



Euromonitor
International

Bottled Water in Colombia

December 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Bottled water declines after the 2024 heatwave surge, while flavoured water continues to outperform

INDUSTRY PERFORMANCE

Retail volume sales of bottled water decreased in 2025
Flavoured bottled water benefits from health-driven indulgence and category diversification

WHAT'S NEXT?

Retail volume sales of bottled water are expected to recover and grow over the forecast period
Digital commerce strengthens Postobón's reach and price competitiveness
Functional hydration expands as consumers seek added benefits beyond basic water

COMPETITIVE LANDSCAPE

Postobón consolidates leadership through high penetration and kid-focused flavour innovation
Private label gains momentum through competitive pricing and flavour variety

CHANNELS

Traditional trade remains dominant but continues to lose share as consumers migrate to value-focused channels
Discounters lead growth as expansion and low prices attract both brands and consumers

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EXECUTIVE SUMMARY

Economic volatility, regulatory pressures, and changing consumer needs redefine soft drinks demand in 2025

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Functional and fortified beverages strengthen their position
Health consciousness boosts reduced-sugar products and clean label innovation
Price sensitivity and migration toward discounters and modern retail

WHAT'S NEXT?

Volume recovery expected, though category performance will diverge
Health and functionality will shape innovation pipelines

Digital strategies, influencer collaborations, and direct-to-consumer models gain traction
Event sponsorship and experiential marketing remain priority investments

COMPETITIVE LANDSCAPE

Postobón maintains strong leadership through diversification and distribution
RTD coffee growth led by Procafecol and rising challenger brands
Quala expands across multiple categories with strong, price-competitive brands

CHANNELS

Small local grocers remain key but continue to lose share
Health and beauty specialists emerge as the fastest-growing channel
E-commerce expands gradually with rising promotional sophistication

FOODSERVICE VS RETAIL SPLIT

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