



Juice in Colombia

December 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Juice demand declines as consumers favour healthier and more affordable alternatives

INDUSTRY PERFORMANCE

Retail volume sales of juice continued to decline in 2025

100% juice grows as consumers seek clean labels and value through private label

WHAT'S NEXT?

Retail volume sales of juice are expected to see slight decline over the forecast period

Digital transformation accelerates Postobón's omnichannel presence

Functional juices for adults remain niche but poised for long-term opportunity

COMPETITIVE LANDSCAPE

Postobón maintains leadership despite reformulation challenges and share loss

Pepsi-Cola strengthens its presence through partnerships as Country Hill exits the category

CHANNELS

Traditional trade remains dominant but loses share as consumers seek better value

Discounters lead growth with expanding coverage and strong private label

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[Soft Drinks in Colombia - Industry Overview](#)

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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