



Carbonates in Mexico

November 2025

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2025 DEVELOPMENTS

Health trend shaping consumption patterns

INDUSTRY PERFORMANCE

Carbonates hit by concern about impact of sugar intake on health

Reduced sugar options see demand boosted by new regulations

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Carbonates sales will lose momentum with a continuous growth or reduced sugar options

Single-serve and multi-pack options strategy may capture additional revenue

On-trade sales to see continued growth

COMPETITIVE LANDSCAPE

Coca-Cola reinforces lead

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Soft Drinks in Mexico - Industry Overview

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INDUSTRY PERFORMANCE

Challenging economic conditions and weather

Health and wellness a key influence

WHAT'S NEXT?

Political situation causing economic uncertainty

Health and wellness shaping purchasing patterns

Increasingly strict fiscal and regulatory environment

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