



Euromonitor
International

Staple Foods in Colombia

November 2025

Table of Contents

Staple Foods in Colombia

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

Small local grocers remain a cornerstone in distribution, but are facing rising competition from modern outlets

Convenience stores rise as a key distribution channel for busy urban consumers

MARKET DATA

Table 1 - Sales of Staple Foods by Category: Volume 2020-2025

Table 2 - Sales of Staple Foods by Category: Value 2020-2025

Table 3 - Sales of Staple Foods by Category: % Volume Growth 2020-2025

Table 4 - Sales of Staple Foods by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Staple Foods: % Value 2021-2025

Table 6 - LBN Brand Shares of Staple Foods: % Value 2022-2025

Table 7 - Penetration of Private Label by Category: % Value 2020-2025

Table 8 - Distribution of Staple Foods by Format: % Value 2020-2025

Table 9 - Forecast Sales of Staple Foods by Category: Volume 2025-2030

Table 10 - Forecast Sales of Staple Foods by Category: Value 2025-2030

Table 11 - Forecast Sales of Staple Foods by Category: % Volume Growth 2025-2030

Table 12 - Forecast Sales of Staple Foods by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baked Goods in Colombia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sales of baked goods return to stronger growth

INDUSTRY PERFORMANCE

Bread remains a mainstay in local cuisine, although bakeries are facing some challenges

Packaged flat bread benefits from sales in discounters and new formulations

WHAT'S NEXT?

Collaborations and flavour innovation to drive growth in baked goods

Gluten-free claims are set to grow in importance

"Fresh from the oven" options will rise in convenience stores

COMPETITIVE LANDSCAPE

Bimbo expands bread portfolio from tradition to functionality

Corona brand demonstrates how value growth can be inflated by high prices, while volume contradicts the performance

CHANNELS

Food/drink/tobacco specialists remains the leading channel for baked goods

Convenience stores strengthen role in baked goods

CATEGORY DATA

Table 13 - Sales of Baked Goods by Category: Volume 2020-2025

Table 14 - Sales of Baked Goods by Category: Value 2020-2025

Table 15 - Sales of Baked Goods by Category: % Volume Growth 2020-2025

Table 16 - Sales of Baked Goods by Category: % Value Growth 2020-2025

Table 17 - Sales of Pastries by Type: % Value 2020-2025

Table 18 - NBO Company Shares of Baked Goods: % Value 2021-2025

Table 19 - LBN Brand Shares of Baked Goods: % Value 2022-2025

Table 20 - Distribution of Baked Goods by Format: % Value 2020-2025

Table 21 - Forecast Sales of Baked Goods by Category: Volume 2025-2030

Table 22 - Forecast Sales of Baked Goods by Category: Value 2025-2030

Table 23 - Forecast Sales of Baked Goods by Category: % Volume Growth 2025-2030

Table 24 - Forecast Sales of Baked Goods by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Breakfast Cereals in Colombia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sales remain in a negative slump due to ongoing price sensitivity, albeit at less steep declines than seen last year

INDUSTRY PERFORMANCE

New product launches continue, despite sluggish performance

Health and wellness trends drive purchasing behaviour

WHAT'S NEXT?

Improving economic conditions will lead to increased demand

Manufacturers respond to demand for healthier options

On-the-go cereal packs will appeal to busy consumers

COMPETITIVE LANDSCAPE

Kellogg's leadership supported by ongoing innovations

Nutrimenti de Colombia one of few companies showing positive growth, thanks to respected local image

CHANNELS

Supermarkets and hypermarkets remain the key channels for breakfast cereals, thanks to wide array of products and special offers

Retail e-commerce sees growth in breakfast cereals, thanks to omnichannel strategies

CATEGORY DATA

Table 25 - Sales of Breakfast Cereals by Category: Volume 2020-2025

Table 26 - Sales of Breakfast Cereals by Category: Value 2020-2025
Table 27 - Sales of Breakfast Cereals by Category: % Volume Growth 2020-2025
Table 28 - Sales of Breakfast Cereals by Category: % Value Growth 2020-2025
Table 29 - NBO Company Shares of Breakfast Cereals: % Value 2021-2025
Table 30 - LBN Brand Shares of Breakfast Cereals: % Value 2022-2025
Table 31 - Distribution of Breakfast Cereals by Format: % Value 2020-2025
Table 32 - Forecast Sales of Breakfast Cereals by Category: Volume 2025-2030
Table 33 - Forecast Sales of Breakfast Cereals by Category: Value 2025-2030
Table 34 - Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2025-2030
Table 35 - Forecast Sales of Breakfast Cereals by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Processed Fruit and Vegetables in Colombia

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

CATEGORY DATA

Table 36 - Sales of Processed Fruit and Vegetables by Category: Volume 2020-2025
Table 37 - Sales of Processed Fruit and Vegetables by Category: Value 2020-2025
Table 38 - Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2020-2025
Table 39 - Sales of Processed Fruit and Vegetables by Category: % Value Growth 2020-2025
Table 40 - Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2020-2025
Table 41 - NBO Company Shares of Processed Fruit and Vegetables: % Value 2021-2025
Table 42 - LBN Brand Shares of Processed Fruit and Vegetables: % Value 2022-2025
Table 43 - Distribution of Processed Fruit and Vegetables by Format: % Value 2020-2025
Table 44 - Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2025-2030
Table 45 - Forecast Sales of Processed Fruit and Vegetables by Category: Value 2025-2030
Table 46 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2025-2030
Table 47 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Processed Meat, Seafood and Alternatives To Meat in Colombia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Value sales return to small positive growth, while volume sales remain in a slump

INDUSTRY PERFORMANCE

Price sensitivity continues to influence sales

Processed seafood benefits from offering value for money, supporting volume growth

WHAT'S NEXT?

Retail and foodservice will see positive growth over the forecast period

Convenience stores and on-the-go products will continue to expand

More meat and seafood substitutes set to appear in the market

COMPETITIVE LANDSCAPE

Zenú continues to benefit from its broad portfolio and ongoing innovations

Nutrimenti de Colombia benefits from expanded distribution of its popular Bary brand

CHANNELS

Small local grocers maintain lead, although smaller merchants are being impacted by taxes

Discounters continue to attract attention due to affordable quality and a growing assortment of products

CATEGORY DATA

Table 48 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

Table 49 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

Table 50 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2020-2025

Table 51 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2020-2025

Table 52 - Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 53 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 54 - Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 55 - Sales of Frozen Processed Poultry by Type: % Value Breakdown 2020-2025

Table 56 - Sales of Frozen Processed Seafood by Type: % Value Breakdown 2020-2025

Table 57 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2021-2025

Table 58 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2022-2025

Table 59 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2020-2025

Table 60 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2025-2030

Table 61 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2025-2030

COUNTRY REPORTS DISCLAIMER

[Rice, Pasta and Noodles in Colombia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sales of rice, pasta and noodles see an improved performance, supported by baseline demand

INDUSTRY PERFORMANCE

Packaged rice remains a staple in Colombian households

Instant noodle cups sees significant growth, thanks to offering convenience to busy consumers

WHAT'S NEXT?

Diversification and cultural influences influence ingredients and formats

Emerging opportunities for ready-to-eat rice and pasta

Colombian biofortified zinc: a promising solution to zinc deficiency

COMPETITIVE LANDSCAPE

Diana Corporación benefits from its strength in rice and widespread distribution

Option benefits from its all-format offering across noodles

CHANNELS

Modern outlets continue to put pressure on traditional channels

Discounters and convenience stores also embrace omnichannel strategies

CATEGORY DATA

Table 62 - Sales of Rice, Pasta and Noodles by Category: Volume 2020-2025

Table 63 - Sales of Rice, Pasta and Noodles by Category: Value 2020-2025

Table 64 - Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2020-2025

Table 65 - Sales of Rice, Pasta and Noodles by Category: % Value Growth 2020-2025

Table 66 - Sales of Instant Noodles by Leading Flavours: Rankings 2020-2025

Table 67 - NBO Company Shares of Rice, Pasta and Noodles: % Value 2021-2025

Table 68 - LBN Brand Shares of Rice, Pasta and Noodles: % Value 2022-2025

Table 69 - NBO Company Shares of Rice: % Value 2021-2025

Table 70 - LBN Brand Shares of Rice: % Value 2022-2025

Table 71 - NBO Company Shares of Pasta: % Value 2021-2025

Table 72 - LBN Brand Shares of Pasta: % Value 2022-2025

Table 73 - NBO Company Shares of Noodles: % Value 2021-2025

Table 74 - LBN Brand Shares of Noodles: % Value 2022-2025

Table 75 - Distribution of Rice, Pasta and Noodles by Format: % Value 2020-2025

Table 76 - Distribution of Rice by Format: % Value 2020-2025

Table 77 - Distribution of Pasta by Format: % Value 2020-2025

Table 78 - Distribution of Noodles by Format: % Value 2020-2025

Table 79 - Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2025-2030

Table 80 - Forecast Sales of Rice, Pasta and Noodles by Category: Value 2025-2030

Table 81 - Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2025-2030

Table 82 - Forecast Sales of Rice, Pasta and Noodles by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

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/staple-foods-in-colombia/report.