



Juice in Brazil

November 2025

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Juice in Brazil - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Players look for alternatives amidst orange juice issues

INDUSTRY PERFORMANCE

Weaker orange juice production impacts the category as a whole

Price-driven consumers favour juice drinks and nectars

WHAT'S NEXT?

Different fruit and vegetable blends to be explored

Challenges in reducing sugar content in juice

Tax reform to potentially benefit 100% juice

COMPETITIVE LANDSCAPE

Del Valle remains the leading brand through wide distribution and high consumer awareness

Natural One invests in the supply chain and bets on alternative ingredients

CHANNELS

Price-driven retailers gain traction

Retail e-commerce remains of little consequence in juice distribution

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Soft Drinks in Brazil - Industry Overview

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Soft drinks shows resilience amid economic uncertainty

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Orange juice production issues see prices spike

Traditional categories perform well amid macroeconomic challenges

Health and wellness impacts consumers' choices

WHAT'S NEXT?

Uncertainty to continue to impact soft drinks players and consumers

A "sin tax" would disrupt the industry

Health and wellness to shape the offer and sales development

COMPETITIVE LANDSCAPE

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Dynamic brand landscape in energy drinks

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