attention. Moving into the on-trade channel, recommendations from waiters and sommeliers can play an important role.
- **Flavour and type.** As seen earlier, red wine dominates the overall market in Brazil. There is an overarching appreciation of fresh, fruity, light and sweet wines in Brazil. Wines with higher acidity levels may struggle.

Overall, it is worth noting that Brazilian wine drinkers can be considered adventurous; over two thirds consider themselves to be open to trying new styles of wine – this can generally be considered much higher than the corresponding ratios in more mature markets. This means that there are opportunities for new products if the above criteria can be met. That said, very niche labels (e.g. biodynamic) may resonate with some consumers, but are likely to be lost on the mass-market consumer at this stage of development of the market.

#### **Wine on retailers' shelves in Brazil**

Approximate retail prices for wine are:

**Economy:** BRL 45 (EUR 8.30) and below per 750ml bottle. This segment covers around 80% of sales by volume.

**Mid-range:** BRL 45 - 75 (EUR 8.30 to 13.80) per 750ml bottle

**Premium:** around BRL 100 (EUR 18.50) per 750ml bottle

**Ultra-premium:** upwards of BRL 200 (EUR 37) per 750ml bottle

Wines are typically organised by origin, with the exception of promotional gondolas where wines of mixed origins can be found. Red dominates retail offerings, with white and rose wines placed separately. Generally between 75 and 95% of wines on sale are imported, with Argentinian and Chilean wines having a particularly strong presence. Imported wine covers the whole range of segments; though European wines tend to skew towards the premium segment and above (with some mid-range products also available).



*Above: wines arranged by origin in two different southern supermarkets. A more spacious selection (left) and a more eclectic selection (right).*

In terms of packaging, 750ml glass bottles are the norm, and there is a preference for larger corks. With wine often a status symbol, labels which communicate status (e.g. featuring castles and using the colour red) tend to go down well. While bottles are dominant, there is growing interest in cartons / bag in box and in cans.



*Above: various wines using label imagery to communicate sophistication.*

The use of price promotion for wine (whether reductions on single bottles; second bottles at heavily discounted prices; or 4 for the price of 3 offers) is quite common.

*Below: promotional offers in two different supermarkets.*





Images © Euromonitor International / Agra CEAS, 2024.

### Recent market trends

Wine is expected to grow by double digits across all major categories in coming years, reflecting Brazil's growing interest in wine products as well as the rise of low- and no-alcohol products in general. The resurgence of socialization, particularly around celebratory occasions like birthdays and holidays, boosted wine sales. The hotter weather encourages the consumption of chilled or iced wines, making sparkling, rosé, and white wines more appealing to Brazilians than still red wine during the Brazilian summer months. Rosé and sparkling wines are expected to gain traction in the future (albeit from small bases) as they meet changing consumer preferences. These categories are easily adaptable to new formats and packaging, such as canned wine, which has yet to realize its full market potential in the country. Indeed, the use of such packaging, alongside innovative labelling and marketing, may be one way of differentiating rosé wines from more popular red and white. In view of rosé's relative novelty in Brazil, educating consumers and emphasizing the refreshing qualities are further strategies which may help these products to stand out. Rosé and sparkling wines are products that are strongly associated with social gatherings and appeal to consumers who want to reduce their alcohol consumption or prioritize health and wellness.

Consumers in Brazil have long struggled with inflation, and wine is no exception. This steady rise in prices was largely influenced by international demands and pressures, particularly those related to energy costs in European countries. However, Brazilian wine production, which was less affected by the international market, was able to compensate for and even increase production and consumption. Another notable development in 2022 was the stabilization of Brazil's glass industry, which saw companies increase their investments in industry expansion. This helped to stabilize a major component of wine pricing, resulting in cost savings. In summary, while wine in Brazil has managed to navigate some of the challenges posed by inflation and stabilize certain aspects of pricing,

the overall economic situation and consumer preferences present ongoing challenges for the domestic industry.

Wine has traditionally been marketed to an older consumer demographic in Brazil, whether due to income or positioning strategies. Furthermore, the category has seen limited innovation in terms of product variety, implying that innovation efforts have primarily focused on channels, packaging, and communication. In Brazil, wine producers have quickly adapted to e-commerce, but packaging options have largely remained focused on glass, despite successful examples of carton and can packaging in neighbouring countries such as Chile and Argentina. Wine producers operating in Brazil are increasingly targeting beer-drinking consumers, as this represents the largest alcohol-consuming consumer group in Brazil. Initiatives such as the continuous introduction of wines in cans and offering a lower price point are aiding wine producers operating in Brazil to target this key consumer group.

While social consumption is key, Brazilians are increasingly choosing to enjoy their favourite wines within the comfort of their own homes. This trend reflects a growing appreciation for the versatility and convenience of at-home experiences, where individuals can explore a diverse range of wines, often in the company of friends or family. A parallel recent trend of note is the growth of wine bars in larger cities. Some producers have tried to capitalise on this trend by using wine bars as a way of helping consumers match their wines to Brazilian dishes. Indeed, the pairing of wine with Brazilian dishes is something that certain producers have placed an increased focus on recently. Examples include suggestions to pair *feijoada* (a traditional Brazilian black bean and meat stew) with more full-bodied red wines. Against the background of wine in Brazil being frequently consumed with food, this increased focus on suggesting pairings can be considered logical.

Finally, there have been some further recent evolutions in terms of distribution. It has become increasingly popular for wine to be sampled at stores (both specialist stores and supermarkets). The subscription club model of wine distribution has also become increasingly common, with ranges of wines being delivered to consumers doors. VivaVinho and Confraria Grand Cru are two examples of companies offering subscription club models which include imported wines.

### 5.4.3 Offer

#### Domestic production

Brazil is the third-largest producer of wine in South America, behind Argentina and Chile. It is estimated that Brazil will produce around 3.2 million hectolitres of wine in 2023. The major wine-producing regions of Brazil are in the southern regions of Brazil, particularly within the state of Rio Grande do Sul and the regions of Serra Gaucha and Campana. Serra Gaucha, which has a particularly high population of Italian descent, is the heart of Brazilian wine production and is known for producing some of the highest-quality wines of Brazilian origin. Other notable wine-producing regions include Serra do Sudeste, Campos de Cima da Serra, and Planalto Catarinense, which each have their own characteristics contributing to the diversity of Brazilian wines. However, the majority of wine produced in Brazil is table wine made from varieties other than those predominant in Europe (*vitis viniferas*); leaving big gaps for imported wines.

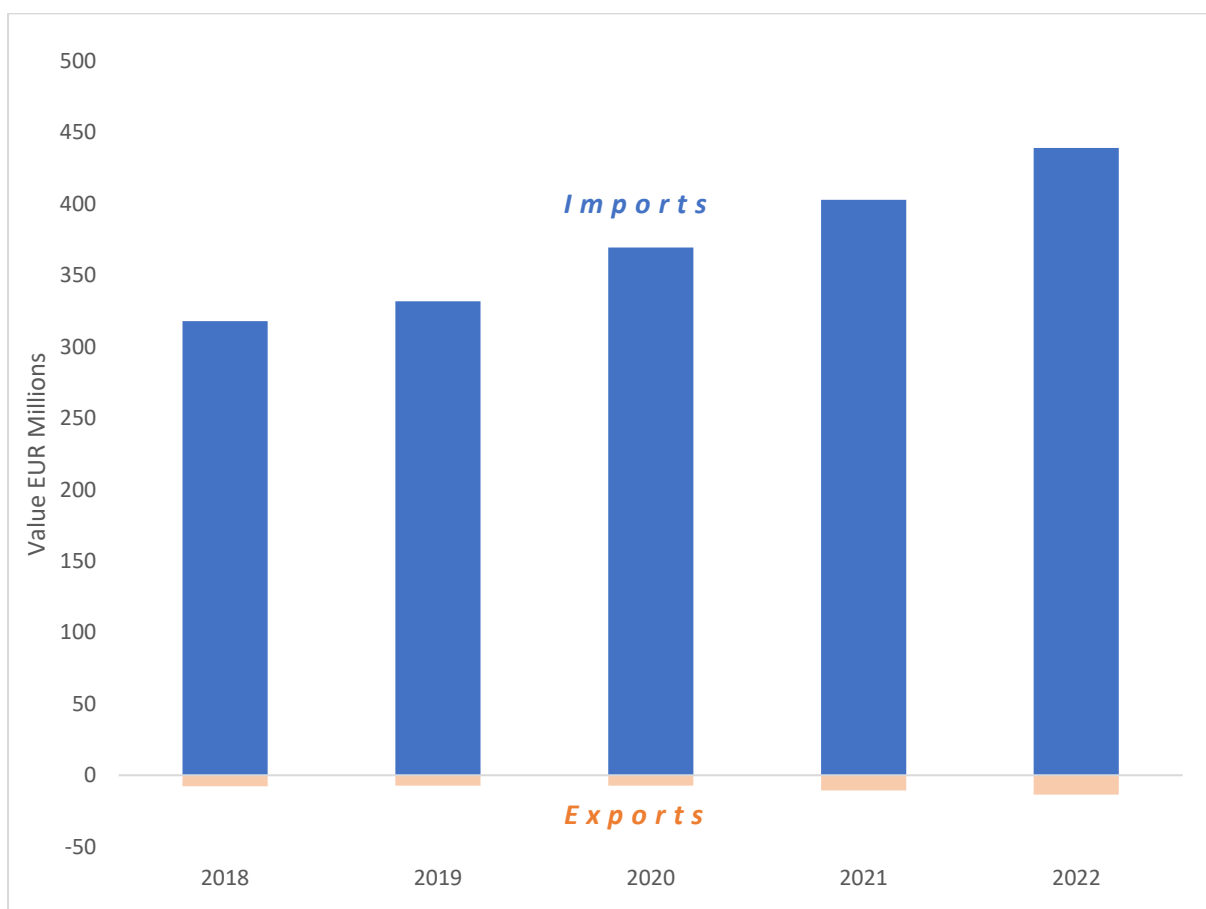
The Brazilian wine industry is composed of a mix of small, family-owned wineries and larger cooperatives. Some wineries have been investing heavily in the modernization of their facilities to enhance the quality of their wines. The largest companies in operation in the Brazilian market more broadly at current are Co-operativa Vinicola Aurora Ltda (share of 7% of the market), followed by Vinhos Salton SA Industria e Comercio (just under 7% share of the market), and finally Vinicola Miola Ltda (4% share of the market). The rest of the Brazilian

market is made up of smaller producers and importers with limited market share, resulting in the Brazilian wine market being heavily fragmented and competitive.

### Imports and exports

Brazil is a very strong net importer of wine, as shown in Figure 5-15. The level of imports has been increasing since 2018; in 2022, the value of imports was EUR 439 million, which represents a growth of around 20% from 2018. Total exports have grown but represent a small overall value at around EUR 13 million, which further suggests that most of Brazil's domestic production of wine is centred around catering to the domestic market.

**Figure 5-15: Trade balance (imports and exports) of wine in Brazil, 2018-22, EUR millions**



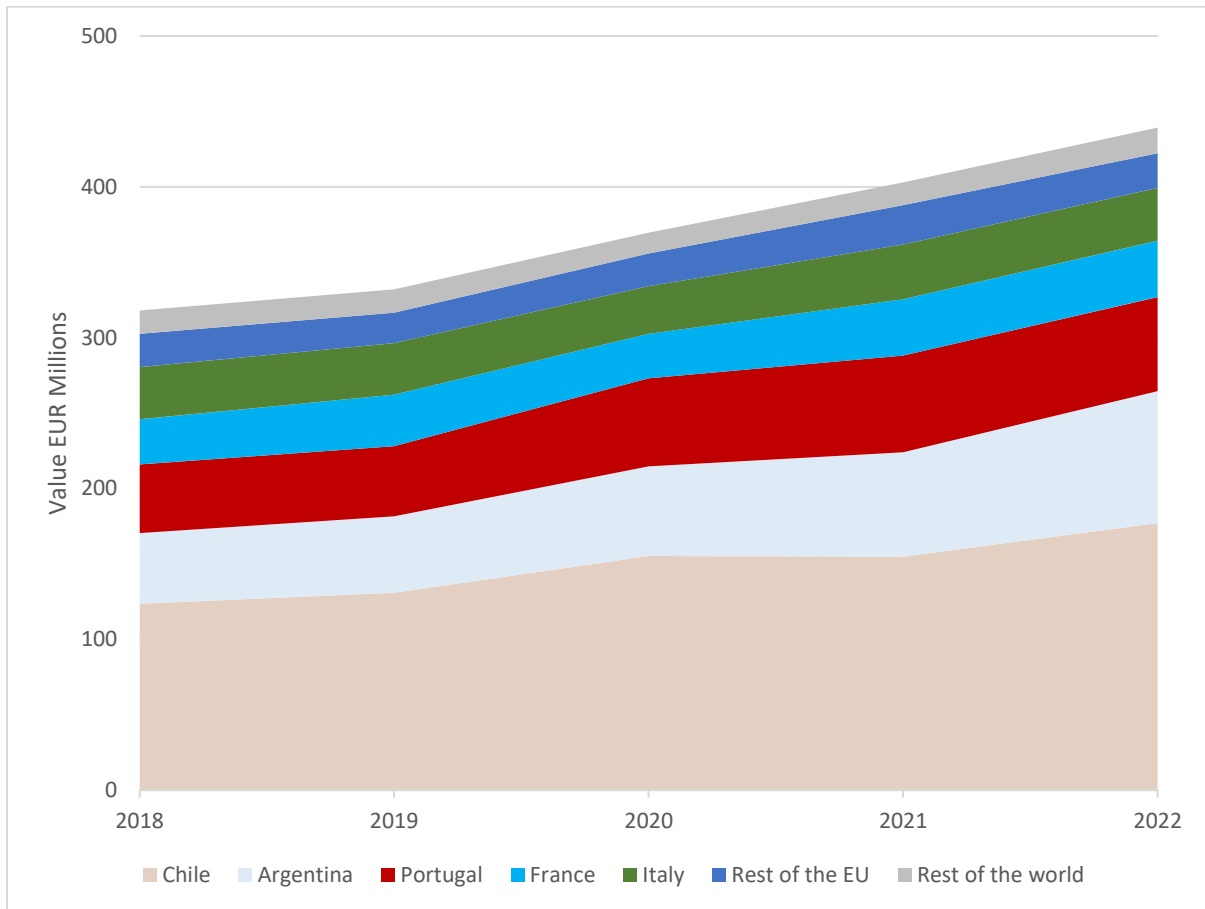
Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 2204.

Chile was the main origin of wine exports to Brazil in 2022, with an imported value of EUR 177 million; the country accounted for close to a third of wine imports. This was followed by Argentina, with a value of around EUR 87 million, and Portugal, with a value of EUR 62 million. (Figure 5-16). French exports came to a value of EUR 37 million, followed by Italy's value of EUR 35 million. Imports from the rest of the EU came to a value of EUR 22 million, with EUR 21 million of this figure coming from Spain.



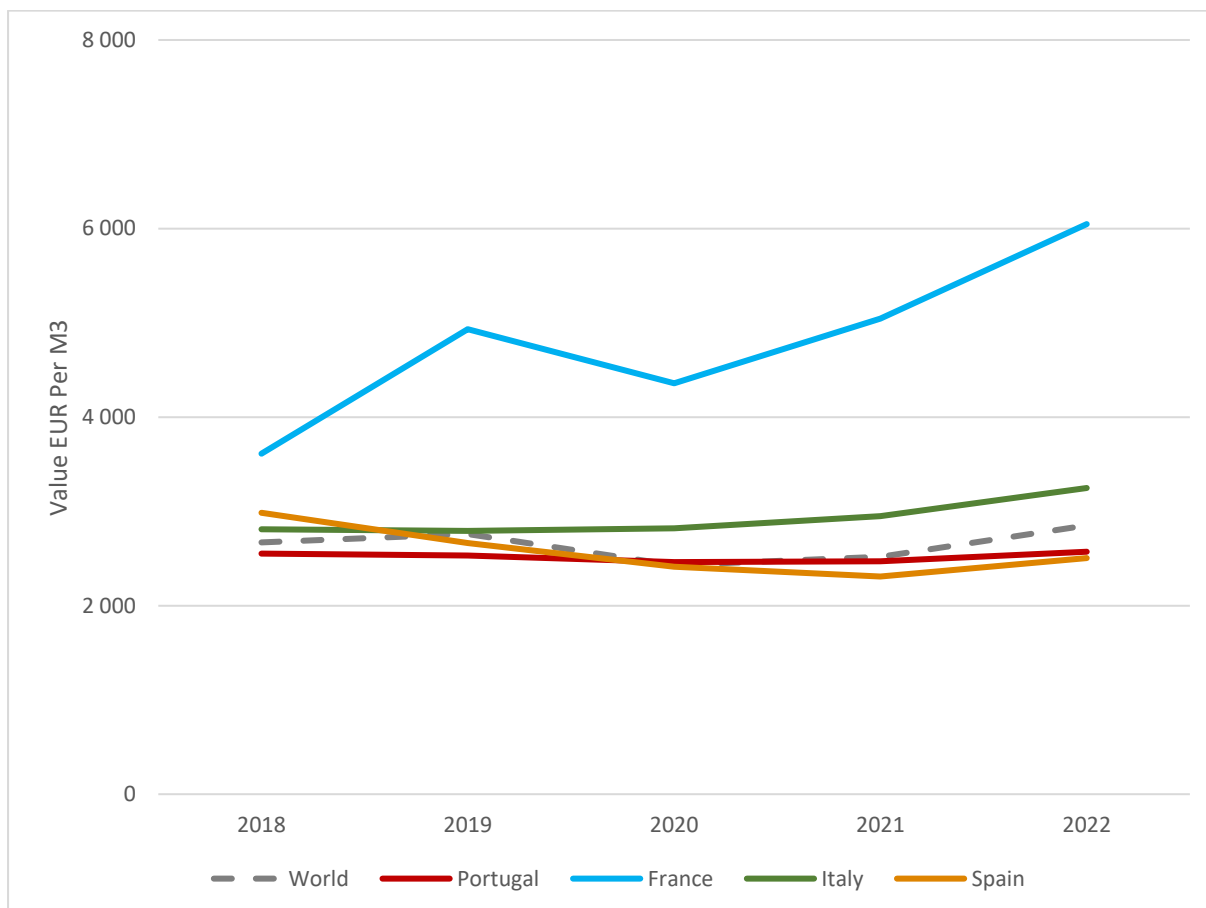
**Figure 5-16: Brazilian imports of wine by country, 2018-22; EUR millions**



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 2204.

French wines had the highest export unit value price point for wines in the Brazilian market, with a unit value of just over EUR 6 000, which is close to double that of the global average, of EUR 2 850. Portuguese wines came to a unit value of EUR 2 550, which is close to Spain, which has a unit value of EUR 2 500. These two member states represent the biggest exporters of EU wines to Brazil, with a lower unit value than the global average. Wines from the biggest exporter, Chile, came to a unit value of EUR 2 550, with Argentinian wines coming to a value of EUR 3 000 (Figure 5-17).

**Figure 5-17: Brazilian imports of wine by country, 2018-22; Unit value EUR per m3**

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 2204.

### EU GI products

As noted in section 4.2.4, there is a register of protected GIs. Some wines (including French and Portuguese ones) were included on the list available at the time of writing.

### Main competitors

The main competition for EU wines come directly from Chile and Argentina which are the two biggest and by far most influential wine producers in South America. Both countries also have direct free market access to Brazil by virtue of Mercosur (Argentina) and a free trade agreement between Mercosur and Chile. There is limited competition from Uruguay, The US and South Africa although the major producers of the EU continue to send more wines by export value to Brazil.

## 5.4.4 Specific market entry requirements

### Market Access and Entry

The customs procedures for importing foodstuffs are set out in section 4.2.1. A full list of the general documentary requirements for export set out in Table 4-1, along with requirements by product category in Table 4-2. Requirements for wine notably include: registration of importer

of beverages; permit to import wine; certificate of origin for beverages, fermented acids, wine, products derived from grape wine; an import inspection certificate for beverages; and a certificate of maturation. Other requirements may also apply.

In terms of tariffs, wines generally face ad valorem tariffs of 16%; in a few cases they face 27% tariffs.

**Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:**

***Main page – select product, country of origin and destination country:***

<https://trade.ec.europa.eu/access-to-markets/en/home>

***Example link – general wine category (2204) from France to Brazil***

<https://trade.ec.europa.eu/access-to-markets/en/search?product=2204&origin=FR&destination=BR>

### Standards, SPS measures

There are various pieces of legislation which regulate the standards for wine. Details on these can be found at the following link:

<https://www.gov.br/agricultura/pt-br/assuntos/inspecao/produtos-vegetal/legislacao-de-produtos-origem-vegetal/bebidas>

It should be noted that there are some challenges with quality requirements and certifications for wine; though changes to both these areas may be forthcoming in the foreseeable future. More details were provided in section 4.3.4.

### Labelling

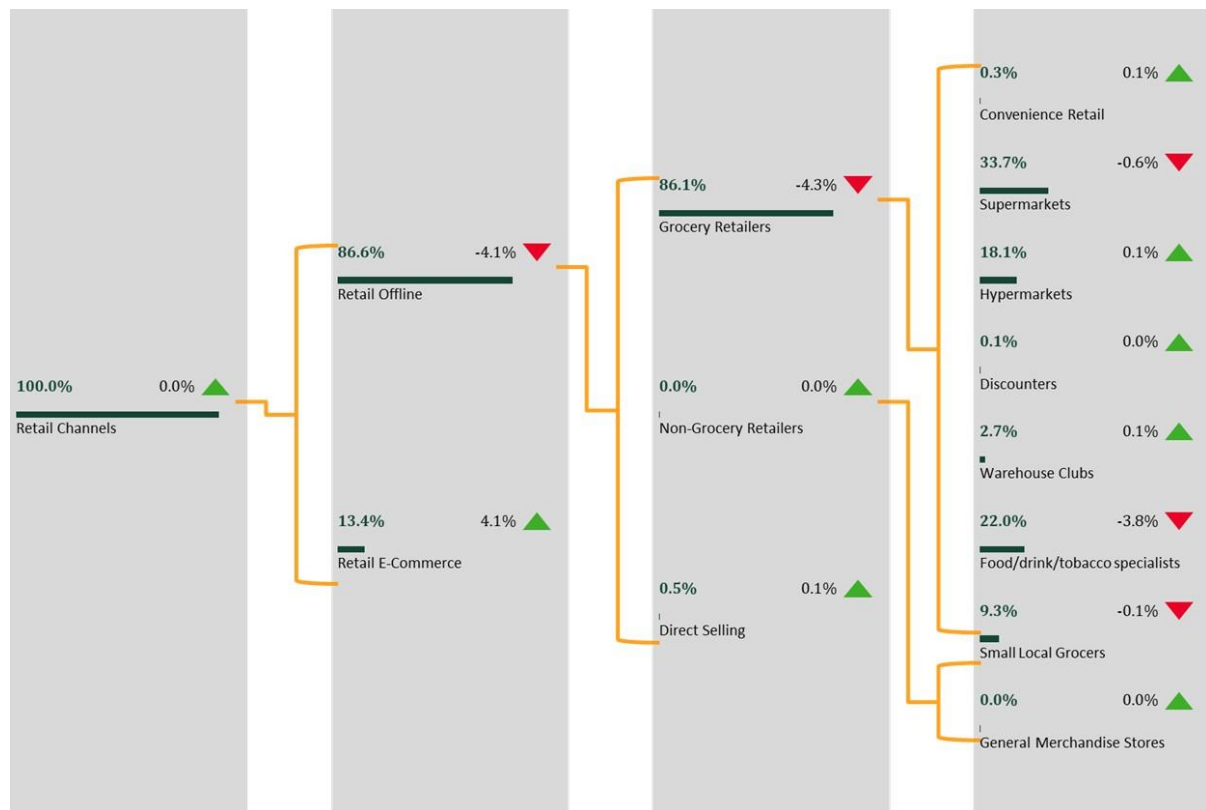
Wine must conform to the labelling requirements for packaged foods set out in section 4.2.3. This notably includes:

- Percentage of alcohol content
- The warning: “Avoid excessive consumption of alcohol”.

### 5.4.5 Distribution

Most wine by volume is distributed via the off-trade sector which accounts for 78.4% of wine sales in Brazil. Grocery retailers are the main retail distribution channel in Brazil accounting for 86% of all sales. The main channels within this category were supermarkets which account for a third of sales, followed by food/drink and tobacco specialist stores which account for 22% of sales and hypermarkets with a share of 18% of sales. Retail e-commerce is a key channel of distribution and now accounts for 13.4% of sales, this channel will likely continue to expand in Brazil and a larger segment of consumers become more accustomed to online e-commerce retailing.

Figure 5-18: Distribution channel overview of wine in Brazil (2022); off-trade volume



Source: Euromonitor International: Alcoholic Drinks, 2023.

### 5.4.6 Challenges for EU products

Brazilian consumers continue to prefer beer as their alcoholic beverage of choice and the price sensitivity of Brazilian consumers further present challenges for wine in general. For EU wines, the issue with prices is further accentuated; they face a tariff rate of 16% when entering the Brazilian market; and once the accumulated taxes on imports of alcoholic beverages are combined with other factors such as logistic costs, the retail prices to consumers of EU wines in Brazil can be several times the comparable retail price in origin. While closer competitors such as Argentina and Chile face the same accumulated taxes, they have advantages in terms of tariffs and logistical costs which make their retail prices in Brazil much closer to their domestic retail prices. In an attempt to address the price imbalance and make products more price competitive, some EU exporters are understood to have looked at exporting wine in bulk; though this can have impacts on the possibility to use geographical indications.

Wine is perceived to be a luxury product and while some consumers are increasingly seeking out premium products, those products that are not perceived to be staple are usually the main products impacted by inflation in Brazil; therefore, the competitiveness of EU wines in the Brazilian market is highly tied to the level of inflation and currency fluctuation which makes long-term planning difficult. Brazil also borders or is within the vicinity of major wine producer such as Argentina and Chile which have free market access to Brazil and are more likely to be able to offer their high-quality wines at a price point that appeals to a wider scale of the Brazilian consumer base. Domestic production is also growing but unlikely to present a major challenge for EU wines in the premium wine market of the country in the short term.

### **Market Takeaway: Wine**

**Consumption:** *The wine market is growing rapidly with double digit CAGR predicted for most major wine categories in the short term. Wine remains mainly consumed amongst older, urban, and tourist consumers although the emerging middle class and rising health consciousness amongst consumers is opening up new consumer groups in the market.*

**Competition:** *Mainly from Argentina and Chile which have direct free market access into Brazil, combined with a well-established wine production base. Limited competition emerging from domestic production as well as wines from Uruguay, South Africa and the US.*

**Distribution:** *Off-trade sales account for 78.4% of sales with grocery retailers accounting for 86.1% of sales. The major channels for distribution in this category include supermarkets (34% of sales), food/drink and tobacco specialists (22% of sales) and hypermarkets with a share of (18% of sales). E-commerce is emerging as a key channel of sales and now accounts for 13.4% of sales.*

**Challenges:** *The continued preference for beer as the alcoholic beverage of choice coupled with Brazil having free market access with major wine producers Argentina and Chile stand as the major challenges for EU wines; as does, the current tariff rate of 16% of EU wines which when combined with other factors makes EU wines less price competitive in the Brazilian market.*

**Opportunities:** *Rising awareness and appreciation of wine in Brazil is helping to accelerate the growth of most major wine categories which stand to grow at a double digit CAGR over coming years. Consumers are getting younger and preferences are evolving, creating opportunities for new wines.*

## 5.5 Spirits

### 5.5.1 SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> <li>▪ Spirits are the <b>second most commonly consumed alcoholic beverage in Brazil</b> and consumption of each major spirit category is expected to grow in the short term.</li> <li>▪ <b>EU exports</b> account for <b>12.5% of all spirits imported</b> by Brazil.</li> <li>▪ <b>Brazilian consumption of whisky and vodka continues to grow</b>, which in turn drives curiosity surrounding premium (often imported) variants of these products amongst consumers.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Sugarcane distilled spirits</b> remain the <b>most popular</b> spirits in Brazil, particularly cachaça.</li> <li>▪ A <b>16% tariff rate</b> remains for EU spirits exported to Brazil.</li> <li>▪ Consumption of <b>no-low alcoholic spirits</b> remains <b>minimal</b>, and these products have yet to penetrate the market in any impactful way as of yet.</li> </ul>
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> <li>▪ <b>Partnering with on-trade establishments</b>, particularly during a major cultural or traditional event or festival will help EU producers gain a foothold in the market.</li> <li>▪ There is a <b>growing market for brandy and cognac</b> which has not seen the same level of domestic production growth compared to other spirit categories.</li> <li>▪ Levering the <b>brand and quality of EU spirits</b> in the marketing of these products to Brazilian consumers is a key opportunity area for growth.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Domestic production</b> of conventional spirits products is <b>growing</b>, as is the production of <b>craft premium spirit</b> products.</li> <li>▪ <b>British and American spirits</b> are the biggest exporters of Spirits to Brazil and are the biggest threat for EU products.</li> <li>▪ <b>Counterfeiting</b>, the <b>logistical</b> challenges of operating in Brazil and <b>currency fluctuations</b> all threaten long term viability for spirit producers in the market.</li> </ul>

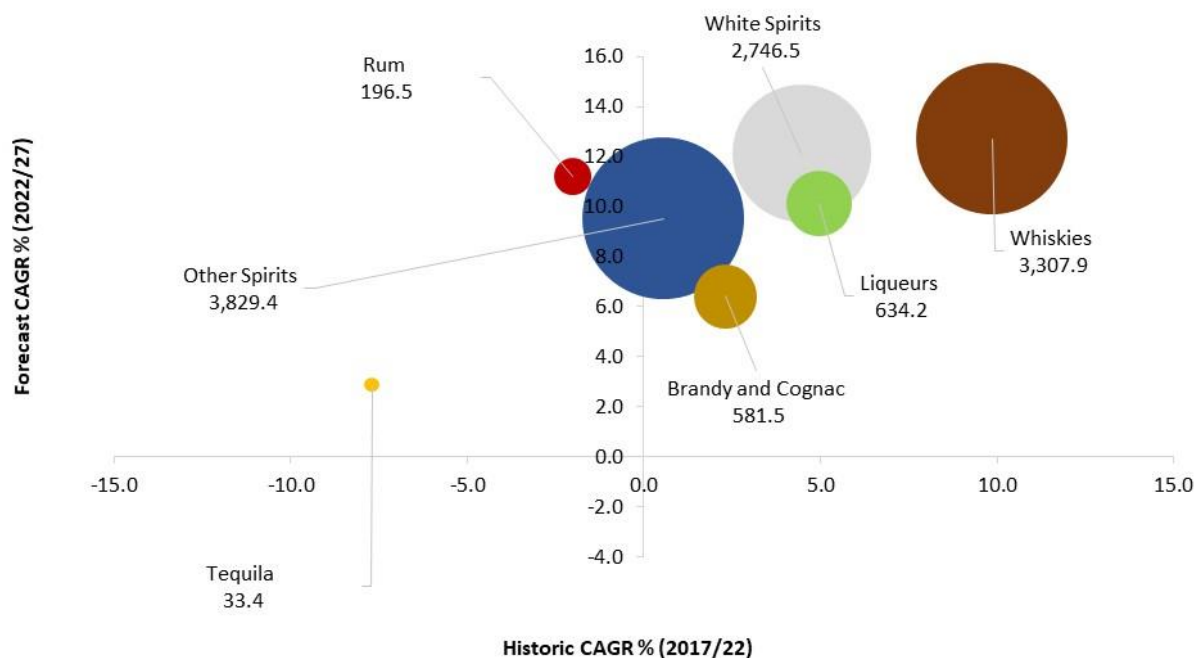
### 5.5.2 Consumption

#### Evolution of consumption

The spirits market in Brazil had a total value as of 2022 of around EUR 11.3 billion, with the other spirits category being the largest by market size with a value of EUR 3.8 billion. Whiskies follow on with a total value of EUR 3.3 billion; white spirits make up the last of the largest product categories in the Brazilian spirits market, with a total retail value of EUR 2.7 billion. Liqueurs account for a retail value of EUR 634 million; brandy and cognacs have a retail value of EUR 581 million; rum has a value of EUR 195 million; and finally, tequila has a value of EUR 33.4 million. Each spirit category is expected to register growth rates over the subsequent five years, with the fastest-growing spirit category anticipated to be whiskies, which are predicted to grow by a CAGR of 12.7%. The second fastest spirit category is expected to be white spirits, which are forecast to grow by a CAGR of 12.1%, followed by rum, which is expected to grow by a CAGR of 11.2%, liqueurs, which are expected to grow by a CAGR of 10.1%, and other spirits, which are expected to grow by a CAGR of 9.5%. Total growth rates from brandy and cognacs are expected to be smaller, with a forecasted CAGR of 6.4%, followed by tequilas, which will remain largely niche in the Brazilian market, with a total predicted CAGR of 2.9% anticipated (Figure 5-19).



**Figure 5-19: Evolution and forecast of spirits market in Brazil, 2017-2027; total value, EUR millions.**



Source: Euromonitor International: Alcoholic Drinks, 2023.

## Consumers

The consumer market for spirits in Brazil is large and encompasses a wide number of different consumer groups with varying tastes and desires regarding their spirits products. Spirits are the second most consumed alcohol beverage in Brazil in pure alcohol terms, ahead of wines but behind beers. Each major spirit product comes with its own particular consumer group of interest which is outlined below:

**Other spirits:** The other spirits category is predominantly made up of distilled fermented sugarcane juice spirits with the most popular being *cachaça* (used in *caipirinha*). *Cachaça* is the most popular spirit consumed in Brazil and is often regarded as the national spirit of the country. Consumers of *Cachaça* vary as some will prefer different types of flavours and regional variations. Traditionalists are likely to seek out *cachaça* also ahead of other major spirits further in line with the products position as a cultural product of Brazil.

**Whiskies:** A segment of the whisky consumer base will be whisky enthusiasts; this consumer group will likely have higher disposable incomes and will be the premier consumer group to seek out premium imported whiskies. The popularity of whisky among younger, urban, consumers is growing driven by growing appreciation for craft spirits in Brazil.

**Vodka:** Vodka is intrinsically linked to nightlife culture in Brazil, attracting consumers who enjoy socialising in bars and clubs. Vodka's neutral flavour allows for consumers to make more versatile choices for a wider mix of cocktails which appeals to consumers. Young urban consumers are the main consumer group for vodka; this group particularly appreciates flavoured vodkas and creative vodka-based cocktails.

**Liqueurs:** Liqueurs in Brazil appeal to consumers who appreciate sweet spirit products such as pineapple liqueurs and passion fruit. Coffee liqueurs are also particularly popular in Brazil and consumers appreciated the usage of local produce within their spirits of choice. The main

consumers of liqueurs in Brazil are those seeking alternative products to other more mainstream options in Brazil such as cachaça and vodka.

**Brandy and cognac:** Brandy and cognac consumers tend to be older or have higher disposable incomes and these products are often priced at a higher unit price compared to other spirits in Brazil. Consumers associate brandy and cognacs with prestige and luxury and will drink it pure as mixing is not considered suitable for these products.

**Rum:** Rum consumers tend to be consumers who particularly appreciate the nicheness and unique flavours attached to rum, as the spirits is not viewed as a conventional spirit consumed in the Brazilian market. Aged rum appeals to older consumers who appreciate the complexity and depth of aging that goes into the production of these products.

As a general rule, imported spirits will be seen more as a status drink, and hence consumed by the mid and higher income subsets of consumers in the case the product category is not already limited to this group (as is the case e.g. with whisky). While alcohol and spirits consumption as a whole skews slightly towards the young consumer, the importance of older consumers for imported spirits tends to be slightly greater than for spirits as a whole.

### Drivers and methods of consumption

There are several key drivers that influence spirit consumers in Brazil. These drivers are often influenced by cultural, economic, and social factors. Brazil has a rich cultural heritage which lends itself towards hosting numerous traditional celebrations, festivals, and social gatherings. Cachaça is commonly consumed on more traditional celebrations. Consumers seeking out versatile spirits are drawn particularly towards vodka and rum, with vodka being the far more popular of the two. Consumers appreciated the ability to experiment with these spirits which appeals to a Brazilian consumer base with access to numerous fresh fruits and recipes. Affluent consumers are more likely to seek out premium and imported spirits with the sophistication and quality of these products acting as key drivers; with cognac and whisky benefitting from this. There is a grown health consciousness trend in Brazil which is driving demand for low and no-alcohol spirit products, particularly within urban centres of the country.

Spirit consumption is common during social activities and for consumers who enjoy the nightlife of Brazil. Indeed, historically spirits consumption has been driven primarily by the on-trade channel, with roughly 2/3 of spirits by volume consumed through this channel prior to the Covid-19 pandemic. While this has subsequently fallen and is unlikely to recover to a similar level till around 2027 – with inflationary pressures making at-home drinking popular - on-trade remains an important driver of spirits and hence channel for introducing imported spirits. Brazilian consumers typically used the expression *Saude* as an English equivalent to cheers when toasting before consuming a spirit beverage. Cachaça is usually consumed with sugar and lime (as caipirinha); vodka is commonly mixed into a flavour of the consumer choice; rum is often mixed with cola and lime; while whisky, brandy and cognac tend to not be mixed as consumers purchase these spirits for their pre-existing tastes and qualities. Many liqueurs are bought pre-mixed with an additional flavour such as fruits or coffee.

### Purchase criteria

Brazilian consumers consider several factors when deciding to purchase a spirit beverage. Firstly, brand and reputation play a key role. International brands (particularly larger EU-US-UK ones) will come with enhanced expectations surrounding the quality and packaging of the product; and upper middle income and higher income earners who are the main consumer group of imported spirits will likely purchase them to celebrate a social event or to consume at home. Nonetheless, it should be noted that consumer awareness of imported spirits other than whiskies tends to be quite low, meaning that work on the brand to develop recognition may be needed. In this context, it is not uncommon for producers to use omnichannel

activations and marketing partnerships in order to build familiarity with less known products. This is unsurprising given the importance of the on-trade channel for spirits. Indeed, in view of the importance of on-trade, some products use distinct on-trade packaging in order to make their product stand out and be more memorable.

Price point plays a key role, while some consumers may be willing to invest in premium and imported spirits for special occasions, others may prioritise more budget-friendly options for regular consumption. The flavour profile of a spirit is also important, Brazilian consumers appreciate the neutral flavour of vodkas which lends itself towards allowing consumers to be more creative in how they mix and create their cocktails of choice. Cultural considerations play more of a role for the sale of cachaça with this purchasing criterion likely to play a greater role during national holidays or carnival. Other purchasing criteria of note include promotions and discounts within retailers, recommendations and reviews and celebrity endorsements and influencer marketing.

### Spirits on retailers' shelves in Brazil

Approximate retail prices of spirits in Brazil are:

- **Mid-range:** around BRL 60 (EUR 11) for 700ml
- **Premium:** around BRL 100 (EUR 18.50) for 700ml
- **Super-premium:** around BRL 200 (EUR 37) per 700ml, with ultra-premium above this.

Looking at key imported spirits categories:

- Rum and vodka are heavily weighted towards the mid-range segment, though there are notably economy and super premium niches.
- In the whisky segment, around 40% of sales target the midrange segment and 40% the economy segment; with the majority of the balance fitting in the premium segment.
- Gin is divided almost entirely between the standard segment (around 60% of volume) and the super/ultra-premium segment (35%).





*Above left: gin and vodka section of a supermarket in Recife, with a wide range of products. Right: another supermarket in the south, with arrangement more by brand.*

The method of arrangement of imported spirits varies. Often they are arranged by type (e.g. whisky, vodka, etc); but in some cases organisation is by brand with no clear separation between spirit types.

The presence of imported spirits on shelves varies by retail outlet. Its share can reach up to 80% of shelf space in retailers more geared up towards premium imported products, but more frequently will be around the 50% mark. While imported products are more likely to target the premium segment and above, some mid-range products can also be found.



*Above: gourmet supermarket in Sao Paulo with a wide range of imported spirits.*

While 700ml bottles are the most common format for imported products, 750ml bottles are also popular. There are some smaller (500ml) and larger (1 litre) products on sale. This is different from the situation for spirits as a whole, where 350ml is the most common format.

Below: other spirits (vodka displayed) separated from popular *cachaça*.



Images © Euromonitor International / Agra CEAS, 2024.

### Recent market trends

The following recent market trends can be observed in the Brazilian spirit's market:

- **The re-opening of the on-trade sector** in Brazil post-Covid-19 has proven crucial to the overall performance of spirit products in the Brazilian market over the last couple of years as on-trade establishments account for a share of 64% of distribution. Total growth and volume sales of spirits noticeably dipped between 2020-2021 because of the pandemic however have since largely fully recovered to pre-Covid-19 levels of sales.
- **Pre-batched spirits are rising in popularity.** Despite riding the wave of the return to socialising, with the on-trade channel facing financial difficulties, companies looking to enter this channel may need to reconsider their strategies. The growing popularity of cocktails creates an opportunity for pre-batched mixes, which are increasingly in demand, especially at events, nightclubs, and parties. These pre-mixed options enable establishments to consistently produce high-quality drinks by adding any mixer which is commonly demanded by consumers.
- **Whiskies experiencing rapid growth in Brazil.** Whiskies saw rapid total volume growth in Brazil over the last couple of years, despite challenging macroeconomic conditions and Brazilian consumers' income constraints. Large producers have invested heavily in the market in recent years, making a variety of efforts to connect their products to Brazilian consumers, including incorporating Brazilian iconography and symbols into their packaging designs.
- **Gin and rum** products in Brazil have grown in popularity in recent years, thanks to Brazilian gin producers who have used their experience distilling Brazilian *cachaça* to create exceptional gins. Brazilian gins have achieved remarkable success in terms of sales and quality, winning numerous international awards and accolades. Rum, which remains a relatively niche spirit in Brazil, continues to grow in



awareness and a number of craft rum producers have emerged in the market in recent years which has aided awareness around the product.

- **Development of at-home bars.** As mentioned above, while on-trade remains popular and accounts for the majority of spirits consumption, its level remains below the pre-pandemic level, with pricing pressures making home drinking attractive for many consumers. As part of this, some consumers (often more affluent ones) are building home bars and populating them with expensive spirits – often whisky and cognac - but also sometimes other spirits for home cocktail mixing.
- **The use of local flavours in non-traditional spirits.** There is an increasingly popular trend to include flavours and infusions that add a distinctly Brazilian flavour to drinks such as gin and whisky. In gin, for example, products with Brazilian fruits and herbs such as *açaí*, *pitanga*, *guarana*, *cerrado* (cerrado vanilla), *erva mate* and *pinhão* have been used. In whisky, local distillers have made use of Brazilian wood variants in the ageing of their whisky (a practice learnt from “golden cachaça”).

### 5.5.3 Offer

#### Domestic production

Domestic production in Brazil across most spirit categories continues to grow, the premier spirit produced in Brazil is cachaça which is distilled from sugarcane juice and has been a spirit product that has been historically produced throughout most of Brazil’s history. Some regions of Brazil have received Geographical indications (GI) status for their cachaça, for example *cachaça de Minas* signifies the cachaça is from the state of Minas Gerais.

Rum production tends to be focused in the states of Bahia, Pernambuco and Alagoas; vodkas are produced across the nation with there being a notable rise in small craft distilleries of vodka in recent years. An estimated 60m litres of vodka are produced in Brazil each year. Whisky production mimics vodka also to an extent in that it is produced across the country and has a notable rise in of craft distilleries in recent years. Production of whisky is estimated to be around the 20m litre mark. There is considerable grape spirit production, with just under 50m litres estimated to be produced each year. Gin production is low (estimated at just over 10m litres).

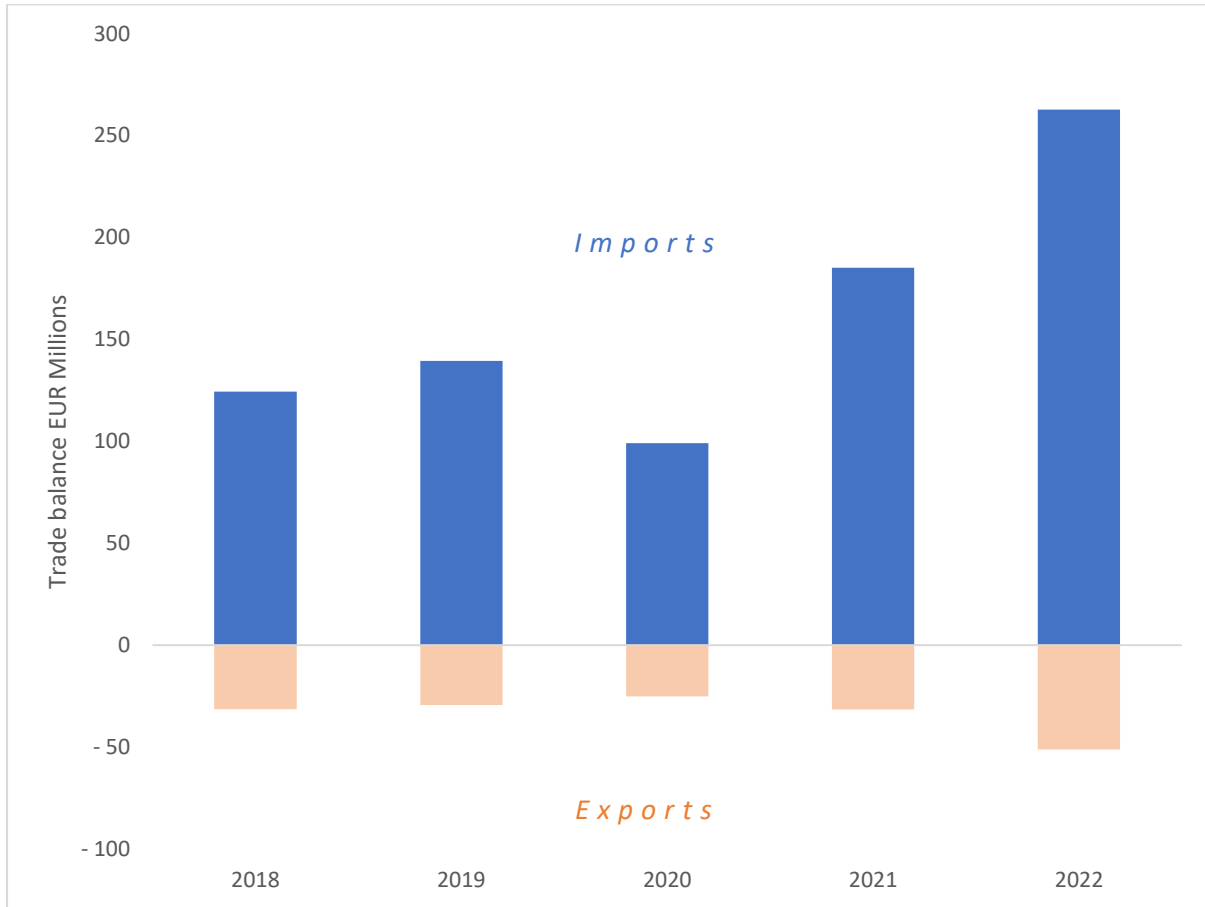
The largest companies currently operating in the Brazilian spirit market include Cia Muller de Bebidas Ltda and Diageo Brasil Ltda (each with around a 15% share of the market) and Industrias Reunidas de Bebidas Tatuinho (10%); the rest of the market is made up of a mixture of domestic and international products competition within a fragmented market. There is a growing craft spirits industry in Brazil. This historically has been focused on cachaça. However, craft distillers have been leveraging their experience in distilling Cachaça to produce other spirits as well, most notably gin and whisky; and often with unique flavours.

#### Imports and exports

As shown below in Figure 5-20, Brazil is a net importer of spirits with the country importing a total of EUR 262 million worth of spirits in 2022. This compares to a value of EUR 124 million in 2018 which shows a doubling of total exports within a five year period. Total exports in 2022 came to a value of EUR 51 million in 2022.



**Figure 5-20: Trade balance (imports and exports) of spirits in Brazil, 2018-2022; EUR millions**

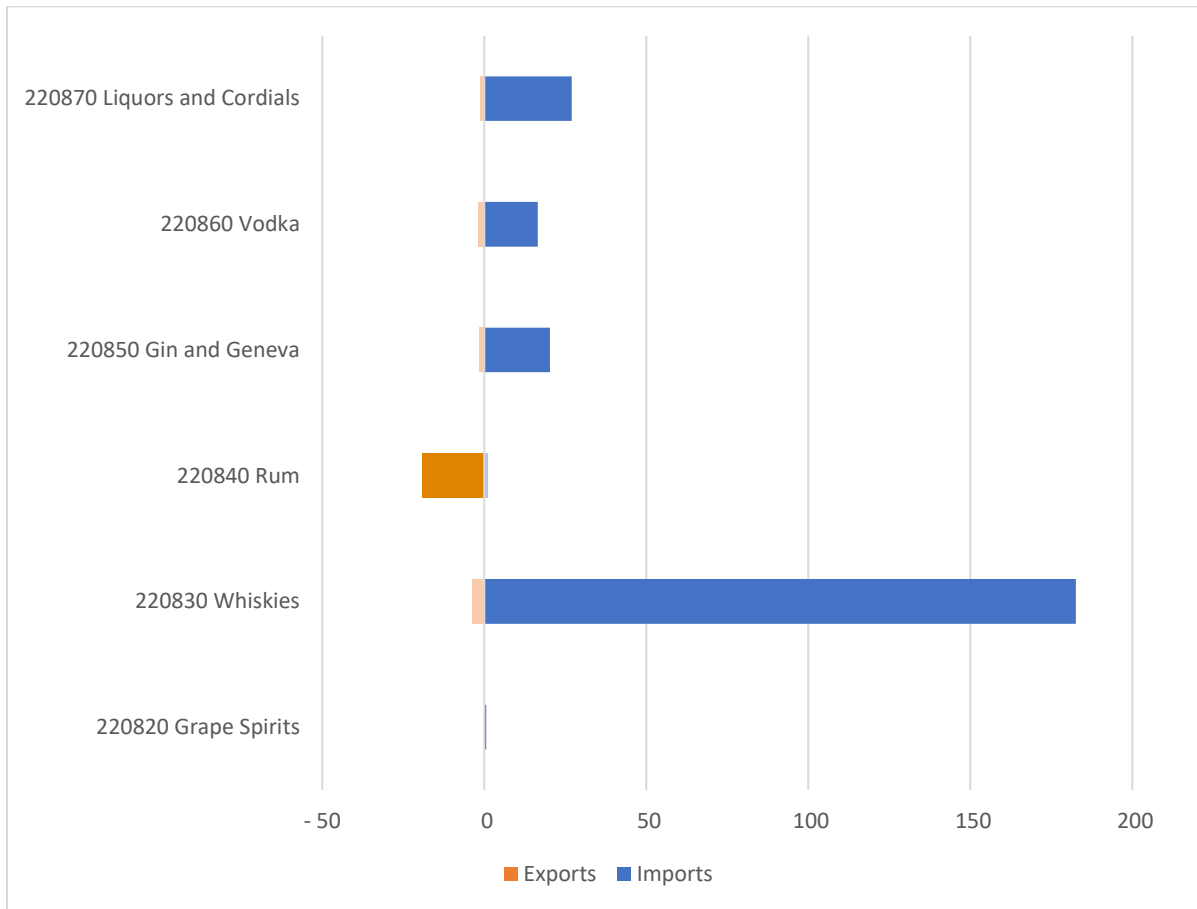


Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 2208.

As shown below in Figure 5-21, whiskies are the largest imported spirit product into Brazil with the country importing around EUR 182 million worth of whisky products in 2022, this represents around just over two-thirds of total spirit imports. Liqueurs and cordials are the second most imported product coming to a value of EUR 26 million, followed by gin and geneva to a value of EUR 20 million and vodka to a value of EUR 16 million. Rum and grape spirits are minimally imported into Brazil, with the country itself being a net exporter of rum.

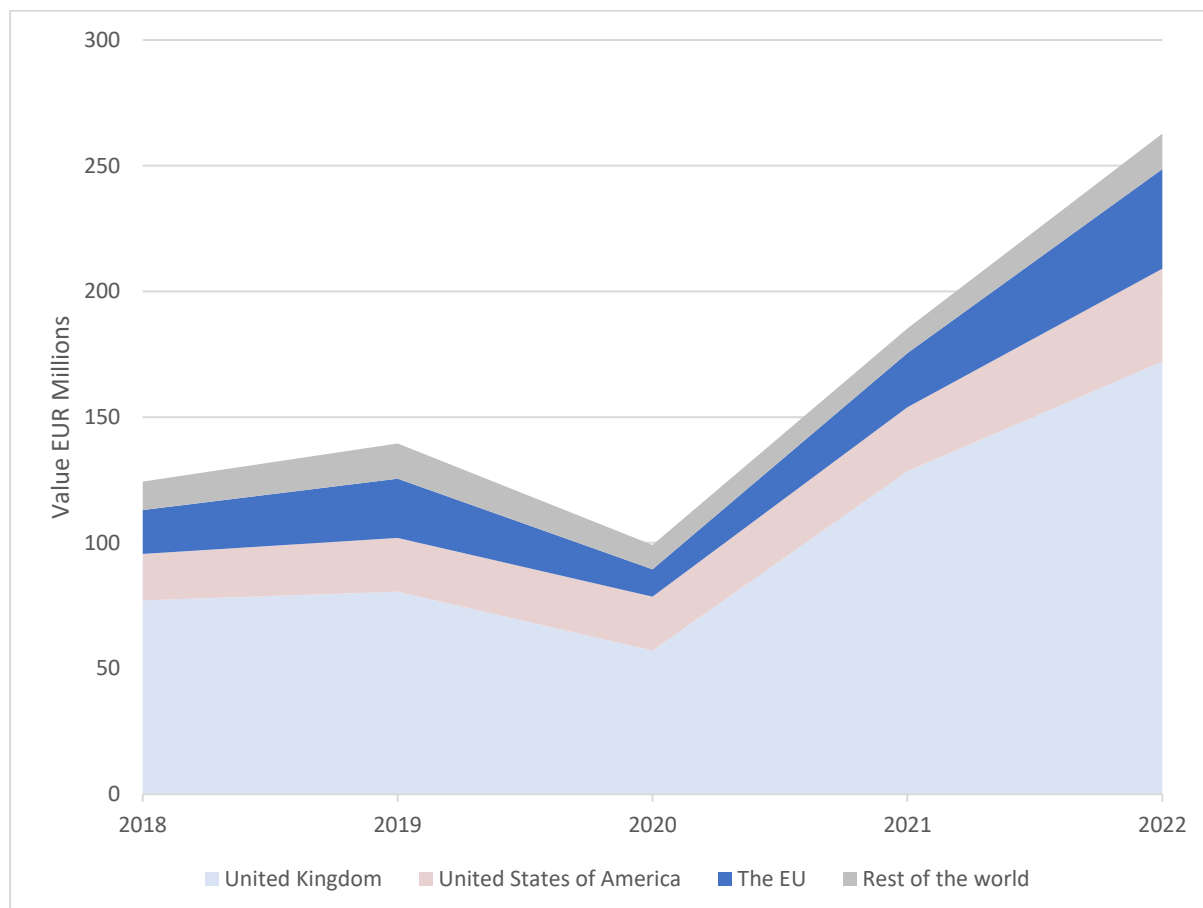
**Figure 5-21: Trade balance (imports and exports) of spirits in Brazil, by type, 2022; EUR millions**



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

CN codes before spirit name.

As Figure 5-22 outlines, the UK is the largest exporter of spirits to Brazil with a total export trade value of EUR 172 million which accounts for around 54% of total imports by Brazil in 2022. This is followed by the USA which exported a total value of EUR 36 million (around 12% of total exports). The EU recorded a total export value of EUR 39 million (around 12.5% of total exports) with France, Spain and Sweden being the three largest exporters of spirits to Brazil.

**Figure 5-22: Brazilian imports of spirits by country, 2018-2022; EUR millions**

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 2208

### EU GI products

As noted in section 4.2.4, there is a register of protected GIs. Cognac is among the products on the list at the time of writing.

### Main competitors

The main competition in the spirits sector comes from domestic spirit producers which tend to focus on the production of cachaça, vodka, whiskey and liquors. Domestic production of vodka, whiskey and liquors is picking as demand for these products also increases in the market, a craft distillery of these products are emerging in the market which continue to pose competition for EU producers. The biggest competitors in the imported spirits market are the UK (which is considerably the largest exporter of spirits to Brazil, almost all due to whisky) and the US which offer competition across most major spirit product categories.

## 5.5.4 Specific market entry requirements

### Market Access and Entry

The customs procedures for importing foodstuffs are set out in section 4.2.1. A full list of the general documentary requirements for export set out in Table 4-1, along with requirements by

product category in Table 4-2. Requirements for spirits notably include: registration of importer of beverages; certificate of origin for beverages, fermented acids, wine, products derived from grape wine; an import inspection certificate for beverages; and a certificate of maturation. Other requirements may also apply.

In terms of tariffs, spirits generally face ad valorem tariffs of 16%, though in some cases the tariffs are lower (9.6%).

**Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:**

***Main page – select product, country of origin and destination country:***

<https://trade.ec.europa.eu/access-to-markets/en/home>

***Example link – general spirits category (2208) from France to Brazil***

<https://trade.ec.europa.eu/access-to-markets/en/search?product=2208&origin=FR&destination=BR>

### Standards, SPS measures

There are various pieces of legislation which regulate the standards for alcoholic beverages, including spirits. Details on these can be found at the following link:

<https://www.gov.br/agricultura/pt-br/assuntos/inspecao/produtos-vegetal/legislacao-de-produtos-origem-vegetal/bebidas>

### Labelling

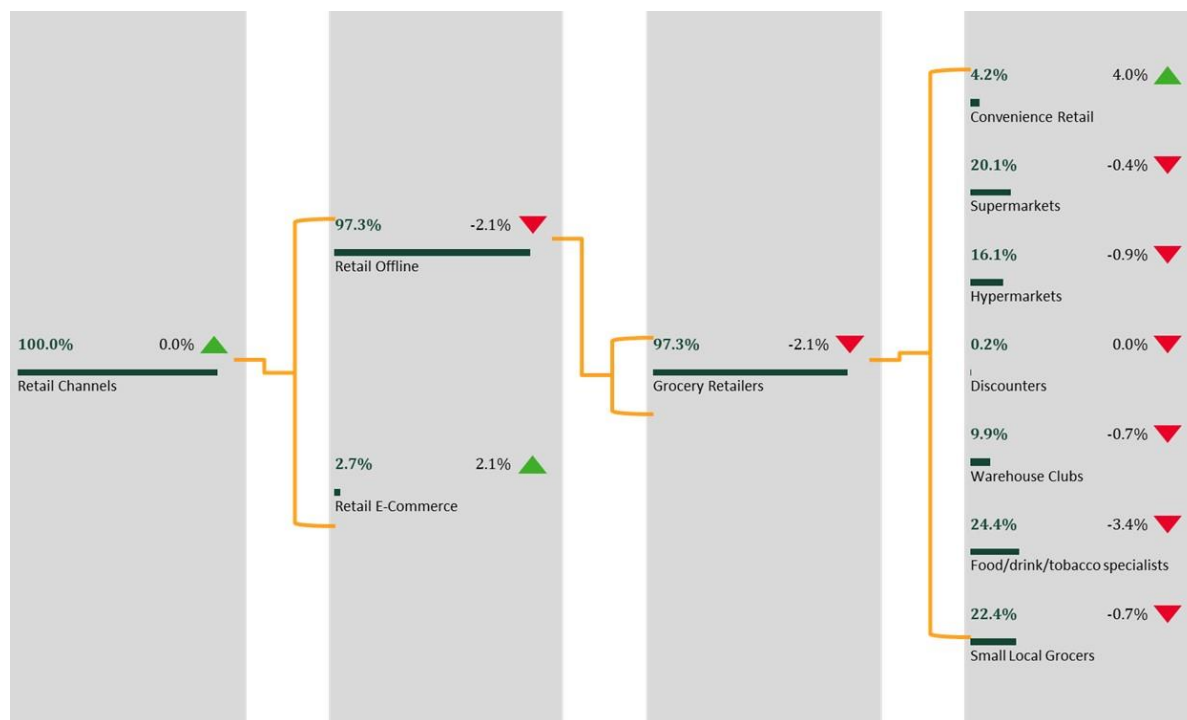
Spirits must conform to the labelling requirements for packaged foods set out in section 4.2.3. This notably includes:

- Percentage of alcohol content
- The warning: “Avoid excessive consumption of alcohol”.

### 5.5.5 Distribution

By volume, the on-trade sector accounts for the majority of spirits sales in Brazil which is reflective of the wider bar and nightlife culture of the country. Within the off-trade sector which accounts for a volume of 36% of sales, grocery retailers dominate. The largest distribution channels are food/drink and tobacco specialist stores which account for 24.4% of total sales, this is followed by small local grocers which account for 22.4% of sales, supermarkets which account for around 20.1% of sales and warehouse clubs which account for 9.9% of sales. Retail e-commerce remains small with a share of 2.7% however it is growing in importance, particularly for imported spirits.

Figure 5-23: Distribution channel overview of spirits in Brazil (2022); off-trade volume



Source: Euromonitor International: Alcoholic Drinks, 2023.

### 5.5.6 Challenges for EU products

The main problem for EU spirits entering the Brazilian market is the imposition of tariffs on these products which are currently set at 16%. These tariffs make EU spirits less price competitive in the Brazilian market and alienate a large segment of the lower-middle- and lower-income classes. The local preference in Brazil remains for cachaça which holds a strong market position, convincing consumers to choose EU spirits over cachaça may prove to be a challenge.

Distribution in Brazil further provides challenges as the country is vast and tends to have regional preferences for spirit consumption; for example, Brazilian states located in the north of the country along the Caribbean are known to have higher consumption rates of rum compared to the rest of Brazil, conversely, whisky and vodka is more commonly consumed in the south of Brazil and within larger urban centres. Developing relationships with local distributors is key towards navigating the Brazilian market. Final challenges that should be considered include internal taxation which slightly favours domestic spirits (cachaça), though as seen above the consumer of this product tends to be different from that of imported spirits; currency fluctuations which may impact trade; counterfeiting concerns which is a concern in the Brazilian market to an extent (with bottle-refilling and cargo theft the most common forms of this, and online marketplaces increasingly used for their distribution); and the competitive landscape of the market with even domestic producers who have operating advantages over EU producers facing an extremely competitive market.



### Market Takeaway: Spirits

**Consumption:** Spirits are the second most commonly consumed alcoholic beverage in Brazil, with cachaça being the most popular spirit consumed in the country. Vodkas and whiskies have grown in importance and now represent the largest non-sugarcane distilled spirits in Brazil. Consumers of EU imported spirit are very likely to be upper-middle- or higher-income earners who tend to live within the larger urban areas of Brazil.

**Competition:** The popularity of domestically produced sugarcane distilled spirits coupled with rising production of whisky, vodka, rum and other major spirit products in Brazil is increasingly providing competition. British (in particular) and American exports are also providing major competition for EU producers operating in the Brazilian market.

**Distribution:** For most imported and even domestic spirits, on-trade is the key market with on-trade channels accounting for 64% of total domestic distribution. Off-trade retailers of note include supermarkets, food/drink and tobacco specialist, small local grocers and hypermarkets. Retail e-commerce remains a small channel of distribution but is projected to grow in importance.

**Challenges:** Competing with popular sugarcane distilled spirits coupled with being faced with a 16% tariff on spirits entering Brazil stand out as the two major challenges for EU producers, other notable challenges include competing with British and American spirits in the market, counterfeiting, currency fluctuations and the logistical challenges of operation in a market as large as Brazil.

**Opportunities:** Targeting and sponsoring on-trade establishments, particularly during major festivals and celebrations in Brazil offers an opportunity to gain a foothold in the market. While sugarcane distilled spirits remain popular in Brazil, other spirits are catching up, particularly vodka and whisky, while domestic production of these categories has also picked up, premium variants of these and most major spirit products are still associated with being imported from abroad.

## 5.6 Olive oil

### 5.6.1 SWOT analysis

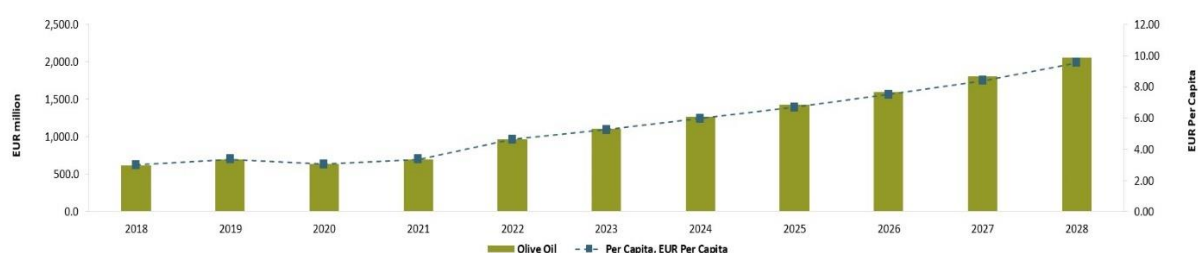
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> <li>The <b>EU</b> accounts for the <b>majority of olive oil imports</b> into Brazil, with Portugal alone accounting for a value share of 56%.</li> <li>Brazil now stands as the <b>largest importer of olive oil products in Latin America</b>.</li> </ul>	<ul style="list-style-type: none"> <li>A <b>tariff rate of 8%</b> remains for EU olive oils exported to Brazil.</li> <li>The presence of <b>cheaper alternative cooking oils</b> such as corn and soya bean oils in a generally price-sensitive market.</li> </ul>
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> <li>The <b>market</b> for olive oil is expected to <b>double in retail value</b> between 2024 and 2028.</li> <li>A <b>potential EU-Mercosur FTA</b> in the short term could see EU olive oil products become more price competitive in the Brazilian market.</li> <li>At one end of the market there is a <b>growing premiumisation trend</b>. At the other end of the market, <b>blended products</b> are attracting <b>new consumers</b>.</li> </ul>	<ul style="list-style-type: none"> <li><b>Growing domestic production base</b> within Brazil; both in terms of quantity and of quality.</li> <li><b>Argentina and Chile</b> stand as the largest non-EU exporters of olive oil to Brazil.</li> </ul>

### 5.6.2 Consumption

#### Evolution of consumption

The consumption of olive oil as shown in Figure 5-24 has been on an upward trajectory and is forecasted to grow rapidly between 2024 and 2028 with the market expected to double in value to a market size of around EUR 2 billion, double the current market size of just under EUR 1 billion.

**Figure 5-24: Evolution and forecast of the retail market for olive oil (value, EUR millions) and olive oil consumption per expenditure, in Brazil; 2018-2028**



Source: Euromonitor International: Packaged Food, 2023.

Note: figures for 2024 to 2028 based on forecasts.

## Consumers

Olive oil consumption is growing rapidly in Brazil, and the country is now the largest importer of olive oil in Latin America. Brazilian consumers of olive oil tend to fall into three major sub-categories at present; these categories are.

- **Health-conscious consumers.** A significant proportion of the Brazilian consumer base is increasingly health-conscious, which has been a trend observed over the past decade and further exacerbated by the outbreak of Covid-19. Olive oil is often perceived to be the healthier option to alternative cooking oils in Brazil and is considered healthy for the heart.
- **Gourmet and culinary enthusiasts.** Olive oil is valued for its distinct flavours and aromas, which encourages its usage amongst gourmet and culinary enthusiast consumers. This consumer group includes those who further enjoy dining and consuming foods of Mediterranean and Middle Eastern origin, which often incorporate the usage of olive oil products. There is also a sizable community of ethnic Portuguese consumers who further tend to appreciate olive oil products.
- **Higher income earners.** Olive oil, particularly premium varieties, is often associated with being a luxury food item in Brazil, which means that consumers in higher socioeconomic groups stand out as the main consumer group for these products - the average Brazilian consumer is unlikely to consider olive oil as an essential food item. Most higher-income earners tend to live in the larger urban centres of Brazil; are more likely to have completed higher education; and many will have travelled to and consumed olive oil from the EU.
- **Families with children.** There is a notably higher level of olive oil consumption among families with children compared to those without children. This consumption is highest among families with middle-aged household heads. Indeed, in terms of age as a whole (regardless of family status), consumption is highest in the lower middle age segment of 34 to 49; though there is also a younger, predominantly single demographic which are attracted to the product for reasons of cooking..
- **Southern based.** Olive oil is particularly popular in the south, where an estimated 2/3 of the population consume the product. In the northeast and southeast, around 1/3 of the population are estimated to consume olive oil

Olive oil consumption across the wider Brazilian consumer base is picking up, as evident by the market being projected to double in size within the next four years. This points to middle- and lower-income earners becoming increasingly curious and appreciative of the flavour and health qualities of olive oil products.

## Drivers and method of consumption

The consumption of olive oil in Brazil, as discussed, is growing rapidly, and there are several key drivers behind this trend.

- **Health Awareness.** A major driver for the consumption of olive oil is the increasing awareness of the health benefits associated with olive oil products, with producers advertising these qualities on a more consistent basis within the Brazilian market. Olive oil is considered healthier compared to other traditional olive oils (such as soybean oil or corn oil), which aids in its perception among health-conscious consumers.
- **Retail Availability.** The availability of olive oils in various retail outlets, particularly supermarkets, hypermarkets, and specialty stores, has risen substantially in recent years, which has helped to advertise olive oil products to a wider segment of the Brazilian consumer base. Olive oil, which would have been considered largely a niche product a decade ago, is now a regular fixture alongside other major cooking oils in

Brazil, although it does remain more costly and hence limited. Private label offerings have also helped with increased retail availability at attractive pricing points.

- **Influence of cooking shows and social media.** Cooking television shows remain very popular in Brazil and often utilize international food and beverages, with olive oil being increasingly showcased on these television shows. Social media further advertises olive oil products to a wider amount of the Brazilian consumer base. As many Brazilian consumers use social media to research tips regarding a healthy and balanced diet, many influencers advocate for the consumption of olive oil due to its health qualities via these platforms. Indeed, home cooking overall has helped boost interest in olive oil.

One of the more common methods of consumption of olive oil products in Brazil is as a dressing on salads (around half of olive oil purchasers using the product primarily for this purpose). Increasingly, Brazilian consumers are incorporating olive oil with citrus juice as a dressing for simple green salads or more elaborate fruit and vegetable products. Cooking is next in popularity, and the use of olive oil as a dipping sauce for bread is also increasingly common. The popularity of television shows from Portugal, which will often showcase olive oil as a dipping sauce, coupled with increasing interest in Mediterranean foods, further makes this a common method of consumption. Brazilian consumers enjoy barbecues (*churrasco*), particularly during the warmer months. Increasingly, olive oil is often used as a component of marinating meats. Other common methods of consumption include cooking or sautéing, drizzling over pasta or pizza, and seasoning foods in general. While the foodservice channel for olive oil may be considered large in absolute terms due to Brazil's large market, in relative terms it is fairly small, accounting for an estimated 6m litres or less than 10% of the total olive oil market.

### Purchase criteria

The purchasing criteria for olive oil in Brazil can vary among consumers, reflecting a combination of personal preferences, health considerations, and desires for certain qualities in olive oil products. Some of the more common purchasing criteria include:

- **Price point.** The price of olive oil remains the most significant consideration for consumers outside of the higher income earner bracket; indeed, overall just over half of olive oil consumers have reported that price is a key deciding factor, with BRL 20 (EUR 3.70) for a 250ml bottle the most common target. While some consumers are willing to invest in premium, high-quality olive oils (which will almost all be imported), many others will prioritize more budget-friendly options.
- **Quality, certification and reputation.** Qualities and certifications such as “extra virgin” and quality seals are important for consumers seeking assurance of the olive oil's authenticity and adherence to quality standards. Some consumers pay attention to the origin of olive oil products, which certain countries perceive to have unique and desirable characteristics. For example, olive oil products of EU origin are perceived to be luxury premium products and Portugal a particularly popular origin. Low acidity in Brazil is also commonly considered a proxy for quality, which results in consumers often being attracted to oils with claims of low acidity.
- **Packaging** also plays a role in consumer decisions; some consumers, for example, will prefer dark glass bottles due to the perception that dark glass bottles equate to a higher-quality olive oil product (around ¾ of olive oil in Brazil is sold in glass bottles, and these are predominantly dark). Packaging that includes information about the olive oil's origin, production methods, and taste may also prove to be attractive to consumers.
- **Brand.** Brand does play an important role for some consumers (with Gallo and Andorinha the most popular brands, sharing just over 40% of the market; and a number



of brands of different origins with low single digit market shares). Nonetheless, in view of the price criterion above, there is a willingness of some consumers to purchase private label products.

Other purchasing criteria of note include sustainability and ethnic practices, consumer reviews and recommendations, promotional offers and discounts, and the brand reputation of a producer for more knowledgeable consumers.

### Olive oil on retailers' shelves in Brazil

Approximate retail price ranges for olive oil in Brazil are:

- Economy: around BRL 35 (EUR 6.45) per 500ml
- Mid-range: around BRL 55 (EUR 10) per 500ml
- Premium: BRL 70-100 (EUR 12.90 to 18.50) per 500ml
- Super-premium: BRL 170 (EUR 31) per 500ml



*Above and below: olive oil selections tend to be extensive, as witnessed by just part of the selection at two very different retailers in two different parts of the country (above: a supermarket in the north-east; below: a gourmet store in Sao Paulo).*





The vast majority of olive oil on sale – generally around 90% - is imported; and as a result, products can be found across the different price segments. Olive oil products are generally arranged by price, with more expensive premium products towards the top and cheaper products on lower shelves.

While 500ml is the most common format, pack sizes from 250ml to 1l are all common (with smaller 125ml packs available in a few cases). Glass bottles are far and away the most common packaging format. Premium brands increasingly use distinctive designs and/or print labels straight on to the bottles to avoid the use of stickers and maintain a premium image.

*Below: examples of some of the distinctive designs on olive oil packaging, used to communicate a premium image.*





Images © Euromonitor International / Agra CEAS, 2024.

### Recent market trends

The following market trends for olive oil have been identified in recent years in Brazil:

- Price competitiveness remains influenced by externalities.** Despite olive oil production within Brazil growing in recent years, the majority of olive oil sold in the country is imported from abroad. This means that the price of olive oil is subject to externalities outside of the control of Brazilian retailers. As a result, sudden price spikes have occurred, particularly in 2023, as the war in Ukraine and a reduced harvest in Europe resulted in olive oil in Brazil spiking in price by up to 37%<sup>63</sup>. Soybean and corn oil

<sup>63</sup> Le prix de l'huile d'olive grimpe de 37% au Brésil en 2023, Tridge, available at <https://www.tridge.com/fr/news/olive-oil-price-soars-37-in-brazil-in-2023>

remain cheaper in Brazil, although overall consumption of olive oil continues to grow rapidly in the country.

- **Domestic production is growing.** Brazil has been expanding its olive oil production capacities in recent years, particularly in the states of Rio Grande do Sul, Santa Catarina, and Minas Gerais. While the country has nowhere near the same scale of production as Spain or Italy, growing demand is making it more attractive for producers to set up olive oil production facilities with the aim of targeting a market that is expected to double in value between 2024 and 2028.
- **Olive oil mixes used to appeal to consumers without high incomes.** In order to appeal to mid and lower-income consumers in particular, “blended” oil - typically featuring a blend of olive and soy oil in ratios of 5-30% - is becoming increasingly available through some players; in particular in areas of the country away from major urban centres.
- **Premiumisation.** In a growing market, some consumers are looking for premium and artisanal varieties of olive oil, with established players launching products targeting the more premium market.
- **Globalisation and the influence of media continue to impact the market.** The rise of international foodservice outlets in Brazil, such as Mediterranean or Middle Eastern-themed restaurants, is compounding total demand for olive oil products in Brazil. Consumers in Brazil, particularly younger consumers, are increasingly seeking out what they perceive to be international products, of which olive oil would be generally classified. This is further influenced by media outlets such as social media influencers or cooking TV shows, which now commonly showcase the health and flavouring qualities of multiple olive oil products and brands.

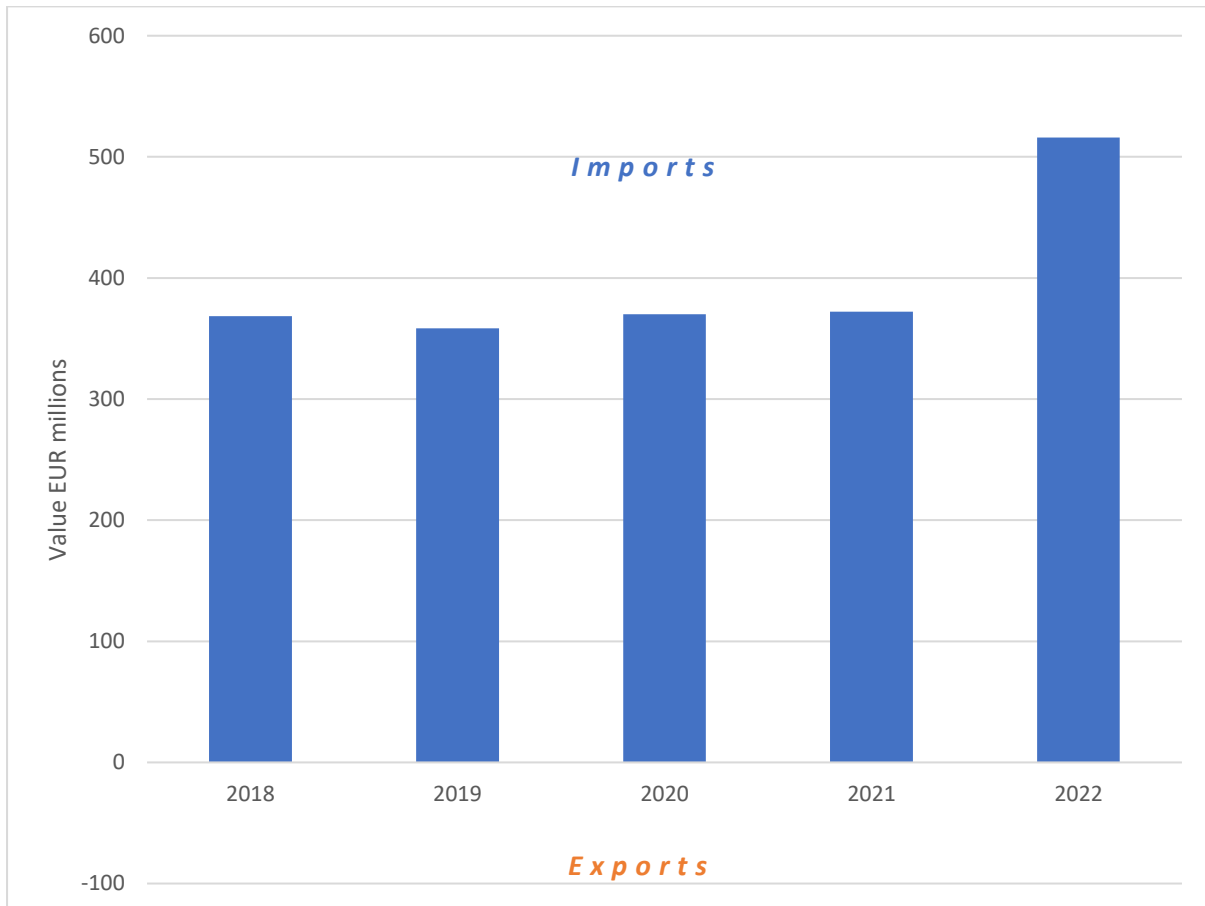
### 5.6.3 Offer

#### Domestic production

As mentioned, Brazil does not historically have a particularly large olive oil production base; however, there has been a notable rise in domestic production in recent years, centred primarily within the states of Rio Grande do Sul, Santa Catarina, and Minas Gerais. 2022/23 campaign production was estimated at around 580 000 litres. Brazilian olive oil producers primarily focus currently on the production of extra virgin olive oil products, which are considered to be the highest quality olive oil product and the one that offers generally the most economic attractiveness for producers in Brazil (over 80% of 2022/23 production was extra virgin). The most predominant varieties for oil are Koroneiki, Arbequina, Arbosana, Frantoio, Picual and Coratina. Overall when considering both imports and domestic production, the largest companies that currently have a market share of the Brazilian olive oil market include Gallo (just under 30% share of the market), Andorinha (13% share of the market), and Borges (5% share of the market). The rest of the market is largely made up of smaller producers operating within a growingly competitive market.

#### Imports and exports

As can be seen in Figure 5-25, Brazil is a major net importer of olive oil, which is reflective of the product's growing popularity and the continued lack of any major production sector within the country. Brazil imported around EUR 515 million worth of olive oil products in 2022, which represents a rise of around 30% from the EUR 370 million figure recorded in 2020. Total exports remain minimal.

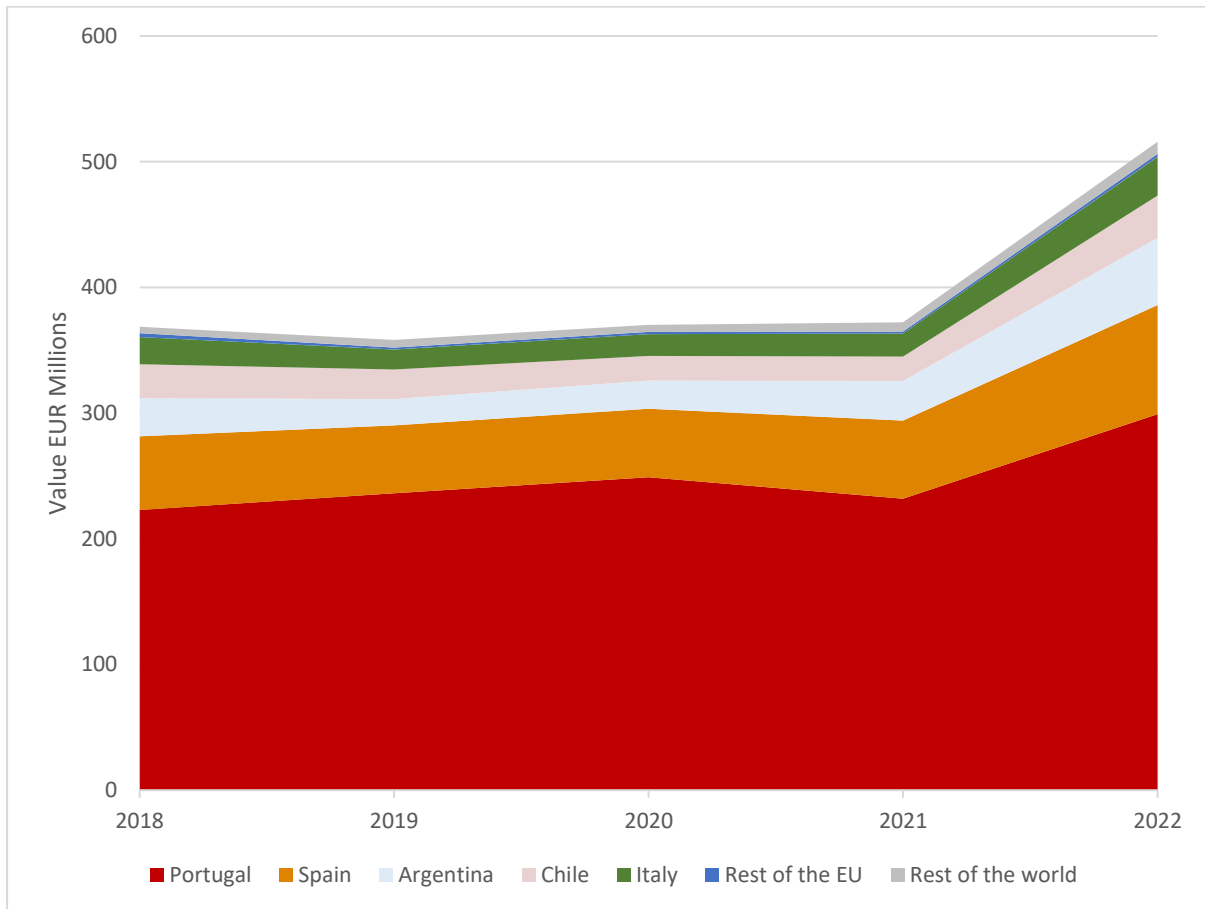
**Figure 5-25: Trade balance (imports and exports) of olive oil in Brazil, 2018-2022; EUR millions**

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 1509.

The EU accounts for the majority of olive oil exports to Brazil, as shown in Figure 5-26, with Portugal alone accounting for 56% of total exports, which equates to a value of EUR 299 million. This is followed by Spain, which accounts for 16% of total exports to a value of EUR 86 million, and Italy, which accounts for 6% of total exports. The two major competitors in this sector are Argentina, which accounted for 10% of total exports to a value of EUR 53 million, and Chile, which accounted for 6% of exports to a value of EUR 33 million.

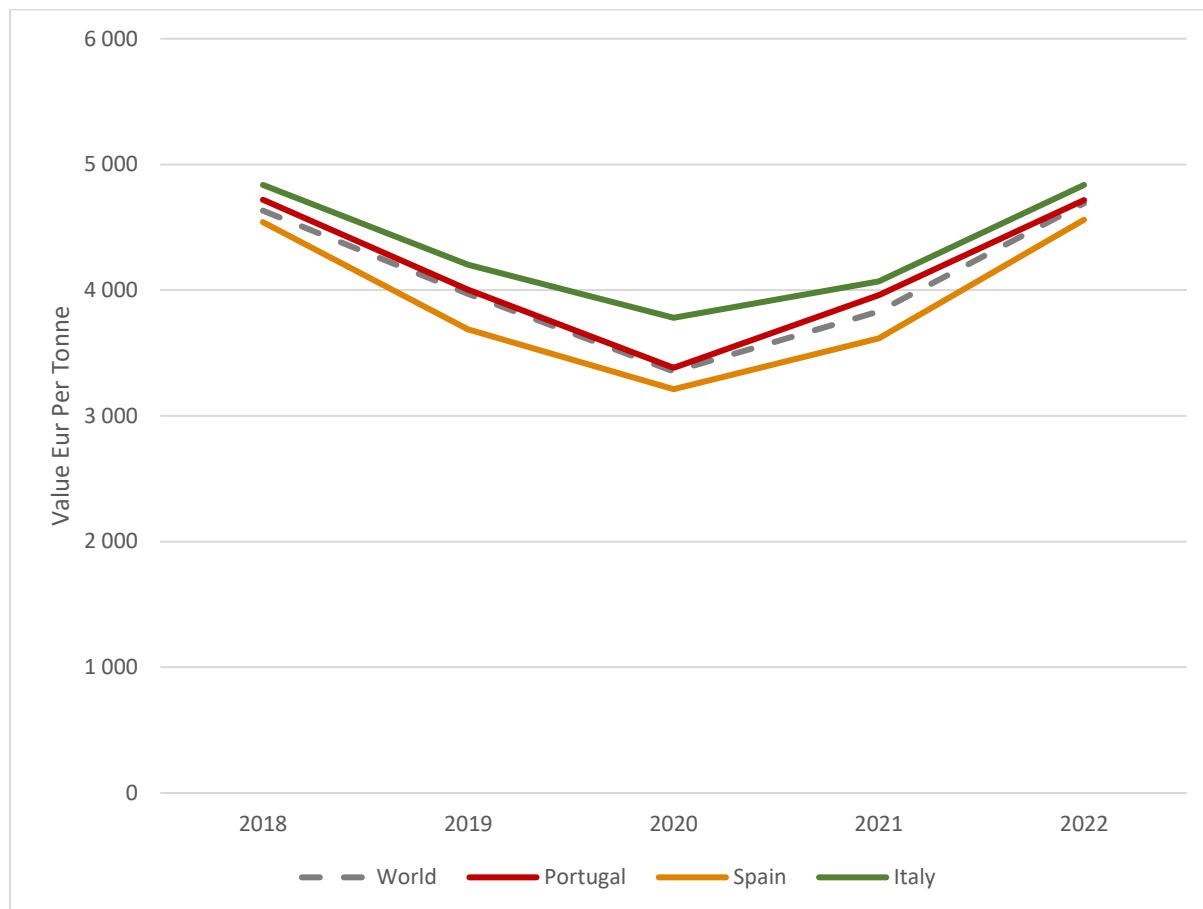
**Figure 5-26: Brazilian imports of olive oil by country, 2018-2022; EUR millions**



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 1509.

The global average unit price for olive oil products being sent to Brazil came to a figure of EUR 4 690, as shown in Figure 5-27. The unit value of Portuguese olive oil is slightly above the global average, with Portuguese olive oils having a unit price of EUR 4 700 per tonne. Spanish olive oils are slightly below the global average unit price, at around EUR 4 560. Italian olive oils cost more on average than the global average unit price, at around EUR 4 830 per tonne.

**Figure 5-27: Unit value of Brazilian imports of olive oil by country, 2018-2022; EUR per tonne**

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 1509.

### EU GI products

As noted in section 4.2.4, there is a register of protected GIs. No EU GIs for olive oil were identified on this list at the time of writing.

### Main competitors

There are three competitors of note within the Brazilian olive oil market. Firstly, domestic producers, which have set out to fully scale out their operations but continue to influence the market. The predicted rise of conventional budget olive oil production in Brazil in the short term in particular may prove to be quite challenging for EU producers. Second, Argentina and Chile stand as the remaining competitors for EU producers, as they are the only non-EU exporters of note to Brazil. Finally, there is of course the additional threat of substitution competition from other oil types.



## 5.6.4 Specific market entry requirements

### Market Access and Entry

The customs procedures for importing foodstuffs are set out in section 4.2.1. A full list of the general documentary requirements for export set out in Table 4-1, along with requirements by product category in Table 4-2. A non-automatic import licence may be required for olive oil.

In terms of tariffs, olive oil faces an ad valorem tariff of 8%.

**Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:**

**Main page – select product, country of origin and destination country:**

<https://trade.ec.europa.eu/access-to-markets/en/home>

**Example link – general olive oil category (1509) from Spain to Brazil**

<https://trade.ec.europa.eu/access-to-markets/en/search?product=1509&origin=ES&destination=BR>

### Standards, SPS measures

Key standards for olive oil include:

- [RDC 481/2021, as updated \(last in Dec 2023\)](#) on the sanitary requirements for oils and vegetable fats.
- [RDC 281/2003](#) on the import procedure for olive pomace oil

### Labelling

Olive oil must conform to the labelling requirements for packaged foods set out in section 4.2.3. Pure olive oil is theoretically exempt from the front of pack labelling requirements; however ANVISA's Resolution 481 of 2021 includes compound oil (e.g. olive oil blends / with other ingredients) in the scope.

## 5.6.5 Distribution

Figure 5-28 shows that grocery retailers are practically the only distribution channel of edible oil within the off-trade sector, accounting for 99.7% of distribution, with e-commerce currently accounting for only 0.3%, although it can be expected for this channel to grow in the short term. Supermarkets are a major distribution channel, accounting for 38.8% of total distribution, followed by hypermarkets with a share of 29% of total distribution. Small local grocers accounted for around 14.9% of sales, which represents the remaining significant distribution channel for edible oils.

Olive oil however skews slightly more towards modern retail than edible oils as a whole. An estimated 70% of olive oil passes through supermarkets and hypermarkets. Supermarkets in more remote areas of the country are more likely to stock olive oil varieties that feature blends with other popular edible oils, such as soy oil, since these products are targeted towards mid to low income consumers.

**Figure 5-28: Distribution channels overview of edible oils (including olive oil) in Brazil (2023); retail value.**



Source: Euromonitor International: Packaged Food, 2023.

### 5.6.6 Challenges for EU products

The main challenge for EU olive oil products in Brazil comes from the presence of alternative cooking oils that are often priced at a cheaper price point, such as corn oils and soyabean oils, which are also produced with a higher capacity in Brazil. A tariff rate of 8% remains for EU olive oils entering the Brazilian market, which further works to make olive oil products more expensive in Brazil. Despite efforts via marketing campaigns to raise awareness of olive oil products in Brazil, across a large segment of the consumer base, olive oil is still largely perceived as a luxury and therefore not a generally affordable product by Brazilian consumers, despite their knowledge of the health benefits olive oil provides. There have been stringent checks on olive oil in recent years, with a high level of extra virgin olive oil deemed as fraudulent by the Brazilian ministry MAPA. Finally, the emerging threat of domestic production should not be ignored. While it accounts currently for a low single digit percentage of domestic consumption, it is increasing in both quantity and quality.

### **Market Takeaway: Olive oil**

**Consumption:** Consumption is growing, and Brazil is now the largest importer of olive oil within Latin America. Consumption is primarily focused on health-conscious, higher-income (often urban) consumers and consumers considered to be culinary enthusiasts.

**Competition:** EU producers face competition from a small yet growing olive oil production base within Brazil, coupled with competition from Argentina and Chile, which are the largest non-EU exporters of olive oil to Brazil.

**Distribution:** Supermarkets and hypermarkets are the main market for olive oil, with small local grocers also being of note. On-trade establishments, such as Mediterranean or Middle Eastern restaurants, are also major outlets for olive oil.

**Challenges:** The presence of cheaper alternative cooking oils in Brazil coupled with EU producers facing a tariff rate of 8% are the larger challenges, as are the continued efforts taking place to market the health benefits of olive oil across the Brazilian consumer base. Domestic production is picking up and controls can be stringent.

**Opportunities:** The market is growing rapidly and is expected to double in retail value between 2024 and 2028, coupled with a potential EU-Mercosur FTA during this period, which could result in EU olive oil products being more price-competitive in the Brazilian market.

## 5.7 Chocolate confectionery

### 5.7.1 SWOT analysis

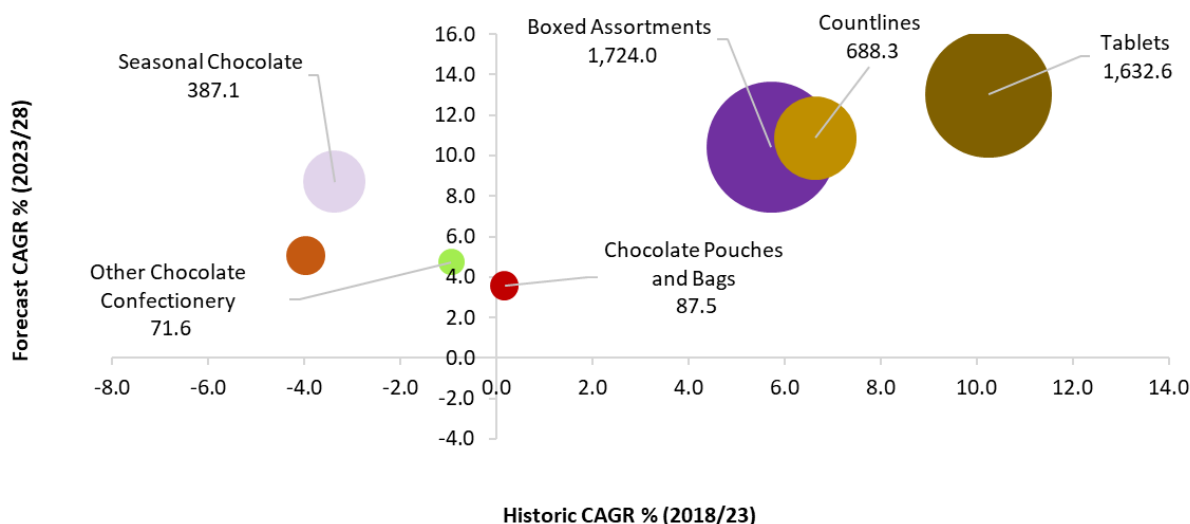
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> <li>▪ Chocolate confectioners is <b>well established</b> within the Brazilian consumer base, with the country being the 5<sup>th</sup> largest consumer in the world.</li> <li>▪ The chocolate confectionery <b>market is forecast to grow</b> at a faster pace than in previous year.</li> <li>▪ Imports seem to recover after the COVID-19 pandemic. The EU accounts for <b>over half</b> of chocolate confectionery imports by Brazil, mainly due to Germany and Italy.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Brazil became a <b>net exporter</b> of chocolate in 2023.</li> <li>▪ The <b>unit values</b> of chocolate confectionery from the main exporters of the EU to Brazil are <b>lower</b> than the world's average unit value.</li> <li>▪ <b>Seasonal chocolate, chocolate with toys, and chocolate pouches and bags</b> are the smallest categories with lower forecasted growth.</li> </ul>
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> <li>▪ <b>Boxed assortments, and tablets</b>, stand out as the largest markets. Tablets popularity is growing strongly because of their wide acceptance in the consumer base due to their variety and because they are easy to store.</li> <li>▪ <b>Premium, high quality</b> chocolate confectionery (e.g. dark chocolate), that is <b>sustainably and ethically sourced</b> is on the rise.</li> <li>▪ <b>E-commerce</b> as a channel is strongly growing and offers new opportunities to EU exporters. <b>Own brand sales outlets</b> are emerging and may offer opportunities for exporters of a sufficient size.</li> <li>▪ <b>Gifting</b> and the <b>easter egg</b> market.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Domestic production</b>, in particular the growing number of <b>artisanal producers</b> such as chocolateries, using sustainably produced and GI cocoa. Local production is cheaper than imported products.</li> <li>▪ <b>Three companies</b> account for close to <b>60% of the market</b> by value. These are Mondelez Brasil, Nestlé Brasil, and Cacau Show.</li> <li>▪ The main exporters of chocolate confectionery to Brazil are its neighbour <b>Argentina and Switzerland</b>.</li> </ul>

### 5.7.2 Consumption

#### Evolution of consumption

The chocolate confectionery market had a total value of close to EUR 3.75 billion in 2023. As shown below in Figure 5-29, boxed assortments are the largest chocolate confectionery product in Brazil by retail value with the product having a retail value of over EUR 1.72 billion in 2023. This is after a solid period of growth between 2018-2023 of 5.7% per year. The product is forecasted to grow even faster by 10.4% per year between 2023 and 2028. Tablets are the second most popular chocolate confectionery product in Brazil. With a retail value of EUR 1.63 billion, this product is forecasted to grow the strongest at a CAGR of 13.0% over the next five years. Countlines has a value of EUR 688 million and is expected to grow by a CAGR of 10.9%. Seasonal chocolate had a retail value of EUR 387 million and chocolate with toys had a total retail value of EUR 153 million in 2023. Chocolate pouches and bags are the smallest chocolate and confectionery product with a value of EUR 88 million. While seasonal chocolate, chocolate with toys, and chocolate pouches and bags all had a negative CAGR between 2018 and 2028, all categories are forecast to grow between 2023 and 2028.

**Figure 5-29: Evolution and forecast of the chocolate confectionery market in Brazil, 2018-2028; total retail value EUR million**



Source: Euromonitor International: Packaged Food, 2023.

## Consumers

Brazil is known to be the 5<sup>th</sup> largest chocolate consumer in the world.<sup>64</sup> Over 3/4<sup>th</sup> of the Brazilian population consumes chocolate and around 2/5<sup>th</sup> of the Brazilian population prefers chocolate to other foods. In total, each Brazilian consumes around 2.2 kilograms of chocolate on average per year.<sup>65</sup>

Children tend to prefer sweeter chocolate confectionery, whereas older and more health conscious consumers rather choose dark chocolate confectionery. Lower income consumers tend to prefer cheaper options like milk chocolate, while higher income consumers are more likely to opt for premium dark chocolate confectionery as it is more expensive. The same is the case for imported chocolate confectionery as it tends to be pricier than domestic brands as well.

Consumers that eat the most chocolate can be found in the southern part of Brazil. Some think this is because that area is the coldest in the country, and when winter comes, consumers tend to crave and eat more chocolate. There is higher consumption among the higher socio-economic classes, with the 30-49 age demographic the most common purchaser overall. Middle-aged and older consumers skew slightly towards tablets and boxed assortments, while younger adult consumers skew slightly towards countlines. Consumers of imported chocolate are more likely to be found in the south and south east; are likely to have higher levels of income; and in some cases may be well travelled.<sup>66</sup>

<sup>64</sup> Brazil reports rise in cocoa as imports fall in 2022 (2023). <https://www.confectionerynews.com/Article/2023/01/20/Brazil-reports-rise-in-cocoa-grinds-as-imports-fall-in-2022>

<sup>65</sup> Cocoa and chocolate in Brazil – production and consumption (2023), <https://www.aventuradobrasil.com/blog/cocoa-and-chocolate-in-brazil--production-and-consumption/>

<sup>66</sup> Chocolate Market in Brazil (2023), <https://thebrazilbusiness.com/article/chocolate-market-in-brazil#:~:text=According%20to%20ABICAB%2C%20short%20for,16%25%20and%2011%25%20respectively.>



## Drivers and method of consumption

How people enjoy chocolate has shifted in Brazil over the years. Chocolate confectionery is not just seen as a basic treat anymore; but more as a luxurious, self-indulgent delight and a symbol of indulgence. This change is connected to the growth of brands in the industry. Chocolate confectionery has evolved from being a simple supermarket snack to a high-end gift, available in a variety of flavours, ranging from dark to sweet, and crafted in both traditional and sophisticated ways.<sup>67</sup>

However, in recent years, because of rising prices and inflation, some consumers in Brazil could not afford the more expensive imported and premium chocolates. As a result, they have started enjoying local chocolates more, which are cheaper. Now that the economy is getting better, some Brazilians are starting to go back to premium chocolates. However, the demand for local artisanal chocolate confectionery persists as well.

Brazilians are also very focused on environmental, social, and governance (ESG) matters in various industries, like cocoa production. Businesses care about it because it affects how well they do, and society wants changes in the chocolate confectionery and cocoa industry to improve the situation. Consumers often ask for products of better quality that are made with more sustainable practices, aligning with their values.<sup>68</sup>

The demand for chocolate tablets has been and continues to be on the rise. This is driven by the industry's ability to adapt to changing demands. Due to the large variety of options, the demand for chocolate tablets is high even during seasonal celebrations.

Brazilians enjoy eating chocolate throughout the year, but it is particularly popular during holidays like Easter, Christmas, and Valentine's Day. During these festive times, chocolate consumption sees a significant rise, increasing by between 10-20%. Easter in particular is a notable event, with chocolate eggs popular; both domestic and imported egg products available; and a recent trend towards artisanal chocolate easter eggs. . Notably, besides occasions when chocolate is exchanged as gifts, nearly 90% of consumers also buy chocolate for their personal enjoyment. The gifting segment offers good prospects to imported chocolate as Brazilians will often look for well-known premium, often imported products for this purpose.<sup>69</sup>

## Purchase criteria

Price plays an important role, with some consumers demonstrating price sensitivity and a preference for affordable options and promotions. Promotions play a role in influencing consumer choices. While imported chocolate confectionery are sometimes deemed tastier, their higher costs, associated with packaging, storage, and distribution, make them less accessible to the general population. Brazilians tend to consume more local chocolate due to its affordability.

The type of chocolate also plays a crucial role, with chocolate tablets being the most popular format by volume, followed by boxed assortments and seasonal chocolate. Taste preferences are an important criterion as well. For example, there is a preference for plain milk chocolate

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<sup>67</sup> How Do Brazilian Consumers Relate to Chocolate Brands? Validity and Reliability Evidence of the Chocolate Brands Relationship Scale (2021), <https://www.mdpi.com/2071-1050/13/10/5635>

<sup>68</sup> Euromonitor International, Passport (2023): Chocolate Confectionery in Brazil.

<sup>69</sup> Chocolate Market in Brazil (2023), <https://thebrazilbusiness.com/article/chocolate-market-in-brazil#:~:text=According%20to%20ABICAB%2C%20short%20for,16%25%20and%2011%25%20respectively.>

tablets, followed by plain white and filled varieties, and then plain dark tablets. However, dark chocolate becomes increasingly more demanded.

Quality and ingredients are significant considerations too, with consumers seeking high-quality chocolate made from premium and natural ingredients. Attractive and eye-catching packaging, as well as ethical and sustainable practices, tend to contribute to purchasing decisions as well. These criteria are particularly relevant to more premium imported products. Indeed, the perception of superior quality and, in the cases the brand is known, the brand value, can play important roles in the consumer purchase decision for this sub-category.

Some consumers also value brand reputation as they associate well-established brands with quality and trust. Others look for convenience and thus tend to shop online. Additionally, there is a growing demand for sustainable, traceable, and ethically produced chocolate that aligns with consumers' values.

#### **Chocolate on retailers' shelves in Brazil**

Approximate retail prices for chocolate in Brazil are:

- Economy: BRL 13 (EUR 2.40) per 100g
- Mid-range: BRL 25 (EUR 4.60) per 100g
- Premium: BRL 35 (EUR 6.50) per 100g
- Super premium: BRL 50 (EUR 9) per 100g



Above: part of the imported chocolate section of a supermarket, with tablets and boxed assortments displayed together.





The presence of imported products varies greatly between outlets. While it can reach in excess of 80% in gourmet supermarkets, it is more commonly around the 20-30% mark. Imported premium chocolates most commonly are separated from domestic products i.e. they have their own dedicated shelf-space / sections. The most commonly target the mid-range or premium segments; with tablets and boxed assortments the most commonly available imported products on sale.



*Above: extensive chocolate range of a higher end retailer.*

Flexible packaging is the most common type of packaging for chocolates as a whole, but boxed assortments and tablets may use other formats. The 100g pack size has gained popularity across most chocolate categories.





Above: chocolate eggs for sale in a supermarket. Products may be available long before easter, as witnessed by this photo (early February).

It should be noted that chocolate products, due to their nutritional content, typically carry front of pack nutritional declarations / warning labels for sugar and fat.

Below: nutritional warning label on the front of an imported box of chocolates (top left corner).



Images © Euromonitor International / Agra CEAS, 2024.

## Recent market trends

The Brazilian chocolate market has become larger and more competitive, which makes it important to stay up to date with market trends. Some of the more influential recent trends identified within the Brazilian chocolate market include:

- **Growing interest in premium and artisanal chocolate.** There is a noticeable shift towards premium and artisanal chocolate, driven by a focus on quality. Both Brazilian and foreign chocolate brands are witnessing increased demand for premium varieties, with over eight out of ten consumers opting for premium chocolate for their personal use.<sup>70</sup> Chocolateries, known for their top-notch offerings, have expanded significantly in major cities, offering diverse options. Major national brands are responding to this trend by introducing premium offerings. Simultaneously, the popularity of artisanal chocolate is on the rise. Artisanal products, with unique flavours that are not commonly found in supermarkets, are not only more affordable per kilogramme and also serve as an additional income source for Brazilians.
- **Sustainable, ethically produced chocolate.** This trend is driven by a heightened awareness of the importance of sustainability and social responsibility. Chocolateries are leading the way for example by offering chocolates with traceable ingredients. Marketing strategies now tend to highlight sustainable and social aspects of these chocolates, which is appealing to Brazilians who value the stories and traditions associated with the products they choose. To enhance their offerings and show a commitment to a more sustainable and socially conscious world, chocolate brands are incorporating premium, natural, and eco-friendly aspects into their products. This shift reflects the growing tendency of consumers to align their purchases with ethical and sustainable values.
- **Tablets are the most popular category by volume.** Tablets have seen growth, which enables the category to emerge as the leading format in 2023. Thus, tablets overtook boxed assortments, which might be due to the industry introducing new formats, which boosted consumer demand. The wide acceptance of the tablet format is noteworthy, even during special occasions like Easter, where the industry traditionally produces and sells chocolate eggs. The popularity of tablets can be attributed to the broad variety available, competitive pricing throughout the year and the higher costs associated with packaging, storage, and distribution for some alternative formats. This trend underscores the preference of Brazilian consumers for the convenience, variety, and accessibility offered by chocolate tablets.
- **Importance of the e-commerce channel.** The e-commerce channel has become increasingly vital for chocolate sales in Brazil. It experienced significant growth during the initial stages of the Covid-19 pandemic and continued to grow since then. It enables consumers to purchase chocolate confectionery from anywhere they want and get it delivered to their home, and thus offers increased convenience. Mondelez and Nestlé boost their digital presence for example by having brand pages on platforms like Mercado Livre. They tailor their products and promotions for different occasions and use an omnichannel strategy to make their chocolates available through various online channels. This approach has helped them gain a larger market share in the digital realm, reaching a broad audience.
- **Emergence of free-from products.** Some larger domestic brands are now offering lactose-free and gluten-free products with a “better for you” positioning. These trends

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<sup>70</sup> Cocoa and chocolate in Brazil – production and consumption (2023), <https://www.aventuradobrasil.com/blog/cocoa-and-chocolate-in-brazil--production-and-consumption/>

are increasingly driving the perception of chocolate as a permissible indulgence. Dark chocolate is also jumping on this “better for you” positioning to an extent.

### 5.7.3 Offer

#### Domestic production

Cocoa holds an important position in Brazilian agriculture, but its production has faced significant challenges over the years. In the early 1980s, Brazil was a major producer, yielding around 430 000 tonnes of cocoa beans. Today, this figure has dropped to less than 200 000 tonnes annually. The decline started in the late 1980s due to falling prices and the widespread impact of witches’ broom disease, a fungal infection that led the cocoa industry into a crisis. Consequently, Brazil slipped from being the world’s second-largest cocoa producer in the early 1980s to seventh place. Despite these challenges, chocolate production in Brazil, the world’s fifth-largest consumer market, increased by over 10% in the first half of 2022 compared to the same period the previous year. Furthermore, there has been a rise in planting of ecologically restorative cocoa tree forests, and this is expected to boost Brazilian cocoa production back towards 400 000 tonnes per year by the end of the decade.<sup>71</sup>

The landscape of small businesses and chocolatiers in Brazil has witnessed a notable surge in recent years. The increase in the number of small businesses dedicated to crafting chocolate confectionery is attributed to the low entry barriers prevalent in the industry, where sophisticated machinery is not required. This entrepreneurial wave has been further propelled by the widespread use of social media networks and e-commerce, providing these businesses with enhanced visibility and accessibility. Additionally, payment systems like PIX, no-cost instant bank transfers, WhatsApp, and PayPal have facilitated the expansion of artisanal chocolate. Chocolateries, renowned for their commitment to producing top-quality chocolate, have experienced significant growth across major cities in Brazil. While cocoa remains the key ingredient, the possibilities for combinations have elevated chocolate confectionery to new heights. It should also be noted that there are four domestic geographical indications for cocoa in Brazil: cocoa beans produced in 52 municipalities of the state of Rondônia (northern Brazil); cocoa from the south of Bahia (in northeast Brazil); cocoa from Linhares, Espírito Santo (in southeast Brazil); and an indication of origin from Tomé-Açu, in Pará (in northern Brazil). This is a reflection of resurgence of the domestic cocoa and chocolate industry, plus pride in local products.

Nevertheless, the overall chocolate confectionery market in Brazil is dominated by international companies. Mondelez Brasil Ltda ranks first with a company value share of 27%, due to brands such as Lacta Brazil, and Bis. Nestlé Brasil Ltda ranks second with a value share of 17%, due to brands such as Especialidades, and Alpino. Cacau Show, a Brazilian chocolate manufacturer based in São Paulo, ranks third with a 14% share.

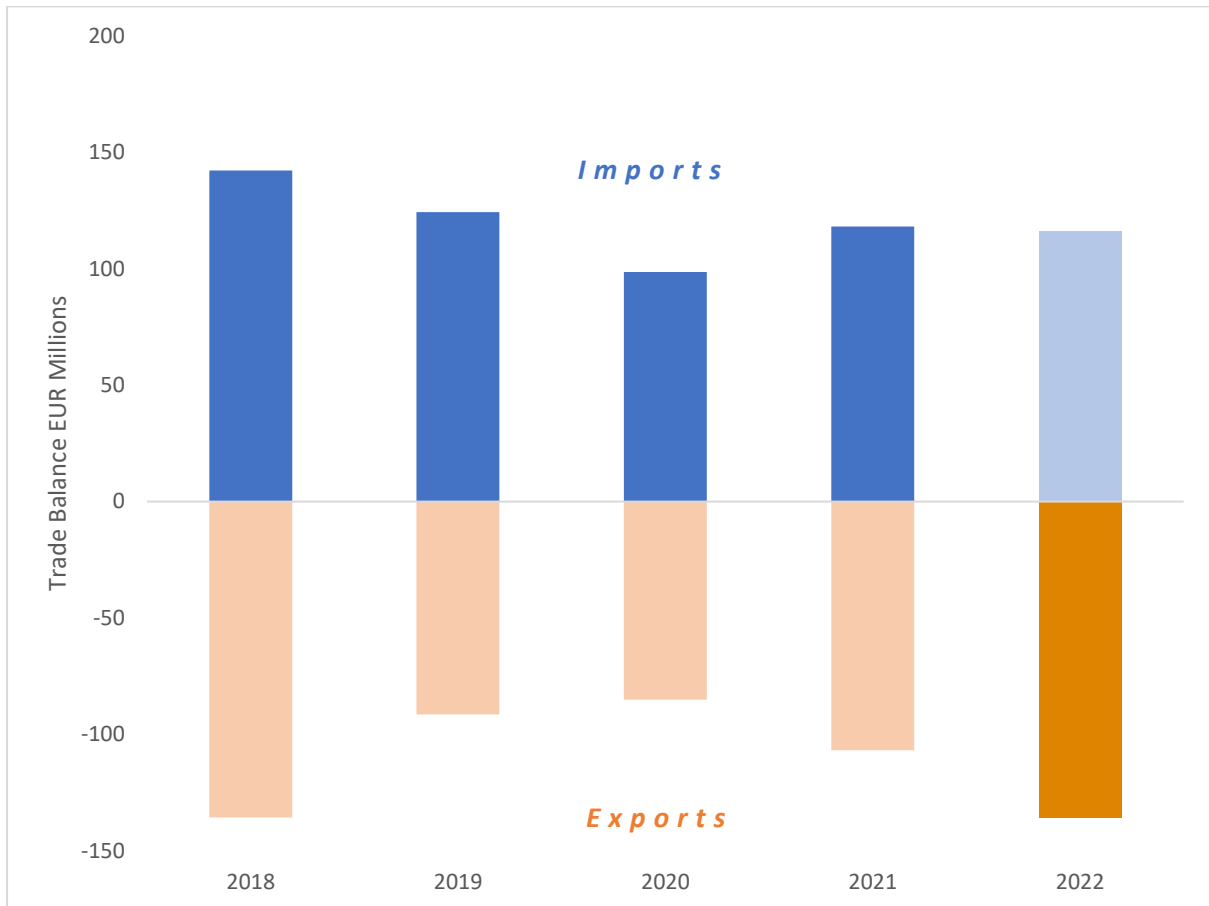
#### Imports and exports

As shown in Figure 5-30 below, Brazil is a slight net exporter of chocolate confectionery products. The country exported around EUR 136 million worth of chocolate products in 2022, whereas it imported EUR 116 million. In fact, between 2018 and 2021, Brazil was a slight net importer of chocolate confectionery, making 2022 the first recent year of it being a net exporter. The development of exports and imports and been similar throughout the years. For example, in 2018 both values were relatively high and in 2020 both values were quite low.

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<sup>71</sup> Cocoa and chocolate in Brazil – production and consumption (2023), <https://www.aventuradobrasil.com/blog/cocoa-and-chocolate-in-brazil--production-and-consumption/>

**Figure 5-30: Trade balance (imports and exports) of chocolate confectionery in Brazil, 2018-22; EUR millions**

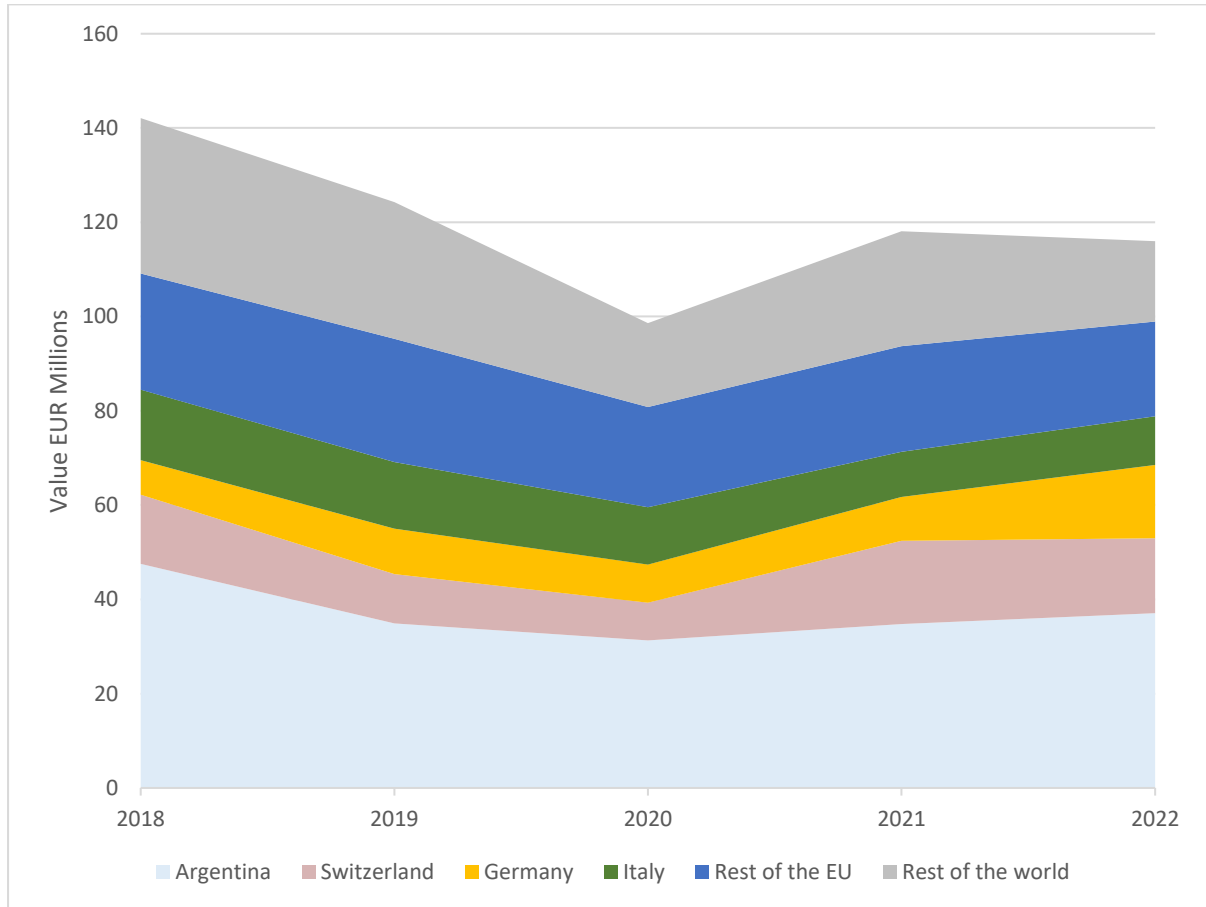


Source: Trade Map, International Trade Centre – <https://www.trademap.org/>

Data for CN code 1806.

Figure 5-31 shows, Brazil's neighbour Argentina is the largest exporter of chocolate producers by a considerable distance, with the country accounting for around 32% (EUR 37 million) of all chocolate products imported by Brazil. Switzerland ranked second with a value of close to EUR 16 million, followed by Germany with also close to EUR 16 million, and then Italy with EUR 10 million. Other EU exporters of note include Belgium, Poland, France and Austria. The EU as a whole accounted for 53% of chocolate confectionery imports by Brazil.

**Figure 5-31: Brazilian imports of chocolate confectionery by country, 2018-22; EUR millions**



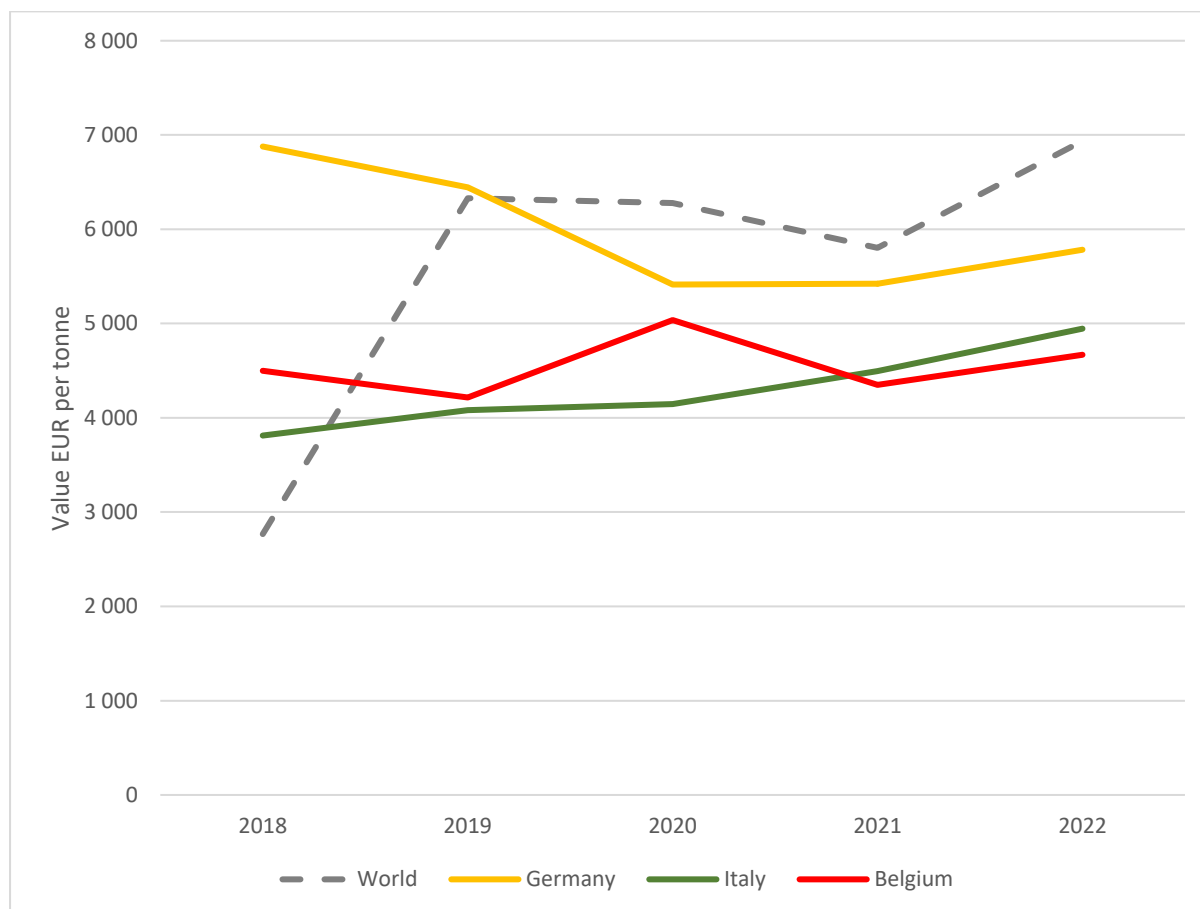
Source: Trade Map, International Trade Centre – <https://www.trademap.org/>

Data for CN code 1806.

As can be seen in Figure 5-32, the world's average unit price of chocolate confectionery is higher than that of the three main EU exports: Germany, Italy and Belgium. In 2022 it stood at EUR 6 940 per tonne, compared to EUR 5 780 per tonne for German chocolate confectionery, EUR 4 950 per tonne for Italian chocolate confectionery and EUR 4 670 per tonne for Belgian chocolate confectionery imported to Brazil. Since 2018 the world's average unit price has increased by a lot whereas the unit prices chocolate confectionery products from the three mentioned EU countries only slightly changed. Whereas the unit price for products from Germany generally decreased since 2018, the one from Italy somewhat increased, and the one from Belgium is more or less the same.



**Figure 5-32: Per unit value of Brazilian imports of chocolate confectionery for selected countries, 2018-22 (EUR per tonne)**



Source: Trade Map, International Trade Centre – <https://www.trademap.org/>

Data for CN code 1806.

### EU GI products

As noted in section 4.2.4, there is a register of protected GIs. No EU GIs for chocolate were identified on this list at the time of writing.

### Main competitors

The rise in domestic artisanal chocolate manufacturers and chocolateries in Brazil that produce high quality chocolate confectionery is a threat for higher priced imports from the EU. Domestic cocoa production is expected to rise again; and the existence of domestic GIs for cocoa is a reflection of how Brazilian cocoa and chocolate is growing in stature, at least domestically. In addition, the market is dominated by a few large companies. There are Mondelez Brasil, Nestlé Brasil, and Cacau Show. Together these three companies account for 58% of the total market. Regarding exports, Argentina and Switzerland are the main competitors for the EU.

## 5.7.4 Specific market entry requirements

### Market Access and Entry

The customs procedures for importing foodstuffs are set out in section 4.2.1. A full list of the general documentary requirements for export set out in Table 4-1, along with requirements by product category in Table 4-2. A non-automatic import licence may be required for chocolate confectionery.

In terms of tariffs, chocolate confectionery generally face ad valorem tariffs of between 14.4 and 16%.

**Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:**

**Main page – select product, country of origin and destination country:**

<https://trade.ec.europa.eu/access-to-markets/en/home>

**Example link – general chocolate confectionery category (1806) from Germany to Brazil**

<https://trade.ec.europa.eu/access-to-markets/en/search?product=1806&origin=DE&destination=BR>

### Standards, SPS measures

The key standard for chocolate confectionery is [RDC 723/2022](#) on the sanitary requirements for various confectionery products (including chocolate).

### Labelling

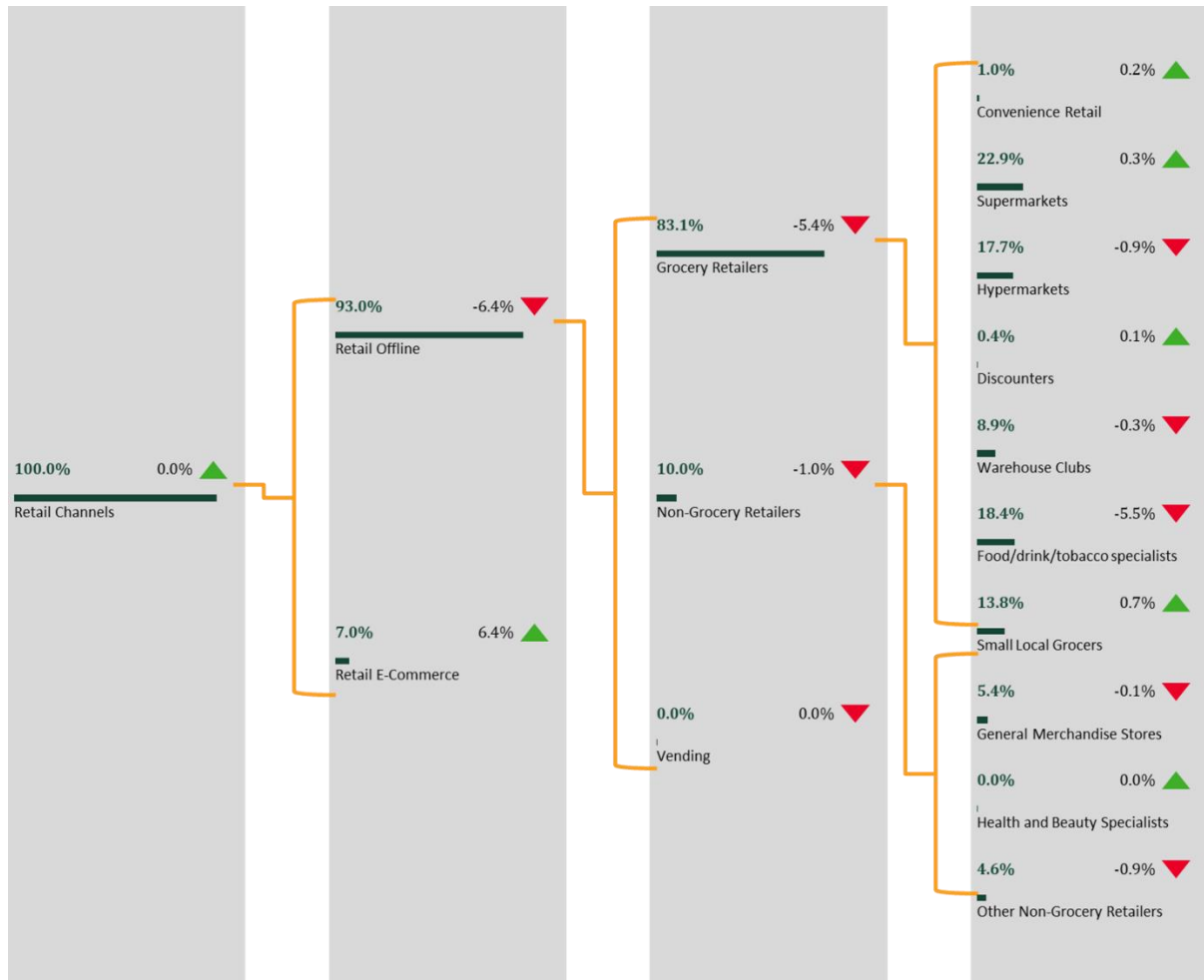
Chocolate confectionery must conform to the labelling requirements for packaged foods set out in section 4.2.3.

## 5.7.5 Distribution

Chocolate confectionery in Brazil is mainly distributed through offline retail (93%) as shown below in Figure 5-33. Grocery retailers are the main distribution channel for chocolate confectionery, accounting for 83.1% of all sales. The largest distribution channels include supermarkets with a share of 22.9%, food/drink/tobacco specialists with 18.4% and hypermarkets with 17.7%. E-commerce retail reached a share of 7.0% in 2023, which is an increase of 6.4% since 2018.

It should be noted that there has been a recent rise chocolate producers selling product through their own retail outlets / chocolateries. Frequently they offer customisable products at such outlets. While this trend has been dominated by domestic premium producers, at least one foreign producer has set up such outlets. For premium imported products without these own-brand stores, higher end supermarkets and hypermarkets – often located in high-end malls – are among the more common distribution channels.

Figure 5-33: Distribution channel overview of chocolate confectionery in Brazil (2023); retail value



Source: Euromonitor International: Packaged Food, 2023.

### 5.7.6 Challenges for EU products

EU products face several challenges in the Brazilian chocolate confectionery market, which is characterised by being a net exporter and a significant producer of chocolate-based goods. The increasing trend in local artisanal production poses a substantial challenge, as these products are often of high quality and cost-effective compared to imported premium chocolates. Indeed these local artisanal products often plug into themes which interest many consumers such as sustainable cocoa production and domestic GI cocoa usage. The market is largely dominated by three major companies, collectively holding nearly a 60% share of the total market value. To successfully navigate this competitive landscape, EU products must align with consumer demands for sustainability and ethical sourcing. Meeting these criteria has become crucial, as consumers increasingly prioritise products that resonate with their values.

#### **Market Takeaway: Chocolate confectionery**

**Consumption:** *The chocolate confectionery market had a total value of close to EUR 3.75 billion in 2023. It is forecast to grow at a good pace. Boxed assortments and tablets stand out as particularly popular.*

**Competition:** *Products from large international companies, as well as domestic artisanal production and the rise in chocolateries are the main competitors to EU chocolates in the market, with imported Argentinian and Swiss chocolate confectionery also having an impact to some degree.*

**Distribution:** *Mostly through grocery retailers such as supermarkets, food/drink/tobacco specialists, and hypermarkets. E-commerce channel growing at a fast pace.*

**Challenges:** *To compete with cheaper but equally good products, may those be locally produced or imported from other countries. To follow evolving market demands such as demand for sustainable and ethically sourced products, which domestic producers are addressing well.*

**Opportunities:** *Premium chocolate, sustainable and ethically sourced chocolate, dark chocolate growing in popularity, tablets and boxed assortments, e-commerce and own-brand outlets as a channel.*

## 5.8 Beer

### 5.8.1 SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> <li>▪ The <b>beer market</b> of Brazil is huge with a value of EUR 53 billion which represents the largest beer market in Latin America.</li> <li>▪ <b>Belgium and Germany</b> are the <b>two biggest exporters</b> of beer to Brazil.</li> <li>▪ The <b>re-opening of the economy post COVID-19</b> has allowed for the on-trade sector to begin to recover, with the bar culture of Brazil making the beer market heavily reliant on the sale of beer via the on-trade sector.</li> </ul>	<ul style="list-style-type: none"> <li>▪ The market for <b>stout and dark beers</b> is quite limited with stout being extremely niche in the market.</li> <li>▪ EU beers are currently facing a <b>tariff rate of 16%</b>, which makes EU beers additional unaffordable for the average price sensitive Brazilian consumer.</li> <li>▪ <b>Low and no alcohol beers</b> remain <b>largely associated with soft drinks</b> instead of a direct substitute to conventional beers.</li> </ul>
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> <li>▪ <b>Rising demand</b> for artisanal craft beers with unique tastes and characteristics.</li> <li>▪ The potential for an <b>EU-Mercosur FTA</b> in the short term would lead to EU beers being more price competitive in the market.</li> <li>▪ Focusing on <b>sponsoring significant cultural on sporting events in Brazil</b>, which are heavily tied to beer consumption, may open a window of opportunity to gain a foothold in the market.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Domestic producers</b> are well established in the Brazilian market, and <b>Brazil itself stands as one of the largest beer producers</b> in the world and the largest in Latin America</li> <li>▪ <b>Total imports have been declining</b> in recent years and Brazil stands now as a clear net-exporter of beer.</li> <li>▪ <b>Limited import competition</b> from the <b>US, Argentina and Uruguay</b>.</li> </ul>

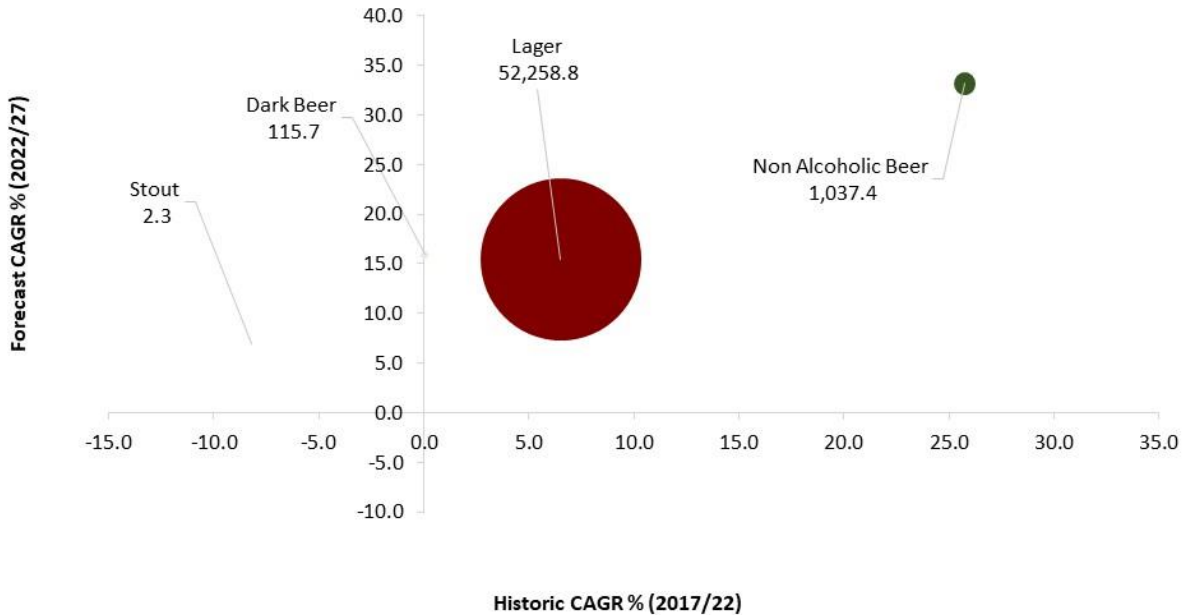
### 5.8.2 Consumption

#### Evolution of consumption

The Brazilian beer market is dominated by lager beers, which account for a total retail value of EUR 52 billion. For context, the rest of the beer market, which accounts for non-alcoholic beer, dark beer, and stouts, is valued at EUR 1.1 billion. Non-alcoholic beers are the fastest-growing beer category, with substantial growth rates anticipated for this product category. A forecasted CAGR of 33% over coming years is anticipated. This also compliments the wider growth of the Brazilian beer market that is anticipated to take place in the short term; lagers are expected to grow at a CAGR of 15.4% until 2027 (very substantial considering the current EUR 52 billion market value), and dark beers are expected to grow by a CAGR of 15.9%. Stouts will remain a largely niche beer product in the Brazilian market, with a forecasted CAGR of 6.9% expected between 2024 and 2027, although the total market remains small at a current retail value of just EUR 2.3 million (Figure 5-33).



Figure 5-34: Beer market in Brazil (value, EUR million); 2017-2027



Source: Euromonitor International: Alcoholic Drinks, 2023.

## Consumers

Beer consumption in Brazil is quite common, as beer is the premier alcoholic beverage consumed in Brazil. Therefore, beer consumers can cover various groups across the general population. Beer is a popular choice for social gatherings, parties, and casual get-togethers. Some of the key consumer groups of note include:

- **Young adults and millennials:** This consumer group is a significant one, as this demographic is often drawn to the social aspects of beer consumption, such as nightlife, festivals, and sporting events. Craft beers and innovative flavours are particularly appealing to this consumer group, reflecting a growing interest in beer as a nuanced and diverse beverage.
- **Urban professionals:** Urban professionals are another important consumer group. This group may prefer premium and in some cases imported beer brands, often seeking a more sophisticated and high-quality drinking experience. Craft and specialty beers also attract urban professionals, who tend to appreciate unique and artisanal products.
- **Sports Enthusiasts:** Beer is closely associated with sporting events in Brazil, and with Brazilians particularly being huge fans of football, this creates a consumer base for beer. Beer consumption at stadiums and bars during major sporting events such as the FIFA World Cup or Copa America results in notable spikes in the total volume of beer sales in Brazil.

- **Low-Middle income consumers:** Beer is relatively affordable in Brazil, making it accessible to a broad range of consumers with varying income levels and hence the alcoholic beverage of overall preference. Popular domestic brands tend to cater to this demographic quite heavily, offering cost-effective options for those looking for an affordable alcoholic beverage.
- **Tourists:** Brazil is a major tourism hub in South America, and tourists often associate certain events in Brazil (such as the Rio de Janeiro Carnival) with the consumption of alcohol, such as beer (which is also true for locals as well). Tourism in 2019, prior to the outbreak of COVID-19, was estimated to be around 6.3 million visitors.

### Drivers and method of consumption

There are several key drivers to consider in the Brazilian market for beer, with the biggest drivers being:

- **Cultural significance:** Beer holds cultural significance in Brazil and is deeply embedded in social traditions. Brazilians commonly consume beer to celebrate festivals, enjoy outdoor activities, or watch sports. The cultural emphasis on socializing and communal gatherings contributes significantly to beer consumption.
- **Warm climate:** Brazil has a predominantly warm climate, which encourages the consumption of refreshing beverages, with beer often being the drink of choice. The cold and crisp nature of beer makes it particularly appealing to consumers living in the tropical regions of Brazil. The warm climate combined with the beaches, culture, and topography of Brazil further encourages tourism, which acts as another key driver of beer consumption in Brazil.
- **Sports culture:** Brazil has a passionate sporting culture, particularly for football. Football matches and major tournaments create massive demand for beer consumption in Brazil; and when the national football team performs well in major tournaments there is a notable spike in the total volume of beers which are sold in the market.
- **Economic accessibility:** Beer is relatively affordable in Brazil, making it accessible to a broad spectrum of the population. The competitive pricing of domestic and international beer brands allows consumers from various income levels to enjoy beers on a regular basis.

Beer is frequently consumed at social gatherings, parties, and celebrations, and the country further has a bar and pub culture that encourages the consumption of beer in the country. Outdoor cultural events such as carnivals or music festivals also typically incorporate the consumption of beer. Many Brazilians also enjoy consuming beer at home, and the country has a strong BBQ culture (*churrasco*), which further encourages the consumption of beer. Beer is commonly sold in cans or bottles in a similar fashion to that found in the EU. Typical beers in Brazil are packed in either 600-ml glass bottles or 355-ml aluminium cans. There is an increasing desire for craft beer products in Brazil, which often have unique and niche packaging that often includes either a glass with the insignia of the producer or some other memorabilia or note that references the craft producer or origin of production.

## Purchase criteria

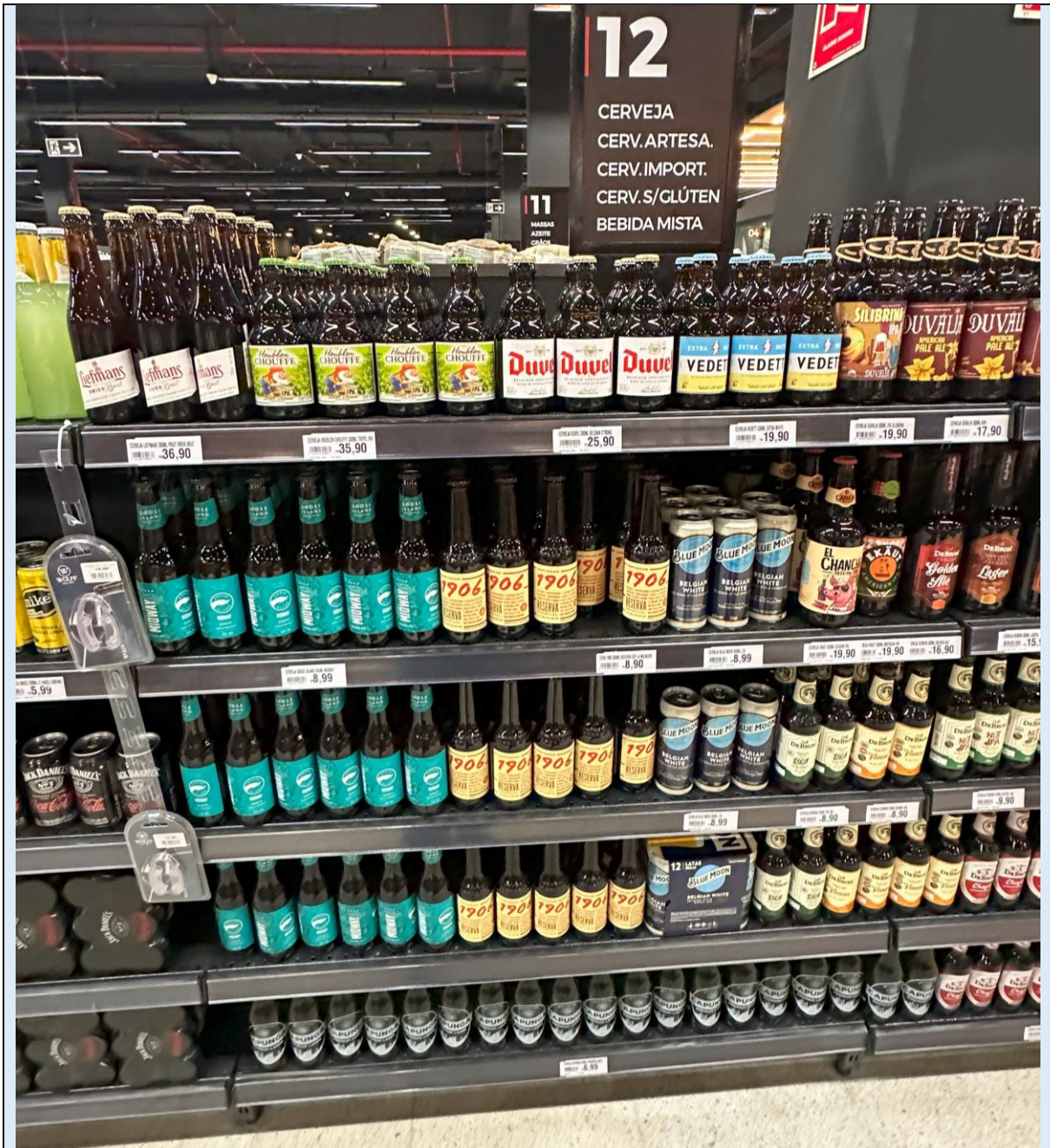
In Brazil, purchasing decisions for beer are influenced by various factors, reflecting the diverse preferences and lifestyle choices of consumers. Some of the key purchasing criteria include:

- **Brand reputation and recognition.** Brand reputation in beer purchasing decisions plays a significant role; well-established and reputable brands often have a loyal consumer base. Consumers may choose familiar brands based on their trustworthiness and perceived quality. The flavour and style of beer also play a crucial role, with Brazilian consumers having diverse taste preferences. Craft beers, which are known to be more diverse and unique in terms of flavours, have gained popularity among those seeking unique brands or flavours to choose from.
- **Price and affordability.** Price sensitivity is a key consideration for many consumers in Brazil. Affordability and value for money influence purchasing decisions, with many consumers opting for beer options that fit within their budget constraints. This is particularly important in a market where beer is considered a widely consumed and affordable beverage.
- **Alcohol content.** The alcohol content of beer can influence purchasing decisions; for example, some consumers may prefer lighter beers with a lower alcohol content for casual and extended consumption, while others may opt for stronger options. Low and no-alcoholic beers (particularly lager variants) are growing in popularity in Brazil and are expected to be a key sector of growth in the overall beer market of the country going forward as consumers in greater numbers continue to adopt a healthier lifestyle.
- **Packaging and presentation.** Packaging design and presentation can impact consumer choices; eye-catching labels, creative packaging, and innovative designs can attract the attention of consumers in retail outlets. Additionally, the convenience of packaging, such as cans for outdoor activities or bottles for more formal activities, may further influence decisions.

### Beer on retailers' shelves in Brazil

Retail prices for 330ml of beer are:

- Economy: around BRL 8
- Mid-range: around BRL 17
- Premium: around BRL 25
- Super-premium: around BRL 35



Above and below: parts of imported beer sections in different stores.





Typically the selection of imported beers in retailers is very restricted (e.g. 5-15% of products on sale), if indeed imported beer is present at all. In just a few cases do supermarkets tend to offer a wider offering. Imported beers most commonly target the premium segment and above; though a few mid-range products can be found. They tend to be placed on separate shelves from domestic beers; and then arranged by type. While beer as a whole is frequently sold chilled in Brazil, it is comparatively rare for imported beer to be sold chilled.

Glass bottles are most popular for imported products, with different sizes from 330ml to 750ml offered. In a few cases, cans and larger keg formats (up to 5 litres) are available.

*Images © Euromonitor International / Agra CEAS, 2024.*

### Recent market trends

The following different trends are notable within the beer market of Brazil:



- **Move from aluminium cans to glass bottles in the on-trade sector.** In 2022, as on-trade opportunities expanded and the COVID-19 pandemic appeared to be nearing an end, companies quickly adjusted their strategies to prioritize key channels and consumption occasions, with beer players focusing heavily on maintaining growth in foodservice channels. The anticipation of the football World Cup fuelled this shift in focus, resulting in significant changes in marketing efforts, brand positioning, and even packaging formats. There was a noticeable shift from single-use packaging options like aluminium cans to glass bottles with a returnable design. This shift not only accommodated the specific needs of the foodservice industry but also aligned with consumers' preferences for sustainability and multi-serve options during social gatherings.
- **Non-alcoholic beer continues to grow but may need to adapt.** While non-alcoholic options have grown in popularity, it is important to note that they are not a direct substitute for alcoholic beers. These beverages are frequently consumed on multiple occasions or by a small percentage of consumers attempting to reduce or eliminate their alcohol consumption. Given the small size of this consumer group, the category is likely to become saturated quickly. As a result, brands and companies operating in this space will need to identify new opportunities for growth. One strategic priority for these brands will be to position themselves as an alternative to soft drinks, thereby expanding their consumer base beyond their initial target audience. These brands can maintain their growth by appealing to a wider range of consumers and increasing per capita consumption. Pricing, competition, and legislation will all play a role in determining the future of this category and should be carefully considered. In conclusion, while non-alcoholic beer sales have increased significantly, the category's expansion will face challenges as it approaches saturation.
- **A rapidly evolving market.** The beer category has evolved significantly in recent years, particularly in a country with high consumption volumes, and is dominated by three major companies: Cia Brasileira de Bebidas, Cervejaria Petropolis SA, and Heineken do Brasil Comercial Ltda. Differentiating in this landscape may appear difficult, but craft beer brands have successfully carved out a niche by investing in targeted marketing campaigns that appeal to specific consumer segments. While these smaller brands may not prioritize volume scalability, they are motivated by a strong desire to build influential brands and generate revenue. Currently, there is a strong emphasis on appealing to identity and using segmented branding strategies that resonate with specific consumer groups and geographic locations. This strategic focus enables craft beer brands to appeal to a wider proportion of the consumer base in Brazil.

### 5.8.3 Offer

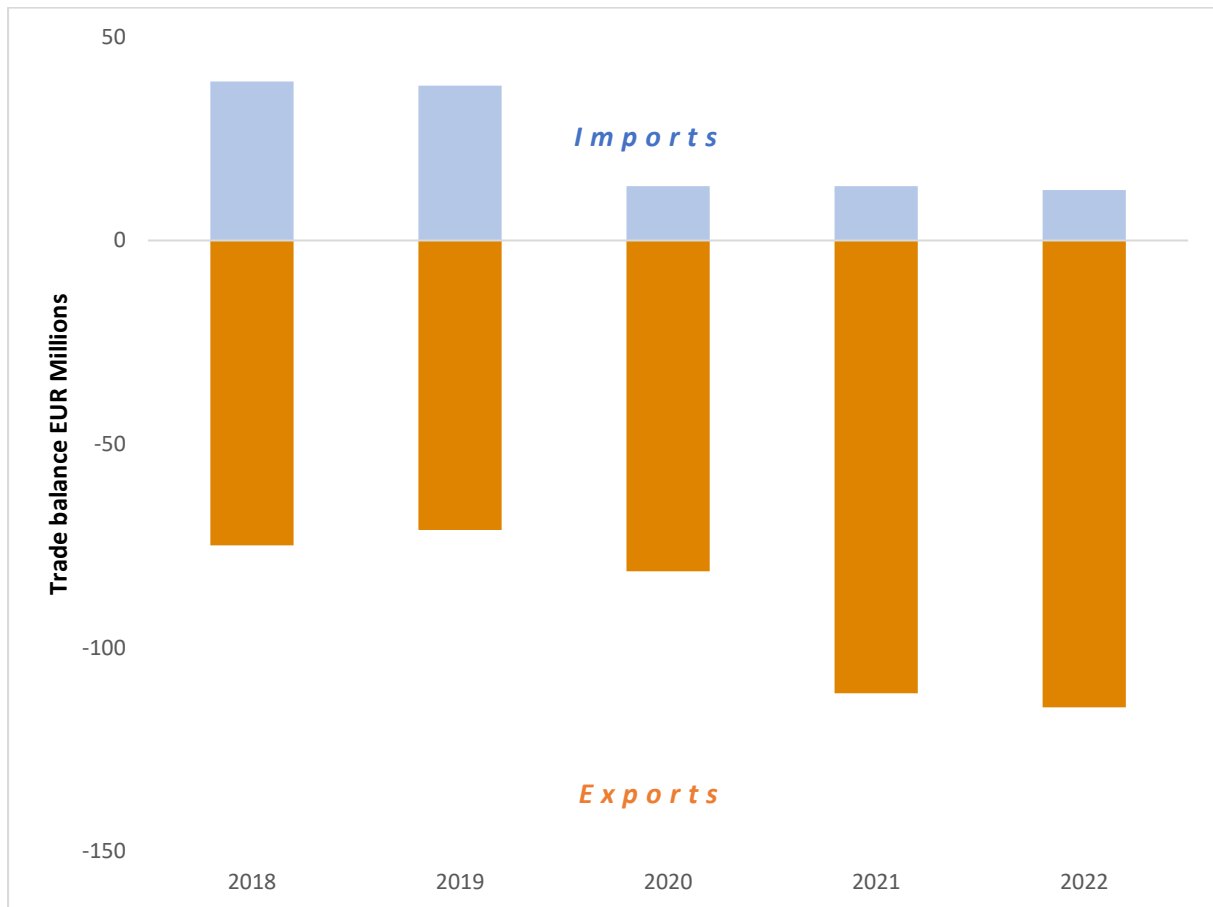
#### Domestic production

Brazil is a major global producer of beer, with the country being ranked as the third largest producer of beer, trailing only China and the USA. It is estimated that Brazil has around 1 730 breweries in operation, which work to produce around 16.1 billion litres of beer annually. Brazil is dominated by three large companies: Cia Brasileira de Bebidas (share of 62% of the market; a notable multinational and exporter; plus producer of notable brands such as Skol, a Danish beer licensed to be manufactured in Brazil and proibida), Heineken do Brasil Comercial Ltda (share of 17% of the market), and Cervejaria Petropolis SA (share of 14% of the market). The remaining 7.5% of the market is concentrated among smaller and craft beer producers. Craft beer producers have gained popularity in recent years, with several independent breweries now operating and focusing on unique and innovative beer styles.

## Imports and exports

As shown below in Figure 5-35, Brazil is a net exporter of beer, with the country exporting around EUR 114 million worth of beer products in 2022. This represents a year-on-year rise since 2018, when the figure stood at EUR 74 million. Total imports by Brazil have fallen steadily in recent years, which is influenced by the outbreak of COVID-19. Overall, imports, which were valued at EUR 39 million in 2018 and EUR 12.4 million in 2022, came to a value of EUR 12.4 million.

**Figure 5-35: Trade balance (imports and exports) of beer in Brazil, 2018-22; EUR millions**

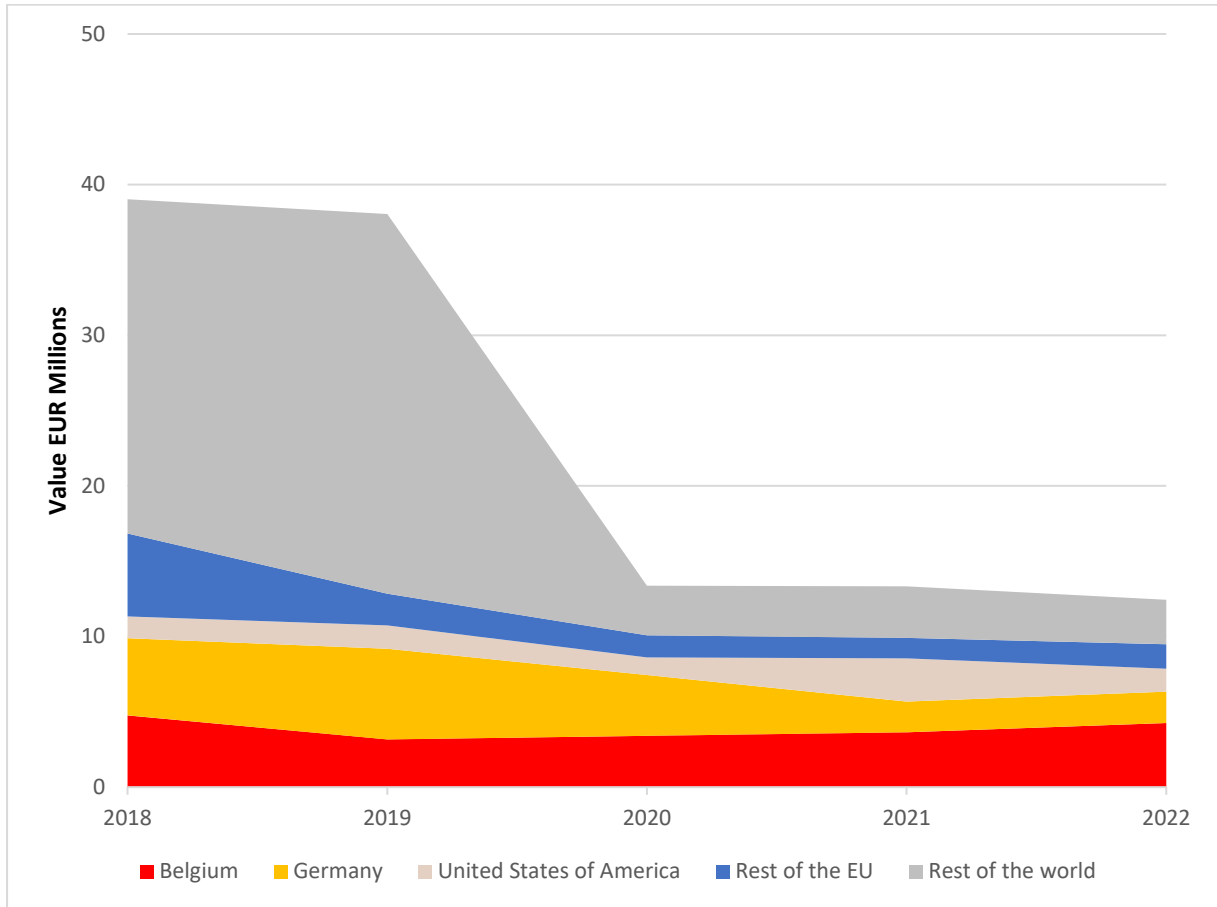


Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 2203.

Figure 5-36 further depicts the largest exporters of beer to Brazil, with Belgium being the largest exporter with a value of EUR 4.2 million, which represents around a quarter of total exports to Brazil. This is followed by Germany, which accounted for EUR 2 million worth of exports, or 12.2% of global exports, followed by the USA, which accounted for 1.5 million, or around 9% of total imports. The rest of the EU accounted for EUR 16 million worth of beer exports, which accounted for 16.5% of sales. The biggest exporters from the EU within this category include Spain, the Netherlands, and Ireland.

**Figure 5-36: Brazilian imports of beer by country, 2018-22; EUR millions**

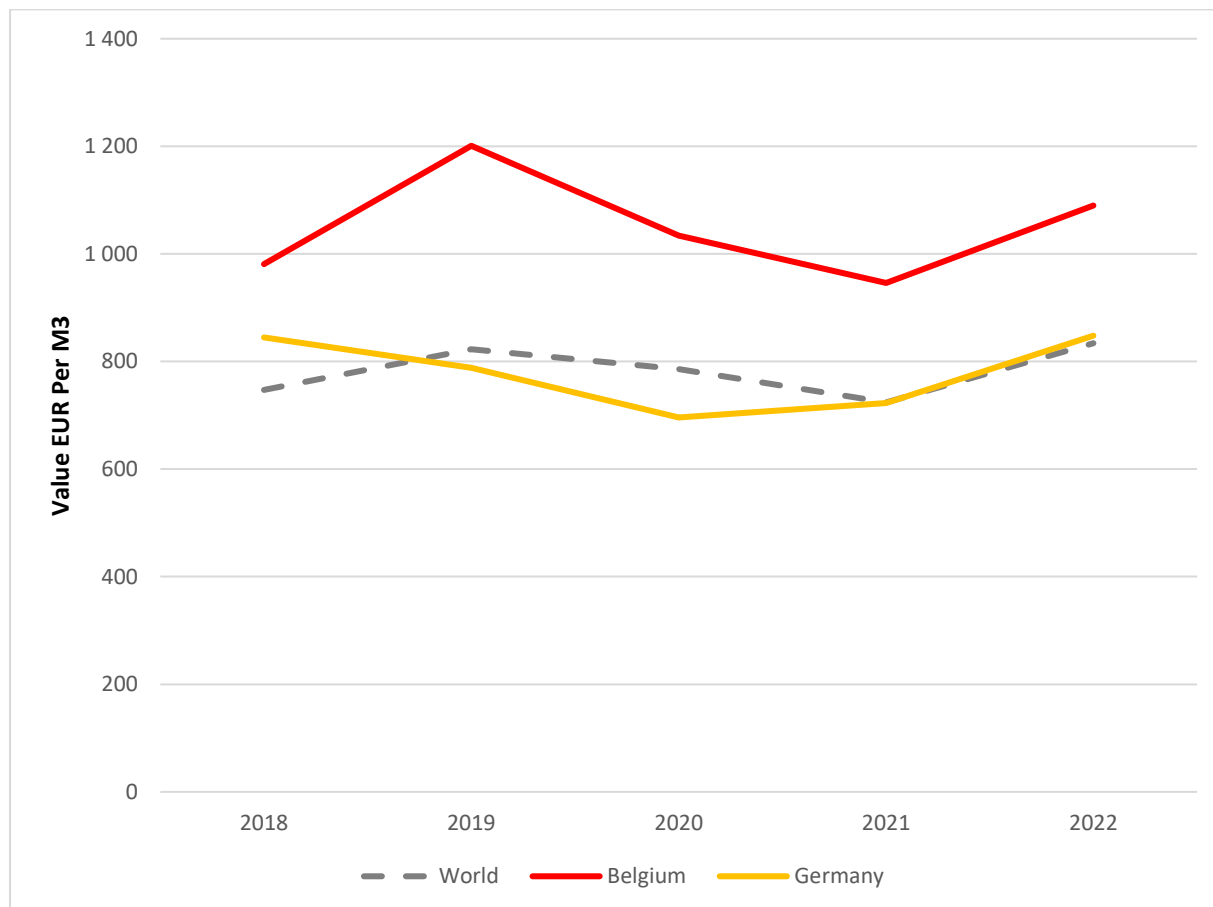


Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 2203.

Figure 5-37 goes further to explain the unit value of Brazil, with the global average of EUR 834 per m<sup>3</sup>; German beer exports are priced slightly above the global average at a value of EUR 848. Belgian beers, which represent the largest imported beers in the market, had a unit value of EUR 1 090 per m<sup>3</sup>.

**Figure 5-37: Per unit value of Brazilian imports of beer for selected EU countries, 2018-22 (EUR per m<sup>3</sup>)**



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 2203.

### EU GI products

As noted in section 4.2.4, there is a register of protected GIs. No EU GIs for beer were identified on this list at the time of writing.

### Main competitors

As mentioned, domestic breweries make up the majority of the mass market. Brazil ranks among the largest producers of beer in the world, and the country is a net exporter. There is limited competition from the USA, Uruguay, and Argentina; however, overall, it is clear that domestic Brazilian beers form the biggest competition for EU beers.

## 5.8.4 Specific market entry requirements

### Market Access and Entry

The customs procedures for importing foodstuffs are set out in section 4.2.14.2.1. A full list of the general documentary requirements for export set out in Table 4-1, along with requirements by product category in Table 4-2. Requirements for beer notably include: registration of importer of beverages; certificate of origin for beverages, fermented acids, wine, products

derived from grape wine; and an import inspection certificate for beverages. Other requirements may also apply.

In terms of tariffs, beer faces ad valorem tariffs of 16%.

**Detailed information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:**

***Main page – select product, country of origin and destination country:***

<https://trade.ec.europa.eu/access-to-markets/en/home>

***Example link – general beer category (2203) from Belgium to Brazil***

<https://trade.ec.europa.eu/access-to-markets/en/search?product=2203&origin=BE&destination=BR>

### Standards, SPS measures

There are various pieces of legislation which regulate the standards for alcoholic beverages, including beer. Details on these can be found at the following link:

<https://www.gov.br/agricultura/pt-br/assuntos/inspecao/produtos-vegetal/legislacao-de-produtos-origem-vegetal/bebidas>

### Labelling

Beer must conform to the labelling requirements for packaged foods set out in section 4.2.3. This notably includes:

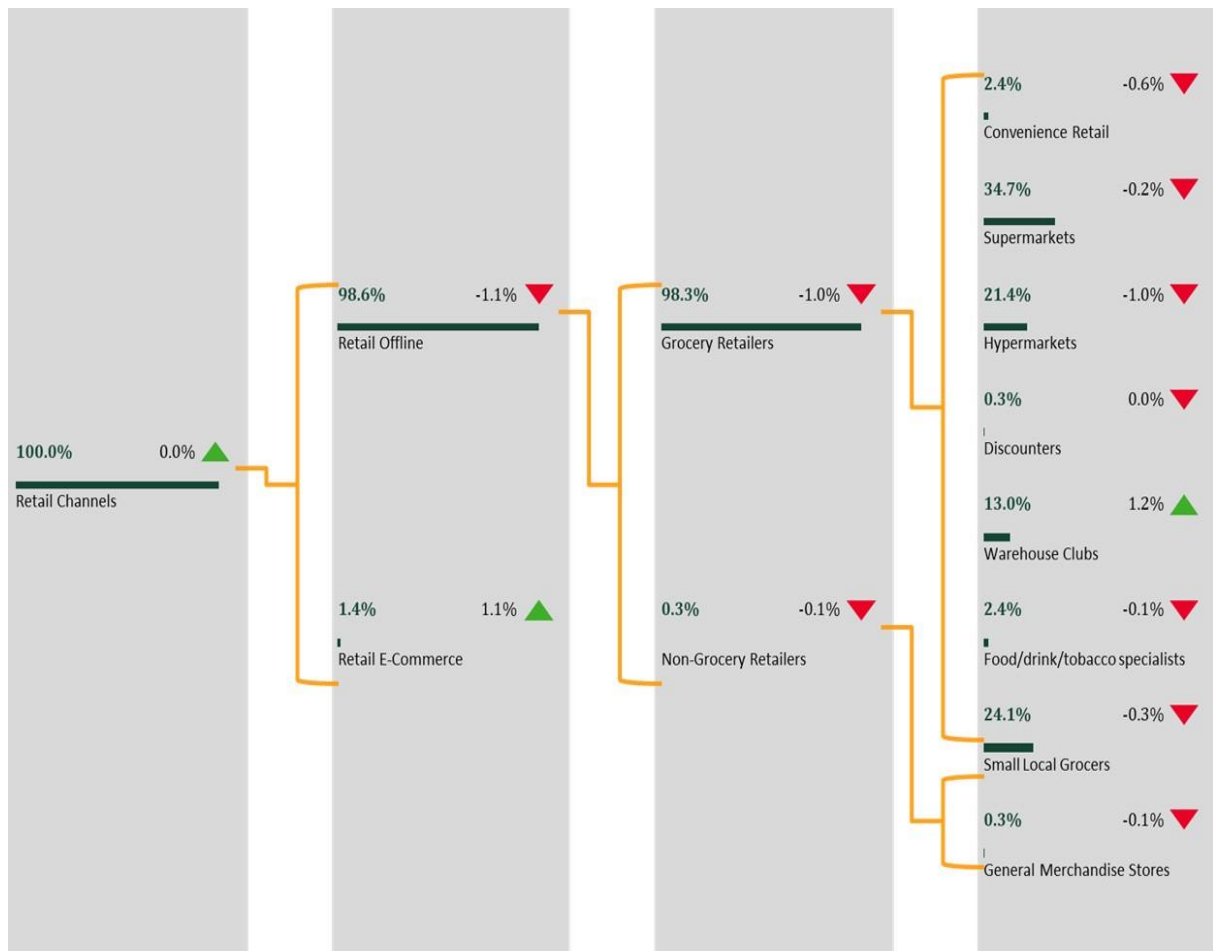
- Percentage of alcohol content
- The warning: “Avoid excessive consumption of alcohol”.

## 5.8.5 Distribution

On-trade sales of beer account for the majority of sales in Brazil, with a share of 58% share by volume. This further reflects the bar and festival culture of Brazil, which has been touched on earlier. Off-trade distribution is made up primarily by grocery retailers, which have a share of 98.3% of retail sales. Supermarkets account for 34.7% of sales, followed by small local grocers with a share of 24.1% and hypermarkets with a share of 21.4%. Retail e-commerce remains a small channel of distribution, accounting for just 1.4% of sales; however, this channel is expected to grow going forward (Figure 5-38).



Figure 5-38: Distribution channel overview of beer in Brazil (2022); off-trade volume



Source: Euromonitor International: Alcoholic Drinks, 2023.

### 5.8.6 Challenges for EU products

The Brazilian market presents a number of challenges for EU producers. First, Brazil currently imposes a tariff rate of 16% on beer products exported from the EU to the country. The price sensitivity of the average Brazilian consumer further means it is difficult to justify spending the additional costs for an EU beer product over a domestic beer. The Brazilian market is dominated by well-established domestic brands, and building brand awareness for EU producers, particularly SME beer producers, can be a slow process. Indeed, Brazil is a major net exporter of beer with some huge global players involved in domestic production. Logistically, transporting and storing a bulky product like beer in a country as vast as Brazil presents several challenges and requires maintaining a reliable supply chain. Understanding the local market, consumer behaviour, and cultural nuances is also key to being successful in this market. EU beers are more likely to be attractive to upper-higher-income consumers, with the cultural nuances best related to this consumer group being the desire for premium, high-quality products.

### **Market Takeaway: Beer**

**Consumption:** *The beer market of Brazil is huge, with an estimated retail value of around EUR 52 billion, one of the largest beer markets globally and the largest in Latin America. Consumption of imported EU beers is likely to mostly attract upper-middle- to higher-income consumers and, to a limited degree, tourists.*

**Competition:** *Brazil is the world's third-largest producer of beer, and domestic brands are well established and highly regarded in the country. Total imports relative to the size of the market are small, with the USA, Uruguay, and Argentina standing as the biggest non-EU exporters.*

**Distribution:** *The bar and festival culture of Brazil lends itself towards allowing on-trade establishments to account for the majority of sales of beer in Brazil, with a share of 58% of sales by volume. Supermarkets represent the largest off-trade retail channel, followed by small local grocers and hypermarkets, with e-commerce remaining a relatively small, albeit growing, channel.*

**Challenges:** *A tariff rate of 16% for EU beers entering the Brazilian market, coupled with the strong domestic production and the logistical challenges surrounding exporting and transporting beer throughout a large market like Brazil, stand as the bigger challenges.*

**Opportunities:** *The overall market is projected to continue growing; lager is the main beer consumed in Brazil, with the market for other beer alternatives being limited, even with regards to the overall market size; and while imports are limited, the EU currently is the largest origin of imported beer.*

## 5.9 Processed meat

### 5.9.1 SWOT analysis

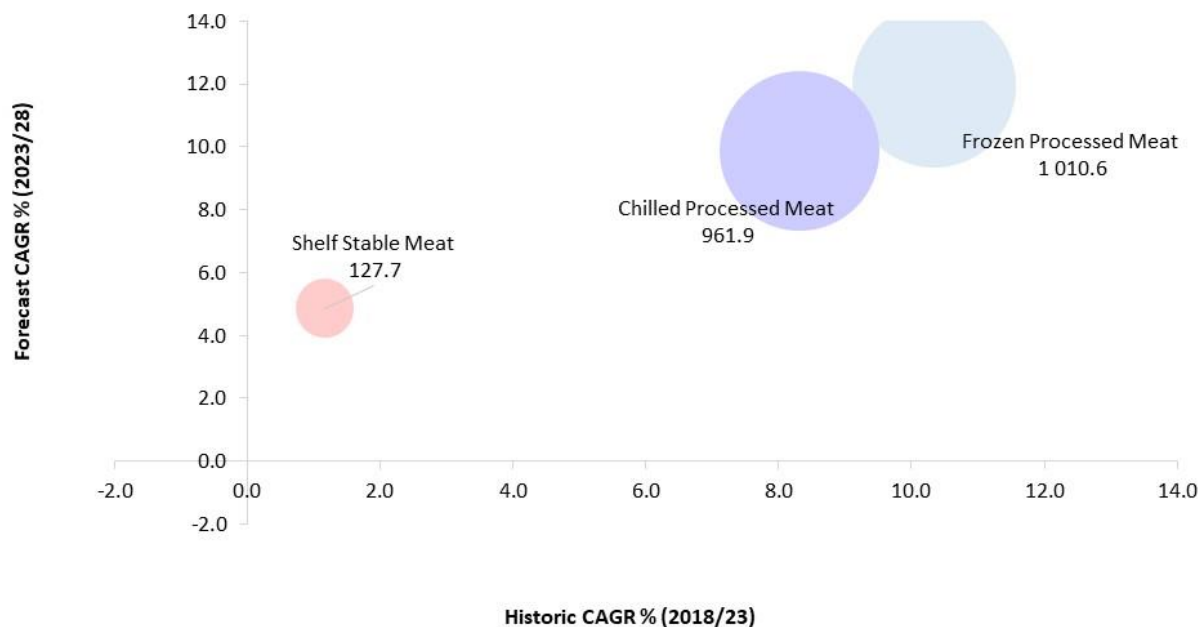
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> <li>▪ Fairly <b>large</b> and <b>fast-growing market</b> for processed meat as a whole.</li> <li>▪ <b>Domestic fresh meat production</b>, while extremely well suited to large scale industrial processed meat production, is almost entirely <b>missing the characteristics necessary for high end charcuterie</b>.</li> </ul>	<ul style="list-style-type: none"> <li>▪ The market is primarily <b>price sensitive</b> and geared towards <b>mass-market industrial products</b>.</li> <li>▪ <b>Massive domestic production</b>, stemming from the high levels of domestic fresh meat production.</li> </ul>
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> <li>▪ <b>Emerging, small niche for charcuterie products</b> but currently very limited domestic supply for this niche.</li> <li>▪ A segment of consumers which pays specific <b>attention to more quality and ethical related considerations</b>.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Very tough competition from domestic producers</b>, which involves some large multinationals which are also present in the fresh meat segment.</li> <li>▪ First signs of emerging <b>artisanal production of charcuterie style products</b>.</li> </ul>

### 5.9.2 Consumption

#### Evolution of consumption

As shown below in Figure 5-39, the market for frozen processed meat is the largest in Brazil at EUR 1.01bn; just ahead of the market for chilled processed meat (EUR 0.96bn). Furthermore, the frozen processed meat segment has grown the quickest over the last five years at 10.3%; and is forecast to continue to be the fastest growing segment at 11.9%. The chilled processed meat segment nonetheless is growing quickly (around 8% historical and 10% forwards). The shelf stable meat market is by far the smallest at EUR 128m; as well as the slowest growing.

**Figure 5-39: Evolution and forecast of the processed meat market in Brazil (million EUR), 2018-2028; total value**



Source: Euromonitor International: Packaged Food, 2023.

## Consumers

While processed meat products are widely consumed, lower and mid income families are a notable segment for the product; as are to a lesser extent, busy single consumers and small (e.g. 2 person) households. There is nonetheless a smaller segment of more affluent consumers seeking premium products. The market for charcuterie-style products is extremely niche, and defined primarily by more affluent consumers who have either travelled to Europe and/or have European ancestry and/or a background in gastronomy.

## Drivers and method of consumption

The key drivers of processed meat consumption as a whole are price and convenience/time saving. Cheaper processed meat products tend to be more affordable than their fresh equivalents, making them particularly popular among lower income to mid income consumers, as indicated above. With regards to convenience on the other hand, consumption is ultimately driven by busier lifestyles, with processed meat products most commonly used to quickly prepare convenient meals.

Among the largest segment of frozen processed meat, poultry is the most common type, accounting for close to 60% of products by volume, with red meat accounting for the balance. However, in the chilled segment, red meat is much more popular – it accounts for around 90% of the segment by volume.

## Purchase criteria

While there are some nuances with regards to purchase criteria depending on the segment, price/value is a common criterion, and is of particular importance for the lower income segment. This in turn connects to the distribution channels through which processed meat is

most commonly purchased; modern retailers such as supermarkets are most commonly associated with offering the best deals.

Brand is frequently a notable criterion, as reflected by brand shares – the most popular four brands combined hold around half of the market. Indeed, the larger players on the market actively work on their branding – whether it be rebranding of existing brands (sometimes as cobranding activities), or the launch of new brands to target certain segments / occasions.

Size and format can be an important consideration for some consumers – most notably those from smaller households. Against this background, single-serving portions are particularly sought after.

Finally, there is a segment which pays specific attention to more quality and ethical related considerations: minimal processing, clean composition/ingredients and sustainable production methods. This is however a niche rather than mass market.

### Recent market trends

As noted above, processed meat has benefitted in recent years as consumers have considered it a cheap substitute to more expensive fresh meat. This is reflected in the high historical and forecast growth rates of both frozen and chilled processed meat. This is, however, not the only trend in the market. Other notable trends are:

- **Increased targeting of young consumers.** The younger (gen Z) consumer has been a notable target of some domestic producers in recent years, with companies launching new brands and/or performing marketing activities specifically to target this demographic. The demographic is seen as a good diversifier away from the slightly older, family-orientated core processed meat consumer.
- **Direct to consumer sales.** One domestic producer (JBS) has recently launched its own store chain and personalised spaces in larger grocery retailers, as well as offering e-commerce sales. This stems from its desire to be closer to consumers. It is yet to be seen to what extent this strategy is successful, but in the case it proves effective, further shifts in retail distribution channels may arise as other producers consider their options.
- **Broadening of portfolios.** Multiple producers have been expanding the range of products they offer, with a notable increase in the range of poultry products. There is some expectation that, as new consumers move to processed meat due to primarily financial considerations, they may become longer term consumers, and appreciate the greater range of offerings. The broadening of portfolios is not, however, solely constrained to the lower end of the market. There has been an “hourglass effect” in the market, whereby innovation / new product launches have been tailored to the two extremes of lower income consumers and affluent consumers.<sup>72</sup>

## 5.9.3 Offer

### Domestic production

In line with Brazil’s massive production of fresh meat (see section 5.1.3), it is also a significant producer of processed meat products; with many of the players in the market being the same. BRF is the number one player across processed meat, fish and alternatives, with a market share of just under 1/3. JBS is the number two with 12%. Two further companies – Gomes da Costa and Camil – have over 10% shares, meaning that the top four companies combined

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<sup>72</sup> Euromonitor International: Packaged food, 2023; <https://blog.viscofandobrasil.com.br/en/interview-the-art-of-charcuterie-in-brazil-part-2>; <https://www.italianfoodexcellence.com/italian-salami-and-cold-cuts-are-expanding-in-brazil/>



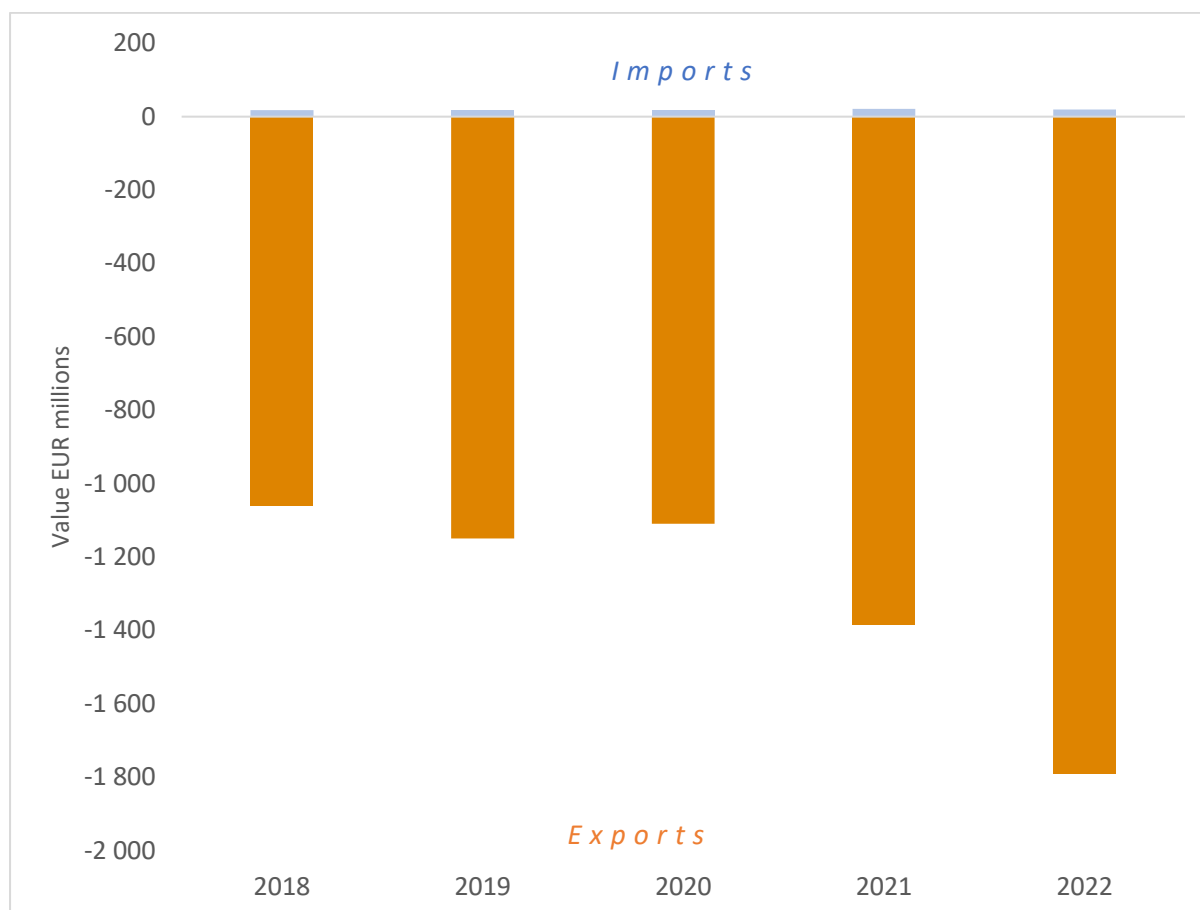
account for close to 2/3 of the market. As can be seen from the previous section, domestic producers are both active and plugged in to the market.

Overall, production in Brazil is primarily industrial, focused on the mass, primarily price-focused market. There is however an emerging artisanal production, as witnessed by the emergence of Brazil's first charcuterie school (*Curato Charcutaria Artesanal*) and the Charcuterie association of Sao Paolo. However, development of this segment is severely limited by the low level of availability of suitable meat, with the breeds and methods of rearing in Brazil generally not considered suitable for the production of high quality charcuterie products.<sup>73</sup>

### Imports and exports

As shown below in Figure 5-40, Brazil is a heavy net exporter of processed meat products. 2022 exports were worth EUR 1.8bn, up from EUR 1.06bn in 2018. In contrast, net imports were valued at just under EUR 20m in 2022, having remained around this level over the preceding five years.

**Figure 5-40: Trade balance (imports and exports) of processed meat in Brazil, 2018-22; value EUR millions**



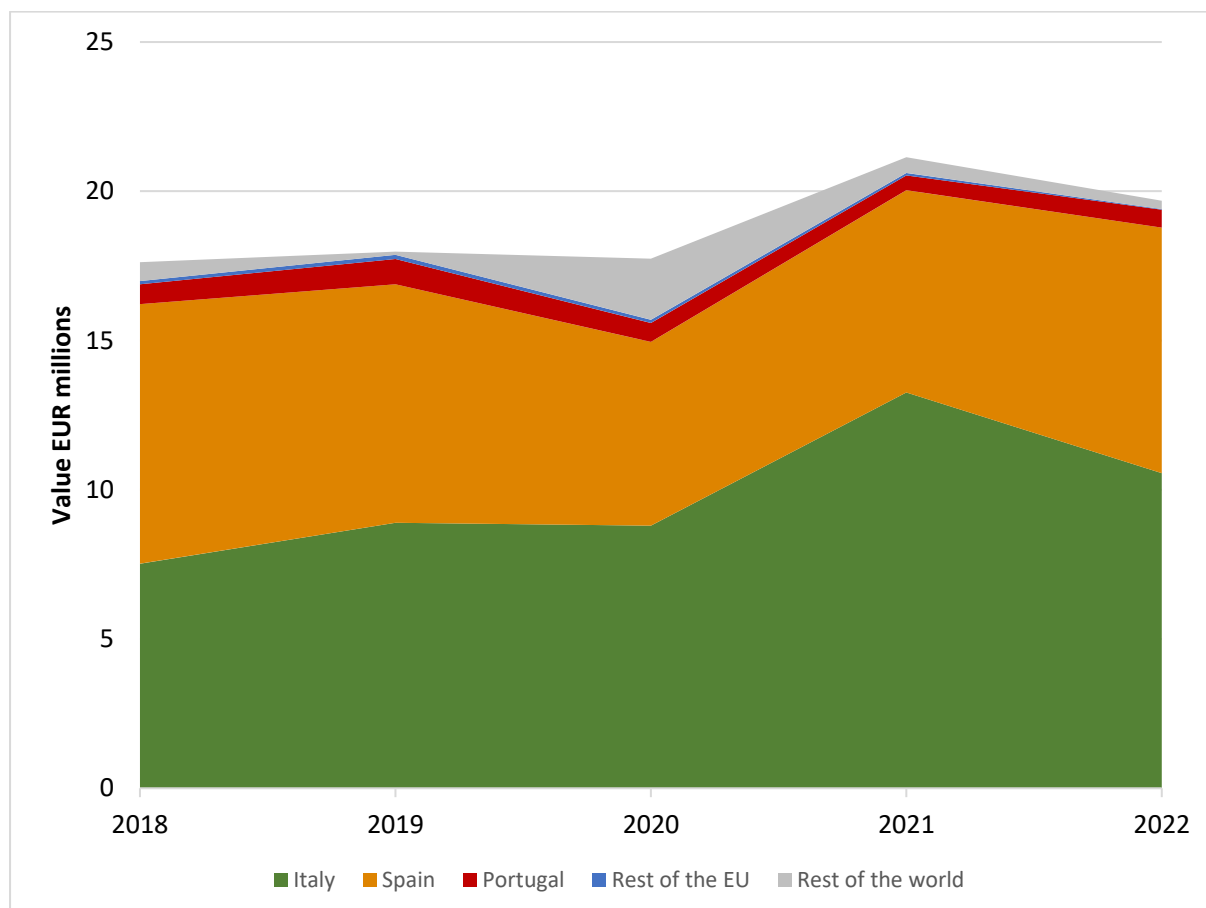
Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN codes 0210, 1601 and 1602.

<sup>73</sup> Euromonitor International: Packaged food, 2023; <https://blog.viscofandobrasil.com.br/en/interview-the-art-of-charcuterie-in-brazil-part-2>

Figure 5-41 further shows the largest origins of processed meat imports are Italy (EUR 10.5m) followed by Spain (EUR 8m). Portugal accounts for a further EUR 0.6m of imports. There are some further minor imports from the rest of the EU (France in 2021 and 2022; and France plus Germany between 2018 and 2020). Overall, the EU combined has consistently accounted for around 90% or more of processed meat imports, with Argentina the only notable non-EU origin. The vast majority (around 85%) of these imports fall under the HS code 0210 (salted, in brine, dried or smoked meat).

**Figure 5-41: Brazilian imports of processed meat by country, 2018-22; value EUR millions**



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN codes 0210, 1601 and 1602.

### EU GI products

As noted in section 4.2.4, there is a register of protected GIs. Prosciutto di San Daniele is currently included on the list of protected DOs.

### Main competitors

Competition is almost entirely defined by the plentiful domestic production. Brazil is a huge producer and exporter of processed meat products, with the large domestic meat producers also generally active in the processed meat market. Domestic production is however very much geared to mass-market, industrial production, leaving a small unaddressed niche for certain products. This shows through in the origin of imports – while import values are very small, they are dominated by products of European origin.

## 5.9.4 Specific market entry requirements

### Market Access and Entry

The customs procedures for importing foodstuffs are set out in section 4.2.1. A full list of the general documentary requirements for export set out in Table 4-1, along with requirements by product category in Table 4-2. Requirements for processed meat notably include: a certificate of analysis; inspection of agricultural products; registration of importers of agricultural products; registration of foodstuffs of animal origin; veterinary health certificate for animal products; and permit to import products of animal origin; with further requirements in certain cases. Establishments need to be approved in order to export meat to Brazil. A searchable list of these is available at the following link:

[https://sistemas.agricultura.gov.br/pga\\_sigsif/pages/view/sigsif/consultahabilitacaoestrang/in dexEstabelecimentoEstrangeiro.xhtml;jsessionid=hrJGlpXDWXKqcJX1r8GbJGkqB6JCSnybq9JNP3JTfHQGT2p9m2NQ!988972512](https://sistemas.agricultura.gov.br/pga_sigsif/pages/view/sigsif/consultahabilitacaoestrang/in dexEstabelecimentoEstrangeiro.xhtml;jsessionid=hrJGlpXDWXKqcJX1r8GbJGkqB6JCSnybq9JNP3JTfHQGT2p9m2NQ!988972512)

In terms of tariffs, processed meat generally faces tariffs of between 8 and 12.8%.

**Information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:**

**Main page – select product, country of origin and destination country:**

<https://trade.ec.europa.eu/access-to-markets/en/home>

**Example link – Sausages and similar products, of meat (1601) from Spain to Brazil**

<https://trade.ec.europa.eu/access-to-markets/en/search?product=1601&origin=ES&destination=BR>

### Standards, SPS measures

Comprehensive information on the legislation relevant to animal products, including meat products can be found at the following website of MAPA:

<https://www.gov.br/agricultura/pt-br/assuntos/inspecao/produtos-animal/empresario/registro-de-produtos-rotulagem>

This includes: technical regulations on the identity and quality, registration requirements and any additional labelling requirements for meat products. It should be remembered that, as set out on that page, products and labels must be registered with DIPOA. There are types of processed meats (e.g. hams) in particular – which may struggle to comply with the RTIQ and hence need to undergo the individual analysis process during registration.

### Labelling

Packaged processed meat must conform to the labelling requirements for packaged foods set out in section 4.2.3.

## 5.9.5 Distribution

As shown below in Figure 5-42, modern grocery retailers dominate the distribution of processed meat, seafood and alternatives in Brazil. Supermarkets account for 54% of sales, and hypermarkets a further 21%. The remaining quarter of the market is mainly split between small local grocers (12%), warehouse clubs (6%) and general merchandise stores (5%). Online retail remains very much a niche at under 1%.

**Figure 5-42: Distribution channel overview of processed meat, seafood and alternatives in Brazil (2023); retail value**



Source: Euromonitor International: Packaged Food, 2023.

### 5.9.6 Challenges for EU products

EU producers face two notable challenges. Firstly, off the back of its huge meat production, Brazil is a massive producer and exporter of processed meat; with several large players on the market who are well plugged in to consumer trends. Secondly, the Brazilian market overall is highly price sensitive and geared towards lower income consumers; as witnessed by the recent tendency for consumers to trade down from fresh meat to processed meat. A further final challenge which should not be underestimated is the issue of market access, with the need for individual establishments to be approved for export; and some processed meat products potentially falling outside the RTIQ and hence needing to undergo the individual analysis process during registration. Nonetheless, the market shows potential if market access can be negotiated; as long as promotion is used to help boost awareness of the uniqueness of EU products.

### **Market Takeaway: Processed meat**

**Consumption:** High and growing level of consumption. Market skews strongly towards the economy end, though some smaller high-end opportunities.

**Competition:** Entirely from domestic producers, who dominate the market with their economical, large scale production which responds well to consumer demands.

**Distribution:** Supermarkets and hypermarkets are dominant, accounting for some 75% of distribution combined. Small local grocers account for just over a further 10%.

**Challenges:** competing with domestic producers, and the strong price focus of the market overall.

**Opportunities:** a very small, but emerging niche for charcuterie products, which Brazilian producers largely struggle to address due to the limited availability of domestically produced meat suitable for such products.



## 5.10 Pasta

### 5.10.1 SWOT analysis

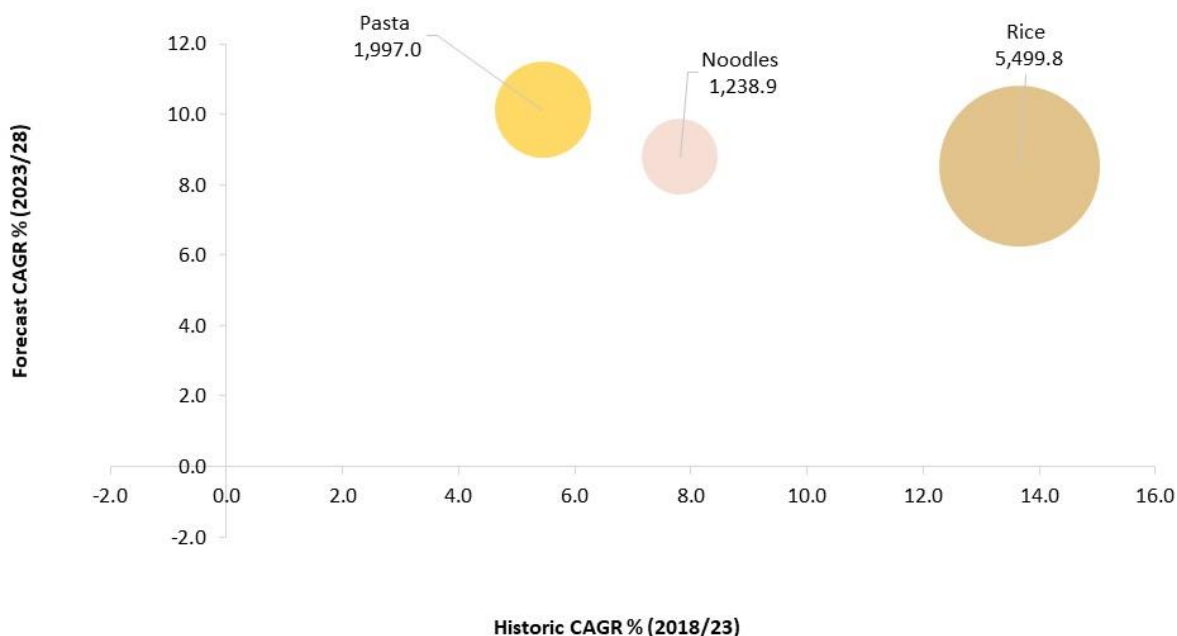
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> <li>▪ The <b>EU</b> is the <b>main exporter</b> of pasta to Brazil with Italian pasta exports alone accounting for two-thirds of total imports.</li> <li>▪ <b>Lack of any major non-EU competitor</b> outside of domestic producers.</li> <li>▪ Notable <b>populations of Italian heritage</b> which help support pasta consumption in the country / pasta's incorporation in Brazilian dishes.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Rice</b> is more commonly consumed in Brazil as the go-to on the go staple of preference.</li> <li>▪ Pasta exported from the EU are subject to a <b>tariff rate of 12.8%</b>.</li> </ul>
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> <li>▪ Pasta is <b>anticipated to grow</b> at a faster rate of retail value compared to rice and noodles in the short term (until 2028).</li> <li>▪ The <b>consumer base</b> is increasingly becoming <b>more environmentally conscious</b> which is seeing a <b>growing number of consumers adapt a plant base diet</b>, which directly aids pasta sales in the market.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Domestic producers</b> largely <b>cater to domestic demand</b> for <b>budget and economic</b> pasta products.</li> <li>▪ <b>Rising</b> amount of artisanal and premium <b>producers</b> of Pasta in Brazil.</li> </ul>

### 5.10.2 Consumption

#### Evolution of consumption

The pasta, noodles and rice market had a total market size of over EUR 8.7 billion, the majority of is made up from the rice market which is valued at EU 5.4 billion. Pasta accounts for a value of EUR 1.9 billion and is forecast to be the fastest growing product category within this sector with an anticipated CAGR of 10.1% up until 2028 (Figure 5-43).

**Figure 5-43: Evolution and forecast of market for pasta compared to rice and noodles (EUR million) in Brazil, 2017-2027**



Source: Euromonitor International: Packaged Food, 2023.

## Consumers

Pasta is a staple in Brazilian cuisine, with the product long established in the country largely thanks to the history of Italian immigrants. The product has long ceased being an “exotic” product consumed mainly by Italian descendants and rather has evolved into a staple (albeit slightly more special one) which is consumed by the majority of the population. Some commonly consumed pasta dishes in Brazil including *Macarronada* (Brazilian pasta dish that typically features spaghetti), *Patelao de Forno* (baked pasta pie) and *Lasanha* (standard lasagne). The popularity of pasta spans across a diverse consumer base with some notable groups including:

- **Families and households.** Pasta is a popular choice for families and households in Brazil, its versatility allowed for a range of meal options making it a convenient choice for busy households. Pasta dishes such as spaghetti or lasagne are often prominent dishes during family dinners and gatherings.
- **College students and young professionals.** College students and young professionals with busy lifestyles often opt for pasta as a quick and affordable meal. Easy to cook pasta dishes are commonly inexpensive to prepare and provide plenty of nutritional content which compliments this consumer group particularly.
- **Vegans and Vegetarians.** Pasta is a versatile option for those following vegetarian or vegan diets. The consumer base of Brazil is slowly moving towards a more vegan and vegetarian diet, the popularity of fresh meat in the country means it limits the availability of other options for vegan and vegetarian consumers during BBQs or get togethers in the country, in this sense, pasta tends to serve as a viable alternative product.

### **Drivers and method of consumption**

With the product well established in Brazil, (see above), versatility is the main driver of pasta in Brazil as pasta serves as the neutral base that can be paired with a wide range of sauces, proteins, vegetables and flavours allowing for diverse culinary creations. Affordability is often a key factor as pasta is often priced inexpensively in Brazil making it accessible to a broad range of consumers. Its affordability is particularly appealing to individuals on a budget. The quick and easy preparation of pasta further contributes to its popularity in Brazil. Dried pasta which has a long shelf life make it a convenient product for many consumers in Brazil.

Pasta is often consumed in traditional dishes with notable pasta types including spaghetti, fettuccine and penne. Pasta salads are common in Brazil and often cold salads are consumed at BBQs and family and friend get togethers. Stuffed pasta such as ravioli and tortellini is increasingly popular as is the presence of pasta in stir-fried dishes.

### **Purchase criteria**

Consumers may have preferences for specific pasta types or shapes depending on the dish they intend to prepare. The quality of ingredients used in pasta is a significant criterion for many consumers, high-quality durum is often associated with better pasta quality. Packaging design is a consideration for some consumers with resealable packaging proving to be attractive to many consumers. Price is the crucial factor for many consumers, while pasta is generally perceived to be an affordable option, consumers may compare prices and consider the perceived value for money, especially if they are buying in larger quantities or opting for premium varieties. Other key considerations include nutritional content, origin, certifications, and labels, cooking time and consumer reviews and recommendations.

### **Recent market trends**

Some of the more observable trends in the pasta market of Brazil include the ongoing trend in the food industry in rising catering to health and wellness. Consumers are becoming more conscious of their dietary choices, seeking pasta options that are perceived as healthier such as whole grain, multigrain or gluten free alternatives which is opening a new and growing market for premium alternative pasta products. The rise of plant-based diets and the demand for alternative protein sources have influenced various food markets which extends particularly to pasta, rising vegetarianism and veganism within the Brazilian consumer base is acting as a key recent market driver for sales in the market for pasta. Premium and artisanal pasta which incorporate high-quality ingredients and distinctive textures are further rising in demand in Brazil.

## **5.10.3 Offer**

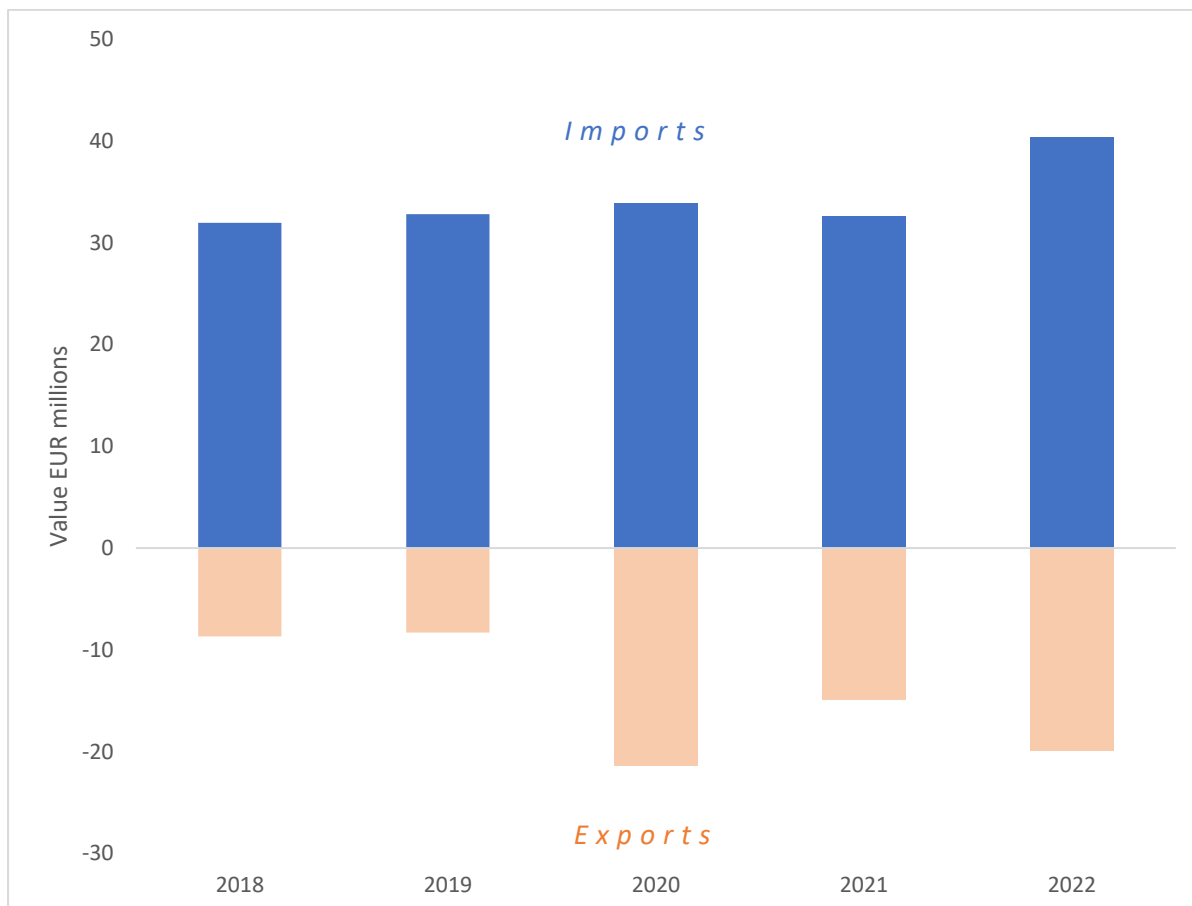
### **Domestic production**

Within Brazil there are several medium to large scale producer of pasta with the largest companies by market share being M.Dias Branco, J.Macedo and Selmi. Most major pasta producers tend to be located near regions of high wheat production or urban centres where there is a concentration of food processors. Brazilian domestic production of pasta largely caters to domestic demand which leaves a limited market for imports which will be discussed in the next section.

## Imports and exports

As shown in Figure 5-44, Brazil is a net importer of pasta products (which is included within the wider group of pasta, noodles and couscous) with Brazil importing EUR 40 million worth of pasta products in 2022; this compares to a total export figure of EUR 20 million in the same year. Total imports in 2022 represented a five year high in total imports signalling that demand for imported pastas is growing in Brazil.

**Figure 5-44: Trade balance (imports and exports) of pasta, noodles and couscous in Brazil, 2018-22; value EUR millions**

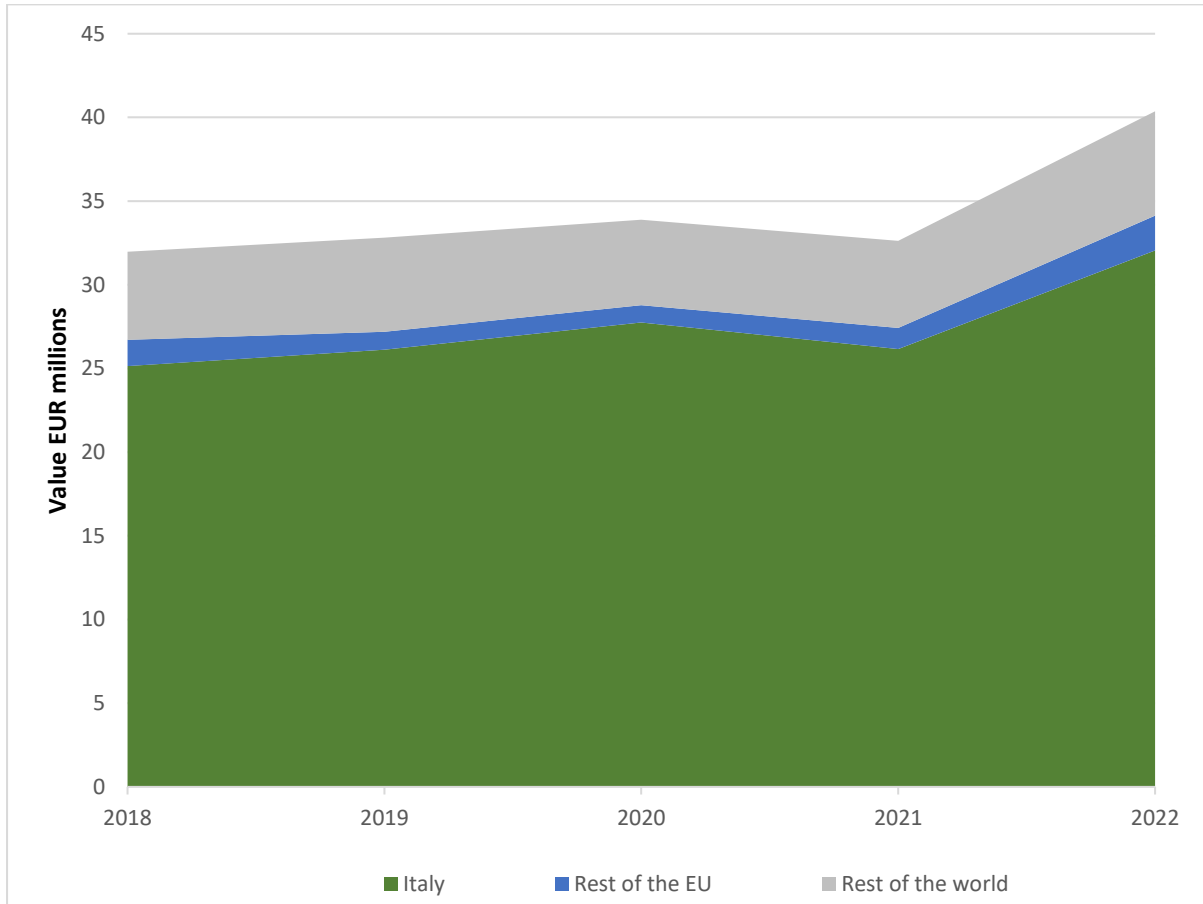


Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 1902.

Italy is by far the largest exporter of pasta to Brazil as shown in (Figure 5-45), with Italian exports coming to a value of EUR 32 million which represents 66% (or two-thirds) of total pasta, noodle and couscous imports into Brazil. The rest of the EU accounted for a total of EUR 2 million, largely from the Netherlands; this EUR 2 million figures represented 13% of total imports. China and the US are the largest non-EU exporters to Brazil.

**Figure 5-45: Brazilian imports of pasta, noodles and couscous by country, 2018-2022; value EUR millions**



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 1902.

### EU GI products

As noted in section 4.2.4, there is a register of protected GIs. No relevant GIs for EU pasta were identified.

### Main competitors

Domestic production of pasta largely caters for total demand within the internal market of Brazil which limits the presence of imported pasta to a degree, although within the premium high end market for pasta, Italian origin is often desired if not expected from consumers that seek out these products. In this sense, the EU has limited competition when catering specifically to the high end premium market of Brazilian pasta consumers.

## 5.10.4 Specific market entry requirements

### Market access and entry

The customs procedures for importing foodstuffs are set out in section 4.2.1. A full list of the general documentary requirements for export set out in Table 4-1, along with requirements by



product category in Table 4-2. In some cases, pasta may require a non-automatic import licence, veterinary health certificate for animal products and a permit to import products of animal origin.

In terms of tariffs, pasta generally faces an ad valorem tariff of 12.8%.

**Information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:**

***Main page – select product, country of origin and destination country:***

<https://trade.ec.europa.eu/access-to-markets/en/home>

***Example link – pasta, noodles, couscous category (1902) from Italy to Brazil***

<https://trade.ec.europa.eu/access-to-markets/en/search?product=1902&origin=IT&destination=BR>

### Standards, SPS measures

[RDC 711/2022](#), which includes sanitary requirements for various types of cereal based products is the key standard of relevance for pasta.

### Labelling

Pasta must conform to the labelling requirements for packaged foods set out in section 4.2.3.

### 5.10.5 Distribution

As shown below in Figure 5-46 grocery retailers account for the main channel of pasta distribution in Brazil with a share of 91% of sales. Supermarkets accounted for 42% of all pasta sales in Brazil which is followed up by hypermarkets which accounted for 20.9% of sales and small local grocers which account for 18% of sales. Other notable channels of distribution include warehouse clubs with a share of 9.1% and general merchandise stores with a share of 8.8%.

Figure 5-46: Distribution channels of pasta in Brazil (2023); retail value



Source: Euromonitor International: Packaged Food, 2023.

### 5.10.6 Challenges for EU products

Brazilian domestic production of pasta largely caters to the market for cheap and affordable pasta in the Brazilian market which is the majority of the market as demand for premium imported pasta (mainly from Italy) tends to come from upper-middle- and higher-income earners which is a smaller segment of the total market of consumer market of Brazil. Price competitiveness is not help by the 12.8% tariff rate currently applied to EU pastas exported to Brazil which further limits the capacity for EU exporters to target and appeal to lower middle- and lower income earners in Brazil.

### **Market Takeaway: Pasta**

**Consumption:** Pasta is commonly consumed in Brazil as it forms a key component of many traditional dishes. Some of the most important consumer groups emerging and established in Brazil include family households, young students and works and vegan and vegetarians.

**Competition:** Almost exclusively from domestic producers who largely cater to total demand from lower-income and lower-middle income earners; the market for EU pastas which are viewed as a premium product is largely within the upper-middle- and higher-income earner consumer base.

**Distribution:** Distribution mainly from grocery retailers with supermarkets alone accounting for 42% of total distribution, this is followed by hypermarkets (share of 20%), small local grocers (18%) and to a lesser degree warehouse clubs (9%) and general merchandise stores (9%).

**Challenges:** Domestic production largely caters to demand for budget economic pasta products which limits EU pastas to largely only catering to upper-middle- and higher-income earners; this is further complicated by the presence of a 12.8% tariff rate on EU pasta exports.

**Opportunities:** Growing vegan and vegetarian consumer base coupled with rising demand for artisanal and premium pasta in Brazil which EU pasta (mainly of Italian origin) is perceived to be.

## 5.11 Processed Fruit and Vegetables

### 5.11.1 SWOT analysis

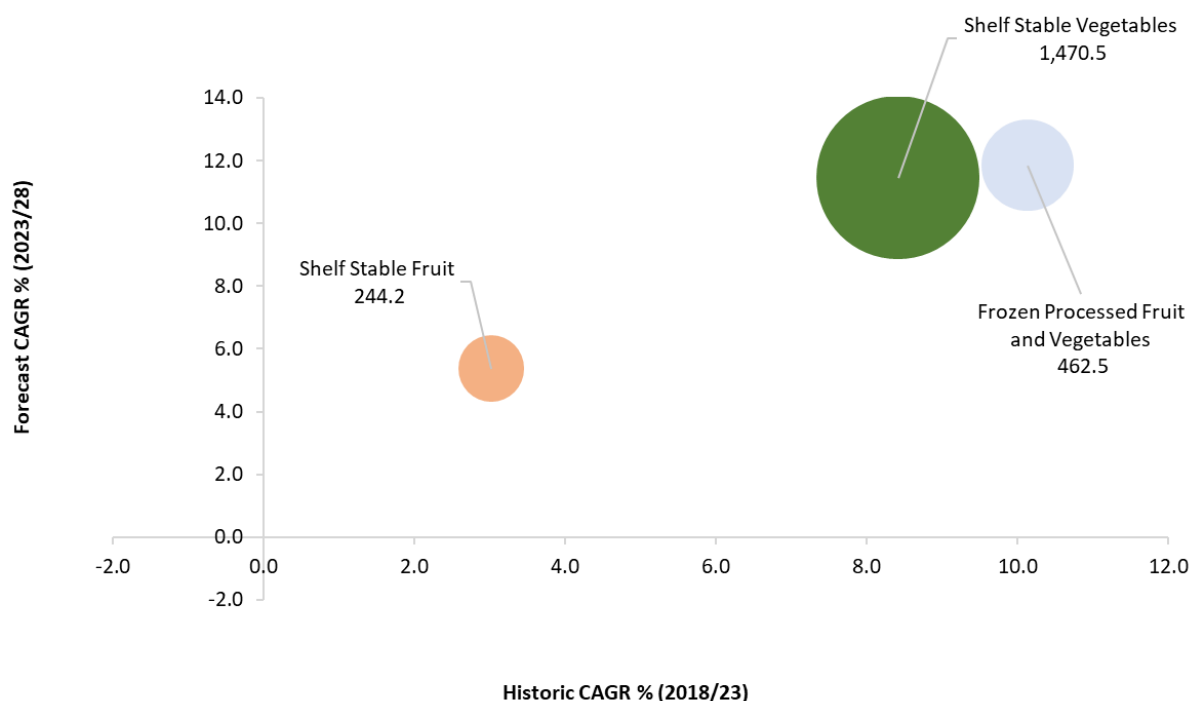
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> <li>▪ The processed fruit and vegetables <b>market</b> has been <b>growing</b> in recent years and is forecast to continue to grow at a good pace.</li> <li>▪ Brazil still has a <b>large consumer base</b> with unrealised consumption potential.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Brazil is a very <b>large producer</b> of both fresh fruits and vegetables, which enables the country to also be a strong producer of processed fruit and vegetables.</li> <li>▪ <b>Shelf stable fruit</b> is the smallest market with lowest forecasted growth.</li> </ul>
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> <li>▪ Shelf stable vegetables are the largest category, with mainly <b>shelf stable tomatoes and beans</b> being interesting. Frozen processed fruit and vegetables have the highest forecasted growth, with <b>frozen processed potatoes</b> standing out.</li> <li>▪ <b>Innovative products</b>, as well as <b>healthy and nutritious options</b> are increasingly in demand.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Chile</b> and <b>Argentina</b> are the largest competitors in terms of fresh fruits imports to Brazil and the largest export competitors for fresh vegetables are <b>Argentina</b> and <b>China</b>.</li> <li>▪ The main competitors company wise are <b>Heinz Brazil, Angelo Auricchio &amp; Cia, and McCain</b>.</li> </ul>

### 5.11.2 Consumption

#### Evolution of consumption

The total market size of the processed fruit and vegetables market in Brazil in 2023 was around EUR 2.20 billion. Figure 5-48 shows that shelf stable vegetables are the largest category with a market size of about EUR 1.47 billion. This is followed by frozen processed fruit and vegetables with EUR 462 million and shelf stable fruit with EUR 244 million. All categories have been growing in recent years and are forecast to continue to grow in the years to come at stronger CAGRs than previously. Frozen processed fruit and vegetables and shelf stable vegetables have the highest forecasted CAGR's (11.9% and 11.5% respectively).

**Figure 5-48: Evolution and forecast of the processed fruit and vegetables market in Brazil, 2017-2027; retail value (EUR million)**



Source: Euromonitor International: Packaged Food, 2023.

## Consumers

Consumers in Brazil who opt for processed fruit and vegetables encompass a broad spectrum of groups. Busy consumers like students and young adults often rely on these options due to their convenience, as they fit into their busy lifestyles. Families seeking quick, nutritious meals for children also find processed fruits and vegetables appealing. Convenience remains a significant factor across the board, with easy storage, extended shelf life, and minimal preparation requirements driving many consumers' choices. Moreover, older adults may prefer processed fruits and vegetables for their ease of digestion or preparation, particularly if they have difficulty with cooking fresh produce. Finally, the affordability of processed fruits and vegetables compared to fresh produce attracts budget-conscious consumers; and the increasing emphasis on health-conscious eating habits further drives their popularity among those prioritising a healthy diet in Brazil.

## Drivers and method of consumption

As noted above, convenience is an overarching notable driver. Throughout 2023, Brazil experienced a slowdown in food inflation. Nonetheless, certain consumer goods maintained higher prices, placing financial constraints on households. This situation, which particularly affected low and mid-income households, made them adjust their shopping habits by reducing overall purchases and turning to more processed products. Thus, the recent shift towards processed fruit and vegetables stemmed not only from their convenience but also their affordability in some cases. This underscores the impact of economic factors on consumption patterns, with processed fruit and vegetables serving as accessible alternatives.

Additionally, drivers such as changing lifestyles, heightened health awareness, and the demand for the consistent availability of all kinds of fruit and vegetables regardless of season contribute to the sustained demand for processed fruit and vegetables options in Brazil.



Processed fruits and vegetables are sometimes consumed directly as snacks or incorporated into various dishes during cooking. Popular choices for home cooking include canned tomatoes and frozen vegetables. Additionally, they are frequently used to prepare beverages such as smoothies, and desserts.

### **Purchase criteria**

As is the case for most products, quality is an important criterion. A good taste and the presence of desirable ingredients without unnecessary additives also influence purchase decisions. Price sensitivity drives many consumers to seek affordable options that offer good value for money. Generally, processed fruit and vegetables tend to be cheaper than fresh produce, but this is not always the case. Additionally, nutritional value is essential for health-conscious consumers, who seek products rich in vitamins, minerals, fibre, and antioxidants. Convenience is another significant factor, with consumers preferring products that are easy to store, prepare, and consume. The packaging can play a role in consumer perception as well as brand reputation, as some consumers prefer to purchase established brands.

### **Recent market trends**

Recent market trends in the processed fruit and vegetables market in Brazil reflect shifting consumer preferences and emerging opportunities for growth. Processed vegetables, tomatoes, and beans have seen increased demand as consumers seek more affordable options amidst inflation. Shelf-stable tomatoes are experiencing growth driven by consumer awareness of different brands and private labels, particularly in the peeled tomato segment used for sauces. Frozen processed potatoes have emerged as a strong performer, fuelled by investments in production, new product development, and marketing by key players like McCain. Although facing challenges in perceived innovation, efforts are underway to target specific consumer segments, such as the introduction of products designed for air fryer cooking to appeal to younger consumers. Health and wellness trends are also driving innovation, with producers focusing on minimally processed frozen fruit and vegetables to meet consumer demand for nutritious options. Additionally, the expansion of frozen processed vegetables beyond traditional offerings aligns with sustainability and health-conscious trends, promising new experiences for Brazilian consumers and further growth opportunities in the market.

## **5.11.3 Offer**

### **Domestic production**

Brazil is a significant producer of fresh fruits and vegetables, with annual production exceeding 41 million tonnes of fruit and around 20 million tonnes of vegetables. This ample supply of fresh produce also fuels a substantial domestic production of processed fruits and vegetables. Throughout the country, numerous processing facilities, strategically located in regions known for agricultural abundance, play a key role in transforming raw produce into processed goods.

Even though the market is quite fragmented, one strong market leader stands out: Heinz Brasil Ltda with a value market share of close to 27%, mainly due to its Quero brand. Heinz is followed by Angelo Auricchio & Cia Ltda (a domestic company) with close to 9%, due to its Olé brand. McCain do Brasil Alimentos Ltda ranks third with its McCain brand.

### **Imports and exports**

Identifying data on trade in processed fruit and vegetable product is extremely complicated due to the number of different lines under which such products can be imported. Data on trade

in processed fruit and vegetables is ultimately captured under the trade data for fruit and vegetables in section 5.2.

### EU GI products

As noted in section 4.2.4, there is a register of protected GIs. No relevant GIs for EU processed fruit and vegetables were identified.

### Main competitors

The main competitor to exports from the EU is the domestic market as Brazil is a very large producer of both fresh fruits and vegetables, which enables the country to also be a strong producer of processed fruit and vegetables. Chile and Argentina are the largest competitors in terms of fresh fruits imports to Brazil and the largest export competitors for fresh vegetables are Argentina and China. The main competitors company wise are Heinz Brazil, Angelo Auricchio & Cia, and McCain.

## 5.11.4 Specific market entry requirements

### Market access and entry

The customs procedures for importing foodstuffs are set out in section 4.2.1. A full list of the general documentary requirements for export set out in Table 4-1, along with requirements by product category in Table 4-2. In some cases, processed fruit and vegetables products may require: an inspection of agricultural products; registration of importers of agricultural products; non-automatic import licence and a phytosanitary certificate.

In terms of tariffs, rates for processed fruit and vegetables vary but are frequently 8%.

**information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:**

***Main page – select product, country of origin and destination country:***

<https://trade.ec.europa.eu/access-to-markets/en/home>

***Example link – frozen fruits (0811) from Spain to Brazil***

<https://trade.ec.europa.eu/access-to-markets/en/search?product=0811&origin=ES&destination=BR>

### Standards, SPS measures

Processed fruit and vegetable products generally fall under the remit of ANVISA, with standards covered by [RDC 726/2022](#) on sanitary requirements for mushroom, fruit and vegetable products.

In a few cases – most notably the case of dried fruit/vegetables - products fall under the remit of MAPA. For such cases, comprehensive information on the relevant legislation including: technical regulations on the identity and quality, registration requirements and labelling can be found at the following two websites of MAPA:

<https://www.gov.br/agricultura/pt-br/assuntos/inspecao/produtos-vegetal/legislacao-de-produtos-origem-vegetal/legislacaoPOV>

<https://www.gov.br/agricultura/pt-br/assuntos/inspecao/produtos-vegetal/rotulos-e-embalagens-dipov/rotulos-e-embalagens-para-produtos-vegetais-padronizados>

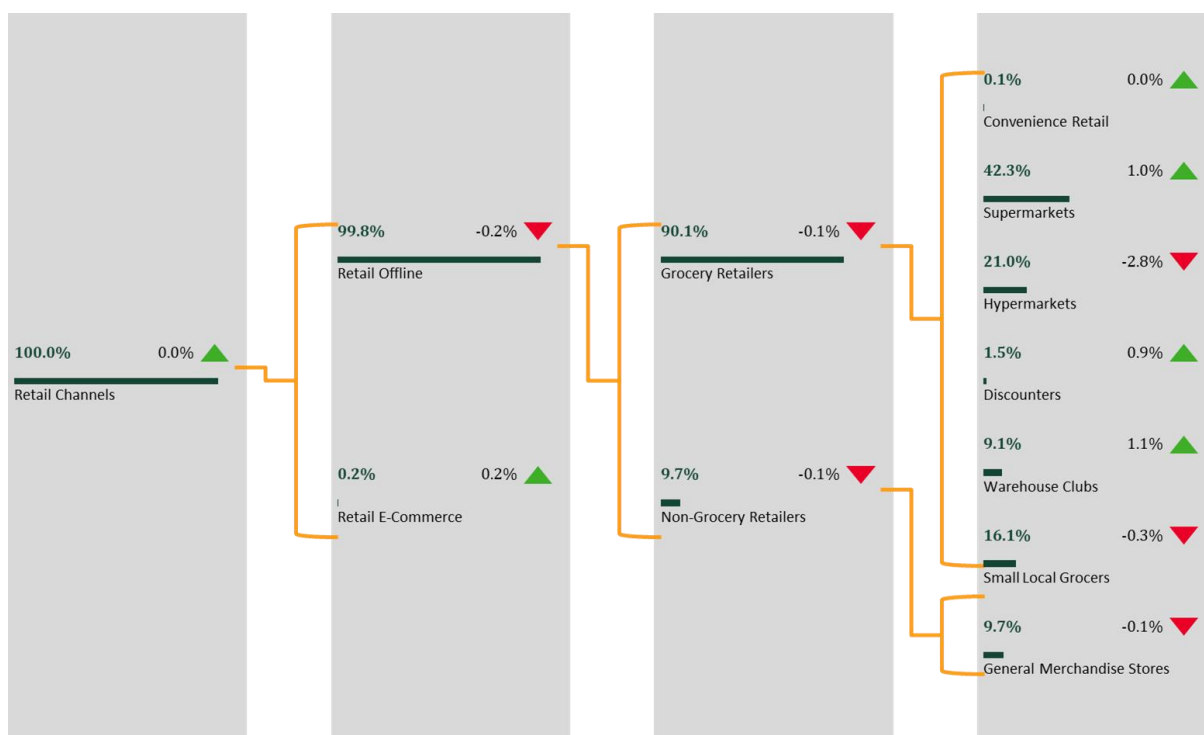
## Labelling

Packaged processed fruit and vegetables must conform to the labelling requirements for packaged foods set out in section 4.2.3.

### 5.11.5 Distribution

As outlined in Figure 5-47, offline retail accounts for nearly all sales (99.8%). Grocery retailers account for most of processed fruit and vegetables sales in Brazil, with supermarkets accounting for a share of around 42.3% of all sales. Hypermarkets are also significant, with a share of 21.0% of sales, followed by small local grocers with a share of 16.1% of sales. The popularity of warehouse clubs is increasing. Even though it has been growing, the e-commerce channel remains negligible.

**Figure 5-47: Distribution channel overview of processed fruit and vegetables in Brazil (2023); retail value**



Source: Euromonitor International: Packaged Food, 2022.

### 5.11.6 Challenges for EU products

A number of challenges exist for EU processed fruit and vegetables producers seeking to enter the Brazilian market. Firstly, Brazil is a very strong domestic producer of fresh fruit and vegetables, and thus also has a large capacity for producing processed fruit and vegetables. Most domestic Brazilian products are competitive both in terms of price and quality. Even though fragmented, the market is dominated by multinational and domestic large companies. In addition, Brazil also is close to a number of other fruit and vegetable producers such as Argentina and Chile, which are able to address shortfalls in domestic production where needed.

### **Market Takeaway: Processed fruit and vegetables**

**Consumption:** *The total market size of the processed fruit and vegetables market in Brazil in 2023 was around EUR 2.20 billion. The market is forecast to continue to grow.*

**Competition:** *Domestic production is the strongest competition. Multinational and domestic companies dominate the market (Heinz, McCain and Brazilian Angelo Auricchio & Cia). Chile, Argentina and China are the main competitors regarding exports to Brazil of fresh fruit and vegetables.*

**Distribution:** *Nearly everything is distributed via grocery retailers, with supermarkets, hypermarkets and small local grocers being the main channels. Warehouse clubs have been growing in popularity.*

**Challenges:** *Substantial domestic production and consumers being loyal to brands such as Heinz, McCain and Brazilian Angelo Auricchio & Cia. Domestic products are often cheaper than EU products but also of good quality.*

**Opportunities:** *Shelf stable vegetables largest category, with mainly tomatoes and beans being interesting; frozen processed fruit and vegetables have the highest forecasted growth, with mainly frozen processed potatoes being interesting; innovative products, healthy and nutritious options.*

## 5.12 Sugar confectionery

### 5.12.1 SWOT analysis

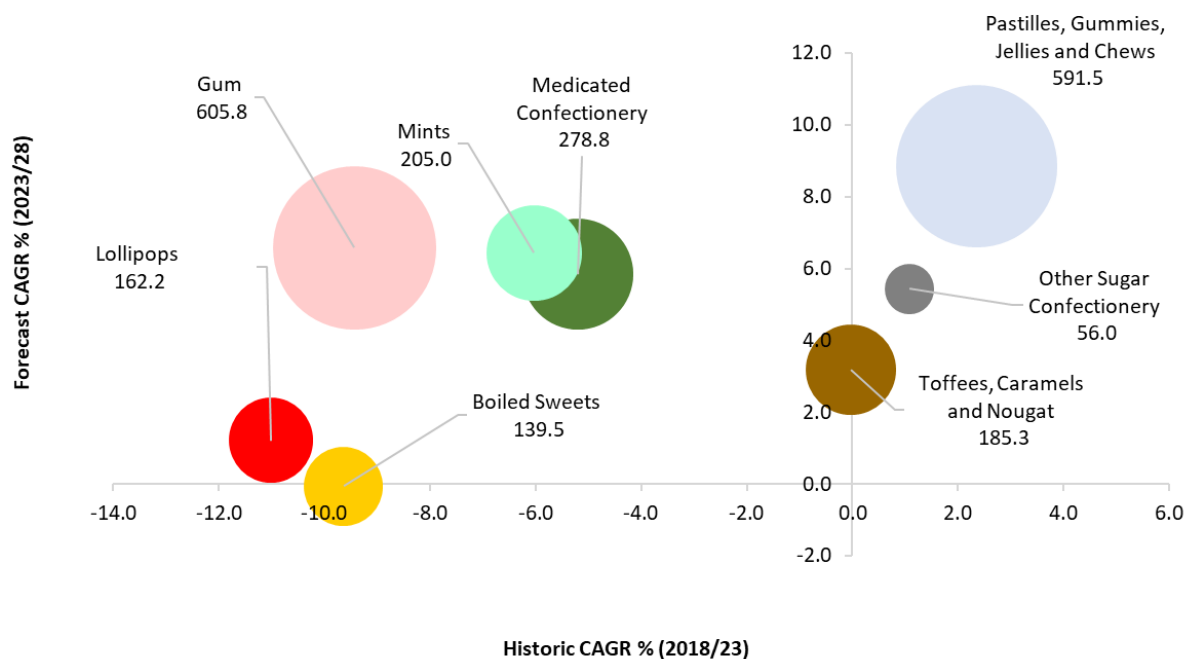
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> <li>▪ The <b>market</b> is forecast to <b>grow</b> at good rates. In particular the larger categories (e.g. pastilles, gummies, jellies, and chews).</li> <li>▪ Brazil's sugar confectionery <b>imports are growing</b> and nearly doubled between 2021 and 2022.</li> <li>▪ The EU (mainly Spain) accounts for around <b>18% of</b> all sugar confectionery <b>imports</b> to Brazil.</li> </ul>	<ul style="list-style-type: none"> <li>▪ The <b>rising health consciousness</b> of consumers might negatively affect demand overall.</li> <li>▪ Brazil is a <b>strong net exporter</b> of sugar confectionery.</li> <li>▪ The sugar confectionery <b>unit value</b> from EU products is <b>lower</b> than that of world's average and main exporter China.</li> </ul>
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> <li>▪ In <b>larger categories</b> e.g. pastilles, gummies, jellies and chews, as well as gums, and mints.</li> <li>▪ <b>Healthy sugar confectionery</b> with <b>therapeutic ingredients</b>.</li> <li>▪ Products with <b>regional flavours</b> that are sustainably produced, as well as products evoking nostalgia.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Large domestic sugar production</b> with Brazil being the world's leader.</li> <li>▪ <b>Domestic and international companies</b> dominate the market (Dori Alimentos, Arcar Group, Mondelez).</li> <li>▪ The main exporters of sugar confectionery to Brazil are <b>China</b> and close by countries <b>Ecuador and Argentina</b>.</li> </ul>

### 5.12.2 Consumption

#### Evolution of consumption

The sugar confectionery market had a market size of EUR 1.62 billion in 2023. Gum is the largest category in Brazil with a total retail value of EUR 606 million, followed by pastilles, gummies, jellies and chews with approximately EUR 592 million. Medicated confectionery ranked third with around EUR 279 million and is followed by mints (EUR 205 million), toffees, caramels, and nougat (EUR 185 million), lollipops (EUR 162 million), and boiled sweets (EUR 140 million). Historically between 2018 and 2023, many categories declined and the few that grew, did so at a slow pace. Between 2023 and 2028 on the other hand, all categories are forecast to grow in value terms, with pastilles, gummies, jellies and chews forecast to grow the fastest with a CAGR of 8.9%. In general, the larger categories are forecast to grow faster than the smaller categories (Figure 5-48).

**Figure 5-48: Evolution and forecast of the sugar confectionery market in Brazil, 2018-2028; retail value EUR million**



Source: Euromonitor International: Packaged Food, 2023.

## Consumers

Brazilian consumers of sugar confectionery come from different demographics and have diverse preferences. Busy individuals frequently turn to sugar confectionery as convenient snacks amidst hectic schedules or as a quick energy boost during study sessions or work breaks. Families with children commonly purchase sugar confectionery for household consumption, often viewing them as treats for kids. Overall, sugar confectionery holds particular appeal to younger consumers who seek out these treats for moments of indulgence and enjoyment. Price-conscious consumers are more likely to purchase sugar confectionery rather than e.g. chocolate confectionery due to its cheaper price point. Health-conscious consumers, though a smaller segment, may occasionally indulge in certain types of sugar confectionery. However, these consumers gravitate towards options with reduced sugar content, natural ingredients, or specific dietary attributes. Due to the ethnic diversity and different regions in Brazil, different consumer group may have different sugar confectionery preferences depending on their heritage and region.

## Drivers and method of consumption

The sugar confectionery market is influenced by several factors driving consumption patterns. Despite a slow performance in 2023, there was an improvement from previous years, partly due to increased out-of-home activities and consumer traffic in commercial areas after the Covid-19 pandemic. Gummies, in particular, experienced growth thanks to ongoing innovation and a wider variety of flavours, including those catering to local tastes. In addition, sugar confectionery is affordable and readily available everywhere from supermarkets to street vendors.

However, the industry faces challenges due to regulations promoting healthier eating habits and addressing health issues like obesity and dental problems. To adapt, confectionery



companies are innovating to meet changing consumer preferences, and thus offer healthier options, to stimulate growth.

Sugar confectionery is a sweet treat for personal indulgence, and thus an integral part of daily life. Brazilians frequently enjoy sugar confectionery, whether as a midday snack to boost energy levels or as a dessert after meals. The nation's snacking culture further amplifies the popularity of sugar confectionery, serving as convenient, on-the-go treats that satisfy cravings and provide moments of sweet enjoyment throughout the day.

### Purchase criteria

The purchase of sugar confectionery is influenced by several key factors. Brazilian consumers prioritise a wide variety of flavours and textures, ranging from traditional to contemporary options. Brand reputation for quality and consistency, coupled with affordability, also plays a significant role. Eye-catching packaging and presentation can be attractive to consumers. Increasingly, nutritional considerations impact purchase decisions, with preferences for natural ingredients or reduced sugar content. Additionally, confectionery products with cultural significance evoke nostalgia and appeal to consumers' sense of heritage.

### Recent market trends

Some of the most influential recent market trends within the Brazilian sugar confectionery market include:

- **Growth in demand for gummies.** The market for gummies stands out as one of the largest, with the highest forecasted growth. This surge is largely attributed to continuous innovation and an expanding variety of flavours, tailored to suit local preferences. Companies such as Haribo use their Brazilian manufacturing facility to profit from this trend and thus further fuelling the popularity of gummies among Brazilian consumers.
- **Healthier sugar confectionery on the rise.** A notable trend is the development of healthier sugar confectionery options that cater to the growing segment of health-conscious consumers. These innovative products often incorporate functional ingredients known for their health benefits, while still keeping the indulgent appeal traditionally associated with sugar confectionery. By finding a balance between health and indulgence, companies ensure their relevance in the market while meeting the shifting demands of Brazilian consumers.
- **Utilising consumers nostalgia.** Sugar confectionery products with nostalgic connections were trending in 2023, as they offer consumers a comfort during challenging times. There was a noticeable yearning for the past, that influenced purchasing decisions. Brands capitalised on this sentiment by incorporating unique regional ingredients and flavours into their offerings, aiming to transport consumers back to fond memories associated with those tastes. This strategic approach not only serves as a distraction from concerns about traditionally high-sugar confectionery but also fosters a deeper emotional connection with consumers, as they reminisce about shared experiences and moments from the past.
- **Interest in local ingredients and taste.** This movement mirrors a global trend towards locally sourced products, with manufacturers aiming to attract consumers by offering authentic Brazilian flavours in their sugar confectionery creations. Companies incorporate a diverse array of traditional Brazilian ingredients such as Açaí, Cupuaçu, and Cajá, alongside exotic fruits. By aligning their brands and products with local values and ingredients, manufacturers not only cater to consumers' preferences but also showcase their dedication to sustainability, cultural diversity, and the quality of the food they offer, which resonates with the growing demand for authentic and responsibly sourced products.

- **Rising appeal of therapeutic Ingredients.** There is a rising trend towards incorporating therapeutic ingredients to enhance functional benefits. Gummies, serving as an effective delivery system for vitamins, present opportunities for product differentiation and market expansion. Ingredients like Aloe vera, green tea, caffeine, and Xylitol offer anti-inflammatory, antioxidant, and dental health benefits, and thus cater to health-conscious consumers that seek indulgence with added nutritional value. This convergence of taste, nutrition, and functionality is driving innovation and consumer interest in the market.

### 5.12.3 Offer

#### Domestic production

Brazil stands as the world's largest sugar producer, holding a significant share of the global market. During the 2022 crop cycle alone, Brazil accounted for over 20% of total global sugar production. Recent data highlights the industry's growth, with cane sugar production witnessing a notable increase from over 35 million tonnes in the 2021 harvest to over 36 million tonnes in 2022. This large output secures Brazil's strong position in the global sugar market, sustaining its status as a powerhouse in sugar production and export. Against this background, it is unsurprising that Brazil is a major producer of sugar confectionery.<sup>74</sup>

The sugar confectionery market in Brazil is relatively fragmented, however the largest companies currently are: Dori Indústria e Comércio Produto Alimentício Ltda with a 12% market share by value. It is mainly known for brands such as Yogurte 100, and Deliket. Arcor do Brasil Ltda, with its Arcor brand ranks second with a market share of 8%. This is followed by Mondelez Brasil Ltda with 7% due to popular brands such as Halls.

Dori Alimentos, the market leader, has been established in 1967 and is headquartered in Marília, São Paulo. Dori Alimentos is the leading producer of jellies, candies, peanuts, and confectioneries in Brazil. With a presence that extends beyond national borders, their products are distributed in over 50 countries worldwide. It has a workforce of over 2 000 employees.<sup>75</sup>

Established in 1951 in Argentina, the second market leader Arcor Group began as a confectionery factory with a mission to provide quality products worldwide. Today, the company operates over 40 industrial plants across Latin America and stands as the primary food company in Argentina, Brazil, Chile, and Peru. Initially focusing on certain sweets, Arcor has evolved to become the world's leading confectionery producer, having seven industrial plants, with one of them being in Brazil.<sup>76</sup>

#### Imports and exports

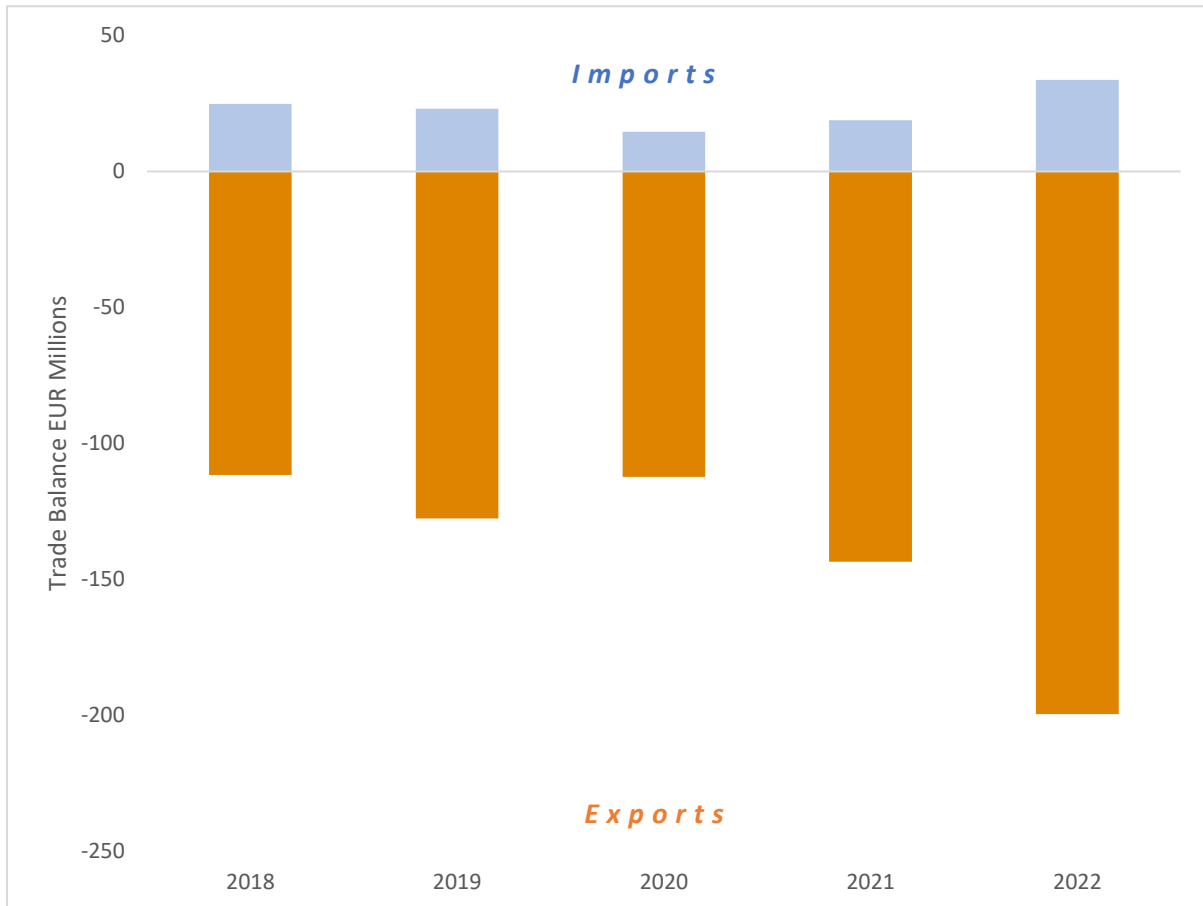
As Figure 5-49 below shows, Brazil is a net exporter of sugar confectionery products. It exported around EUR 200 million worth of sugar confectionery products in 2022 while it imported EUR 34 million in the same year. Total imports decreased between 2019 and 2020 and then increased between 2020 and 2022. Between 2021 and 2021 imports nearly doubled.

<sup>74</sup> Pathways for Brazil to sustainably transform its sugar industry (2023). <https://blogs.worldbank.org/agfood/pathways-brazil-sustainably-transform-its-sugar-industry#:~:text=According%20to%20the%202023%20Brazilian,%2C%20an%20increase%20of%203.4%25>.

<sup>75</sup> Dori Alimentos S.A., <https://dori.com.br/>

<sup>76</sup> Arcor, <https://www.arcor.com/en/>

**Figure 5-49: Trade balance (imports and exports) of sugar confectionery in Brazil 2018-2022; EUR millions**

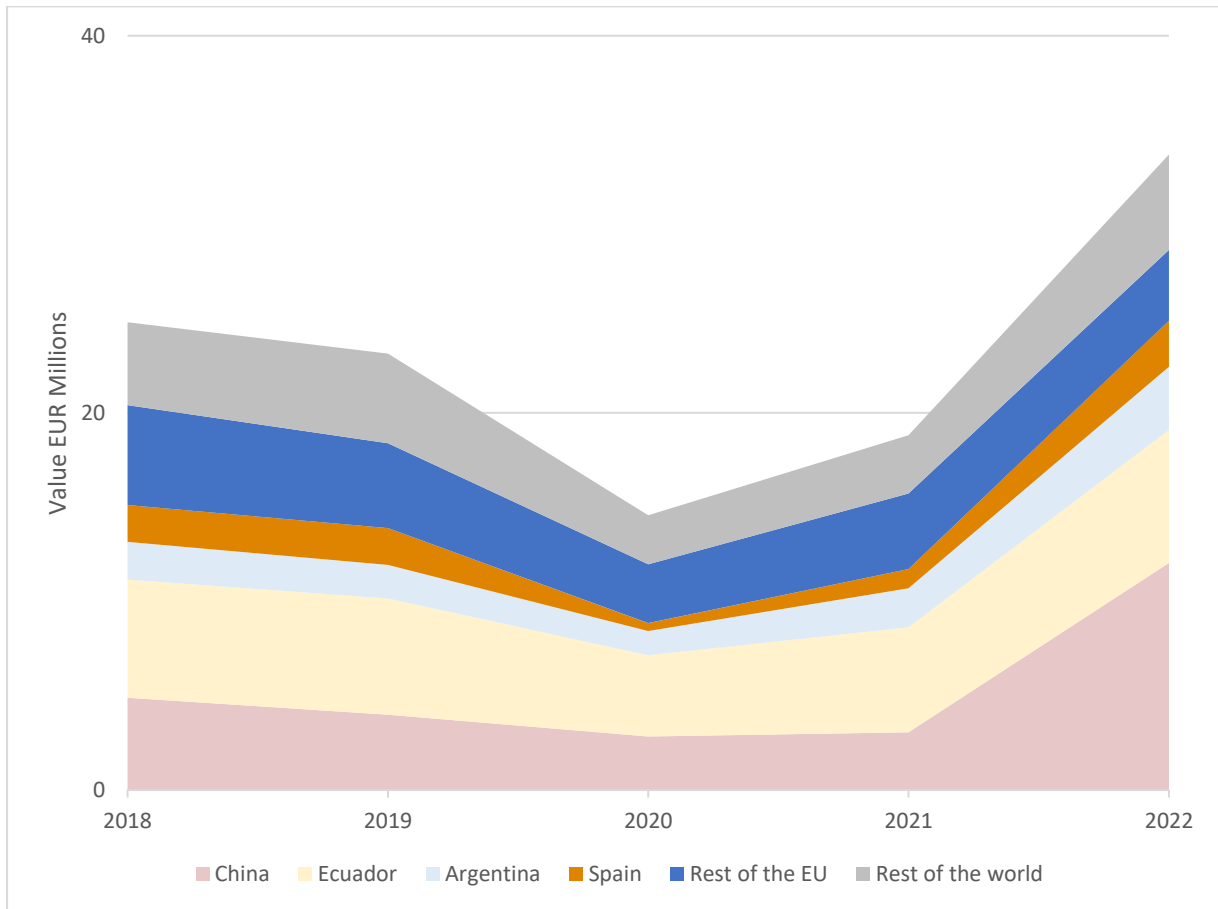


Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 1704.

As can be seen in Figure 5-50, China is the largest exporter of sugar confectionery products to Brazil by some distance, with the country accounting for around 35% of total imports in 2022. Ecuador is the second-largest exporter, followed by Argentina. Spain is the largest exporter from the EU, with the country exporting around EUR 2.4 million worth of sugar confectionery products to Brazil in 2022. Other notable EU member states with a small amount of exports include Czech Republic (EUR 1.1 million), Germany (EUR 0.7 million) and Belgium (EUR 0.7 million). The EU as a whole accounted for around 18% of sugar confectionery imports into Brazil.

**Figure 5-50: Brazilian imports of sugar confectionery products by country, 2018-22; EUR millions**

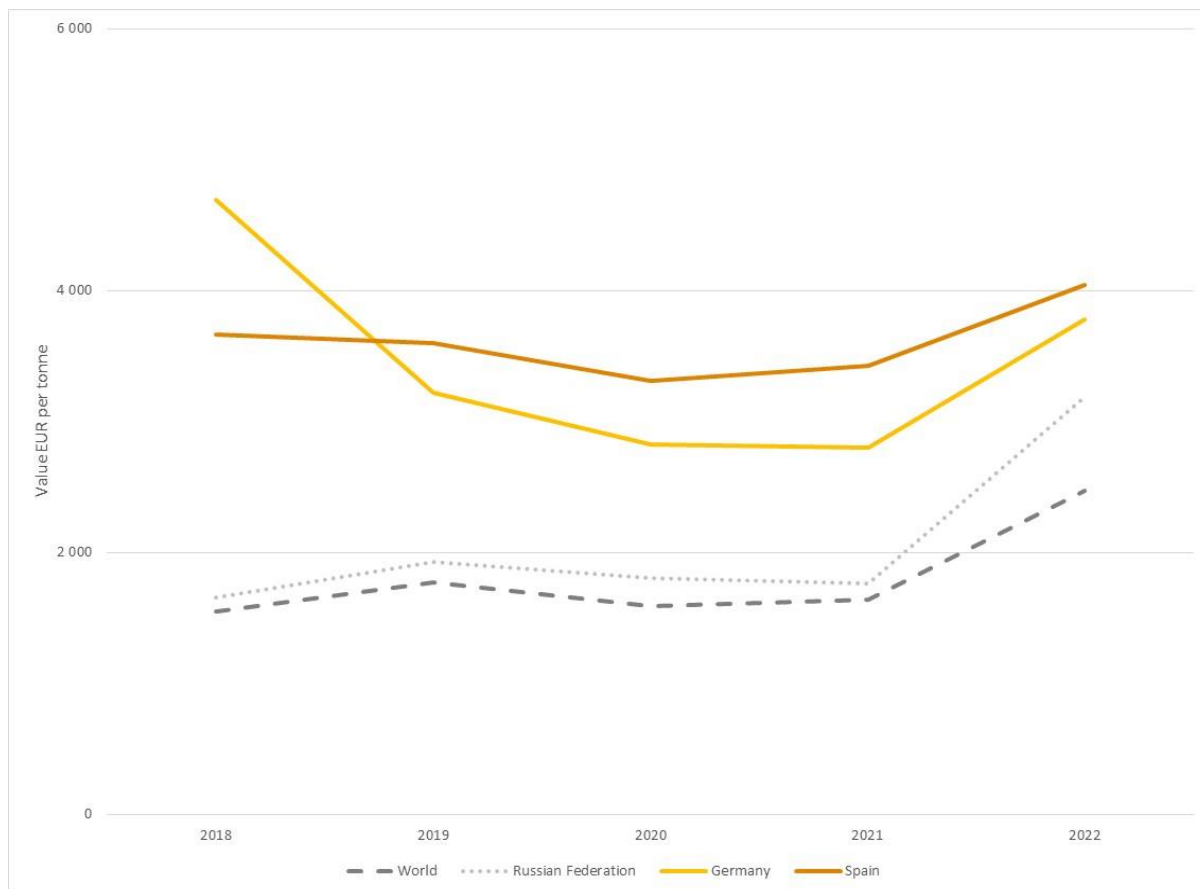


Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 1704.

The world's average unit value of sugar confectionery exports to Brazil is higher than that of the main exporter China, as well as the main EU exporters Spain and Czech Republic. In 2022 it stood at EUR 3 900 per tonne, whereas the unit value of products from China was around EUR 3 240, the one of Spain at EUR 2 660, and the one of the Czech Republic at EUR 2 610 per tonne. Thus, the unit value of products from the two main EU sugar confectionery exporters to Brazil was not only lower than the world's average, but also lower than that of the main competitor China (Figure 5-51).

**Figure 5-51: Per unit value of Brazilian imports of sugar confectionery product for selected countries, 2018-22 (EUR per tonne)**



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 1704.

### EU GI products

As noted in section 4.2.4, there is a register of protected GIs. No relevant GIs for EU sugar confectionery were identified.

### Main competitors

The main competition in the Brazilian sugar confectionery market comes from domestic production, which is significant with Brazil being the world's leading sugar producer. Thus, the market leader is the Brazilian company Dori Alimentos. However, in second place is a Argentinian company (Arcor Group) that nevertheless also produces its products domestically in Brazil. The international company Mondelez ranks third. However, the sugar confectionery market is overall rather fragmented which means many other competitors exist.

The main competition regarding imports of sugar confectionery into Brazil for the EU comes from China and Ecuador.

## 5.12.4 Specific market entry requirements

### Market access and entry

The customs procedures for importing foodstuffs are set out in section 4.2.1. A full list of the general documentary requirements for export set out in Table 4-1, along with requirements by product category in Table 4-2. A non-automatic import licence may be required for sugar confectionery.

In terms of tariffs, sugar confectionery faces an ad valorem tariff of 8%.

**Information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:**

**Main page – select product, country of origin and destination country:**

<https://trade.ec.europa.eu/access-to-markets/en/home>

**Example link – general sugar confectionery category (1704) from France to Brazil**

<https://trade.ec.europa.eu/access-to-markets/en/search?product=1704&origin=FR&destination=BR>

### Standards, SPS measures

The key standard for confectionery is [RDC 723/2022](#) on the sanitary requirements for various confectionery products.

### Labelling

Sugar confectionery must conform to the labelling requirements for packaged foods set out in section 4.2.3.

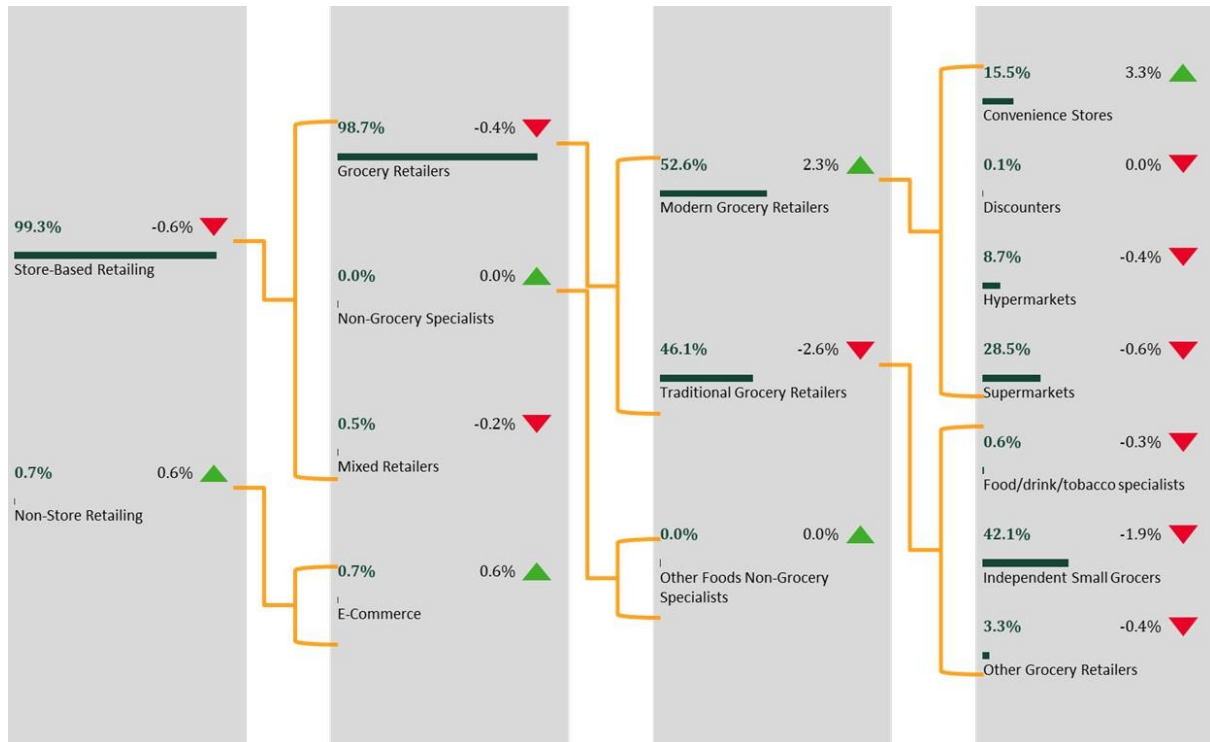
## 5.12.5 Distribution

As shown in Figure 5-52, offline retail accounts for nearly all sales (99.7%). Grocery retailers account for most of sugar confectionery sales in Brazil, with small local grocers accounting for a share of around 37.4% of all sales. Food/drink/tobacco specialists are also significant, with a share of 19.2% of sales, followed by supermarkets with a share of 16.7% of sales. Overall, the popularity of grocery retailers increased in the last years, whereas the popularity of non-grocery retailers decreased.

Self-service stalls in shopping malls are becoming increasingly popular as a primary retail option for buying sugar confectionery. Positioned within large shopping centres, these stalls, whether independent or franchised, offer customers a convenient and interactive shopping experience.



**Figure 5-52: Distribution channel overview of Sugar confectionery in Brazil (2023); retail value**



Source: Euromonitor International: Packaged Food, 2023.

EU products face challenges in the Brazilian market due to the dominance of domestic production, especially considering Brazil's status as the world's largest sugar producer. Additionally, both local and international giants control a significant portion of the market. However, compared to other food categories, the confectionery market in Brazil is relatively fragmented, presenting potential opportunities for EU exporters. Brazil remains a robust net exporter of sugar confectionery, importing only about EUR 34 million worth in 2022. The EU contributed approximately 18% to these imports, however, China and Ecuador remain the primary exporters of sugar confectionery to Brazil. Moreover, as consumers increasingly prioritise health, this could potentially negatively affect the market.

### **Market Takeaway: Sugar Confectionery**

**Consumption:** The sugar confectionery market had a market size of EUR 2.23 billion in 2023. Gum is the largest category followed by pastilles, gummies, jellies and chews. After some stagnant years, the market is forecast to grow.

**Competition:** Mainly from domestic production as Brazil is the world's largest sugar producer. Ecuador and China are the largest exports of sugar confectionery to Brazil.

**Distribution:** Nearly everything is distributed via grocery retailers, with small local grocers, food/drink/tobacco specialists, and supermarkets being the main channels.

**Challenges:** Brazil being the largest sugar producer and a net exporter of sugar confectionery. Domestic and international giants having strong positions in the market. Rising health-consciousness of consumers.

**Opportunities:** Gummies, healthy sugar confectionery, therapeutic ingredients, nostalgic products, products with regional favours, and sustainable products.

## 5.13 Biscuits / cereal bars

### 5.13.1 SWOT analysis

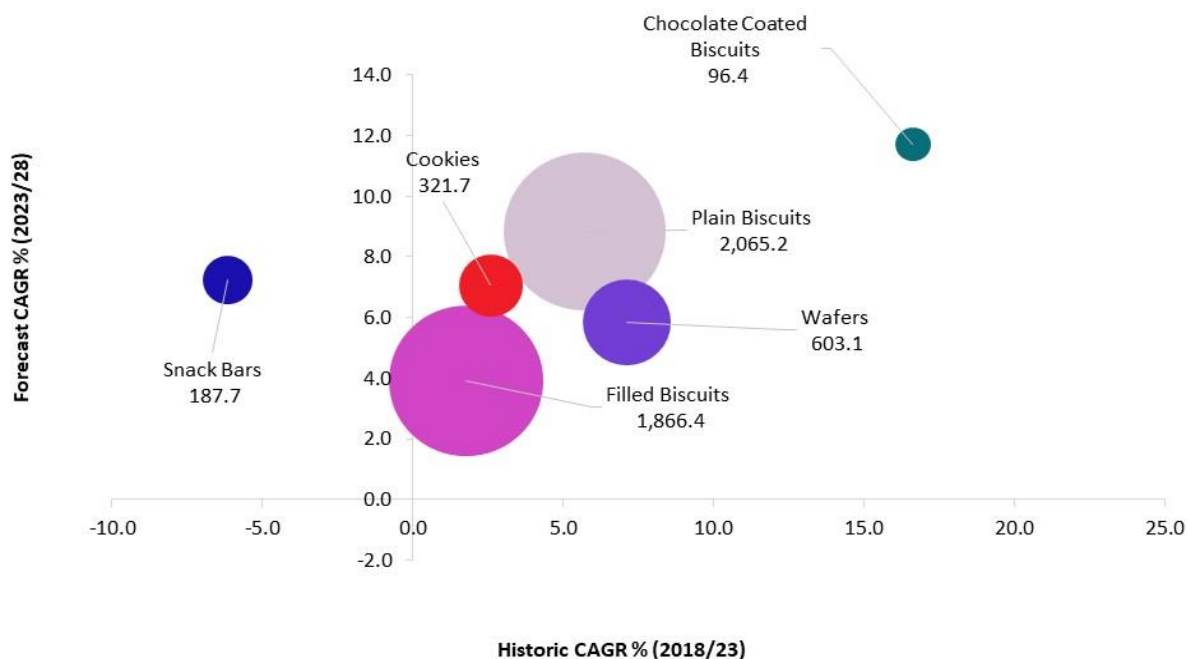
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> <li>▪ <b>Consumption</b> of biscuit and cereal bar products is <b>anticipated to grow</b> in the short term across all major product categories.</li> <li>▪ The <b>EU</b> has a <b>dominant</b> position in <b>total exports</b> to Brazil, with the largest exporters globally being Italy (30% share of exports), Poland (18%) and Germany (6%). In total EU exports to account for 63% of Brazil's imports.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Despite the EU being globally the largest exporter, <b>total exports by value remain</b> small relative to the size of the Brazilian market with EU exports coming to a value of EUR 38 million.</li> <li>▪ <b>A 14.4% tariff rate</b> is applied to EU exports of biscuit and cereal bar products to Brazil.</li> </ul>
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> <li>▪ <b>Demand for healthier variants of biscuit and cereal bars</b> is growing.</li> <li>▪ The <b>Brazilian government</b> has been <b>prone to reducing or removing tariffs</b> during periods of high inflation in the country for biscuit and cereal bar products.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Domestic production</b> largely caters to domestic demand at present.</li> <li>▪ <b>Limited competition</b> from products exported from <b>Argentina, Russia, and Thailand</b>.</li> </ul>

### 5.13.2 Consumption

#### Evolution of consumption

The market for sweet biscuit and snack bars in Brazil is large, one of the largest in Latin America with a total retail value of EUR 5.1 billion. The largest product category by retail value is plain biscuits with are valued at EUR 2 billion, this is followed by filled biscuits to a value of EUR 1.8 billion, wafers to a value of EUR 603 million, cookies at a value of EUR 321 million, snack bars to a value of EUR 187 million and finally chocolate coated biscuits to a value of EUR 96 million. Despite chocolate coated biscuits being the least valued retail product, it is the fastest growing with a predicted CAGR of 11.7% anticipated until 2028. Across all major categories outlined, there is a predicted positive CAGR for the period to 2028 (Figure 5-53).

**Figure 5-53: Evolution and forecast of the market for sweet biscuits and snack bars in Brazil, 2018-2028; EUR million**



Source: Euromonitor International: Packaged Food, 2023.

## Consumers

Consumption of biscuit and cereal bars in Brazil cross most major consumer groups across the country as biscuits in particular are quiet commonly consumed. Some of the major consumer groups of note include:

- **Children and families.** Biscuits are a popular tasty snack among children and families often purchase them for convenient and tasty treats. Biscuits with fun or unique shapes, colours and flavours further appeal to children. Cereal bars are also often purchased by parents looking for convenient and nutritious snack for their children. Bars with child-friendly flavours and nutritional benefits are further popular.
- **Young adults and students.** Young adult and students often seek quick and convenient snacks to fit their busy lifestyles; portable biscuit packs that can easily be carried to work or school are popular amongst this demographic. College students and young adults also may opt for cereal bars as a convenient and portable snack.
- **Urban professionals.** Busy urban professionals may opt for biscuits as a convenient and portable snack between work hours. Single-serving packs and biscuits with added nutritional benefits appeal to this group. Urban professionals further may opt for nutritional cereal bar products, particularly high protein cereal bar products for urban professional who enjoy fitness activities.

Other major consumer groups to highlight include: health-conscious consumers; vegans and vegetarians; and fitness enthusiasts. The main consumer group for imported EU biscuit or cereal bar products will likely be the higher income subsets of the above groups.

## Drivers and method of consumption

Convenience and portability are the biggest drivers of biscuit and cereal bar products making them an ideal on-the-go consumption product. The ease of carrying and consuming biscuits

and cereal bar products without the need for additional utensils drives their popularity. The wide range of biscuit and cereal bar flavours from sweet to savoury and the diverse textures include crispy, soft, and filled varieties further cater to different tastes preferences which drives consumers interest and consumption. Biscuits, and to a slight lesser degree cereal bar products are perceived to be budget-friendly snacks, making them accessible to a broad consumer base. The affordability of biscuits contributes to their widespread consumption across socio-economic groups. The rise of health and wellness in Brazil across the consumer market drives sales for cereal bar products in particular as many cereal bar products are marketed with attributes such as high fibre, whole grain, and reduced sugar. Cereal bar products often incorporate ingredients that offer nutritional benefits which includes nuts, seeds and superfoods for added protein, vitamins and mineral.

Biscuits are commonly consumed on their own as a standalone snack. This method of consumption is common during breaks at work, while studying or simply as a quick indulgence product. Dipping into hot beverages and pairing biscuits with other snacks such as cheese and spreads is also quite common in Brazil, as it is in Europe.

Cereal bar products are mainly consumed on-the-go as a quick portable snack or as a meal replacement as cereal bar products with a balanced nutrient profile may serve as a quick substitute for a traditional meal. Cereal bars marketed as energy or performance bars are often consumed before or after physical workouts as a quick source of energy and nutrients.

### Purchase criteria

Flavour varieties play a key role in the purchasing criterion of consumers in Brazil as consumers appreciate a wide variety of flavours in biscuits and cereal bar products ranging from traditional options like chocolate and vanilla to more unique or regionalised flavours. There is also a growing trend towards healthier snacks and consumers may look for biscuits and cereal bar products that align with their dietary preferences, such as those with whole grain, reduced sugar, or gluten-free options. Well-known or established brands often are also particularly sought out by Brazilian consumers although price point is often the key deciding factor in purchasing decisions, biscuit and cereal bar products that offer a good balance between quality and price are likely to attract a broader amount of the consumer base. Consumers of imported EU biscuit or cereal bar products will have heightened expectations behind most of these purchasing criteria, particularly with regards to taste and brand recognition.

### Recent market trends

There have been a several key recent market trends in the Brazilian biscuits and cereal bar market in recent years which include.

- **Inflation continues to impact the market.** Inflation continues to affect the sweet biscuits market as well as the wider market for staple products which is due partly to the rise in the costs of energy prices in recent years which has further impacted the cost of production in Brazil. Plain biscuits have been appealing to price-conscious customers because they were frequently discounted and available in large, value-for-money packets suitable for home consumption. Products from other countries, such as Germany, Italy, and Portugal, gained popularity among consumers after the government reduced import tariffs on certain food staples, including sweet biscuits, in 2022 in an effort to combat inflation.
- **Health and wellness trend.** In recent years, one of the most notable trends in the wider packaged food market was an increased emphasis on incorporating functional ingredients into product formulations. As people have become more health-conscious, the demand for food with a high nutritional content has risen,

forcing manufacturers to be more careful in their considerations regarding which beneficial ingredients will be used in their products. As this trend gains traction, what was once a distinguishing feature for products is becoming a must-have. Consumers now expect wellness-promoting ingredients to be included in product formulations, establishing a new industry standard. To remain competitive and meet customer demands, manufacturers increasingly prioritize R&D to identify and incorporate functional ingredients that are appealing.

### 5.13.3 Offer

#### Domestic production

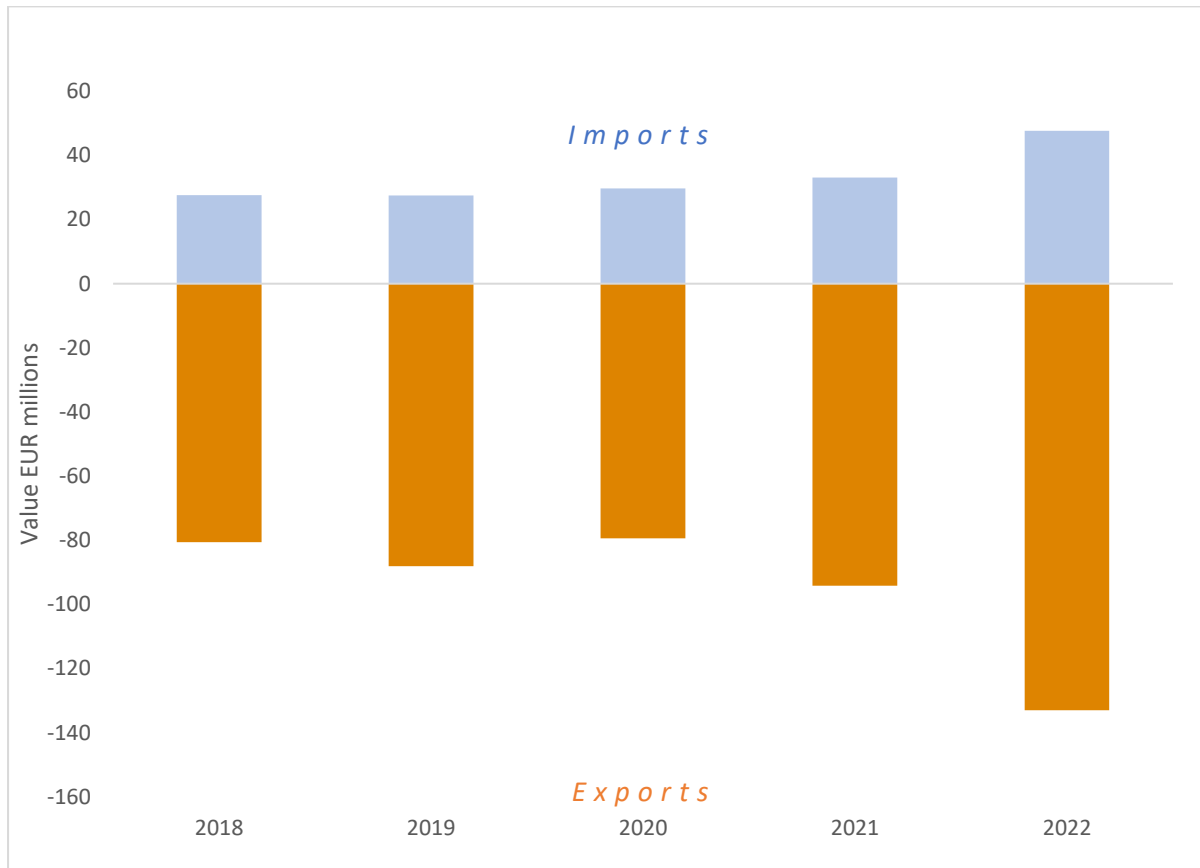
Biscuit and cereal bar production is well-established within the Brazilian food industry and is spread across various regions of the country (with notable concentration within areas with strong food processing such as the southern states of Brazil and within the vicinity of major urban centres such as Rio de Janeiro, Sao Paulo and Brasilia). The largest company by brand share of the market is M Dias Branco SA Industria & Comercio de Alimentos (just under 15% share of the market), followed by Nestle Brasil Ltda and Pandurata Alimentos Ltda (each just under 10% share of the market). The rest of the market is made up of numerous domestic and multinational producers.

#### Imports and exports

Figure 5-54 shows that Brazil has evolved in recent years to expand its status as a net exporter of biscuits and cereal bars in recent years with the country exporting a total of EUR 132 million in 2022. Despite total exports rising in recent years, total imports continued to also grow with total imports coming to a value of EUR 47 million in 2022 up from a total value of EUR 27 million in 2018.



**Figure 5-54: Trade balance (imports and exports) of biscuits, waffles and wafers in Brazil, 2018-22 value EUR millions**

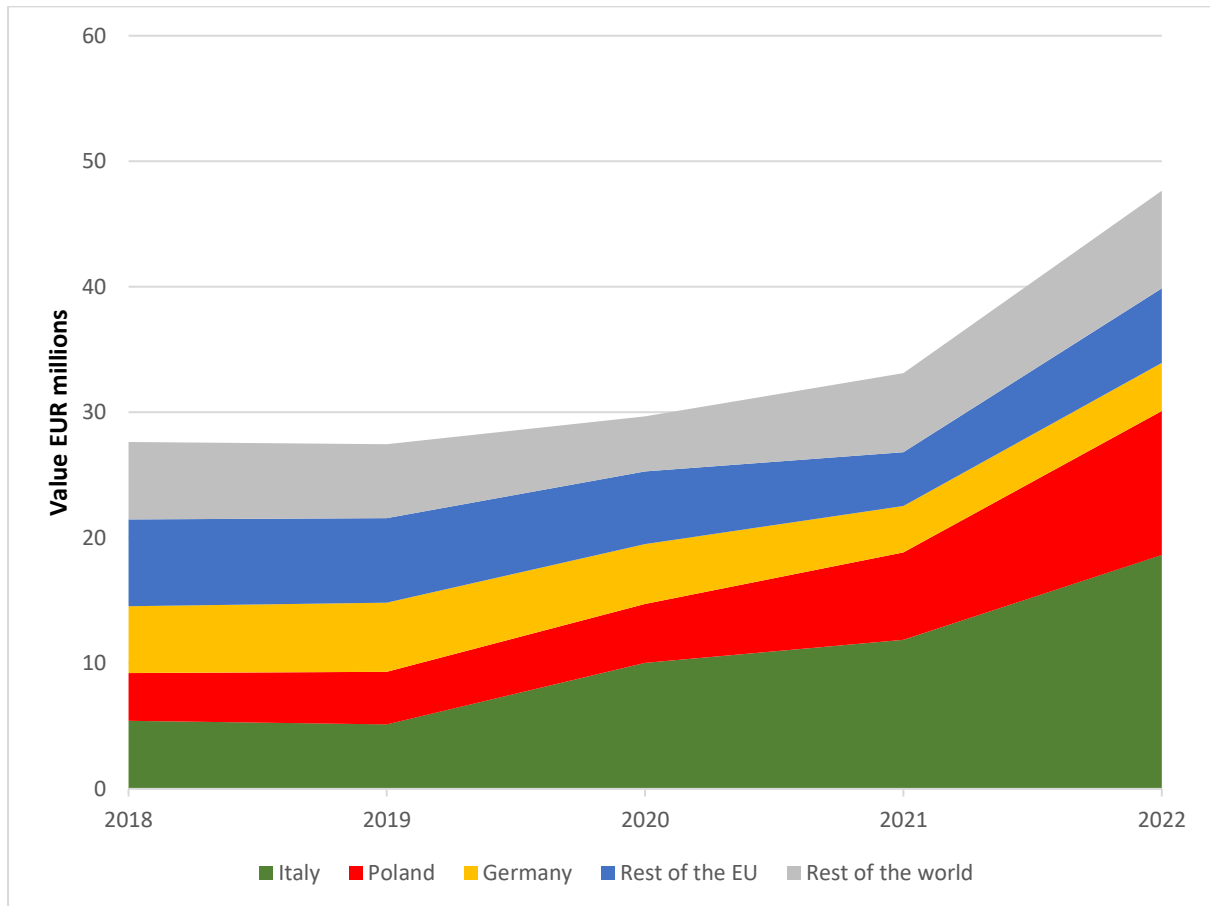


Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN codes 190531 and 190532.

In terms of origin, Italy is the largest exporter of biscuit and cereal bar products to a total value of EUR 18 million (30% of imports) in 2022, the second largest exporter was Poland to a value of EUR 11 million (19% of imports) and the third largest exporter was Germany to a value of EUR 3.8 million (6.2% share of the market). The rest of the EU accounted for a total export value of EUR 5.9 million (9.6% share of the market - see Figure 5-55).

**Figure 5-55: Brazilian imports of biscuits, waffles and wafers by country, 2018-22; Value EUR millions**



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN codes 190531 and 190532.

### EU GI products

As noted in section 4.2.4, there is a register of protected GIs. No relevant GIs for EU biscuits were identified.

### Main competitors

Overall, the largest competitor for EU biscuit and cereal bar products come firstly from domestic producers who cater to a large extend the total demand within the domestic market. Exports from Argentina, Russia and Thailand provide limited competition although total exports from these markets are limited compared to the EU.

## 5.13.4 Specific market entry requirements

### Market access and entry

The customs procedures for importing foodstuffs are set out in section 4.2.1. A full list of the general documentary requirements for export set out in Table 4-1, along with requirements by product category in Table 4-2. A non-automatic import licence may be required for biscuits and cereal bars.

In terms of tariffs, biscuits and cereal bars faces an ad valorem tariff of 14.4%.

**information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:**

**Main page – select product, country of origin and destination country:**

<https://trade.ec.europa.eu/access-to-markets/en/home>

**Example link – general bakers' wares (1905) from Denmark to Brazil**

<https://trade.ec.europa.eu/access-to-markets/en/search?product=1905&origin=DK&destination=BR>

### Standards, SPS measures

[RDC 711/2022](#), which includes sanitary requirements for various types of cereal based products is the key standard of relevance for biscuits and cereal bars.

### Labelling

Biscuits and cereal bars must conform to the labelling requirements for packaged foods set out in section 4.2.3.

## 5.13.5 Distribution

The distribution of biscuits and of snack bars relies mainly on modern grocery retailers; more specifically, supermarkets Figure 5-56. Supermarkets and hypermarkets each account for a share of 29% of total distribution. Small local grocers' distribution came to a total distribution of 25.1% of share, non-grocery retailers accounted for 4.4% of sales.

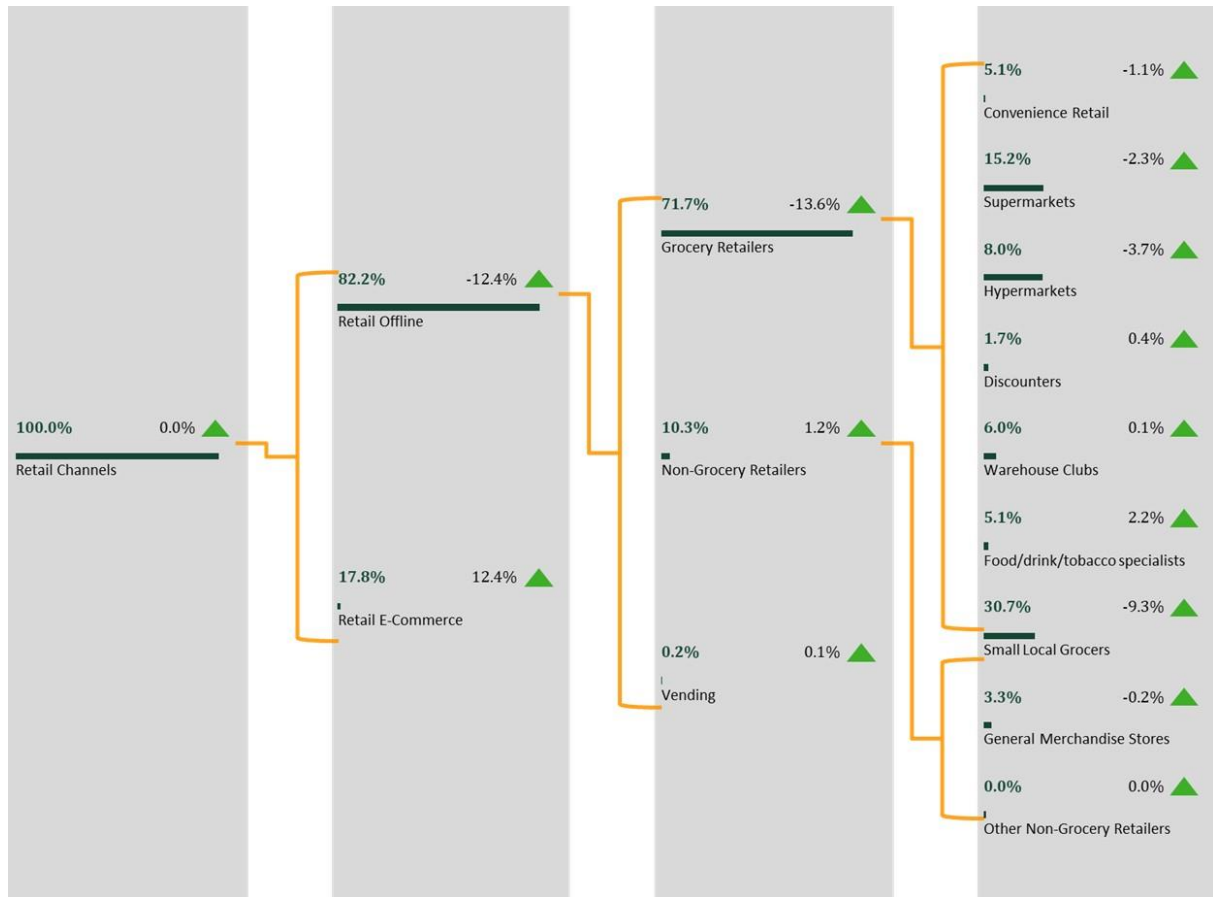
Figure 5-56: Distribution channel overview of sweet biscuits in Brazil (2023); retail value



Source: Euromonitor International: Packaged Food, 2023.

As can be seen in Figure 5-57, grocery retailers are the main distribution channel with small local grocers being the largest distributor to a share of 30.7% of the market. Supermarkets accounted for 15.2% of total distribution followed by hypermarkets which accounted for 8% of the market. Retail e-commerce accounted for 17.8% of total sales are the sale of cereal bars represents one of the premier channels of distribution in which e-commerce has a major presence.

**Figure 5-57: Distribution channel overview of snack bars (including cereal bars) in the Brazil (2023); retail value**



Source: Euromonitor International: Packaged Food, 2023.

### 5.13.6 Challenges for EU products

Despite tariff cuts on certain biscuit and cereal bar products exported from the EU in recent years, the current rate of 14.4% still applies and provides a challenge for EU exporters as this tariff rates moves to further price EU biscuit and cereal bar products away from lower middle income and lower income earners, resulting in the market for EU biscuit and cereal bar products being largely concentrated within upper-income and higher income earners. Other key challenges include compliance with the Brazilian labelling regulations in view of the possibility of products being caught by front of pack labelling requirements. The standard logistical costs of operating and exporting to the Brazilian market for biscuit and cereal bar products is also a considerable operational challenge.

### **Market Takeaway: Biscuits and cereal bars**

**Consumption:** *Biscuits and cereal bar consumption is growing in Brazil and appeals to most of the wider consumer base, with upper-middle- and higher-income earners more likely to consider imported products.*

**Competition:** *Domestic production is high and sustains most of the market demand in Brazil; there is limited competition from Argentina, Russia and Thailand although total exports from these countries lag behind major EU producers.*

**Distribution:** *Biscuits predominantly sold through store-based retailers with supermarkets and hypermarket accounting for the majority of sales. Internet retail of increasing importance for biscuits and dominant for cereal bars.*

**Challenges:** *Facing a 14.4% tariff rate coupled with the presence of domestic products and the logistical challenges of exporting to Brazil.*

**Opportunities:** *Rising health and wellness trend coupled with rising curiosity amongst consumers (particularly younger consumers) about biscuit and cereal bar products produced abroad.*



## 5.14 Jams

### 5.14.1 SWOT analysis

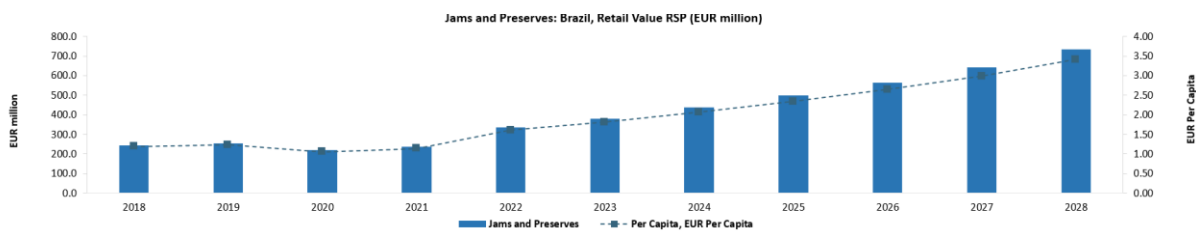
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> <li>The <b>jam</b> market is <b>forecast to grow</b> strongly in the coming years.</li> <li>Jam <b>imports have been increasing</b> in the last few years since the Covid-19 pandemic.</li> <li>The <b>EU</b> in total accounted for over <b>30% of all jam imports</b> to Brazil in 2022.</li> </ul>	<ul style="list-style-type: none"> <li><b>Brazil is a large domestic producer</b> of jams as it is a large producer of the needed ingredients (sugar and fruit).</li> <li><b>Domestic jam tends to be cheaper</b> than jam from the EU.</li> <li>Brazil is a <b>net exporter</b> of jams.</li> </ul>
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> <li>The most <b>popular flavours</b> are <b>strawberry, blackberry, and raspberry</b>. Jams with regional flavours are on the rise.</li> <li><b>Healthy, sugar reduced jams, or jams with added value</b> are in demand due to rising health consciousness of consumers.</li> </ul>	<ul style="list-style-type: none"> <li><b>Domestic brands</b> dominate the market (such as Kivics Markmav, Ritter Alimentos, and Predilecta Alimentos).</li> <li>Brazil's neighbour <b>Argentina</b> is the main exporter of jams to Brazil.</li> </ul>

### 5.14.2 Consumption

#### Evolution of consumption

Figure 5-59 shows that jams and preserves had a total market size of EUR 381 million in 2023. Historically between 2018 and 2023 the market declined with a negative CAGR of -9.2%. However, in the years to come (between 2023 and 2028) the market is forecast to strongly grow with a CAGR of 14%. With this growth it should reach a total market size of EUR 734 in 2028.

**Figure 5-58: Evolution and forecast of the market for jams and preserves in Brazil, 2018-2028; EUR million**



Source: Euromonitor International: Packaged Food, 2023.

#### Consumers

Fruit jams stand out as the most popular sweet spread in Brazil. Consumers encompass diverse demographic groups and lifestyles. Families often purchase fruit jam as a staple pantry item for breakfast or snack time. Children enjoy jam as a sweet addition to their meals or snacks. Additionally, health-conscious consumers may opt for fruit jam made with natural ingredients or reduced sugar content as part of a balanced diet. Urban consumers with busy lifestyles may appreciate the convenience of ready-to-use jam for quick meals or snacks.

#### Drivers and method of consumption

Despite challenges posed by the Covid-19 pandemic, inflation, currency devaluation, and supply chain disruptions, players in the jam market in Brazil have focused on adapting to these difficult conditions. Throughout 2022, efforts were concentrated on launching new products,

expanding product lines, and implementing marketing campaigns to strengthen flagship brands.

Another driver has been the increased availability of private label and small brands, which offer greater variety and options in the market; and in the case of the former, affordable products.

Jams are commonly used for breakfast, spread on bread or toast, and jams also serve as a versatile ingredient in various desserts and snacks. Consumers appreciate the wide variety of fruit flavours available, ranging from traditional options like strawberry and guava to more exotic choices such as passion fruit. Additionally, jams are often used in homemade cakes, pastries, and other confections.

### **Purchase criteria**

Brazilian consumers have specific criteria when choosing jam. Quality is important, with jams made from fresh, natural fruits without artificial additives are often favoured. Flavour is important as well, with strawberry being consumer's favourite. This is followed by a variety of other flavours including blackberry, raspberry, blueberry, guava, orange, pepper, peach and then grape. Price is a significant factor, with consumers seeking options that offer good value for money. Packaging matters too, with consumers favouring convenient and visually appealing packaging. Health-conscious consumers may prioritise jams with reduced sugar content or organic ingredients.

### **Recent market trends**

Recent trends in the jam market reflect a growing emphasis on variety, health-consciousness, added benefits, co-branding, and regional flavours. Private label and small brands have expanded their presence in the market, offering consumers a wider range of options. The market leader offers a diverse portfolio, including 100% fruit jam, diet options, and a gourmet line, with investments in new formats and presentations to cater to different consumption occasions. Consumers are increasingly drawn to jams with added nutritional value, as they seek both indulgence and health benefits. Producers are responding by introducing formulations enriched with vitamins and specific nutrients. Co-branding strategies are also on the rise, with strong brands collaborating to create unique products. Moreover, there is a growing recognition of regional flavours as an identity strategy, with brands exploring ways to connect with consumers through effective communication and engagement.

## **5.14.3 Offer**

### **Domestic production**

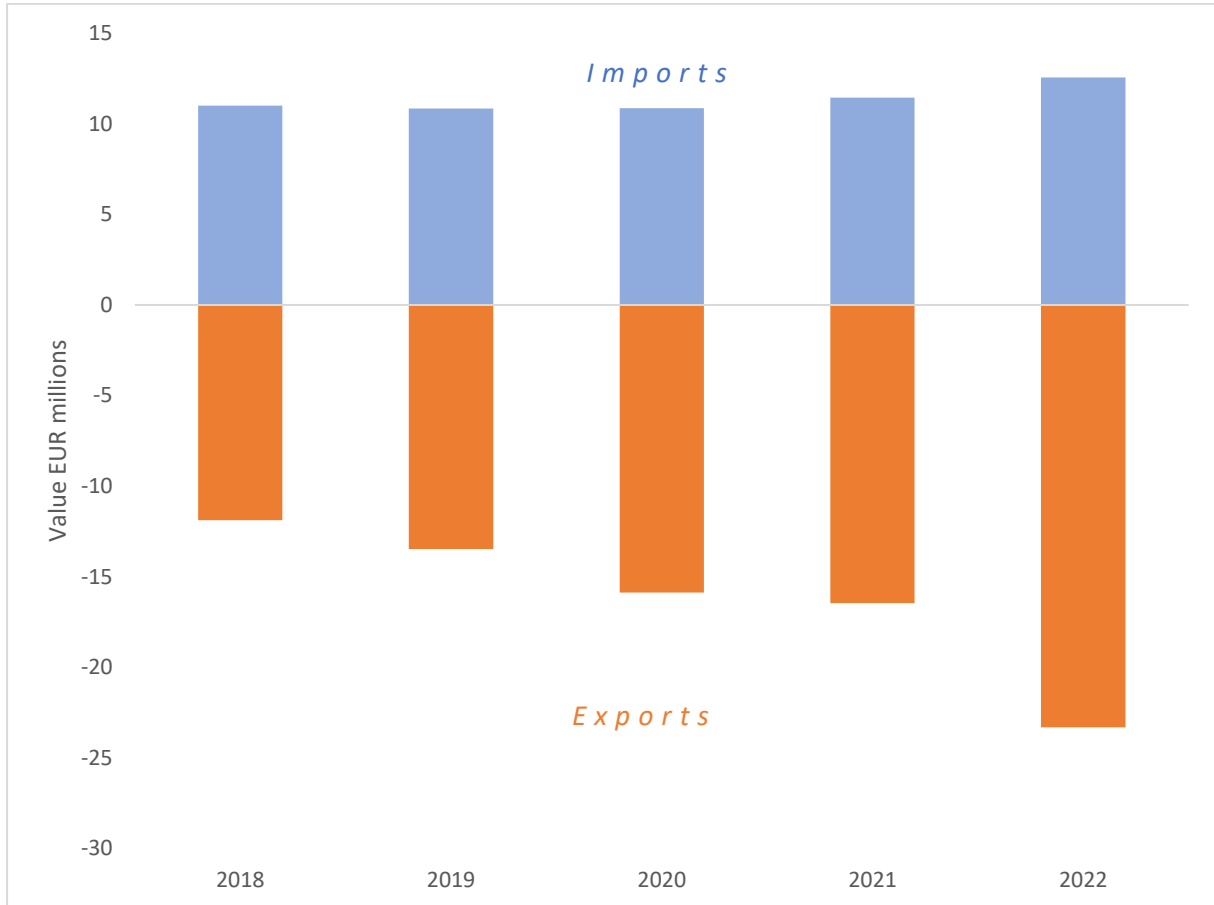
Brazil is a large producer of fruit, and the country is the world's largest sugar producer. As jam ingredients are available domestically, it makes Brazil well-positioned for jam production. This is evident in the prevalence of domestic brands in the Brazilian market. The market is quite fragmented. Around 600 companies operate in the Brazilian jam market, and around four-fifths of them are classified as micro or small businesses. However, three domestic companies are the market leaders. Kivics Markmav ranks first with a market share of close to 10% mainly due to its Queensberry brand. This is followed by Ritter Alimentos with a share of over 5%, and then by Predilecta Alimentos with its Predilecta brand with close to 3%.

### **Imports and exports**

Figure 5-60 shows that Brazil is a net exporter of fruit jams. The country exported a total value of EUR 23 million in 2022, whereas it imported close to EUR 13 million. Exports increased

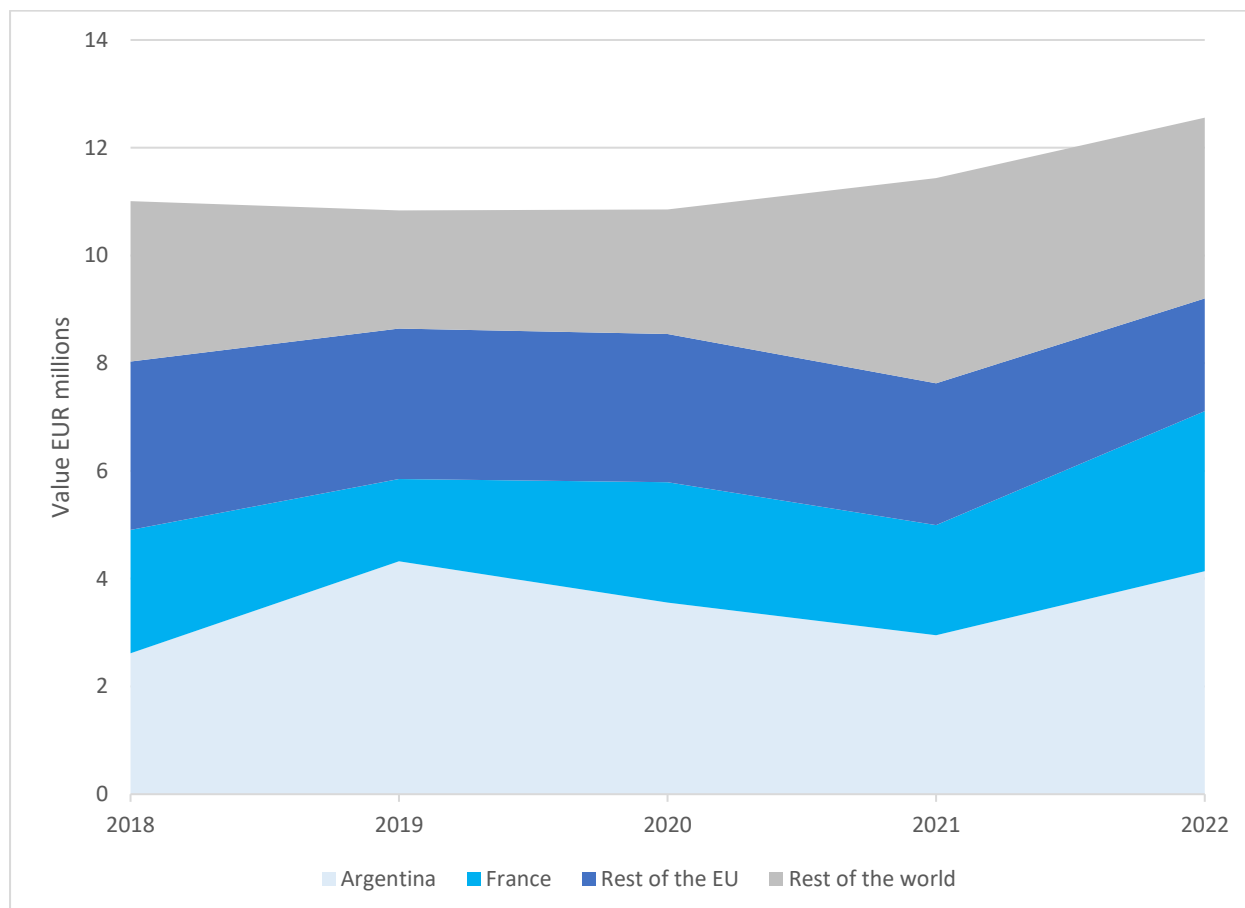
year on year between 2018 and 2022, whereas imports decreased after 2018 and then stagnated in 2019 and 2020. However, since 2021 imports have been increasing again.

**Figure 5-59: Trade balance (imports and exports) of fruit jams in Brazil, 2018-22; value EUR millions**



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>  
Data for CN codes 2007

The origin of jams imported by Brazil is shown below in Figure 5-60 with Argentina being the largest exporter of jams at a value of EUR 4 million in 2022. This is followed by France which is the second largest exporter of jams with close to EUR 3 million. The EU in total accounted for over 30% of all exports to Brazil in 2022.

**Figure 5-60: Brazilian imports of fruit jams by country, 2018-22; value EUR millions**

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>  
Data for CN codes 2007

### EU GI products

As noted in section 4.2.4, there is a register of protected GIs. No relevant GIs for EU jam were identified.

### Main competitors

Jam faces competition from other sweet treats like chocolate spreads and honey. Domestically produced jam poses the greatest competition, given Brazil's significant sugar and fruit production, with the country also being a net exporter of jam. Despite the market's fragmentation, domestic companies lead the way, highlighting the popularity of local products. In terms of jam exports to Brazil, its neighbour Argentina is the primary competitor to EU exporters.

## 5.14.4 Specific market entry requirements

### Market access and entry

The customs procedures for importing foodstuffs are set out in section 4.2.1. A full list of the general documentary requirements for export set out in Table 4-1, along with requirements by product category in Table 4-2. A non-automatic import licence may be required for jams.

In terms of tariffs, jams generally faces ad valorem 11.2%.

information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:  
**Main page – select product, country of origin and destination country:**  
<https://trade.ec.europa.eu/access-to-markets/en/home>  
**Example link – general jams category (2007) from France to Brazil**  
<https://trade.ec.europa.eu/access-to-markets/en/search?product=2007&origin=FR&destination=BR>

**Labelling**

Jams must conform to the labelling requirements for packaged foods set out in section 4.2.3.

**5.14.5 Distribution**

Figure 5-61 shows that the largest channel of distribution for the sale of sweet spreads in Brazil are grocery retailers which accounted for 98.8% of all sweet spreads sales in the Brazilian market. This is further broken down to show that supermarkets account for 44.3% of the sales, small local grocers for 25.0% and hypermarkets for 21.7%. The popularity of warehouse clubs and small local grocers has been increasing in recent years. The e-commerce channel remains rather insignificant but is growing as well.

The significance of cash and carry is rising. Notably due to inflation, Brazilians seek competitive prices. As a result, some prioritise bulk purchases at these outlets to capitalise on discounts. Brazilian cash and carry, resembling warehouse clubs or "atacarejo" (a mix of cash and carry and retail) gain importance.

**Figure 5-61: Distribution channel overview of sweet spreads in Brazil (2023); retail value**



Source: Euromonitor International: Packaged Food, 2023.

### 5.14.6 Challenges for EU products

Key challenges for EU jams in the Brazilian market include the strong domestic production of these products, with Brazil being a net exporter of jams as well. As Brazil grows a large variety of fruits, domestic jams also offer this variety in flavour. In addition, domestic jams tend to be more economical than imported jams from the EU. The market is currently fragmented which offers opportunities, however the market leaders are all domestic players. Geographically close countries, such as Argentina, are culturally closer and thus might have it easier to offer better suited products.

#### Market Takeaway: Jams

**Consumption:** Jams and preserves had a total market size of EUR 381 million in 2023. The market declined in recent years but is forecast to grow strongly in the coming years.

**Competition:** Local production is the main competition since Brazil is a strong producer of sugar and vegetables it also is a strong jam producer. In addition, the country is a net exporter of jams. The main exporter of jams to Brazil is Argentina.

**Distribution:** Nearly all distributed through grocery retail outlets, mainly through supermarkets, small local grocers and hypermarkets.

**Challenges:** To combat local production and local brands, to offer competitive pricing, and products that are in line with Brazilian consumers demands.

**Opportunities:** Most popular flavours are strawberry, blackberry, raspberry; healthy sugar reduced jams or jams with added value; jams with regional flavours.



## 5.15 Baby food

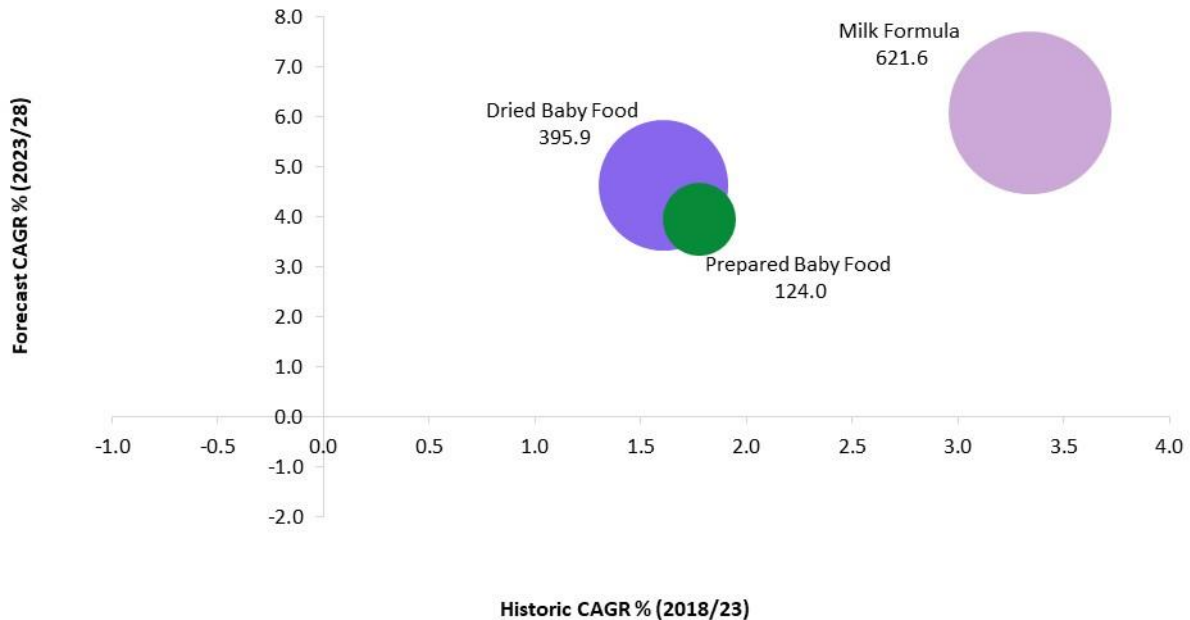
### 5.15.1 SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> <li>▪ Mothers generally have limited maternity leave and hence frequently <b>look for alternatives to breast feeding.</b></li> <li>▪ <b>History / acceptance of the use of baby food, and the milk formula market is growing</b> well despite headwinds.</li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Low and falling birth rate</b> creates a long term headwind.</li> <li>▪ The market at present is <b>largely limited to mid and higher income</b> consumers, and hence limited in size.</li> </ul>
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> <li>▪ Emerging interest in <b>vegetarian / flexitarian</b> options, including in the case of formula milk.</li> <li>▪ Potential tax changes may <b>open the market up to a new, lower income consumer group.</b></li> </ul>	<ul style="list-style-type: none"> <li>▪ Brazil has flipped from being a net importer to a <b>net exporter, and the main players are now well entrenched.</b></li> <li>▪ Following on from the above, <b>the largest three players control almost 90% of the market,</b> leaving limited space for other products.</li> </ul>

### 5.15.2 Consumption

#### Evolution of consumption

As shown below in Figure 5-62, milk formula is the largest segment of the baby food market, with a 2023 value of EUR 622m. It is also the fastest growing, with a historical growth rate over the last five years of 3.3% and forecast growth rate over the period to 2028 of just over 6%. Dried baby food is the second largest segment at EUR 396m; and prepared baby food the smallest at EUR 124m. Both these segments have historical growth rates of just under 2% per year, and forecast growth rates over the period to 2028 of around 4% per year.

**Figure 5-62: Evolution and forecast of the baby food market in Brazil, 2023-28; retail value EUR million**

Source: Euromonitor International: Packaged food, 2023.

## Consumers

The fertility rate in Brazil has been falling over the last twenty years or so, and now is at the level of just over 1.6 – below the replacement level of 2.1. While this creates a headwind for the baby food market, there are other tailwinds which have helped support the recent growth of the market. Only 40% of babies up to the age of 6 months are exclusively breastfed, leaving a some 60% which use other sources of milk to some extent. A notable reason for the fairly low level of exclusive breastfeeding is the limited statutory maternity leave of 120 days, which results in working mothers migrating to other feeding methods such as formula milk, in order to be able to return smoothly to their working routine. As a result, there is quite a broad consumer group for baby food products; though the price aspect is one which slightly skews the market towards middle income and higher working mothers.

## Drivers and method of consumption

As noted above, the use of formula milk by working mothers in particular is a notable driver of the baby food market. Looking across the age groups, around 1/3 of the infant formula market by value is accounted for by standard infant formula for babies up to 6 months; about 20% is accounted for by follow on formula; and just under 40% by growing up formula (with the remainder special baby formula).

The prepared and dried baby food segments are driven more by convenience. Since the Covid 19 pandemic, parents have been particularly focused on the best feeding methods for babies, and this has led to the increased use of home-made foods for introducing babies to solids; limiting the market for prepared and dried baby food to more convenience-driven occasions. The slower growth of the segment reflects the headwinds it faces.

### Purchase criteria

Brand, perceived safety / healthiness and price are key purchase criteria. The Brazilian baby food market is dominated by five brands which between them, share over 2/3 of the market (and have done for the past five years). This is a reflection of the strong focus of consumers on products they believe they can trust. In certain regions of the country (such as the north-east), availability is a key factor – there have been recent cases of shortages in such regions, leading to bottlenecks and/or limited choice. While price is consistently a consideration, the recent inflationary pressures have increased the importance of this criterion for many consumers.

Content on digital channels has played a controversial role in purchasing decisions recently, with influencers and public figures impacting the decisions of some of their followers through the sharing of their experience with a certain product. Similarly, the endorsement of certain products by physicians and paediatricians are another rather controversial way in the country that consumer decisions have been influenced; it is estimated that around 7 out of 10 paediatricians in Brazil receive some sort of sponsorship from baby food producers. On the flip side, some influencers have effectively countered these trends by discussing home preparation in the context of healthier lifestyles – as seen in the previous sub-section.

### Recent market trends

As noted above, the prepared baby food market has been under pressure of late. This has resulted in the larger manufacturers discontinuing some of their products in these segment, while also pursuing alternative initiatives to maintain connections with their customers. Such initiatives include the provisions of recipe e-books which provide ideas for the preparation of home foods similar to those offered by the producer themselves.

There has been a global increase of interest in vegetarian and flexitarian diets for toddlers; and this trend has reached Brazil, with one large producer recently launching a “dairy and plants” blend infant formula, based on the combination of non-GMO soy protein, other plants, and dairy protein. Initial signs are that other producers may follow suit over the coming years.

Finally, there are ongoing discussions regarding the taxation of formula milk, with some considerations being given to reducing/removing taxation on formula milk in order to increase access to the category for poor families that need breast milk substitute. If ultimately passed, this could effectively increase the range of consumers who use the product.<sup>77</sup>

## 5.15.3 Offer

### Domestic production

Three companies - Nestlé Brasil, Laticínios Bela Vista and Danone – control close to 90% of the Brazilian baby food market. The largest of these, multinational Nestlé, holds a market share of just under 60% and has long standing production operations in Brazil. Laticínios Bela Vista (Piracanjuba) is a domestic Brazilian company with production sites across the country. Danone also has a factory site for baby food in Minas Gerais. After these top three, there are three multinationals with low single digit market shares, and a range of smaller, primarily domestic producers.

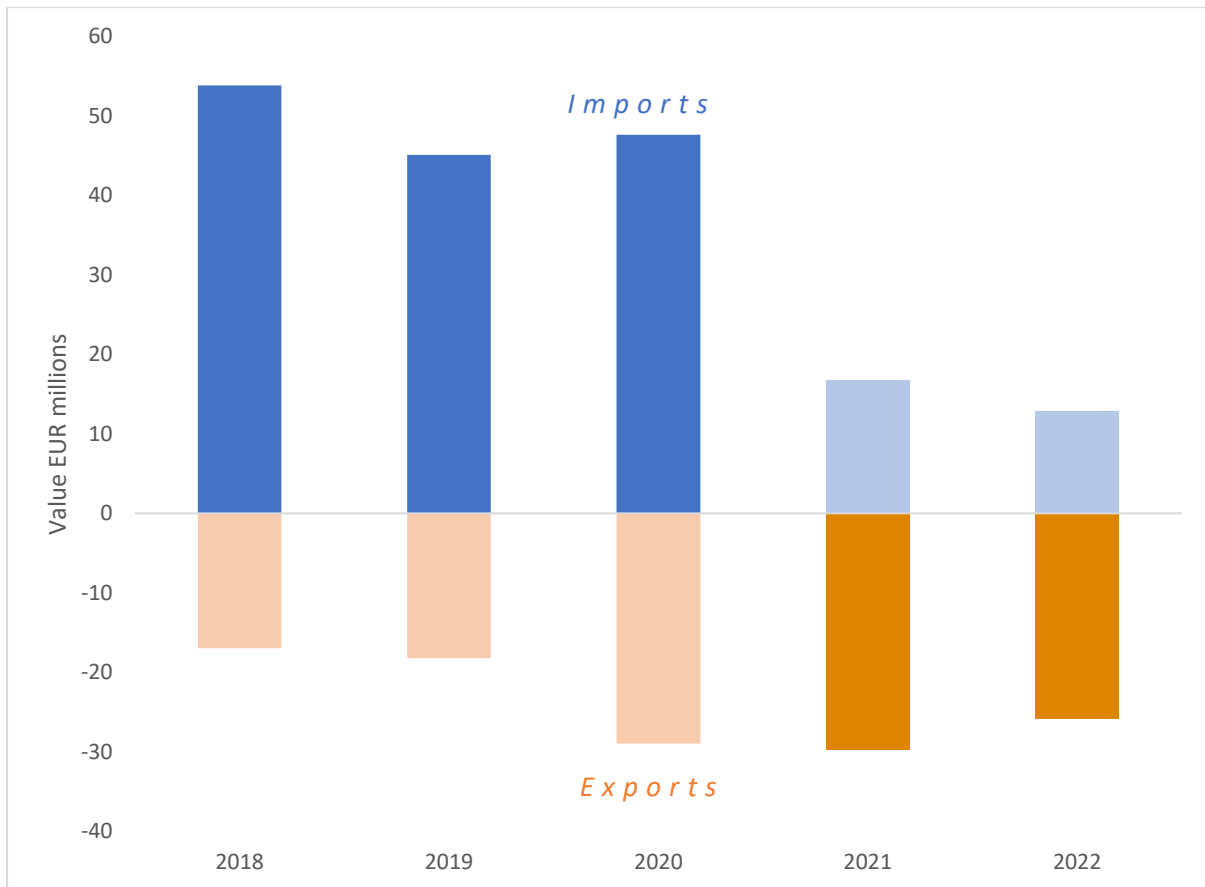
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<sup>77</sup> Euromonitor International: Packaged food, 2023; <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC7457464/>; <https://www.aliveandthrive.org/en/country-stat/brazil>

## Imports and exports

As shown below in Figure 5-63, Brazil has transitioned from being a net importer of baby food (2018-20) to a net exporter (2021-22). Imports have fallen sharply over this period, from EUR 53.8m in 2018 to EUR 12.9m in 2022. Exports in contrast have increased slightly, from EUR 17m in 2018 to EUR 25.9m in 2022.

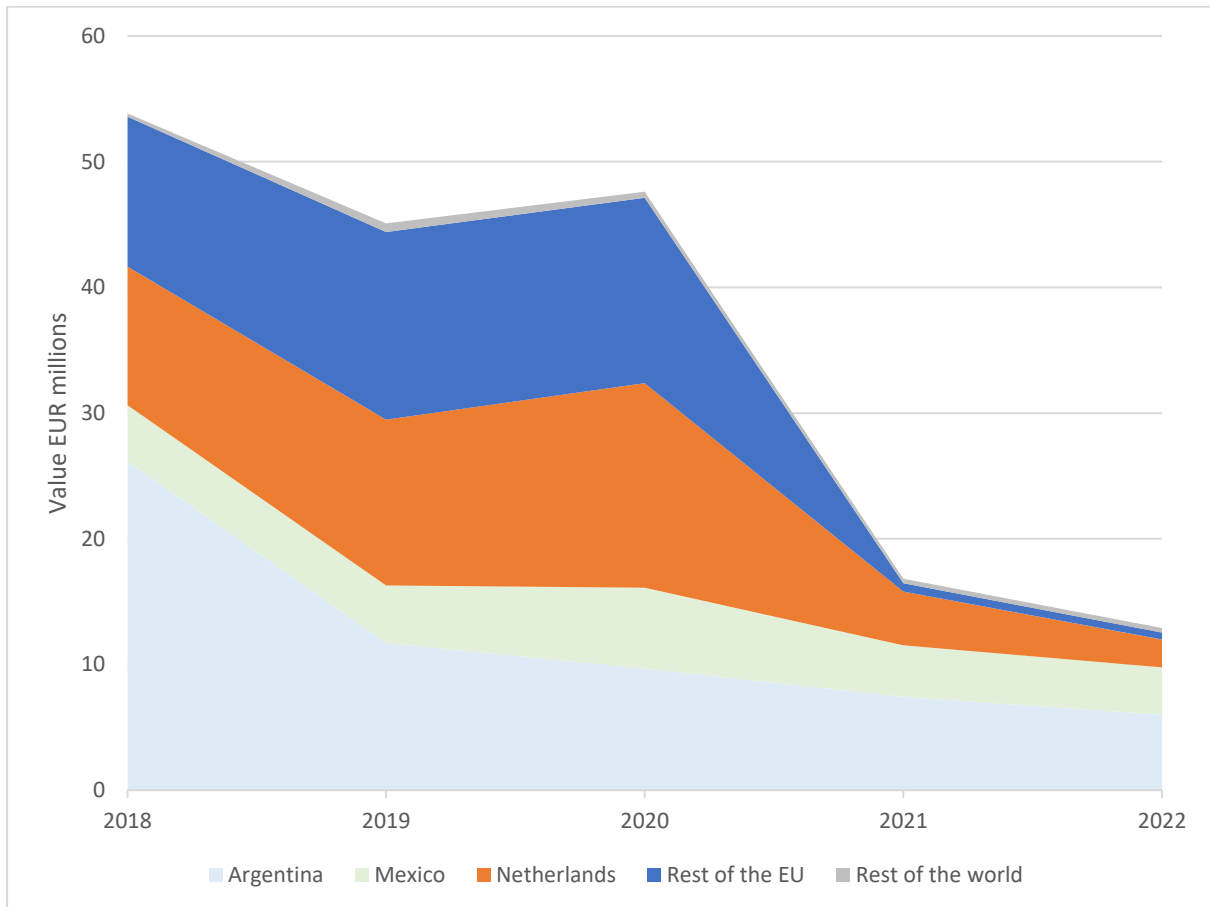
**Figure 5-63: Trade balance (imports and exports) of baby food in Brazil, 2018-2022; value EUR millions**



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 190110

Figure 5-64 shows that Argentina is the largest origin of imports; it accounts for around EUR 6m of imports (almost half of the 2022 total). Mexico is the second largest origin and EUR 3.7m and the Netherlands third at EUR 2.2m. Exports from the Netherlands have fallen sharply over the last five years, from EUR 11m in 2018. The rest of the EU accounts for just over 0.5m of exports; with Germany accounting for the entirety of the figure in 2022 (in previous years, it was split between Germany and Ireland).

**Figure 5-64: Brazilian imports of baby food by country, 2018-22; value EUR millions**

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 190110.

### Main competitors

Brazil has transitioned from being a net importer of baby food to a net exporter. Against this background, competition primarily comes from domestic production, which in turn is largely controlled by three companies: Nestlé Brasil, Laticínios Bela Vista and Danone.

## 5.15.4 Specific market entry requirements

### Market access and entry

The customs procedures for importing foodstuffs are set out in section 4.2.1. A full list of the general documentary requirements for export set out in Table 4-1, along with requirements by product category in Table 4-2. It should be noted that there is a registration requirement for baby food.

In terms of tariffs, baby food generally faces ad valorem tariffs of 14.4%.

**Information on import duties and Rules of Origin and customs procedures can be consulted on the European Commission website:**

**Main page – select product, country of origin and destination country:**

<https://trade.ec.europa.eu/access-to-markets/en/home>

**Example link – Preparations suitable for infants or young children category (190110) from France to Brazil**

<https://trade.ec.europa.eu/access-to-markets/en/search?product=230910&origin=FR&destination=BR>

**Standards, SPS measures and labelling**

There are multiple relevant standards for baby food. These include:

- Portaria SVS/MS 34/1998 on transition foods for infants / young children
- Portaria SVS/MS 36/1998 on cereal based food for infants
- RDC 42/2011 on nutrient compounds for infant foods
- RDC 43//2011 on infant formula
- RDC 44/2011 on follow on formula
- RDC 45/2011 on certain specific infant formulas

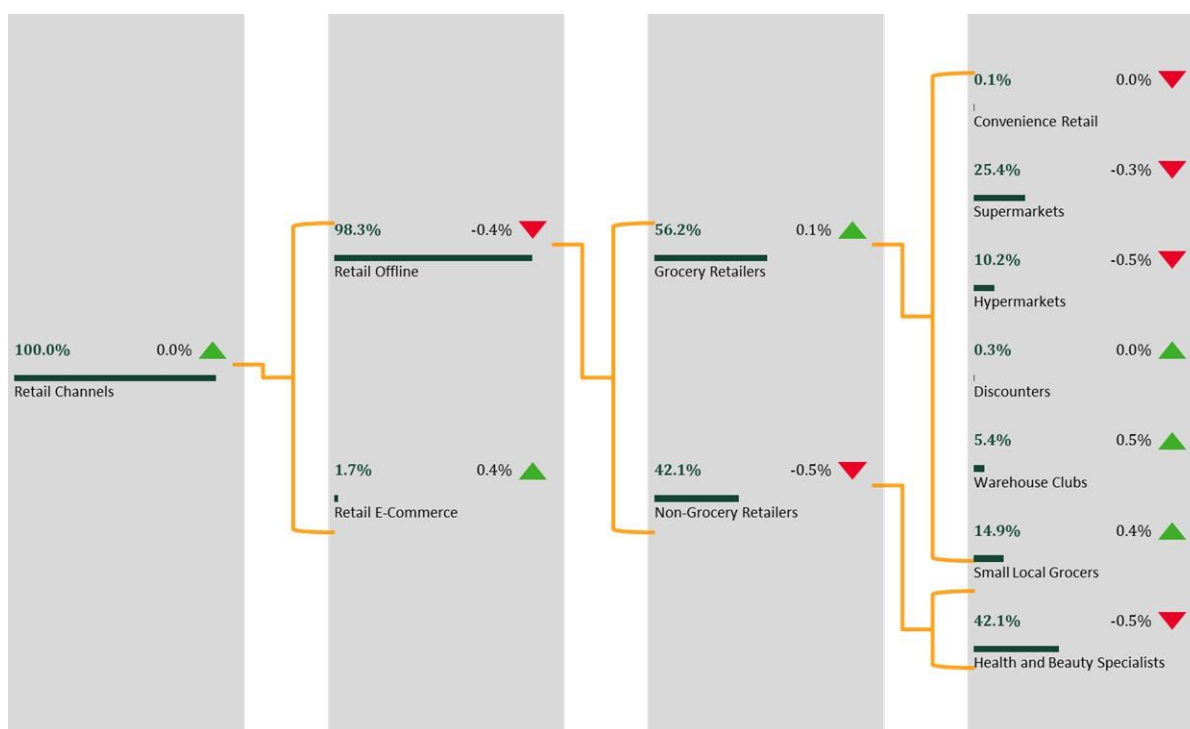
**Labelling**

Baby food must conform to the labelling requirements for packaged foods set out in section 4.2.3.

**5.15.5 Distribution**

As shown below in Figure 5-65, health and beauty specialists lead the distribution of baby food in Brazil, with a share of 42%. They are followed by various types of grocery retailers: supermarkets (25%), small local grocers (15%), hypermarkets (10%) and warehouse clubs (5%). E-commerce now accounts for 1.7% of sales.

**Figure 5-65: Distribution channel overview of baby food in Brazil (2023); retail value**



Source: Euromonitor International: Packaged food (2023)



### 5.15.6 Challenges for EU products

Competition is a notable challenge. Brazil is now a net exporter of baby food, and the market is controlled by three large companies (two of which are multinationals), leaving limited space for other competitors – particularly given the consistent brand loyalty of many consumers. There is the long-term headwind of a low and falling fertility rate, which effectively means there is a falling total addressable market. That said, there are some factors which temper the headwind to an extent – most notably for infant formula, limited maternity leave is a motivation for many mothers to seek out breast milk alternatives. Prepared baby food on other hand faces increasing headwinds as consumers look at options for healthy home preparation of food. Finally, for financial reasons, the market is more restricted to mid and higher income consumers, though there are ongoing discussions on taxation which could potentially open the market up to a wider range of consumers.

#### Market Takeaway: Baby food

**Consumption:** formula milk the main market. While birth rates are low, limited maternity leave spurs many mothers to consider baby food (formula milk above all).

**Competition:** Brazil is now a net exporter, and three companies control some 90% of the market in value terms.

**Distribution:** health and beauty specialists the most important channel, followed by supermarket and hypermarkets. These three channels combined account for around 80% of distribution.

**Challenges:** tough competitive environment and long term headwinds in the form of a falling birth-rate. Falling interest in prepared baby food products.

**Opportunities:** emerging interest in vegetarian / flexitarian options. Potential tax changes may open the market up to a new, lower income consumer group.

## 6 Communication

### 6.1 Communication strategy

Companies wanting to market products and advertise in Brazil have different channels to consider. The aim of this section is to break down each section of the mass media landscape in Brazil and introduce the main communication channels (new and traditional media, as well as fairs) available in the country, as well as provide a brief overview of key regulations for the advertisement of food and beverages.

#### 6.1.1 Online & digital media

In Brazil, online and digital marketing have become increasingly essential for companies looking to promote their products. Based on 2023 data, there are over 134 million internet users in the country, representing 81.3% of total population and with mobile penetration reaching 284.2 million phones, making this number 5 in worldwide rankings.

Furthermore, there were a total of close to 221 million active cellular mobile connections in 2023, surpassing the total population. This is possible because many individuals worldwide use multiple mobile connections. The number of mobile connections in Brazil grew by 5 million, which is 2.3%, between 2022 and 2023. Regarding internet connection speeds, the median mobile internet speed via cellular networks was recorded at 33.36 Mbps, while the median fixed internet connection speed stood at 97.52 Mbps.

The dominance of digital media is evident, with Brazilian adults spending an average of nine hours and thirty-two minutes per day engaging with digital media, and this trend is expected to continue its upward trajectory.

The Brazilian advertising industry has an important position globally. With the country being the largest economy in Latin America, ad spending in the Digital Advertising market is projected to reach USD 9.5 billion in 2024. A decade ago, digital advertising had a minor role in Brazilian advertising landscape, but now it has become a cornerstone. As the number of online users continues to grow, businesses are heavily investing in digital ads to connect with their target audience. The increase in popularity of influencer marketing is playing a significant role in transforming the advertising landscape.

Digital advertising agencies may provide companies with support to develop a successful digital marketing strategy. The box below shows just an example of a few big and successful digital advertising companies, however, Brazil is a big country with many regional differences, which is why it might also be a good idea to search for more regional advertising companies.

#### **Notable Digital Advertising Agencies in Brazil**

GV8 - <https://www.qv8.com.br/>

Aaron Marketing Consulting - <https://aaronconsulting.com.br/>

Agência Tupiniquim - <https://www.agenciatupiniquim.com.br/>

Convertte - <https://www.convertte.com.br/>

Rock Content - <https://rockcontent.com/>

Camelo Digital - <https://camelo.digital/es/>

Attri - <https://www.attri.com.br/>

Orgânica Digital - <https://www.organicadigital.com/>

## Social media platforms

As of January 2023, Brazil had 152.4 million social media users, accounting for around 70% of the total population. However, it is important to remember that social media users might not necessarily represent unique individuals.

Among total social media users in Brazil 145.7 million were aged 18 and above, making up 89.4% of the total population in that age group. The distribution of social media users in Brazil was characterized by 54.8% being female and 45.2% being male. This highlights some differences in demographic engagement on social platforms across the nation.

Below is a breakdown of different social media platforms.

### Facebook

Facebook has 109 million active users in Brazil, being the 4<sup>th</sup> biggest market, after India, USA and Indonesia.<sup>3</sup> Facebook's ad reach in Brazil was equivalent to 50.5% of the total population at the start of 2023. Breaking down the demographics of Facebook's ad audience in Brazil, 54.3% were female and 45.7% were male, indicating a diverse and balanced representation of users reached through their advertising efforts.

#### Notable Facebook food-orientated channels in Brazil

Mohamad Hindi - <https://www.facebook.com/mohindi/>  
Ana Maria Braga - <https://www.facebook.com/AnaMariaBraga/>  
Rita Lobo - <https://www.facebook.com/RitaLobo0/>  
Bela Gil - <https://www.facebook.com/belaqiloficial>  
Danielle Noce - <https://www.facebook.com/daniellenocenoce/>  
Tastemade Brasil - <https://pt-br.facebook.com/tastemadebr/>  
Palmirinha Onofre - <https://www.facebook.com/vovopalmirinha/>  
Receitas de Pai - <https://www.facebook.com/receitasdepaioficial/>  
Beca Milano - <https://www.facebook.com/becamilano/>  
Henrique Fogaça - <https://www.facebook.com/henriquefogaca74/>

## YouTube

In 2023, YouTube had a user base of 142 million users in Brazil. It is important to stress that these advertising reach figures do not necessarily represent the same thing as monthly active user figures though, and there may be meaningful differences between the size of YouTube's ad audience and its total active user base. However, the company's own data suggests that YouTube's ad reach in early 2023 was equivalent to 65.8% of Brazil's total population at the start of the year. To put those figures in perspective, YouTube ads in 2023 reached 78.1% of Brazil's total internet user base (regardless of age). At that time, 51.9% of YouTube's ad audience in Brazil was female, while 48.1% were male.

### Notable YouTube food-orientated channels in Brazil

Ana Maria Braga - <https://www.youtube.com/@anamariabraga>  
 Culinária em Casa - <https://www.youtube.com/@CulinariaemCasa>  
 Danielle Noce - <https://www.youtube.com/@cozinhabossaemalaqueta>  
 Nhoc GNT Receitas - <https://www.youtube.com/@receitas>  
 Receitas da Cris - <https://www.youtube.com/@receitasdacris>  
 Receitas de Pai - <https://www.youtube.com/@ReceitasdePai>  
 Tastemade Brasil - <https://www.youtube.com/@tastemadebr>  
 Tata Pereira - <https://www.youtube.com/@tatapereira>  
 Tudo Gostoso - <https://www.youtube.com/@tudogostoso>

## Instagram

Instagram had a user base of over 122.9 million individuals in Brazil, with database from December 2023. The biggest group users in Brazil are between 25-34 years old, representing 28.2% of total, limiting platform usage to individuals aged 13 and above. The breakdown of Instagram's ad audience in Brazil revealed that 58% were female, while 42% were male. Data published in Meta's planning tools show that Instagram's potential ad reach in Brazil decreased by 6.0 million (-5.0%) between 2022 and 2023.

### Notable Food Instagram influencers in Brazil

Ana Maria Braga - [@anamariabraqaoficial \(13.8M\)](#)  
 Paola Carosella - [@paolacarosella \(5.1M\)](#)  
 Tasty Demais - [@tastydemais \(4.8M\)](#)  
 Tastemade Brasil - [@tastemadebr \(3.5M\)](#)  
 Beca Milano - [@becamilano \(3M\)](#)  
 Rita Lobo - [@ritalobo \(2.2M\)](#)  
 Receitas de Pai - [@receitasdepai \(1.7M\)](#)  
 Bela Gil - [@belagil \(1.6M\)](#)  
 Palmirinha Onofre - [@vovopalmirinha \(864k\)](#)

## TikTok

In 2023, TikTok's user base in Brazil included more than 82.21 million individuals aged 18 and above. It is important to note that TikTok's advertising tools target users aged 13 and above, but the audience data displayed is limited to users aged 18 and above. Analysing the demographics of TikTok's ad audience in Brazil, approximately 60% were female, while 40% were male, highlighting the platform's appeal to both genders. TikTok's potential ad reach in Brazil increased by 8.1 million (+11%) between the start of 2022 and early 2023.

### Notable TikTok food-orientated channels in Brazil

Debora Gomes - [@deboragomesph](#)  
 Juliana - [@jučenja](#)  
 Laura - [@vegcomcarinho](#)  
 Destemperados - [@destemperados](#)  
 Bia - [@magicardb](#)  
 Marcela Morgon - [@marcelamorgon](#)  
 Malu Regonha - [@maluregonha](#)  
 Saulo Sampaio - [@sausampaio](#)  
 Amor por Receitas - [@amorporreceitas](#)  
 Rony Hall - [@gastromaniaco](#)  
 Virei Adulto - [@vireiadulto](#)  
 Laís Cintra - [@lais.cintra](#)

### Twitter (now X)

As of early 2023, Twitter had a user base of approximately 19 million in Brazil. Twitter's ad reach in the country extended to 18% of the total population during that time. Analysing the demographics of Twitter's ad audience in the US, 34% were female, while 66% were male, showcasing a clear male slant on usage of the platform. The number of Twitter users in Brazil was forecast to continuously increase between 2024 and 2027 by in total 2.2 million users (+11%).

#### Notable Twitter food-orientated channels in the Brazil

Rita Lobo - [@Rita Lobo](#)  
 Fred - [@fred\\_desimpedidos](#)  
 Paola Carosella - [@eussiim](#)  
 Gastronomia - [@GastronomiaSP](#)  
 Henrique Fogaça - [@fogaca\\_henrique](#)  
 Vivi - [@vivecake\\_real](#)  
 André Dias - [@bbqemcasa](#)  
 Claude Troisgros - [@C\\_Troisgros](#)  
 Tastemade Brasil - [@tastemadebr](#)

### Pinterest

Pinterest had user base of close to 34.2 million in Brazil during early 2023.<sup>9</sup> Pinterest's ad reach in Brazil covered 15.7% of the total population at the beginning of the year. Analysing the demographics of Pinterest's ad audience in Brazil, 72.6% were female, while 21.4% were male, reflecting a significant majority of female users engaging with the platform's advertisements.

### Food blogs

Beyond the social media platforms listed above, Brazil does not have other significant blogs that could be considered as an option for advertising. The blog platforms of some of the previously mentioned influencers are provided below.

#### Notable Bloggers in Brazil

Ana Maria Braga - <https://anamariabraga.globo.com/>  
 Blog da Rita - <https://panelinha.com.br/blog/ritalobo>  
 Folha Cozinha Bruta - <https://www1.folha.uol.com.br/blogs/cozinha-bruta/>  
 Cozinha da Matilde - <https://www.cozinhadamatilde.com.br/>  
 Panelaterapia - <https://panelaterapia.com/>

## 6.1.2 Traditional media

The shift in media consumption can be visualised when looking at how adults in the Brazil consume news. As in other countries the shift of news consumption from traditional mediums like print, television, and radio to digital spaces has disrupted the traditional news industry, especially print news. This transformation is visible when looking into how individual Brazil citizens prefer to access their news. About 67% of Brazil adults often or sometimes use social media news. Television still maintains a high level of importance in Brazil; 66% of the population use TV as a source daily, while other sources are used even less frequently, with only about 23% turning to radio and a third to print for news. The primary source of news consumption in Brazil, including websites and social media, is online platforms. A total of 86% of readers use these sources for information.

Younger Brazil citizens exhibit distinctive news consumption habits, with most of them favouring news websites, except for the youngest age group which shows a preference for social media as their primary news source.

In terms of marketing potential, traditional media outlets still have some penetration in the country. However, their reach is shrinking compared to the ever-increasing popularity and influence of digital platforms.

Traditional media's penetration in the country and their potential for marketing purposes are set out below:

- **Print media:** In Brazil, there are no national printed newspapers. The three largest newspapers circulate in São Paulo and Rio de Janeiro, the most populous states in Brazil and all other states have local printed newspapers. In 2022, the circulation of 15 main newspapers fell by 16.1%. The combined average daily circulation of these publications ended 2022 at 394 130 copies. The sum of printed copies in 2022 accounts for only 46.7% of the total from 2018 when the circulation reached 843 231. On digital platforms, profitability was also lower than expected. Among the largest newspapers by circulation are O Globo (Rio de Janeiro), and Folha de São Paulo (São Paulo) with around 300 000 paid subscribers. O Estadão (São Paulo) e Exame, a digital and printed magazine also as a substantial read above 100 000.
- **Television:** Watching TV is a popular leisure activity in Brazil. In 2022, 72% of homes had television and average consumption was around five hours per day; 25% of this time was dedicated to news, 18% to soap operas, 11% to sports programs, and 9% to variety shows. The largest consumers are adults between 35 and 49 years old (24%), followed by seniors aged 65 and above (22%), and young adults between 18 and 24 years old (15%). The Northeast region is the highest consumer of linear TV, comprising 28% of the total, followed by the Southeast (26%), the South (19%), the Midwest (14%), and the North (13%)<sup>12</sup>. Cooking shows are very popular in Brazil, with almost all channels featuring them on their schedules, 'MasterChef' and 'Cozinha Prática' are the two most popular ones. However, streaming has become another option for watching TV as audiences are drawn to the abundance of content available online. At least 65% of Brazilian adults have a streaming service and they spend around 13 hours per week watching streaming services. The most watched regular TV networks in the Brazil are Rede Globo, SBT, Band, Globo News, and Band News Channel.
- **Radio:** Brazil does not have radio stations with national, or even regional coverage. All radio stations have a local audience, sometimes covering only a few cities around their operation. Therefore, radio is not a particularly viable choice for promoting products specially for food products.



### 6.1.3 Fairs and exhibitions

Trade food fairs are not so numerous in Brazil, but they cover a broad range of sectors. However, they are becoming more attractive for product promotion and industry networking. Since there are only a few fairs and exhibitions in Brazil, they are a good choice for exposition, given that they concentrate numerous participants and potential partners from across the whole country into a few events.

In Brazil the professional food fairs and expos take place every year. Some of the biggest fairs in the country include the ABAS SHOW in São Paulo, organized by the supermarket association the ANUFOOD Brasil at São Paulo, SRE TRADE SHOW at Rio de Janeiro and Super Rio ExpoFood at Rio de Janeiro.

Brazil has moreover a lot of different food festivals in each of its states, from the CEAGESP Festive in São Paulo to spring festival in Salvador. There are festivals and events for nearly all kinds of foodstuff.

As some exhibitions might only reach local audience, it is advisable to research the exhibition's profile in advance to make sure to reach one's target audience. It is also worth remembering that participation costs are usually directly proportional to the rank of the exhibition and its scope. Finally, it should be remembered that food shows that target the general public may be effective ways of raising awareness of products already on the market but are likely to be of limited use for identifying potential partners when first entering a market (see section 4.4.3 for more information on targeting intermediaries).

A list of different upcoming food related events and fairs can be found online on websites such as:

- <https://saipos.com/melhores-restaurantes/festival-gastronomico>
- <https://blog.marketingmineiro.com.br/majores-eventos-gastronomicos-do-brasil/>
- <https://blog.grandchef.com.br/guia-festival-gastronomico>

## 6.2 Advertising regulations

In Brazil, regulations for food advertising are concentrated at the federal level. States do not have specific norms for this topic. In general, there are not many restrictions on food advertising. The main controls are applied to food advertising targeted to children.

In Brazil, the Consumer Protection Code regulates the advertising of food and beverages across the entire Brazilian territory and through all means of communication. This regulation is sovereign in the field, with no other governmental organizations involved in creating guidelines. The governmental entities listed below are responsible for overseeing and ensuring compliance with the Consumer Protection Code, taking appropriate measures in case of suspected violations.

- **Brazilian Health Regulatory Agency (ANVISA):** a federal agency which main role of Anvisa is to oversee advertising directed at food and beverages, ensuring that such communications comply with federal legislation. Additionally, the agency plays a crucial role in regulating and supervising issues related to the safety and quality of these products, ensuring compliance with established standards for consumer protection.
- **Consumer Protection and Defence Foundation. (Procon):** is a public legal entity with the primary mission of balancing and harmonising relationships between consumers and suppliers. The entity receives reports of non-compliant advertisements and conducts investigations to ensure that companies comply with federal law.

Similar to many other countries, the advertising industry in Brazil also undergoes monitoring / regulation through non-governmental organizations (NGOs), adopting a self-regulatory approach that is known for its effectiveness. A diverse array of NGOs operate in this field within Brazil:

- **Brazilian Advertising Self-Regulation Council (CONAR):** is a non-governmental organization composed of professionals, including advertisers, with the purpose of preventing deceptive or abusive advertising. Operating nationwide in Brazil, it reviews complaints and, if proven, recommends changes or suspends ads. Its mission is to ensure freedom of commercial expression while respecting constitutional principles of advertising.
- **Brazilian Association of Business Communication (Aberj):** a non-profit professional and scientific organization. The association, in partnership with member companies, conducts research, strategic studies, and publications for communication in general, including a guide of best practices related to the advertising of products and services.
- **Brazilian Association of Communication Agencies (ABRACOM):** the national association for the advertising agency sector in Brazil. With an extensive membership, its primary responsibility is to ensure the quality-of-service delivery and establish ethical parameters for operation.
- **Brazilian Association of Advertising Agencies (ABAP):** founded in 1949 ABAP's mission is to defend the interests of Brazilian agencies, seeking to strengthen ethical standards and best practices in the industry in the country. With a steadfast commitment to excellence, the association actively works to promote integrity and quality in advertising agency operations, contributing to a more ethical and efficient business environment.

## 7 Brazilian Etiquette

Brazilian etiquette is influenced by the country's diverse background which is influenced by a mix of indigenous, Portuguese, African and various other immigrant groups. Here are some general guidelines for Brazilian etiquette.

- Brazilian greeting often involve a huge and a kiss on the cheek, even sometimes in professional settings.
- Punctuality is general relaxed for social settings, but in business and more formal situations it is advisable to be on time.
- Portuguese is the official language, the use of English is limited across most of the country, and while some Brazilians may speak Spanish, its best to ask first as assuming they speak Spanish is often met with confusion or offense.
- Dress codes vary depending on the region and the occasion. In general, casual and comfortable attire is common, but formal wear may be required for certain events.
- If you are invited to someone's home, it's customary to bring a small gift or flowers for the host.
- Gift-giving is common during social occasions.
- Brazilian culture places importance on respect for elders. Its customary to address people with titles like "Senhor" or "Senhora" unless you are invited to use their first name.
- Small talk is common in Brazil and expected before business negotiations.

### 7.1 Key DOs and DON'Ts

Being aware of cultural and business etiquette in Brazil might ensure better odds of success as well as avoid any confusion when meeting with Brazilian trade partners. The sections below summarise the main positive and negative points that should be taken into consideration.

<b>DOs</b>	<b>DON'Ts</b>
<ul style="list-style-type: none"> <li>• Engage in small talk as this is common in Brazil.</li> <li>• Show respect to elders and use titles such as senhor and senhora.</li> <li>• Tipping is not obligatory but is appreciated.</li> <li>• Bring a gift if traveling to a home for the first time.</li> <li>• Learn some Portuguese phrases.</li> <li>• Be aware that greetings often involve a hug and a kiss on the cheek.</li> <li>• Dress codes vary but in general Brazilians dress quiet casually.</li> <li>• Avoid discussing political or religious matters.</li> </ul>	<ul style="list-style-type: none"> <li>• Travel to remoter regions of Brazil, particularly the amazon rainforest alone or unprepared.</li> <li>• Expect to travel around Brazil internally at a quick pace.</li> <li>• Use Spanish unless you ask if its possible first.</li> <li>• Expect to be able to use English.</li> <li>• Don't forget to change currency to BRL upon entry to Brazil.</li> <li>• Travel to certain areas of some cities (favelas) on your own and without proper appreciation for where you are.</li> </ul>

## 8 Directory of Trade Support Projects, Organisations, and Service Providers

There are a variety of services available, both within the EU and in Brazil, for producers wishing to export to Brazil. These service providers include EU-funded projects, services provided by the Member States and their embassies, other organisations and service providers, as well as buyers, importers, and distributors.

- Section 8.1 contains the project profiles for EU-funded initiatives operating in Brazil.
- Section 8.2 contains the contact information for Member State embassies within Brazil.
- Section 8.3 contains a listing of service providers including some information on the services available.
- Section 8.4 provides a calendar of exhibitions, trade shows, and other events to be held in Brazil.
- Section 8.5 contains a database of professional contacts (buyers, importers, and distributors).

### 8.1 European Union organisations

Certain EU-funded, or co-funded, projects within Brazil offer a range of business-enabling services and information providing important insights into the Brazilian market. Depending on your company profile these services can be free or fee-based and are available for companies from any EU Member State.



#### EU-LAC Foundation

The EU-LAC foundation was founded by the heads of state and government of the EU and the community of Latin American and Caribbean States (CELAC) to facilitate business and political discussions between the EU and CELAC member states such as Brazil.

#### Contacts

📍 ABC-Strasse 2 Hamburg

☎ (49) 40 80 60 11 452

✉ [info@eulacfoundation.org](mailto:info@eulacfoundation.org)

🌐 <https://www.european-chamber.com.cn/>



### Delegation of the European Union to Brazil

The EU delegation in Brazil represents the common interests of the Union in Brazil and works on enhancing and developing trade relations between the two markets. Except for consular tasks, the delegation in Brasilia functions like an embassy; it is a diplomatic mission to represent the European Union in Brazil. The EU Delegation includes a Trade Section also dealing with agri-food trade.

#### Contacts

📄 St. de Habitacoes Individuais Sul EQL 6/8 Lot B, Lago Sul, Brasilia

☎ (+55) 61 2104 3122

✉ [delegation-brazil@eeas.europa.eu](mailto:delegation-brazil@eeas.europa.eu)

🌐 <https://www.eeas.europa.eu/delegations/brazil>

## 8.2 Directory of EU Member State Embassies/Consulates

EU MS	Address	Contact information
<b>Austria</b>  <b>(Embassy)</b>	Avenida Das Nacoes, Quadra 811 – Lot 40, Brasilia	☎ +55 61 3443 3111 ✉ <a href="https://www.bmeia.gv.at/br/embaixa-da-da-austria-em-brasilia#">https://www.bmeia.gv.at/br/embaixa-da-da-austria-em-brasilia#</a> 🌐 <a href="https://www.bmeia.gv.at/">https://www.bmeia.gv.at/</a>
<b>Belgium</b>  <b>(Embassy)</b>	SES Address: Avenida das Nações, Quadra 809, Lote 32, 70422-900 Brasilia, Brazil.	☎ +55 61 344 311 33 ✉ <a href="mailto:brasilia@diplobel.fed.be">brasilia@diplobel.fed.be</a> 🌐 <a href="https://brazil.diplomatie.belgium.be/">https://brazil.diplomatie.belgium.be/</a>
<b>Bulgaria</b>  <b>(Embassy)</b>	, Asa Norte, CEP: 70800-911, Brasilia, DF, Brasil	☎ +55 61 3223 6193 ✉ Contact via website 🌐 <a href="https://www.mfa.bg/en/embassies/brazil">https://www.mfa.bg/en/embassies/brazil</a>
<b>Croatia</b>  <b>(Embassy)</b>	SHIS QI 09 Conjunto 11, Casa 3, Brasília-DF, 71625-110, Brazil	☎ +55 61 3248 0610 ✉ <a href="mailto:croemb.brasilia@mvep.hr">croemb.brasilia@mvep.hr</a> 🌐 <a href="http://br.mvep.hr/">http://br.mvep.hr/</a>
<b>Cyprus</b>  <b>(Consulate)</b>	QI 9, Conjunto 20, Casa 2, Lago Sul, Brasília-DF, 71625200	☎ +55 61 35 416 892 ✉ <a href="mailto:cyprusembassybrazil@uol.com.br">cyprusembassybrazil@uol.com.br</a> 🌐
<b>Czech Republic</b>  <b>(Consulate)</b>	SES 805, Lote 21-A, Via L3 Sul, Brasília-DF, 70200-901, Brazil	☎ +55 61 32 42 77 85 ✉ <a href="mailto:consulate_brasilia@mzv.cz">consulate_brasilia@mzv.cz</a> 🌐 <a href="http://www.mzv.cz/brasilia">http://www.mzv.cz/brasilia</a>
<b>Denmark</b>  <b>(Embassy)</b>	Avenida das Nações, Quadra 807, Lote. 26, Brasília-DF, 70200- 900, Brazil	☎ +55 61 38 78 45 00 ✉ Contact via website 🌐 <a href="http://brasilien.um.dk/">http://brasilien.um.dk/</a>
<b>Finland</b>  <b>(Embassy)</b>	Avenida das Nações, SES-Qd 807, Lt 27, Brasília-D	☎ +55 61 34 43 71 51 ✉ <a href="mailto:sanomat.BRA@formin.fi">sanomat.BRA@formin.fi</a> 🌐 <a href="https://um.fi/">https://um.fi/</a>
<b>France</b>  <b>(Embassy)</b>	Av.das Nações, lote 04, quadra 801, Brasília-DF	☎ +55 61 32 22 39 99 ✉ <a href="mailto:consulat.brasilia-amba@diplomatie.gouv.fr">consulat.brasilia-amba@diplomatie.gouv.fr</a> 🌐 <a href="http://brasilia.ambafrance-br.org/">http://brasilia.ambafrance-br.org/</a>



EU MS	Address	Contact information
<b>Germany</b>  <b>(Embassy)</b>	Rua Antonio Lumack do Monte, 128, 16° andar Boa Viagem, 51020-350 Recife PE., Recife	 +55 81 34 63 53 50  Contact via website  <a href="http://www.brasilien.diplo.de/">http://www.brasilien.diplo.de/</a>
<b>Greece</b>  <b>(Embassy)</b>	Av. Das Nações, Qd. 805, Lote 22, Brasília, Brasília-DF, 70480-900	 +55 61 34 43 65 73  Contact via website  <a href="http://www.mfa.gr/brazil">http://www.mfa.gr/brazil</a>
<b>Hungary</b>  <b>(Embassy)</b>	Av. das Nacoes Quadra 805 Lote 19 900 Brasília DF, Brasília-DF	 +55 61 34 43 08 36  <a href="mailto:consulate.brz@mfa.gov.hu">consulate.brz@mfa.gov.hu</a>  <a href="https://braziliavaros.mfa.gov.hu/">https://braziliavaros.mfa.gov.hu/</a>
<b>Ireland</b>  <b>(Embassy)</b>	SHIS QL 12, Conjunto 5, Casa 9, Brasília-DF, 71630-255	 +55 61 32 48 88 00  contact via website  <a href="http://www.dfa.ie/irish-embassy/brazil/">www.dfa.ie/irish-embassy/brazil/</a>
<b>Italy</b>  <b>(Embassy)</b>	SES Av. das Nações Q 807 Lote 30, BRASILIA DF, Brasília, Brazil	 +55 61 34 42 99 00  Contact via website  <a href="http://ambbrasil.esteri.it">ambbrasil.esteri.it</a>
<b>Lithuania</b>  <b>(Consulate)</b>	Avenida Irai 438, cj. 34, Indianópolis, São Paulo-SP	 +55 11 26 13 86 65  <a href="mailto:kons.br@mfa.lt">kons.br@mfa.lt</a>  <a href="http://br.mfa.lt/">http://br.mfa.lt/</a>
<b>The Netherlands</b>  <b>(Embassy)</b>	Av. Ataulfo de Paiva 204 - 6° andar Leblon, Rio de Janeiro	 +55 212 157 54 00  <a href="mailto:rio@minbuza.nl">rio@minbuza.nl</a>  <a href="http://www.netherlandsandyou.nl/your-country-and-the-netherlands/brazil/">http://www.netherlandsandyou.nl/your-country-and-the-netherlands/brazil/</a>
<b>Poland</b>  <b>(Embassy)</b>	Avenida das Nações, Quadra 809, Lote 33, Brasília-DF	 +55 61 32 12 80 00  <a href="mailto:brasilia.amb.sekretariat@msz.gov.pl">brasilia.amb.sekretariat@msz.gov.pl</a>  <a href="http://www.brasilia.msz.gov.pl/">http://www.brasilia.msz.gov.pl/</a>
<b>Portugal</b>  <b>(Embassy)</b>	Av. das Nações, Quadra 801, Lote 02, Brasília-DF, 70402-900	 +55 61 30 32 96 00  <a href="mailto:sconsular.brasilia@mne.pt">sconsular.brasilia@mne.pt</a>  <a href="http://www.embaixadadeportugal.org.br/">http://www.embaixadadeportugal.org.br/</a>
<b>Romania</b>  	SEN 6 - Asa Norte, Avenida das Nacoes, Quadra 801, Lote 06,	 +55 61 32 25 89 92  <a href="mailto:brasilia.consul@mae.ro">brasilia.consul@mae.ro</a>  <a href="http://brasilia.mae.ro/">http://brasilia.mae.ro/</a>

EU MS	Address	Contact information
<b>(Embassy)</b> <b>Slovakia</b>  <b>(Embassy)</b>	SES, Avenida da Nacoes, Qd. 805, Brasilia, Brasília, Brasília-DF	 +55 61 34 43 12 63  <a href="mailto:Emb.brasilia@mzv.sk">Emb.brasilia@mzv.sk</a>  <a href="http://www.mzv.sk/brazilia">http://www.mzv.sk/brazilia</a>
<b>(Embassy)</b> <b>Slovenia</b>  <b>(Embassy)</b>	SHIS - QL 8 - Conjunto 8 - Casa 7 - Lago Sul, Brasília-DF	 +55 61 33 65 14 45  <a href="mailto:sloembassy.brasilia@gov.si">sloembassy.brasilia@gov.si</a>  <a href="http://www.brasilia.embassy.si">www.brasilia.embassy.si</a>
<b>(Embassy)</b> <b>Spain</b>  <b>(Embassy)</b>	Avda das Nações, Q. 811, Lt 44. CEP 70429-900 Brasilia, D.F.	 +91 11 4129 3000  <a href="mailto:emb.nuevadelhi@maec.es">emb.nuevadelhi@maec.es</a>  <a href="http://www.exteriores.gob.es/embajadas/nuevadelhi">www.exteriores.gob.es/embajadas/nuevadelhi</a>
<b>(Embassy)</b> <b>Sweden</b>  <b>(Embassy)</b>	Avenida das Nações, Qd 807, Lt 29 Brasília	 +55 61 34 42 52 00  <a href="mailto:ambassaden.brasilia@gov.se">ambassaden.brasilia@gov.se</a>  <a href="http://www.swedenabroad.se/brasilia">http://www.swedenabroad.se/brasilia</a>

## 8.3 Other organisations and service providers

### 8.3.1 Trade promotion organisations (TPOs) and agri food promotion organisations (APOs)

#### Central offices inside EU Member States

EU MS	Address / location	Contact information
<b>Austria</b> Agrarmarkt Austria Marketing (APO)	Austria	<a href="https://www.ama.at/Home">https://www.ama.at/Home</a>
<b>Belgium (Flanders)</b> FIT (TPO)	Belgium	✉ <a href="mailto:michele.surinx@fitagency.be">michele.surinx@fitagency.be</a> <a href="http://www.flandersinvestmentandtrade.com">www.flandersinvestmentandtrade.com</a>
<b>Belgium (Flanders)</b> Flanders' Agricultural Marketing Board (APO)	Koning Albert II-laan 35 box 50 - 1030 Brussels Belgium	☎ +32 491861700 ✉ <a href="mailto:gert.vancausenbroeck@vlam.be">gert.vancausenbroeck@vlam.be</a> <a href="mailto:export@vlam.be">export@vlam.be</a> <a href="https://www.vlaanderen.be/vlam/">https://www.vlaanderen.be/vlam/</a>
<b>Belgium (Wallonia)</b> AWEX / Wallonia- Brussels, (TPO)	Place Saintelette 2, Brussels, Belgium	✉ <a href="mailto:agrifood@awex.be">agrifood@awex.be</a> <a href="http://wallonia.be/fr/investir">http://wallonia.be/fr/investir</a>
<b>Belgium (Brussels)</b> (TPO)	Belgium	<a href="https://hub.brussels/en/">https://hub.brussels/en/</a>
<b>Bulgaria</b> Bulgarian Small and Medium Enterprises Promotion Agency (TPO)	Bulgaria	<a href="https://www.sme.government.bg/en/">https://www.sme.government.bg/en/</a>
<b>Cyprus</b> Trade Service of the Ministry of Energy, Commerce and Industry (TPO)	6, Andreas Araouzos Street, 1421, Nicosia, Cyprus	☎ 00357 22867268 ✉ <a href="mailto:ts@meci.gov.cy">ts@meci.gov.cy</a> <a href="http://www.mcit.gov.cy/mcit/mcit.nsf/index_en/index_en">http://www.mcit.gov.cy/mcit/mcit.nsf/index_en/index_en</a>
<b>France</b> Business France	77 Boulevard Saint- Jacques, 75014 Paris, France	✉ <a href="mailto:agroalimentaire@businessfrance.fr">agroalimentaire@businessfrance.fr</a> <a href="https://www.businessfrance.fr/">https://www.businessfrance.fr/</a>
<b>France</b> SOPEXA (APO)	France	☎ (+33) 01 55 37 50 00 ✉ <a href="mailto:mybusiness@sopexa.com">mybusiness@sopexa.com</a>
<b>Estonia</b> Enterprise Estonia (TPO)	Estonia	☎ (+372) 6279421 ✉ <a href="mailto:info@eas.ee">info@eas.ee</a> <a href="https://www.eas.ee/?lang=en">https://www.eas.ee/?lang=en</a>
<b>Germany</b> Federation of German Food and Drink (APO)	Germany	☎ (+49) 30 200786-157 ✉ <a href="mailto:bve@bve-online.de">bve@bve-online.de</a> <a href="https://www.bve-online.de/english">https://www.bve-online.de/english</a>

EU MS	Address / location	Contact information
<b>Greece</b> Enterprise Greece / Office of Economic and Commercial Affairs (TPO)	109 Vasilisis Sophias Avenue, 115 21 Athens, Greece	☎ +30 210 335 5779 /+30 210 3355 729 ✉ <a href="mailto:v.kyrkou@eg.gov.gr">v.kyrkou@eg.gov.gr</a> <a href="mailto:a.gravanis@eg.gov.gr">a.gravanis@eg.gov.gr</a> 🌐 <a href="https://www.enterprisegreece.gov.gr/en/">https://www.enterprisegreece.gov.gr/en/</a>
<b>Hungary</b> Hungarian Export Promotion Agency (TPO)	Hungary	☎ (+36) 1 922 2600 ✉ <a href="mailto:info@hepa.hu">info@hepa.hu</a> 🌐 <a href="https://hepa.hu/en">https://hepa.hu/en</a>
<b>Ireland</b> Enterprise Ireland (TPO)	Ireland	🌐 <a href="https://www.enterprise-ireland.com/en/">https://www.enterprise-ireland.com/en/</a>
<b>Ireland</b> BoardBia (APO)	Ireland	🌐 <a href="https://www.bordbia.ie/">https://www.bordbia.ie/</a>
<b>Italy</b> Italian Trade Agency (TPO)	Via Liszt 21, Rome, Italy	✉ <a href="mailto:segreteria.marketing@ice.it">segreteria.marketing@ice.it</a> 🌐 <a href="https://www.ice.it/en/">https://www.ice.it/en/</a>
<b>Lithuania</b> Enterprise Lithuania (TPO)	Lithuania	🌐 <a href="https://www.versli Lietuva.lt/en/">https://www.versli Lietuva.lt/en/</a>
<b>Malta</b> Trade Malta (TPO)	Malta	🌐 <a href="https://www.trademalta.org/">https://www.trademalta.org/</a>
<b>Netherlands</b> Netherlands Enterprise Agency (TPO)	Netherlands	🌐 <a href="https://english.rvo.nl/">https://english.rvo.nl/</a>
<b>Portugal</b> Portuguese Trade & Investment Agency – AICEP (TPO)	Portugal	🌐 <a href="https://www.portugalglobal.pt/EN/Pages/Index.aspx">https://www.portugalglobal.pt/EN/Pages/Index.aspx</a>
<b>Slovenia</b> Spirit Slovenia (TPO)	Slovenia	✉ <a href="mailto:sonja.demsar@spiritslovenia.si">sonja.demsar@spiritslovenia.si</a> ; <a href="mailto:info@spiritslovenia.si">info@spiritslovenia.si</a> 🌐 <a href="https://www.sloveniabusines.eu/">https://www.sloveniabusines.eu/</a>
<b>Spain</b> FIAB (APO)	Spain	☎ +34 91 411 72 11 ✉ <a href="mailto:internacionalizacion@fiab.es">internacionalizacion@fiab.es</a> , <a href="mailto:v.puente@fiab.es">v.puente@fiab.es</a>
<b>Spain</b> ICEX	Paseo de la Castellana, 278 - 28046 Madrid, Spain	✉ <a href="mailto:maria.naranjo@icex.es">maria.naranjo@icex.es</a> 🌐 <a href="https://www.icex.es/icex/es/index.html">https://www.icex.es/icex/es/index.html</a>

## 8.3.2 Other service providers

SERVICE PROVIDER	ADDRESS	CONTACT INFORMATION
<b>SERVICES FOR AUSTRIAN COMPANIES</b>		
<b>Advantage Austria</b>	Av. Dr. Cardoso de Melo, 1340/71 Vila Olímpia 04548-004 São Paulo	+55 11 30 44 99 44 saupaulo@advantageaustria.org <a href="https://www.advantageaustria.org/">https://www.advantageaustria.org/</a>
<b>SERVICES FOR BELGIAN COMPANIES</b>		
<b>BelgaLux Brasil</b>	Av Paulista 2073 Sao Paulo	+55 11 32 84 95 57 belgalux@belgalux.com.br tel: <a href="https://belgalux.com.br/contato/">https://belgalux.com.br/contato/</a>
<b>SERVICES FOR CROATIAN COMPANIES</b>		
<b>Croatian Chamber of Economy</b>	Rooseveltov trg 2, 10000 Zagreb, Croatia	investicije@hgk.hr; hgk@hgk.hr <a href="http://www.investincroatia.hr">www.investincroatia.hr</a>
<b>SERVICES FOR CYPRIOT COMPANIES</b>		
<b>Cyprus Chamber of Commerce and Industry</b>	38, Grivas Dhigenis Ave. & 3, Deligiorgis Str., P.O.Box 21455, 1509 Nicosia	+357 22889800 chamber@ccci.org.cy
<b>SERVICES FOR DANISH COMPANIES</b>		
<b>Danish-Brazil chamber of commerce</b>	Rua Morais de Barros 1009, Sau Paulo	+55 21 32 39 48 50 camara@danchamb.com.br <a href="https://www.danchamb.com.br/">https://www.danchamb.com.br/</a>
<b>SERVICES FOR DUTCH COMPANIES</b>		
<b>Dutcham</b>	Avenida Brigadeiro Faria Limia, Sao Paulo	+55 11 978 561 294 Contact through website <a href="https://www.dutcham.com.br/">https://www.dutcham.com.br/</a>
<b>SERVICES FOR ESTONIAN COMPANIES</b>		
<b>Estonian Chamber of Commerce &amp; Industry</b>	Toom-Kooli 17, 10130 Tallinn	+372 604 0060 koda@koda.ee
<b>SERVICES FOR FINNISH COMPANIES</b>		
<b>Finnchamb</b>	Al. Campinas, 463/15, Sao Paulo	schamone@finncham.org.br <a href="https://www.finncham.org.br/">https://www.finncham.org.br/</a>
<b>SERVICES FOR FRENCH COMPANIES</b>		
<b>CCBF</b>	34 Cours Albert 1er, Paris	+ 33 01 45 22 48 contact@ccbf.fr <a href="https://www.ccbf.fr/">https://www.ccbf.fr/</a>
<b>SERVICES FOR GERMAN COMPANIES</b>		
<b>DWIH</b>	Rua Verbo Divino, Sao Paulo	+55 11 51 87 51 00 ahkbrasil@ahkbrasil.com <a href="https://www.dwih-saopaulo.org/">https://www.dwih-saopaulo.org/</a>
<b>SERVICES FOR GREEK COMPANIES</b>		
<b>Union of Hellenic chamber of commerce</b>	6 Akadimias, Athens	+210 3387 104 keehcci@uhc.gr <a href="https://www.uhc.gr/">https://www.uhc.gr/</a>
<b>SERVICES FOR HUNGARIAN COMPANIES</b>		

SERVICE PROVIDER	ADDRESS	CONTACT INFORMATION
Hungarian chamber of commerce and industry	7 Szabadsag, Budapest	+36 1 474 5100 ✉ <a href="mailto:mkik@mkik.hu">mkik@mkik.hu</a> 🌐 <a href="https://mkik.hu/">https://mkik.hu/</a>
<b>SERVICES FOR IRISH COMPANIES</b>		
Enterprise Ireland	East point business park, Dublin 3	+353 1 727 2000 ✉ Contact through website 🌐 <a href="https://www.enterprise-ireland.com/">https://www.enterprise-ireland.com/</a>
<b>SERVICES FOR ITALIAN COMPANIES</b>		
Italy Brazil chamber of commerce	Rua Piaui 2, 5 Andar Bairro Funcionarios, Minas Gerais	+55 31 32 87 22 11 ✉ <a href="mailto:info@italiabresil.com.br">info@italiabresil.com.br</a> 🌐 <a href="https://www.italiabrasil.com.br/">https://www.italiabrasil.com.br/</a>
<b>SERVICES FOR LATVIAN COMPANIES</b>		
Latvian Chamber of commerce and industry	35 Krisjana Valdemara str., Riga, LV-1010, Latvia	+371 67225592 ✉ <a href="mailto:info@chamber.lv">info@chamber.lv</a>
<b>SERVICES FOR LITHUANIAN COMPANIES</b>		
Lithuanian Chamber of commerce and industry	Vašingtono sq. 1-63a, LT-01108 Vilnius	+370 2613 102 ✉ <a href="mailto:info@chambers.Lt">info@chambers.Lt</a> 🌐 <a href="https://chambers.lt/en/">https://chambers.lt/en/</a>
<b>SERVICES FOR LUXEMBURG COMPANIES</b>		
Belgalux Brasil	Av Paulista 2073 Sao Paulo	+55 11 32 84 95 57 ✉ <a href="mailto:belgalux@belgalux.com.br">belgalux@belgalux.com.br</a> 🌐 <a href="https://belgalux.com.br/contato/">tel:https://belgalux.com.br/contato/</a>
<b>SERVICES FOR MALTESE COMPANIES</b>		
The Malta Chamber of Commerce, Enterprise and Industry	64, Republic Street, Valletta, Malta	+ 356 2203 2000 🌐 <a href="https://www.maltachamber.org.mt/">https://www.maltachamber.org.mt/</a>
<b>SERVICES FOR POLISH COMPANIES</b>		
Polish chamber of commerce	Obrzeżna 5, Xlp., 02-691 Warsaw	+ 48 223 291 323 ✉ <a href="mailto:office@cigpl.org">office@cigpl.org</a> 🌐 <a href="https://cigpl.org/">https://cigpl.org/</a>
<b>SERVICES FOR PORTUGUESE COMPANIES</b>		
Camara de Comercio Brasil	Rua Das Portas de Santo Antao, 89	+ 351 21 32 24 05 ✉ <a href="http://geral@ccilc.pt/">http://geral@ccilc.pt/</a> 🌐 <a href="http://www.ccilcmacau.org.mo/">http://www.ccilcmacau.org.mo/</a>
<b>SERVICES FOR ROMANIAN COMPANIES</b>		
Chamber of Commerce and Industry of Romania	Address: 2, Octavian Goga Blvd, sector 3, 030982 Bucharest	+40 21 3117534 ✉ <a href="mailto:narcis.pirnaeu@ccir.ro">narcis.pirnaeu@ccir.ro</a> 🌐 <a href="http://www.ccir.ro">www.ccir.ro</a>
<b>SERVICES FOR SLOVAK COMPANIES</b>		
Slovak Chamber of Commerce & Industry	Gorkého 9, 81603 Bratislava, Slovakia	+421 2 54433272
<b>SERVICES FOR SLOVENIAN COMPANIES</b>		
Chamber of Commerce and Industry of Slovenia	Dimičeva 13, SI-1504 Ljubljana	+386 1 5898 000 ✉ <a href="mailto:info@gzs.si">info@gzs.si</a>
<b>SERVICES FOR SPANISH COMPANIES</b>		



SERVICE PROVIDER	ADDRESS	CONTACT INFORMATION
<b>Camara Brasil</b>	Av Eng, Luis Carlos Berrini, Sao Paulo	☎ +55 08 59 59 ✉ <a href="mailto:camaraespanhola@camaraespanhola.org.br">camaraespanhola@camaraespanhola.org.br</a> 🌐 <a href="https://camaraespanhola.org.br/">https://camaraespanhola.org.br/</a>
<b>SERVICES FOR SWEDISH COMPANIES</b>		
<b>Swedcham Brasil</b>	Rua Oscar Freire, Sao Paulo	☎ +55 11 30 66 25 50 ✉ <a href="mailto:brazil@swedcham.com.br">brazil@swedcham.com.br</a> 🌐 <a href="https://www.swedcham.com.br/">https://www.swedcham.com.br/</a>

## 8.4 Calendar of 2024

Attending Brazilian trade and consumer shows can help EU exporters better understand the market and identify partners. A list with some examples is provided below.

Event	Date	Recurrence	Venue	Organiser Details
<b>April 2024</b>				
Anuga / Anufood select	9 <sup>th</sup> – 11 <sup>th</sup>	Annual	Anhembi District, Sao Paulo	✉ <a href="#">Through website</a> 🌐 <a href="https://anuga-brazil.com.br/en/">https://anuga-brazil.com.br/en/</a>
<b>May 2024</b>				
APAS	13 <sup>th</sup> - 16 <sup>th</sup>	Annual	Expo Centre Norte, Sao Paulo	☎ +55 (11) 3647-5000 ✉ <a href="mailto:central.apas@apas.com.br">central.apas@apas.com.br</a> 🌐 <a href="https://apasshow.com/">https://apasshow.com/</a>
<b>June 2024</b>				
Fispal Food Service	11 <sup>th</sup> – 14 <sup>th</sup>	Annual	Expo Centre Norte, Sao Paulo	✉ <a href="mailto:atendimento.fispalfood@informamarkets.com.br">atendimento.fispalfood@informamarkets.com.br</a> 🌐 <a href="https://www.fispalfoodservice.com.br/">https://www.fispalfoodservice.com.br/</a>
<b>July 2024</b>				
Fipan	23 <sup>rd</sup> -26 <sup>th</sup>	Annual	Expo Centre Norte, Sao Paulo	☎ + 55 11 315904223 ✉ <a href="#">Through website</a> 🌐 <a href="https://fipan.com.br/">https://fipan.com.br/</a>
<b>October 2024</b>				
Prowine	1 <sup>st</sup> – 3 <sup>rd</sup>	Annual	Expo Centre Norte, Sao Paulo	☎ + 55 11 2365-4313 ✉ <a href="mailto:prowinesaopaulo@prowinesaopaulo.com.br">prowinesaopaulo@prowinesaopaulo.com.br</a> 🌐 <a href="https://prowinesaopaulo.com/">https://prowinesaopaulo.com/</a>
HFN Hotel & Food Nordest	2 <sup>nd</sup> – 4 <sup>th</sup>	Annual	Pernambuco Convention Center, Olinda,	☎ + 55 (81) 3049-2449 ✉ <a href="mailto:contato@insightconecta.com.br">contato@insightconecta.com.br</a> 🌐 <a href="https://hfne.com.br/">https://hfne.com.br/</a>
<b>November 2024</b>				
Chocolat festival	Varies	Annual	Varies	🌐 <a href="https://chocolatfestival.com/s">https://chocolatfestival.com/s</a>
<b>March 2025</b>				

**SRE tradeshow**


**Mid-March**

**Annual**

**Riocentro, Rio  
de Janeiro**

 + 55 21 3005-9571

 [sre@hy-in.com.br](mailto:sre@hy-in.com.br)

 <https://sretradeshow.com.br/>

## 8.5 Database of professionals' contacts

### 8.5.1 List of relevant buyers, importers, and distributors

Company name	Type	Area of interest	Contact information
Adega Alentejana	Import/ Distribution	F&B (Portuguese in particular)	+55 (11) 5094-5760 ✉ <a href="mailto:atendimento@adegaalentejana.com.br">atendimento@adegaalentejana.com.br</a> 🌐 <a href="https://www.alentejana.com.br/">https://www.alentejana.com.br/</a>
Alliance Foods	Import/ Distribution	F&B	+55 (11) 4324-2855 ✉ <a href="mailto:af@alliancefoods.com.br">af@alliancefoods.com.br</a> 🌐 <a href="https://www.alliancefoods.com.br">https:// www.alliancefoods.com.br</a>
Allog	Import/ Distribution	F&B	+55 (11) 4210-3290 🌐 <a href="https://www.allog.com.br/">https://www.allog.com.br/</a>
Andreani	Import/Distribution	F&B	✉ <a href="mailto:dpo@andreani.com">dpo@andreani.com</a> 🌐 <a href="https://www.andreani.com.br/">https://www.andreani.com.br/</a>
Assaí Atacadista	Markets	F&B	+55 0800 773 2322 🌐 <a href="https://www.assai.com.br/nossas-lojas">https://www.assai.com.br/nossas-lojas</a>
Atacadão	Markets	F&B	✉ <a href="mailto:faleconosco@atacado.com.br">faleconosco@atacado.com.br</a> 🌐 <a href="http://www.atacado.com.br/institucional/nossas-lojas">www.atacado.com.br/institucional/nossas-lojas</a>
Atakadão Atakarejo	Market	F&B	+55 (71) 3460-8700 🌐 <a href="https://atakarejo.com.br/">https://atakarejo.com.br/</a>
Atlantic distributors Inc	Import/ Distribution	F&V	(+55) (11) 2528-4168 ✉ <a href="mailto:comercial@atlanticsgroup.com.br">comercial@atlanticsgroup.com.br</a> 🌐 <a href="https://atlanticsgroup.com.br/">https://atlanticsgroup.com.br/</a>
BBM Logística	Distribution	F&B	+55 (41) 2169-0055 ✉ <a href="mailto:bbm@bbmlogistica.com.br">bbm@bbmlogistica.com.br</a> 🌐 <a href="https://www.bbmlogistica.com.br/">https://www.bbmlogistica.com.br/</a>
Bella Italia	Import/ Distribution	Italian F&B	(+55) 11997669312 ✉ <a href="mailto:adegapilandro@gmail.com">adegapilandro@gmail.com</a>
Benassi Grupo	Import/ Distribution	Italian F&B	+55 (11) 4531-8100 ✉ <a href="mailto:sac@benassisp.com">sac@benassisp.com</a> 🌐 <a href="http://grupobenassi.com.br/">http://grupobenassi.com.br/</a>
Blue Royal Logistic	Import/ Distribution	Pasta	+55 (15) 3418-8400 ✉ <a href="mailto:comercial@brlogistic.com.br">comercial@brlogistic.com.br</a> 🌐 <a href="https://brlogistic.com.br/">https://brlogistic.com.br/</a>
Bodegas wine	Import/ Distribution	Wine	+55 31 98288 0999 ✉ <a href="mailto:financeirob2b@wine.com.br">financeirob2b@wine.com.br</a>

Company name	Type	Area of interest	Contact information
			 <a href="https://www.bodegaswine.com.br/">https://www.bodegaswine.com.br/</a>
BOMI Group	Distribution	F&B	 +55 (11) 4774-8033  <a href="https://www.bomigroup.com/pt-br/">https://www.bomigroup.com/pt-br/</a>
Borges	Distribution	F&B	 (+55) (11) 3155-5545  <a href="mailto:contabilidade@jdvcontabil.com.br">contabilidade@jdvcontabil.com.br</a>
Brado	Distribution	F&B	 +55 41 2118-2800  <a href="https://www.brado.com.br/">https://www.brado.com.br/</a>
Bravolog	Distribution	F&B	 <a href="https://bravolog.com.br/">https://bravolog.com.br/</a>
Cantu	Import / Distribution	Wine	 +55 (27) 3398-9471  Through website  <a href="https://www.cantugrupowine.com.br/">https://www.cantugrupowine.com.br/</a>
Capital Agro	Import/ Distribution	F&B	 <a href="mailto:export@capitalagro.com">export@capitalagro.com</a>  <a href="https://capitalagro.com/">https://capitalagro.com/</a>
Carrefour Brasil	Markets	F&B	 +55 (11) 94398-5325  <a href="mailto:ribrasil@carrefour.com">ribrasil@carrefour.com</a>  <a href="https://www.grupocarrefourbrasil.com.br/">https://www.grupocarrefourbrasil.com.br/</a>
Casa Flora	Import / Distribution	Gourmet foods, alcoholic drinks	 +55 (11) 3327-5199  Through website  <a href="https://www.casaflora.com.br/">https://www.casaflora.com.br/</a>
Casa Santa Luzia	Markets	F&B	 +55 (11) 3897-5000  <a href="mailto:sac@santaluzia.com.br">sac@santaluzia.com.br</a>  <a href="https://www.santaluzia.com.br/">https://www.santaluzia.com.br/</a>
Casa Lisboa	Import/ Distribution	Wine Spirits &	 +55 (11) 2296-0657  <a href="mailto:atendimento@casalisboa.com.br">atendimento@casalisboa.com.br</a>  <a href="https://www.casalisboa.com.br/loja-virtual/">https://www.casalisboa.com.br/loja-virtual/</a>
Cencosud Brasil	Market	F&B	 <a href="mailto:ri@cencosud.com.br">ri@cencosud.com.br</a>  <a href="https://ri.cencosud.com.br/">https://ri.cencosud.com.br/</a>
Companhia Brasileira de Distribuição	Markets	F&B	 +55 (11) 3889-7718  <a href="mailto:ouvidoria@gpabr.com">ouvidoria@gpabr.com</a>  <a href="https://www.gpabr.com/en/">https://www.gpabr.com/en/</a>
Companhia Zaffari	Market	F&B	 +55 4004 1112  <a href="https://www.grupozaaffari.com.br/">https://www.grupozaaffari.com.br/</a>
Constante LDA	Import/ Distribution	Fish	 +0 (35 12)932083  <a href="https://interfishmarket.com">https://interfishmarket.com</a>

Company name	Type	Area of interest	Contact information
Coop – Cooperativa de Consumo	Market	F&B	☎ +55 0800-772-2667 🌐 <a href="https://www.portalcoop.com.br/">https://www.portalcoop.com.br/</a>
Coopercarga	Distribution	F&B	☎ +55 (49) 3301-7000 ✉ <a href="mailto:coopercarga@coopercarga.com.br">coopercarga@coopercarga.com.br</a> 🌐 <a href="https://www.coopercarga.com.br/">https://www.coopercarga.com.br/</a>
Craft Multimodal	Import/Distribution	Pasta	☎ +55 (11) 4314-8001 🌐 <a href="https://e-craft.com/pt/">https://e-craft.com/pt/</a>
Daki	Market	F&B	✉ <a href="mailto:imprensa@soudaki.com">imprensa@soudaki.com</a> 🌐 <a href="https://soudaki.com/">https://soudaki.com/</a>
Deutsch Family Wine & Spirits	Import/ Distribution	Wine & Spirits	✉ Contact via website 🌐 <a href="https://www.deutschfamily.com">https://www.deutschfamily.com</a>
Diretto House of Brands	Distribution	F&B	✉ <a href="mailto:comercial@diretto.com.vc">comercial@diretto.com.vc</a> 🌐 <a href="https://www.diretto.com.vc">https://www.diretto.com.vc</a>
DMA Distribuidora	Import/ Distribution	F&B	☎ +55 (31) 3389-5536 ✉ <a href="mailto:ri@grupodma.com.br">ri@grupodma.com.br</a> 🌐 <a href="https://grupodma.com.br/">https://grupodma.com.br/</a>
DSV	Import/ Distribution	F&B	🌐 <a href="https://www.dsv.com/pt-br/">https://www.dsv.com/pt-br/</a>
Dupont	Import/Distribution	F&B	☎ + 55 (11) 4347-6172 🌐 <a href="https://www.dupont.com.br/">https://www.dupont.com.br/</a>
Eataly	Import/Distribution	Italian F&B	☎ +55 (11) 3279-3300 ✉ Contact through website 🌐 <a href="https://www.eataly.com/">https://www.eataly.com/</a>
ECU Worldwide	Import/ Distribution	Vegetables	☎ +55 (11) 2596-8100 🌐 <a href="https://ecuworldwide.com/">https://ecuworldwide.com/</a>
Elite Vinho	Import/ Distribution	Wine & Spirits	🌐 <a href="https://elitevinho.com.br/">https://elitevinho.com.br/</a>
Formaggio Distribuição de Alimentos	Import/ Distribution	F&B	☎ (+55) 81 3341-5997 🌐 <a href="http://www.formaggiofoodservice.com.br">www.formaggiofoodservice.com.br</a>
Gafor	Distribution	F&B	☎ +55 (11) 2107-3100 ✉ <a href="mailto:comercial@gafor.com.br">comercial@gafor.com.br</a> 🌐 <a href="https://www.gafor.com.br/pt-BR">https://www.gafor.com.br/pt-BR</a>
Gallo Brasil Distribuição	Import/ Distribution	Olive oil	☎ +55 (11) 3522-5750 ✉ <a href="mailto:fiscal.br@galloww.com">fiscal.br@galloww.com</a> 🌐 <a href="https://www.galloportugal.com/pt-br/">https://www.galloportugal.com/pt-br/</a>
Geodis	Distribution	F&B	☎ +55 19 3225-6954 🌐 <a href="https://geodis.com/br">https://geodis.com/br</a>
Giassi Supermercados	Market	F&B	☎ +55 0800 648 0001 🌐 <a href="https://www.giassi.com.br/">https://www.giassi.com.br/</a>



Company name	Type	Area of interest	Contact information
Globelink	Import/ Distribution	F&B	☎ +55 (65) 6225 1833 🌐 <a href="http://www.cwt-globelink.com">www.cwt-globelink.com</a>
Grand Cru	Import/ Distribution	Wine & Spirits	☎ +55 4007 1752 🌐 <a href="https://www.grandcru.com.br/">https://www.grandcru.com.br/</a>
Grupo JC – Costa Atacadão	Market	F&B	✉ <a href="mailto:sac@costaatacado.com.br">sac@costaatacado.com.br</a> 🌐 <a href="https://costaatacado.com.br/">https://costaatacado.com.br/</a>
Grupo Mateus	Markets	F&B	☎ +55 (98) 2108-3541 ✉ <a href="mailto:amanda.glima@grupomateus.com.br">amanda.glima@grupomateus.com.br</a> 🌐 <a href="https://www.grupomateus.com.br/">https://www.grupomateus.com.br/</a>
Grupo Muffato	Market	F&B	☎ +55 0800 727 9595 🌐 <a href="https://www.supermuffato.com.br/">https://www.supermuffato.com.br/</a>
Grupo Supernosso	Market	F&B	☎ +55 (31) 3369-4550 ✉ <a href="mailto:sac@supernossoemcasa.com.br">sac@supernossoemcasa.com.br</a> 🌐 <a href="https://www.supernosso.com/">https://www.supernosso.com/</a>
Grupo Toniato	Import/ Distribution	F&B	☎ +55 (11) 3478-0809 ✉ <a href="mailto:comunicacao@grupotoniato.com.br">comunicacao@grupotoniato.com.br</a> 🌐 <a href="https://www.grupotoniato.com.br/">https://www.grupotoniato.com.br/</a>
Harycia	Import/Distribution	F&B	☎ (+1) 786 457 90009 ✉ <a href="mailto:ar@harycia.com">ar@harycia.com</a> 🌐 <a href="https://harycia.com/">https://harycia.com/</a>
Hillebrand Gori	Import/ Distribution	Wine & Spirits	☎ +55 (11) 37022050 🌐 <a href="https://www.hillebrandgori.com/">https://www.hillebrandgori.com/</a>
Hirota Food	Markets	F&B	☎ +55 (11) 3207-4901 🌐 <a href="https://hirotafood.com.br/">https://hirotafood.com.br/</a>
Interfood	Import/ Distribution	Alcoholic drinks	☎ +55 (11) 9 9278-9369 ✉ <a href="mailto:faleconosco@interfood.com.br">faleconosco@interfood.com.br</a> 🌐 <a href="https://www.interfood.com.br/">https://www.interfood.com.br/</a>
Interglobo	Import/ Distribution	Pasta	☎ +55 (11) 2295 0646 ✉ <a href="mailto:info@interglobo.com">info@interglobo.com</a> 🌐 <a href="https://www.interglobo.com/">https://www.interglobo.com/</a>
Italian online food	Import/ Distribution	Italian F&B	☎ (+1) 954 440-2917 ✉ Contact through website 🌐 <a href="https://italianfoodonlinestore.com/">https://italianfoodonlinestore.com/</a>
Jaú Serve	Market	F&B	☎ +55 0800 015 46 00 ✉ <a href="mailto:sac@jauserve.com.br">sac@jauserve.com.br</a> 🌐 <a href="https://www.jauservesupermercados.com.br/">https://www.jauservesupermercados.com.br/</a>
JSL	Import/ Distribution	F&B	☎ +55 0800 01 95 755

Company name	Type	Area of interest	Contact information
			 <a href="https://jsl.com.br/pt_BR/">https://jsl.com.br/pt_BR/</a>
Justo	Market	F&B	 +55 (11) 97821-0274  <a href="https://soujusto.com.br">https://soujusto.com.br</a>
Klog Logística	Import/ Distribution	F&B	 <a href="mailto:comercial@kloglogistica.com.br">comercial@kloglogistica.com.br</a>  <a href="https://kloglogistica.com.br/">https://kloglogistica.com.br/</a>
Kothe	Import/ Distribution	F&B	 +55 (63) 3411-3500  <a href="https://kothe.com.br/">https://kothe.com.br/</a>
La Pastina	Import/ Distribution	Wine, gourmet foods	 +55 (11) 4003-4866  Through website  <a href="https://www.lapastina.com/">https://www.lapastina.com/</a>
Mart Minas	Market	F&B	 <a href="https://martminas.com.br/">https://martminas.com.br/</a>
Meijer	Import/ Distribution	F&B	 +55 (11) 4930-9800  Contact through website  <a href="https://www.cascadebrazil.com">https://www.cascadebrazil.com</a>
Mistral	Import/ Distribution	Wine	 +55 (11) 3130-4646  <a href="mailto:info@mistral.com.br">info@mistral.com.br</a>  <a href="https://www.mistral.com.br/">https://www.mistral.com.br/</a>
Mondiale VGL	Import/ Distribution	Pasta	 <a href="https://mondialevgl.com/about-us">https://mondialevgl.com/about-us</a>
Movecta	Import/Distribution	F&B	 +55 (11) 3469-7040  <a href="mailto:atendimento.anh@movecta.com.br">atendimento.anh@movecta.com.br</a>  <a href="https://movecta.com.br/">https://movecta.com.br/</a>
Oba	Markets	F&V	 <a href="https://www.obahortifruiti.com.br/">https://www.obahortifruiti.com.br/</a>
Oxxo	Markets	F&B	 +55 0800-747-6996  <a href="mailto:fale@mercadooxxo.com.br">fale@mercadooxxo.com.br</a>  <a href="https://www.oxxo.com.br/home">https://www.oxxo.com.br/home</a>
Pão de Açúcar Adegas	Import/ Distribution	Wine	 +55 0800 779 6761  <a href="https://www.gpabr.com/en/business-and-brands/brands/pao-de-acucar-adeaga/">https://www.gpabr.com/en/business-and-brands/brands/pao-de-acucar-adeaga/</a>
Plurix	Market	F&B	 <a href="mailto:contato@plurix.com">contato@plurix.com</a>  <a href="https://www.plurix.com/">https://www.plurix.com/</a>
Rede Brasil	Import/ Distribution for supermarkets	F&B	 +55 (11) 5054-2932  <a href="mailto:redebrasil@rbsm.com.br">redebrasil@rbsm.com.br</a>  <a href="https://rbsm.com.br/">https://rbsm.com.br/</a>
Ricex	Import/ Distribution	F&B	 (+55) 11 2181-0252  <a href="mailto:contato@ricex.com.br">contato@ricex.com.br</a>  <a href="https://www.ricex.com.br/contato">https://www.ricex.com.br/contato</a>
Rick Doces	Import/ Distribution	Biscuits	 +55 (11) 3271-5822  <a href="mailto:pedidosite@rickdoces.com.br">pedidosite@rickdoces.com.br</a>

Company name	Type	Area of interest	Contact information
			 <a href="https://www.rickdoces.com.br/">https://www.rickdoces.com.br/</a>
Sam's Club	Markets	F&B	 +55 0800 705 5054  <a href="https://www.samsclub.com.br/">https://www.samsclub.com.br/</a>
Savegnago Supermercados	Market	F&B	 +55 0800 0166680  <a href="mailto:atendimento@savegnago.com.br">atendimento@savegnago.com.br</a>  <a href="https://www.savegnago.com.br/">https://www.savegnago.com.br/</a>
Sea Food Brasil	Import/ Distribution	Sea Food	 <a href="mailto:falecom@seafoodbrasil.com.br">falecom@seafoodbrasil.com.br</a>  <a href="https://www.seafoodbrasil.com.br">https://www.seafoodbrasil.com.br</a>
Sonda Supermercados	Market	F&B	 +55 (11) 2145-6220  <a href="http://www.sonda.com.br">www.sonda.com.br</a>
St. Marche	Markets	F&B	 <a href="mailto:ajuda@marche.com.br">ajuda@marche.com.br</a>  <a href="https://www.marche.com.br/nossas-lojas">https://www.marche.com.br/nossas-lojas</a>
Supermercados Angeloni	Market	F&B	 +55 (48) 4002 6060  <a href="https://www.angeloni.com.br/super/">https://www.angeloni.com.br/super/</a>
Supermercados BH	Market	F&B	 +55 (31) 3117-260  <a href="https://www.supermercadosbh.com.br/belo-horizonte/">https://www.supermercadosbh.com.br/belo-horizonte/</a>
Supermercados Pague Menos	Market	F&B	 +55 (11) 4003-3296  <a href="https://www.superpaguemenos.com.br/">https://www.superpaguemenos.com.br/</a>
Tradespo Olives – Vale Fértil	Import/ Distribution	Olive	 +55 (41) 2101-8000  <a href="mailto:sac@valefertil.com.br">sac@valefertil.com.br</a>  <a href="https://valefertil.com.br/">https://valefertil.com.br/</a>
Vinoli	Import/ Distribution	Wine Spirits &	 +55 (11) 914390999  <a href="mailto:distribuidora@vinoli.com.br">distribuidora@vinoli.com.br</a>  <a href="https://www.vinoli.com.br/">https://www.vinoli.com.br/</a>
Vivino	Import/ Distribution	Wine & Spirit	 <a href="https://www.vivino.com/BR/pt-BR/">https://www.vivino.com/BR/pt-BR/</a>
Wine Boss	Import/ Distribution	Wine Spirits &	 +55 (41) 99765-1212  <a href="mailto:contato@wineboss.com.br">contato@wineboss.com.br</a>  <a href="https://www.wineboss.com.br/">https://www.wineboss.com.br/</a>
Wine Out	Import/ Distribution	Wine Spirits &	 +55 (21) 97117-9940  <a href="mailto:adm@wineout.com.br">adm@wineout.com.br</a>  <a href="https://wineout.com.br/">https://wineout.com.br/</a>
Zona Sul	Import/ Distribution (supermarket)	F&B	 Through website  <a href="https://www.zonasul.com.br/">https://www.zonasul.com.br/</a>

## GETTING IN TOUCH WITH THE EU

### In person

All over the European Union there are hundreds of Europe Direct information centres. You can find the address of the centre nearest you at: [https://europa.eu/european-union/contact\\_en](https://europa.eu/european-union/contact_en)

### On the phone or by email

Europe Direct is a service that answers your questions about the European Union. You can contact this service:

- by freephone: 00 800 6 7 8 9 10 11 (certain operators may charge for these calls),
- at the following standard number: +32 22999696, or
- by email via: [https://europa.eu/european-union/contact\\_en](https://europa.eu/european-union/contact_en)

## FINDING INFORMATION ABOUT THE EU

### Online

Information about the European Union in all the official languages of the EU is available on the Europa website at: [https://europa.eu/european-union/index\\_en](https://europa.eu/european-union/index_en)

### EU publications

You can download or order free and priced EU publications from: <https://op.europa.eu/en/publications>. Multiple copies of free publications may be obtained by contacting Europe Direct or your local information centre (see [https://europa.eu/european-union/contact\\_en](https://europa.eu/european-union/contact_en)).

### EU law and related documents

For access to legal information from the EU, including all EU law since 1952 in all the official language versions, go to EUR-Lex at: <http://eur-lex.europa.eu>

### Open data from the EU

The EU Open Data Portal (<http://data.europa.eu/euodp/en>) provides access to datasets from the EU. Data can be downloaded and reused for free, for both commercial and non-commercial purposes.

