

Brazil Pet Food - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

Brazil Pet Food Market Analysis

The Brazil pet food market was valued at USD 9.32 billion in 2025 and estimated to grow from USD 10.03 billion in 2026 to reach USD 14.48 billion by 2031, at a CAGR of 7.62% during the forecast period (2026-2031). Robust growth is anchored in pet humanization, the gradual upgrade toward premium nutrition, and a companion-animal population that already exceeded 140 million dogs and cats in Brazil in 2022. Rapid online payment adoption is accelerating e-commerce penetration, while local agribusiness investment in novel proteins is easing supply pressures and supporting product innovation. Multinationals and domestic champions alike are deploying capacity. Mars opened a USD 90 million wet-food plant in Parana in June 2025 to capture premium wet-food demand and insulate supply chains.

Brazil Pet Food Market Trends and Insights

Pet Humanization Trends Driving Premiumization and Higher Per-Capita Spending

Brazilian pet owners increasingly treat companion animals as family members, driving sustained premiumization across nutrition categories that extends beyond traditional price-performance trade-offs. This behavioral shift manifests in growing demand for human-grade ingredients, organic formulations, and specialized life-stage nutrition that mirrors trends in developed markets but occurs within Brazil's unique socioeconomic context. Mars' strategic focus on wet food expansion through its new Parana facility directly targets this premiumization trend, as wet products command higher margins and align with humanization preferences for

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fresh, appetizing nutrition. The trend's durability stems from emotional bonding that proves resilient during economic downturns, distinguishing pet spending from other discretionary categories.

Growing Companion Animal Population Expanding Market Base and Volume Demand

Brazil adds around 2 million companion animals annually, expanding the addressable market base while creating sustained volume growth independent of per-capita consumption increases. This demographic expansion occurs through both natural population growth and rising pet adoption rates, particularly in urban areas where apartment living drives preference for smaller dog breeds and cats. The growth pattern favors dogs at a 3:1 ratio versus cats, reflecting cultural preferences and housing patterns that support canine ownership across income segments. Cat adoption accelerates in major cities as working professionals seek lower-maintenance companionship, creating opportunities for feline-specific nutrition products that currently represent an underdeveloped market segment. Population expansion also drives geographic market development as pet ownership spreads from traditional strongholds in Southeast Brazil to emerging regions in the Northeast and Center-West .

Punitive Tax Burden Limiting Affordability and Constraining Market Penetration

In 2024, Brazil's cascading tax structure creates a 50% effective burden on pet food retail prices through combined federal contributions (COFINS Contribution for the Financing of Social Security, PIS/PASEP Program of Social Integration (PIS), and Public Servant Asset Formation Program), import duties, state ICMS (Imposto sobre Circulacao de Mercadorias e Servicos) taxes, and municipal levies that compound throughout the distribution chain. The burden particularly impacts imported premium products and specialized nutrition categories where additional regulatory compliance costs compound the tax disadvantage. The tax reform exclusion of the pet industry from recent legislative proposals indicates continued political challenges in achieving relief, while state governments resist ICMS (Imposto sobre Circulacao de Mercadorias e Servicos) reductions that would impact their revenue streams. The constraint's persistence limits market expansion potential, forcing manufacturers to compete primarily on cost rather than innovation or quality differentiation.

Other drivers and restraints analyzed in the detailed report include:

Veterinary Prescription Recommendations Accelerating Therapeutic Diet Adoption
Digital Commerce and PIX Payments
Transforming Distribution and Market Accessibility
Economic Volatility and Income Inequality Restricting Premium Product Adoption

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

Segment Analysis

Food products maintain a commanding 68.54% Brazil pet food market size in 2025, reflecting their essential role in daily pet nutrition and established consumer purchasing patterns that prioritize complete nutrition solutions over supplementary products. Within this dominant segment, dry pet food represents the largest subsegment due to its convenience, shelf stability, and cost advantages, which align with Brazilian consumer preferences and retail infrastructure capabilities. The segment's strong performance is further supported by the growing trend of pet humanization, where pets are increasingly regarded as family members, leading to higher spending on quality Brazilian pet foods.

The fastest-growing subsegment, pet veterinary diets, expands at a 9.98% CAGR through 2031 as chronic pet diseases drive prescription nutrition demand and veterinary recommendations influence purchasing decisions. Pet nutraceuticals and supplements are capturing growing attention from health-conscious pet owners seeking preventive care solutions, while pet treats are benefiting from humanization trends that drive frequent purchase occasions and emotional bonding activities. Major pet food

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manufacturers are responding to this trend by developing innovative formulations that target specific health conditions while maintaining palatability. The segment is also benefiting from the increasing availability of these specialized diets through various distribution channels, particularly veterinary clinics and specialty pet stores, making them more accessible to pet owners across Brazil.

The Brazil Pet Food Market Report is Segmented by Pet Food Product (Food, Pet Nutraceuticals/Supplements, Pet Treats, and Pet Veterinary Diets), by Pets (Cats, Dogs, and Other Pets), and by Distribution Channel (Convenience Stores, Online Channel, Specialty Stores, Supermarkets/Hypermarkets, and Other Channels). The Market Forecasts are Provided in Terms of Value (USD) and Volume (Metric Tons)

List of Companies Covered in this Report:

Mars, Incorporated Nestle (Purina) BRF Global Premierpet Colgate-Palmolive Company (Hill's Pet Nutrition, Inc.) Grandfood Industria e Comercio Ltd. Special Dog Company Industria e Comercio de Alimentos Ltd. Farmina Pet Foods Holding N.V. General Mills Inc. ADM Virbac SA Alltech Inc. Diamond Pet Foods Inc. (Schell & Kampeter Inc.) Affinity Petcare Brasil Ltda. (Agrolimen S.A.) Petlove & Co. Comercio Eletronico S.A.

Additional Benefits:

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

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