



**Euromonitor
International**

Staple Foods in Colombia

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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

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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

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[Breakfast Cereals in Colombia](#)

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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

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

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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

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KEY DATA FINDINGS

2025 DEVELOPMENTS

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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

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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

CHANNELS

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