



Hot Drinks in Guatemala

December 2025

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EXECUTIVE SUMMARY

Guatemalans balance affordability with premium choices

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Positive economic conditions fuel value growth but consumers remain price sensitive

Affordability continues to shape coffee purchasing habits although premium variants gain traction

Innovation in cold, functional and origin-driven hot drinks targets younger generations

WHAT'S NEXT?

Coffee will see sustained demand, thanks to development of local production

Tea will benefit from wellness focus

Flavoured powder drinks will struggle to maintain relevance

COMPETITIVE LANDSCAPE

Nestlé strengthens its leadership through affordability-driven strategy

Walmart gains ground as value-seeking intensifies, while branded players strengthen emotional and quality-led strategies

CHANNELS

Small local grocers continue to lead sales

Convenience stores show dynamism

Foodservice vs retail split

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KEY DATA FINDINGS

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Strong cultural tradition sustains coffee demand

INDUSTRY PERFORMANCE

Demand for coffee remains resilient, despite rising prices

Fresh ground coffee pods leads growth

WHAT'S NEXT?

Younger consumers will sustain coffee consumption

Continued diversification with cold brew coffee options, as players seek to connecting with the preferences of younger generations

State support and sustainability initiatives to drive growth

COMPETITIVE LANDSCAPE

INCASA maintains leadership but faces growing pressure from Nestlé.

Walmart expands its presence, while Nescafé strengthens its position through focus on local identity and diversification

CHANNELS

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INDUSTRY PERFORMANCE

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Green and herbal teas drive growth

WHAT'S NEXT?

Scope to build consumption habits amongst younger generations

Functional innovations will drive wellness-oriented consumption

Local tea production will expand with wellness-focused offerings

COMPETITIVE LANDSCAPE

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2025 DEVELOPMENTS

Other hot drinks face pressure from coffee and RTD offerings

INDUSTRY PERFORMANCE

Other hot drinks lose ground to coffee and more convenient alternatives

Flavoured powder drinks leads growth

WHAT'S NEXT?

Other hot drinks will be impacted by Guatemalans' growing preference for RTD beverages and a declining birth rate

Innovations balance nutritional functionality with indulgence

Sustainability and health will be key growth drivers in other plant-based hot drinks

COMPETITIVE LANDSCAPE

Leading brands focus on convenience and nutritional value

Choco Panda gains traction

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