



Coffee in Ecuador

December 2025

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Coffee in Ecuador - Category analysis

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

Significant growth of discounters channel reflects in coffee sales

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Hot Drinks in Ecuador - Industry Overview

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

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