

# Coffee in Latin America

June 2022

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## REGIONAL OVERVIEW

Latin America beats the global average with its 2016-2021 CAGR

Slowing growth rates in the pandemic, but recovery expected from 2022

As sales slow in Brazil they impact the overall regional market

Fresh ground coffee dominates new sales in Brazil in 2016-2021

Instant coffee leads new sales in Mexico

Pandemic hits spending power in the region's biggest markets

Grocery retailers dominate retail sales of coffee

E-commerce presence remains limited in Latin American coffee

## LEADING COMPANIES AND BRANDS

Concentrated competitive landscapes at a national level

Leader Nestlé makes strong share gains in 2021

Brazil the main market for almost half of the top 10 players

Nestlé brands have a strong showing in the top 10 rankings

## FORECAST PROJECTIONS

Positive volume and value growth expected in the forecast period

Fresh ground coffee pods will be the most dynamic category

Rising prices will be behind Argentina's strong growth

## COUNTRY SNAPSHOTS

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Argentina: Competitive and Retail Landscape

Bolivia: Market Context

Bolivia: Competitive and Retail Landscape

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Brazil: Competitive and Retail Landscape

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