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Report Highlights:

Brazilian imports of U.S. agricultural products grew by 4 percent in 2025 totaling $925 million, driven largely by growth in intermediate products that support the country's robust and growing food and feed manufacturing industries. The market's fragmented retail and food service sectors require a long-term approach to achieve significant trade volumes for consumer-oriented items. Nevertheless, food and beverage items offering premium or unique qualities have the potential to appeal to the large consumer base of 40 million high-income Brazilians.

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT POLICY

Exporter Guide

Executive Summary

Brazil is the largest economy in Latin America and one of the largest in the world. In 2025, Brazil's gross domestic product (GDP) increased 2.3 percent compared to the previous year, driven by agriculture and the services sector.

Consumer-Oriented Agricultural Imports

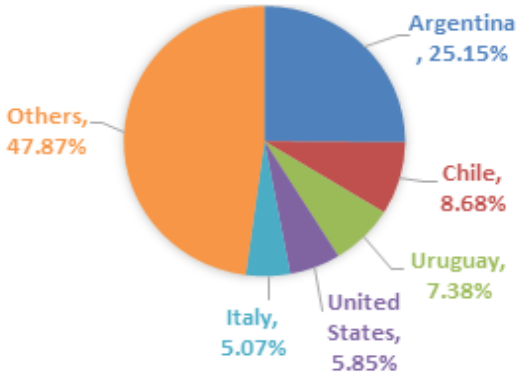


Chart 1: Top Exporting Countries to Brazil, Trade Data Monitor (TDM)

Food Retail Industry

The Brazilian Supermarket Association (ABRAS) reported supermarket sales at USD 197 billion in 2024 – a 9.3 percent increase compared to the previous year. The highly fragmented retail sector includes nearly 425,000 stores and represents 9.1 percent of Brazil's GDP. The Southeastern region of Brazil has the largest share of the retail industry, with 62 percent of revenues.

Food Processing Industry

According to the Brazilian Food Processors' Association (ABIA), Brazil's food processing sector registered revenues of $248 billion in 2025, an increase of 8 percent compared to 2024.

Food Service Industry

Brazil is among the five largest foodservice markets in the world, characterized by high fragmentation, with many small and medium-sized businesses. According to the Brazilian Bars and Restaurants Association (ABRASEL), the sector revenues reached $88.5 billion in 2025.

Quick Facts CY 2025

Imports of Consumer-Oriented Products:
USD 7.1 billion

Top 10 Imported Growth Products in 2025

Cocoa Beans	Pork Products
Chocolate Products	Tree Nuts
Non-Alcoholic Bev.	Processed Food
Tea	Bakery Goods & Cereals
Distilled Spirits	Chewing Gum & Candy

Source: SECEX

Food Industry by Channels (U.S. Billion $) in 2025

Food Industry Total Output	$248
Retail	$130
Food Exports	$66
Food Service	$52

Source: ABIA

Top 10 Brazilian Retailers in 2025

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

Source: ABRAS

Population *(millions):* 213
GDP (*trillion USD*): 2.27
GDP per capita *(USD*): 10,677
Source: Brazilian Institute of Geography and Statistics

Strengths/Weaknesses/Opportunities/Threats

Strengths	**Weakness**
Robust food processing industry that supplies much of South America	Highly dependent on imported food additives.
Opportunities	**Threats**
The Mercosur–EU agreement presents an opportunity to expand the food industry.	Higher energy prices may increase food costs and shift consumption toward lower-value products.

Section I: Market Overview

In 2025, Brazil's gross domestic product (GDP) reached approximately $2.27 trillion, growing by 2.3 percent over the previous year. Brazil's vast geography, large population, and abundant natural resources make it one of the world's most important agricultural producers and exporters. As a result, domestic food processing has increased rapidly with Brazilian industry now producing substitutes for many previously imported products. Consumers, however, continue to seek premium imports. This creates demand for ingredients that can help food manufacturers replicate international products and for unique consumer-oriented foods and beverages.

Brazil is home to more than 40 million high-earning potential consumers - a number larger than the entire population of many other Latin American countries. Within this group, there is a large population of wealthy consumers, roughly 10 million people, representing the segment that is least sensitive to price and highly receptive to premium U.S. food and beverage products. Euromonitor projects that by 2040 Brazil's population will reach 218 million, with consumer expenditure increasing by 29 percent driven by an expanding middle class. The ageing population is strengthening long-term demand for health-oriented and functional products in one of the world's largest urban consumer markets.

Table 1: Advantages and Challenges

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

Source: FAS/Sao Paulo

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

Section II. Exporter Business Tips

Market Research

The Agricultural Trade Office (ATO) serves as the main resource for U.S. exporters interested in Brazil's market. The ATO provides market testing opportunities through promotional activities and offers valuable market intelligence services to companies, including a newly launched *Taste America* project, which enables low-cost consumer surveying of visa applicants. Exporters should establish direct connections with potential Brazilian buyers and consolidators, who can provide crucial insights on product viability, market dimensions, pricing strategies, distribution channels, and effective marketing approaches.

Local Business Customs and Trends

Brazil's food industry is highly developed and competitive, dominated by major multinational companies. U.S. food products typically struggle to compete on price with domestic Brazilian goods or products from Mercosur countries due to exchange rates and import tariffs. Thus, products marketed as unique are most likely to succeed at a premium price point in the Brazilian market.

Many Brazilian businesses expect exclusivity with business partners. Importers and/or retailers may seek agreements to be the only company, at least within a geographic area or for a certain timeframe, to provide a product. Due to the complexities of registering and clearing product, most retailers avoid direct importation. São Paulo, the country's economic powerhouse, accounts for approximately 30 percent of national GDP. The Port of Santos serves as the primary entry point for most new to market food and beverage products.

General Consumer Tastes and Trends

In urban centers like São Paulo and across Brazil's Southeast region, a growing number of consumers live in small apartments and are adjusting grocery shopping habits to suit their living spaces. Convenience stores are the fastest growing segment, expanding nine percent to reach $1.2 billion in 2025. Chains like Minuto Pão de Açúcar, a small footprint version of the larger grocery, are opening more locations to increase proximity to consumers in urban areas. Many urban consumers prefer to purchase frequently and in smaller quantities to reduce space devoted to food storage and to limit the need for advanced meal planning. This format is expanding directly into residential buildings to offer safety and convenience, while also adding seating areas so customers can eat in the store. Small local grocers are also using smaller packaging sizes to manage limited shelf space and meet daily shopping needs.

Supermarkets are responding to these habits by drawing consumers in with unique products unavailable in smaller footprint stores, such as health and wellness products. Retailers are changing store layouts to dedicate sections to items like lactose-free, gluten-free, sugar-free,

organic, and natural options. These changes match consumer demand for quality and ingredient transparency, making wellness an important factor for premium food products.

Table 2: Trade Show Schedule

Show Name	Show Date	Products Featured
Anuga Select Brazil	April 6-8, 2027	Consumer-Oriented Products
APAS Show	May 17-20, 2027	Consumer-Oriented Products
Food Ingredients South America	August 4-6, 2026	Ingredients and Additives
Nutri Ingredients Summit	April 14-15, 2027	Ingredients and Additives
PET South America	August 12-14, 2026	Pet Food
Victam Latam	September 14-16, 2027	Animal Feed
Naturaltech	TBD	Ingredients and Additives
Fenagra	May 11-13, 2027	Animal Feed
Siavis	August 4-6, 2026	Animal Feed

Source: FAS/Sao Paulo

Section III. Import Food Standards, Regulations and Procedures

Customs Clearance

Food imports are processed through the Integrated Foreign Trade System (SISCOMEX). Importers must obtain the required import licenses, register the Import Declaration (DI), pay applicable federal and state taxes, and submit products for inspection by MAPA and/or ANVISA, depending on the product category. Customs clearance is managed through a risk-based channel system (green, yellow, red, or gray), which determines the level of document and cargo inspection. For detailed procedures, see the Brazil FAIRS Country Report.

Documents Generally Required by the Country Authority for Imported Food

Documentation requirements vary according to the product category and the competent authority (MAPA or ANVISA). Depending on the product, importers may need import licenses, product registrations or notifications, phytosanitary certificates, certificates of analysis, certificates of origin, certificates of typicity, health certificates, and other supporting documents. Exporters should work closely with their Brazilian importer to confirm specific requirements before shipment.

Country Language Labeling Requirements

Food and beverage labels must be presented in Portuguese. Stickering is permitted, provided that all mandatory information is included and the sticker is affixed to the product. Labeling requirements include product identification, ingredient declaration, country of origin, importer information, expiration date, lot number, nutritional information, and any applicable warning statements. Additional requirements may apply depending on the product category. For detailed procedures, see the Brazil FAIRS Country Report.

Tariffs and FTAs

Brazil is a member of Mercosur, a customs union composed of Argentina, Brazil, Paraguay, and Uruguay. Goods traded among Mercosur member countries generally benefit from duty-free

treatment. Mercosur has also established preferential trade agreements with several associated countries providing reduced or duty-free tariff treatment for many products traded within the region.

The EU-Mercosur Agreement is currently undergoing ratification procedures in Brazil. Once implemented, the agreement is expected to reduce or eliminate tariffs on a wide range of agricultural products, potentially improving the competitiveness of European food and beverage exports in the market. For additional information on the status of the agreement and its potential impacts, please refer to GAIN EU-Mercosur Trade Agreement – The Brazilian Perspective and Agricultural Impacts. Exporters should consult the Ministry of Development, Industry, Trade and Services (MDIC), or Mercosur's tariff schedule for current tariff information.

Trademarks and Patents

The National Institute of Industrial Property (INPI) is responsible for registering patents, trademarks, and geographical indications in Brazil. Patent protection generally ranges from 15 to 20 years, depending on the patent type. Trademark registrations are valid for 10 years and may be renewed for successive periods. Additional information is available through INPI.

Table 3: Brazilian Government Regulators of Agricultural Goods

MAPA	ANVISA
Consumer-Oriented Products • Animal products: red meat and by-products; poultry meat and by-products; fish; seafood products; dairy products; eggs; and honey • Beverages: alcoholic and non-alcoholic (except energy drinks, non-dairy beverages such as soy, almond, etc.) • Fruits and vegetables: dried and fresh • Margarine	Consumer-Oriented Products • Food: all consumer-ready or processed products (except those under MAPA's authority) • Beverages: energy drinks; non-dairy beverages such as soy, almond, etc.
Intermediate Products • Wheat flour, planting seeds • Vegetable oils (soy, cotton, canola, corn, sunflowers)	Intermediate Products • Sugar and sweeteners; • Mineral water and flavored waters; • Additives, and other ingredients (excluding those under MAPA's authority) • Oils (excluding those under MAPA's authority)
Bulk Commodities • Wheat, grains, rice, soybean, cotton, tobacco, pulses, peanuts, flour	
Others • Pet food, feeds, and fodders • Plants and seeds • Animals, semen, and embryos	

Source: FAS/Sao Paulo

Please refer to the 2025 FAIRS Report, which outlines specific regulations or contact the ATO Sao Paulo at ATOSaoPaulo@usda.gov if you need any assistance.

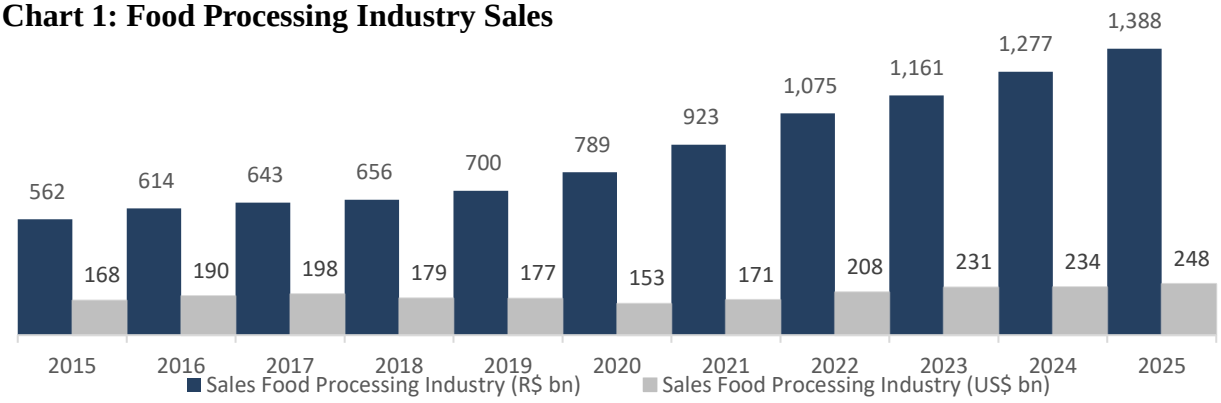
Section IV. Market Sector Structure and Trends

Both the retail and foodservice sectors in Brazil are highly fragmented. With the vast majority of food and beverage products sourced domestically, many businesses, even relatively large operations, have limited global sourcing teams and typically utilize importers and distributors to facilitate the bureaucracy of registering and clearing new products. Brazilian businesses tend to be risk-averse, starting with small trial purchases - often just a few pallets - and expanding only after market acceptance is proven. This preference for small initial volumes presents a challenge for U.S. exporters, who often hesitate to serve the Brazilian market under such conditions. To address this, many Brazilian businesses rely on consolidators (specialized importers) that manage labeling, regulatory compliance, and, most crucially, logistics of mixed-load containers for small-scale shipments. This model allows U.S. suppliers to access the market without the burden of adapting to local operational complexities, while meeting the needs of initially cautious buyers. Exporters should be mindful that slow starts are an inherent market challenge. With small volumes, and a long process for registering and clearing initial shipments, U.S. companies unfamiliar with the market may be unduly concerned that this indicates a lack of interest or potential. However, upfront patience while maintain respectful engagement with Brazilian business partners can unlock significant opportunities to access the robust market.

Food Processing Sector

Food processing is Brazil's strongest opportunity for U.S. ingredient exporters. According to ABIA, the sector generated $248 billion in 2025, up 8 percent, processing 62 percent of national agricultural output across roughly 42,000 companies, with exports reaching a record $67 billion. The growth is expected to continue, with the industry investing $20.7 billion in factories and innovation between 2023 and 2025. Since Brazil is largely self-sufficient in macro-ingredients, the opportunity lies in high-value micro-ingredients and additives that support clean-label, functional, and plant-based reformulation trends.

Chart 1: Food Processing Industry Sales



Source: ABIA

Animal Feed Sector

The Brazilian animal feed industry presents significant opportunities for U.S. exporters of specialty feed additives, particularly within the poultry and swine sectors. According to data from the National Syndicate of the Animal Feed Industry (Sindiracoes), poultry and swine feed production combined far exceeds that of the cattle sector. For instance, poultry feed production reached over 45 million tons and swine surpassed 22 million tons, while beef and dairy cattle feed production combined stood at 15 million tons. This massive volume drives a substantial demand for high-quality ingredients, as vitamins, mineral premixes, and additives account for 3 to 5 percent of total feed formulation. Post contacts estimate that the total potential market for these additives ranges around $2.5 billion.

Food Retail Sector

The Brazilian retail sector is a key channel in the food distribution system, characterized as fragmented but sophisticated and growing. According to the Brazilian Supermarket Association (ABRAS), supermarket sales reached $197 billion in 2024, representing 9.1 percent of the country's GDP. The industry includes a wide range of formats such as neighborhood stores, supermarkets, hypermarkets, cash-and-carry, and e-commerce. As innovation continues to drive the market, many companies are importing directly to offer the best products to Brazilian consumers. Warehouse clubs and local "atacarejos" are leading grocery sales, offering lower prices through bulk options and drawing shoppers from hypermarkets. Refer to the Food Retail Industry GAIN Report for more information.

Table 4: Top 10 Brazilian Retailers (2025)

Company	Headquarters	Sales Billion (US$)
Carrefour Group*	São Paulo	21.5
Assai	São Paulo	14.4
Grupo Mateus	Maranhão	6.5
Supermercados BH	Minas Gerais	3.8
Grupo Pão de Açúcar	São Paulo	3.5
Grupo Muffato	Paraná	3.1
Grupo Pereira/SDB	São Paulo	2.7
Mart Minas	Minas Gerais	2
Cencosud	São Paulo	2
Koch Hipermercado	Santa Catarina	1.8

Source: Brazilian Supermarket Association (ABRAS)

**The Carrefour Group in Brazil includes three different businesses: Atacadão representing 72% of the total sales; Mercado Carrefour with 22% of the sales and Sam's Club with is 6% of the sales*

Food Service Sector

According to the Brazilian Bars and Restaurants Association, Brazilian foodservice revenues reached $88.5 billion in 2025, representing a 0.9 percent growth. Small to medium independent operators dominate the market with 97.5 percent of outlets, while chains comprise just 2.5

percent. With high fragmentation, the 10 largest restaurant chains represent only 10 to 12 percent market share. Driven by shifting consumption habits and new digital formats, the foodservice sector in Brazil is expected to continue expansion in the short term. Please refer to the Food Service - HRI GAIN Report for more details.

Section V. Agricultural and Food Imports

Despite exchange rate volatility, Brazil has maintained its position as a major importer of agricultural products from the world and the largest importer in South America and presents opportunities for U.S. exporters (Table 5). In 2025, Brazil imported $17 billion of agricultural products and exported $154 billion. The United States is the fifth leading supplier of agricultural products to Brazil. In 2025, U.S. exports of agricultural and related products grew by 4 percent, reaching $925 million, led by fertilized eggs intended for incubation, dairy products, and ethanol.

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

Product Category	Brazil World Imports in 2025	Brazil Imports from the U.S. in 2025	U.S. Market Share (%)
Distilled Spirits	357	70	19.57
Tree Nuts	235	42	17.95
Tea	13	2	17.66
Condiments & Sauces	65	10	15.20
Soup & Other Food Preparations	415	36	8.59
Dairy Products	1,383	116	8.36

Source: Trade Data Monitor (TDM)

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

Partner Country	2022	%	2023	%	2024	%	2025	%
World	5,183	100	5,826	100	6,730	100	7,100	100
Mercosul [1]	2,017	39	2,309	40	2,636	39	2,510	35
EU 28 [2]	1,582	31	1,798	31	1,934	29	2,138	30
Chile	444	9	448	8	606	9	616	9
United States	278	5	299	5	334	5	415	6
China	216	4	214	4	314	5	354	5
Others	646	12	758	13	905	13	1,067	15

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

Table 7: Brazil Imports of Agricultural Products in 2025 (US$ Million)

	Imports from World	Imports from United States	U.S. Share (%)
Consumer-Oriented Products			
Dairy Products	1,383	116	8.36
Distilled Spirits	357	70	19.57
Tree Nuts	235	42	17.95
Soup & Other Food Preparations	415	36	8.59
Condiments & Sauces	65	10	15.20
Dog & Cat Food	34	7	21.55
Agricultural Related Products			
Seafood Products	1,521	8	0.50
Intermediate			
Essential Oils	245	79	32.42
Other Intermediate Products	372	73	19.48
Dextrins, Peptones, & Proteins	87	34	39.27
Vegetable Oils NESOI	976	17	1.75
Hides & Skins	28	15	55.25
Bulk			
Wheat	1,595	33	2.05
Other Bulk Commodities	67	3	3.91
Pulses	53	2	4.54
Cotton	3	2	85.34
Rapeseed	8	1	13.87

Source: Trade Data Monitor (TDM)

Section VI. Contacts And Further Information
SECTION V: KEY CONTACTS AND FURTHER INFORMATION

Ministry of Agriculture and Livestock (MAPA)
Esplanada dos Ministerios, Bloco D
70043-900, Brasilia, DF
Phone: +55 61 3218-2510/2468
Website: www.gov.br/agricultura/pt-br

Ministry of Development, Industry, Trade and Services (MDIC)
Foreign Trade Secretariat (SECEX)
Esplanada dos Ministerios, Bloco B
70068-900, Brasilia, DF
Phone: (61) 2028-1224/1205
Website: www.gov.br/mdic/pt-br/assuntos/comercio-exteriorh

Ministry of Finance (MF)
Brazilian Customs (Receita Federal)

Setor de Autarquias Sul (SAS), Quadra 06, Bloco O- Edíficio Órgãos Centrais
70070-917, Brasilia, DF
Phone: +55 61 3412-4155
Website: www.gov.br/receitafederal/pt-br

Ministry of Health (MS)
National Agency of Sanitary Surveillance (ANVISA)
Setor de Indústrias e Abastecimento (SIA), Trecho 5, Área Especial 57
71205-050, Brasilia, DF
Phone: +55 61 3462-6000
Website: www.gov.br/anvisa/pt-br

APPENDIX II: OTHER IMPORT SPECIALIST CONTACTS

Brazilian Food Processors' Association (ABIA)
Rua Butantã, 336, 3rd floor
05424-000, Sao Paulo, SP
Phone: +55 11 3030-1353
E-mail: abia@abia.org.br
Website: www.abia.org.br

Brazilian Food Ingredients and Additives Association (ABIAM)
Rua Hungria, 664, cj 51
01455-000 Sao Paulo, SP
Phone: +55 11 3034-3541
Email: abiam@abiam.com.br
Website: www.abiam.com.br

Agricultural Affairs Office
U.S. Embassy
Av. das Nações, Quadra 801, Lote 3
70403-900 Brasília, DF
http://www.fas.usda.gov
Phone: +55 61 3312-7000
Email: agbrasilia@usda.gov

U.S. Agricultural Trade Office
U.S. Consulate General
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Email: atosaopaulo@usda.gov

Attachments:

No Attachments