



Euromonitor
International

Concentrates in Colombia

December 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Market dynamics shaped by economic pressures and shifting consumption habits

INDUSTRY PERFORMANCE

Retail volume declines as purchasing priorities continue to shift

Powder concentrates remained the most dynamic category within concentrates in 2025, despite declining volume.

WHAT'S NEXT?

Retail volume sales of concentrates are expected to fall over the forecast period

Flavour-led innovation expected to dominate, while added-value opportunities remain limited

Adjacent powder formats gain relevance as sports nutrition grows in specialised channels

COMPETITIVE LANDSCAPE

Quala builds category leadership through flavour innovation and widespread distribution

Quala remains the most dynamic company in a declining category

CHANNELS

Traditional grocers remain the strongest channel despite growing competitive pressures

Discounters show limited interest in private label concentrates as category appeal wanes

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EXECUTIVE SUMMARY

Economic volatility, regulatory pressures, and changing consumer needs redefine soft drinks demand in 2025

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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

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