



Bottled Water in Brazil

November 2025

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Bottled Water in Brazil - Category analysis

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2025 DEVELOPMENTS

Bottled water gains from a range of factors

INDUSTRY PERFORMANCE

Mixed bag of factors drive the positive performance of bottled water

Structural and environmental developments at play

WHAT'S NEXT?

Still bottled water to continue to shape the category

Bottled water production to increase and consumption occasions to evolve

Tax reform could result in higher costs for bottled water companies

COMPETITIVE LANDSCAPE

Indaiá benefits from strong company activity in a highly fragmented competitive landscape

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Soft drinks shows resilience amid economic uncertainty

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Orange juice production issues see prices spike

Traditional categories perform well amid macroeconomic challenges

Health and wellness impacts consumers' choices

WHAT'S NEXT?

Uncertainty to continue to impact soft drinks players and consumers

A "sin tax" would disrupt the industry

Health and wellness to shape the offer and sales development

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