



RTD Coffee in Colombia

December 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Early-stage category expands through local innovation and digital engagement

INDUSTRY PERFORMANCE

Strong double-digit gains powered by local brands and new consumption occasions
Concentrated cold brew and flavoured lattes were the most dynamic formats in 2025

WHAT'S NEXT?

Rapid growth ahead supported by innovation, new occasions and functional positioning
Innovation in concentrated and versatile formats will unlock broader use occasions
Functional and natural ingredient trends will shape future RTD coffee innovation

COMPETITIVE LANDSCAPE

Juan Valdez strengthens leadership as premium local brands expand
Veda Drinks drives premium growth with Samsara, though limited by high price points

CHANNELS

Modern retail leads while traditional trade and discounters remain underdeveloped
Shelf expansion and category education support growth in modern retail

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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

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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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