



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

WHAT'S NEXT?

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

Florida Bebidas lies in second place

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Health and wellness claims enter the mainstream

Marketing strategies continue to evolve

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Steady volume growth over forecast period

Two US companies continue to lead

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