



**Euromonitor
International**

Processed Meat, Seafood and Alternatives To Meat in Colombia

November 2025

KEY DATA FINDINGS

2025 DEVELOPMENTS

Value sales return to small positive growth, while volume sales remain in a slump

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

Small local grocers maintain lead, although smaller merchants are being impacted by taxes

Discounters continue to attract attention due to affordable quality and a growing assortment of products

CATEGORY DATA

Table 1 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

Table 2 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

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Staple Foods in Colombia - Industry Overview

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

MARKET DATA

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