

Soft Drinks in Brazil

April 2025

Table of Contents

Soft Drinks in Brazil

EXECUTIVE SUMMARY

Soft drinks in 2024: The big picture

2024 key trends

Competitive landscape

Retailing developments

Foodservice vs retail split

What next for soft drinks?

MARKET DATA

- Table 1 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2019-2024
- Table 2 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2019-2024
- Table 3 Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2019-2024
- Table 4 Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2019-2024
- Table 5 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2024
- Table 6 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2024
- Table 7 Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2024
- Table 8 Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2024
- Table 9 Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2019-2024
- Table 10 Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2019-2024
- Table 11 Off-trade Sales of Soft Drinks by Category: Value 2019-2024
- Table 12 Off-trade Sales of Soft Drinks by Category: % Value Growth 2019-2024
- Table 13 Sales of Soft Drinks by Total Fountain On-trade: Volume 2019-2024
- Table 14 Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2019-2024
- Table 15 NBO Company Shares of Total Soft Drinks (RTD): % Volume 2020-2024
- Table 16 LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2021-2024
- Table 17 NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2020-2024
- Table 18 LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2021-2024
- Table 19 NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2024
- Table 20 LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2024
- Table 21 NBO Company Shares of Off-trade Soft Drinks: % Value 2020-2024
- Table 22 LBN Brand Shares of Off-trade Soft Drinks: % Value 2021-2024
- Table 23 Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2019-2024
- Table 24 Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2019-2024
- Table 25 Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2019-2024
- Table 26 Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2024
- Table 27 Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2024-2029
- Table 28 Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2024-2029
- Table 29 Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2024-2029
- Table 30 Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2024-2029
- Table 31 Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2024-2029
- Table 32 Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2024-2029
- Table 33 Forecast Off-trade Sales of Soft Drinks by Category: Value 2024-2029
- Table 34 Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2024-2029
- Table 35 Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2024-2029
- Table 36 Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2024-2029

APPENDIX

Fountain sales in Brazil

Trends

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Bottled Water in Brazil

KEY DATA FINDINGS

2024 DEVELOPMENTS

Heatwaves and rising health awareness drive bottled water consumption

New launches invest in new formats and consumption occasions

Bottled water continues to be sold mainly though supermarkets and hypermarkets

PROSPECTS AND OPPORTUNITIES

Inadequate waste management leads to lack of access to quality drinking water

Carbonated water is more frequently used in mocktails, and is expected to grow as healthier alternative

Flavoured bottled water set to see rapid growth, considered a healthier alternative to carbonates

CATEGORY DATA

Table 37 - Off-trade Sales of Bottled Water by Category: Volume 2019-2024

Table 38 - Off-trade Sales of Bottled Water by Category: Value 2019-2024

Table 39 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2019-2024

Table 40 - Off-trade Sales of Bottled Water by Category: % Value Growth 2019-2024

Table 41 - NBO Company Shares of Off-trade Bottled Water: % Volume 2020-2024

Table 42 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2021-2024

Table 43 - NBO Company Shares of Off-trade Bottled Water: % Value 2020-2024

Table 44 - LBN Brand Shares of Off-trade Bottled Water: % Value 2021-2024

Table 45 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2024-2029

Table 46 - Forecast Off-trade Sales of Bottled Water by Category: Value 2024-2029

Table 47 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2024-2029

Table 48 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2024-2029

Carbonates in Brazil

KEY DATA FINDINGS

2024 DEVELOPMENTS

Carbonates grows further in 2024, driven by global warming and marketing

New launches in carbonates explore flavours and collaborations to stand out

Health and wellness concerns drive launches and brand positioning, and intensify the competition

PROSPECTS AND OPPORTUNITIES

Increasing demand for functionality will lead to competition with other categories

Growth opportunities through marketing and increased penetration

Tax reform expected to increase prices of carbonates with sugar from 2027

CATEGORY DATA

Table 49 - Off-trade vs On-trade Sales of Carbonates: Volume 2019-2024

Table 50 - Off-trade vs On-trade Sales of Carbonates: Value 2019-2024

Table 51 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2019-2024

Table 52 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2019-2024

Table 53 - Off-trade Sales of Carbonates by Category: Volume 2019-2024

Table 54 - Off-trade Sales of Carbonates by Category: Value 2019-2024

Table 55 - Off-trade Sales of Carbonates by Category: % Volume Growth 2019-2024

Table 56 - Off-trade Sales of Carbonates by Category: % Value Growth 2019-2024

- Table 57 Total Sales of Carbonates by Fountain On-trade: Volume 2019-2024
- Table 58 Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2019-2024
- Table 59 NBO Company Shares of Off-trade Carbonates: % Volume 2020-2024
- Table 60 LBN Brand Shares of Off-trade Carbonates: % Volume 2021-2024
- Table 61 NBO Company Shares of Off-trade Carbonates: % Value 2020-2024
- Table 62 LBN Brand Shares of Off-trade Carbonates: % Value 2021-2024
- Table 63 Forecast Off-trade Sales of Carbonates by Category: Volume 2024-2029
- Table 64 Forecast Off-trade Sales of Carbonates by Category: Value 2024-2029
- Table 65 Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2024-2029
- Table 66 Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2024-2029
- Table 67 Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2024-2029
- Table 68 Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2024-2029

Concentrates in Brazil

KEY DATA FINDINGS

2024 DEVELOPMENTS

Consumers migrate to other categories

Novelties and expansion to other categories

Supermarkets and hypermarkets remain the main distribution channels for concentrates

PROSPECTS AND OPPORTUNITIES

Fiercer competition with categories seen as healthier and more functional

Inflation may drive consumers to opt for cheaper alternatives

Growing consumer awareness will intensify scrutiny of nutritional information

CATEGORY DATA

Concentrates conversions

- Summary 2 Concentrates Conversion Factors for Ready-to-Drink (RTD) Format
- Table 69 Off-trade Sales of Concentrates (RTD) by Category: Volume 2019-2024
- Table 70 Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2019-2024
- Table 71 Off-trade Sales of Concentrates by Category: Value 2019-2024
- Table 72 Off-trade Sales of Concentrates by Category: % Value Growth 2019-2024
- Table 73 LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2021-2024
- Table 74 NBO Company Shares of Off-trade Concentrates: % Value 2020-2024
- Table 75 LBN Brand Shares of Off-trade Concentrates: % Value 2021-2024
- Table 76 NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2024
- Table 77 LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2024
- Table 78 NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2020-2024
- Table 79 LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2024
- Table 80 Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2024-2029
- Table 81 Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2024-2029
- Table 82 Forecast Off-trade Sales of Concentrates by Category: Value 2024-2029
- Table 83 Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2024-2029

Juice in Brazil

KEY DATA FINDINGS

2024 DEVELOPMENTS

Problems with Brazilian orange production impact sales and accelerate diversification

Health, blended flavours, and functionality inspire most launches

Supermarkets and hypermarkets remain the main distribution channels for juice

PROSPECTS AND OPPORTUNITIES

Consumers empowered to make more informed decisions

Popularity of protein set to expand further in juice

The sugar/sweeteners dilemma

CATEGORY DATA

Table 84 - Off-trade Sales of Juice by Category: Volume 2019-2024

Table 85 - Off-trade Sales of Juice by Category: Value 2019-2024

Table 86 - Off-trade Sales of Juice by Category: % Volume Growth 2019-2024

Table 87 - Off-trade Sales of Juice by Category: % Value Growth 2019-2024

Table 88 - NBO Company Shares of Off-trade Juice: % Volume 2020-2024

Table 89 - LBN Brand Shares of Off-trade Juice: % Volume 2021-2024

Table 90 - NBO Company Shares of Off-trade Juice: % Value 2020-2024

Table 91 - LBN Brand Shares of Off-trade Juice: % Value 2021-2024

Table 92 - Forecast Off-trade Sales of Juice by Category: Volume 2024-2029

Table 93 - Forecast Off-trade Sales of Juice by Category: Value 2024-2029

Table 94 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2024-2029

Table 95 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2024-2029

RTD Coffee in Brazil

KEY DATA FINDINGS

2024 DEVELOPMENTS

RTD coffee still not inserted in most Brazilians' routines

Launch of RTD coffee in metal beverage cans

Forecourt retailers is the main distribution channel for RTD coffee

PROSPECTS AND OPPORTUNITIES

Increasing coffee prices will pose a challenge for RTD coffee in the coming years

Better perception of quality will be the main focus of the industry

Consumer awareness of the need for sleep is a threat and an opportunity

CATEGORY DATA

Table 96 - Off-trade Sales of RTD Coffee: Volume 2019-2024

Table 97 - Off-trade Sales of RTD Coffee: Value 2019-2024

Table 98 - Off-trade Sales of RTD Coffee: % Volume Growth 2019-2024

Table 99 - Off-trade Sales of RTD Coffee: % Value Growth 2019-2024

Table 100 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2020-2024

Table 101 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2021-2024

Table 102 - NBO Company Shares of Off-trade RTD Coffee: % Value 2020-2024

Table 103 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2021-2024

Table 104 - Forecast Off-trade Sales of RTD Coffee: Volume 2024-2029

Table 105 - Forecast Off-trade Sales of RTD Coffee: Value 2024-2029

Table 106 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2024-2029

Table 107 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2024-2029

RTD Tea in Brazil

KEY DATA FINDINGS

2024 DEVELOPMENTS

RTD tea expands the number of occasions for consumers to drink tea

New launches focus on expanding distribution, and new consumption occasions

Most sales of RTD tea remain through supermarkets and hypermarkets

PROSPECTS AND OPPORTUNITIES

New ingredients and functionalities expected to be seen in RTD tea Kombucha has growth potential, especially with rising production Mixology on the horizon for RTD tea

CATEGORY DATA

Table 108 - Off-trade Sales of RTD Tea by Category: Volume 2019-2024

Table 109 - Off-trade Sales of RTD Tea by Category: Value 2019-2024

Table 110 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2019-2024

Table 111 - Off-trade Sales of RTD Tea by Category: % Value Growth 2019-2024

Table 112 - Leading Flavours for Off-trade RTD Tea: % Volume 2019-2024

Table 113 - NBO Company Shares of Off-trade RTD Tea: % Volume 2020-2024

Table 114 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2021-2024

Table 115 - NBO Company Shares of Off-trade RTD Tea: % Value 2020-2024

Table 116 - LBN Brand Shares of Off-trade RTD Tea: % Value 2021-2024

Table 117 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2024-2029

Table 118 - Forecast Off-trade Sales of RTD Tea by Category: Value 2024-2029

Table 119 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2024-2029

Table 120 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2024-2029

Energy Drinks in Brazil

KEY DATA FINDINGS

2024 DEVELOPMENTS

Brazil is amongst the fastest growing countries globally in energy drinks Fiercer competition in energy drinks, with new brands emerging

Grocery retailers continue to dominate energy drinks

PROSPECTS AND OPPORTUNITIES

More variants, including those containing healthier and natural ingredients, expected to be seen in the coming years

More functionalities and personalisation in the horizon

PET bottles will continue to gain traction

CATEGORY DATA

Table 121 - Off-trade Sales of Energy Drinks: Volume 2019-2024

Table 122 - Off-trade Sales of Energy Drinks: Value 2019-2024

Table 123 - Off-trade Sales of Energy Drinks: % Volume Growth 2019-2024

Table 124 - Off-trade Sales of Energy Drinks: % Value Growth 2019-2024

Table 125 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2020-2024

Table 126 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2021-2024

Table 127 - NBO Company Shares of Off-trade Energy Drinks: % Value 2020-2024

Table 128 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2021-2024

Table 129 - Forecast Off-trade Sales of Energy Drinks: Volume 2024-2029

Table 130 - Forecast Off-trade Sales of Energy Drinks: Value 2024-2029

Table 131 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2024-2029

Table 132 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2024-2029

Sports Drinks in Brazil

KEY DATA FINDINGS

2024 DEVELOPMENTS

Brazil continues to see exceptional growth in sports drinks, although from a low base

New sugar-free versions, new flavours, and sports sponsorship amongst the main investments

Health and beauty specialists could offer opportunities, but grocery retailers dominate

PROSPECTS AND OPPORTUNITIES

Fiercer competition expected not only within sports drinks, but also from other categories Innovation in diagnosing dehydration with wearable technology

New brand positionings targeting different consumption occasions likely to emerge

CATEGORY DATA

Table 133 - Off-trade Sales of Sports Drinks: Volume 2019-2024

Table 134 - Off-trade Sales of Sports Drinks: Value 2019-2024

Table 135 - Off-trade Sales of Sports Drinks: % Volume Growth 2019-2024

Table 136 - Off-trade Sales of Sports Drinks: % Value Growth 2019-2024

Table 137 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2020-2024

Table 138 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2021-2024

Table 139 - NBO Company Shares of Off-trade Sports Drinks: % Value 2020-2024

Table 140 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2021-2024

Table 141 - Forecast Off-trade Sales of Sports Drinks: Volume 2024-2029

Table 142 - Forecast Off-trade Sales of Sports Drinks: Value 2024-2029

Table 143 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2024-2029

Table 144 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2024-2029

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/soft-drinks-in-brazil/report.