



Euromonitor
International

Tea in Brazil

November 2025

Table of Contents

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

CATEGORY DATA

Table 1 - Retail Sales of Tea by Category: Volume 2020-2025

Table 2 - Retail Sales of Tea by Category: Value 2020-2025

Table 3 - Retail Sales of Tea by Category: % Volume Growth 2020-2025

Table 4 - Retail Sales of Tea by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Tea: % Retail Value 2021-2025

Table 6 - LBN Brand Shares of Tea: % Retail Value 2022-2025

Table 7 - Forecast Retail Sales of Tea by Category: Volume 2025-2030

Table 8 - Forecast Retail Sales of Tea by Category: Value 2025-2030

Table 9 - Forecast Retail Sales of Tea by Category: % Volume Growth 2025-2030

Table 10 - Forecast Retail Sales of Tea by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

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 rides 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

CHANNELS

Daily consumption favours physical retailers
Foodservice developments push higher on-trade volume sales growth in 2025

MARKET DATA

Table 11 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2020-2025
Table 12 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2020-2025
Table 13 - Retail Sales of Hot Drinks by Category: Volume 2020-2025
Table 14 - Retail Sales of Hot Drinks by Category: Value 2020-2025
Table 15 - Retail Sales of Hot Drinks by Category: % Volume Growth 2020-2025
Table 16 - Retail Sales of Hot Drinks by Category: % Value Growth 2020-2025
Table 17 - Foodservice Sales of Hot Drinks by Category: Volume 2020-2025
Table 18 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2020-2025
Table 19 - Total Sales of Hot Drinks by Category: Total Volume 2020-2025
Table 20 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2020-2025
Table 21 - NBO Company Shares of Hot Drinks: % Retail Value 2021-2025
Table 22 - LBN Brand Shares of Hot Drinks: % Retail Value 2022-2025
Table 23 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2020-2025
Table 24 - Retail Distribution of Hot Drinks by Format: % Volume 2020-2025
Table 25 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2025
Table 26 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2025-2030
Table 27 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2025-2030
Table 28 - Forecast Retail Sales of Hot Drinks by Category: Volume 2025-2030
Table 29 - Forecast Retail Sales of Hot Drinks by Category: Value 2025-2030
Table 30 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2025-2030
Table 31 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2025-2030
Table 32 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2025-2030
Table 33 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2025-2030
Table 34 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2025-2030
Table 35 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer

trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/tea-in-brazil/report.