Staple Foods in Colombia

November 2025

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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

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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

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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

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

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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

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