



RTD Tea in Brazil

November 2025

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RTD Tea in Brazil - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

RTD remains undeveloped as a category in Brazil

INDUSTRY PERFORMANCE

Regular still RTD tea continues to shape the category performance

Players look to widen consumption occasions

WHAT'S NEXT?

Positive growth forecast despite stronger competition with functional drinks

Natural ingredients and functional claims to be explored in RTD tea

Reduced sugar RTD tea to benefit from higher taxes on sugary beverages

COMPETITIVE LANDSCAPE

Distribution reach a key factor in brand performance

Carbonated RTD tea and kombucha is a more fragmented category

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Large modern grocery retailers dominate distribution

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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

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