

Brazil Energy Drinks - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 90 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

Brazil Energy Drinks Market Analysis

The Brazil energy drink market was valued at USD 1.9 billion in 2025 and estimated to grow from USD 2.06 billion in 2026 to reach USD 3.06 billion by 2031, at a CAGR of 8.27% during the forecast period (2026-2031). Robust fitness participation, rapid digital retail adoption, and functional product innovation built around indigenous ingredients together underpin this growth. Traditional brands continue to dominate store shelves, yet health-driven reformulation and premium positioning of Guarana-based lines are expanding the consumer base beyond habitual users. Online platforms and same-day delivery services have unlocked nationwide reach, which is especially influential in secondary cities previously underserved by modern trade. Meanwhile, regulatory scrutiny of caffeine and sugar content is accelerating the shift toward reduced-sugar and clean-label formulations, rewarding companies with agile R&D capabilities.

Brazil Energy Drinks Market Trends and Insights

Rising gym-culture & influencer marketing in urban centres

Brazil hosts more than 34,000 health clubs and over 9 million members, and the sector's 13.97% annual expansion creates a multiplier effect on beverage demand. Each new gym member typically consumes two to three times more energy drinks than the average sedentary consumer, lifting both per-capita intake and purchase frequency. Hybrid fitness models that blend in-club training with digital coaching have broadened usage occasions, positioning energy beverages as both pre-workout stimulants and

recovery aids. As facilities incorporate retail corners and vending partnerships, brands secure exclusive shelf rights that reinforce habit formation. The Brazil energy drink market benefits from these ecosystem linkages, which deepen penetration in metropolitan areas and seed growth in fast-urbanizing secondary cities.

Direct-to-Consumer Digital Retailing Surge

Ambev's BEES platform and Ze Delivery service demonstrated the commercial power of direct reach by contributing 13.7% non-alcoholic revenue growth in 2024. These channels foster subscription models that smooth demand volatility and reduce last-mile costs, allowing brands to target gamers, athletes, and busy professionals with personalized bundles. In turn, data analytics refine flavor launches and promotion timing, lifting conversion rates versus broad-based mass media. Speed of fulfillment also helps mitigate stock-outs in traditional outlets, keeping the Brazil energy drink market resilient during peak demand spikes such as sporting events or e-sports tournaments. Smaller players, once constrained by distributor gatekeepers, now access nationwide audiences at lower capital outlays.

Proposed National Caffeine Limits & Warning Labels

ANVISA's IN 318/2024 introduces new constituent ceilings and labeling rules that may force high-caffeine SKUs off shelves if reformulation lags. Mandatory warnings could deter impulse purchases, especially among teens, trimming volume in entry-level price tiers. Compliance costs spanning lab testing, packaging redesign, and documentation place smaller manufacturers at risk of exit. Conversely, Category leaders with in-house R&D and diversified portfolios can pivot toward mid-caffeine or additive-enhanced variants that meet guidelines without diluting brand equity.

Other drivers and restraints analyzed in the detailed report include:

Guarana-Led Functional Innovation Pipeline Mass-Market Gaming & E-Sports Sponsorships Sugary-Drink Excise Tax Reform

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Traditional formulations accounted for 77.92% of the Brazil energy drink market share in 2025, underscoring deep-rooted consumption habits among logistics workers and students. Their scale economies support competitive pricing, cementing presence in convenience stores nationwide. However, sugar-reduction mandates and evolving taste preferences compel gradual reformulation, potentially eroding loyalty if flavor changes are poorly managed.

Energy shots are forecast to register an 11.48% CAGR, propelled by portability and concentrated efficacy. Agua da Serra's XP Energy Drink launch, supported by a R\$ 120 million factory upgrade, illustrates rising capital allocation toward shot formats. Retailers favor shots for shelf-efficiency, while on-the-go consumers appreciate dosing precision. As these attributes resonate with commuters and gamers, energy shots may capture incremental occasions previously served by coffee or soft drinks, thereby expanding the Brazil energy drink market size.

The Brazil Energy Drink Market is Segmented by Product Type (Energy Shots, Natural/Organic Energy Drinks, Sugar-Free or Low-Calories Energy Drinks, Traditional Energy Drinks, Other Energy Drinks), Distribution Channel (Supermarkets/Hypermarkets, Convenience Stores, Specialist Stores, More), Packaging Type (Metal Cans, PET Bottles, Glass Bottles, Tetra Pak/Pouches). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Red Bull GmbH Monster Beverage Corp. Anheuser-Busch InBev Grupo Petropolis (TNT Energy) PepsiCo Inc. (VOLT) Coca-Cola Brasil (Fusion / Monster JV) Britvic (Extra Power, Flying Horse) Integralmedica Celsius Holdings Bang Energy Rockstar Energy Probiotica Cervejaria Cidade Imperial (Vibra) Nautilus (Energy Shot) Saborama (Enerlin) Mefi Energy SOS Energy Shots Bionat Unique Korin Natural Energy NOS Energy (BR licence)

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

Table of Contents:

1 Introduction

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 Research Methodology

3 Executive Summary

4 Market Landscape

4.1 Market Overview

4.2 Market Drivers

4.2.1 Moderate sugar-reduction demand

4.2.2 Rising gym & fitness culture penetration

4.2.3 Direct-to-consumer digital retailing surge

4.2.4 Mass-market gaming & e-sports sponsorships

4.2.5 Guarana-led functional innovation pipeline

4.2.6 Functional Beverage Boom & Clean?Label Demand

4.3 Market Restraints

4.3.1 Proposed national caffeine limits & warning labels

4.3.2 Volatile aluminium-can import costs

4.3.3 Informal-sector counterfeit beverages

4.3.4 Sugary-drink excise tax reform

4.4 Value / Supply-Chain Analysis

4.5 Regulatory Landscape

4.6 Technological Outlook

4.7 Porter's Five Forces

4.7.1 Threat of New Entrants

4.7.2 Bargaining Power of Buyers / Consumers

4.7.3 Bargaining Power of Suppliers

4.7.4 Threat of Substitute Products

4.7.5 Intensity of Competitive Rivalry

5 Market Size & Growth Forecasts (Value, 2020-2030)

5.1 By Product Type

5.1.1 Energy Shots

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.1.2 Natural/Organic Energy Drinks
- 5.1.3 Sugar-free or Low-calories Energy Drinks
- 5.1.4 Traditional Energy Drinks
- 5.1.5 Other Energy Drinks
- 5.2 By Distribution Channel
 - 5.2.1 Supermarkets / Hypermarkets
 - 5.2.2 Convenience Stores
 - 5.2.3 Specialist Stores
 - 5.2.4 Online Retailers
 - 5.2.5 Others
- 5.3 By Packaging Type
 - 5.3.1 Metal Cans
 - 5.3.2 PET Bottles
 - 5.3.3 Glass Bottles
 - 5.3.4 Tetra Pak / Pouches

- 6 Competitive Landscape
 - 6.1 Market Concentration
 - 6.2 Strategic Moves
 - 6.3 Market Share Analysis
 - 6.4 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products & Services, and Recent Developments)
 - 6.4.1 Red Bull GmbH
 - 6.4.2 Monster Beverage Corp.
 - 6.4.3 Anheuser-Busch InBev
 - 6.4.4 Grupo Petropolis (TNT Energy)
 - 6.4.5 PepsiCo Inc. (VOLT)
 - 6.4.6 Coca-Cola Brasil (Fusion / Monster JV)
 - 6.4.7 Britvic (Extra Power, Flying Horse)
 - 6.4.8 Integralmedica
 - 6.4.9 Celsius Holdings
 - 6.4.10 Bang Energy
 - 6.4.11 Rockstar Energy
 - 6.4.12 Probiotica
 - 6.4.13 Cervejaria Cidade Imperial (Vibra)
 - 6.4.14 Nautilus (Energy Shot)
 - 6.4.15 Saborama (Enerlin)
 - 6.4.16 Mefi Energy
 - 6.4.17 SOS Energy Shots
 - 6.4.18 Bionat Unique
 - 6.4.19 Korin Natural Energy
 - 6.4.20 NOS Energy (BR licence)

7 Market Opportunities and Future Outlook

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com

Brazil Energy Drinks - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 90 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

| Select license | License | Price |
|----------------|--------------------------|-----------|
| | Single User License | \$4750.00 |
| | Team License (1-7 Users) | \$5250.00 |
| | Site License | \$6500.00 |
| | Corporate License | \$8750.00 |
| | | VAT |
| | | Total |

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

| | | | |
|---------------|----------------------|-------------------------------|---|
| Email* | <input type="text"/> | Phone* | <input type="text"/> |
| First Name* | <input type="text"/> | Last Name* | <input type="text"/> |
| Job title* | <input type="text"/> | | |
| Company Name* | <input type="text"/> | EU Vat / Tax ID / NIP number* | <input type="text"/> |
| Address* | <input type="text"/> | City* | <input type="text"/> |
| Zip Code* | <input type="text"/> | Country* | <input type="text"/> |
| | | Date | <input type="text" value="2026-02-17"/> |

Signature

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com