



Euromonitor
International

Full-Service Restaurants in Colombia

March 2026

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KEY DATA FINDINGS

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

- Leading Crepes & Waffles boasts a strong national and international presence
- Wok exemplifies sustainable leadership
- Independent operators lead due the complexity of scaling a restaurant

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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

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