



Concentrates in Brazil

November 2025

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Concentrates in Brazil - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Concentrates remains on a downward volume trajectory

INDUSTRY PERFORMANCE

Price increases hinder the appeal of concentrates

Price-sensitive shopping offers some respite for concentrates

WHAT'S NEXT?

Unhealthy perception to pose challenges for concentrates

Functional powder concentrates may gain space

New "sin tax" to lead to price increases

COMPETITIVE LANDSCAPE

Empresa Brasileira de Bebidas e Alimentos and Mondelez Brasil provide the leading brands in liquid and powder concentrates, respectively

Players seek new avenues to growth in a highly challenging environment

CHANNELS

Large modern grocery retailers remain the key sellers of concentrates

Small local grocers offer a quick and easy alternative while warehouse clubs cater to price-sensitive bulk buyers

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EXECUTIVE SUMMARY

Soft drinks shows resilience amid economic uncertainty

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INDUSTRY PERFORMANCE

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

Coca-Cola Indústrias leads an intensifying competitive landscape

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