

Sports Drinks in Latin America

July 2020

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Scope

Key findings

REGIONAL OVERVIEW

Significant opportunities for expansion within Latin America

Growth dependent on economic stability and healthy positioning

Economic slowdowns have a significant influence on category sales...

...but rising interest in fitness has bolstered sales

Mexico sees highest growth in 2019, while the category suffers in Brazil

Sugar legislation and health awareness lead to growth for reduced sugar sports drinks

Independent mall grocers and supermarkets lead distribution

LEADING COMPANIES AND BRANDS

The sports drink category is highly consolidated in the region...

...and growth trends will further accelerate top brand dominance

The market is also comprised of many regional brands...

...making for a dynamic market outside of the top five brands

Powerade and Gatorade are the top brands in most of Latin America

FORECAST PROJECTIONS

Mexico and Guatemala forecast to see the highest growth

Economic threats to constrain growth but significant potential in health

Market environment offers potential for sports drinks

COUNTRY SNAPSHOTS

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Mexico: competitive and retail landscape

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Peru: competitive and retail landscape

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Guatemala: competitive and retail landscape

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Brazil: competitive and retail landscape

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Costa Rica: market context

Costa Rica: competitive and retail landscape

Bolivia: market context

Bolivia: competitive and retail landscape

Uruguay: market context

Uruguay: competitive and retail landscape

APPENDIX: INDUSTRY FORECAST MODEL

Growth decomposition explained

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