



Global Brazil Nut Market

Market size, segmentation, competitive landscape and outlook

2021-2031

September 2026

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Market at a glance

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Indicator	Value
Market size (2025)	USD 536.4 m
Forecast (2031)	USD 746.8 m
CAGR (2021-2031)	5.7%
Study period	2021-2031
Largest region	Europe · 36.8%
Fastest-growing region	Asia-Pacific · 7.4%
Market concentration	Low
Licence	Individual / Company

The global Brazil nut market reached USD XXX million in 2025 and will advance to USD XXX million by 2031, expanding at a CAGR of XX%. Europe accounted for XX% of market value, supported by established edible-nut consumption, premium organic retail and strong import infrastructure, while Asia-Pacific will record the fastest regional CAGR at XX%. Supply remains anchored in wild Amazonian collection, with Bolivia contributing XX% of global kernel production in 2023/24. Demand growth is shifting value toward certified kernels, consumer-ready packs, traceable ingredients and Brazil nut oil for premium food and personal-care formulations.

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Executive summary

The global Brazil nut market reached USD XXX million in 2025 and will advance to USD XXX million by 2031, expanding at a CAGR of XX%. Europe accounted for XX% of market value, supported by established edible-nut consumption, premium organic retail and strong import infrastructure, while Asia-Pacific will record the fastest regional CAGR at XX%. Supply remains anchored in wild Amazonian collection, with Bolivia contributing XX% of global kernel production in 2023/24. Demand growth is shifting value toward certified kernels, consumer-ready packs, traceable ingredients and Brazil nut oil for premium food and personal-care formulations.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- The global Brazil nut market generated USD XXX million in 2025 and will reach USD XXX million in 2031.
- Global production totaled XXX metric tons on a kernel basis in 2023/24 and was projected at XXX metric tons for 2024/25 by the International Nut and Dried Fruit Council.
- Bolivia supplied XX% of global kernel production in 2023/24, compared with XX% for Peru and XX% for Brazil.
- Brazil recorded XXX metric tons of Brazil nut extraction and R\$XXX in primary production value in 2023.
- Brazil exported XXX metric tons of in-shell and shelled Brazil nuts worth USD XXX million in 2024.
- Whole kernels represented XX% of global market value in 2025, reflecting their premium realization in snack, retail and confectionery applications.
- Conventional products retained XX% of 2025 sales, while organic Brazil nuts will expand at a XX% CAGR through 2031.
- Europe led global demand with a XX% share in 2025; Asia-Pacific will grow fastest at XX% annually.

Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

Global Brazil Nut Market Trends and Growth Drivers

Brazil nuts combine an unusually concentrated production base with a geographically diverse consumer market. Commercial harvesting depends on intact Amazonian forest systems in Bolivia, Peru and Brazil, making forest access, collector participation, flowering conditions and post-harvest logistics as important as conventional agricultural inputs.

Demand is evolving from bulk mixed-nut use toward a wider value ladder that includes certified whole kernels, portion-controlled snacks, organic ingredients, cold-pressed oil and community-origin products. This transition raises the value obtainable from each crop while increasing requirements for traceability, moisture control, laboratory testing and consistent grading.

The market's central tension is between resilient premium demand and variable physical supply. Processors with multi-origin procurement, working-capital depth and advanced quality systems can protect service levels, whereas buyers dependent on spot purchases face stronger price and availability swings.

Growth drivers

Premium healthy-snacking demand

Brazil nuts occupy a premium position in mixed-nut assortments because of their distinctive size, texture and nutrient profile. Brand owners are increasing inclusion in portion-controlled packs and clean-label snack mixes, lifting both kernel demand and average selling prices.

Selenium-led functional positioning

High natural selenium content gives Brazil nuts a differentiated proposition in functional nutrition. Retailers and nutrition brands are using controlled serving formats and educational packaging to convert this attribute into repeat purchases without relying on fortified formulations.

Organic and traceable sourcing

Organic certification, fair-trade programs and documented community sourcing support premium pricing and retailer acceptance. Traceability also strengthens the connection between Brazil nut consumption, standing-forest conservation and indigenous or traditional livelihoods.

Plant-based formulation growth

Manufacturers are incorporating Brazil nut ingredients into dairy alternatives, nut butters, bakery products and gluten-free formulations. Broken kernels, flour and press cake allow formulators to obtain characteristic flavor and nutritional value at a lower input cost than premium whole kernels.

Brazil nut oil premiumization

Cold-pressed Brazil nut oil is gaining value in facial oils, hair treatments, soaps and premium culinary products. This creates an additional revenue stream for processors and improves utilization of kernels that do not meet whole-kernel visual grades.

Processing and quality-control investment

Electronic sorting, controlled drying, improved storage and rapid aflatoxin testing increase export-grade recovery. These investments reduce rejected lots, widen access to regulated markets and stabilize buyer relationships.

Digital specialty-food distribution

Online retailers give Brazil nut suppliers access to consumers beyond established natural-food stores. Subscription packs, direct-to-consumer brands and cross-border marketplaces are particularly important in Asian markets where conventional supermarket distribution remains limited.

Restraints

Wild-crop supply volatility

Commercial supply depends predominantly on naturally occurring trees and seasonal forest collection rather than managed plantations. Rainfall, flowering conditions, river access and collector economics can produce sharp year-to-year movements in available volume and kernel size.

Aflatoxin compliance burden

Moisture exposure between collection and drying raises the risk of fungal contamination and export rejection. Suppliers serving Europe and other tightly regulated markets must invest in sampling, laboratory testing, sorting and segregated storage.

Remote-origin logistics

Collection territories in Pando, Madre de Dios, Acre, Amazonas and Pará depend on long river or road movements before primary processing. Fuel, working-capital and storage constraints widen procurement spreads and reduce the competitiveness of smaller organizations.

Competing tree-nut substitution

Retailers can adjust mixed-nut recipes toward almonds, cashews or walnuts when Brazil nut prices rise or supply tightens. This substitution caps volume growth in price-sensitive mainstream assortments, although premium whole-kernel demand remains more resilient.

Consumption-frequency constraints

The high selenium concentration encourages portion-controlled consumption and limits Brazil nuts' role as an unrestricted everyday snack. Growth therefore depends on household penetration, ingredient applications and premium value rather than large serving sizes.

Brazil Nut Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Premium healthy-snacking demand	XXX	XXX	XXX
Selenium-led functional positioning	XXX	XXX	XXX
Organic and traceable sourcing	XXX	XXX	XXX
Plant-based formulation growth	XXX	XXX	XXX
Brazil nut oil premiumization	XXX	XXX	XXX
Processing and quality-control investment	XXX	XXX	XXX
Digital specialty-food distribution	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Wild-crop supply volatility	XXX	XXX	XXX
Aflatoxin compliance burden	XXX	XXX	XXX
Remote-origin logistics	XXX	XXX	XXX
Competing tree-nut substitution	XXX	XXX	XXX
Consumption-frequency constraints	XXX	XXX	XXX

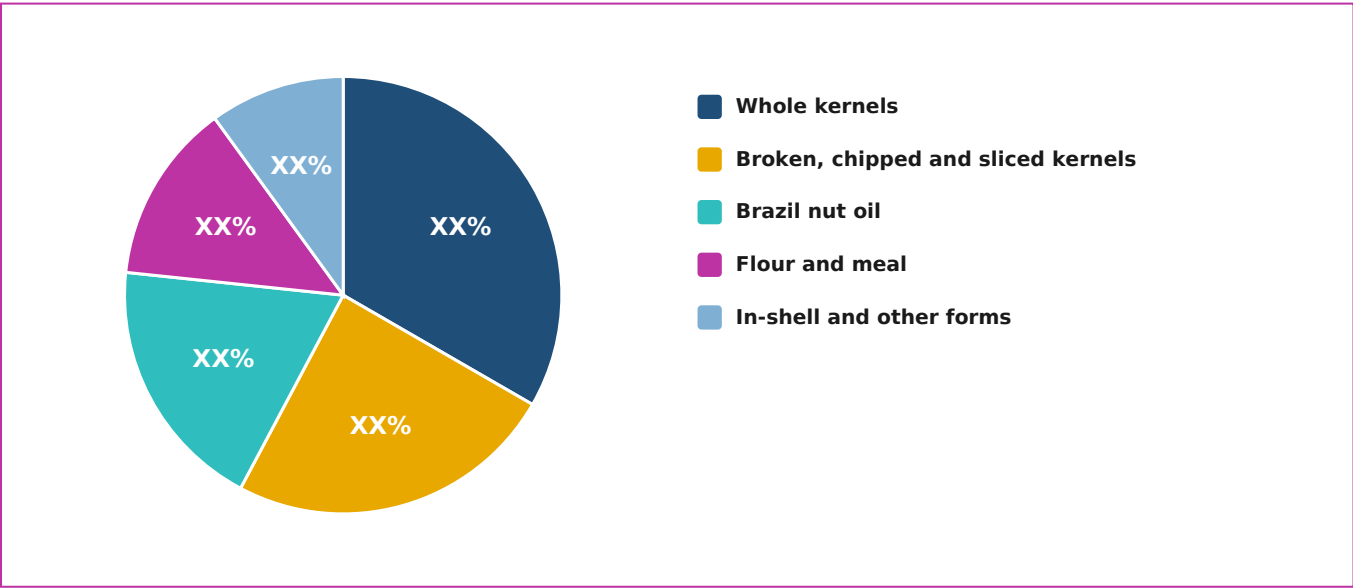
Source: XXX

Brazil Nut Market Segmentation by Form, Nature, Application and Channel

By Product Form

Whole kernels command the highest unit values and dominate retail snacking, premium mixes and confectionery decoration. Broken and sliced kernels provide a lower-cost input for bakery, cereals and processed foods. Oil and flour are expanding faster as processors monetize off-grade kernels and personal-care manufacturers seek differentiated Amazonian ingredients.

Value share by product Form, 2025



Source: XXX

Value by product Form, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Whole kernels	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Broken, chipped and sliced kernels	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Brazil nut oil	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Flour and meal	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
In-shell and other forms	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Nature

Conventional supply remains dominant because forest collection zones and processors differ in certification coverage, and mainstream mixed-nut buyers prioritize grade and price. Organic supply earns a premium in

European and North American natural-food channels. Growth is being reinforced by group certification, cooperative audit support and long-term buyer relationships.

Value by nature, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Conventional	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Organic	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Retail snacking leads because consumers primarily recognize Brazil nuts as premium whole kernels or components of mixed-nut packs. Bakery and confectionery use broken, sliced and whole grades according to visual requirements. Plant-based products and personal care are expanding rapidly through nut butter, beverage, flour and cold-pressed oil formulations.

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Direct snacking and household use	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Bakery and cereals	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Confectionery	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Plant-based beverages and spreads	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Cosmetics and personal care	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other applications	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Industrial channels lead because importers, packers, bakeries and ingredient processors purchase bulk grades before value-added retail conversion. Supermarkets remain the largest consumer-facing outlet through private-label nuts and branded mixes. Online retail is growing fastest by improving availability of organic, raw and origin-specific Brazil nuts outside mature natural-food markets.

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Industrial and B2B processors	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Supermarkets and hypermarkets	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Online retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Specialty and natural-food stores	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice and other channels	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

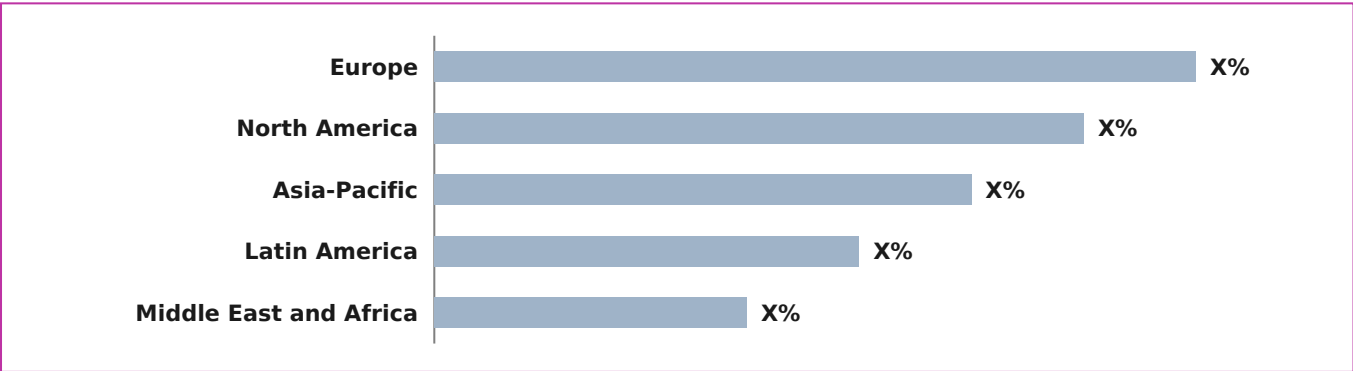
Brazil Nut Market Regional Analysis and Country Outlook

Europe generated XX% of global Brazil nut market value in 2025. Germany, the United Kingdom, the Netherlands and France form the region's principal consumption and trading corridor: the Netherlands acts as an import and redistribution hub, while Germany and the United Kingdom support large organic, private-label and mixed-nut categories. Mature food-safety systems, established edible-nut packers and demand for certified forest products sustain Europe's leadership.

North America held XX% of global value, led overwhelmingly by the United States. The region's opportunity centers on premium natural-food retail, e-commerce, functional-nutrition positioning and ingredient demand from snack and bakery manufacturers. Canada contributes a smaller but certification-intensive market in which organic and ethically sourced offerings achieve strong shelf placement.

Asia-Pacific will expand at a XX% CAGR through 2031, ahead of every other region. China is developing as the largest incremental opportunity through premium gifting, imported nut mixes and online retail, while Japan and South Korea reward consistent grading, compact packaging and documented quality. Latin America remains strategically important as both the production base and a growing consumer market, with Brazil developing branded snacks, oils and cosmetics alongside its export trade.

Growth rate by region, 2025-2031



Source: XXX

Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

Brazil Nut Market Competitive Landscape and Company Share

The Brazil nut market is fragmented across forest collectors, cooperatives, concession holders, primary processors, international traders, ingredient suppliers and consumer brands. The five largest participants accounted for XX% of 2025 market value. Tahuamanu, Manutata and other Bolivian processors benefit from proximity to the largest raw-material pool, while Cooperacre, Candela Organic and Amazon Andes differentiate through regional sourcing, certification and value-added processing.

Competitive advantage is determined by access to working capital before the harvest, relationships with collector communities, drying and storage discipline, electronic sorting capability, laboratory controls and the ability to supply multiple kernel grades. Importers and branded packers increasingly use multi-origin procurement to reduce exposure to seasonal shortages, with long-term purchasing arrangements replacing a portion of opportunistic spot buying.

Strategic investment is moving toward origin traceability, aflatoxin prevention, higher whole-kernel recovery and monetization of broken kernels through flour, butter and oil. Cooperative modernization and public bioeconomy funding are strengthening Brazilian supply, while branded companies in consuming markets are competing through organic certification, resealable formats and portion-led functional positioning.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Tahuamanu S.A.	XXX	XXX	XXX	XXX
Manutata S.A.	XXX	XXX	XXX	XXX
Empresa Boliviana de Alimentos y Derivados	XXX	XXX	XXX	XXX
Candela Organic	XXX	XXX	XXX	XXX
Amazon Andes	XXX	XXX	XXX	XXX
Cooperacre	XXX	XXX	XXX	XXX
Voicevale Ltd.	XXX	XXX	XXX	XXX
Freeworld Trading Ltd.	XXX	XXX	XXX	XXX
NOW Health Group, Inc.	XXX	XXX	XXX	XXX
Sunfood Superfoods	XXX	XXX	XXX	XXX
Terrasoul Superfoods	XXX	XXX	XXX	XXX

Source: XXX

Brazil Nut Market Forecast, Investment Priorities and Opportunities

The market will add USD XXX million between 2025 and 2031. Value growth will outpace physical-volume growth as certified origin, organic status, improved grading and consumer-ready packaging increase average realization. Whole kernels will remain the largest category, but Brazil nut oil and flour will record faster growth as processors pursue fuller crop utilization.

The central forecast assumes normalized Amazonian harvest variability, continued acceptance of Brazil nuts in premium snack mixes and sustained investment in food-safety controls. A stronger-harvest scenario would accelerate mainstream retail inclusion through lower prices, while repeated drought or flowering disruption would redirect volume toward high-margin specialty channels and reduce use in price-sensitive mixes.

Winning suppliers will combine secure community procurement with transparent chain-of-custody data, pre-financing, rapid post-harvest drying and flexible product grading. Buyers will favor portfolios capable of supplying conventional and organic kernels, ingredients and oils across more than one producing country.

Opportunities

- Origin-specific and indigenous-community product lines
- Value-added Brazil nut butter, beverages, protein flour and cold-pressed oil
- Direct sourcing agreements with cooperatives and forest concessions
- Digital chain-of-custody and deforestation-free procurement systems
- Premium retail expansion in China, South Korea, Japan and Southeast Asia
- Industrial use of broken kernels and press cake in bakery and nutrition products
- Supplier development programs combining working capital, drying and quality-control support

This preview shows the form and depth of the report. The full report contains every figure, segment- and country-level detail and full company profiles. On purchase all figures are finalised and verified, and the report is delivered within 24–72 hours.