



RTD Tea in Colombia

December 2025

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RTD Tea in Colombia - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

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

Private label and emerging brands bring new dynamism to the category

CHANNELS

Traditional grocers remain important but continue losing share to discounters

Discounters grow rapidly, supported by store expansion and diversified assortments

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Soft Drinks in Colombia - Industry Overview

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

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