



Carbonates in Costa Rica

December 2025

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Carbonates in Costa Rica - Category analysis

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Less tourists has negative impact

INDUSTRY PERFORMANCE

Volume decline driven by fall in tourist numbers

Reduced sugar carbonates gain most volume share

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Muted outlook over forecast period

Marketing and sustainability key driver of volume sales

Health and wellness trends to drive growth for reduced sugar carbonates

COMPETITIVE LANDSCAPE

Coca-Cola FEMSA holds on to commanding lead

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Marketing strategies continue to evolve

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Steady volume growth over forecast period

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