



Global Yerba Mate Market

Market size, segmentation, competitive landscape and outlook

2021-2031

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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Market at a glance

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Indicator	Value
Market size (2025)	USD 2.8 bn
Forecast (2031)	USD 4.4 bn
CAGR (2021-2031)	7.5%
Study period	2021-2031
Largest region	Latin America · 70%
Fastest-growing region	Asia-Pacific · 11.7%
Market concentration	Moderate
Licence	Individual / Company

The global yerba mate market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Traditional loose-leaf products remain the market’s commercial foundation, while ready-to-drink beverages, certified organic supply and premium functional formulations generate the strongest incremental value. Latin America accounted for XX% of 2025 revenue, supported by entrenched consumption in Argentina, Brazil, Paraguay and Uruguay. North American distribution expansion and Asia-Pacific consumer recruitment are widening the category beyond its South American core.

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Executive summary

The global yerba mate market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Traditional loose-leaf products remain the market’s commercial foundation, while ready-to-drink beverages, certified organic supply and premium functional formulations generate the strongest incremental value. Latin America accounted for XX% of 2025 revenue, supported by entrenched consumption in Argentina, Brazil, Paraguay and Uruguay. North American distribution expansion and Asia-Pacific consumer recruitment are widening the category beyond its South American core.

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

Key findings

- The market generated USD XXX billion in 2025 and will reach USD XXX billion in 2031.
- Traditional loose-leaf yerba represented XX% of global 2025 revenue, while ready-to-drink products posted the fastest product CAGR at XX%.
- Latin America held XX% of global value in 2025; Asia-Pacific will grow fastest at an XX% CAGR through 2031.
- Argentina recorded XXX kilograms of combined domestic mill dispatches and exports in 2025, an increase of XX% from 2024, according to INYM.
- Argentina exported a record XXX kilograms in 2025, up XX% year on year, according to INYM.
- Argentine domestic mill dispatches reached XXX kilograms in 2025, XX% above 2024, according to INYM.
- Argentina processed a record XXX kilograms of green leaf in 2024, while its mapped planted area reached XXX hectares in 2025, according to INYM.
- Half-kilogram packs represented XX% of Argentine domestic mill dispatches in December 2025, confirming the continuing importance of accessible household formats.

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 Market Trends and Growth Drivers

Yerba mate is moving from a regionally concentrated staple into a two-speed global category. Traditional loose-leaf consumption supplies dependable volume and repeat purchasing across the Southern Cone and parts of the Middle East, while ready-to-drink beverages and extracts connect the ingredient to the much larger functional-energy economy.

Value creation increasingly depends on format rather than leaf volume alone. Cans, single-serve sachets, standardized extracts and certified organic products carry higher revenue per kilogram and allow producers to reach convenience, digital, foodservice and supplement channels that traditional packaged yerba does not fully address.

Supply economics remain anchored in a narrow botanical production zone. Competitive advantage therefore combines agronomic relationships and drying or aging capability with downstream brand building, formulation, regulatory execution and route-to-market control.

Growth drivers

Natural caffeine gains share in functional beverages

Consumers increasingly seek energy products associated with recognizable botanical ingredients and a smoother usage occasion than conventional energy drinks. Yerba mate gives beverage developers a differentiated caffeine source, a South American provenance story and compatibility with low-sugar formulations, expanding demand among students, professionals and active consumers.

Ready-to-drink distribution broadens category access

Cans and bottles remove the preparation knowledge, equipment and time required for traditional mate. Expansion through convenience, natural grocery, campus and e-commerce channels converts yerba mate from a specialist infusion into an everyday functional beverage.

Organic and regenerative sourcing supports premiumization

Certified organic, fair-trade, shade-grown and regenerative claims strengthen differentiation in markets where loose-leaf tea and functional beverages compete heavily on provenance. Direct grower relationships also support traceability and give brands credible environmental and community narratives.

South American culture travels through sport and migration

Football visibility, diaspora consumption and social-media preparation rituals are turning the gourd and bombilla into recognizable cultural symbols. This expands trial while preserving authenticity, particularly in Europe, the Middle East and North America.

Zero-sugar innovation recruits energy-drink consumers

Brands are reformulating around zero-added-sugar and low-calorie propositions while retaining yerba mate as the primary functional ingredient. The combination addresses sugar avoidance without surrendering

energy, flavor variety or portable packaging.

Soluble extracts unlock industrial applications

Standardized powders and concentrates allow supplement, foodservice and functional-food manufacturers to manage caffeine dosage and formulation consistency. These formats expand the addressable market beyond direct infusion and branded canned beverages.

Restraints

Agricultural supply remains geographically concentrated

Commercial cultivation is concentrated in northeastern Argentina, southern Brazil and Paraguay, exposing processors to localized heat, rainfall and harvest disruptions. Long maturation cycles and specialized processing restrict rapid supply responses when export demand accelerates.

Acquired bitterness limits immediate mainstream trial

Traditional yerba mate has a bitter, vegetal and sometimes smoky sensory profile that differs materially from sweetened tea and mainstream energy drinks. Brands must invest in flavor systems, education and sampling, raising the cost of consumer recruitment.

Preparation rituals constrain convenience

Loose-leaf mate traditionally requires a gourd, bombilla and repeated water additions. The ritual strengthens loyalty among established drinkers but creates friction for new consumers and limits workplace or on-the-go occasions unless brands offer tea bags, cold brew or ready-to-drink alternatives.

Regulatory classification fragments product development

A yerba mate extract can be regulated as a conventional food, caffeinated beverage or supplement depending on formulation and jurisdiction. Different caffeine warnings, ingredient rules and claim standards increase compliance costs and slow multinational launches.

Yerba Mate Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Natural caffeine gains share in functional beverages	XXX	XXX	XXX
Ready-to-drink distribution broadens category access	XXX	XXX	XXX
Organic and regenerative sourcing supports premiumization	XXX	XXX	XXX
South American culture travels through sport and migration	XXX	XXX	XXX
Zero-sugar innovation recruits energy-drink consumers	XXX	XXX	XXX
Soluble extracts unlock industrial applications	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Agricultural supply remains geographically concentrated	XXX	XXX	XXX
Acquired bitterness limits immediate mainstream trial	XXX	XXX	XXX
Preparation rituals constrain convenience	XXX	XXX	XXX
Regulatory classification fragments product development	XXX	XXX	XXX

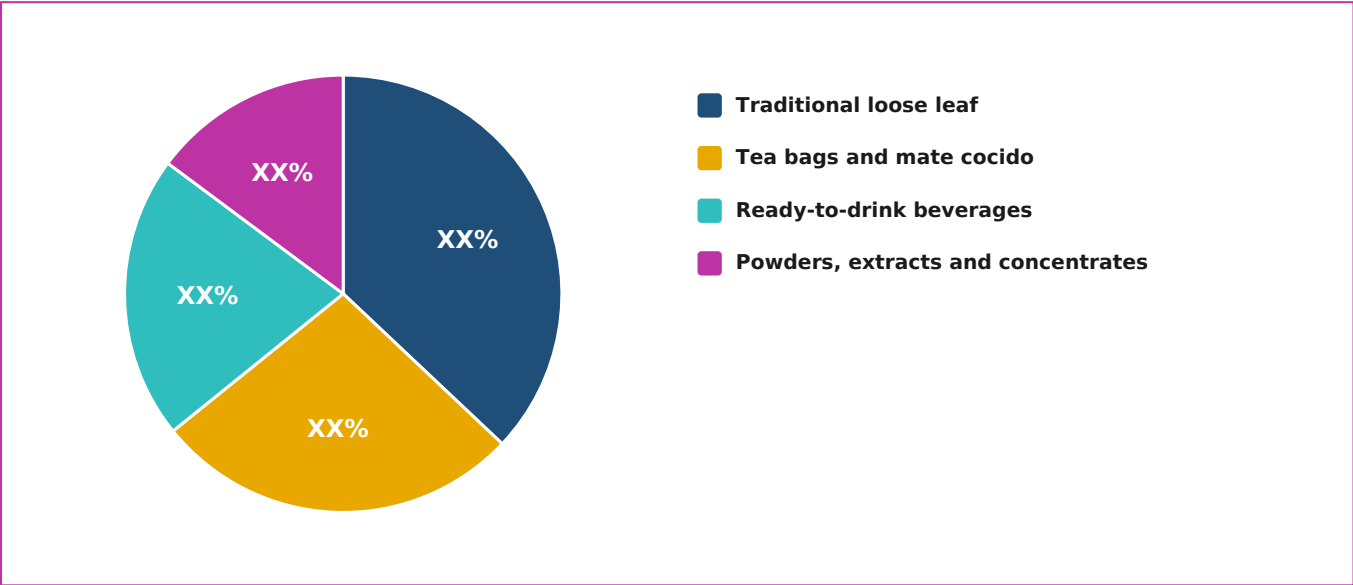
Source: XXX

Yerba Mate Market Segmentation and Revenue Analysis

By Product Type

Loose-leaf yerba remains dominant because it serves habitual consumption in Argentina, Brazil, Paraguay, Uruguay and Middle Eastern export markets. Ready-to-drink beverages are expanding fastest as cans translate mate into natural-energy, convenience and zero-sugar occasions. Extracts and powders gain through supplements, foodservice and standardized industrial formulation.

Value share by product Type, 2025



Source: XXX

Value by product Type, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Traditional loose leaf	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Tea bags and mate cocido	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Ready-to-drink beverages	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Powders, extracts and concentrates	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Certification and Farming Proposition

Conventional material dominates traditional high-volume markets and value-oriented retail. Organic products command a premium in North America and Europe, particularly in tea bags, loose leaf and functional beverages. Regenerative, fair-trade and shade-grown propositions are smaller but grow fastest as brands connect sourcing with Atlantic Forest restoration and grower livelihoods.

Value by certification and Farming Proposition, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Conventional	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Certified organic	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Regenerative, fair-trade and verified shade-grown	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Packaging

Flexible packaging leads through the established half-kilogram and one-kilogram household formats used across the Southern Cone. Paperboard packs remain important for tea bags and premium presentation. Aluminum cans benefit directly from ready-to-drink expansion, while bottles retain a narrower role in cold brew, concentrates and regional soft-drink formats.

Value by packaging, USD bn

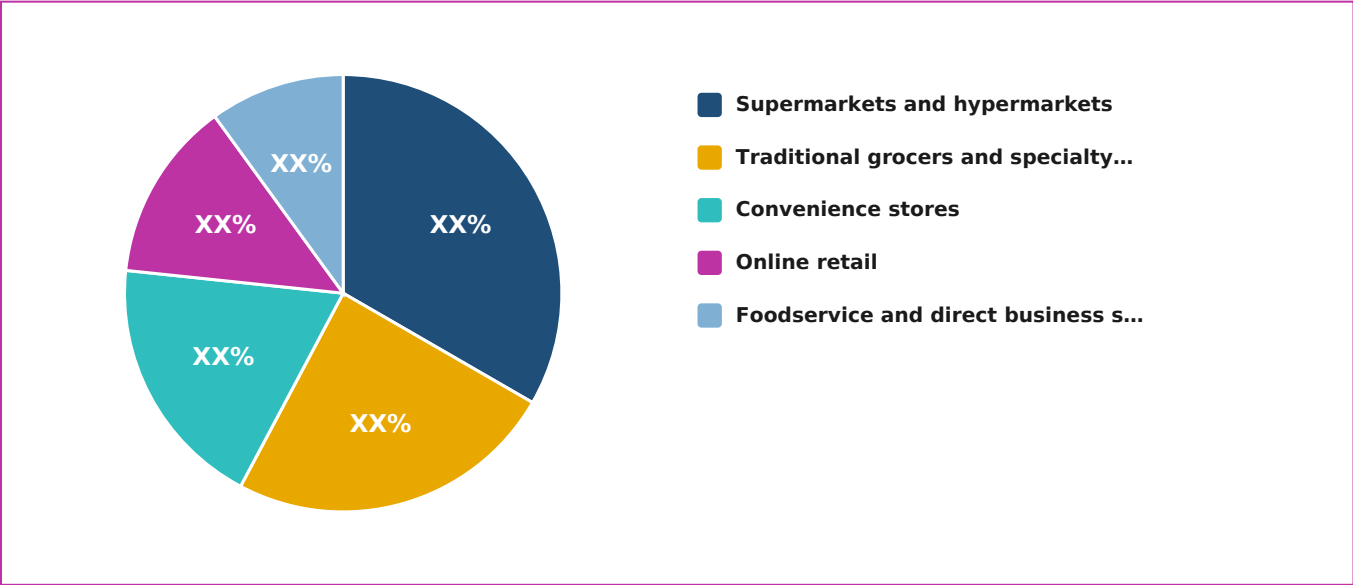
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Flexible pouches and laminated packs	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Paperboard bags and cartons	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Aluminum cans	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Plastic and glass bottles	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Bulk and other formats	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Large-format grocery leads because packaged yerba is a household staple in core markets and increasingly part of natural-beverage sets elsewhere. Traditional grocers and specialty stores remain central to cultural authenticity and imported brands. E-commerce records the highest growth by widening access to niche origins, accessories, subscriptions and multipack ready-to-drink offers.

Value share by distribution Channel, 2025



Source: XXX

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Supermarkets and hypermarkets	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Traditional grocers and specialty stores	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Convenience stores	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Online retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice and direct business sales	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Hot mate, chimarrão, tereré and mate cocido remain the largest application group because of high-frequency household consumption. Functional energy beverages produce the fastest value growth through portable formats and flavored zero-sugar recipes. Supplements, cosmetics and ingredient applications expand from a smaller base where standardized extraction and claim compliance are decisive.

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Traditional hot and cold infusion	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Ready-to-drink functional energy	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Supplements and nutraceuticals	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Cosmetics and personal care	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Food, flavor and foodservice ingredients	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

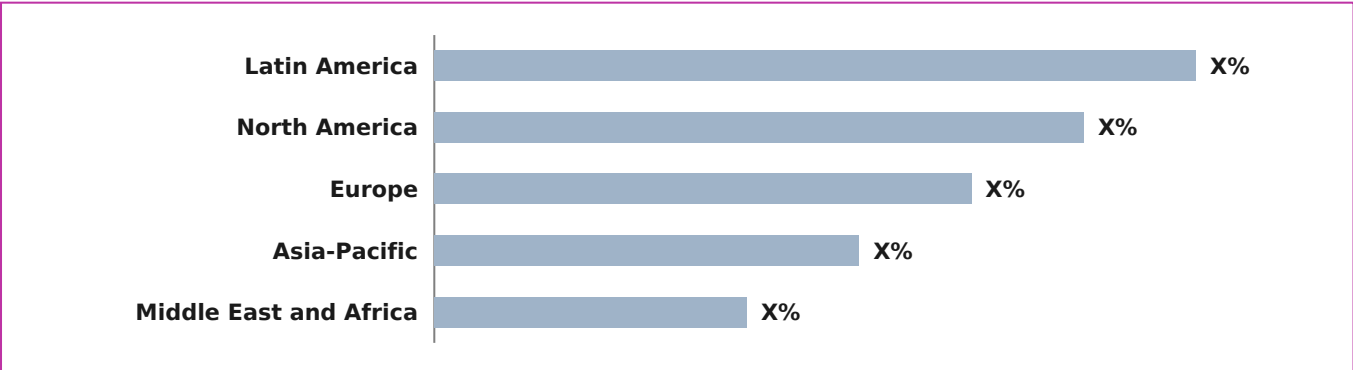
Yerba Mate Market Regional Analysis and Country Outlook

Latin America generated XX% of global yerba mate revenue in 2025 and remains the category’s production, processing and consumption centre. Argentina anchors the regional value pool through its large packaged-leaf market and export platform, while Brazil combines cultivated and native-shade systems with strong chimarrão consumption. Paraguay supplies a distinctive domestic tereré market, and Uruguay sustains exceptionally intensive consumption despite depending primarily on imported processed product.

North America represented XX% of 2025 value and will advance at a XX% CAGR through 2031. Growth is concentrated in canned natural-energy beverages, organic loose leaf and digitally distributed premium brands. Yerba Madre’s reach across more than XXX US and Canadian outlets illustrates how third-party beverage distribution, natural-grocery penetration and convenience access are moving the category into mainstream consumption occasions.

Asia-Pacific is the fastest-growing region at an XX% CAGR, led by urban functional-beverage demand in China, Japan, South Korea and Australia. Europe combines established diaspora demand in Spain with organic and specialty-tea growth in Germany, France and the United Kingdom. Middle Eastern demand remains shaped by traditional loose-leaf consumption, with Syria and Lebanon continuing to absorb a large share of Argentine exports.

Growth rate by region, 2025-2031



Source: XXX

Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	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 Market Competitive Landscape and Company Share

The global market has moderate concentration: leading processors hold strong national franchises, but no single company controls the geographically fragmented traditional-leaf, ready-to-drink and extract businesses. Establecimiento Las Marías, Cooperativa Agrícola de la Colonia Liebig, La Cachuera, Hreňuk, Santa Ana and Productores de Yerba Mate de Santo Pipó are central to Argentine supply, while Barão de Cotegipe and other regional specialists compete in Brazil and Pajarito, Selecta and Campesino lead Paraguayan branded demand.

Competition increasingly separates into two strategic groups. South American incumbents compete through grower networks, milling quality, aging profiles, flavor variants, price ladders and export relationships; functional-beverage challengers compete through formulation, refrigerated or ambient distribution, digital communities and high-velocity single-serve packaging. Yerba Madre’s shift to predominantly third-party distribution and subsequent rebrand demonstrate the scale-building model now shaping North American competition.

Portfolio development is moving toward zero sugar, organic certification, regenerative sourcing and seasonal flavors. Consolidation interest is strongest in functional beverages, illustrated by Safety Shot’s 2025 agreement to acquire Yerbaé. Traditional processors are more likely to pursue export partnerships, capacity optimization and branded extensions than transformative cross-border mergers.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Establecimiento Las Marías	XXX	XXX	XXX	XXX
Cooperativa Agrícola de la Colonia Liebig	XXX	XXX	XXX	XXX
La Cachuera	XXX	XXX	XXX	XXX
Hreňuk	XXX	XXX	XXX	XXX
Productores de Yerba Mate de Santo Pipó	XXX	XXX	XXX	XXX
Santa Ana	XXX	XXX	XXX	XXX
Rosamonte	XXX	XXX	XXX	XXX
Yerba Madre	XXX	XXX	XXX	XXX
Barão de Cotegipe	XXX	XXX	XXX	XXX
Pajarito	XXX	XXX	XXX	XXX

Source: XXX

Yerba Mate Market Forecast, Scenarios and Opportunities

Global value will rise from USD XXX billion in 2025 to USD XXX billion in 2031. Loose-leaf yerba will remain the largest product, but ready-to-drink beverages will capture a disproportionate share of incremental revenue as retailers allocate more space to plant-based energy and consumers adopt portable formats.

The base-case forecast assumes continuing household demand in the Southern Cone, sustained export availability and measured premiumization. The upside scenario is driven by faster convenience-channel distribution, successful zero-sugar launches and accelerated Asian adoption; the downside scenario reflects harvest disruption, sharp leaf-cost inflation and slower repeat purchase outside traditional markets.

Winning suppliers will manage two propositions simultaneously: culturally credible mate for established drinkers and accessible natural energy for new users. Traceable grower programmes, reliable extraction capability, disciplined caffeine communication and market-specific flavor development will determine which companies translate category awareness into durable repeat demand.

Opportunities

- Zero-sugar natural-energy beverages
- Single-serve mate cocido and cold-brew formats
- Regenerative and shade-grown supply programmes
- Foodservice concentrates and café applications
- Standardized extracts for supplements and functional foods
- Localized flavors and entry formats for Asian consumers

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