Soft Drinks in Honduras

March 2026

Table of Contents

Soft Drinks in Honduras

EXECUTIVE SUMMARY

Modest growth of soft drinks sales as disposable incomes remain constrained

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Functional beverages and growing health awareness drive growth of premium brands

Channel fragmentation requires retail agility

Innovation has become faster, riskier, and more culturally embedded

WHAT'S NEXT?

Climate change benefits categories that provide the most refreshment including bottled water and carbonates

Sustained forecast period growth of sports drinks while juice sales leverage on health attributes

Better-for-you variants grow in popularity and availability across more soft drinks categories

COMPETITIVE LANDSCAPE

Cervecería Hondureña SA de CV retains its outright lead thanks to the global renown of the Coca-Cola brand

Embotelladora La Reyna SA achieves the strongest growth

CHANNELS

Small local grocers retains its outright lead though modern grocers increase their position in the distribution of soft drinks in the country

Convenience stores grow from a low base

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

Table 14 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 15 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 16 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 17 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 18 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 19 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 20 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 21 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 22 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 23 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030

Table 24 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 25 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030

Table 26 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030

Table 27 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030

Table 28 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

CARBONATES

key data findings
2025 Developments
Slow growth of carbonates in 2025 given high levels of saturation in Honduras
industry performance
Carbonates are consumed by most of the population regardless of age or socioeconomic status
Price-sensitive consumers seek out products on promotion
WHAT’s NEXT?
Consumers make healthier choices as the health and wellness trend gathers momentum over the forecast period
Industry players increasingly promote their sustainability initiatives in the production of carbonates
Non-cola carbonates faces a number of challenges over the forecast period
COMPETITIVE LANDSCAPE
Cervecería Hondureña SA de CV retains its outright lead in carbonates thanks to the global renown of the Coca-Cola brand
Embotelladora de Sula SA records the fastest growth in 2025 with the Pepsi brand
CHANNELS
Small local grocers retains a strong lead in the distribution of carbonates
The niche retail e-commerce channel registers the fastest growth but poses no threat to small local grocers
Category Data
Table 29 - Off-trade vs On-trade Sales of Carbonates: Volume 2020-2025
Table 30 - Off-trade vs On-trade Sales of Carbonates: Value 2020-2025
Table 31 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2020-2025
Table 32 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2020-2025
Table 33 - Off-trade Sales of Carbonates by Category: Volume 2020-2025
Table 34 - Off-trade Sales of Carbonates by Category: Value 2020-2025
Table 35 - Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025
Table 36 - Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025
Table 37 - NBO Company Shares of Off-trade Carbonates: % Volume 2021-2025
Table 38 - LBN Brand Shares of Off-trade Carbonates: % Volume 2022-2025
Table 39 - NBO Company Shares of Off-trade Carbonates: % Value 2021-2025
Table 40 - LBN Brand Shares of Off-trade Carbonates: % Value 2022-2025
Table 41 - Forecast Off-trade Sales of Carbonates by Category: Volume 2025-2030
Table 42 - Forecast Off-trade Sales of Carbonates by Category: Value 2025-2030
Table 43 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2025-2030
Table 44 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2025-2030

JUICE

key data findings
2025 Developments
Ongoing sales growth of juice in 2025
industry performance
Budget constraints lead to a trading down in juice
Polarisation of brands around price, pack sizes and consumer base
what’s next?
Income limitations favour lower-priced options, though juice for a niche audience and nectars still have potential
Growing health and wellness trend favours juice but not for brands with a high sugar content
Innovation plays a key role in juice
competitive landscape
Lácteos Hondureños, SA (Lacthosa) leads with the Sula brand
The leading players leverage on their strength in other packaged food categories to boost their share in juice
channels
Small local grocers retains an outright lead in the distribution of juice

Convenience stores and retail e-commerce register the fastest growth in 2025
Category Data
Table 45 - Off-trade Sales of Juice by Category: Volume 2020-2025
Table 46 - Off-trade Sales of Juice by Category: Value 2020-2025
Table 47 - Off-trade Sales of Juice by Category: % Volume Growth 2020-2025
Table 48 - Off-trade Sales of Juice by Category: % Value Growth 2020-2025
Table 49 - NBO Company Shares of Off-trade Juice: % Volume 2021-2025
Table 50 - LBN Brand Shares of Off-trade Juice: % Volume 2022-2025
Table 51 - NBO Company Shares of Off-trade Juice: % Value 2021-2025
Table 52 - LBN Brand Shares of Off-trade Juice: % Value 2022-2025
Table 53 - Forecast Off-trade Sales of Juice by Category: Volume 2025-2030
Table 54 - Forecast Off-trade Sales of Juice by Category: Value 2025-2030
Table 55 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2025-2030
Table 56 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2025-2030

BOTTLED WATER
key data findings
2025 Developments
Bottled water remains popular in Honduras
industry performance
Failings in infrastructure boost demand for bottled water in the country
Large bottle sizes are popular among households able to afford bottled water
what's next?
Despite investments in improving the municipal supply, infrastructure challenges remain over the forecast period
Rising health awareness boosts demand for bottled water
Growing availability of flavoured water and sparkling water
competitive landscape
Embotelladora de Sula SA maintains its outright lead in bottled water with the Aguazul brand
Embotelladora de Sula SA enjoys the fastest growth
channels
Small local grocers retains the outright lead in the distribution of bottled water
Convenience stores and retail e-commerce achieve growth from a low base
Category Data
Table 57 - Off-trade Sales of Bottled Water by Category: Volume 2020-2025
Table 58 - Off-trade Sales of Bottled Water by Category: Value 2020-2025
Table 59 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2020-2025
Table 60 - Off-trade Sales of Bottled Water by Category: % Value Growth 2020-2025
Table 61 - NBO Company Shares of Off-trade Bottled Water: % Volume 2021-2025
Table 62 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2022-2025
Table 63 - NBO Company Shares of Off-trade Bottled Water: % Value 2021-2025
Table 64 - LBN Brand Shares of Off-trade Bottled Water: % Value 2022-2025
Table 65 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2025-2030
Table 66 - Forecast Off-trade Sales of Bottled Water by Category: Value 2025-2030
Table 67 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2025-2030
Table 68 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2025-2030

SPORTS DRINKS
key data findings
2025 Developments
Record high temperatures promotes consumption of sports drinks for their hydration qualities
industry performance
Sports drinks benefits from versatility in usage
Despite a widening of the consumer base, the category remains small

what’s next?
Ongoing sales growth of sports drinks from a low base
Better-for-you variants become increasingly available over the forecast period
New brands emerge and distribution widens
competitive landscape
Embotelladora La Reyna SA retains the outright lead with Gatorade
Genomma Lab Internacional achieves strong growth in 2025 with Suerox
channels
Small local grocers retains a strong lead in the distribution of sports drinks
The emerging channel for sports drinks, retail e-commerce, achieves strong growth
Category Data
Table 69 - Off-trade Sales of Sports Drinks: Volume 2020-2025
Table 70 - Off-trade Sales of Sports Drinks: Value 2020-2025
Table 71 - Off-trade Sales of Sports Drinks: % Volume Growth 2020-2025
Table 72 - Off-trade Sales of Sports Drinks: % Value Growth 2020-2025
Table 73 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2021-2025
Table 74 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2022-2025
Table 75 - NBO Company Shares of Off-trade Sports Drinks: % Value 2021-2025
Table 76 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2022-2025
Table 77 - Forecast Off-trade Sales of Sports Drinks: Volume 2025-2030
Table 78 - Forecast Off-trade Sales of Sports Drinks: Value 2025-2030
Table 79 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2025-2030
Table 80 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2025-2030

ENERGY DRINKS
key data findings
2025 Developments
Growing dynamism of energy drinks in Honduras
industry performance
Free from sugar options grow in popularity and availability
Returnability appeals to environmentally aware consumers and those seeking lower priced energy drinks
what’s next?
The Energy Drinks Control and Regulation Law bans the sale of energy drinks to minors under 18 years of age while health concerns may limit consumption
Positive prospects for premium energy drinks
Segmentation strategies are being increasingly deployed
competitive landscape
Embotelladora La Reyna SA retains a strong lead with a variety of brands
Cervecería Hondureña SA de CV achieves strong growth with Monster Energy
channels
Small local grocers leads in a fragmented distribution landscape for energy drinks
Growth across channels in 2025, led by the niche convenience stores channel
Category Data
Table 81 - Off-trade Sales of Energy Drinks: Volume 2020-2025
Table 82 - Off-trade Sales of Energy Drinks: Value 2020-2025
Table 83 - Off-trade Sales of Energy Drinks: % Volume Growth 2020-2025
Table 84 - Off-trade Sales of Energy Drinks: % Value Growth 2020-2025
Table 85 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2021-2025
Table 86 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2022-2025
Table 87 - NBO Company Shares of Off-trade Energy Drinks: % Value 2021-2025
Table 88 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2022-2025
Table 89 - Forecast Off-trade Sales of Energy Drinks: Volume 2025-2030

Table 90 - Forecast Off-trade Sales of Energy Drinks: Value 2025-2030
Table 91 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2025-2030
Table 92 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2025-2030

CONCENTRATES

key data findings
2025 Developments
Modest growth of concentrates sales as consumers eschew the category for more convenient soft drinks
industry performance
Powder concentrates endeavour to appeal to consumers through affordability, local flavours and health benefits
what’s next?
Industry players endeavour to stimulate interest in the category by promoting nutritional product attributes
Industry players extend the variety of flavours available and provide low cost packaging options
Concentrates suffers from the necessity to mix with water, especially given the poor quality of municipal water
competitive landscape
D'Casa SA maintains an outright lead with its Zuko brand
Mondelez Honduras S de RL achieves strong growth thanks to the growing popularity of its Tang brand
channels
Small local grocers remains by far the leading channel for concentrates
Strong growth of hypermarkets but from a low base
Category Data
Table 93 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025
Table 94 - Off-trade Sales of Concentrates by Category: Value 2020-2025
Table 95 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2020-2025
Table 96 - Off-trade Sales of Concentrates by Category: % Value Growth 2020-2025
Table 97 - NBO Company Shares of Off-trade Concentrates (RTD): % Volume 2021-2025
Table 98 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2022-2025
Table 99 - NBO Company Shares of Off-trade Concentrates: % Volume 2021-2025
Table 100 - LBN Brand Shares of Off-trade Concentrates: % Volume 2022-2025
Table 101 - NBO Company Shares of Off-trade Concentrates: % Value 2021-2025
Table 102 - LBN Brand Shares of Off-trade Concentrates: % Value 2022-2025
Table 103 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2025
Table 104 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2022-2025
Table 105 - NBO Company Shares of Off-trade Liquid Concentrates: % Volume 2021-2025
Table 106 - LBN Brand Shares of Off-trade Liquid Concentrates: % Volume 2022-2025
Table 107 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2025
Table 108 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2022-2025
Table 109 - NBO Company Shares of Off-trade Powder Concentrates: % Volume 2021-2025
Table 110 - LBN Brand Shares of Off-trade Powder Concentrates: % Volume 2022-2025
Table 111 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2025-2030
Table 112 - Forecast Off-trade Sales of Concentrates by Category: Value 2025-2030
Table 113 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2025-2030
Table 114 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2025-2030

RTD TEA

key data findings
2025 Developments
Sustained growth of RTD tea as the category resonates with Millennials and Generation Z
industry performance
Category dynamism stimulates launches of large packaging formats
Despite the high sugar content in RTD tea, the category appeals to consumers seeking to avoid carbonates
what’s next?
Forecast period sales of RTD tea boosted by functional offerings

Despite increased availability through a wider variety of retail channels and larger pack sizes, demand remains concentrated among key consumer groups
Industry players introduce further segmentation to widen the consumer base
competitive landscape
Unilever retains its outright lead with the globally renowned Lipton brand
The return to the original product formula and revamped packaging enable Lipton to achieve strong growth in 2025
channels
Small local grocers remains by far the leading channel
Strong growth of retail e-commerce from a low base
Category Data
Table 115 - Off-trade Sales of RTD Tea by Category: Volume 2020-2025
Table 116 - Off-trade Sales of RTD Tea by Category: Value 2020-2025
Table 117 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2020-2025
Table 118 - Off-trade Sales of RTD Tea by Category: % Value Growth 2020-2025
Table 119 - NBO Company Shares of Off-trade RTD Tea: % Volume 2021-2025
Table 120 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2022-2025
Table 121 - NBO Company Shares of Off-trade RTD Tea: % Value 2021-2025
Table 122 - LBN Brand Shares of Off-trade RTD Tea: % Value 2022-2025
Table 123 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2025-2030
Table 124 - Forecast Off-trade Sales of RTD Tea by Category: Value 2025-2030
Table 125 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2025-2030
Table 126 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2025-2030

RTD COFFEE

2025 Developments
RTD coffee sales dampened by high unit prices, the popularity of coffee and no history of consumption
industry performance
RTD coffee perceived as a low quality product
Espresso Americano’s RTD brand competes well with Starbucks in consumer foodservice in terms of taste and price
what’s next?
RTD coffee retains a niche status over the forecast period
Expansion of coffee shops dampens retail sales of RTD coffee
Niche offerings yet to make an appearance in Honduras
competitive landscape
Limited number of players in a category characterised by a lack of innovation
Espresso Americano is present with locally produced RTD coffee
channels
Limited availability of RTD coffee with only a handful of offerings seen in convenience stores, forecourt retailers and supermarkets
Supermarkets is the channel of choice for the producers of the new Espresso Americano RTD coffee
Category Data
Table 127 - Off-trade Sales of RTD Coffee: Volume 2020-2025
Table 128 - Off-trade Sales of RTD Coffee: Value 2020-2025
Table 129 - Off-trade Sales of RTD Coffee: % Volume Growth 2020-2025
Table 130 - Off-trade Sales of RTD Coffee: % Value Growth 2020-2025
Table 131 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2021-2025
Table 132 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2022-2025
Table 133 - NBO Company Shares of Off-trade RTD Coffee: % Value 2021-2025
Table 134 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2022-2025
Table 135 - Forecast Off-trade Sales of RTD Coffee: Volume 2025-2030
Table 136 - Forecast Off-trade Sales of RTD Coffee: Value 2025-2030
Table 137 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2025-2030
Table 138 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2025-2030

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-honduras/report.