



Euromonitor
International

Carbonates in Colombia

December 2025

Table of Contents

KEY DATA FINDINGS

2025 DEVELOPMENTS

Health tax escalation, milder weather and healthier rivals weigh on carbonates

INDUSTRY PERFORMANCE

Health tax and cooler weather drive a decline in carbonate consumption
Indulgent non-cola flavours and reduced sugar lines cushion the downturn

WHAT'S NEXT?

Carbonates set for near-stagnant growth as frequency moderates but habits persist
Collaborations and digital campaigns deepen emotional ties with core users
Functional carbonates to remain niche but support value growth

COMPETITIVE LANDSCAPE

FEMSA Coca-Cola strengthens leadership through coverage, innovation and pack strategy
Bavaria posts strongest growth with successful reduced sugar Pony Go

CHANNELS

Traditional trade remains key but steadily cedes share to value-focused modern retail
Discounters lead growth as brands embrace small and family-size pack formats

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 - Total Sales of Carbonates by Fountain On-trade: Volume 2020-2025
- Table 10 - Total Sales of Carbonates by 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 Total Sales of Carbonates by Fountain On-trade: Volume 2025-2030
- Table 20 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2025-2030

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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

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 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 Total Soft Drinks (RTD): % Volume 2021-2025
Table 36 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025
Table 37 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025
Table 38 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025
Table 39 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025
Table 40 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025
Table 41 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025
Table 42 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025
Table 43 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025
Table 44 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025
Table 45 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025
Table 46 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025
Table 47 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030
Table 48 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030
Table 49 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030

Table 50 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 51 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030

Table 52 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030

Table 53 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030

Table 54 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

Table 55 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

Table 56 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

APPENDIX

Fountain sales in Colombia

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

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