



**Euromonitor
International**

Hot Drinks Packaging in Brazil

September 2026

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KEY DATA INSIGHTS

2025 DEVELOPMENTS

Steady volume growth in 2025 supported by expanding coffee culture, premiumisation, and plastic packaging reform

INDUSTRY PERFORMANCE

Flexible packaging sustains dominant position as total hot drinks packaging volumes grow modestly in 2025

Metal records the strongest growth across pack type groups in 2025, supported by premiumisation in coffee and tea

Decree 12.688/2025 establishes mandatory reverse logistics for plastic packaging, directly affecting hot drinks converters

WHAT'S NEXT?

Brazilian hot drinks packaging forecast to reach 5,259 million units by 2029, with paper-based containers leading growth

Mono-material flexible and expanded tea packaging formats represent the strongest strategic opportunities through 2029

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