

Executive summary

Strategies to unlock the Brazilian market of plant-based meats



PLANT-BASED BREADED BEEF - N. OVO



AUTHOR

Camila Lupetti

RESEARCH

Consumoteca

CONSULTING

Consumoteca

REVISION

Gustavo Guadagnini
Raquel Casselli
Vinícius Gallon

PUBLISHER

Tikinet

DESIGN

Fabio Cardoso

INTERNATIONAL CATALOGING IN PUBLICATION - CIP	
L965	Lupetti, Camila Strategies to unlock the Brazilian Market of plant-based meats: executive summary. / Camila Lupetti. Introduction of Gustavo Guadagnini. – São Paulo: Tikibooks; Good Food Institute Brasil, 2025. E-Book: PDF, 7 p.; IL. Color Research carried out by Consumoteca. See the full publication in Portuguese on our website: https://gfi.org.br/resources/pesquisa-de-categoria/ ISBN 978-85-66241-43-3 1. Food. 2. Food Supply Chain. 3. Food Technology. 4. Food Consumption. 5. Plant-Based Meats. 6. Alternative Proteins. 7. Plant-Based Meat Market. 8. Plant-Based Meat Consumption. 9. Market Research. 10. Data Analysis. 11. Report. I. Title. II. Executive summary. III. Strategies to unlock the Brazilian plant-based meat market. IV. Brazilians and food. V. Meat and vegetarianism. VI. Plant-based meats. VII. Uncovering successful categories. VIII. Strategic directions for the plant-based meat category. IX. GFI Brazil recommendations. X. Guadagnini, Gustavo. XI. GFI/Brasil. CDD 664
CATALOGING PREPARED BY REGINA SIMÃO PAULINO – CRB 6/1154	



PLANT-BASED HAMBURGER - INCRÍVEL!

In Brazil, the plant-based analog meat category continues to face challenges related to consolidation. Despite recent growth, reaching R\$1.1 billion according to Euromonitor data—these products are still widely perceived as products for vegetarians and vegans, not as appealing options for meat eaters

To explore how this category can expand its market share, this study combined three complementary methodologies: desk research (synthesis of existing data and research), in-depth interviews with consumers across a range of profiles, and interviews with experts from other food and beverage categories that successfully overcame similar growth challenges.

1. Main conclusions

The analysis combined cultural perspectives, consumer perceptions, and insights from other food categories that have undergone consolidation in the market. The results reveal both the tensions and barriers that shape Brazilians’ relationship with plant-based meats, as well as the strategic factors that can inform their expansion, summarized in the Success Categories Matrix.

1.1. Insights on Brazilian consumers

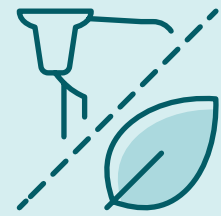
The starting point of the analysis is to understand Brazilians’ cultural relationship with food. Food is not just nutrition: it is central as a source of pleasure, family unity and social identity. In this context, flavor—directly associated with seasoning—is the main criterion for food choice, above any technical or nutritional property.

Within this cultural logic, meat plays a central role. For most consumers, it is synonymous with protein, strength and satiety. A meatless meal is perceived as incomplete, both nutritionally and symbolically. Meat consumption also relates to aspects of social status and belonging: participating in a barbecue, for example, is more than eating; it is about reinforcing collective bonds. Thus, meat on the plate is equivalent to familiarity, pleasure and cultural identity.

This background helps explain why vegetarianism and veganism face barriers in Brazil. In a context of higher individualism and pursuit of immediate satisfaction, consumers often associate these practices with imposition, renunciation or restriction—precisely the opposite of the idea of pleasure that guides food consumption. The perception of “moral superiority” attributed to those who forgo meat reinforces this distancing.

As for plant-based meats, this cultural background shapes perception of the category: the products are seen as exclusive for vegetarians/vegans or as a “gateway” for those who want to fully embrace this diet. This restricts its acceptance by the general public, who do not identify with this narrative.

In addition, there arise *practical barriers*



Nutritional skepticism

Many believe that plant-based meats do not provide protein or satiety equivalent to animal meat.



Taste concerns

There is a prevailing notion that these products are tasteless, unseasoned or artificial.



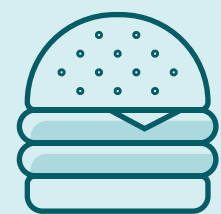
Price perception

The perception of a higher cost compared to animal meat weighs against frequent consumption.



Limited availability

Products are still not readily available in traditional retail outlets.



Association with snacks

Hamburgers and other processed foods dominate the portfolio, which hinders the introduction of these foods to Brazilian daily dishes.

In summary, insights on consumers show a mismatch between the current positioning of the category and the cultural and practical expectations of the public. To gain scale, it is necessary to reverse the perception of niche and present plant-based meats as legitimate protein options that can deliver pleasure, nutrition and convenience in everyday life.

1.2. Insights from other categories

The analysis of categories that have consolidated in the Brazilian market—such as non-alcoholic beer, protein drinks, condensed milk and infant formula—showed that success depended on a set of combined factors. These factors were summarized in the Strategic Success Categories Matrix, composed of seven key elements:

- 1 - Addressing an emerging tension of the time.
- 2 - Communicating functional and emotional benefits.
- 3 - Defining clear consumption occasions and formats.
- 4 - Investing in massive marketing and exposure.
- 5 - Choosing strategic influencers to amplify the message.
- 6 - Initially focusing on public with greater power of experimentation.
- 7 - Ensuring that the product is easily accessible and purchasable.

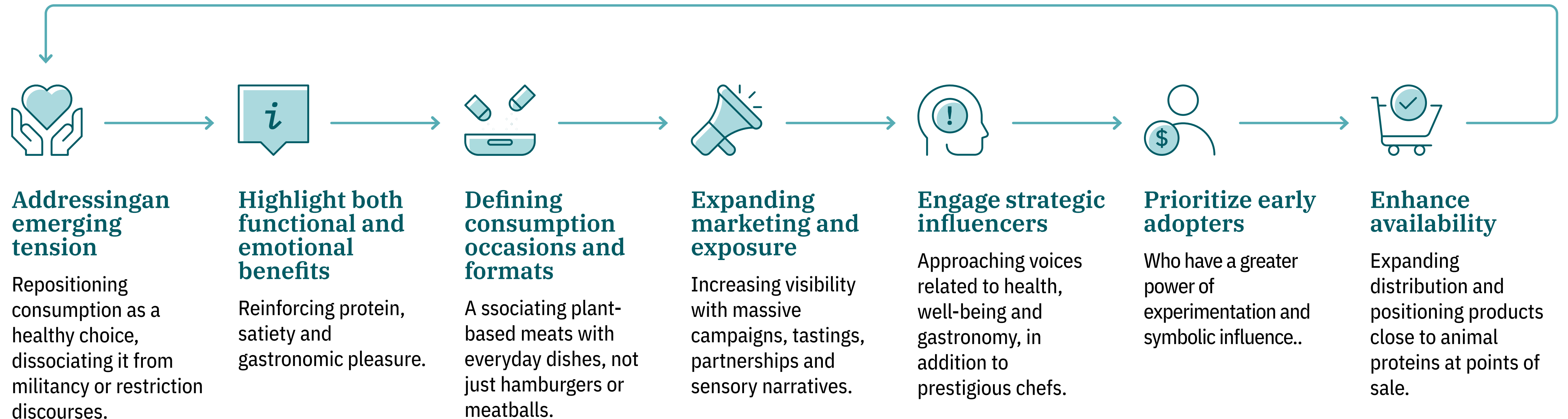
This matrix serves as a guide to assess current gaps and identify the adjustments needed so plant-based meats follow a similar consolidation trajectory.



PLANT-BASED BREADED CHICKEN - N.OVO

2. Strategic Recommendations

Based on the cultural analysis of consumers and the insights from the Success Matrix, seven priority guidelines were defined to unlock the plant-based meat market in Brazil:



It is worth noting that these guidelines do not constitute one-size-fits-all methods. Each brand will need to interpret them considering its identity, portfolio and target public. As has occurred in other successful categories, different narratives can coexist and complement one another: some brands can emphasize healthfulness and convenience attributes, others can reinforce gastronomic pleasure or innovation, while others can leverage accessibility and everyday life. It is essential that each company translates the guidelines into its own and consistent narratives that can engage with the tensions and desires of its consumers..



See the full publication in Portuguese on our website:

[Access publication](#)

Alexandre Cabral
EXECUTIVE VICE PRESIDENT

Alysson Soares
POLICY MANAGER

Amanda Leitolis, Ph.D.
SCIENCE AND TECHNOLOGY SPECIALIST

Ana Carolina Rossettini
DEVELOPMENT MANAGER

Ana Paula Rossettini
HUMAN RESOURCES ANALYST

Bruno Filgueira
CORPORATE ENGAGEMENT ANALYST

Camila Nascimento
OPERATIONS AND FINANCE ANALYST

Camila Lupetti
CORPORATE ENGAGEMENT SPECIALIST

Cristiana Ambiel, MS.
SCIENCE & TECHNOLOGY DIRECTOR

Fabio Cardoso
COMMUNICATION SPECIALIST

Gabriela Garcia, MS.
POLICY ANALYST

Gabriel Mesquita
CORPORATE ENGAGEMENT ESG ANALYST

Graziele Karatay, Ph.D.
SCIENCE AND TECHNOLOGY SPECIALIST

Guilherme de Oliveira
CORPORATE ENGAGEMENT SPECIALIST

Gustavo Guadagnini
PRESIDENT

Isabela Pereira
SCIENCE & TECHNOLOGY ANALYST

Julia Cadete
OPERATIONS ANALYST

Karine Seibel
OPERATIONS AND HR MANAGER

Lorena Pinho, Ph.D.
SCIENCE & TECHNOLOGY SPECIALIST

Luciana Fontinelle, Ph.D.
SCIENCE & TECHNOLOGY SPECIALIST

Lívia Brito, MS.
COMMUNICATION ANALYST

Manuel Netto
POLICY ANALYST

Mariana Bernal, MS.
POLICY ANALYST

Mariana Demarco, MS.
SCIENCE & TECHNOLOGY ANALYST

Natalia Figueiredo
COMMUNICATION ANALYST

Patrícia Santos
EXECUTIVE ASSISTANT

Raquel Casselli
CORPORATE ENGAGEMENT DIRECTOR

Sabrina Yamamoto
SCIENCE & TECHNOLOGY INTERN

Vinícius Gallon
COMMUNICATION MANAGER



All work conducted by GFI is offered free of charge to society, and we are only able to accomplish it because we have the support of our family of donors. We operate to maximize donations from our community of supporters, always striving for the highest efficiency in the use of resources.

 [GFI.ORG.BR](https://gfi.org.br)

 GFIBR@GFI.ORG

 [INSTAGRAM](#)

 [TIKTOK](#)

 [YOUTUBE](#)

 [LINKEDIN](#)

Help us build a food chain
that is more equitable, safe
and sustainable.

[Donate to GFI Brazil](#)