



Carbonates in Guatemala

December 2025

Table of Contents

KEY DATA FINDINGS

2025 DEVELOPMENTS

Carbonates remains largest category

INDUSTRY PERFORMANCE

Carbonates continues growing, driven by association with indulgence and product variety

Regular cola carbonates lead volume growth

WHAT'S NEXT?

Carbonates set for steady growth amid rising preference for larger, value-oriented formats

Functional carbonates could gain traction amongst health-conscious consumers

Players will expand sustainability programmes

COMPETITIVE LANDSCAPE

Global players seek to forge connections with new generations

Coca-Cola de Guatemala drives growth through expanded reach, affordable formats and digitalisation

CHANNELS

Small local grocers leads distribution

Discounters and convenience retailers gain traction

CATEGORY DATA

Table 1 - Off-trade vs On-trade Sales of Carbonates: Volume 2020-2025

Table 2 - Off-trade vs On-trade Sales of Carbonates: Value 2020-2025

Table 3 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2020-2025

Table 4 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2020-2025

Table 5 - Off-trade Sales of Carbonates by Category: Volume 2020-2025

Table 6 - Off-trade Sales of Carbonates by Category: Value 2020-2025

Table 7 - Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025

Table 8 - Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025

Table 9 - Sales of Carbonates by Total Fountain On-trade: Volume 2020-2025

Table 10 - Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2020-2025

Table 11 - NBO Company Shares of Off-trade Carbonates: % Volume 2021-2025

Table 12 - LBN Brand Shares of Off-trade Carbonates: % Volume 2022-2025

Table 13 - NBO Company Shares of Off-trade Carbonates: % Value 2021-2025

Table 14 - LBN Brand Shares of Off-trade Carbonates: % Value 2022-2025

Table 15 - Forecast Off-trade Sales of Carbonates by Category: Volume 2025-2030

Table 16 - Forecast Off-trade Sales of Carbonates by Category: Value 2025-2030

Table 17 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2025-2030

Table 18 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2025-2030

Table 19 - Forecast Sales of Carbonates by Total Fountain On-trade: Volume 2025-2030

Table 20 - Forecast Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Soft Drinks in Guatemala - Industry Overview

EXECUTIVE SUMMARY

Affordability continues to drive soft drinks preferences

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Modest growth as economic conditions improve but consumers remain price conscious
Continued strong demand for carbonates and bottled water
Rising demand for functional hydration and better-for-you options

WHAT'S NEXT?

Climate-driven hydration needs to support steady growth for soft drinks
Health and wellness trends will impact soft drinks preferences
Experiential beverages and AI-powered marketing will connect with young consumers

COMPETITIVE LANDSCAPE

Cola-Cola consolidates its lead, ahead of local challengers
Embotelladora Centroamericana leads growth through Gatorade innovation

CHANNELS

Small local grocers remains core distribution channel
Discounters and convenience stores gain ground
Foodservice vs retail split

MARKET DATA

Table 21 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025
Table 22 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025
Table 23 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025
Table 24 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025
Table 25 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025
Table 26 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025
Table 27 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025
Table 28 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025
Table 29 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025
Table 30 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025
Table 31 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025
Table 32 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025
Table 33 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025
Table 34 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025
Table 35 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025
Table 36 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025
Table 37 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025
Table 38 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025
Table 39 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025
Table 40 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025
Table 41 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025
Table 42 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025
Table 43 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030
Table 44 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030
Table 45 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030
Table 46 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030
Table 47 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030
Table 48 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030
Table 49 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030
Table 50 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030
Table 51 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030
Table 52 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/carbonates-in-guatemala/report.