



Euromonitor
International

Coffee in Colombia

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KEY DATA FINDINGS

2025 DEVELOPMENTS

2025 developments reflect strengthened demand and growing premium orientation

INDUSTRY PERFORMANCE

Improved economic conditions and expanded channel presence support volume growth

Fresh coffee beans lead value and volume gains as specialty offerings proliferate

WHAT'S NEXT?

Moderate but sustained growth expected as new consumption occasions expand

Wider channel diversification expected through tailored pack sizes and format innovation

Functional coffee positioned for long-term growth as preventative health gains relevance

COMPETITIVE LANDSCAPE

Colcafé maintains leadership through diversified portfolios and expanded value formats

Tostao and Café Quindío gain momentum through premium repositioning and visibility boosts

CHANNELS

Traditional trade remains dominant but loses share as consumers shift toward discounters and modern retail

Discounters remain the most dynamic channel as expansion reshapes access and price competition

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Hot Drinks in Colombia - Industry Overview

EXECUTIVE SUMMARY

Economic stabilisation supports renewed household consumption despite persistent price pressures

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Premiumisation accelerates as consumers seek higher-quality experiences at home

Health and functionality strengthen as core drivers of consumption

Discount channels reshape competitive strategies and pricing architecture

WHAT'S NEXT?

Coffee to sustain growth as consumption occasions diversify

Tea to benefit from wellness positioning and digital engagement

Other hot drinks to post moderate volume gains but stronger value growth

COMPETITIVE LANDSCAPE

Leading companies deepen channel specialisation and affordability strategies

Most dynamic players accelerate innovation and visibility

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Local grocers remain dominant but lose share to discount retailers

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