



Euromonitor
International

Consumer Foodservice in Colombia

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EXECUTIVE SUMMARY

Resilience and growth despite an increasingly challenging environment

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

A growing market despite inflationary pressures

Delivery development marked by profitability, speed, and new models

Average spend boosted through value-driven experiences

WHAT'S NEXT?

Transformation and moderate growth

Menus, channels, and new formats are key fronts of innovation

Building value through responsible sourcing and transparent narratives

COMPETITIVE LANDSCAPE

Crepes & Waffles consolidates its position as market leader in 2025

Rapid expansion and a strong origin story drive Café Quindío's double-digit growth

Frisby's legal dispute reinforces brand pride and consolidates customer loyalty

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Chained restaurants maintain steady growth, while independents show flexibility

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Cafés/Bars in Colombia

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2025 DEVELOPMENTS

Diversity and creativity outweigh scale

INDUSTRY PERFORMANCE

Diversification and innovation sustain growth in coffee shops and bars

Specialist coffee and tea shops expand as consumers seek quality and variety
Cafés and bars leverage omnichannel and on-site strategies to boost competitiveness

WHAT'S NEXT?

Independent and hybrid spaces drive the future of the category
Large brands lead omnichannel efforts, while independents rely on closeness, community and emotional connection
Consumers value product origin, sustainability, natural ingredients, and purpose-driven brands

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2025 DEVELOPMENTS

Value growth in 2025 reflects higher prices rather than real expansion

INDUSTRY PERFORMANCE

Full-service restaurants maintain sales in a high-cost environment
Cultural relevance and local sourcing fuel growth of Latin American full-service restaurants
Business groups more resilient to inflation and volatile input costs

WHAT'S NEXT?

Transformation to meet the needs of more well-travelled, demanding, and knowledgeable customers
High-value delivery to manage peak demand and strengthening customer loyalty
A more active nighttime ecosystem as a growth engine for full-service restaurants

COMPETITIVE LANDSCAPE

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INDUSTRY PERFORMANCE

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Turbo operation reshapes profitability and strategy in delivery

WHAT'S NEXT?

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Self-Service Cafeterias in Colombia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Category remains complementary to retail

INDUSTRY PERFORMANCE

Self-service cafeterias lack a strong or well-structured value proposition

IKEA cafeterias lead in terms of innovation and growth

Retail-integrated self-service cafeterias put convenience over differentiation

WHAT'S NEXT?

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Carulla's experimental self-service cafeterias elevate retail dining

COMPETITIVE LANDSCAPE

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Street Stalls/Kiosks in Colombia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Street stalls/kiosks appeal, offering affordable prices, proximity, and convenience

INDUSTRY PERFORMANCE

With rising food prices and a loss of purchasing power, street stalls/kiosks are an attractive option for consumers

Burgers are the most popular and profitable street fast food option

From streets to social media, fulfilment in urban food is evolving

WHAT'S NEXT?

Further growth supported by proximity and mobility of street stalls/kiosks
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COMPETITIVE LANDSCAPE

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[Consumer Foodservice By Location in Colombia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Expansion of airports and gastronomic districts drives growth in 2025

INDUSTRY PERFORMANCE

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Opportunity for standalone restaurants with the development of gastronomic clusters

WHAT'S NEXT?

Entertainment venues with a more curated gastronomic offer
Standalone restaurants to expand with urban development
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CATEGORY DATA

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