

Brazil Fruits And Vegetables - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 80 pages | Mordor Intelligence

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Report description:

Brazil Fruits And Vegetables Market Analysis

The Brazil fruits and vegetables market is expected to grow from USD 30.0 billion in 2025 to USD 31.42 billion in 2026 and is forecast to reach USD 39.59 billion by 2031 at 4.74% CAGR over 2026-2031. The market expansion is attributed to urbanization, heightened health consciousness, and sustained production enabled by diverse agro-climatic conditions. Strategic investments in irrigation systems, cold chain infrastructure, and digital farming technologies are enhancing productivity and minimizing post-harvest losses. The favorable exchange rates maintain export margins despite fluctuating transportation costs. Processing companies are implementing vertical integration strategies to secure raw material supply and optimize profit margins, which is transforming supply chain dynamics. Producers are deploying cost-reduction technologies and diversifying market presence due to input price volatility and uncertain trade policies.

Brazil Fruits And Vegetables Market Trends and Insights

Surging Fruit-Juice Export Contracts

Orange juice processors secured new multiyear contracts at premium prices, supported by a 36% increase in 2025-26 orange production to 314.6 million boxes. Export demand remained stable after the August 2025 United States tariff implementation, as juice concentrates and essential oils received exemptions. Processors invested in disease-resistant citrus varieties to protect against greening disease, which affects 50% of groves in Sao Paulo and Minas Gerais. Asian and Middle Eastern buyers

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established binding off-take agreements, expanding beyond traditional North American markets. The industry's vertical integration expanded, exemplified by Louis Dreyfus Company's 2024 retail brand launch. These developments provided the Brazil fruits and vegetables market with protection against commodity price fluctuations and international policy changes.

Accelerating Domestic Demand for Fresh-Cut Fruits and Vegetables

The Brazil fruits and vegetables market is experiencing growth due to changing consumer preferences and operational improvements. Urban households and institutional kitchens prefer washed, sliced, and ready-to-cook products that reduce preparation time and provide a nine-day shelf life under cold storage. Processing facilities near Sao Paulo operate double shifts, while new facilities in Minas Gerais serve interior cities. Restaurants and catering services are transitioning to value-added packages, reducing labor costs by up to 20% and increasing demand for leafy greens and root vegetables. Cold-chain improvements, supported by concessional loans, reduce post-harvest losses from previous levels of 35-40%. Medium-sized cooperatives are implementing audit compliance software to meet standardized good-manufacturing practices and food safety regulations. These market developments expand the customer base and strengthen relationships between processors and institutional buyers.

Inadequate Refrigerated Logistics and Rural Roads

Brazil's cold storage facilities are primarily located in coastal population centers, while agricultural production clusters are situated hundreds of kilometers inland. The poor condition of feeder roads increases transit time, and with only 12% of farm-gate trucks equipped with refrigeration, farmers must either accept lower prices or risk product spoilage during peak seasons. While government freight corridors prioritize bulk grain transportation, perishable goods compete for limited cold-chain capacity. Private investment concentrates in high-volume citrus production regions, creating regional disparities that limit market access for small-scale farmers in the Northeast. The Brazil fruits and vegetables market continues to lose 18% of annual production before reaching retail outlets due to inadequate specialized logistics infrastructure.

Other drivers and restraints analyzed in the detailed report include:

Diverse Agro-Climatic Zones Enabling Year-Round Output
Government Credit Lines for Horticulture Tech
Labor Shortages from Rural-Urban Migration

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Fruits dominated the market, accounting for 56.90% of the Brazil fruits and vegetables market share in 2025 through established citrus, mango, and grape supply chains that combine favorable climate conditions with extensive research investment. Citrus processors maintain price stability through long-term contracts, while banana production meets domestic demand with a consistent year-round supply. Tropical fruits, particularly mango and papaya, have capitalized on export opportunities during Northern Hemisphere off-seasons, generating higher unit revenue and increasing the market size at the farm level.

The vegetable segment, though smaller in value share, demonstrates the strongest growth potential with a projected 4.93% CAGR through 2031. According to the Food and Agriculture Organization, tomato production reached 4.1 million metric tons in 2023, supporting processing centers that produce sauces and ready-to-cook products for urban retail markets. Potato production benefits from coordinated planting schedules across three regions, ensuring a continuous supply for food service customers. Onion and garlic production, concentrated among family farms in the South and Northeast regions, benefits from the National Program for the Strengthening of Family Farming (PRONAF) extended credit programs, strengthening smallholder operations. The

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expansion of fresh-cut vegetable processing adds value to the segment and increases its contribution to the overall Brazil fruits and vegetables market size.

The Brazil Fruits and Vegetables Market Report is Segmented by Commodity (Fruits and Vegetables). The Report Includes Production Analysis (Volume), Consumption Analysis (Value and Volume), Export Analysis (Value and Volume), Import Analysis (Value and Volume), and Price Trend Analysis. The Market Forecasts are Provided in Terms of Value (USD) and Volume (Metric Tons).

List of Companies Covered in this Report:

Market Overview Market Drivers Market Restraints Regulatory Landscape Technological Outlook Value Chain / Supply Chain Analysis PESTLE Analysis List of Stakeholders

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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5.1 By Commodity (Production Analysis (Volume), Consumption Analysis (Volume and Value), Import Analysis (Volume and Value), Export Analysis (Volume and Value), and Price Trend Analysis)

5.1.1 Fruits

5.1.1.1 Citrus (Orange, Lemon, Lime, Tangerines, mandarins, and clementines)

5.1.1.2 Banana

5.1.1.3 Watermelon

5.1.1.4 Grapes

5.1.1.5 Pineapples

5.1.1.6 Mango

5.1.1.7 Apple

5.1.1.8 Papayas

5.1.1.9 Other Fruits (Cantaloupes and other melons, Avocados, Peaches and nectarines, Strawberries, etc.)

5.1.2 Vegetables

5.1.2.1 Tomato

5.1.2.2 Potato

5.1.2.3 Onion and Shallots

5.1.2.4 Garlic

5.1.2.5 Brassicas

5.1.2.6 Other Vegetables (Leafy Greens, Carrot, Beans, Eggplant, etc.)

6 Competitive Landscape

6.1 List of Stakeholders

6.1.1 Citrusuco S/A Agroindustria (Votorantim S.A. / Fischer S.A. Agroindustria)

6.1.2 Sucocitrico Cutrale Ltda (Cutrale Group)

6.1.3 Louis Dreyfus Company Brasil S.A.

6.1.4 Agricola Famosa S.A. (El Abuelo)

6.1.5 Itaqueira Agropecuaria S.A.

6.1.6 Agrodan Agroindustrial S.A. (UPL Limited)

6.1.7 Hortifruti Natural da Terra Ltda (Americanas S.A.)

6.1.8 GVS Fruit Company Ltda.

6.1.9 Ebraz Exportadora Ltda.

6.1.10 Fresh Quality Comercio Exterior LTDA

6.1.11 Berrygood

6.1.12 Smart Fruits Ltda

6.1.13 Braz Fruit International Ltda.

6.1.14 Linda Fruta

6.1.15 The Fruit Farm Group

7 Market Opportunities and Future Outlook

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