



**Euromonitor  
International**

# Hot Drinks in Brazil

November 2025

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### 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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Daily consumption favours physical retailers

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## 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

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More premium, functional variants drive retail value sales growth

### WHAT'S NEXT?

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New consumption occasions to be explored in tea

Local production to expand in Brazil

## COMPETITIVE LANDSCAPE

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[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

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