



Cafés/Bars in Colombia

March 2026

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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

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

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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

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