



Euromonitor
International

Energy Drinks in Colombia

December 2025

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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

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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 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

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