

Consumer Foodservice in Colombia

February 2024

Table of Contents

Consumer Foodservice in Colombia

EXECUTIVE SUMMARY

Consumer foodservice in 2023: The big picture 2023 key trends Competitive landscape Independent foodservice developments What next for consumer foodservice?

MARKET DATA

Table 1 - Units, Transactions and Value Sales in Consumer Foodservice 2018-2023
Table 2 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2018-2023
Table 3 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2023
Table 4 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2018-2023
Table 5 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2018-2023
Table 6 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2023
Table 7 - Sales in Consumer Foodservice by Location: % Foodservice Value 2018-2023
Table 8 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2019-2023
Table 9 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2020-2023
Table 10 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2023
Table 11 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2023-2028
Table 12 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Cafés/Bars in Colombia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Several cafés forced to restructure Significant number of openings of juice/smoothie bars Independent bars/pubs benefitting from growing popularity of craft beers

PROSPECTS AND OPPORTUNITIES

Continued premiumisation of bars/pubs Growing synergy between retail and foodservice Discerning consumers drive continued growth in specialist coffee shops

CATEGORY DATA

Table 13 - Cafés/Bars by Category: Units/Outlets 2018-2023
Table 14 - Sales in Cafés/Bars by Category: Number of Transactions 2018-2023
Table 15 - Sales in Cafés/Bars by Category: Foodservice Value 2018-2023
Table 16 - Cafés/Bars by Category: % Units/Outlets Growth 2018-2023
Table 17 - Sales in Cafés/Bars by Category: % Transaction Growth 2018-2023
Table 18 - Sales in Cafés/Bars by Category: % Foodservice Value Growth 2018-2023
Table 19 - GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2019-2023
Table 20 - GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2020-2023
Table 21 - Forecast Cafés/Bars by Category: Units/Outlets 2023-2028
Table 22 - Forecast Sales in Cafés/Bars by Category: Number of Transactions 2023-2028
Table 23 - Forecast Sales in Cafés/Bars by Category: Foodservice Value 2023-2028

Table 24 - Forecast Cafés/Bars by Category: % Units/Outlets Growth 2023-2028Table 25 - Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2023-2028Table 26 - Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2023-2028

Full-Service Restaurants in Colombia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Breakfast presents new consumption opportunity Colombian cuisine gaining growing global reputation High staff turnover continues to impact service

PROSPECTS AND OPPORTUNITIES

Introduction of health tax on ultra-processed food could have significant impact Implementation of sodium law could impact imports Increasing threat from limited-service restaurants

CATEGORY DATA

Table 27 - Full-Service Restaurants by Category: Units/Outlets 2018-2023
Table 28 - Sales in Full-Service Restaurants by Category: Number of Transactions 2018-2023
Table 29 - Sales in Full-Service Restaurants by Category: Foodservice Value 2018-2023
Table 30 - Full-Service Restaurants by Category: % Units/Outlets Growth 2018-2023
Table 31 - Sales in Full-Service Restaurants by Category: % Transaction Growth 2018-2023
Table 32 - Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2018-2023
Table 33 - GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2019-2023
Table 34 - GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2020-2023
Table 35 - Forecast Full-Service Restaurants by Category: Units/Outlets 2023-2028
Table 36 - Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2023-2028
Table 37 - Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2023-2028
Table 38 - Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2023-2028
Table 39 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2023-2028
Table 39 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2023-2028
Table 39 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2023-2028
Table 39 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2023-2028
Table 39 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2023-2028
Table 39 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2023-2028
Table 40 - Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2023-2028

Limited-Service Restaurants in Colombia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Profit margins hit by continuing rising costs Digitalisation continues but at a slower pace Consumers adopt cost-saving strategies

PROSPECTS AND OPPORTUNITIES

A slowdown in construction of shopping centres could impact limited-service restaurants Opportunity for growth in smaller cities Introduction of health tax on ultra-processed food could have significant impact

CATEGORY DATA

Table 41 - Limited-Service Restaurants by Category: Units/Outlets 2018-2023

- Table 42 Sales in Limited-Service Restaurants by Category: Number of Transactions 2018-2023
- Table 43 Sales in Limited-Service Restaurants by Category: Foodservice Value 2018-2023

Table 44 - Limited-Service Restaurants by Category: % Units/Outlets Growth 2018-2023

 Table 45 - Sales in Limited-Service Restaurants by Category: % Transaction Growth 2018-2023

Table 46 - Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2018-2023

Table 47 - GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2019-2023

Table 48 - GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2020-2023

Table 49 - Forecast Limited-Service Restaurants by Category: Units/Outlets 2023-2028

Table 50 - Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2023-2028

Table 51 - Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2023-2028

Table 52 - Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2023-2028

Table 53 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2023-2028

Table 54 - Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2023-2028

Self-Service Cafeterias in Colombia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Arrival of global brand IKEA boosts sector Self-service cafeterias mostly located in retailers Self-service cafeterias limit price rises

PROSPECTS AND OPPORTUNITIES

Remote working and direct delivery pose threat Traditional "almuerzo ejectivo" significant competitor Other speedier lunch offerings gaining popularity

CATEGORY DATA

Table 55 - Self-Service Cafeterias: Units/Outlets 2018-2023
Table 56 - Sales in Self-Service Cafeterias: Number of Transactions 2018-2023
Table 57 - Sales in Self-Service Cafeterias: Foodservice Value 2018-2023
Table 58 - Sales in Self-Service Cafeterias: % Units/Outlets Growth 2018-2023
Table 59 - Sales in Self-Service Cafeterias: % Transaction Growth 2018-2023
Table 60 - Sales in Self-Service Cafeterias: % Foodservice Value Growth 2018-2023
Table 61 - Forecast Self-Service Cafeterias: Units/Outlets 2023-2028
Table 62 - Forecast Sales in Self-Service Cafeterias: Number of Transactions 2023-2028
Table 63 - Forecast Sales in Self-Service Cafeterias: % Units/Outlets Growth 2023-2028
Table 64 - Forecast Self-Service Cafeterias: % Units/Outlets Growth 2023-2028
Table 65 - Forecast Sales in Self-Service Cafeterias: % Units/Outlets Growth 2023-2028

Table 66 - Forecast Sales in Self-Service Cafeterias: % Foodservice Value Growth 2023-2028

Street Stalls/Kiosks in Colombia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Colombian street food is varied and reflects the country's culinary diversity. Street stalls key source of employment for economy Street stalls seen as affordable option, as inflation remains high

PROSPECTS AND OPPORTUNITIES

Moderate growth over forecast period Bogotá looks to regulate informal vendors in public spaces. Kiosk chain Cocheros sees further value decline

CATEGORY DATA

Table 67 - Street Stalls/Kiosks: Units/Outlets 2018-2023

Table 68 - Sales in Street Stalls/Kiosks: Number of Transactions 2018-2023
Table 69 - Sales in Street Stalls/Kiosks: Foodservice Value 2018-2023
Table 70 - Street Stalls/Kiosks: % Units/Outlets Growth 2018-2023
Table 71 - Sales in Street Stalls/Kiosks: % Transaction Growth 2018-2023
Table 72 - Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2018-2023
Table 73 - GBO Company Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2019-2023
Table 74 - GBN Brand Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2020-2023
Table 75 - Forecast Street Stalls/Kiosks: Units/Outlets 2023-2028
Table 76 - Forecast Sales in Street Stalls/Kiosks: Foodservice Value 2023-2028
Table 77 - Forecast Street Stalls/Kiosks: % Units/Outlets Growth 2023-2028
Table 78 - Forecast Street Stalls/Kiosks: % Transaction Growth 2023-2028
Table 79 - Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2023-2028
Table 79 - Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2023-2028
Table 79 - Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2023-2028
Table 79 - Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2023-2028
Table 79 - Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2023-2028
Table 80 - Forecast Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2023-2028

Consumer Foodservice By Location in Colombia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Virtual restaurants an emerging offering New cultural venues sought after locations for consumer foodservice Hotels increasingly offer popular foodservice options

PROSPECTS AND OPPORTUNITIES

Revamped airports increasingly offer well known consumer foodservice brands Standalone locations increasingly relevant over forecast period

CATEGORY DATA

Table 81 - Consumer Foodservice by Location: Units/Outlets 2018-2023 Table 82 - Sales in Consumer Foodservice by Location: Number of Transactions 2018-2023 Table 83 - Sales in Consumer Foodservice by Location: Foodservice Value 2018-2023 Table 84 - Consumer Foodservice by Location: % Units/Outlets Growth 2018-2023 Table 85 - Sales in Consumer Foodservice by Location: % Transaction Growth 2018-2023 Table 86 - Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2018-2023 Table 87 - Consumer Foodservice through Standalone: Units/Outlets 2018-2023 Table 88 - Sales in Consumer Foodservice through Standalone: Number of Transactions 2018-2023 Table 89 - Sales in Consumer Foodservice through Standalone: Foodservice Value 2018-2023 Table 90 - Consumer Foodservice through Standalone: % Units/Outlets Growth 2018-2023 Table 91 - Sales in Consumer Foodservice through Standalone: % Transaction Growth 2018-2023 Table 92 - Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2018-2023 Table 93 - Consumer Foodservice through Leisure: Units/Outlets 2018-2023 Table 94 - Sales in Consumer Foodservice through Leisure: Number of Transactions 2018-2023 Table 95 - Sales in Consumer Foodservice through Leisure: Foodservice Value 2018-2023 Table 96 - Consumer Foodservice through Leisure: % Units/Outlets Growth 2018-2023 Table 97 - Sales in Consumer Foodservice through Leisure: % Transaction Growth 2018-2023 Table 98 - Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2018-2023 Table 99 - Consumer Foodservice through Retail: Units/Outlets 2018-2023 Table 100 - Sales in Consumer Foodservice through Retail: Number of Transactions 2018-2023 Table 101 - Sales in Consumer Foodservice through Retail: Foodservice Value 2018-2023 Table 102 - Consumer Foodservice through Retail: % Units/Outlets Growth 2018-2023 Table 103 - Sales in Consumer Foodservice through Retail: % Transaction Growth 2018-2023 Table 104 - Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2018-2023 Table 105 - Consumer Foodservice through Lodging: Units/Outlets 2018-2023

Page 5 of 7

Table 106 - Sales in Consumer Foodservice through Lodging: Number of Transactions 2018-2023 Table 107 - Sales in Consumer Foodservice through Lodging: Foodservice Value 2018-2023 Table 108 - Consumer Foodservice through Lodging: % Units/Outlets Growth 2018-2023 Table 109 - Sales in Consumer Foodservice through Lodging: % Transaction Growth 2018-2023 Table 110 - Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2018-2023 Table 111 - Consumer Foodservice through Travel: Units/Outlets 2018-2023 Table 112 - Sales in Consumer Foodservice through Travel: Number of Transactions 2018-2023 Table 113 - Sales in Consumer Foodservice through Travel: Foodservice Value 2018-2023 Table 114 - Consumer Foodservice through Travel: % Units/Outlets Growth 2018-2023 Table 115 - Sales in Consumer Foodservice through Travel: % Transaction Growth 2018-2023 Table 116 - Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2018-2023 Table 117 - Forecast Consumer Foodservice by Location: Units/Outlets 2023-2028 Table 118 - Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2023-2028 Table 119 - Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2023-2028 Table 120 - Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2023-2028 Table 121 - Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2023-2028 Table 122 - Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2023-2028 Table 123 - Forecast Consumer Foodservice through Standalone: Units/Outlets 2023-2028 Table 124 - Forecast Sales in Consumer Foodservice through Standalone: Number of Transactions 2023-2028 Table 125 - Forecast Sales in Consumer Foodservice through Standalone: Foodservice Value 2023-2028 Table 126 - Forecast Consumer Foodservice through Standalone: % Units/Outlets Growth 2023-2028 Table 127 - Forecast Sales in Consumer Foodservice through Standalone: % Transaction Growth 2023-2028 Table 128 - Forecast Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2023-2028 Table 129 - Forecast Consumer Foodservice through Leisure: Units/Outlets 2023-2028 Table 130 - Forecast Sales in Consumer Foodservice through Leisure: Number of Transactions 2023-2028 Table 131 - Forecast Sales in Consumer Foodservice through Leisure: Foodservice Value 2023-2028 Table 132 - Forecast Consumer Foodservice through Leisure: % Units/Outlets Growth 2023-2028 Table 133 - Forecast Sales in Consumer Foodservice through Leisure: % Transaction Growth 2023-2028 Table 134 - Forecast Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2023-2028 Table 135 - Forecast Consumer Foodservice through Retail: Units/Outlets 2023-2028 Table 136 - Forecast Sales in Consumer Foodservice through Retail: Number of Transactions 2023-2028 Table 137 - Forecast Sales in Consumer Foodservice through Retail: Foodservice Value 2023-2028 Table 138 - Forecast Consumer Foodservice through Retail: % Units/Outlets Growth 2023-2028 Table 139 - Forecast Sales in Consumer Foodservice through Retail: % Transaction Growth 2023-2028 Table 140 - Forecast Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2023-2028 Table 141 - Forecast Consumer Foodservice through Lodging: Units/Outlets 2023-2028 Table 142 - Forecast Sales in Consumer Foodservice through Lodging: Number of Transactions 2023-2028 Table 143 - Forecast Sales in Consumer Foodservice through Lodging: Foodservice Value 2023-2028 Table 144 - Forecast Consumer Foodservice through Lodging: % Units/Outlets Growth 2023-2028 Table 145 - Forecast Sales in Consumer Foodservice through Lodging: % Transaction Growth 2023-2028 Table 146 - Forecast Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2023-2028 Table 147 - Forecast Consumer Foodservice through Travel: Units/Outlets 2023-2028 Table 148 - Forecast Sales in Consumer Foodservice through Travel: Number of Transactions 2023-2028 Table 149 - Forecast Sales in Consumer Foodservice through Travel: Foodservice Value 2023-2028 Table 150 - Forecast Consumer Foodservice through Travel: % Units/Outlets Growth 2023-2028 Table 151 - Forecast Sales in Consumer Foodservice through Travel: % Transaction Growth 2023-2028 Table 152 - Forecast Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2023-2028

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/consumer-foodservice-in-colombia/report.