



# Concentrates in Ecuador

December 2025

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## Concentrates in Ecuador - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Stable yet flat growth for concentrates, reflecting low baseline demand

#### INDUSTRY PERFORMANCE

Low volume growth supported by somewhat flat baseline demand

Iced tea concentrates continue to increase in popularity

#### WHAT'S NEXT?

Ongoing flat growth driven by advertising and affordability

Flavour innovation will remain key in new product developments

Health and wellness trends pose both challenges and opportunities in concentrates

#### COMPETITIVE LANDSCAPE

Quala maintains its strong lead as the main player in concentrates

Sumesa returns to strength after a period of financial and administrative challenges

#### CHANNELS

Small local grocers remains the key distribution channel for concentrates

Discounters channel sees strongest growth from a low base

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### 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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