



# Processed Meat, Seafood and Alternatives To Meat in Colombia

November 2025

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

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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

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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