



Tea in Brazil

November 2025

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Tea in Brazil - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Tea remains an underdeveloped category in Brazil

INDUSTRY PERFORMANCE

Healthier perception and innovation maintain an upward growth trajectory

More premium, functional variants drive retail value sales growth

WHAT'S NEXT?

Fruit/herbal tea to drive innovation and growth

New consumption occasions to be explored in tea

Local production to expand in Brazil

COMPETITIVE LANDSCAPE

Leão continues to dominate shelf space and off-trade value sales in tea

Smaller players focus on smaller retailers

CHANNELS

Large modern grocery retailers ensure a wide choice for consumers

Small local grocers remain important but face operating issues

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Hot Drinks in Brazil - Industry Overview

EXECUTIVE SUMMARY

Coffee continues to shape hot drinks in Brazil

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Inelastic consumption maintains positive retail volume growth trajectory for coffee despite rising prices

Convenience spurs fresh ground coffee pods while fresh coffee beans ride the quality wave

Health benefits spike interest in tea while there remains a habit of drinking chocolate milk

WHAT'S NEXT?

Positive outlook as coffee price rises slow

Premiumisation as a way to add dynamism to coffee

New consumption occasions to foster coffee demand

COMPETITIVE LANDSCAPE

New product developments in the pod and instant formats in coffee
More consolidated competitive landscapes in tea and other hot drinks

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