



# Soft Drinks in Ecuador

December 2025

Table of Contents

## Soft Drinks in Ecuador

### 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

Discounters sees robust channel growth, thanks to expansion of Las Tiendas Tuti

Foodservice vs retail split

#### MARKET DATA

Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 15 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 16 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 17 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 18 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 19 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 20 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 21 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 22 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 23 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 24 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 25 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030

Table 26 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 27 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030

Table 28 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030

Table 29 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030

Table 30 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

Table 31 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

Table 32 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

### SOURCES

Summary 1 - Research Sources

Bottled Water in Ecuador

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Sales of bottled water struggle to stay afloat due to lower demand

#### INDUSTRY PERFORMANCE

Bottled water faces sales pressure due to economic challenges and weather fluctuations

Carbonated bottled water sees some resilience due to a more premium perception

#### WHAT'S NEXT?

Bottled water will return to positive volume growth, thanks to aligning with health and wellness trends

Portfolio expansions and flavour innovations will help to support growth in bottled water

Health and sustainability trends: a double-edged sword for bottled water

#### COMPETITIVE LANDSCAPE

Tesalia Springs Co dominates carbonated bottled water with Guitig, supporting its leading place

Collective "others" perform well, while Coca-Cola's Dasani benefits from strong investment

#### CHANNELS

Small local grocers remain key for impulse consumption

Discounters channel sees strongest growth from a low base

#### CATEGORY DATA

Table 33 - Off-trade Sales of Bottled Water by Category: Volume 2020-2025

Table 34 - Off-trade Sales of Bottled Water by Category: Value 2020-2025

Table 35 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2020-2025

Table 36 - Off-trade Sales of Bottled Water by Category: % Value Growth 2020-2025

Table 37 - NBO Company Shares of Off-trade Bottled Water: % Volume 2021-2025

Table 38 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2022-2025

Table 39 - NBO Company Shares of Off-trade Bottled Water: % Value 2021-2025

Table 40 - LBN Brand Shares of Off-trade Bottled Water: % Value 2022-2025

Table 41 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2025-2030

Table 42 - Forecast Off-trade Sales of Bottled Water by Category: Value 2025-2030

Table 43 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2025-2030

Table 44 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

Carbonates in Ecuador

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

A negative performance for carbonates in Ecuador, caused by several reasons

## INDUSTRY PERFORMANCE

Weather, political uncertainty, and retail challenges impact performance

Reduced sugar options are generally preferred, while regular tonic water benefit from demand for mixers

## WHAT'S NEXT?

Flat growth expected due to category maturity and channel shifts

Marketing as a key differentiator in a saturated carbonates market

Health and wellness as a structural challenge for carbonates

## COMPETITIVE LANDSCAPE

Coca-Cola maintains strong lead thanks to well-known brand portfolio and distribution reach of Arca Continental

Tesalia Spring benefits from Pepsi's more affordable price compared to Coca-Cola

## CHANNELS

Small local grocers remains the most relevant channel, thanks to capacity for chilled goods inspiring impulse purchases

Discounters channel sees strongest growth from a low base

## CATEGORY DATA

Table 45 - Off-trade vs On-trade Sales of Carbonates: Volume 2020-2025

Table 46 - Off-trade vs On-trade Sales of Carbonates: Value 2020-2025

Table 47 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2020-2025

Table 48 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2020-2025

Table 49 - Off-trade Sales of Carbonates by Category: Volume 2020-2025

Table 50 - Off-trade Sales of Carbonates by Category: Value 2020-2025

Table 51 - Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025

Table 52 - Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025

Table 53 - Sales of Carbonates by Total Fountain On-trade: Volume 2020-2025

Table 54 - Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2020-2025

Table 55 - NBO Company Shares of Off-trade Carbonates: % Volume 2021-2025

Table 56 - LBN Brand Shares of Off-trade Carbonates: % Volume 2022-2025

Table 57 - NBO Company Shares of Off-trade Carbonates: % Value 2021-2025

Table 58 - LBN Brand Shares of Off-trade Carbonates: % Value 2022-2025

Table 59 - Forecast Off-trade Sales of Carbonates by Category: Volume 2025-2030

Table 60 - Forecast Off-trade Sales of Carbonates by Category: Value 2025-2030

Table 61 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2025-2030

Table 62 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2025-2030

Table 63 - Forecast Sales of Carbonates by Total Fountain On-trade: Volume 2025-2030

Table 64 - Forecast Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

Concentrates in Ecuador

## 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  
Concentrates Conversions  
Summary 2 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

## CATEGORY DATA

Table 65 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025  
Table 66 - Off-trade Sales of Concentrates by Category: Value 2020-2025  
Table 67 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2020-2025  
Table 68 - Off-trade Sales of Concentrates by Category: % Value Growth 2020-2025  
Table 69 - NBO Company Shares of Off-trade Concentrates (RTD): % Volume 2021-2025  
Table 70 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2022-2025  
Table 71 - NBO Company Shares of Off-trade Concentrates: % Value 2021-2025  
Table 72 - LBN Brand Shares of Off-trade Concentrates: % Value 2022-2025  
Table 73 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2025  
Table 74 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2022-2025  
Table 75 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2025  
Table 76 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2022-2025  
Table 77 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2025-2030  
Table 78 - Forecast Off-trade Sales of Concentrates by Category: Value 2025-2030  
Table 79 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2025-2030  
Table 80 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

[Juice in Ecuador](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Juice faces challenges from high sugar content and high prices

### INDUSTRY PERFORMANCE

Juice drinks see small positive volume growth thanks to affordability compared to other juice options  
Coconut and other plant waters benefit from aligning with health and wellness trends

### WHAT'S NEXT?

Moderate growth ahead for juice, with maturity in core categories and opportunities for rising preferences  
Functional positioning to drive growth in coconut water and 100% juice  
Health and wellness trends weigh on nectars as sugar becomes a red flag

## COMPETITIVE LANDSCAPE

Ajcuador SA leads juice with an affordable portfolio and wide distribution  
Combined "others" see the strongest growth, thanks to rising popularity of private label

## CHANNELS

Small local grocers drive juice sales while modern channels offer premium options  
Discounters channel sees strongest growth from a low base

## CATEGORY DATA

Table 81 - Off-trade Sales of Juice by Category: Volume 2020-2025  
Table 82 - Off-trade Sales of Juice by Category: Value 2020-2025  
Table 83 - Off-trade Sales of Juice by Category: % Volume Growth 2020-2025  
Table 84 - Off-trade Sales of Juice by Category: % Value Growth 2020-2025  
Table 85 - NBO Company Shares of Off-trade Juice: % Volume 2021-2025  
Table 86 - LBN Brand Shares of Off-trade Juice: % Volume 2022-2025  
Table 87 - NBO Company Shares of Off-trade Juice: % Value 2021-2025  
Table 88 - LBN Brand Shares of Off-trade Juice: % Value 2022-2025  
Table 89 - Forecast Off-trade Sales of Juice by Category: Volume 2025-2030  
Table 90 - Forecast Off-trade Sales of Juice by Category: Value 2025-2030  
Table 91 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2025-2030  
Table 92 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

RTD Tea in Ecuador

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Healthy growth for RTD tea, thanks to rising popularity of these products

### INDUSTRY PERFORMANCE

RTD tea continues to expand as a refreshing and accessible alternative beverage  
Still RTD tea is the main product in the category, although opportunities remain for kombucha

### WHAT'S NEXT?

RTD tea shows low maturity and ongoing growth potential  
Lack of innovation suppresses stronger growth in RTD tea  
Health and lifestyle positioning strategies will support sales

### COMPETITIVE LANDSCAPE

Fuze Tea drives overall category growth through strong distribution and wellness positioning  
Small players and private label slowly carve out space

### CHANNELS

Small local grocers remains the main distribution channel for RTD tea  
Forecourt retailers see strongest growth, thanks to ongoing upgrades

## CATEGORY DATA

Table 93 - Off-trade Sales of RTD Tea by Category: Volume 2020-2025  
Table 94 - Off-trade Sales of RTD Tea by Category: Value 2020-2025  
Table 95 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2020-2025  
Table 96 - Off-trade Sales of RTD Tea by Category: % Value Growth 2020-2025  
Table 97 - NBO Company Shares of Off-trade RTD Tea: % Volume 2021-2025  
Table 98 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2022-2025  
Table 99 - NBO Company Shares of Off-trade RTD Tea: % Value 2021-2025  
Table 100 - LBN Brand Shares of Off-trade RTD Tea: % Value 2022-2025  
Table 101 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2025-2030  
Table 102 - Forecast Off-trade Sales of RTD Tea by Category: Value 2025-2030

Table 103 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2025-2030

Table 104 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

[Energy Drinks in Ecuador](#)

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Healthy volume growth is stronger than value growth in energy drinks

#### INDUSTRY PERFORMANCE

Functional appeal drives growth of energy drinks, amid competitive pressures

Reduced sugar energy drinks see slightly stronger growth, albeit sugar is not a key concern in energy drinks

#### WHAT'S NEXT?

Ongoing growth driven by affordable options, while premium offerings will remain niche

Innovation, storytelling, and media investment will support growth

Functionality remains the key driver for energy drinks sales

#### COMPETITIVE LANDSCAPE

Tesalia Spring Co maintains lead thanks to popularity and wide distribution of its V220 brand

Coca-Cola's Fury supports robust growth for the player

#### CHANNELS

Small local grocers remains the key distribution channel

Discounters channel sees strongest growth from a low base

#### CATEGORY DATA

Table 105 - Off-trade Sales of Energy Drinks: Volume 2020-2025

Table 106 - Off-trade Sales of Energy Drinks: Value 2020-2025

Table 107 - Off-trade Sales of Energy Drinks: % Volume Growth 2020-2025

Table 108 - Off-trade Sales of Energy Drinks: % Value Growth 2020-2025

Table 109 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2021-2025

Table 110 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2022-2025

Table 111 - NBO Company Shares of Off-trade Energy Drinks: % Value 2021-2025

Table 112 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2022-2025

Table 113 - Forecast Off-trade Sales of Energy Drinks: Volume 2025-2030

Table 114 - Forecast Off-trade Sales of Energy Drinks: Value 2025-2030

Table 115 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2025-2030

Table 116 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

[Sports Drinks in Ecuador](#)

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Sports drinks suffer from lower consumer spending power and lack of demand due to poor weather conditions

#### INDUSTRY PERFORMANCE

Divergent trends seen in sports drinks, with oral rehydration solutions attracting attention

Regular sports drinks dominate over reduced sugar options, with brand awareness key to sales

## WHAT'S NEXT?

Growth and opportunities remain for sports drinks, despite affordability pressures  
Expanding beyond modern trade will be a key strategy to growth  
Health and wellness trends drive hydration but challenge sugar-rich sports drinks

## COMPETITIVE LANDSCAPE

Ajcuador SA Leads Sports Drinks with a variety of presentations  
Genommalab benefits from the ORS positioning of Suerox

## CHANNELS

Small local grocers remain the leading distribution channel for sports drinks  
Discounters channel sees strongest growth from a low base

## CATEGORY DATA

Table 117 - Off-trade Sales of Sports Drinks: Volume 2020-2025  
Table 118 - Off-trade Sales of Sports Drinks: Value 2020-2025  
Table 119 - Off-trade Sales of Sports Drinks: % Volume Growth 2020-2025  
Table 120 - Off-trade Sales of Sports Drinks: % Value Growth 2020-2025  
Table 121 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2021-2025  
Table 122 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2022-2025  
Table 123 - NBO Company Shares of Off-trade Sports Drinks: % Value 2021-2025  
Table 124 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2022-2025  
Table 125 - Forecast Off-trade Sales of Sports Drinks: Volume 2025-2030  
Table 126 - Forecast Off-trade Sales of Sports Drinks: Value 2025-2030  
Table 127 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2025-2030  
Table 128 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

### About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/soft-drinks-in-ecuador/report](http://www.euromonitor.com/soft-drinks-in-ecuador/report).