



Soft Drinks in Colombia

December 2025

Table of Contents

EXECUTIVE SUMMARY

Economic volatility, regulatory pressures, and changing consumer needs redefine soft drinks demand in 2025

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Functional and fortified beverages strengthen their position

Health consciousness boosts reduced-sugar products and clean label innovation

Price sensitivity and migration toward discounters and modern retail

WHAT'S NEXT?

Volume recovery expected, though category performance will diverge

Health and functionality will shape innovation pipelines

Digital strategies, influencer collaborations, and direct-to-consumer models gain traction

Event sponsorship and experiential marketing remain priority investments

COMPETITIVE LANDSCAPE

Postobón maintains strong leadership through diversification and distribution

RTD coffee growth led by Procafecol and rising challenger brands

Quala expands across multiple categories with strong, price-competitive brands

CHANNELS

Small local grocers remain key but continue to lose share

Health and beauty specialists emerge as the fastest-growing channel

E-commerce expands gradually with rising promotional sophistication

FOODSERVICE VS RETAIL SPLIT

MARKET DATA

Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 15 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025

Table 16 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025

Table 17 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025

Table 18 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025

Table 19 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 20 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 21 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 22 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 23 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 24 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025
Table 25 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025
Table 26 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025
Table 27 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030
Table 28 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030
Table 29 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030
Table 30 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030
Table 31 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030
Table 32 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030
Table 33 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030
Table 34 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030
Table 35 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030
Table 36 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

APPENDIX

Fountain sales in Colombia

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

[Bottled Water in Colombia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Bottled water declines after the 2024 heatwave surge, while flavoured water continues to outperform

INDUSTRY PERFORMANCE

Retail volume sales of bottled water decreased in 2025

Flavoured bottled water benefits from health-driven indulgence and category diversification

WHAT'S NEXT?

Retail volume sales of bottled water are expected to recover and grow over the forecast period

Digital commerce strengthens Postobón's reach and price competitiveness

Functional hydration expands as consumers seek added benefits beyond basic water

COMPETITIVE LANDSCAPE

Postobón consolidates leadership through high penetration and kid-focused flavour innovation

Private label gains momentum through competitive pricing and flavour variety

CHANNELS

Traditional trade remains dominant but continues to lose share as consumers migrate to value-focused channels

Discounters lead growth as expansion and low prices attract both brands and consumers

CATEGORY DATA

Table 37 - Off-trade Sales of Bottled Water by Category: Volume 2020-2025
Table 38 - Off-trade Sales of Bottled Water by Category: Value 2020-2025
Table 39 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2020-2025
Table 40 - Off-trade Sales of Bottled Water by Category: % Value Growth 2020-2025
Table 41 - NBO Company Shares of Off-trade Bottled Water: % Volume 2021-2025
Table 42 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2022-2025
Table 43 - NBO Company Shares of Off-trade Bottled Water: % Value 2021-2025
Table 44 - LBN Brand Shares of Off-trade Bottled Water: % Value 2022-2025

Table 45 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2025-2030

Table 46 - Forecast Off-trade Sales of Bottled Water by Category: Value 2025-2030

Table 47 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2025-2030

Table 48 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Carbonates in Colombia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Health tax escalation, milder weather and healthier rivals weigh on carbonates

INDUSTRY PERFORMANCE

Health tax and cooler weather drive a decline in carbonate consumption

Indulgent non-cola flavours and reduced sugar lines cushion the downturn

WHAT'S NEXT?

Carbonates set for near-stagnant growth as frequency moderates but habits persist

Collaborations and digital campaigns deepen emotional ties with core users

Functional carbonates to remain niche but support value growth

COMPETITIVE LANDSCAPE

FEMSA Coca-Cola strengthens leadership through coverage, innovation and pack strategy

Bavaria posts strongest growth with successful reduced sugar Pony Go

CHANNELS

Traditional trade remains key but steadily cedes share to value-focused modern retail

Discounters lead growth as brands embrace small and family-size pack formats

CATEGORY DATA

Table 49 - Off-trade vs On-trade Sales of Carbonates: Volume 2020-2025

Table 50 - Off-trade vs On-trade Sales of Carbonates: Value 2020-2025

Table 51 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2020-2025

Table 52 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2020-2025

Table 53 - Off-trade Sales of Carbonates by Category: Volume 2020-2025

Table 54 - Off-trade Sales of Carbonates by Category: Value 2020-2025

Table 55 - Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025

Table 56 - Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025

Table 57 - Total Sales of Carbonates by Fountain On-trade: Volume 2020-2025

Table 58 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2020-2025

Table 59 - NBO Company Shares of Off-trade Carbonates: % Volume 2021-2025

Table 60 - LBN Brand Shares of Off-trade Carbonates: % Volume 2022-2025

Table 61 - NBO Company Shares of Off-trade Carbonates: % Value 2021-2025

Table 62 - LBN Brand Shares of Off-trade Carbonates: % Value 2022-2025

Table 63 - Forecast Off-trade Sales of Carbonates by Category: Volume 2025-2030

Table 64 - Forecast Off-trade Sales of Carbonates by Category: Value 2025-2030

Table 65 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2025-2030

Table 66 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2025-2030

Table 67 - Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2025-2030

Table 68 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Concentrates in Colombia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Market dynamics shaped by economic pressures and shifting consumption habits

INDUSTRY PERFORMANCE

Retail volume declines as purchasing priorities continue to shift

Powder concentrates remained the most dynamic category within concentrates in 2025, despite declining volume.

WHAT'S NEXT?

Retail volume sales of concentrates are expected to fall over the forecast period

Flavour-led innovation expected to dominate, while added-value opportunities remain limited

Adjacent powder formats gain relevance as sports nutrition grows in specialised channels

COMPETITIVE LANDSCAPE

Quala builds category leadership through flavour innovation and widespread distribution

Quala remains the most dynamic company in a declining category

CHANNELS

Traditional grocers remain the strongest channel despite growing competitive pressures

Discounters show limited interest in private label concentrates as category appeal wanes

Concentrates Conversions

Summary 2 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

CATEGORY DATA

Table 69 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025

Table 70 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2020-2025

Table 71 - Off-trade Sales of Concentrates by Category: Value 2020-2025

Table 72 - Off-trade Sales of Concentrates by Category: % Value Growth 2020-2025

Table 73 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2022-2025

Table 74 - NBO Company Shares of Off-trade Concentrates: % Value 2021-2025

Table 75 - LBN Brand Shares of Off-trade Concentrates: % Value 2022-2025

Table 76 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2025

Table 77 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2022-2025

Table 78 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2025

Table 79 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2022-2025

Table 80 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2025-2030

Table 81 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2025-2030

Table 82 - Forecast Off-trade Sales of Concentrates by Category: Value 2025-2030

Table 83 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Juice in Colombia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Juice demand declines as consumers favour healthier and more affordable alternatives

INDUSTRY PERFORMANCE

Retail volume sales of juice continued to decline in 2025

100% juice grows as consumers seek clean labels and value through private label

WHAT'S NEXT?

Retail volume sales of juice are expected to see slight decline over the forecast period

Digital transformation accelerates Postobón's omnichannel presence

Functional juices for adults remain niche but poised for long-term opportunity

COMPETITIVE LANDSCAPE

Postobón maintains leadership despite reformulation challenges and share loss

Pepsi-Cola strengthens its presence through partnerships as Country Hill exits the category

CHANNELS

Traditional trade remains dominant but loses share as consumers seek better value

Discounters lead growth with expanding coverage and strong private label

CATEGORY DATA

Table 84 - Off-trade Sales of Juice by Category: Volume 2020-2025

Table 85 - Off-trade Sales of Juice by Category: Value 2020-2025

Table 86 - Off-trade Sales of Juice by Category: % Volume Growth 2020-2025

Table 87 - Off-trade Sales of Juice by Category: % Value Growth 2020-2025

Table 88 - NBO Company Shares of Off-trade Juice: % Volume 2021-2025

Table 89 - LBN Brand Shares of Off-trade Juice: % Volume 2022-2025

Table 90 - NBO Company Shares of Off-trade Juice: % Value 2021-2025

Table 91 - LBN Brand Shares of Off-trade Juice: % Value 2022-2025

Table 92 - Forecast Off-trade Sales of Juice by Category: Volume 2025-2030

Table 93 - Forecast Off-trade Sales of Juice by Category: Value 2025-2030

Table 94 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2025-2030

Table 95 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[RTD Coffee in Colombia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Early-stage category expands through local innovation and digital engagement

INDUSTRY PERFORMANCE

Strong double-digit gains powered by local brands and new consumption occasions

Concentrated cold brew and flavoured lattes were the most dynamic formats in 2025

WHAT'S NEXT?

Rapid growth ahead supported by innovation, new occasions and functional positioning

Innovation in concentrated and versatile formats will unlock broader use occasions

Functional and natural ingredient trends will shape future RTD coffee innovation

COMPETITIVE LANDSCAPE

Juan Valdez strengthens leadership as premium local brands expand

Veda Drinks drives premium growth with Samsara, though limited by high price points

CHANNELS

Modern retail leads while traditional trade and discounters remain underdeveloped

Shelf expansion and category education support growth in modern retail

CATEGORY DATA

Table 96 - Off-trade Sales of RTD Coffee: Volume 2020-2025

Table 97 - Off-trade Sales of RTD Coffee: Value 2020-2025

Table 98 - Off-trade Sales of RTD Coffee: % Volume Growth 2020-2025

Table 99 - Off-trade Sales of RTD Coffee: % Value Growth 2020-2025

Table 100 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2021-2025

Table 101 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2022-2025

Table 102 - NBO Company Shares of Off-trade RTD Coffee: % Value 2021-2025

Table 103 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2022-2025

Table 104 - Forecast Off-trade Sales of RTD Coffee: Volume 2025-2030

Table 105 - Forecast Off-trade Sales of RTD Coffee: Value 2025-2030

Table 106 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2025-2030

Table 107 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

RTD Tea in Colombia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Innovation in flavours and sugar reduction supports modest recovery

INDUSTRY PERFORMANCE

Stable volumes amid competition from flavoured water

Still RTD tea remained the most dynamic category in 2025

WHAT'S NEXT?

Steady growth ahead driven by sugar reduction and flavour innovation

Digital platforms and e-commerce strengthen brand reach and consumer engagement

Health-driven reformulation and emerging consumption occasions will shape category growth

COMPETITIVE LANDSCAPE

Postobón reinforces leadership through strong distribution and differentiated brand strategies

Private label and emerging brands bring new dynamism to the category

CHANNELS

Traditional grocers remain important but continue losing share to discounters

Discounters grow rapidly, supported by store expansion and diversified assortments

CATEGORY DATA

Table 108 - Off-trade Sales of RTD Tea by Category: Volume 2020-2025

Table 109 - Off-trade Sales of RTD Tea by Category: Value 2020-2025

Table 110 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2020-2025

Table 111 - Off-trade Sales of RTD Tea by Category: % Value Growth 2020-2025

Table 112 - Leading Flavours for Off-trade RTD Tea: % Volume 2020-2025

Table 113 - NBO Company Shares of Off-trade RTD Tea: % Volume 2021-2025

Table 114 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2022-2025

Table 115 - NBO Company Shares of Off-trade RTD Tea: % Value 2021-2025

Table 116 - LBN Brand Shares of Off-trade RTD Tea: % Value 2022-2025

Table 117 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2025-2030

Table 118 - Forecast Off-trade Sales of RTD Tea by Category: Value 2025-2030

Table 119 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2025-2030

Table 120 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Energy Drinks in Colombia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Health taxes and shifting consumption habits reshape the energy drinks landscape

INDUSTRY PERFORMANCE

Retail volume sales of energy drinks decreased in 2025
Regular and reduced-sugar formats show similar trends amid rising preference for rehydration solutions

WHAT'S NEXT?

Retail volume outlook for the forecast period
Digital engagement and marketing strategies
Functional positioning and evolving consumer preferences

COMPETITIVE LANDSCAPE

Postobón maintains leadership but faces intensifying competition from low-priced brands
Quala emerges as the strongest performer through value pricing and cultural partnerships

CHANNELS

Traditional trade remains the main channel despite pressures, while e-commerce gradually gains relevance
Convenience stores expand strongly with nationwide chain growth

CATEGORY DATA

- Table 121 - Off-trade Sales of Energy Drinks: Volume 2020-2025
- Table 122 - Off-trade Sales of Energy Drinks: Value 2020-2025
- Table 123 - Off-trade Sales of Energy Drinks: % Volume Growth 2020-2025
- Table 124 - Off-trade Sales of Energy Drinks: % Value Growth 2020-2025
- Table 125 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2021-2025
- Table 126 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2022-2025
- Table 127 - NBO Company Shares of Off-trade Energy Drinks: % Value 2021-2025
- Table 128 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2022-2025
- Table 129 - Forecast Off-trade Sales of Energy Drinks: Volume 2025-2030
- Table 130 - Forecast Off-trade Sales of Energy Drinks: Value 2025-2030
- Table 131 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2025-2030
- Table 132 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Sports Drinks in Colombia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Strong demand for rehydration solutions drives exceptional category growth

INDUSTRY PERFORMANCE

Retail volume sales of sports drinks increased in 2025
Oral rehydration solutions were the most dynamic category in 2025

WHAT'S NEXT?

Retail volume sales of sports drinks are expected to continue rising over the forecast period
Digital commerce and app-based delivery will play a growing role in shaping consumption
Health, natural ingredients and format innovation will guide future product development

COMPETITIVE LANDSCAPE

Gatorade retains leadership through strong distribution, sports associations and expanded ORS positioning

Hidra Tao achieves fastest growth through repositioning and strategic sports sponsorships

CHANNELS

Traditional trade remains essential, but e-commerce adoption continues to grow

Health and beauty specialists are the fastest-growing channel

CATEGORY DATA

Table 133 - Off-trade Sales of Sports Drinks: Volume 2020-2025

Table 134 - Off-trade Sales of Sports Drinks: Value 2020-2025

Table 135 - Off-trade Sales of Sports Drinks: % Volume Growth 2020-2025

Table 136 - Off-trade Sales of Sports Drinks: % Value Growth 2020-2025

Table 137 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2021-2025

Table 138 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2022-2025

Table 139 - NBO Company Shares of Off-trade Sports Drinks: % Value 2021-2025

Table 140 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2022-2025

Table 141 - Forecast Off-trade Sales of Sports Drinks: Volume 2025-2030

Table 142 - Forecast Off-trade Sales of Sports Drinks: Value 2025-2030

Table 143 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2025-2030

Table 144 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/soft-drinks-in-colombia/report.