



Cafés/Bars in Colombia

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Table of Contents

Cafés/Bars in Colombia - Category analysis

KEY DATA FINDINGS

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

COMPETITIVE LANDSCAPE

Companies focus on broadening consumption occasions to increase ticket size

Café Quindío benefits from the rise of coffee tourism

Independent specialist coffee shops thrive, offering high-quality coffee and engaging experiences

CATEGORY DATA

Table 1 - Cafés/Bars by Category: Units/Outlets 2020-2025

Table 2 - Sales in Cafés/Bars by Category: Number of Transactions 2020-2025

Table 3 - Sales in Cafés/Bars by Category: Foodservice Value 2020-2025

Table 4 - Cafés/Bars by Category: % Units/Outlets Growth 2020-2025

Table 5 - Sales in Cafés/Bars by Category: % Transaction Growth 2020-2025

Table 6 - Sales in Cafés/Bars by Category: % Foodservice Value Growth 2020-2025

Table 7 - GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2021-2025

Table 8 - GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2022-2025

Table 9 - Forecast Cafés/Bars by Category: Units/Outlets 2025-2030

Table 10 - Forecast Sales in Cafés/Bars by Category: Number of Transactions 2025-2030

Table 11 - Forecast Sales in Cafés/Bars by Category: Foodservice Value 2025-2030

Table 12 - Forecast Cafés/Bars by Category: % Units/Outlets Growth 2025-2030

Table 13 - Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2025-2030

Table 14 - Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2025-2030

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Consumer Foodservice in Colombia - Industry Overview

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

CHANNELS

Chained restaurants maintain steady growth, while independents show flexibility

Format innovation is becoming a key strategy

MARKET DATA

Table 15 - Units, Transactions and Value Sales in Consumer Foodservice 2020-2025

Table 16 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2020-2025

Table 17 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2025

Table 18 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2020-2025

Table 19 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2020-2025

Table 20 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2025

Table 21 - Sales in Consumer Foodservice by Location: % Foodservice Value 2020-2025

Table 22 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2020-2025

Table 23 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2025

Table 24 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2022-2025

Table 25 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2025

Table 26 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2025-2030

Table 27 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2025-2030

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SOURCES

Summary 1 - Research Sources

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