



# RTD Tea in Brazil

November 2025

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## RTD Tea in Brazil - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

RTD remains undeveloped as a category in Brazil

#### INDUSTRY PERFORMANCE

Regular still RTD tea continues to shape the category performance

Players look to widen consumption occasions

#### WHAT'S NEXT?

Positive growth forecast despite stronger competition with functional drinks

Natural ingredients and functional claims to be explored in RTD tea

Reduced sugar RTD tea to benefit from higher taxes on sugary beverages

#### COMPETITIVE LANDSCAPE

Distribution reach a key factor in brand performance

Carbonated RTD tea and kombucha is a more fragmented category

#### CHANNELS

Large modern grocery retailers dominate distribution

Players tend to bet on small local grocers for kombucha brands

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## Soft Drinks in Brazil - Industry Overview

### EXECUTIVE SUMMARY

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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