



Euromonitor
International

Soft Drinks in El Salvador

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EXECUTIVE SUMMARY

Moderate growth of soft drinks in 2025 as demand is dampened by a high level of poverty

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Select demographic groups increasingly seek soft drinks with a functionality or multi-benefit positioning

Consumers seek to make savings through both large and small pack sizes

Innovation increasingly focuses on the launch of health and wellness benefits

WHAT'S NEXT?

Steady, if moderate, growth of soft drinks over the forecast period

Climate factors stimulate demand for soft drinks while manufacturers endeavour to reduce their carbon footprint

Consumers demand more from soft drinks in the form of functionality

COMPETITIVE LANDSCAPE

The Coca-Cola Co, distributed by La Constancia SA, retains the outright lead in soft drinks

Laboratorios Pisa SA de CV with its Electrolit brand enjoys strong growth

CHANNELS

Small local grocers leads thanks to the ubiquitous nature of this channel

Hypermarkets achieves strong growth through the development of private label

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COUNTRY REPORTS DISCLAIMER

CARBONATES

Key Data Findings

2025 Developments

Carbonates sales continue to show positive growth despite increasing pressure from lighter, more effective hydration options

Industry Performance

Non-cola carbonates widen in range and appeal to younger people seeking new flavour profiles

Tonic waters/mixers/other bitters develops from a low base

What's Next?

Conservative forecast period growth of carbonates as the category becomes less appealing to young generations seeking to meet more specific hydration needs

Carbonates evolves towards a repositioning with functional health attributes

Sustainability is driven by global brands and resonates with young consumers, while players have to balance affordability

Competitive Landscape

Industry players embrace strategies of affordability and expansion of format sizes in a challenging economic environment

Embotelladora La Cascada SA de CV benefits from its lower priced brands

Channels

Greater citizen security drives expansion of small local grocers

Improved citizen security encourages greater activity outside the home and encourages consumption of soft drinks in the on-trade

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Key Data Findings

2025 Developments

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Industry Performance

Coconut and plant waters develop from a low base for their concrete healthful properties

Growth in single serve formats thanks to their appeal among children

What's Next?

Generational consumption preferences and demographic changes affect juice demand

Juice innovations aim to include more specific functionalities

Juice continues to highlight natural origin as a demand driver, but with a twist of energy or electrolyte contributions

Competitive Landscape

Brands are actively expanding packaging sizes to meet diverse consumption occasions and purchasing capacities

Distribuidora Sula SA experiences strong growth with its Sula brand

Channels

Small local grocers gains momentum through outlet expansion

Small local grocers achieves strong growth thanks to greater citizen security in the country

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BOTTLED WATER

Key Data Findings

2025 Developments

Bottled water remains highly relevant in El Salvador amid deficient drinking water supply infrastructure

Industry Performance

Weather conditions promote sales of bottled water and with brands claiming “hydration” and “natural origin” being the most popular

Bottled water remains popular and most widely available in urban areas

What's Next?

Demand for bottled water records positive forecast period growth as consumers prioritise hydration and low sugar consumption

Microplastics, while not yet a problem for most consumers, are expected to become increasingly concerning as consumer awareness grows

Functional bottled water markets “hydration effectiveness” claim to attract consumers

Competitive Landscape

Cristal maintains the lead thanks to its broad distribution network but is seeing greater competition from value brands

Inversiones Vida SA de CV gains momentum thanks to the growing popularity of its Alpina brand

Channels

Small local grocers strengthens in coverage and in widening its range of affordable formats

Improving public security situation in the country boosts sales of bottled water via small local grocers

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SPORTS DRINKS

Key Data Findings

2025 Developments

Sports drinks continue to appeal to a mass audience, moving away from a sole positioning towards athletes

Industry Performance

Sports drinks continues its expansion and appeals to a wider audience

Despite expansion, the category remains small

What's Next?

Increasingly active lifestyles and more intense weather conditions favour the development of sports activities

Sports drinks go beyond hydration, evolving towards the benefits of nutritional supplementation

Clean-label offerings and the use of natural, organic ingredients make an entrance over the forecast period

Competitive Landscape

PepsiCo Inc retains a strong lead with Gatorade

Electrolit strengthens its position with growth in distribution and the message of the effectiveness of its scientifically backed formulation

Channels

Supermarkets retains its strong lead in the distribution of sports drinks

Sports drink distribution strengthens through small local grocers with the products reaching new demographics

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ENERGY DRINKS

Key Data Findings

2025 Developments

Perception of lower levels of hydration and the growing negative association with health dampen demand for energy drinks

Industry Performance

Despite the increasing availability of low-priced options, premium brands continue to expand

Growing health consciousness popularises low sugar energy drinks and the avoidance of mixing with alcoholic beverages

What's Next?

Functionality remains the main driver of demand for energy drinks in El Salvador

Multi-benefit claims blur the line between energisers, sports drinks and functional waters

The inclusion of traditional local herbal compounds in energy drinks increases

Competitive Landscape

AMP remains among the leaders in energy drinks but faces increasing pressure from value brands in a highly price-sensitive market

Monster records strong growth thanks to its wide availability and variety of flavours

Channels

Supermarkets remains the most important channel for the distribution of energy drinks

Small local grocers expands in reach and benefits from impulse purchases of affordable brands

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CONCENTRATES

Key Data Findings

2025 Developments

Concentrates stagnates for reasons of practicality and greater pressure from soft drinks that are ready to drink and affordable

Industry Performance

Concentrates struggles to stay relevant amidst growing competition from other categories of soft drinks

Poverty boosts small pack sizes while the category suffers from an unhealthy image and a shrinking child population

What's Next?

Concentrates faces the challenge of connecting with young generations

Functional powder concentrates develop over the forecast period in El Salvador

The use of locally sourced organic ingredients in concentrates aligns with health and wellness trends

Competitive Landscape

Concentrates aims for affordability but also seeks to appeal to local taste preferences

Grupo Nutresa SA gains strong momentum with its Zuko brand

Channels

Supermarkets leads due to its wide offer of both powder and liquid concentrates while the channel also has appropriate cold storage

Small local grocers experiences expansion as citizen security continues to improve

Summary 1 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

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RTD TEA

Key Data Findings

2025 Developments

RTD tea connects positively with Salvadorans offering a balance between indulgence and thirst-quenching effectiveness

Industry Performance

RTD tea remains a small category and appeals to middle income earners and younger generations

Healthier perception, wide distribution and confidence in leading brands characterise RTD tea

What's Next?

Salvadorans seek beverage alternatives that offer lighter tastes without sacrificing indulgence

The impact of weather on commodity prices potentially hampers the performance of RTD tea

Health benefit features in RTD tea evolve in response to more personalised preferences

Competitive Landscape

Lipton consolidates its leadership in RTD tea with a wide range of formats and continued flavour innovation

Lipton registers strong growth in 2025 and consolidates its leadership

Channels

Small local grocers expands its coverage and capitalises on impulse purchases

Small local grocers benefits from improvements in citizen security

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