



Carbonates in Bolivia

December 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Carbonates is impacted by heatwaves, digitisation and sugar supply pressures.

INDUSTRY PERFORMANCE

Carbonates sees continued growth, boosted by availability of affordable formats

Lemonade/lime leads growth

WHAT'S NEXT?

Sustained growth through climate impact, heritage and affordable choices

Digitalisation will drive retailer and consumer engagement

Sugar supply issues will impact carbonates

COMPETITIVE LANDSCAPE

EMBOL retains its lead, ahead of CBN

Small local players gain traction

CHANNELS

Small local grocers remains key channel

Hypermarkets lead growth with broadest product selections

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Affordability remains key driver of growth

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Climatic factors underpin steady consumption amid growing diversification

Affordability remains key consideration

Health-focused offerings gain traction

WHAT'S NEXT?

Shifting consumer lifestyles and infrastructure investments will support future growth

Health and wellness trend to drive innovation

Growing focus on local production

COMPETITIVE LANDSCAPE

EMBOL maintains leadership through extensive reach, innovation and digital investment

DICOM Distribuidores del Oriente benefits from growing success of Aloe Vera Tai, while PepsiCo expands sales through innovation and widening distribution

CHANNELS

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Foodservice vs retail split

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