

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

- Ready meals have the challenge of boosting consumption frequency
- Some subcategories have greater difficulty in attracting consumers
- Price is one of the main consumption barriers
- · Health concerns and use of preservatives affect the category

Brazil's ready meals market still has a long way to go in order to expand its participation in the daily life of consumers, both in terms of its subcategories' sales performance and overall consumption frequency. The main consumption barriers include price and seasoning. Brazilian consumers have an interest in customizing their meals and using their own seasoning. In addition, healthy trends and the diversification of formats should also impact the market.



"To boost sales and consumption frequency in the ready meals category, brands and companies need to diversify the options of products offered. In addition to healthier alternatives made with ingredients well-known by consumers, it is essential to offer a greater variety of flavors, local and international and convenient formats, the main consumption driver when it comes to ready meals."

Ana Paula Gilsogamo, Food Buy this report now nd Drink Specialist

| Visit | store.mintel.com |
|----------|----------------------|
| EMEA | +44 (0) 20 7606 4533 |
| Brazil | 0800 095 9094 |
| Americas | s +1 (312) 943 5250 |
| China | +86 (21) 6032 7300 |
| APAC | +61 (0) 2 8284 8100 |

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Table of Contents

OVERVIEW

- What you need to know
- Definition

EXECUTIVE SUMMARY

- Challenges
- Ready meals have the challenge of boosting consumption frequency

Figure 1: Consumption frequency - Brazil, April 2019

Some subcategories have greater difficulty in attracting consumers

Figure 2: Consumption - Brazil, April 2019

- Price is one of the main consumption barriers
- Health concerns and use of preservatives affect the category
- Opportunities
- Customization of flavors and spices can attract new
 consumers
- · Shareable ready meals can compete with delivery services
- Gourmet options can encourage consumers who seek indulgence to pay more for full ready meals
- Brazilian regional food options can attract Millennials, the main consumers of the category
- What we think

MARKET DRIVERS

· High food prices should impact eating habits

Figure 3: Brazil's National Consumer Price Index, eating at home and eating out, monthly variation and accumulated in 12 months, June 2018 to June 2019

- Aging population and health problems encourage the search for healthier alternatives
- Smaller families trend can impact cooking habits
- The gender gap is still big when it comes to household tasks
- Ban on plastic straws raises the question of sustainability
- Food delivery apps and ecommerce services can affect eating habits

KEY PLAYERS – WHAT YOU NEED TO KNOW

- Brands diversify their products with new launches
- Consumption of meal kits is small but has the potential to grow

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

| | Visit | store.mintel.com |
|--|----------|----------------------|
| | EMEA | +44 (0) 20 7606 4533 |
| | Brazil | 0800 095 9094 |
| | Americas | +1 (312) 943 5250 |
| | China | +86 (21) 6032 7300 |
| | APAC | +61 (0) 2 8284 8100 |

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



 Pieces of meat add value to instant noodles and heat up the Asian market

MARKETING CAMPAIGNS AND ACTIONS

- Sadia focuses on quick-to-prepare and shareable products
 Figure 4: Sadia campaign
- Brands invest in 100% vegetable burgers that offer "real meat" taste
 - Figure 5: Futuro Burger campaign
- Seara launches rotisserie line of ready-made meals
 Figure 6: Seara Rotisserie campaign
- Catupiry launches a premium line of frozen pizzas
 Figure 7: Catupiry Pizza Artesanal (Handmade Pizza)
- Vapza invests in its own ecommerce channel
- Nissin offers new flavors of its creamy instant noodles
 Figure 8: Nissin campaign

WHO'S INNOVATING?

 Consumption of meal kits is small but has the potential to grow

Figure 9: Launches of meal kits related to the total launches in the category, top five countries and Brazil, January 2015 to June 2019

Adding nutritional/functional benefits can boost consumption

Figure 10: Global launches of ready meals with function claim, and/or beauty enhancement, June 2015 to June 2019

CASE STUDIES

- Pieces of meat add value to instant noodles and heat up the Asian market
- Kit offers quick scrambled eggs preparation
 Figure 11: Just Crack an Egg campaign

THE CONSUMER - WHAT YOU NEED TO KNOW

- Chilled/frozen pizza has the challenge of boosting consumption frequency
- Shareable ready meals can compete with delivery services
- Customization of flavors and seasonings can appeal to consumers
- Longer shelf-life can appeal to DE consumers
- Brazilian regional food options can attract Millennials, the main consumers of the category

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

| Visit | store.mintel.com |
|----------|----------------------|
| EMEA | +44 (0) 20 7606 4533 |
| Brazil | 0800 095 9094 |
| Americas | +1 (312) 943 5250 |
| China | +86 (21) 6032 7300 |
| APAC | +61 (0) 2 8284 8100 |

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



 There is space for private label ready meals, especially in the South-East

CONSUMPTION AND CONSUMPTION FREQUENCY

Chilled/frozen pizza has the challenge of boosting consumption frequency

Figure 12: Consumption - Brazil, April 2019

Figure 13: Consumption frequency, chilled/frozen pizza – Brazil, April 2019

 Chilled ready-to-eat salads and frozen vegetables need to increase market penetration

Figure 14: Consumption frequency, chilled ready-to-eat salad and frozen vegetables – Brazil, April 2019 Figure 15: Chipotle Lifestyle Bowls Menu

 Chilled full meals with common Brazilian dishes can appeal to AB consumers

Figure 16: Consumption, by socioeconomic group – Brazil, April 2019

CONSUMPTION REASONS

- Shareable ready meals can compete with delivery services
 Figure 17: Consumption reasons Brazil, April 2019
- To attract women aged 55+, brands could invest in indulgent individual portions

Figure 18: Consumption reasons, by gender and age group – Brazil, April 2019

CONSUMPTION BARRIERS

Customization of flavors and seasonings can attract consumers

Figure 19: Consumption barriers – Brazil, April 2019 Figure 20: Vapza line

 Clean labels can impact current and potential consumers, fighting the perception of high usage of preservatives

CHOICE DRIVERS

Gourmet options can encourage consumers who seek indulgence to pay more for full ready meals

Figure 21: Choice drivers – Brazil, April 2019

 Frozen/chilled sandwiches/wraps/ready-made tapiocas can invest in healthy claims to boost consumption

Figure 22: Choice drivers, by frozen/chilled sandwiches/wraps/ready-made tapiocas – Brazil, April 2019

Longer shelf-life can appeal to DE consumers

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

| Visit | store.mintel.com |
|----------|----------------------|
| EMEA | +44 (0) 20 7606 4533 |
| Brazil | 0800 095 9094 |
| Americas | +1 (312) 943 5250 |
| China | +86 (21) 6032 7300 |
| APAC | +61 (0) 2 8284 8100 |

Ready Meals - Brazil - August 2019

Report Price: £3265 | \$4495 | €3940

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Figure 23: Choice drivers, long shelf-life as the first choice, by socioeconomic group – Brazil, April 2019

CONSUMPTION DRIVERS

 Ready meals subscription services can invest in internationally inspired flavors

Figure 24: Consumption drivers, by interest in subscription

services - Brazil, April 2019

Figure 25: Takeout Kit

Figure 26: Japan Candy Box

 Brazilian regional food options can attract Millennials, the main consumers of the category

Figure 27: Consumption drivers, by generation – Brazil, April 2019

Figure 28: Caixa Colonial video

Restaurant-brand ready meals attract those aged 16-34

Figure 29: Consumption drivers, choice drivers and habits and attitudes toward ready meals, by age – Brazil, April 2019
Figure 30: Chick-fil-A

HABITS AND ATTITUDES AND PERCEPTIONS TOWARD READY MEALS

 There is space for private label ready meals, especially in the South-East

Figure 31: Habits and attitudes toward ready meals, by region – Brazil, April 2019

 Options for consumption between meals can invest in flavors inspired by street food to attract men

Figure 32: Habits and attitudes toward ready meals, by gender – Brazil, April 2019

 Greater variety of sizes for different occasions and easy storage matter to consumers in the South region

Figure 33: Consumption drivers, choice drivers and habits and attitudes toward ready meals, by region – Brazil, April 2019

APPENDIX – ABBREVIATIONS

Abbreviations

APPENDIX - MARKET SIZE AND FORECAST

Market size

Figure 34: Retail sales of ready meals, by value, Brazil, 2014-19

Figure 35: Retail sales of ready meals, by volume, Brazil, 2014-19

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

| Visit | store.mintel.com |
|----------|----------------------|
| EMEA | +44 (0) 20 7606 4533 |
| Brazil | 0800 095 9094 |
| Americas | +1 (312) 943 5250 |
| China | +86 (21) 6032 7300 |
| APAC | +61 (0) 2 8284 8100 |



About Mintel

Mintel is the **expert in what consumers want and why.** As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit mintel.com.