



Euromonitor  
International

# Hot Drinks in Colombia

December 2025

Table of Contents

### 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

Table 1 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2020-2025

Table 2 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2020-2025

Table 3 - Retail Sales of Hot Drinks by Category: Volume 2020-2025

Table 4 - Retail Sales of Hot Drinks by Category: Value 2020-2025

Table 5 - Retail Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 6 - Retail Sales of Hot Drinks by Category: % Value Growth 2020-2025

Table 7 - Foodservice Sales of Hot Drinks by Category: Volume 2020-2025

Table 8 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 9 - Total Sales of Hot Drinks by Category: Total Volume 2020-2025

Table 10 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2020-2025

Table 11 - NBO Company Shares of Hot Drinks: % Retail Value 2021-2025

Table 12 - LBN Brand Shares of Hot Drinks: % Retail Value 2022-2025

Table 13 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2020-2025

Table 14 - Retail Distribution of Hot Drinks by Format: % Volume 2020-2025

Table 15 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2025

Table 16 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2025-2030

Table 17 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2025-2030

Table 18 - Forecast Retail Sales of Hot Drinks by Category: Volume 2025-2030

Table 19 - Forecast Retail Sales of Hot Drinks by Category: Value 2025-2030

Table 20 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 21 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2025-2030

Table 22 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2025-2030

Table 23 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 24 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2025-2030

Table 25 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

### SOURCES

Summary 1 - Research Sources

[Coffee in Colombia](#)

### 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

#### CATEGORY DATA

Table 26 - Retail Sales of Coffee by Category: Volume 2020-2025

Table 27 - Retail Sales of Coffee by Category: Value 2020-2025

Table 28 - Retail Sales of Coffee by Category: % Volume Growth 2020-2025

Table 29 - Retail Sales of Coffee by Category: % Value Growth 2020-2025

Table 30 - Retail Sales of Fresh Ground Coffee Pods by Hard vs Soft: % Volume 2020-2025

Table 31 - NBO Company Shares of Coffee: % Retail Value 2021-2025

Table 32 - LBN Brand Shares of Coffee: % Retail Value 2022-2025

Table 33 - Forecast Retail Sales of Coffee by Category: Volume 2025-2030

Table 34 - Forecast Retail Sales of Coffee by Category: Value 2025-2030

Table 35 - Forecast Retail Sales of Coffee by Category: % Volume Growth 2025-2030

Table 36 - Forecast Retail Sales of Coffee by Category: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

[Tea in Colombia](#)

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

2025 developments highlight growing interest in wellness-led and functional infusions

#### INDUSTRY PERFORMANCE

Retail value sales increase in 2025 as wellness positioning drives renewed demand

Fruit and herbal tea continues to lead growth through flavour innovation and functional appeal

#### WHAT'S NEXT?

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

Table 37 - Retail Sales of Tea by Category: Volume 2020-2025  
Table 38 - Retail Sales of Tea by Category: Value 2020-2025  
Table 39 - Retail Sales of Tea by Category: % Volume Growth 2020-2025  
Table 40 - Retail Sales of Tea by Category: % Value Growth 2020-2025  
Table 41 - NBO Company Shares of Tea: % Retail Value 2021-2025  
Table 42 - LBN Brand Shares of Tea: % Retail Value 2022-2025  
Table 43 - Forecast Retail Sales of Tea by Category: Volume 2025-2030  
Table 44 - Forecast Retail Sales of Tea by Category: Value 2025-2030  
Table 45 - Forecast Retail Sales of Tea by Category: % Volume Growth 2025-2030  
Table 46 - Forecast Retail Sales of Tea by Category: % Value Growth 2025-2030

## 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

Table 47 - Retail Sales of Other Hot Drinks by Category: Volume 2020-2025  
Table 48 - Retail Sales of Other Hot Drinks by Category: Value 2020-2025  
Table 49 - Retail Sales of Other Hot Drinks by Category: % Volume Growth 2020-2025

Table 50 - Retail Sales of Other Hot Drinks by Category: % Value Growth 2020-2025

Table 51 - NBO Company Shares of Other Hot Drinks: % Retail Value 2021-2025

Table 52 - LBN Brand Shares of Other Hot Drinks: % Retail Value 2022-2025

Table 53 - Forecast Retail Sales of Other Hot Drinks by Category: Volume 2025-2030

Table 54 - Forecast Retail Sales of Other Hot Drinks by Category: Value 2025-2030

Table 55 - Forecast Retail Sales of Other Hot Drinks by Category: % Volume Growth 2025-2030

Table 56 - Forecast Retail Sales of Other Hot Drinks by Category: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

### About Euromonitor International

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/hot-drinks-in-colombia/report](http://www.euromonitor.com/hot-drinks-in-colombia/report).