



Euromonitor
International

Hot Drinks in Ecuador

December 2025

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EXECUTIVE SUMMARY

Value sales rebound due to high prices, while volume consumption remains in a slump overall

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

High prices of coffee and cocoa boost value sales, while consumers seek cost savings

Leading players attract consumers to fresh coffee with smaller formats at more affordable prices

Foodservice sees positive volume growth, helping to support total category performance

WHAT'S NEXT?

Volume sales of hot drinks will recover to a flat performance

Consumer awareness and lifestyle trends will boost interest in fresh coffee and functional teas

Health and wellness trends create challenges for high-sugar other hot drinks

COMPETITIVE LANDSCAPE

GBO Grupo Empresarial Mariposa Corp benefits from being the owner of leading local players

Players benefit from targeted offerings and offering smaller pack sizes to meet different consumer budgets

CHANNELS

Small local grocers continue to benefit from affordable options and pack sizes to fit all budgets

Discounters channel sees triple-digit channel growth, thanks to expansion of Las Tiendas Tuti

Foodservice vs retail split

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[Coffee in Ecuador](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Healthy value growth driven by high prices, while volume remains in a slump

INDUSTRY PERFORMANCE

Players turn to shrinkflation to attract sales midst high coffee prices

Polarisation seen with consumers willing to trade up to a superior coffee experience

WHAT'S NEXT?

Expanding consumption and the rise of on-trade channels will continue to benefit coffee

Affordable formats will remain a key driving force

Coffee as a functional beverage: energy, productivity, and lifestyle drivers

COMPETITIVE LANDSCAPE

GBO Mariposa Corp supports its instant coffee brands with its full logistical strengths

Minerva enjoys healthy fresh coffee growth thanks to offering balance of quality, authenticity, and affordability

CHANNELS

Tiendas de barrio remain key outlets for coffee sales

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[Tea in Ecuador](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sales of tea rebound back into low positive growth in both value and volume terms

INDUSTRY PERFORMANCE

Tea benefits from affordability and steady consumption — particularly with the return of cooler temperatures

Fruit/herbal tea benefits from local traditions and functional formulations

WHAT'S NEXT?

Limited distribution and weak brand activity constrain growth

Storytelling — a key to boost sales over the forecast period

Ecuadorian biodiversity — a factor that can relate tea with health and wellness

COMPETITIVE LANDSCAPE

Pusuquí Grande & Anexos maintains lead with no real competition, due to low activity in tea

Private label Corporación Favorita benefits from ongoing product expansions

CHANNELS

Supermarkets channel maintains half of all distribution share, thanks to wide offer of brands, sizes, and promotions

Significant growth of discounters channel reflects in tea sales

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[Other Hot Drinks in Ecuador](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Other hot drinks remain in a volume slump due to high prices of cocoa

INDUSTRY PERFORMANCE

The key performance driver is the significance of chocolate-based flavoured powder drinks

Producers seek to expand the uses of cocoa

WHAT'S NEXT?

Relatively flat sales for other hot drinks, with some support from on-trade and the rise of specialty chocolateries

Innovation to drive growth in Ecuador's other hot drinks

Sugar content — a key issue for health and wellness trends

COMPETITIVE LANDSCAPE

Universal Sweet Industries maintains lead thanks to strong position of its flagship La Universal Cocoa

Choco Listo brand benefits from ease of preparation, strong marketing, and wide availability

CHANNELS

Supermarkets maintains distribution channel lead

Significant growth of discounters channel reflects in other hot drinks sales

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