



# Concentrates in Costa Rica

December 2025

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## Concentrates in Costa Rica - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Minimal volume growth, as consumers favour RTD offerings

#### INDUSTRY PERFORMANCE

Limited volume growth in 2025

Liquid concentrates registers higher volume growth

#### WHAT'S NEXT?

Minimal volume growth over forecast period

Private label to gain ground

Health and wellness influences further dampen volume sales

#### COMPETITIVE LANDSCAPE

Mondelez holds on to commanding lead

Private label gains most volume share

#### CHANNELS

Small local grocers lead distribution of liquid concentrates

Supermarkets lead distribution of powder concentrates

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Lower tourist numbers dampen volume sales

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#### INDUSTRY PERFORMANCE

Zero volume growth in 2025

Health and wellness claims enter the mainstream

Marketing strategies continue to evolve

## WHAT'S NEXT?

Steady volume growth over forecast period

Two US companies continue to lead

Potential headwinds a concern

## COMPETITIVE LANDSCAPE

Florida Bebidas holds on to tight lead

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