



# Rice, Pasta and Noodles in Colombia

November 2025

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## 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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Modern outlets continue to put pressure on traditional channels

Discounters and convenience stores also embrace omnichannel strategies

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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  
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