

Consumer Foodservice in Colombia

February 2023

Table of Contents

Consumer Foodservice in Colombia

EXECUTIVE SUMMARY

Consumer foodservice in 2022: The big picture

2022 key trends

Competitive landscape

Independent foodservice developments

What next for consumer foodservice?

MARKET DATA

Table 1 - Units, Transactions and Value Sales in Consumer Foodservice 2017-2022

Table 2 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2017-2022

Table 3 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2022

Table 4 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2017-2022

Table 5 - Sales in Consumer Foodservice by Eat-In vs Delivery and To-Go: % Foodservice Value 2017-2022

Table 6 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2017-2022

Table 7 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2022

Table 8 - Sales in Consumer Foodservice by Online/Offline Ordering: % Foodservice Value 2017-2022

Table 9 - Sales in Consumer Foodservice by Location: % Foodservice Value 2017-2022

Table 10 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2018-2022

Table 11 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2019-2022

Table 12 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2022

Table 13 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2022-2027

Table 14 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2022-2027

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Cafés/Bars in Colombia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Security is one of the main barriers for consumers in engaging in night entertainment (rumba) in Colombia

The rains of 2022, caused by the "La Niña" phenomenon, affect the performance of night entertainment activities

Independent coffee shops benefit from strong popularity of speciality coffees

PROSPECTS AND OPPORTUNITIES

Establishment of the Land Management Plan, divides the types of locations in which cafés/bars can operate

The decline in juice bars continues over the forecast period

Increase in premium consumption benefits breweries, pubs and specialist coffee and tea shops in the medium and long term

CATEGORY DATA

Table 15 - Cafés/Bars by Category: Units/Outlets 2017-2022

Table 16 - Sales in Cafés/Bars by Category: Number of Transactions 2017-2022

Table 17 - Sales in Cafés/Bars by Category: Foodservice Value 2017-2022

Table 18 - Cafés/Bars by Category: % Units/Outlets Growth 2017-2022

Table 19 - Sales in Cafés/Bars by Category: % Transaction Growth 2017-2022

Table 20 - Sales in Cafés/Bars by Category: % Foodservice Value Growth 2017-2022

Table 21 - GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2018-2022

Table 22 - GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2019-2022

Table 23 - Forecast Cafés/Bars by Category: Units/Outlets 2022-2027

Table 24 - Forecast Sales in Cafés/Bars by Category: Number of Transactions 2022-2027

Table 25 - Forecast Sales in Cafés/Bars by Category: Foodservice Value 2022-2027

Table 26 - Forecast Cafés/Bars by Category: % Units/Outlets Growth 2022-2027

Table 27 - Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2022-2027

Table 28 - Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2022-2027

Full-Service Restaurants in Colombia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Difficulties in finding staff characterise 2022 as working practices change since the onset of the pandemic

Industry players in full-service restaurants invest in online ordering

Meat supplies see significant cost hikes affecting the profits of many full-service restaurants

PROSPECTS AND OPPORTUNITIES

Local consumers focus on Colombian ingredients stimulating growing interest in local preparations and locally sourced raw materials

Terraces become a fact of life and add value to full-service restaurants

Well-known chefs open new outlets offering menus at affordable prices

CATEGORY DATA

Table 29 - Full-Service Restaurants by Category: Units/Outlets 2017-2022

Table 30 - Sales in Full-Service Restaurants by Category: Number of Transactions 2017-2022

Table 31 - Sales in Full-Service Restaurants by Category: Foodservice Value 2017-2022

Table 32 - Full-Service Restaurants by Category: % Units/Outlets Growth 2017-2022

Table 33 - Sales in Full-Service Restaurants by Category: % Transaction Growth 2017-2022

Table 34 - Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2017-2022

Table 35 - GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2018-2022

Table 36 - GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2019-2022

Table 37 - Forecast Full-Service Restaurants by Category: Units/Outlets 2022-2027

Table 38 - Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2022-2027

Table 39 - Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2022-2027

Table 40 - Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2022-2027

Table 41 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2022-2027

Table 42 - Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2022-2027

Limited-Service Restaurants in Colombia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Restaurants develop strategies to deal with high rents in the most frequented or exclusive areas of cities

Digital menus become regulated after being open to abuse and misleading consumers

In response to rising raw material costs, restaurants endeavour to maintain prices by making changes to their menus

Increasing costs of public services and rents lead to an increase in consumer prices

PROSPECTS AND OPPORTUNITIES

Restaurants depend less on the operation of third-mile operators

A gradual recovery of outlets that closed during the pandemic over the forecast period

Growing movement towards more diverse and healthy menus

CATEGORY DATA

Table 43 - Limited-Service Restaurants by Category: Units/Outlets 2017-2022

Table 44 - Sales in Limited-Service Restaurants by Category: Number of Transactions 2017-2022

- Table 45 - Sales in Limited-Service Restaurants by Category: Foodservice Value 2017-2022
- Table 46 - Limited-Service Restaurants by Category: % Units/Outlets Growth 2017-2022
- Table 47 - Sales in Limited-Service Restaurants by Category: % Transaction Growth 2017-2022
- Table 48 - Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2017-2022
- Table 49 - GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2018-2022
- Table 50 - GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2019-2022
- Table 51 - Forecast Limited-Service Restaurants by Category: Units/Outlets 2022-2027
- Table 52 - Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2022-2027
- Table 53 - Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2022-2027
- Table 54 - Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2022-2027
- Table 55 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2022-2027
- Table 56 - Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2022-2027

Self-Service Cafeterias in Colombia

KEY DATA FINDINGS

2022 DEVELOPMENTS

The pandemic has a significant impact on self-service cafeterias with the channel still recovering from a sharp drop in number of outlets. The new trends of delivery and working from home further hamper self-service cafeterias. Jumbo, Éxito and Carulla have developed self-service cafeterias, but mostly to cater to shoppers and not as a business that is expected to grow and diversify.

PROSPECTS AND OPPORTUNITIES

Ikea's offer in self-service cafeterias proves a winner as this channel is so little explored in Colombia. New working from home trends among employees and students further weaken channel sales over the forecast period. Self-service cafeterias strongly related to retail stores.

CATEGORY DATA

- Table 57 - Self-Service Cafeterias: Units/Outlets 2017-2022
- Table 58 - Sales in Self-Service Cafeterias: Number of Transactions 2017-2022
- Table 59 - Sales in Self-Service Cafeterias: Foodservice Value 2017-2022
- Table 60 - Sales in Self-Service Cafeterias: % Units/Outlets Growth 2017-2022
- Table 61 - Sales in Self-Service Cafeterias: % Transaction Growth 2017-2022
- Table 62 - Sales in Self-Service Cafeterias: % Foodservice Value Growth 2017-2022
- Table 63 - Forecast Self-Service Cafeterias: Units/Outlets 2022-2027
- Table 64 - Forecast Sales in Self-Service Cafeterias: Number of Transactions 2022-2027
- Table 65 - Forecast Sales in Self-Service Cafeterias: Foodservice Value 2022-2027
- Table 66 - Forecast Self-Service Cafeterias: % Units/Outlets Growth 2022-2027
- Table 67 - Forecast Sales in Self-Service Cafeterias: % Transaction Growth 2022-2027
- Table 68 - Forecast Sales in Self-Service Cafeterias: % Foodservice Value Growth 2022-2027

Street Stalls/Kiosks in Colombia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Cocheros, the only brand in this category is unable to regularise its activity after a decline in the number of its outlets at the height of the pandemic. Street stalls/kiosks offers a high-recovery business opportunity for families who lost jobs during the pandemic. Delivery options now available via WhatsApp.

PROSPECTS AND OPPORTUNITIES

Local government authorities seek to regulate the activities and sales of street stalls/kiosks. Changes to payment methods stimulated by the pandemic also affect informal street stalls/kiosks.

Delivery via WhatsApp remains a feature for many street stalls/kiosks

CATEGORY DATA

Table 69 - Street Stalls/Kiosks: Units/Outlets 2017-2022

Table 70 - Sales in Street Stalls/Kiosks: Number of Transactions 2017-2022

Table 71 - Sales in Street Stalls/Kiosks: Foodservice Value 2017-2022

Table 72 - Street Stalls/Kiosks: % Units/Outlets Growth 2017-2022

Table 73 - Sales in Street Stalls/Kiosks: % Transaction Growth 2017-2022

Table 74 - Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2017-2022

Table 75 - GBO Company Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2018-2022

Table 76 - GBN Brand Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2019-2022

Table 77 - Forecast Street Stalls/Kiosks: Units/Outlets 2022-2027

Table 78 - Forecast Sales in Street Stalls/Kiosks: Number of Transactions 2022-2027

Table 79 - Forecast Sales in Street Stalls/Kiosks: Foodservice Value 2022-2027

Table 80 - Forecast Street Stalls/Kiosks: % Units/Outlets Growth 2022-2027

Table 81 - Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2022-2027

Table 82 - Forecast Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2022-2027

Consumer Foodservice By Location in Colombia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Airports see growing attention from chained players in consumer foodservice

Hotels diversify their offer in order to better compete in consumer foodservice

The expansion of shopping centres stimulates the recovery of outlets by the main restaurant chains in the country

PROSPECTS AND OPPORTUNITIES

Strong expansion in sports and concert venues in Colombia

Virtual brands that are not reliant on one location are growing in importance among consumers

Normalisation of consumer foodservice sales reliant on the recovery of tourism and in the successful response to the home working trend

CATEGORY DATA

Table 83 - Consumer Foodservice by Location: Units/Outlets 2017-2022

Table 84 - Sales in Consumer Foodservice by Location: Number of Transactions 2017-2022

Table 85 - Sales in Consumer Foodservice by Location: Foodservice Value 2017-2022

Table 86 - Consumer Foodservice by Location: % Units/Outlets Growth 2017-2022

Table 87 - Sales in Consumer Foodservice by Location: % Transaction Growth 2017-2022

Table 88 - Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2017-2022

Table 89 - Consumer Foodservice through Standalone: Units/Outlets 2017-2022

Table 90 - Sales in Consumer Foodservice through Standalone: Number of Transactions 2017-2022

Table 91 - Sales in Consumer Foodservice through Standalone: Foodservice Value 2017-2022

Table 92 - Consumer Foodservice through Standalone: % Units/Outlets Growth 2017-2022

Table 93 - Sales in Consumer Foodservice through Standalone: % Transaction Growth 2017-2022

Table 94 - Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2017-2022

Table 95 - Consumer Foodservice through Leisure: Units/Outlets 2017-2022

Table 96 - Sales in Consumer Foodservice through Leisure: Number of Transactions 2017-2022

Table 97 - Sales in Consumer Foodservice through Leisure: Foodservice Value 2017-2022

Table 98 - Consumer Foodservice through Leisure: % Units/Outlets Growth 2017-2022

Table 99 - Sales in Consumer Foodservice through Leisure: % Transaction Growth 2017-2022

Table 100 - Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2017-2022

Table 101 - Consumer Foodservice through Retail: Units/Outlets 2017-2022

Table 102 - Sales in Consumer Foodservice through Retail: Number of Transactions 2017-2022

Table 103 - Sales in Consumer Foodservice through Retail: Foodservice Value 2017-2022

Table 104 - Consumer Foodservice through Retail: % Units/Outlets Growth 2017-2022
Table 105 - Sales in Consumer Foodservice through Retail: % Transaction Growth 2017-2022
Table 106 - Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2017-2022
Table 107 - Consumer Foodservice through Lodging: Units/Outlets 2017-2022
Table 108 - Sales in Consumer Foodservice through Lodging: Number of Transactions 2017-2022
Table 109 - Sales in Consumer Foodservice through Lodging: Foodservice Value 2017-2022
Table 110 - Consumer Foodservice through Lodging: % Units/Outlets Growth 2017-2022
Table 111 - Sales in Consumer Foodservice through Lodging: % Transaction Growth 2017-2022
Table 112 - Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2017-2022
Table 113 - Consumer Foodservice through Travel: Units/Outlets 2017-2022
Table 114 - Sales in Consumer Foodservice through Travel: Number of Transactions 2017-2022
Table 115 - Sales in Consumer Foodservice through Travel: Foodservice Value 2017-2022
Table 116 - Consumer Foodservice through Travel: % Units/Outlets Growth 2017-2022
Table 117 - Sales in Consumer Foodservice through Travel: % Transaction Growth 2017-2022
Table 118 - Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2017-2022
Table 119 - Forecast Consumer Foodservice by Location: Units/Outlets 2022-2027
Table 120 - Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2022-2027
Table 121 - Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2022-2027
Table 122 - Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2022-2027
Table 123 - Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2022-2027
Table 124 - Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2022-2027
Table 125 - Forecast Consumer Foodservice through Standalone: Units/Outlets 2022-2027
Table 126 - Forecast Sales in Consumer Foodservice through Standalone: Number of Transactions 2022-2027
Table 127 - Forecast Sales in Consumer Foodservice through Standalone: Foodservice Value 2022-2027
Table 128 - Forecast Consumer Foodservice through Standalone: % Units/Outlets Growth 2022-2027
Table 129 - Forecast Sales in Consumer Foodservice through Standalone: % Transaction Growth 2022-2027
Table 130 - Forecast Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2022-2027
Table 131 - Forecast Consumer Foodservice through Leisure: Units/Outlets 2022-2027
Table 132 - Forecast Sales in Consumer Foodservice through Leisure: Number of Transactions 2022-2027
Table 133 - Forecast Sales in Consumer Foodservice through Leisure: Foodservice Value 2022-2027
Table 134 - Forecast Consumer Foodservice through Leisure: % Units/Outlets Growth 2022-2027
Table 135 - Forecast Sales in Consumer Foodservice through Leisure: % Transaction Growth 2022-2027
Table 136 - Forecast Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2022-2027
Table 137 - Forecast Consumer Foodservice through Retail: Units/Outlets 2022-2027
Table 138 - Forecast Sales in Consumer Foodservice through Retail: Number of Transactions 2022-2027
Table 139 - Forecast Sales in Consumer Foodservice through Retail: Foodservice Value 2022-2027
Table 140 - Forecast Consumer Foodservice through Retail: % Units/Outlets Growth 2022-2027
Table 141 - Forecast Sales in Consumer Foodservice through Retail: % Transaction Growth 2022-2027
Table 142 - Forecast Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2022-2027
Table 143 - Forecast Consumer Foodservice through Lodging: Units/Outlets 2022-2027
Table 144 - Forecast Sales in Consumer Foodservice through Lodging: Number of Transactions 2022-2027
Table 145 - Forecast Sales in Consumer Foodservice through Lodging: Foodservice Value 2022-2027
Table 146 - Forecast Consumer Foodservice through Lodging: % Units/Outlets Growth 2022-2027
Table 147 - Forecast Sales in Consumer Foodservice through Lodging: % Transaction Growth 2022-2027
Table 148 - Forecast Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2022-2027
Table 149 - Forecast Consumer Foodservice through Travel: Units/Outlets 2022-2027
Table 150 - Forecast Sales in Consumer Foodservice through Travel: Number of Transactions 2022-2027
Table 151 - Forecast Sales in Consumer Foodservice through Travel: Foodservice Value 2022-2027
Table 152 - Forecast Consumer Foodservice through Travel: % Units/Outlets Growth 2022-2027
Table 153 - Forecast Sales in Consumer Foodservice through Travel: % Transaction Growth 2022-2027
Table 154 - Forecast Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2022-2027

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.