



Coffee in Brazil

November 2025

Table of Contents

Coffee in Brazil - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Coffee registers growth in demand despite major challenges

INDUSTRY PERFORMANCE

High export volumes contribute to lower stocks and price spikes in coffee in 2025

Convenience and new flavours and brands help fresh ground coffee pods register the highest retail volume sales growth

WHAT'S NEXT?

Off-trade volume sales are set to see incrementally higher growth despite challenges ahead

Technological approaches to remain at the forefront of company strategies

Premiumisation to expand across coffee

COMPETITIVE LANDSCAPE

The competition increases in fresh coffee beans and fresh ground coffee

Nestlé Brasil invests to expand instant coffee

CHANNELS

Large modern grocery retailers dominate distribution but private label gains traction in other channels

Shift to foodservice as price differences narrow and consumption occasions increase

CATEGORY DATA

Table 1 - Retail Sales of Coffee by Category: Volume 2020-2025

Table 2 - Retail Sales of Coffee by Category: Value 2020-2025

Table 3 - Retail Sales of Coffee by Category: % Volume Growth 2020-2025

Table 4 - Retail Sales of Coffee by Category: % Value Growth 2020-2025

Table 5 - Retail Sales of Fresh Ground Coffee Pods by Hard vs Soft: % Volume 2020-2025

Table 6 - NBO Company Shares of Coffee: % Retail Value 2021-2025

Table 7 - LBN Brand Shares of Coffee: % Retail Value 2022-2025

Table 8 - Forecast Retail Sales of Coffee by Category: Volume 2025-2030

Table 9 - Forecast Retail Sales of Coffee by Category: Value 2025-2030

Table 10 - Forecast Retail Sales of Coffee by Category: % Volume Growth 2025-2030

Table 11 - Forecast Retail Sales of Coffee by Category: % Value Growth 2025-2030

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Hot Drinks in Brazil - Industry Overview

EXECUTIVE SUMMARY

Coffee continues to shape hot drinks in Brazil

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Inelastic consumption maintains positive retail volume growth trajectory for coffee despite rising prices

Convenience spurs fresh ground coffee pods while fresh coffee beans rides the quality wave

Health benefits spike interest in tea while there remains a habit of drinking chocolate milk

WHAT'S NEXT?

Positive outlook as coffee price rises slow

Premiumisation as a way to add dynamism to coffee

New consumption occasions to foster coffee demand

COMPETITIVE LANDSCAPE

New product developments in the pod and instant formats in coffee
More consolidated competitive landscapes in tea and other hot drinks

CHANNELS

Daily consumption favours physical retailers
Foodservice developments push higher on-trade volume sales growth in 2025

MARKET DATA

Table 12 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2020-2025
Table 13 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2020-2025
Table 14 - Retail Sales of Hot Drinks by Category: Volume 2020-2025
Table 15 - Retail Sales of Hot Drinks by Category: Value 2020-2025
Table 16 - Retail Sales of Hot Drinks by Category: % Volume Growth 2020-2025
Table 17 - Retail Sales of Hot Drinks by Category: % Value Growth 2020-2025
Table 18 - Foodservice Sales of Hot Drinks by Category: Volume 2020-2025
Table 19 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2020-2025
Table 20 - Total Sales of Hot Drinks by Category: Total Volume 2020-2025
Table 21 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2020-2025
Table 22 - NBO Company Shares of Hot Drinks: % Retail Value 2021-2025
Table 23 - LBN Brand Shares of Hot Drinks: % Retail Value 2022-2025
Table 24 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2020-2025
Table 25 - Retail Distribution of Hot Drinks by Format: % Volume 2020-2025
Table 26 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2025
Table 27 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2025-2030
Table 28 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2025-2030
Table 29 - Forecast Retail Sales of Hot Drinks by Category: Volume 2025-2030
Table 30 - Forecast Retail Sales of Hot Drinks by Category: Value 2025-2030
Table 31 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2025-2030
Table 32 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2025-2030
Table 33 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2025-2030
Table 34 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2025-2030
Table 35 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2025-2030
Table 36 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2025-2030

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SOURCES

Summary 1 - Research Sources

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