



Soft Drinks in Bolivia

December 2025

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Soft Drinks in Bolivia

EXECUTIVE SUMMARY

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

CHANNELS

Small local grocers dominates sales

E-commerce sees rapid expansion from low base

Foodservice vs retail split

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[Bottled Water in Bolivia](#)

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2025 DEVELOPMENTS

Need for reliable hydration drives importance of bottled water

INDUSTRY PERFORMANCE

Bottled water continues to play essential role, even amid economic pressures

Still purified bottled water sees rapid growth

WHAT'S NEXT?

Local bottlers will drive future growth

Digitalisation will transform distribution models

Health and wellness will shape next phase of growth

COMPETITIVE LANDSCAPE

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[Carbonates in Bolivia](#)

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INDUSTRY PERFORMANCE

Carbonates sees continued growth, boosted by availability of affordable formats
Lemonade/lime leads growth

WHAT'S NEXT?

Sustained growth through climate impact, heritage and affordable choices
Digitalisation will drive retailer and consumer engagement
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[Concentrates in Bolivia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

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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

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Smaller brands drive growth with premium, health-focused innovations

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[Juice in Bolivia](#)

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Packaging strategies and local flavours sustain demand

INDUSTRY PERFORMANCE

Multi-tiered packaging strategy ensures continued relevance of juice drinks
Nectars leads growth through innovation and affordability

WHAT'S NEXT?

Wide availability of affordable formats will ensure juice remains resilient
Local fruits will redefine juice landscape
Health-conscious consumers will drive sales of wellness-positioned products

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RTD Tea in Bolivia

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2025 DEVELOPMENTS

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INDUSTRY PERFORMANCE

RTD tea contracts as consumers prioritise basic necessities
Regular still varieties dominate sales

WHAT'S NEXT?

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Pil Andina's extensive distribution network will anchor sales
Health and wellness positioning will help RTD tea to sustain its relevance

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[Energy Drinks in Bolivia](#)

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Local innovation and stable prices fuel growth

Reduced sugar energy drinks have growing, niche presence while regular formulations dominate sales

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Local offerings will power consumption

EMBOL to drive future growth through digitalisation strategy

Players to pursue health-focused innovation

COMPETITIVE LANDSCAPE

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[Sports Drinks in Bolivia](#)

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INDUSTRY PERFORMANCE

Sports drinks continues to expand through stable pricing and functional positioning

Regular sports drinks remains key growth driver

WHAT'S NEXT?

Local players to drive steady growth as imports decline

EMBOL to drive growth through investment in e-commerce

Sports drinks will become more mainstream and hydration-focused

COMPETITIVE LANDSCAPE

EMBOL's Powerade anchors sales

Suerox sets new precedent for multifunctional hydration products

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