



**Euromonitor
International**

Coffee in Brazil

November 2025

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Coffee in Brazil - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Coffee registers growth in demand despite major challenges

INDUSTRY PERFORMANCE

High export volumes contribute to lower stocks and price spikes in coffee in 2025

Convenience and new flavours and brands help fresh ground coffee pods register the highest retail volume sales growth

WHAT'S NEXT?

Off-trade volume sales are set to see incrementally higher growth despite challenges ahead

Technological approaches to remain at the forefront of company strategies

Premiumisation to expand across coffee

COMPETITIVE LANDSCAPE

The competition increases in fresh coffee beans and fresh ground coffee

Nestlé Brasil invests to expand instant coffee

CHANNELS

Large modern grocery retailers dominate distribution but private label gains traction in other channels

Shift to foodservice as price differences narrow and consumption occasions increase

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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 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

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More consolidated competitive landscapes in tea and other hot drinks

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