



Dairy Products and Alternatives in Bolivia

August 2025

Table of Contents

Dairy Products and Alternatives in Bolivia

EXECUTIVE SUMMARY

Dairy products and alternatives in 2025: The big picture

Key trends in 2025

Competitive landscape

Channel developments

What next for dairy products and alternatives?

MARKET DATA

Table 1 - Sales of Dairy Products and Alternatives by Category: Value 2020-2025

Table 2 - Sales of Dairy Products and Alternatives by Category: % Value Growth 2020-2025

Table 3 - NBO Company Shares of Dairy Products and Alternatives: % Value 2021-2025

Table 4 - LBN Brand Shares of Dairy Products and Alternatives: % Value 2022-2025

Table 5 - Penetration of Private Label by Category: % Value 2020-2025

Table 6 - Distribution of Dairy Products and Alternatives by Format: % Value 2020-2025

Table 7 - Forecast Sales of Dairy Products and Alternatives by Category: Value 2025-2030

Table 8 - Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2025-2030

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby Food in Bolivia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Powder growing-up milk shows greatest resilience in challenging operating environment

Laboratorios Droguería INTI maintains its lead, gaining share from key rival Nestlé

Chained and independent pharmacies are pillars of baby food distribution

PROSPECTS AND OPPORTUNITIES

Economic pressures will continue to hinder baby food sales

Pharmacies will drive demand for specialised milk formula

Government efforts to combat child nutrition could impact baby food sales

CATEGORY DATA

Table 9 - Sales of Baby Food by Category: Volume 2020-2025

Table 10 - Sales of Baby Food by Category: Value 2020-2025

Table 11 - Sales of Baby Food by Category: % Volume Growth 2020-2025

Table 12 - Sales of Baby Food by Category: % Value Growth 2020-2025

Table 13 - Sales of Growing-Up Milk Formula by Age: % Value 2020-2025

Table 14 - NBO Company Shares of Baby Food: % Value 2021-2025

Table 15 - LBN Brand Shares of Baby Food: % Value 2022-2025

Table 16 - Distribution of Baby Food by Format: % Value 2020-2025

Table 17 - Forecast Sales of Baby Food by Category: Volume 2025-2030

Table 18 - Forecast Sales of Baby Food by Category: Value 2025-2030

Table 19 - Forecast Sales of Baby Food by Category: % Volume Growth 2025-2030

Table 20 - Forecast Sales of Baby Food by Category: % Value Growth 2025-2030

Butter and Spreads in Bolivia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Consumers switch to cheaper margarine as butter faces supply challenges
Industrias de Aceite SA holds sway while Cía de Alimentos Ltda gains ground
Small local grocers remain vital amid economic challenges

PROSPECTS AND OPPORTUNITIES

Margarines and cooking fats to gain ground as consumers adapt to price and supply pressures
Animal-based cooking fats to gain traction due to cost and authenticity concerns
Flavoured innovations will drive consumer interest in butter and margarine

CATEGORY DATA

Table 21 - Sales of Butter and Spreads by Category: Volume 2020-2025
Table 22 - Sales of Butter and Spreads by Category: Value 2020-2025
Table 23 - Sales of Butter and Spreads by Category: % Volume Growth 2020-2025
Table 24 - Sales of Butter and Spreads by Category: % Value Growth 2020-2025
Table 25 - NBO Company Shares of Butter and Spreads: % Value 2021-2025
Table 26 - LBN Brand Shares of Butter and Spreads: % Value 2022-2025
Table 27 - Distribution of Butter and Spreads by Format: % Value 2020-2025
Table 28 - Forecast Sales of Butter and Spreads by Category: Volume 2025-2030
Table 29 - Forecast Sales of Butter and Spreads by Category: Value 2025-2030
Table 30 - Forecast Sales of Butter and Spreads by Category: % Volume Growth 2025-2030
Table 31 - Forecast Sales of Butter and Spreads by Category: % Value Growth 2025-2030

Cheese in Bolivia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Cheese becomes more of a luxury as consumers focus on essentials
Local artisanal cheeses grow in importance
Small local grocers thrive amid economic challenges

PROSPECTS AND OPPORTUNITIES

Bolivian cheese industry to face short-term challenges
Artisanal and organic cheeses will gain traction among Bolivian consumers
Spreadable cheeses to increase in popularity

CATEGORY DATA

Table 32 - Sales of Cheese by Category: Volume 2020-2025
Table 33 - Sales of Cheese by Category: Value 2020-2025
Table 34 - Sales of Cheese by Category: % Volume Growth 2020-2025
Table 35 - Sales of Cheese by Category: % Value Growth 2020-2025
Table 36 - Sales of Spreadable Cheese by Type: % Value 2020-2025
Table 37 - Sales of Soft Cheese by Type: % Value 2020-2025
Table 38 - Sales of Hard Cheese by Type: % Value 2020-2025
Table 39 - NBO Company Shares of Cheese: % Value 2021-2025
Table 40 - LBN Brand Shares of Cheese: % Value 2022-2025
Table 41 - Distribution of Cheese by Format: % Value 2020-2025
Table 42 - Forecast Sales of Cheese by Category: Volume 2025-2030
Table 43 - Forecast Sales of Cheese by Category: Value 2025-2030
Table 44 - Forecast Sales of Cheese by Category: % Volume Growth 2025-2030
Table 45 - Forecast Sales of Cheese by Category: % Value Growth 2025-2030

Drinking Milk Products in Bolivia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Full fat milk shows greatest resilience as producers face rising costs
Pil Andina and Delizia successfully navigate market challenges
Small local grocers dominate distribution due to winning formula of proximity and price

PROSPECTS AND OPPORTUNITIES

Drinking milk products will show a more stable performance
Specialised stores will drive growth
EBA has potential to gain ground amid private sector shortages

CATEGORY DATA

Table 46 - Sales of Drinking Milk Products by Category: Volume 2020-2025
Table 47 - Sales of Drinking Milk Products by Category: Value 2020-2025
Table 48 - Sales of Drinking Milk Products by Category: % Volume Growth 2020-2025
Table 49 - Sales of Drinking Milk Products by Category: % Value Growth 2020-2025
Table 50 - NBO Company Shares of Drinking Milk Products: % Value 2021-2025
Table 51 - LBN Brand Shares of Drinking Milk Products: % Value 2022-2025
Table 52 - Distribution of Drinking Milk Products by Format: % Value 2020-2025
Table 53 - Forecast Sales of Drinking Milk Products by Category: Volume 2025-2030
Table 54 - Forecast Sales of Drinking Milk Products by Category: Value 2025-2030
Table 55 - Forecast Sales of Drinking Milk Products by Category: % Volume Growth 2025-2030
Table 56 - Forecast Sales of Drinking Milk Products by Category: % Value Growth 2025-2030

Yoghurt and Sour Milk Products in Bolivia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Yoghurt loses ground as consumers cut back on household expenses and companies streamline offerings
Pil Andina adapts to market conditions with affordable and functional offerings
Traditional outlets benefit from proximity and price

PROSPECTS AND OPPORTUNITIES

Yoghurt still offers potential for growth
Kefir and Greek yoghurt will gain ground as functional alternatives
Anticipated rising demand for immune-boosting probiotic yoghurts

CATEGORY DATA

Table 57 - Sales of Yoghurt and Sour Milk Products by Category: Volume 2020-2025
Table 58 - Sales of Yoghurt and Sour Milk Products by Category: Value 2020-2025
Table 59 - Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2020-2025
Table 60 - Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2020-2025
Table 61 - Sales of Flavoured Yoghurt by Flavour: Rankings 2020-2025
Table 62 - NBO Company Shares of Yoghurt and Sour Milk Products: % Value 2021-2025
Table 63 - LBN Brand Shares of Yoghurt and Sour Milk Products: % Value 2022-2025
Table 64 - Distribution of Yoghurt and Sour Milk Products by Format: % Value 2020-2025
Table 65 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Volume 2025-2030
Table 66 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Value 2025-2030
Table 67 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2025-2030
Table 68 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2025-2030

Other Dairy in Bolivia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Condensed and evaporated milk market faces challenges due to dependence on imports and rising prices

Pil Andina SA maintains leadership through robust distribution and commitment to innovation

Small local grocers continue to dominate sales

PROSPECTS AND OPPORTUNITIES

Uncertain outlook for other dairy products

Opportunities for innovation in terms of “better for you” offerings

Smuggling and counterfeiting pose continued threats

CATEGORY DATA

Table 69 - Sales of Other Dairy by Category: Volume 2020-2025

Table 70 - Sales of Other Dairy by Category: Value 2020-2025

Table 71 - Sales of Other Dairy by Category: % Volume Growth 2020-2025

Table 72 - Sales of Other Dairy by Category: % Value Growth 2020-2025

Table 73 - Sales of Cream by Type: % Value 2020-2025

Table 74 - NBO Company Shares of Other Dairy: % Value 2021-2025

Table 75 - LBN Brand Shares of Other Dairy: % Value 2022-2025

Table 76 - Distribution of Other Dairy by Format: % Value 2020-2025

Table 77 - Forecast Sales of Other Dairy by Category: Volume 2025-2030

Table 78 - Forecast Sales of Other Dairy by Category: Value 2025-2030

Table 79 - Forecast Sales of Other Dairy by Category: % Volume Growth 2025-2030

Table 80 - Forecast Sales of Other Dairy by Category: % Value Growth 2025-2030

Plant-Based Dairy in Bolivia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Plant-based dairy suffers amid economic and supply pressures

Pil Andina dominates sales, due to strategic pricing and distribution strategies

Retail evolution broadens availability of plant-based dairy

PROSPECTS AND OPPORTUNITIES

Soy milk remains the cornerstone of Bolivia’s plant-based dairy market, despite stronger growth of other plant-based varieties

Artisanal tofu and plant-based cheese could gain ground

Impostor Milk to drive plant-based innovation with local Amazon almond milk

CATEGORY DATA

Table 81 - Sales of Plant-Based Dairy by Category: Value 2020-2025

Table 82 - Sales of Plant-Based Dairy by Category: % Value Growth 2020-2025

Table 83 - Sales of Other Plant-Based Milk by Type: % Value 2022-2025

Table 84 - NBO Company Shares of Plant-Based Dairy: % Value 2021-2025

Table 85 - LBN Brand Shares of Plant-Based Dairy: % Value 2022-2025

Table 86 - Distribution of Plant-Based Dairy by Format: % Value 2020-2025

Table 87 - Forecast Sales of Plant-Based Dairy by Category: Value 2025-2030

Table 88 - Forecast Sales of Plant-Based Dairy by Category: % Value Growth 2025-2030

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/dairy-products-and-alternatives-in-bolivia/report.