



Euromonitor
International

Soft Drinks in Colombia

December 2025

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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

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Retail volume sales of bottled water decreased in 2025

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WHAT'S NEXT?

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Digital commerce strengthens Postobón's reach and price competitiveness

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COMPETITIVE LANDSCAPE

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

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INDUSTRY PERFORMANCE

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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

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INDUSTRY PERFORMANCE

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

WHAT'S NEXT?

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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

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[RTD Coffee in Colombia](#)

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2025 DEVELOPMENTS

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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

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KEY DATA FINDINGS

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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

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Postobón maintains leadership but faces intensifying competition from low-priced brands
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Oral rehydration solutions were the most dynamic category in 2025

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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

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