



Euromonitor
International

Spirits in Brazil

August 2026

Table of Contents

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Spirits Summary

KEY INDUSTRY TRENDS

Chart 1 - Key Industry Trends for Spirits

INDUSTRY PERFORMANCE

Health Concerns and Economic Pressures Hurt Sales

Chart 2 - Ballena Introduces New Flavour to Its Liqueurs

Cachaça Dominates Volume Sales, While Liqueurs Show Positive Momentum

Aurora Leverages Premium Tequila Launch to Drive Premiumisation

Chart 3 - Volume Sales 2020-2030

Chart 4 - Volume Sales by Category 2025

WHAT'S NEXT?

Premiumisation and Local Innovation to Drive Growth Amid Economic Shifts

Cachaça to Retain Dominance While Whiskies Set to Fuel Value Gains

Companies Make Changes to Navigate Sin Tax Challenges

Chart 5 - Forecast Volume Sales 2020-2030

Chart 6 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Chart 7 - Analyst Insight for Spirits

Cachaça Producers Dominate the Market

Brand Resilience and Growth in Niche Segments Offer Strategic Business Opportunities

Chart 8 - Company Shares 2025

Chart 9 - Brand Shares 2025

CHANNELS

Food/Drink/Tobacco Specialists Lead as Warehouse Clubs Gain Traction

E-Commerce Retains a Niche Role but Shows Promise

PRODUCTS

Chart 10 - Premium Tequila Arrives in Brazil

Aurora Fine Brands Drives Premium Tequila Launch to Reshape Consumption

Ballena and Don Luiz Leverage Sweet Flavours to Captivate Brazilian Palates

Baly'S Canned Spirits and Premium Launches Reshape Safety and Quality Perceptions

ECONOMIC CONTEXT

Chart 11 - Real Gdp Growth 2020-2030

Chart 12 - Inflation 2020-2030

Chart 13 - Economic Context for Spirits

CONSUMER CONTEXT

Chart 14 - Population 2020-2030

Chart 15 - Population by Generation 2025

Chart 16 - Consumer Context for Spirits

COUNTRY REPORTS DISCLAIMER

EXECUTIVE SUMMARY

2025 Developments

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

Chart 17 - Key Industry Trends for Alcoholic Drinks

INDUSTRY PERFORMANCE

Economic and Social Factors Drive Sharp Volume Decline Amid Steady Value Growth

Beer Retains Dominance While Rtds Emerges as the Fastest-Growing Category

Chart 18 - Skol Zero Launch Taps into Nolo Trend

Skol Zero Launch and Premium Investments Reshape Consumer Choice

Chart 19 - Volume Sales 2020-2030

Chart 20 - Volume Sales by Category 2025

WHAT'S NEXT?

Producers Adapt to Economic Uncertainty and Demands From Health-Conscious Consumers

Breweries to Focus on Premium Offerings as Rtds Benefit From a Focus on Moderation

Health Trends and Sin Tax Set to Drive Innovation While Premiumisation Reshapes Operational Strategies

Chart 21 - Forecast Volume Sales 2020-2030

Chart 22 - Forecast Volume Sales by Category 2025-2030

Chart 23 - Analyst Insight for Alcoholic Drinks

COMPETITIVE LANDSCAPE

Top Three Players Account for 87% of Sales

Brand Innovation Offers Expansion Avenues for Established Players

Chart 24 - Company Shares 2025

Chart 25 - Brand Shares 2025

CHANNELS

Grocery Retailers Continue to Dominate Sales

Convenience and Price Sensitivity Drive Retail Trends and Channel Shifts

Retail E-Commerce Grows Steadily, Driven by Convenience and Brand Innovation

MARKET BACKGROUND

Legislation

Legal Purchasing Age and Legal Drinking Age

Drink Driving

Advertising

Smoking Ban

Opening Hours

On-Trade Establishments

TAXATION AND DUTY LEVIES

OPERATING ENVIRONMENT

Contraband/Parallel Trade

Duty Free

Cross-Border/Private Imports

PRODUCTS

Health Concerns and Economic Factors Drive No/Low Alcohol Innovation and Market Polarisation

Chart 26 - Cia Brasileira Expands Premium Beer Production

ECONOMIC CONTEXT

Chart 27 - Real Gdp Growth 2020-2030

Chart 28 - Inflation 2020-2030

Chart 29 - Economic Context for Alcoholic Drinks

CONSUMER CONTEXT

Chart 30 - Population 2020-2030

Chart 31 - Population by Generation 2025

Chart 32 - Consumer Context for Alcoholic Drinks

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/spirits-in-brazil/report.