



Concentrates in Bolivia

December 2025

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Concentrates in Bolivia - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Concentrates struggles to maintain relevance amid rise of RTD options

INDUSTRY PERFORMANCE

Concentrates faces growing competition from more convenient alternatives

Powder concentrates dominates sales

WHAT'S NEXT?

Players will seek to balance affordability with premium innovation

E-commerce and direct selling will redefine concentrates distribution

Emerging health and labelling trends could facilitate shift towards cleaner formulations

COMPETITIVE LANDSCAPE

Industrias Venado dominates sales

Smaller brands drive growth with premium, health-focused innovations

CHANNELS

Traditional trade remains integrated in daily routines

Direct selling shows greatest resilience

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Affordability remains key driver of growth

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INDUSTRY PERFORMANCE

Climatic factors underpin steady consumption amid growing diversification

Affordability remains key consideration

Health-focused offerings gain traction

WHAT'S NEXT?

Shifting consumer lifestyles and infrastructure investments will support future growth

Health and wellness trend to drive innovation

Growing focus on local production

COMPETITIVE LANDSCAPE

EMBOL maintains leadership through extensive reach, innovation and digital investment

DICOM Distribuidores del Oriente benefits from growing success of Aloe Vera Tai, while PepsiCo expands sales through innovation and widening distribution

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E-commerce sees rapid expansion from low base

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