



Hot Drinks in Brazil

November 2025

Table of Contents

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 1 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2020-2025

Table 2 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2020-2025

Table 3 - Retail Sales of Hot Drinks by Category: Volume 2020-2025

Table 4 - Retail Sales of Hot Drinks by Category: Value 2020-2025

Table 5 - Retail Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 6 - Retail Sales of Hot Drinks by Category: % Value Growth 2020-2025

Table 7 - Foodservice Sales of Hot Drinks by Category: Volume 2020-2025

Table 8 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 9 - Total Sales of Hot Drinks by Category: Total Volume 2020-2025

Table 10 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2020-2025

Table 11 - NBO Company Shares of Hot Drinks: % Retail Value 2021-2025

Table 12 - LBN Brand Shares of Hot Drinks: % Retail Value 2022-2025

Table 13 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2020-2025

Table 14 - Retail Distribution of Hot Drinks by Format: % Volume 2020-2025

Table 15 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2025

Table 16 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2025-2030

Table 17 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2025-2030

Table 18 - Forecast Retail Sales of Hot Drinks by Category: Volume 2025-2030

Table 19 - Forecast Retail Sales of Hot Drinks by Category: Value 2025-2030

Table 20 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 21 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2025-2030

Table 22 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2025-2030

Table 23 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 24 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2025-2030

Table 25 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

[Coffee in Brazil](#)

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

CATEGORY DATA

Table 26 - Retail Sales of Coffee by Category: Volume 2020-2025

Table 27 - Retail Sales of Coffee by Category: Value 2020-2025

Table 28 - Retail Sales of Coffee by Category: % Volume Growth 2020-2025

Table 29 - Retail Sales of Coffee by Category: % Value Growth 2020-2025

Table 30 - Retail Sales of Fresh Ground Coffee Pods by Hard vs Soft: % Volume 2020-2025

Table 31 - NBO Company Shares of Coffee: % Retail Value 2021-2025

Table 32 - LBN Brand Shares of Coffee: % Retail Value 2022-2025

Table 33 - Forecast Retail Sales of Coffee by Category: Volume 2025-2030

Table 34 - Forecast Retail Sales of Coffee by Category: Value 2025-2030

Table 35 - Forecast Retail Sales of Coffee by Category: % Volume Growth 2025-2030

Table 36 - Forecast Retail Sales of Coffee by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Tea in Brazil](#)

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 37 - Retail Sales of Tea by Category: Volume 2020-2025

Table 38 - Retail Sales of Tea by Category: Value 2020-2025

Table 39 - Retail Sales of Tea by Category: % Volume Growth 2020-2025

Table 40 - Retail Sales of Tea by Category: % Value Growth 2020-2025

Table 41 - NBO Company Shares of Tea: % Retail Value 2021-2025

Table 42 - LBN Brand Shares of Tea: % Retail Value 2022-2025

Table 43 - Forecast Retail Sales of Tea by Category: Volume 2025-2030

Table 44 - Forecast Retail Sales of Tea by Category: Value 2025-2030

Table 45 - Forecast Retail Sales of Tea by Category: % Volume Growth 2025-2030

Table 46 - Forecast Retail Sales of Tea by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Other Hot Drinks in Brazil](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

The category develops and grows despite challenges

INDUSTRY PERFORMANCE

Chocolate-based flavoured powder drinks afford a variety of uses

Positive, if marginal, retail volume growth amidst strong upward pressure on prices

WHAT'S NEXT?

Divergent performances anticipated at the category level

Brazil to potentially grow as an international cocoa producer

Other hot drinks with healthier approaches and ingredients are set to gain traction

COMPETITIVE LANDSCAPE

Nestlé Brasil leverages a strong and developing portfolio to lead other hot drinks

Toddy benefits from the exploration of exclusive and appealing options

CHANNELS

Chocolate-based flavoured powder drinks remain popular items in supermarkets and hypermarkets

Small local grocers offer a convenient alternative to large modern grocery retailers

CATEGORY DATA

Table 47 - Retail Sales of Other Hot Drinks by Category: Volume 2020-2025

Table 48 - Retail Sales of Other Hot Drinks by Category: Value 2020-2025

Table 49 - Retail Sales of Other Hot Drinks by Category: % Volume Growth 2020-2025

Table 50 - Retail Sales of Other Hot Drinks by Category: % Value Growth 2020-2025

Table 51 - NBO Company Shares of Other Hot Drinks: % Retail Value 2021-2025

Table 52 - LBN Brand Shares of Other Hot Drinks: % Retail Value 2022-2025

Table 53 - Forecast Retail Sales of Other Hot Drinks by Category: Volume 2025-2030

Table 54 - Forecast Retail Sales of Other Hot Drinks by Category: Value 2025-2030

Table 55 - Forecast Retail Sales of Other Hot Drinks by Category: % Volume Growth 2025-2030

Table 56 - Forecast Retail Sales of Other Hot Drinks by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

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/hot-drinks-in-brazil/report.