



Food Industry

SPCG reading on bottlenecks and opportunities for mid-sized companies in the 2025-2026 cycle

SECTORAL – MANUFACTURING & FOOD

2026 Edition · Consolidated analysis

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IMPORTANT NOTICE

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SUMÁRIO EXECUTIVO

Principais conclusões

This sectoral report consolidates main indicators of Brazilian food and beverage industry in 2025, based on ABIA (Brazilian Food Industry Association), IBGE, CNI data.

- 01 Sector revenue R\$ 1.39 trillion in 2025, growth of 8.02% vs. 2024 – historic record (ABIA, March 2026).
- 02 Food and beverage industry represents 10.8% of Brazilian GDP in 2025.
- 03 Domestic market accounted for R\$ 1.02 trillion; retail R\$ 732 billion and food service the rest – segment returning to participation.
- 04 Real sales advanced 2.2% in 2025.
- 05 Exports totaled US\$ 66.73 billion (+0.7% vs. 2024); Asia was main destination (US\$ 27.4 bn); USA +9.2% (US\$ 4.9 bn).
- 06 Sector employs 2.12 million direct workers (+2.4% vs. 2024) and sustains 10.6 million in productive chain – 10.3% of all occupied workforce in Brazil.
- 07 Sector investment grew 6.8%, reaching R\$ 41.3 billion, with R\$ 26.7 billion directed to innovation, modernization, and technology adoption.

SECTION 01

Sector overview in 2025 – ABIA numbers

Record revenue and weight in GDP

R\$
1.39 tn

Total revenue 2025 (ABIA)

+8.02
%

Growth vs. 2024

10.8%

Of Brazilian GDP in 2025

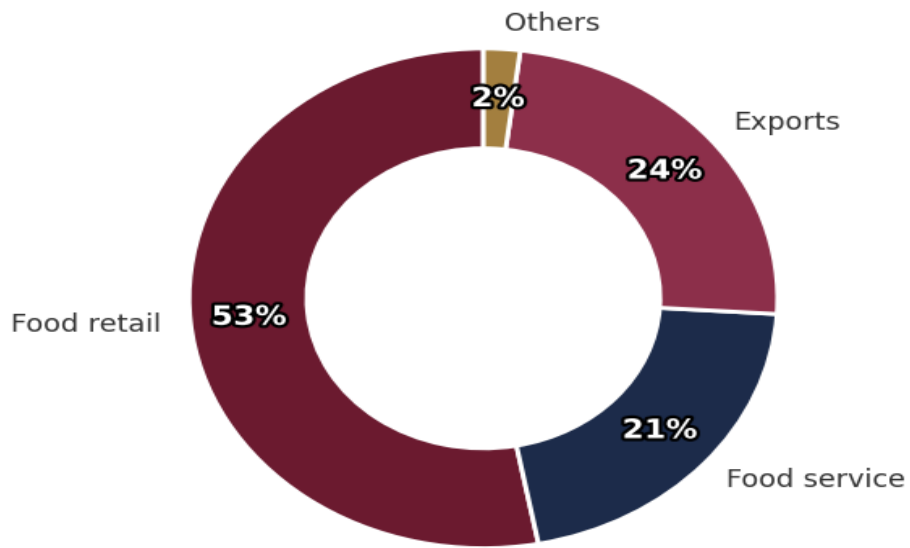
+2.2%

Real sales growth

According to ABIA (via Agência Brasil and InfoMoney, March 2026), total revenue of Brazilian food and beverage industry reached R\$ 1.39 trillion in 2025 – historic record, growth of 8.02% vs. 2024.

Revenue structure

Revenue composition — Food industry 2025 (%)



Note: composition estimated by SPCG from absolute values disclosed by ABIA.

SECTION 02

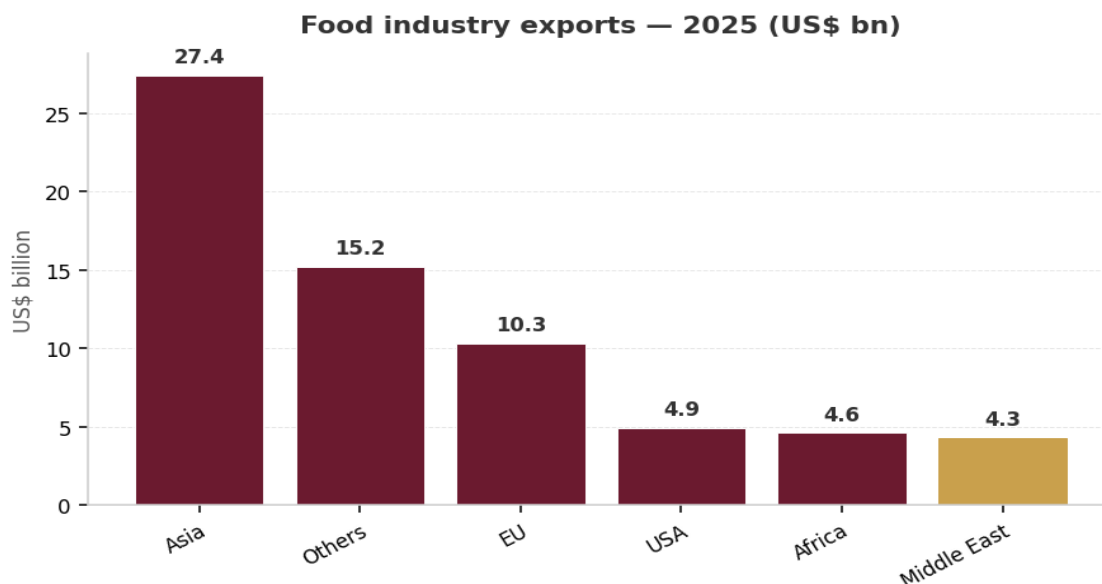
Domestic market vs. exports

Domestic market — R\$ 1.02 trillion

- Food retail: R\$ 732 billion
- Food service: ~R\$ 288 billion
- Recovery of food service was 2025 highlight.

Exports — US\$ 66.73 billion

Sector exports grew 0.7% in 2025, reaching US\$ 66.73 billion (ABIA, 2026). Distribution by destination:



Highlight was growth of +9.2% in exports to USA (ABIA).

SPCG reading: export/domestic market equation has direct strategic implication for mid-sized companies — export stability (+0.7%) combined with domestic market strength (+2.2% real) suggests mid-sized companies can specialize in domestic niches with better margin.

SECTION 03

Employment and weight in workforce

Direct employment and productive chain

2.12M

Direct workers (+2.4%)

+51k

New jobs created 2025

10.6M

Total including productive chain

10.3%

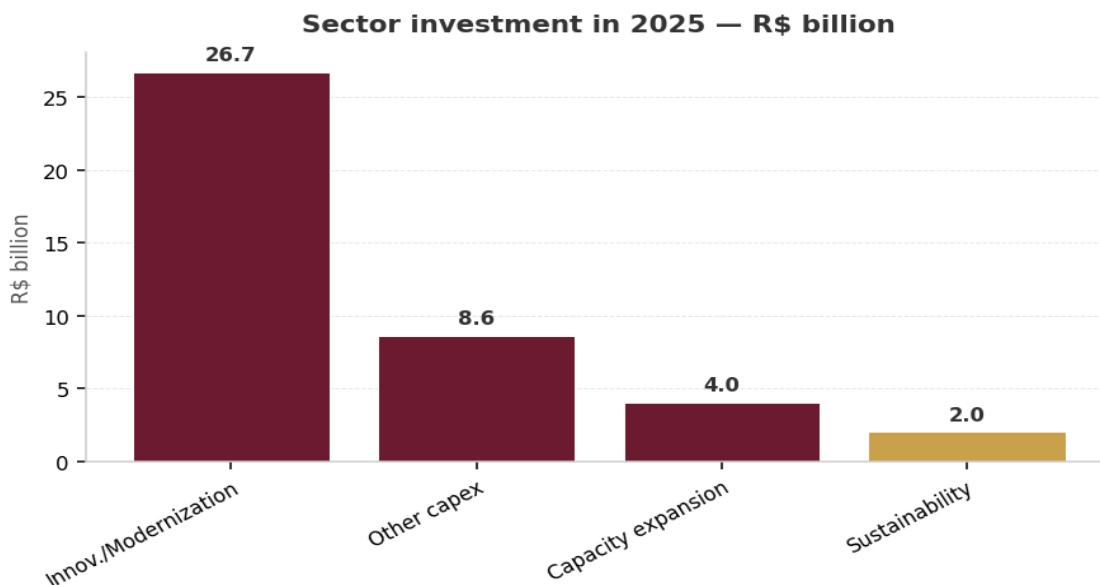
% of occupied workforce Brazil

According to ABIA and Portal da Indústria (March 2026), the direct food sector employed 2.12 million workers at end of 2025, with growth of 2.4% vs. 2024 – equivalent to 51 thousand new jobs created.

SPCG reading: employment dimension in sector has two practical implications for mid-sized companies: (a) high worker demand generates structural wage pressure; (b) sector is politically relevant.

SECTION 04

Investment in innovation and modernization



ABIA reported sector companies invested R\$ 41.3 billion in 2025, advance of 6.8% vs. 2024. Of these, R\$ 26.7 billion (65%) directed to innovation, modernization of industrial plants, and technology adoption.

What 'innovation and modernization' means in practice

- Production line automation
- Process digitization (ERP, MES, industrial IoT)
- R&D in premium and functional products
- Traceability and sustainability

SECTION 05

Operational bottlenecks

Input cost pressure

ABIA itself observes sector helped contain inflation in 2025 by absorbing relevant share of cost increases. This reflects structural situation: sector margins are pressured.

Qualified labor – structural bottleneck

- Industrial maintenance – electromechanical, automation, robotics
- PCP (Production Planning and Control)
- Operations management
- Quality and regulatory – professionals with food safety training
- Line automation specialists

Regulatory complexity

Sector operates under intense regulation – ANVISA, MAPA, state and municipal bodies.

SECTION 06

Opportunities for mid-sized companies

1. Premium and functional food

Category with largest expansion in 2025 — margins 2-3x higher than sector average.

2. Private label for large retailers

Large retail chains expand private label offerings. Fast scale but tight margin.

3. B2B food service (recovering segment)

Segment focused on delivery, dark kitchens, corporate food service.

4. Line automation — structural productivity gain

Line automation in mid-sized companies records typical payback of 12-18 months (SPCG estimate).

5. Partial vertical integration

Mid-sized groups with consolidated position evaluate partial vertical integration — capture of strategic raw material or own distribution.

SECTION 07

SPCG readings and strategic recommendations

1. Formalize plan for technical talent attraction and retention

Given qualified labor structural bottleneck, formalization of plan with career policy, internal training, and partnerships with regional technical schools offers relevant competitive differential.

2. Prioritize lean S&OP — 90 minutes per month

Sales and operations integration is high-ROI tool in sector.

3. Invest in line automation with highest payback

Focus on 1-2 lines with demonstrable 12-18 month payback.

4. Consider premium line launch if brand supports

Growth of margins in sector is in premium and functional.

5. Structure governance if still operating informally

Sector has large weight of family businesses.

How SPCG can help: our services of Operational Diagnostics, Lean S&OP Implementation, AI Process Automation, and Family Business Governance address the most relevant areas. Write to contato@spcg.com.br.

REFERENCES

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Macroeconomic and sectoral context

- IBGE. National Accounts 2025 (GDP of R\$ 12.7 trillion).
- CNI. Industrial Sondagem and qualified worker shortage research.
- SEBRAE. SME landscape and studies 2025.

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