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COLLABORATION & LOGISTICS PERFORMANCE IN COLOMBIA

LOGYCA / COLDEX 2026





COLLABORATION MATURITY

Executive Summary of Results and Gap-Closing Strategies

LOGYCA / COLDEX

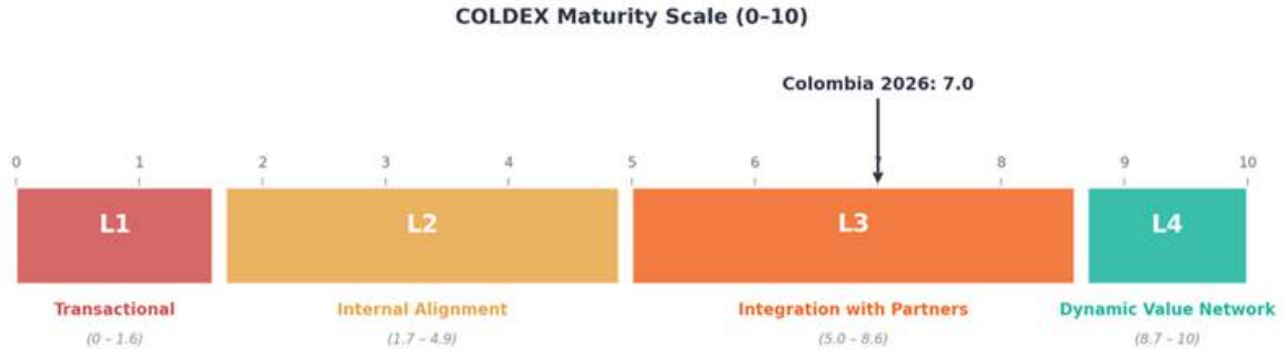
After a decade of measuring collaboration maturity across Colombian value networks — on a 0–10 scale with four maturity levels — LOGYCA / COLDEX 2026 delivers a sobering message: the country has plateaued at Level 3 (Integration with Partners). The national index closed 2026 at 7.0, sustained on 18,500 valid bilateral evaluations across five sectors, with Consumer Goods accounting for 72% of the sample base. This summary distills the findings most relevant to the ECR community.

KEY TAKEAWAY

Companies with the lowest logistics cost have the highest collaboration index. Operational efficiency is no longer built individually — it is built through the network.

How to read this report

COLDEX rates collaborative maturity on a 0–10 scale built from bilateral evaluations: the chain (retailer or distributor) rates the industrial it trades with, and the industrial rates the chain that distributes its product. Scores are mapped to four maturity levels, from purely transactional relationships to fully integrated dynamic value networks. Colombia currently sits in **Level 3 — Integration with Partners,** the stage where chain and industrial coordinate processes but do not yet co-create or co-innovate as a network.



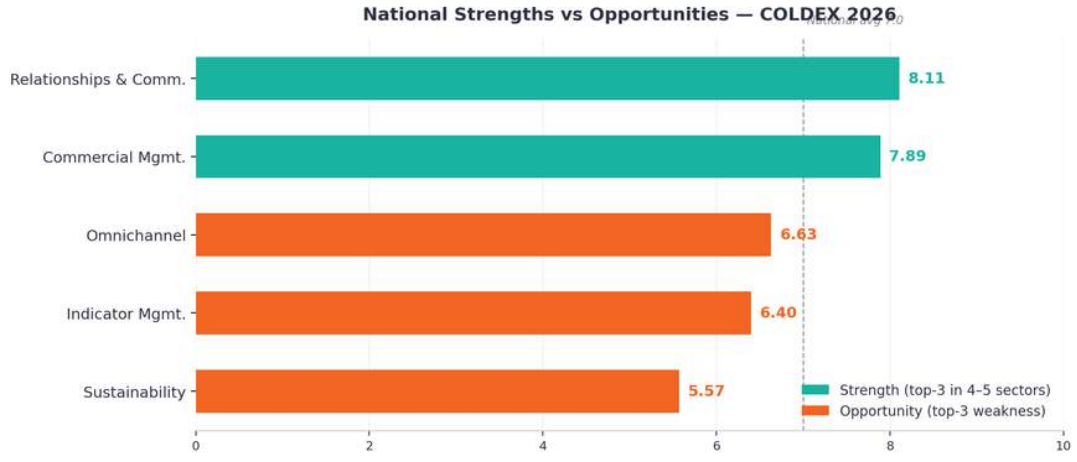
A plateau, not a setback

The COLDEX index peaked at 7.4 in 2019 and 2021 and has since drifted to 7.0 in 2026, with a sustained decline between 2023 and 2025. The trajectory is shaped by three forces: external disruptions (domestic inflation, Red Sea, Panama Canal), a broader and more diverse sample that incorporates less mature companies, and — most relevant strategically — a Colombian collaborative model that has not been able to break through the Level 3 ceiling after a decade.



National strengths and opportunities

COLDEX measures collaborative maturity across themes. Two emerge as consolidated national strengths — appearing as top-3 in nearly every sector. Three emerge as top-3 weaknesses in most sectors, marking the strategic opportunities for 2026.

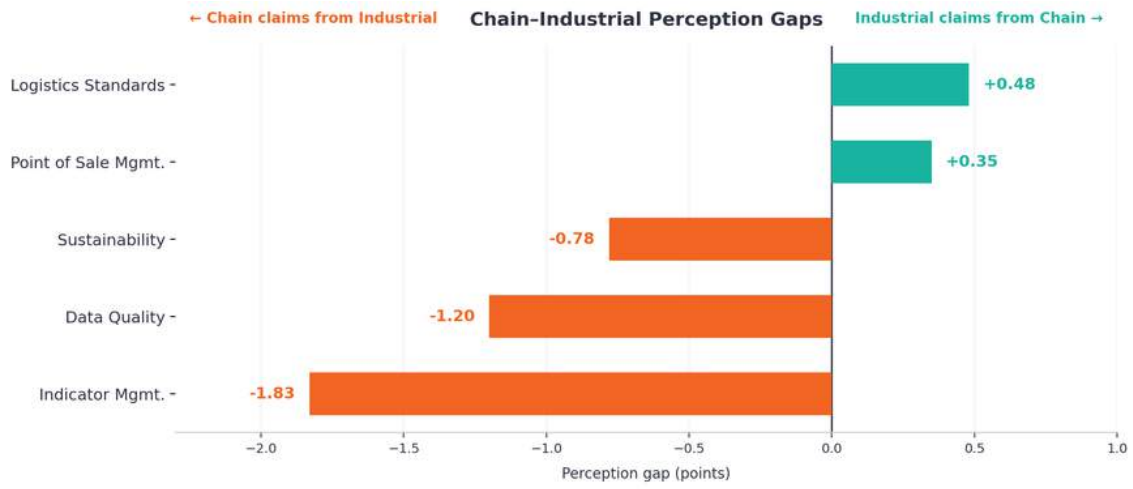


STRATEGIC INSIGHT

Colombia collaborates in the conversation, but not in the measurement. The national strength is relating to each other; the structural opportunities are measuring jointly, integrating digitally, and producing sustainably.

Chain vs Industrial: what each side claims from the other

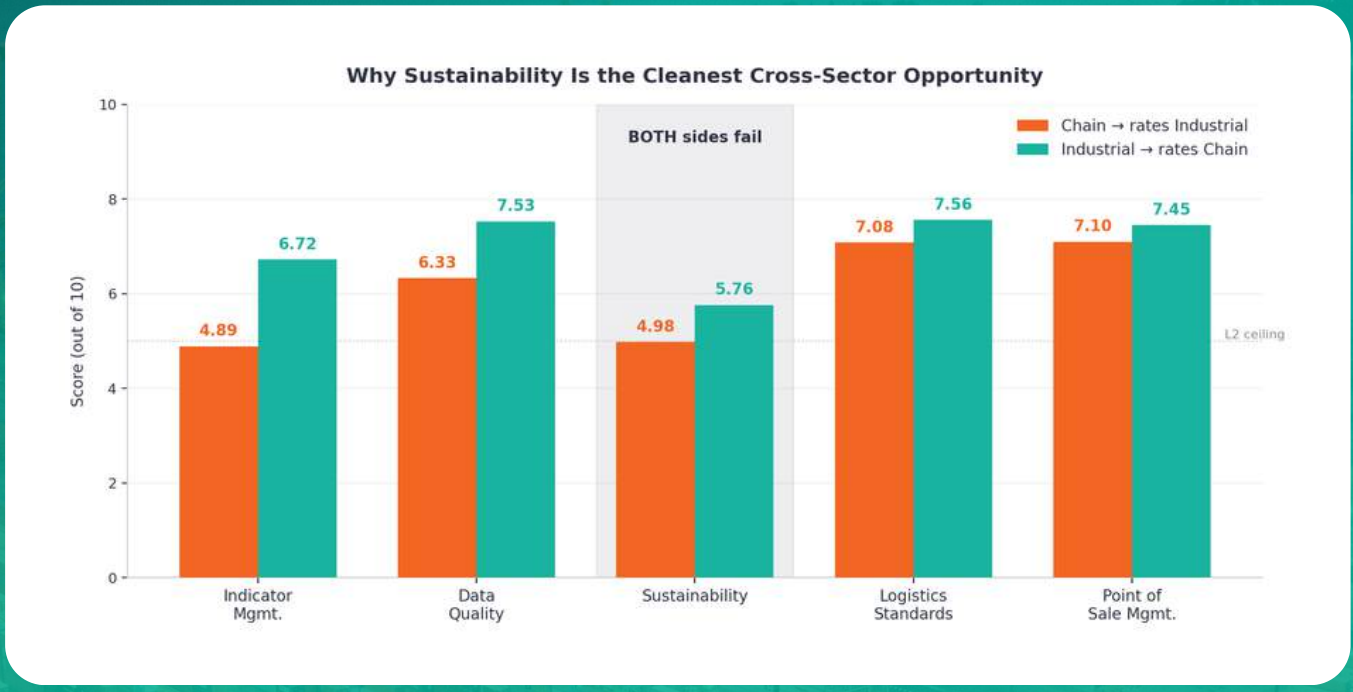
COLDEX is not self-rated. Each side of the table evaluates the other: the chain rates the industrial it trades with, and vice versa. Nationally, industrial actors receive on average 0.20 points more than the chain — a marginal aggregate that hides specific themes with gaps of up to 1.83 points.



The chain identifies opportunities in planning, data and indicators on the industrial side. The industrial identifies opportunities in operational execution on the chain side. Each side signals different opportunities, and both are valid.

Sustainability: the cleanest cross-sector opportunity

In most themes there are clear asymmetries: one side rates higher, the other lower. In Sustainability, both sides share the same low starting point — and both stay near the Level 2 ceiling. This makes it the theme with the greatest potential for joint advancement: no side is ahead and no side is behind.



Consumer Goods defines the country

Consumer Goods is the largest sector in the study (56.1% of evaluated companies in 2026, up from 24.5% in 2017). Its sectoral score (7.13) is practically identical to the national average (7.19) — by statistical construction, what happens here defines what happens with the country's indicator.

The sector excels at the last mile (Returns Management, Point of Sale, Logistics Management) but fails at joint planning. The lowest indicator of the national study appears precisely here: Consumer Goods chains rate industrial actors at 4.48 (Level 2) in Indicator Management. If Consumer Goods aligns, the national indicator rises. If not, COLDEX will remain stalled at L3 mid.

Proposed strategies for closing the gaps

The opportunities COLDEX 2026 identifies are not new problems. What is new is that the study gives the exact magnitude of each gap and the side where it originates, enabling surgical pilots instead of generic solutions.

- **Sustainability as a sectoral initiative** — the only theme where both sides fail (L2 nationally). Coordinated initiative led by LOGYCA, not bilateral negotiation. Pilot in Consumer Goods, focused on packaging, surplus management and shared logistics footprint.

• **Shared indicators and data** — the largest gap in the study (1.83 nationally) lives in Indicator Management. Sectoral dashboard of common indicators with a pilot group of leading chains and industrials, measured and published quarterly.

• **Omnichannel** — Colombian e-commerce reached COP $145.4 trillion in 2025 (+21.6% interannual in Q3). The low collaborative-omnichannel score is a competitive risk. Round table to define minimum digital integration standards: shared catalogs, real-time inventory, marketplace integration, cross-channel order traceability.

Logistics performance in Colombia

LOGYCA / COLDEX

Operational Performance

The Logistics Performance Study 2026 measures six operational indicators across the Colombian value network. The paired-sample analysis shows a system in transition: improvements in planning, but warning signals in transportation efficiency and returns.

Paired-sample headlines (2024 → 2025)

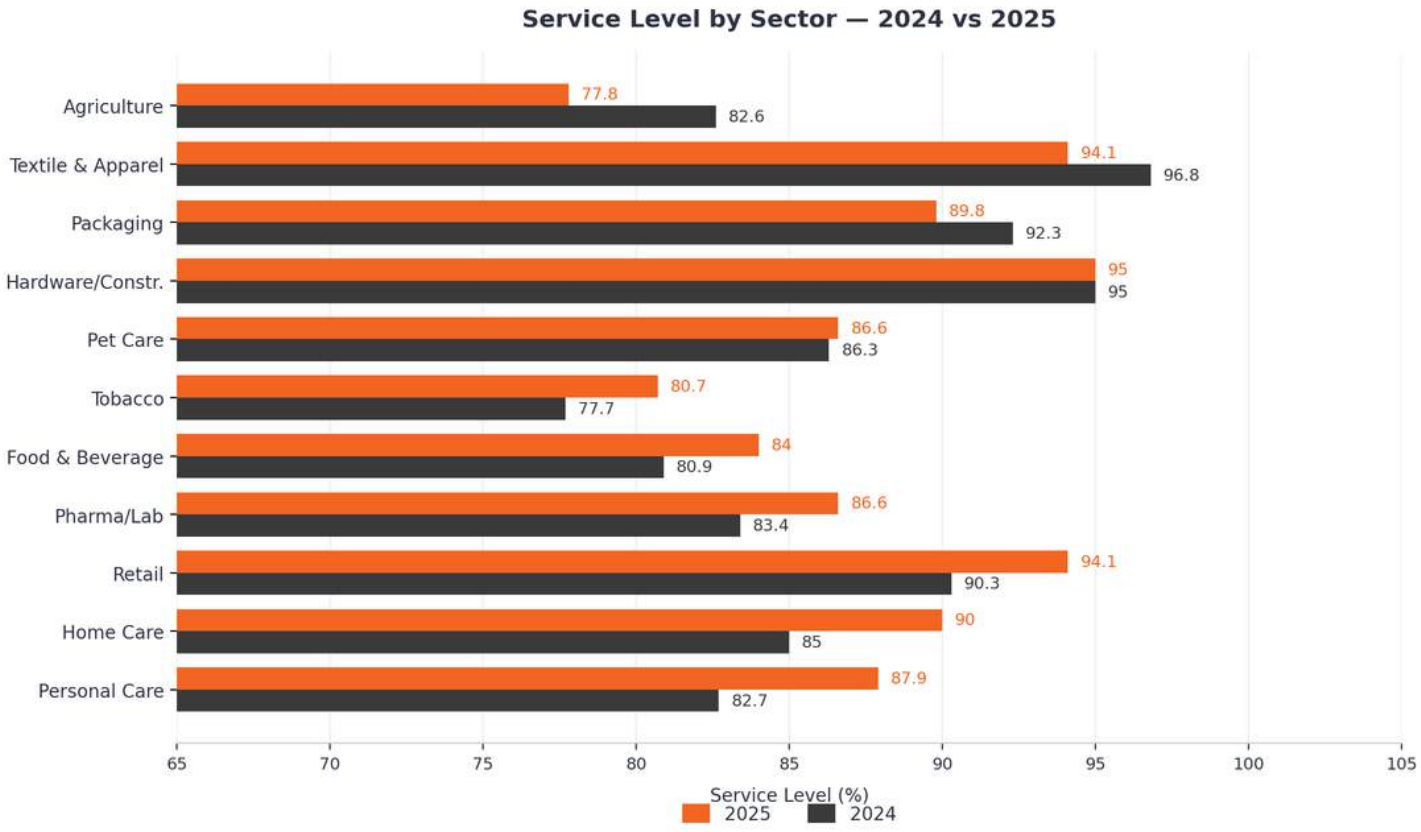
Indicator	2024	2025	Δ delta
Service Level	826%	857%	**+3.1 pp**
Returns	20%	29%	**+0.9 pp**
Days of Inventory	48.1 days	40.5 days	**−7.6 days**
Transport Utilization	821%	730%	**−9.2 pp**
Forecast Accuracy	790%	829%	**+3.9 pp**
Logistics Cost / Sales	38%	40%	**+0.2 pp**

STRATEGIC INSIGHT

The generalized improvement in service level is not uniform. The risk lies in the "silent setbacks": sectors like Agriculture and Packaging retreat while the average improves — a sign that end-to-end visibility remains the difference between growing and falling behind.

Service Level: positive trend, silent risks

Service level rose from **85.4% to 86.6%** at the sectoral level. But the sectoral reading hides a more nuanced story: six sectors improve, three retreat. **Only 25% of companies have explored certified deliveries, and 76% expressed interest in joint service-level improvement initiatives** — the appetite for collaboration is high; what is missing is the structure to channel it.



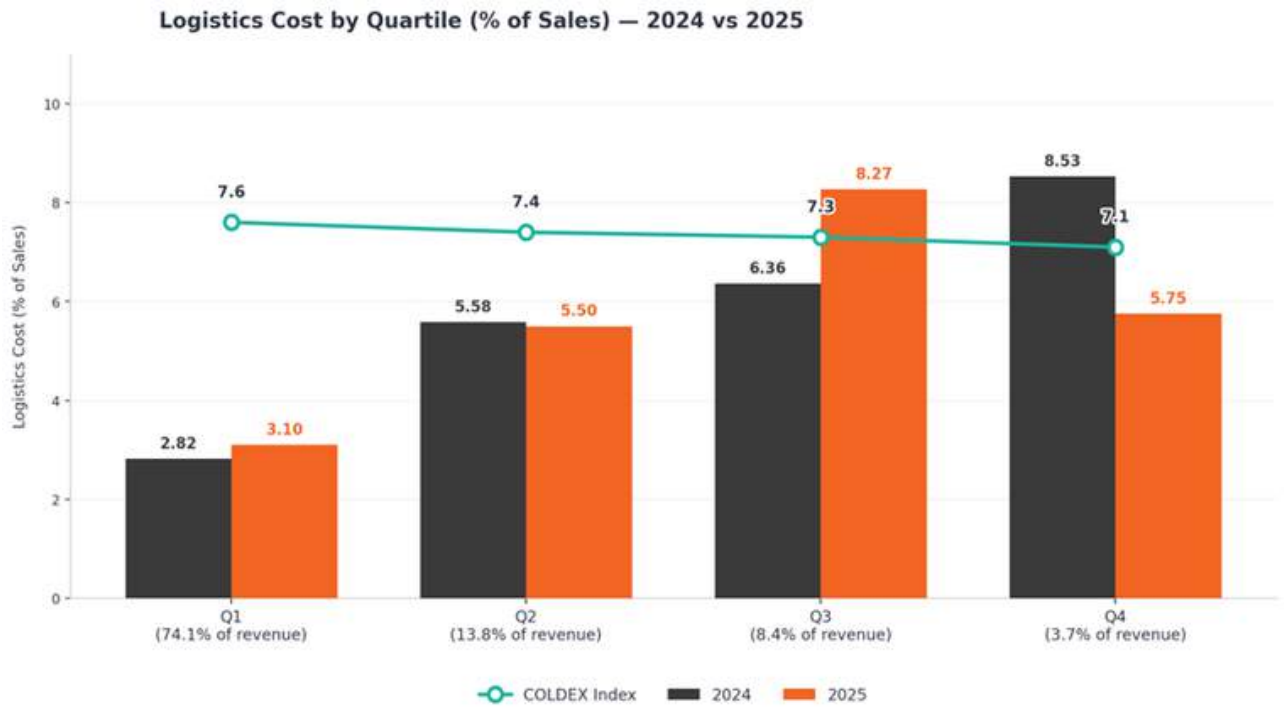
Forecast Accuracy: the highest ROI lever available

Forecast accuracy improved from **79.0% to 82.9% (+3.9 pp),** but several key sectors are still below the **90%** reference threshold. **45%** of companies still use historical data as their primary forecasting method, and only **22%** have integrated planning through scenario analysis.

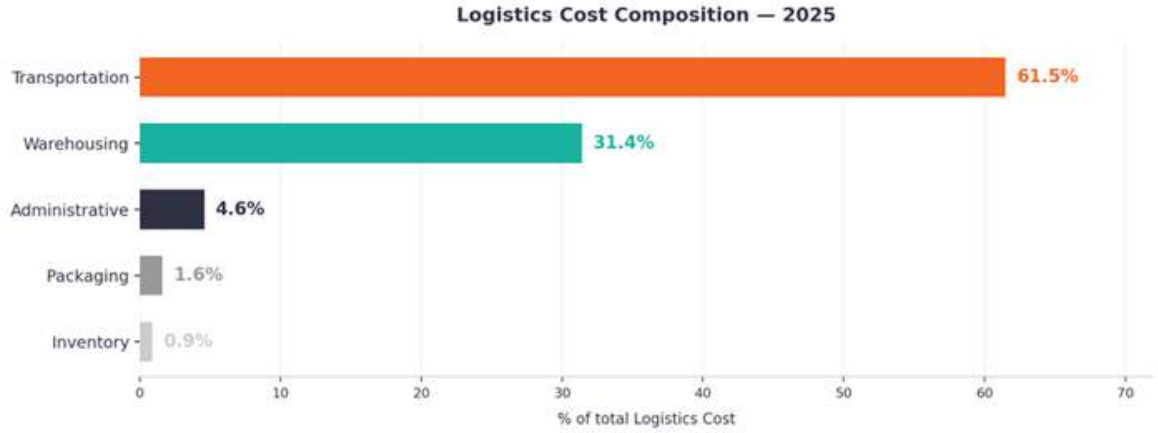
The statistical correlation confirms what supply chain literature has been saying for decades: greater forecast accuracy implies fewer returns ($r = -0.443$, $p<0.05$) and lower logistics cost ($r = -0.295$, $p<0.1$). Moving from historical-based forecasting to collaborative forecasting with customer-demand data is the maturity leap with the greatest impact available to Colombian companies today. CPFR, S&OP and predictive AI models are already available; the barrier is organizational and cultural, not technological.

Logistics Cost: the financial thermometer

FLogistics cost over sales remained nearly stable in total sample **(3.970% → 3.967%),** but the quartile analysis reveals a redistribution of efficiencies: Q4 — the companies with highest cost — improved notably **(–2.78 pp),** while Q3 rose significantly **(+1.91 pp).**



Two cost components dominate the entire system, leaving the largest lever — transport consolidation — still underexplored.



3. Returns and Refunds

52% of companies have not explored load consolidation practices, and only 15% apply them frequently. According to Ministry of Transport and DNP data, each 10 percentage points of additional transport utilization can translate into 8–12% reduction in unit logistics cost.

THE CENTRAL FINDING

Companies with the lowest logistics cost have the highest collaboration index. Efficiency is not achieved individually; it is built through the network.

What this means for the ECR community

Breaking through the COLDEX plateau will not depend on better individual operations — Colombia already knows how to operate. It will depend on building three things the study identifies as the most acute structural gaps: shared indicators between chain and industrial, a sectoral approach to sustainability rather than bilateral negotiation, and a coordinated response to digital channels that already represent **COP $145.4 trillion** in annual transactions.

For ECR Colombia and the regional Latin American community, three lines of work emerge with particular relevance:

- **Cross-sector sustainability initiative** — the cleanest opportunity in the study. Both sides start from Level 2, with no power asymmetry blocking the collaborative practice.
- S**hared sectoral indicators dashboard** — a working group with leading chains and industrials to migrate the conversation from "we have indicators" to "we share the same indicators".
- **Omnichannel as a strategic risk** — defining minimum digital integration standards before the gap with digital-native commerce widens further.

The full report — including detailed methodology, sectoral breakdowns and the analytical model used — is available upon request.

Source: LOGYCA / COLDEX 2026 and EDL 2026 — Logistics Performance Study
Based on Larry Lapide (MIT CTL, 2008) and David Teece (UC Berkeley, 2007)
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