



Processed Fruit and Vegetables in Colombia

November 2025

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Processed Fruit and Vegetables in Colombia - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Healthy growth for processed fruit and vegetables

INDUSTRY PERFORMANCE

Popularity of frozen processed potatoes supports overall sales

Shelf staple beans gain traction, despite high prices

WHAT'S NEXT?

Baseline demand will continue to support sales, with diversified offers from private label expected

Volume sales challenged as consumers look for fresher and healthier options

Climate change challenges may present opportunities for shelf stable options to fill in

COMPETITIVE LANDSCAPE

Congelagro McCain Colombia benefits from strong success in frozen processed potatoes

Private label sees the strongest overall company growth thanks to expanding offer of affordable quality

CHANNELS

Supermarkets remains the strongest distribution channel, thanks to scale and infrastructure

Retail e-commerce benefits from omnichannel shopping trends

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Staple Foods in Colombia - Industry Overview

EXECUTIVE SUMMARY

Positive sales in both value and volume, supported by home cooking trends

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Home meal preparation and budget-friendly options drive sales

Growing focus on quality, despite ongoing price sensitivity

Evolving lifestyles and global cultural influences reshape consumer preferences

WHAT'S NEXT?

Ongoing positive sales, supported by polarised trends of premiumisation and affordability

Ongoing health and wellness trends focus on nutritional options — even at higher prices

Expansion of convenience stores in line with urbanisation

COMPETITIVE LANDSCAPE

Zenú, Bimbo, and Diana all in close brand competition, with combined private label holding the largest share
Nutrimenti de Colombia benefits from broad portfolio penetration, while Option meets modern demands

CHANNELS

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