



Carbonates in Ecuador

December 2025

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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

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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

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