



Euromonitor
International

Bottled Water in Ecuador

December 2025

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Bottled Water in Ecuador - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sales of bottled water struggle to stay afloat due to lower demand

INDUSTRY PERFORMANCE

Bottled water faces sales pressure due to economic challenges and weather fluctuations

Carbonated bottled water sees some resilience due to a more premium perception

WHAT'S NEXT?

Bottled water will return to positive volume growth, thanks to aligning with health and wellness trends

Portfolio expansions and flavour innovations will help to support growth in bottled water

Health and sustainability trends: a double-edged sword for bottled water

COMPETITIVE LANDSCAPE

Tesalia Springs Co dominates carbonated bottled water with Guitig, supporting its leading place

Collective "others" perform well, while Coca-Cola's Dasani benefits from strong investment

CHANNELS

Small local grocers remain key for impulse consumption

Discounters channel sees strongest growth from a low base

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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

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