



Euromonitor
International

Carbonates in Ecuador

December 2025

Table of Contents

KEY DATA FINDINGS

2025 DEVELOPMENTS

A negative performance for carbonates in Ecuador, caused by several reasons

INDUSTRY PERFORMANCE

Weather, political uncertainty, and retail challenges impact performance

Reduced sugar options are generally preferred, while regular tonic water benefit from demand for mixers

WHAT'S NEXT?

Flat growth expected due to category maturity and channel shifts

Marketing as a key differentiator in a saturated carbonates market

Health and wellness as a structural challenge for carbonates

COMPETITIVE LANDSCAPE

Coca-Cola maintains strong lead thanks to well-known brand portfolio and distribution reach of Arca Continental

Tesalia Spring benefits from Pepsi's more affordable price compared to Coca-Cola

CHANNELS

Small local grocers remains the most relevant channel, thanks to capacity for chilled goods inspiring impulse purchases

Discounters channel sees strongest growth from a low base

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 Ecuador - Industry Overview

EXECUTIVE SUMMARY

Sales of soft drinks fall into negative-figure slumps in Ecuador in 2025

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Price sensitivity becomes notably decisive in consumer behaviour

Functional needs drive selective growth in niche areas

Retail channels appeal to different consumer needs

WHAT'S NEXT?

Sales will stabilise and see moderate growth over the forecast period

Major players will leverage product innovation and marketing strategies

Channel dynamics will remain a critical driver of growth

COMPETITIVE LANDSCAPE

Coca-Cola maintains strong leading place thanks to powerhouse brands and regional support of Arca Continental

Genommalab taps into demand for hydration, recovery, and functional beverages with Suerox

CHANNELS

Small local grocers maintain relevance, despite growing share of other retail channels

Discounters sees robust channel growth, thanks to expansion of Las Tiendas Tuti

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

SOURCES

Summary 1 - Research Sources

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