



Carbonates in Colombia

December 2025

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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

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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 Procafécol 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

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