



Bottled Water in Colombia

December 2025

Table of Contents

KEY DATA FINDINGS

2025 DEVELOPMENTS

Bottled water declines after the 2024 heatwave surge, while flavoured water continues to outperform

INDUSTRY PERFORMANCE

Retail volume sales of bottled water decreased in 2025
Flavoured bottled water benefits from health-driven indulgence and category diversification

WHAT'S NEXT?

Retail volume sales of bottled water are expected to recover and grow over the forecast period
Digital commerce strengthens Postobón's reach and price competitiveness
Functional hydration expands as consumers seek added benefits beyond basic water

COMPETITIVE LANDSCAPE

Postobón consolidates leadership through high penetration and kid-focused flavour innovation
Private label gains momentum through competitive pricing and flavour variety

CHANNELS

Traditional trade remains dominant but continues to lose share as consumers migrate to value-focused channels
Discounters lead growth as expansion and low prices attract both brands and consumers

CATEGORY DATA

- Table 1 - Off-trade Sales of Bottled Water by Category: Volume 2020-2025
- Table 2 - Off-trade Sales of Bottled Water by Category: Value 2020-2025
- Table 3 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2020-2025
- Table 4 - Off-trade Sales of Bottled Water by Category: % Value Growth 2020-2025
- Table 5 - NBO Company Shares of Off-trade Bottled Water: % Volume 2021-2025
- Table 6 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2022-2025
- Table 7 - NBO Company Shares of Off-trade Bottled Water: % Value 2021-2025
- Table 8 - LBN Brand Shares of Off-trade Bottled Water: % Value 2022-2025
- Table 9 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2025-2030
- Table 10 - Forecast Off-trade Sales of Bottled Water by Category: Value 2025-2030
- Table 11 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2025-2030
- Table 12 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

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 Procafecol 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

MARKET DATA

Table 13 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025
Table 14 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025
Table 15 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025
Table 16 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025
Table 17 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025
Table 18 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025
Table 19 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025
Table 20 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025
Table 21 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025
Table 22 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025
Table 23 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025
Table 24 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025
Table 25 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025
Table 26 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025
Table 27 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025
Table 28 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025
Table 29 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025
Table 30 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025
Table 31 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025
Table 32 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025
Table 33 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025
Table 34 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025
Table 35 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025
Table 36 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025
Table 37 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025
Table 38 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025
Table 39 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030
Table 40 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030
Table 41 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030
Table 42 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030
Table 43 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030
Table 44 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030
Table 45 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030
Table 46 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030
Table 47 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030
Table 48 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

APPENDIX

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

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/bottled-water-in-colombia/report.