Hot Drinks in Colombia

December 2025

Table of Contents

Hot Drinks in Colombia

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

CHANNELS

Local grocers remain dominant but lose share to discount retailers

Discount retailers reshape market dynamics as e-commerce gains traction

FOODSERVICE VS RETAIL SPLIT

MARKET DATA

Tea expected to maintain steady growth as health consciousness broadens consumption occasions
Health-driven innovation and the expansion of specialty tea retail expected to enhance category visibility
Market polarisation expected to intensify as private label and premium tiers expand

COMPETITIVE LANDSCAPE

Agricola Himalaya maintains leadership through wide channel reach and functional innovation
Stash strengthens premium positioning through unique flavours and expanded specialty retail presence

CHANNELS

Supermarkets and hypermarkets remain the core channel despite gradual share erosion
Discounters drive strongest growth as expansion and price advantage reshape purchasing behaviour

CATEGORY DATA

COUNTRY REPORTS DISCLAIMER

Other Hot Drinks in Colombia

KEY DATA FINDINGS

2025 DEVELOPMENTS

2025 developments reflect the influence of rising prices, health tax impacts and strengthened category engagement

INDUSTRY PERFORMANCE

Retail value sales increase as cocoa prices and fiscal measures drive strong price-led growth
Malt-based hot drinks strengthen their position through affordability and widespread distribution

WHAT'S NEXT?

Category expected to maintain healthy growth as value pricing and channel strategies support resilience
Brand engagement and experiential marketing expected to play a growing role in driving interest
Convenience-driven innovation set to shape the evolution of traditional chocolate consumption

COMPETITIVE LANDSCAPE

Cía Nacional de Chocolates SA maintains leadership through innovation, affordability and strong brand equity
Casa Luker emerges as one of the most dynamic players through varied price tiers and targeted marketing

CHANNELS

Supermarkets and hypermarkets remain the largest channels despite share losses
Discounters remain the most dynamic channel as expansion and affordability drive strong gains

CATEGORY DATA