

CHEESE AND ALTERNATIVES – BRAZIL – 2024

Price hike drives cost-effective and versatile options. Highlighting quality and healthy benefits is crucial, especially for premium and regional products.



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Report Content

Key issues covered in this Report

- Market Overview

EXECUTIVE SUMMARY

- What you need to know
- Analyst outlook for the cheese and alternatives category

Challenges

- High prices hinder consumption growth
 - Graph 1: Extended National Consumer Price Index (IPCA) – annual variation of the general index and the subgroups of cheese and requeijão, 2020-23
- Limited perception of value impacts the consumption of regional and international cheese
 - Graph 2: habits and attitudes toward cheese, by type of cheese consumed, 2024
- Consumers want plant-based options to taste like regular cheese

Opportunities

- Healthy options appeal to different consumer profiles
- Healthy options appeal to different consumer profiles
- Snack kits can increase consumption of creamy cheese as part of a snack between meals
- Cheese from animals that are not cows can gain more space by highlighting sustainable credentials

THE CONSUMER

Category overview and consumer profiles

- Mozzarella continues to be the most consumed type of cheese in Brazil
 - Graph 3: types of cheese consumed, 2024
- Gorgonzola stands out among international cheese
 - Graph 4: international types of cheese consumed, 2024
- AB consumers have more access to most cheese types and formats
 - Graph 5: types of cheese consumed, by socioeconomic group, 2024

Cheese consumption by type and format, including regional and international options

- Spreadable cream cheese gain space and has the potential to keep growing
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- Snack kits can increase consumption of creamy cheese as part of a snack between meals

Cheese and Alternatives – Brazil – 2024

- Despite large regional and artisanal production in the South and Southeast, the Northeast stands out in regional cheese consumption
 - Graph 6: types of cheese consumed, by region, 2024
- High prices and limited value perception impacts local consumption of regional cheese
 - Graph 7: habits and attitudes toward cheese, by type of cheese consumed, 2024
- Like coalho, other regional cheeses may pierce the bubble of local consumption
- Foodservice and social media can be allies in the promotion of regional cheese
- Young women are the main consumers of cheddar cheese
 - Graph 8: types of cheese consumer, by gender and age, 2024
- Cheddar cheese as an ingredient in homemade recipes or ready meals can boost consumption among young women

Format of cheese consumed and cheese usage and consumption

- Opportunities to create healthy cheese options for breakfast
 - Graph 9: cheese usage and consumption, 2024
- Create cheese types and formats usually consumed with breakfast in functional versions and with additional benefits
- Convenient options can gain space as an add-on to a finished dish
- Convenient options can gain space as an add-on to a finished dish
- In addition to parmesan, other types of cheese can bring indulgence to finished dishes
- Cheese that goes with alcoholic drinks can boost consumption among men 55+
 - Graph 10: cheese usage and consumption, by gender and age, 2024
- Products can indicate harmonization with alcoholic beverages

Experience and interest in cheese varieties

- Functional cheese with added vitamins and minerals has potential among older generations
- Functional cheese with added vitamins and minerals has potential among older generations
 - Graph 11: experience and interest in cheese varieties – “I haven’t tried this, but am interested in trying,” 2024
- Functional cheeses are still rare in Brazil and abroad
- Functional cheeses are still rare in Brazil and abroad
- Women aged 55+ are more likely to look beyond calcium and be interested in cheese with high protein content
 - Graph 12: experience and interest in cheese varieties – high protein cheese, by gender and age, 2024
- Dairy products generally focus on high calcium content for women aged 55+, but cheese can offer more protein
- Chestnuts, walnuts and almonds can add benefits to high protein cheeses
- With format and flavor variation, the category can offer sweet options that please different age groups
- With format and flavor variation, the category can offer sweet options that please different age groups
- For older consumers: traditional combinations of cheese and sweets with premium ingredients
- For younger consumers: cream cheese with innovative sweet flavors

Plant-based cheese perception

- Plant-based options should seek to taste like regular cheese

- Graph 13: plant-based cheese perception, 2024
- Plant-based options should highlight features similar to regular cheese
- Plant-based options should highlight features similar to regular cheese
- Plant-based cheese with innovative flavors can appeal to Generation X
 - Graph 14: plant-based cheese perception, by generation, 2024
- Innovative flavors combined with healthy claims can boost interest among Gen Xers
- Sustainable credentials can appeal to LGBTQ+ consumers
 - Graph 15: habits and attitudes toward cheese, by LGBTQ+ identity, 2024
 - Graph 16: experience and interest in plant-based cheese, by LGBTQ+ identity, 2024
- Plant-based cheese with sustainable credentials in Brazil focuses on recycling and recyclable packaging
- Globally, ethical and sustainable claims in plant-based cheese are more varied

Habits and attitudes towards cheese

- Social media can encourage Gen Zs to use cheese as an ingredient
- Social media can encourage Gen Zs to use cheese as an ingredient
 - Graph 17: cheese usage and consumption, by generation, 2024
 - Graph 18: habits and attitudes towards cheese, by generation, 2024
- Brands can get inspired by recipes that are social media trends
- Cheese from animals that are not cows can gain more space by highlighting sustainable credentials
 - Graph 19: experience and interest in cheese from animals that are not cows, by habits and attitudes towards cheese, 2024
- National goat and buffalo cheese can gain space by highlighting sustainable claims as well as artisanal and family production
- International goat and buffalo cheese that brings ethical and sustainable claims

KEY PLAYERS

Launches and innovations

- Category invests in affordable launches
- Levitare invests in on-the-go cheese
- Large brands continue to invest in plant-based cheese

Marketing campaigns and actions

- Vigor campaign uses open TV and TikTok to invite consumers to prepare cheese snacks
- Cheese is highlighted by fast-food chains

THE MARKET

- Rising cheese and requeijão prices impact consumption
 - Graph 20: IPCA – annual variation of the general index and the subgroups of cheese and requeijão, 2020-23

- Front of pack alerts can impact consumers who seek healthier cheese options
- Category seeks certifications and titles of national and international recognition to add value to Brazilian cheeses

APPENDIX – MARKET SIZE AND MARKET SHARE

- Market size in retail value
- Market size in volume
- Market share in value
- Market share in volume

APPENDIX – DEFINITION, METHODOLOGY AND ABBREVIATIONS

- Report definition
- Methodology
- Abbreviations

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