



Global Yerba Mate Extract Market

Market size, segmentation, competitive landscape and outlook

2021-2031

September 2026

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Indicator	Value
Market size (2025)	USD 0.7 bn
Forecast (2031)	USD 1.2 bn
CAGR (2021-2031)	7.8%
Study period	2021-2031
Largest region	North America · 32.5%
Fastest-growing region	Asia-Pacific · 9.6%
Market concentration	Moderate
Licence	Individual / Company

The global yerba mate extract market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Beverage manufacturers are moving the ingredient beyond traditional infusions into clean-label energy drinks, hydration products, concentrates and powdered mixes, while nutraceutical brands are adopting standardized caffeine and polyphenol extracts. North America leads demand, Asia-Pacific records the fastest growth, and South America remains the strategic center of leaf supply and primary processing. The report quantifies the market by form, extraction method, nature, application, distribution channel and geography, supported by processor audits, trade analysis and primary interviews across the value chain.

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Executive summary

The global yerba mate extract market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Beverage manufacturers are moving the ingredient beyond traditional infusions into clean-label energy drinks, hydration products, concentrates and powdered mixes, while nutraceutical brands are adopting standardized caffeine and polyphenol extracts. North America leads demand, Asia-Pacific records the fastest growth, and South America remains the strategic center of leaf supply and primary processing. The report quantifies the market by form, extraction method, nature, application, distribution channel and geography, supported by processor audits, trade analysis and primary interviews across the value chain.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- Global yerba mate extract revenue reached USD XXX billion in 2025 and will reach USD XXX billion by 2031.
- Powdered extracts represented XX% of 2025 market value because of their shelf stability, transport efficiency and compatibility with dry beverage and supplement systems.
- Beverage applications generated XX% of 2025 revenue and will remain the largest demand pool through 2031.
- Organic extracts accounted for XX% of 2025 value and will expand at a XX% CAGR as premium beverage brands tighten sourcing and certification requirements.
- North America held XX% of global revenue in 2025, supported by established natural-energy beverage distribution and high demand for clean-label caffeine.
- Asia-Pacific will grow at a XX% CAGR through 2031 as functional beverage launches accelerate in China, Japan, South Korea, Australia and Southeast Asia.
- Argentina recorded XXX kilograms of yerba mate leaving mills in 2025, including a record XXX kilograms exported, according to the Instituto Nacional de la Yerba Mate.
- Argentina's 2025 yerba mate exports increased XX% year over year, widening the feedstock and brand-development pipeline available to extract processors.

Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

Global Yerba Mate Extract Market Trends and Growth

Drivers

Yerba mate extract sits at the intersection of botanical ingredients, natural caffeine and functional beverages. Its commercial value is no longer determined solely by the traditional mate taste: buyers increasingly specify caffeine potency, chlorogenic-acid content, solubility, turbidity, color and organic status for use in modern formulation systems.

Demand is expanding faster than the underlying traditional infusion market because each kilogram of standardized extract can address multiple high-value categories. Energy drinks, hydration powders, nootropics, sports supplements and functional foods all reward ingredients that deliver both technical performance and a recognizable plant origin.

The supply side remains anchored in the South American production belt, making agronomy, leaf procurement and inventory discipline strategic capabilities. At the same time, extraction and formulation expertise is distributed globally, creating a competitive market in which origin-integrated processors, multinational botanical houses and cost-focused Asian suppliers pursue different customer tiers.

Growth drivers

Clean-label energy beverage expansion

Energy and hydration brands are widening their ingredient systems beyond synthetic caffeine and conventional coffee extracts. Yerba mate provides a recognizable botanical identity, caffeine functionality and a South American provenance story, increasing its inclusion rate in premium ready-to-drink and powdered beverages.

Natural caffeine substitution

Formulators are using standardized yerba mate extracts to replace part or all of the synthetic caffeine in energy, focus and pre-workout products. Suppliers able to deliver repeatable caffeine potency, rapid solubility and low sensory interference capture higher-margin contracts.

Sports nutrition and nootropic convergence

Sports nutrition is converging with cognitive performance, gaming and everyday productivity. This creates demand for botanical ingredients that can support energy-focused positioning across capsules, stick packs, shots and ready-to-drink products.

Improved solubility and sensory control

Advances in clarification, membrane filtration, spray drying and encapsulation are reducing haze, sediment and bitterness. These improvements enable higher extract loading and make yerba mate practical in clear drinks, gummies and flavor-sensitive products.

Certified organic and traceable supply

Premium brands increasingly require chain-of-custody documentation, organic certification and residue testing from leaf origin through extraction. Integrated suppliers can convert these requirements into longer contracts and higher average selling prices.

Globalization of mate consumption

Consumer exposure through football, wellness culture and branded ready-to-drink products is moving mate beyond its traditional South American base. Familiarity lowers the education burden for new beverage launches and strengthens ingredient demand in Europe, Asia and the Middle East.

Restraints

Leaf price and crop volatility

The commercial crop is concentrated in a limited subtropical production belt, exposing processors to weather, labor and policy shocks. Sharp changes in green-leaf prices compress extraction margins when customer contracts do not provide timely pass-through mechanisms.

Bitter taste and formulation constraints

Native bitterness, dark color and precipitation can restrict dosage in lightly flavored beverages and gummies. Debittering, clarification and masking improve performance but add processing cost and can reduce the clean-label simplicity sought by customers.

Fragmented caffeine and claims regulation

Caffeine warnings, supplement rules and permitted health claims vary by jurisdiction and product format. Brand owners must adapt dosage, labeling and communications market by market, extending commercialization timelines for globally standardized products.

Intense alternative-caffeine competition

Green coffee, guarana, tea and synthetic caffeine offer established specifications and broad supplier networks. Yerba mate must justify its price premium through provenance, sensory differentiation or a broader phytochemical profile.

Quality-control and qualification costs

Buyers require botanical authentication, caffeine standardization, microbiological controls and testing for pesticides, heavy metals and processing contaminants. These requirements raise entry barriers for smaller processors and lengthen onboarding cycles.

Yerba Mate Extract Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Clean-label energy beverage expansion	XXX	XXX	XXX
Natural caffeine substitution	XXX	XXX	XXX
Sports nutrition and nootropic convergence	XXX	XXX	XXX
Improved solubility and sensory control	XXX	XXX	XXX
Certified organic and traceable supply	XXX	XXX	XXX
Globalization of mate consumption	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Leaf price and crop volatility	XXX	XXX	XXX
Bitter taste and formulation constraints	XXX	XXX	XXX
Fragmented caffeine and claims regulation	XXX	XXX	XXX
Intense alternative-caffeine competition	XXX	XXX	XXX
Quality-control and qualification costs	XXX	XXX	XXX

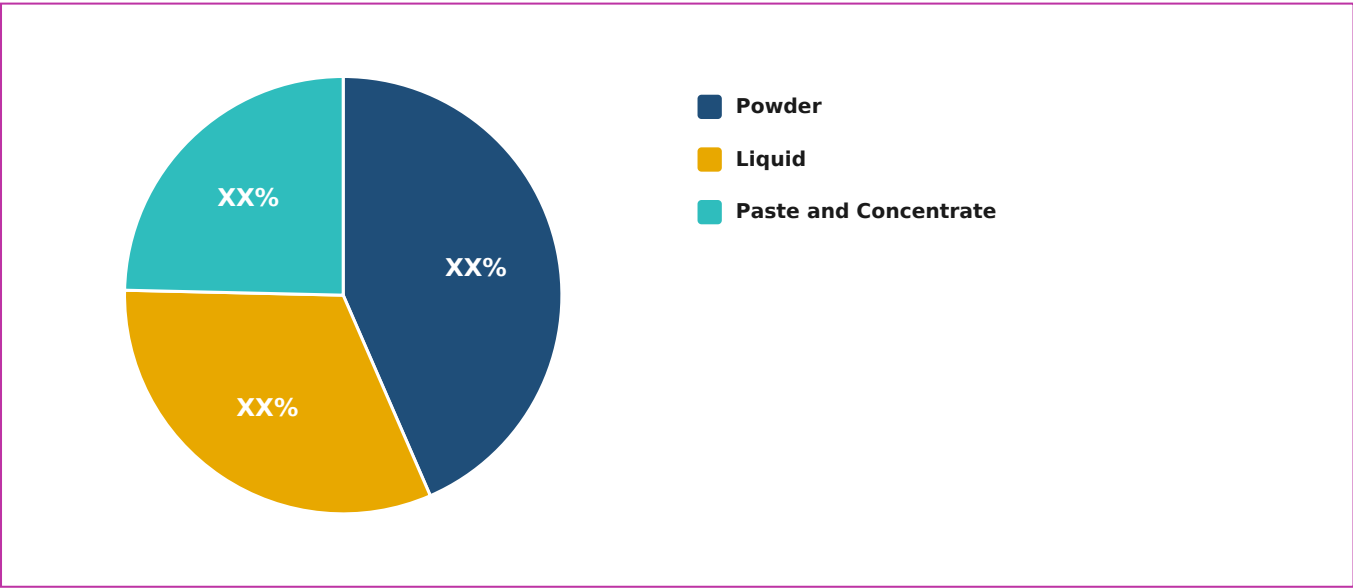
Source: XXX

Yerba Mate Extract Market Segmentation by Form, Extraction and Application

By Form

Powders dominate because spray-dried ingredients are stable, freight-efficient and compatible with supplements, powdered drinks and dry food systems. Liquid extracts are gaining in ready-to-drink production, where rapid dispersion and direct dosing reduce plant handling. Concentrated pastes remain specialized products for flavor-intensive foods and industrial beverage bases.

Value share by form, 2025



Source: XXX

Value by form, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Powder	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Liquid	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Paste and Concentrate	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Extraction Method

Aqueous extraction leads mainstream food and beverage use because it aligns with clean-label positioning and produces familiar mate flavor profiles. Hydroalcoholic systems are important where manufacturers target broader polyphenol recovery or supplement-grade concentration. Supercritical carbon dioxide and other advanced methods grow from a smaller base in selective fractionation and premium standardized

products.

Value by extraction Method, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Water Extraction	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Hydroalcoholic Extraction	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Supercritical CO2 and Other Methods	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Nature

Conventional material remains the volume base for mainstream beverages and cost-sensitive formulations. Organic extract attracts premium pricing in natural retail, sports nutrition and branded functional drinks, particularly in the United States, Canada, Germany and the United Kingdom. Growth depends on certified leaf availability, segregation and residue-management capabilities.

Value by nature, USD bn

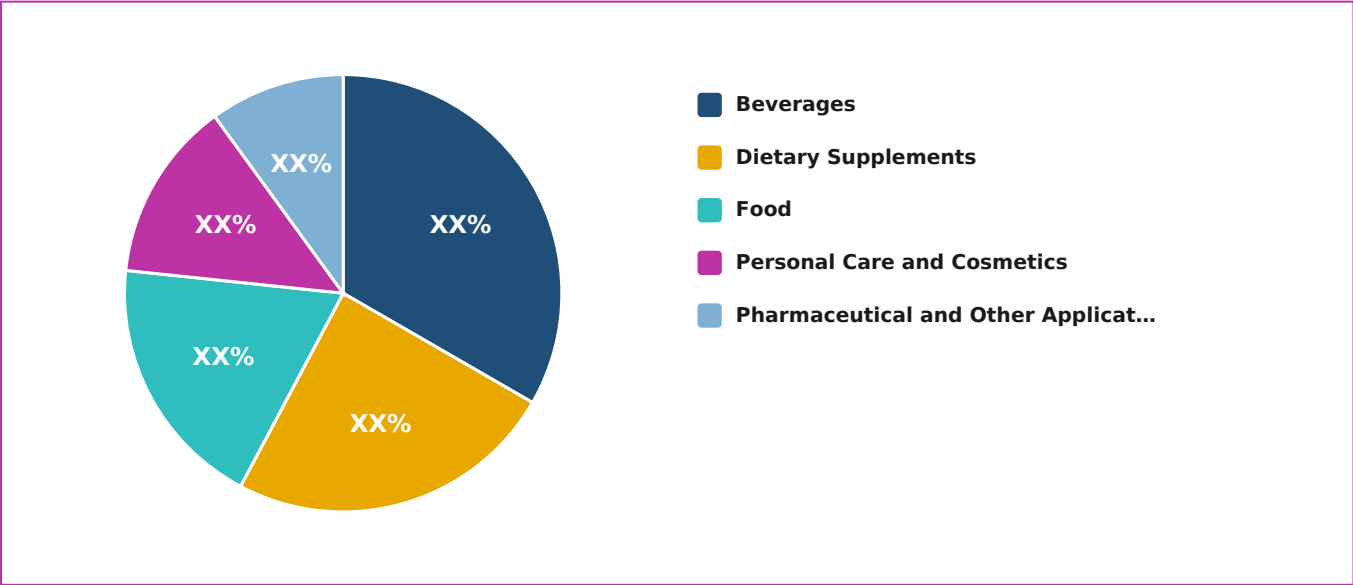
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Conventional	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Organic	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Beverages lead through energy drinks, functional teas, hydration products, concentrates and powdered mixes. Dietary supplements use standardized extracts in capsules, tablets, gummies and pre-workout products, with cognitive-energy positioning supporting above-market growth. Food, personal-care and pharmaceutical applications remain smaller but provide diversification into bars, confectionery, topical antioxidants and specialist formulations.

Value share by application, 2025



Source: XXX

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Beverages	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Dietary Supplements	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Food	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Personal Care and Cosmetics	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Pharmaceutical and Other Applications	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Direct sales dominate multinational beverage, nutrition and food accounts because these customers require technical qualification, customized specifications and contractual supply assurance. Ingredient distributors remain essential for smaller brands, contract manufacturers and markets where suppliers lack local regulatory or warehousing infrastructure. Distributor growth will be strongest in Asia-Pacific and the Middle East.

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Direct Sales	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Distributors and Agents	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

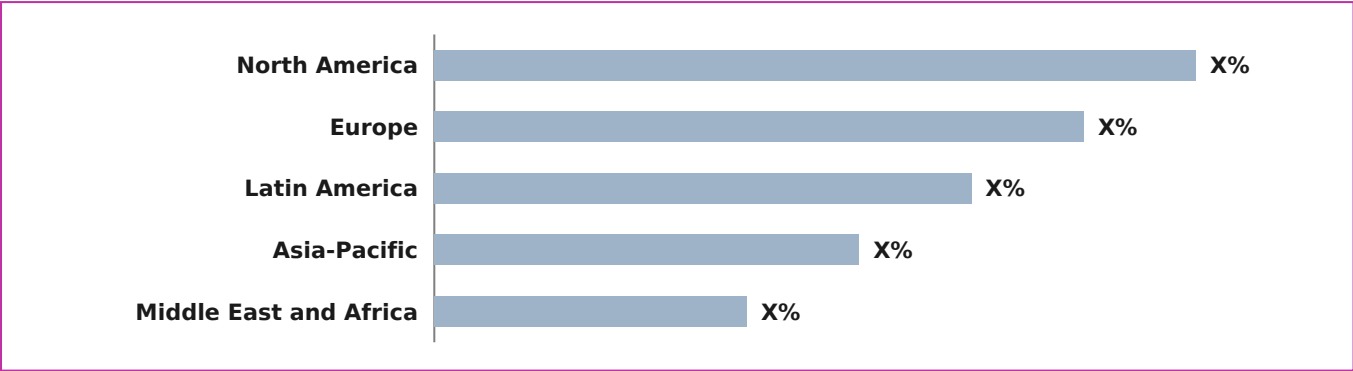
Yerba Mate Extract Market Regional Analysis and Country Outlook

North America generated XX% of global yerba mate extract revenue in 2025. The United States anchors regional demand through natural-energy beverages, sports nutrition, powdered hydration and dietary supplements, while Canada contributes a smaller but premium-oriented organic market. The region's leading customers prioritize water solubility, standardized caffeine, organic certification and documentation suitable for food and supplement compliance.

Europe represented XX% of 2025 revenue, led by Germany, the United Kingdom, France, Italy and Spain. Botanical-extract expertise and sophisticated supplement distribution support adoption, but caffeine labeling and health-claim controls shape formulation decisions. Latin America accounted for XX% of value and remains indispensable to supply: Argentina, Brazil and Paraguay combine commercial leaf production, primary processing capability and established mate consumption.

Asia-Pacific is forecast to expand at a XX% CAGR through 2031, the fastest regional rate. China provides formulation and botanical-extraction scale, Japan and South Korea offer premium functional-drink channels, and Australia has a receptive natural-energy and sports-nutrition consumer base. Middle East and Africa remains smaller but gains from energy-drink demand, modern retail expansion and distributor-led ingredient sales in the Gulf states and South Africa.

Growth rate by region, 2025-2031



Source: XXX

Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

Yerba Mate Extract Market Competitive Landscape and Company Share

The market is moderately concentrated: the five largest suppliers generated an estimated XX% of global revenue in 2025, while regional processors and specialist botanical houses retained substantial share. Scale advantages arise from validated extraction systems, multi-origin procurement, spray-drying capacity, regulatory dossiers and the ability to provide consistent caffeine and polyphenol specifications.

MartinBauer, Givaudan, Döhler and Nexira compete through broad botanical portfolios, global application support and relationships with multinational beverage and nutrition customers. South American companies such as Establecimiento Las Marías and Kraus combine origin access with long-standing mate-processing knowledge, while Asian extraction specialists compete on customization, manufacturing flexibility and cost.

Strategic investment is moving toward clean extraction, microencapsulation, application laboratories and direct sourcing. Downstream launches from Yerba Madre, Mateina, Uncle Matt's Organic and other functional-beverage brands increase customer awareness and strengthen the development pipeline for bulk extracts. Partnerships linking growers, processors and brand owners will become more important as buyers seek traceability and stable multi-year supply.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
MartinBauer	XXX	XXX	XXX	XXX
Givaudan	XXX	XXX	XXX	XXX
Döhler	XXX	XXX	XXX	XXX
Nexira	XXX	XXX	XXX	XXX
Kemin Industries	XXX	XXX	XXX	XXX
Vidya Herbs	XXX	XXX	XXX	XXX
Sabinsa Corporation	XXX	XXX	XXX	XXX
A. Holliday & Company	XXX	XXX	XXX	XXX
Establecimiento Las Marías	XXX	XXX	XXX	XXX
Kraus	XXX	XXX	XXX	XXX

Source: XXX

Yerba Mate Extract Market Forecast and Commercial Opportunities

The market will add USD XXX billion between 2025 and 2031, with most incremental value coming from beverages, supplements and premium organic extracts. Powder will remain the largest form, but liquid extract will grow faster as ready-to-drink producers favor ingredients that shorten mixing cycles and simplify flavor adjustment.

The central forecast assumes continued functional-beverage innovation, stable access to South American leaf and measured price normalization after periods of agricultural volatility. Stronger adoption in Asian beverage systems and faster substitution of synthetic caffeine would lift the 2031 market above the base forecast, while persistent crop disruption and tighter caffeine rules would moderate expansion.

Commercial winners will sell performance rather than undifferentiated botanical powder. Standardized actives, transparent origin, low sediment, controlled bitterness, application-specific formats and defensible sustainability documentation will determine customer retention and pricing power through 2031.

Opportunities

- Low-sugar ready-to-drink energy and hydration products
- Standardized polyphenol extracts for healthy-aging supplements
- Microencapsulated extracts for gummies, bars and powdered nutrition
- Regional extraction capacity near Argentine, Brazilian and Paraguayan feedstock
- Upcycled leaf fractions and lower-temperature extraction processes
- Private-label functional beverages in Asia-Pacific and the Middle East

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