



Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Required Report - public distribution

Date: 8/18/2000

GAIN Report #CO0027

Colombia

Poultry and Products

Annual

2000

Approved by:

David G. Salmon, Agricultural Attaché
U.S. Embassy, Bogota. Colombia

Drafted by:

Leonardo Pinzon, Agricultural Specialist

Report Highlights: Although poultry meat prices have been erratic, meat production is expected to rise 5 percent in calendar 2000. Egg output in 2000 is projected to increase 1.5 percent to 8,380 million eggs. Consumption of poultry meat in 2000 is calculated at 690,000 tons, five percent above 1999. Chicken meat imports increased by 5 percent in 1999 and should continue to increase at a 5-percent rate.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
Annual Report
Bogota[CO1],CO

Table of Contents

Executive Summary	1
Production	1
Consumption	2
Trade	2
1. Chicken meat Imports	3
2. Egg Imports	3
3. Day-old Chick Imports	4
Stocks	4
1. Export Plant Certification	4
2. Import Licensing and Duties	4
3. Tariff and Non-Tariff Barriers	5
4. Pre-shipment Inspection Requirement	5
5. Export Subsidies	5
6. Domestic Product Absorption Requirement	5
Marketing	6
Import Requirements	6
1. Import Requirements for Poultry Meat (whole birds), not transformed	6
2. Poultry Parts (fresh, chilled or frozen)	7
3. Mechanically Deboned Chicken	8
4. Poultry Meat - Transformed (fresh, chilled or frozen)	9
Potential Importers	11
1. Poultry Product Producers and Processors	11
2. Poultry Meat Processors and Importers	12
Tables	15
Poultry Meat, Total - Production, Supply and Demand, 1999-2001	15
Poultry Meat, Chicken-16 wks - Production, Supply and Demand, 1999-2001	16
Imports of Poultry Meat, Total, 2000 (Tons)	17
Prices of Poultry Meat at the Retail Market, 1999-2000 (Pesos per kilogram)	18
Poultry, Eggs - Production, Supply and Demand, 1999-2001	19
Exports of Poultry, Eggs, 1999 (Million eggs)	20
Imports of Poultry, Eggs, 1999 (Million eggs)	21
Prices of Poultry Eggs at the Retail Market, 1999-2000 (Pesos per dozen)	22

Executive Summary

The Colombian poultry industry has shown erratic indications of recovery in 2000 which induce to expect a more stable trend in the near future. However, these indications are encouraging after the 3 percent decline in broiler output in 1999. Egg production rose 3 percent in 1999. For the current 2000, broiler output is expected to grow by 5 percent while eggs are projected at 2 percent. These increases are explained mainly by the recovery in demand due to the economic recovery which has also given indications of improvement for some sectors. Chicken meat imports in 2000 are calculated at 19,000 tons (\$34 million), 5 percent above 1999, mainly supplied by the United States. Colombia has been importing mechanically deboned chicken (MDC) since 1993. Total import value of MDC in 1999 reached \$6 million (10,000 tons), virtually all supplied by the United States. Colombian egg imports in 2000 are estimated at 54 million units (\$8 million). About 70 percent of all egg imported in 1999 were for consumption, 27 percent dried and liquid eggs, and the remain hatching egg. Ecuador was the main supplier of eggs for human consumption, because of its lower price. Besides legal imports, there is also a contraband market from Ecuador, which is estimated at above one million eggs per year. Imports of poultry meat, as whole birds, are subject to absorption policies, which are a significant brake on trade. Colombia's export certification period for U.S. meat plants expired on October 5, 1999, but an extension was granted until the GOC will implement a new inspection certification system.

Production

Although *poultry meat* prices have been erratic, meat production grew by 6 percent on an annualized basis during the first six months of the year and is expected to rise 5 percent in calendar 2000. The slow economic recovery underway should stimulate consumer demand for poultry products. Poultry industry officials forecast a further four percent increase in broiler output in year 2001. This growth rate will probably be maintained for the next few years.

About 25 percent of all Colombian broilers are raised on farms with a production capacity of less than 20,000 birds, including five percent on small peasant farms. Another 45 percent is produced on farms with a capacity of 20,000 to 80,000 broilers. The remaining 30 percent is produced on farms with a capacity in excess of 80,000 broilers. Production units of 20,000 or more birds use modern technology, similar to that utilized in the United States. The ten largest commercial broiler operations account for 23 percent of Colombia's total broiler population.

Egg output in 2000 is projected to increase 1.5 percent to 8,380 million eggs. Another three-percent increase is forecast for 2001. The outlook for the following three years calls for a similar rate of growth. Although prices for both eggs and broilers have been erratic in the first half of 2000, growers are confident and intend to expand output in the second half of 2000.

One-fourth of Colombia's egg production comes from farms with fewer than 25,000 hens, including about five percent produced on very small peasant farms. Farms with a capacity of 25,000 to 100,000 birds contribute about 44 percent of total egg output and the rest is supplied by farms with more than 100,000 layers. The ten largest egg operations account for 26 percent of the total layer population. The largest egg production operation in Colombia has 1.1 million hens.

Domestic production of poultry meat and eggs is not subsidized by the government of Colombia (GOC). All inputs, including credit, required by Colombia's poultry industry are obtained at market

prices.

Local producers, together with the GOC, have developed a relatively effective program to control poultry diseases. New Castle disease first occurred here in 1950, and occasional minor outbreaks routinely occur every year. In July 1999, the APHIS equivalent Colombian Agricultural Institute (ICA) and the Colombian Poultry Growers Federation (FENAVI) launched a campaign to control New Castle and to eradicate it eventually. Eradication of this disease would open foreign markets to Colombian poultry products.

Consumption

Consumption of *Poultry meat* in 2000, both broiler and hen meat, is calculated at 690,000 tons, five percent above 1999, after declining 3 percent a year before. This expected growth in consumption is due mainly to the economic recovery in 2000, which should improve demand. Four-percent growth is projected for 2001, as improved demand is expected to remain steady. Consumers favor chicken over other meat alternatives, due to price and health concerns. In addition, poultry meat is about half the price of beef.

Annual per capita consumption of chicken meat in Colombia is estimated at 12 kilograms, 50 percent higher than a decade ago. The increase in consumption reflects a shift away from beef into poultry. Currently, poultry meat accounts for 40 percent of total meat consumption

Some 35 percent of the country's chicken meat is marketed in modern, urban supermarkets. Another 44 percent is retailed in stores exclusively offering poultry products. About 12 percent is sold in restaurants (mainly those specializing in broiler chicken). Six percent goes to industrial operations, and the rest is marketed as live birds in traditional open-air markets.

About 20 percent of the Colombia's *eggs* are sold to the consumer through urban supermarkets, some 53 percent through small general stores, ten percent through stores specialized in poultry products, ten percent through restaurants, and the rest as inputs for industrial food products.

Price recovering are underway for poultry meat after a down turn a year before. The average retail price of broilers in August 2000 was 3,500 pesos per kilogram (\$1.60/kg), up 6 percent from a year earlier.

Eggs were sold in July 2000 at the retail market at 2,390 pesos (\$1.10) per dozen, showing no change from a year before. Local industry anticipates that egg prices will increase in the last four months of 2000 if current upward trend continues as the economy recovers. Eggs remain one of the lowest cost forms of animal protein in Colombia and are within the reach of even the poorest consumers. Egg consumption is expected to increase over the next three years at an annual rate of about four percent.

Trade

1. Chicken meat Imports

Colombia allows imports of poultry products, only if they are further processed. A processed product is defined by the GOC as having been subjected to processing that resulted in a change in its internal structure. Further processed chicken products imported from the United States are primarily nuggets, frozen and breaded sticks, chicken hamburger mix, chicken fillet and mechanically deboned chicken (MDC).

Poultry meat imports grew significantly in the 1990's and peaked at 25,000 tons in 1997. But, due to the economic recession that Colombia experienced in 1998 and 1999, imported meat dropped significantly. By the end of 1999, signs of economic recovery pushed the growth in chicken meat imports to 5 percent for the year. Analysts expect that in year 2000 and 2001 growth in demand for chicken meat imports will remain steady at about percent 5 percent a year. The United States supplied 83 percent of all imports in 1999. Demand for chicken products, especially those from the United States is high in Colombia. U. S. poultry products are attractive to traders, because of their low price compared to the local product. Other suppliers of poultry meat to Colombia are Venezuela and Ecuador, as members of the Andean Community, and Chile, because of a bilateral agreement which allows them to export poultry meat to Colombia duty free. Depending on prices, sporadically these countries increase their share of the Colombian market.

U.S. mechanically deboned chicken made its appearance in the Colombian market in 1993 with 3,400 tons imported from the United States. Colombia imported 11,000 tons of MDC valued at \$6.6 million in 1999, with 92 percent sourced from the United States. MDC substitutes for higher-cost domestic poultry and pork used in the production of hot dogs and sausages. Meat processors point out that local production of MDC can meet only about ten percent of their requirements.

For the past 18 months, a *zero pathogen regulation* for meat, imposed by the Colombian Ministry of Health, has proved problematic for U.S. MDC imports. This regulation effectively requires that U.S. chicken products be completely free from *Salmonella*, a practical impossibility short of irradiation. With support from the Food Safety Inspection Service and FAS/Washington, post has put considerable pressure on the Ministry of Health to eliminate this regulation and work toward implementing the HACCP system in Colombia. Although it will be a slow process, the Ministry is, in fact, beginning to move in this direction. However, the zero pathogen regulation is yet to be rescinded.

The United States supplied Colombia with a total of 14,700 tons of poultry meat in 1999 in the form of further processed chicken, MDC and chicken parts, valued at \$11.3 million. Except for selected ports (San Andrés, Portete, Urabá), Colombia has not approved imports of poultry parts since 1994. Imports into these ports are intended for consumption only in the surrounding local areas. Nevertheless, most of the poultry meat entering through the Urabá port, reportedly, flows illegally into larger urban centers in Colombia. Also, chicken parts are a common product to be imported illegally as a form of money laundering

2. Egg Imports

Egg imports into Colombia in 2000 are estimated at 54 million eggs of which 14 million are dried and liquid eggs. About 70 percent of all egg imported in 1999 were for consumption, 27 percent dried and liquid eggs, and the remain hatching egg. Ecuador was the main supplier of eggs for

human consumption, because of its lower price. Besides legal imports, there is also a contraband market from Ecuador, which is estimated at above one million eggs per year.

Colombia imported 2 million (equivalent eggs) of dried egg yolk from United States and about 15 percent of imports of hatching egg of a total amount of 1.6 million eggs. However, hatching egg imports from the United States are expected to pick up in 2000, as the broiler eggs production is expected to continue growing.

3. Day-old Chick Imports

Day-old chick imports in 2000 are estimated to increase 35 percent to 700,000 birds valued after a sharp dropped of 47 percent in 1999. Another similar increment in chick imports is expected for year 2001. However, should be noticed that these increments will pull up imports just to levels observed in 1998. About 44 percent of all chick imports comes from the United States. Other important suppliers are Venezuela, Germany, and Chile.

Stocks

Poultry meat stocks are not expected to change much during 2000. End-of-year stocks are estimated at 25,000 tons, which represent 4 percent drop from 1999. Egg stocks at the end of 2000 are projected at 182 million units, down 7 percent from the beginning of the year. These figures are equivalent to approximately two weeks of meat and egg consumption.

Policy

1. Export Plant Certification

Colombia requires certification of each foreign meat processing plant that seeks to export to Colombia. Canada and the United States are exceptions to this rule. For these two countries, Ministry of Agriculture officials (Colombian Agricultural Institute, ICA) visit a sampling of plants and then authorize all plants operating under the host countries inspection system to export to Colombia (ICA resolution 2235/95). In the case of the United States, export approval is valid for two years. The current eligibility period expired on October, 1999; however this authorization has been extended indefinitely, while ICA implements a new system based on national certification.

2. Import Licensing and Duties

In the case of chicken meat, whole turkeys, and processed poultry meat, each importation must be approved by the Colombian Ministry of Agriculture, MOA (resolution 281/98), before an import license is granted by the Minister of Foreign Trade. Except for imports to selected Colombian ports (San Andres, Portete and Uraba), the MOA has routinely denied imports of U.S. chicken parts since 1994. Imports to these selected ports are intended to be used only in the area and should not be moved to other parts of Colombia. MOA approval is not required for chicken parts from the other Andean Community countries or Chile.

Whole chicken and mechanically deboned chicken imports from countries, other than those of the Andean Community, are assessed a 20 percent duty. Chicken parts are assessed the same basic duty but also are subject to a variable duty under the Andean Community's price band system. Currently, this additional variable duty plus the 20 percent basic duty brings the total tax on imports of chicken parts to 156 percent (\$988 per ton) of the reference price established by the GOC (please see below "3. Tariff and Non-tariff Barriers").

3. Tariff and Non-Tariff Barriers

Poultry and egg products imported into Colombia from Andean Community countries and Chile enter duty free. For all other countries, including the United States, the following basic duties are applicable: 20 percent for all types of fresh, chilled/frozen whole poultry, processed poultry meat, and table eggs; and five percent for hatching/vaccine preparation eggs.

Besides the basic duty, the Andean Community has a common *price band* system that determines import duties for certain agricultural products. For the current period of August 1-15, 2000, the price band for chicken parts has floor, ceiling and reference prices that stand at \$1,364, \$1,487 and \$640 per ton, respectively. This results in an import duty for chicken parts of 156 percent of the reference price or \$988 per ton.

Local poultry and pork producers continuously appeal to the GOC to implement measures which will restrict mechanically deboned chicken (MDC) imports. Additionally, poultry growers have requested the Ministry of Foreign Trade to place MDC under the Andean Community's price band system, which would take the import duty from 20 percent to the current level of 156 percent.

4. Pre-shipment Inspection Requirement

From July 1, 1999, the Colombian Government eliminated the inspection and certification of imported food products at the port of export, as part of an effort to ease import procedures.

5. Export Subsidies

To promote the export of non-traditional products, i.e., commodities other than coffee and petroleum, the GOC established in 1967 export subsidies called CERTs. Since 1992, egg exports have received a CERT equal to 4.5 percent of the fob export value. No other poultry product is granted a CERT. Exports to other Andean Community countries and Chile are not eligible to receive a CERT.

6. Domestic Product Absorption Requirement

At the end of 1999, the GOC ruled (resolution 587) establishing that for each ton of chicken meat to be imported, the importer must buy 95 tons of the same product in the domestic market, which applies through commercial year 2000.

Marketing

Market opportunities exist for U.S. whole *chicken* (broilers and hens), which generally retails at a price slightly below the Colombian product. Colombian consumers prefer the yellow skin color and larger size of American chickens. Should the MOA grant approval, and import licensing and duties were reduced, demand for U.S. chicken parts would increase markedly.

There is a small market (about 1,000 tons per year) for poultry meat on Colombia's Caribbean islands of San Andres and Providencia. Imports into these islands primarily service the hotel and restaurant trade in what is largely a tourist-based economy.

A small market in Colombia also exists for *consumer-ready meat products* made from chicken or turkey to be sold through supermarkets, specialty meat stores, and restaurants. The Colombian market for products, such as hot dogs, sausages, and turkey pastrami is expanding rapidly to upper-income groups.

Mechanically deboned chicken offers a significant sales potential for U.S. exporters. Local meat processors are dependent upon imports to supply approximately 90 percent of their requirements. This product is an important input into the production of hot dogs and sausages.

In contrast to chicken meat imports, there are no discretionary import license requirements for eggs. Marketing opportunities exist for hatching eggs; however, U.S. prices for consumption eggs are not competitive, according to importers.

Chicken and egg import activity is carried out by specialized brokers who purchase on behalf of their customers and charge a fee for their services. Import brokers supply local supermarket chains, as well as specialized poultry stores.

Import Requirements

1. Import Requirements for Poultry Meat (whole birds), not transformed

A transformed product is defined by the GOC as having been subjected to processing that resulted in a change in its internal structure.

1. The Ministry of Agriculture must approve chicken (or other poultry) imports. Whenever this Ministry determines that domestic supplies are sufficient to meet local demand and/or that imports of this product would economically damage local poultry industry, imports are not approved. Except for selected ports (San Andres, Portete, Uraba), the Ministry of Agriculture has not approved fresh chicken part imports since 1994.

The GOC, however, does approve imports of processed or prepared poultry parts. Duty treatment for these products is subject to the application of the Andean Community price band and reference price systems.

In 1998, the GOC ruled (resolution 281) that poultry meat import approval is subject to

domestic absorption policies. Importers must purchase a certain amount of locally produced poultry meat before they their import license is approved. Importers must buy 95 kilos of chicken meat or 2.6 kilos of turkey meat for each kilo of the same product to be imported; duck, goose meat and Cornish hen meat are not subject to the absorption requirement.

2. The importer purchases an import registration form at the Ministry of Foreign Trade (cost 21,500 pesos or about \$10).
3. The importer presents to ICA his completed import registration form and is issued a sanitary permit (cost 20,000 pesos or about \$9). This process normally takes about 48 hours.
4. The importer presents the completed import registration form, the ICA sanitary permit, and the Ministry of Agricultural approval to the Ministry of Foreign Trade. The Ministry of Foreign Trade will then issue an import registration approval. This process normally takes 48 hours. The imported meat product is inspected by an ICA veterinarian upon arrival in Colombia. The ICA official ensures that the product comes from U.S. inspected production facilities, is free of disease, has been inspected by USDA prior to its shipment, and is accompanied by a USDA health certificate.
5. If the meat is sold in retail packages, it must be labeled. Labels must be in Spanish and contain the product name, name and address of importer, name and address of producer, net contents in metric units, list of ingredients, Ministry of Health registration number, recommended method of storage, and product expiration date. This information may be provided by the application of a sticker to the package.
6. All meats are assessed a 20 percent import duty. Poultry meat is also subject to a variable duty under the price band system. Currently, the total import duty stand at 185 percent for poultry meat.

Note: Product registration with the Ministry of Health (INVIMA) is not required.

2. Poultry Parts (fresh, chilled or frozen)

1. The Ministry of Agriculture must approve chicken (or other poultry) part imports. Whenever this Ministry determines that domestic supplies are available to meet local demand and/or that imports of this product would economically damage local poultry industry, imports are not approved.

Except for selected ports (San Andres, Portete, Uraba), the Ministry of Agriculture has not approved fresh chicken part imports since 1994. Imports to these selected ports are intended to be consumed only in the area and should not be moved to other parts of Colombia.

The GOC, however, does approve imports of processed or prepared poultry parts.

3. Mechanically Deboned Chicken

1. The Colombian importer must register his company with the Ministry of Foreign Trade. This grants Government of Colombia authorization to the company to import all agricultural products.
2. The product must be registered with the National Institute for the Surveyance of Food and

Medicines (INVIMA). INVIMA registration requires: (1) a written document from the manufacturer certifying that it manufactures the product, and (2) a certificate of free sale stating that the products are approved for human consumption in the United States. This certificate needs to be issued by a U.S. Government (state, local or federal) health authority. Although not required, product approval is facilitated if a description of the manufacturing process and a list of the ingredients, including any additives, preservatives, and colorings are detailed.

All documents must be notarized by the Colombian Embassy or Consulate in the United States and by the Ministry of Foreign Affairs in Bogota. All documents must be translated into Spanish by a translator approved by the Ministry of Foreign Affairs. A sample label may be submitted. A registration fee must be paid. This fee covers the cost of preparing an analysis of the product. The analysis need not be done prior to registration approval. INVIMA registration charges depend on the item, but it is ranging from \$511 to \$882 per product. After all required documentation is submitted, product registration by INVIMA takes about three working days.

INVIMA registration is valid only for the applicant (exporter or importer) and the manufacturer specified in it. Whenever the U.S. exporter wants to change its Colombian importer, there are two possibilities:

(a) If the U.S. exporter is the applicant for INVIMA registration, he must submit an application for modification to INVIMA (cost 60,000 pesos or about \$28).

(b) If the Colombian importer is the applicant, the U.S. exporter must initiate a new registration process, specifying his new importer(s). Afterwards, he may change his importer(s) whenever he deems it advisable. The U.S. exporter must apply through his legal representative in Colombia or a lawyer.

3. The importer purchases an import registration form at the Ministry of Foreign Trade (cost 21,500 pesos or about \$10).
4. The importer presents the completed MOFT form to INVIMA for clearance. This process normally takes about 48 hours.
5. The importer presents the completed MOFT form and INVIMA clearance to ICA (cost 20,000 pesos or about \$9). ICA then issues a sanitary permit. This process normally takes about 48 hours.
6. The importer presents the completed MOFT form, INVIMA clearance and ICA sanitary permit to the Ministry of Foreign Trade. The Ministry of Foreign Trade will then issue an import license approval. This process normally takes about 48 hours.

Note: Processed meats are assessed a 20 percent import duty.

4. Poultry Meat - Transformed (fresh, chilled or frozen)

A transformed product is defined by the GOC as having been subjected to processing that resulted in a change in its internal structure. The Colombian importer must register his company with the Ministry of Foreign Trade. This grants Government of Colombia authorization to the company to

import all agricultural products. *The products under this HS codes are subject to the prior licensing approval by the MOFT.*

1. The product must be registered with INVIMA, the National Institute for the Surveyance of Food and Medicines. This registration can be done by either the exporter or the importer. INVIMA registration requires: (a) a written document from the manufacturer stating that they manufacture the listed products, and (b) a certificate of free sale stating that the products are approved for human consumption in the United States. This certificate needs to be issued by a U.S. Government (state, local or federal) health authority.

Although not required, INVIMA registration is facilitated if a description of the manufacturing process and a list of ingredients, including any additives, preservatives, and colorings is submitted.

All documents must be notarized by the Colombian Embassy or a Consulate in the United States and by the Ministry of Foreign Affairs in Bogota. These documents must be translated into Spanish by a translator approved by the Ministry of Foreign Affairs. A sample label also may be submitted. An INVIMA registration fee must be paid. This fee covers the cost of preparing an analysis of the product. The product does not need to be analyzed before registration approval is given. Costs depend on the item, but range from \$511 to \$882 per product. After all the required documentation is submitted, product registration by INVIMA takes about three working days.

INVIMA registration is valid only for the applicant (exporter or importer) and the manufacturer specified in it. Whenever the U.S. exporter wants to change its Colombian importer, there are two possibilities:

(a) If the U.S. exporter is the applicant for INVIMA registration, he must submit an application for modification to INVIMA (cost 60,000 pesos or about \$28).

(b) If the Colombian importer is the applicant, the U.S. exporter must initiate a new registration process, specifying his new importer(s). Afterwards, he may change his importer(s) whenever he deems it advisable. The U.S. exporter must apply through his legal representative in Colombia or a lawyer.

2. The importer purchases an import registration form at the Ministry of Foreign Trade (cost 21,500 pesos or about \$10).
3. The importer presents the completed MOFT form to INVIMA for clearance. This process normally takes about 48 hours.
4. The importer presents the completed MOFT form and INVIMA clearance to ICA (cost 20,000 pesos or about \$9). ICA then issues a sanitary permit. This process normally takes about 48 hours.
5. The importer presents the completed MOFT form, INVIMA clearance and ICA sanitary permit to the Ministry of Foreign Trade. The Ministry of Foreign Trade will then issue an import license approval. This process normally takes about 48 hours.
6. If the meat is sold in retail packages, it must be labeled. Labels must be in Spanish and

contain the product name, name and address of importer, name and address of producer, net contents in metric units, list of ingredients, Ministry of Health registration number, recommended method of storage, and product expiration date. This information may be provided by the application of a sticker to the package.

7. High value food products are assessed a 20 percent import duty.

Note: The Ministry of Agriculture must approve chicken, or other poultry, part imports. Whenever the Ministry determines that domestic supplies are available to meet local demand and/or that imports of this product would economically damage local poultry industry, imports are not approved. Imports of chicken parts which undergo minimal processing, such as those sprinkled with paprika, are not allowed.

Potential Importers

1. Poultry Product Producers and Processors

FENAVI

Federacion Nacional de Avicultores
(National Poultry Producers Association)
Carrera 33, No. 90-43
Bogotá, Colombia

Tel: (57-1) 621-3617
Fax: (57-1) 222-9304

Huevos Vigor

Apartado 149
Km. 1 Vía Aeropuerto
Ibagué, Colombia

Tel: (57-82) 67-7777
Fax: (57-82) 38-0444

COLOMBIANA DE INCUBACION

Calle 37, No. 14-46
Apartado 19357
Bogotá, Colombia

Tel: (57-1) 287-0100
Fax: (57-1) 287-7691

Incubadora Santander

Carrera 28, No. 53-58
Bucaramanga, Colombia

Tel: (57-7) 643-0036
Fax: (57-7) 647-9664

Pollo Olímpico

Calle 74, No. 63-65
Bogotá, Colombia

Tel: (57-1) 231-1633/230-4673
Fax: (57-1) 250-9578

Aretama, S.A.

Carrera 69, No. 16-70
Bogotá, Colombia

Tel: (57-1) 292-1999
Fax: (57-1) 292-6555

Huevos Oro, Ltda.

Calle 153, No. 102-84
Apartado 24116
Bogotá, Colombia

Tel: (57-1) 405-0101
Fax: (57-1) 681-5841

Pavos La Paz

Carrera 13, No. 73-68
Bogotá, Colombia

Tel: (57-1) 211-7620
Fax: (57-1-) 613-1772

DISTRACO

Calle 12A, No. 44-34
Bogotá, Colombia

Tel: (57-1) 268-5700
Fax: (57-1) 268-8385

Pollos Campeón

Apartado 6751
Bogotá, Colombia

Tel: (57-1) 247-6498
Fax: (57-1) 237-9055, X 216

Avidesa, McPollo

Km. 7, Autopista Florida
Bucaramanga, Colombia

Tel: (57-7) 638-0144/638-7187

Fax: (57-7) 638-8588

DISTRAVES

Carrera 29, No. 45-94, Oficina 404
Apartado 442
Bucaramanga, Colombia

Tel: (57-7) 643-0994

Fax: (57-7) 643-5567

Email: prdistra@col3.telecom.com.co

AVICAMPO

Calle 51, No. 25-22
Bogotá, Colombia

Tel: (57-1) 248-3205

Fax: (57-1) ??

Pollos El Cacique

Calle 17, No. 32-28
Bogotá, Colombia

Tel: (57-1) 277-2800

Fax: (57-1) 237-7305

ABOSAN

Calle 22, No. 10-37
Bucaramanga, Colombia

Tel: (57-7) 642-7569

Fax: (57-7) 671-1219

Avicola El Guamito

Km. 3 Vía Palenque Café Madrid
(al lado del Parque Industrial)
Bucaramanga, Colombia

Tel: (57-7) 676-1860

Fax: (57-7) 676-1551

2. Poultry Meat Processors and Importers**ZENU**

Cra 64 No 104-03
Medellín, Colombia

Tel: (57-4) 267-2501

Fax: (57-4) 267-4170

Aretama

Calle 17, No. 68D-87
Bogotá, Colombia

Tel: (57-1) 292-1066

Fax: (57-1) 292-6555

TECNIAGRO

Calle 25A Sur, No. 48-150
Avenida Las Vegas
Medellín, Colombia

Tel: (57-4) 332-1133

Fax: (57-4) 270-4904

DISTRAVES

Carrera 29, No. 45-94, Oficina 404
Apartado 442
Bucaramanga, Colombia

Tel: (57-7) 643-0994

Fax: (57-7) 643-5567

Email: prdistra@col3.telecom.com.co

Acondesa (Mercapollo)

Carrera Vieja Soledad; Autopista Aeropuerto
Barranquilla, Colombia

Tel: (57-5) 342-3455

Fax: (57-5) 342-3167

Ricapresa

Calle 104, No. 1-10
Copacabana
Apartado 56-902
Medellín, Colombia

Tel: (57-4) 274-5454/278-3333

Fax: (57-4) 274-5454

Distraco

Calle 98, No. 17A-68
Bogotá, Colombia

Tel: (57-1) 268-5700

Fax: (57-1) 268-8385

RicaRondo

Calle 31, No. 2-80
Apartado 4842
Cali, Colombia

Tel: (57-2) 442-2637

Fax: (57-2) 444-5969

Koyomad, S.A.

Transversal 18, No. 78-67, L-48
Bogotá, Colombia

Tel: (57-1) 368-4499

Fax: (57-1) 368-4604

C.I. Frigoríficos Mar Azul, Ltda.

Carrera 50, No. 32-144
Medellín, Colombia

Tel: (57-4) 262-4614

Fax: (57-4) 232-1435

Puropollo

Autopista Nuevo Aeropuerto
Barranquilla, Colombia

Tel: (57-5) 342-4416

Fax: (57-5) 342-4267

Pollos El Príncipe, Ltda.

Carrera 68D, No. 11-62
Apartado 34-231
Bogotá, Colombia

Tel: (57-1) 262-6081

Fax: (57-1) 290-1705

Interconsult Trading, Ltda.

Calle 108, No. 9A-14
Bogotá, Colombia

Tel: (57-1) 619-2134

Fax: (57-1) 619-2135

Abasto Cárnico de Colombia, Ltda.

Carrera 86, No. 32A-51
Bogotá, Colombia

Tel: (57-1) 413-2282

Fax: (57-1) 413-2282

McKey Colombia, S.A.

Carrera 128, No. 32-75, Bodega 24
Bogotá, Colombia

Tel: (57-1) 413-4047/413-4057

Fax: (57-1) 413-3914

**Distribuidora de Pescados y
Mariscos de la Sabana, Ltda.**

Carrera 45A, No. 80-80/56
Bogotá, Colombia

Tel: (57-1) 630-0011

Fax: (57-1) 630-1154

Institutional Food Services

Carrera 7, No. 180-75
Módulo 3 Codabas
Bogotá, Colombia

Tel: (57-1) 677-4040
Fax: (57-1) 674-9290

Distribuciones Corín, Ltda.

Transversal 24, No. 21D-61, Alto Bosque
Cartagena, Colombia

Tel: (57-5) 662-3340/624-6074
Fax: (57-5) 662-3342

Tables

Colombia: Poultry Meat, Total - Production, Supply and Demand, 1999-2001

(1,000 tons and 1,000 head)

PSD Table						
Country:	Colombia					
Commodity:	Poultry, Meat, Total					
		1999		2000		2001
	Old	New	Old	New	Old	New
Calendar Year Begin		01/1999		01/2000		01/2001
Inventory (Reference)	69	69	70	64	0	66
Slaughter (Reference)	363	339	388	360	0	370
Beginning Stocks	24	24	26	26	30	25
Production	678	638	706	670	0	695
Whole, Imports	8	3	9	4	0	5
Parts, Imports	9	15	10	15	0	15
Intra EC Imports	0	0	0	0	0	0
Other Imports	0	0	0	0	0	0
TOTAL Imports	17	18	19	19	0	20
TOTAL SUPPLY	719	680	751	715	30	740
Whole, Exports	0	0	0	0	0	0
Parts, Exports	0	0	0	0	0	0
Intra EC Exports	0	0	0	0	0	0
Other Exports	0	0	0	0	0	0
TOTAL Exports	0	0	0	0	0	0
Human Consumption	693	654	721	690	0	719
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	693	654	721	690	0	719
TOTAL Use	693	654	721	690	0	719
Ending Stocks	26	26	30	25	30	21
TOTAL DISTRIBUTION	719	680	751	715	30	740
Calendar Yr. Imp. from U.S.	0	15	7	16	0	16

Estimate: 2000.

Forecast: 2001.

Source: DANE (National Statistics Bureau), FENAVI (Colombia Poultry Growers Association), and Avicultura Empresarial.

Colombia: Poultry Meat, Chicken-16 wks - Production, Supply and Demand, 1999-2001
(1,000 tons and 1,000 head)

PSD Table						
Country:	Colombia					
Commodity:	Plty, Meat, Chicken -16 wks					
		1999		2000		2001
	Old	New	Old	New	Old	New
Calendar Year Begin		01/1999		01/2000		01/2001
Inventory (Reference)	36	36	36	33	0	34
Slaughter (Reference)	360	336	386	358	0	368
Beginning Stocks	22	22	21	21	22	18
Production	613	577	638	606	0	628
Whole, Imports	8	3	9	4	0	5
Parts, Imports	9	15	10	15	0	15
Intra EC Imports	0	0	0	0	0	0
Other Imports	0	0	0	0	0	0
TOTAL Imports	17	18	19	19	0	20
TOTAL SUPPLY	652	617	678	646	22	666
Whole, Exports	0	0	0	0	0	0
Parts, Exports	0	0	0	0	0	0
Intra EC Exports	0	0	0	0	0	0
Other Exports	0	0	0	0	0	0
TOTAL Exports	0	0	0	0	0	0
Human Consumption	631	596	656	628	0	654
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	631	596	656	628	0	654
TOTAL Use	631	596	656	628	0	654
Ending Stocks	21	21	22	18	22	12
TOTAL DISTRIBUTION	652	617	678	646	22	666
Calendar Yr. Imp. from U.S.	12	15	13	16	0	16

Estimate: 1999.

Forecast: 2000.

Source: DANE (National Statistics Bureau), FENAVI (Colombia Poultry Growers Association), and Avicultura Empresarial.

Colombia: Imports of Poultry Meat, Total, 2000 (Tons)

Import Trade Matrix			
Country:	Colombia	Units:	Tons
Commodity:	Poultry, Meat, Total		
Time period:	1999		
Imports for	0		2000
U.S.	14721	U.S.	
Others		Others	
Ecuador	2669		
Canada	729		
Chile	154		
Venezuela	86		
Brazil	62		
Total for Others	3700		0
Others not listed	46		
Grand Total	18467		0

Source: DIAN (Revenue and Customs Agency).

Colombia: Prices of Poultry Meat at the Retail Market, 1999-2000 (Pesos per kilogram)

Prices Table					
Country:	Colombia				
Commodity:	Poultry, Meat, Total				
Year:	2000				
Prices in (currency)	pesos	per (uom)	kilo		
Year	1999	2000	% Change		
Jan	3500	3000	-14.3%		
Feb	3300	3200	-3.0%		
Mar	3100	3000	-3.2%		
Apr	3000	3300	10.0%		
May	2900	3500	20.7%		
Jun	3000	3300	10.0%		
Jul	3300	3500	6.1%		
Aug	3300	3500	6.1%		
Sep	3100		-100.0%		
Oct	2900		-100.0%		
Nov	3150		-100.0%		
Dec	3250		-100.0%		

Source: Surveys by the Agricultural Attaché's Office.

Colombia: Poultry, Eggs - Production, Supply and Demand, 1999-2001

(Million eggs and million hens)

PSD Table						
Country:	Colombia					
Commodity:	Poultry, Eggs					
		1999		2000		2001
	Old	New	Old	New	Old	New
Calendar Year Begin		01/1999		01/2000		01/2001
Layers	28	29	28	30	0	30
Beginning Stocks	203	203	265	191	330	182
Production	8335	8256	8668	8380	0	8631
Hatch Eggs, Imports	23	2	24	4	0	5
Shell Eggs, Imports	15	34	15	36	0	36
Other Imports	0	13	0	14	0	15
Intra EC Imports	0	0	0	0	0	0
TOTAL Imports	38	49	39	54	0	56
TOTAL SUPPLY	8576	8508	8972	8625	330	8869
Hatch Eggs, Exports	13	11	14	14	0	15
Shell Eggs, Exports	1	9	0	11	0	11
Other Exports	0	0	0	0	0	0
Intra EC Exports	0	0	0	0	0	0
TOTAL Exports	14	20	14	25	0	26
Hatch Eggs, Consumption	367	367	368	377	0	388
Shell Eggs, Human	7850	7850	8180	7961	0	8217
Shell Eggs, OT. Use/Loss	80	80	80	80	0	75
Other Dom. Consumption	0	0	0	0	0	0
Total Dom. Consumption	8297	8297	8628	8418	0	8680
TOTAL Use	8311	8317	8642	8443	0	8706
Ending Stocks	265	191	330	182	330	163
TOTAL DISTRIBUTION	8576	8508	8972	8625	330	8869
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0

Estimate: 1999.

Forecast: 2000.

Source: DANE (National Statistics Bureau), FENAVI (Colombia Poultry Growers Association), and Avicultura Empresarial.

Colombia: Exports of Poultry, Eggs, 1999 (Million eggs)

Export Trade Matrix			
Country:		Units:	Million eggs
Commodity:			
Time period:	01/1999		
Exports for	1999		2000
U.S.		U.S.	
Others		Others	
Venezuela	20		
Total for Others	20		0
Others not listed			
Grand Total	20		0

Source: DANE (National Statistics Bureau).

Colombia: Imports of Poultry, Eggs, 1999 (Million eggs)

Import Trade Matrix			
Country:	Colombia	Units:	million eggs
Commodity:	Poultry Eggs		
Time period:	01/1999		
Imports for	1999		2000
U.S.	2	U.S.	
Others		Others	
Ecuador	34		
India	9		
Belgium	2		
Brazil	1		
Chile	1		
Total for Others	47		0
Others not listed	0		
Grand Total	49		0

Source: DIAN (Revenue and Customs Agency).

Colombia: Prices of Poultry Eggs at the Retail Market, 1999-2000 (Pesos per dozen)

Prices Table					
Country:	Colombia				
Commodity:	Poultry Eggs				
Year:	2000				
Prices in (currency)	pesos	per (uom)	dozen		
Year	1999	2000	% Change		
Jan	2420	2470	2.1%		
Feb	2430	2250	-7.4%		
Mar	2440	2460	0.8%		
Apr	2450	2550	4.1%		
May	2460	2460	0.0%		
Jun	2470	2400	-2.8%		
Jul	2390	2390	0.0%		
Aug	2310		-100.0%		
Sep	2260		-100.0%		
Oct	2300		-100.0%		
Nov	2400		-100.0%		
Dec	2470		-100.0%		

Source: Surveys by the Agricultural Attaché's Office.