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## Colombia

### Product Brief

### Bakery and Pastry Pre-Mixes Study

2004

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**Report Highlights:**

The market for bakery pre-mixes has grown and is expected to continue growing due to the large effort of distributors to change production habits and to simplify and standardize baking methods utilizing pre-mixes.

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**TABLE OF CONTENTS**

- I. EXECUTIVE SUMMARY
- II. MARKET OVERVIEW
- III. MARKET SECTOR OPPORTUNITIES AND THREATS
- IV. ENTRY STRATEGY
- V. MARKET SIZE TRENDS
- VI. IMPORTS
- VII. LOCAL PRODUCTION
- VIII. DISTRIBUTION CHANNELS
- IX. USERS OF PREMIXES
- X. COSTS AND PRICES
- XI. OTHER PROSPECTIVE PRODUCTS
- XII. MARKET ACCESS
- XIII. KEY CONTACTS

## I. EXECUTIVE SUMMARY

The bakery premix market has grown and is expected to have continued growth due to the large effort by distributors to change production habits and to implement simpler and standardized baking methods utilizing premixes. However, the master baker, who culturally sees baking as an art of mixing flour and water rather than a multiple variable industry, has slowed the growth of this market.

Small neighborhood bakeries make up a large part of the bread market in Colombia. Although they are barely beginning to know and use premixes, they have always been inhibited by the high cost.

Fedemol (National Federation of Wheat Mills) and the Fundacion Carvajal (a large Colombian foundation dedicated to the development of small industry) together have developed a program for the industrialized mass production of bread that has stimulated a large growth in this market sector.

Additionally, certain events in the market have increased quality standards and the diversity of products, such as:

The purchase of Disa by Unilever

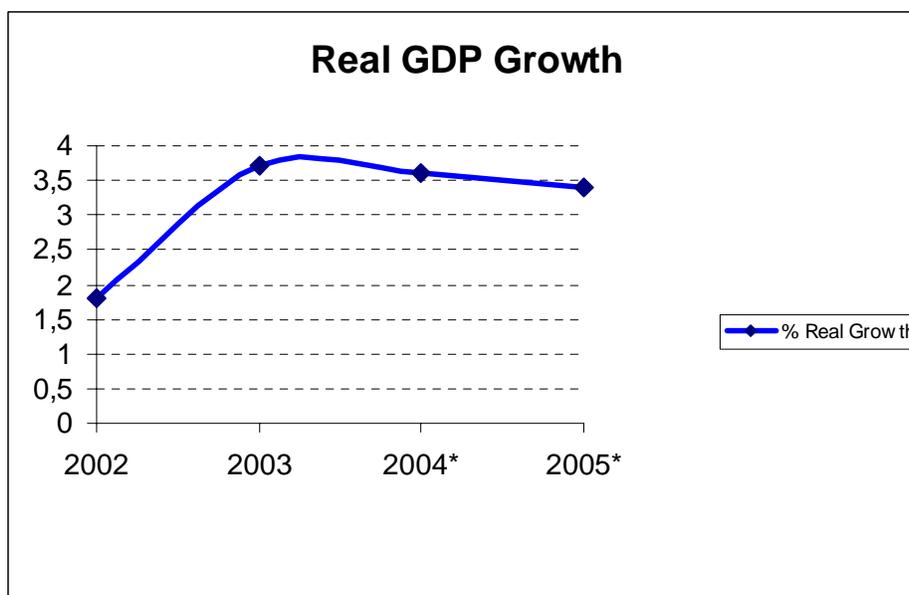
The entrance of Bimbo into the Colombian market

The growth of the hypermarket chain Carrefour

With the purchase of Disa by Unilever, their distributor channels have been strengthened by an enlarged market share. Pan Bimbo, a large Mexican bread producer, has entered into the Colombian market through a joint venture with the entrepreneurial group from the State of Antioquia (locally known as Sindicato Antioqueño), bringing high quality standards and new technologies into the sector.

The Carrefour hypermarket has 8 outlets in different cities each with a large bakery that offers wide variety of bakery and pastry. This fact has strengthened the Colombian bakery industry by introducing more competition. The supermarket bakeries are taking advantage of all the technical resources available and are stimulating market expansion. Other large supermarkets are introducing bread and pastry production in their offers to consumers.

During the year 2002, the total premix market grew 0.61% vs. 2001. The market maintained an upward growth rate of 7% amounting to U.S.\$44 million dollars in 2003. In 2004, it is projected at 3.6% and in 2005 growth should ascend to 3.4%. These figures are based on estimates of the prospective growth of the GNP in the agricultural and commercial sector.



Source: (1) Banco de la Republica (Central Bank), unless otherwise stated.  
 (2) National Department of statistics (DANE)

Premix imports during the years 2000 and 2001 grew 55% saturating the market, which caused a fall of 1.16% in 2002. Due to the continuous efforts by industry distributors, the favorable change of habits and the acceptance of big industry, good prospects for premix imports for bakery and pastry processes are expected. The negative growth trend reversed in 2003 with a growth rate of 20% climbing to U.S. \$13 million dollars and is expected to grow to U.S. \$14 million dollars in 2005.

## II. MARKET OVERVIEW

In Colombia the total market for premixes used in bakery and pastry processes during the period 2000 – 2001 grew 7.8% increasing from U.S. \$37.79 millions dollars in 2000 to U.S. \$40.77 millions in 2001 and U.S. \$41.03 million in 2002, increasing only 0.61% due to the slow growth of the economy. This growth originated mainly from the successful campaign implemented by the National Federation of Wheat Mills (Fedemol) with the implementation of premixes in the bread industry, enabling them to compete with the quality of Bimbo bread.

In this sector, imports grew 55%, from U.S. \$7.18 million dollars in the year 2000 to U.S. \$11.16 in 2001 but fell around 1.16% in 2002 to U.S. \$11 million. The reason for this decline is that some importers opted to discontinue brands, as in the case of Fleishman, which stopped importing some Caravan products.

Keeping in mind the official GNP estimates by Banco de la Republica (Central Bank), we expect that during 2004 – 2005 this market will maintain moderate growth, 3.6% and 3.4% respectively, growing to a market size of U.S. \$47 million in the year 2005.

Premix imports could end up growing 3% on average, increasing from U.S. \$11.03 million in 2002 to U.S. \$14.21 million in 2005.

The Advantage-Challenge analysis of the strengths, weaknesses, opportunities and threats, of imports from the US vs. those from other countries, can be summarized as follows:

- Lower dollar value versus the Euro has given the U.S. better prices over those of European importers.
- Less time and cost of transportation between the U.S. and Colombia, vs. Europe
- Consumers perceive US products having high quality standards and leading technology.
- US products are reliable and are generally perceived as prestige brands.
- Once the order is established, they fulfill their delivery times.

### Challenges and Opportunities

The bilateral free trade agreement currently under negotiation will put the United States on equal conditions versus other countries with which Colombia has bilateral trade agreements, such as Mexico and Chile.

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Possibility to have a representative in the country that will offer the Colombian bakery industry local inventories and direct contact.

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Possibility to come to the country, or send technicians that will provide technical assistance, run tests within the industry and share developments (an advantage that the European suppliers do not have.).

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Prices will be more stable, on a year basis, and not subjected to continuous fluctuations of the dollar.

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Contribution to the baking mass production industry allowing for growth in this sector.

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Possibility to develop the ultra frozen dough market that would allow the sale of fresh hot bread in the small bakeries and neighborhood supermarkets, avoiding the need of skilled personnel in the bakery. Involvement of the financial sector with this market (Banco Caja Social) to finance refrigerators, warmers and ovens.

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After September 11, U.S. customs requirements have become more difficult, especially in some ports where transportation occurs increasing the cost of the products.

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Products from the USA have the image of being standardized products, not flexible, and not adaptable to the Colombian market. This is a reason why the U.S. producers should be willing to condition their premixes for use in different Colombian cities, climates and altitudes that vary in oxygen levels.

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Premixes with a small quantity of flour are preferred instead of the available premixes that contain a high percentage of wheat flour.

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The Colombian milling industry will begin to compete with cake, pancake and brownie premixes aimed to households and massive market.

The strengths of the premixes are based on timesaving and making baking easier; are not attractive options to local bakers.

### III. MARKET SECTOR OPPORTUNITIES AND THREATS

#### Market Sectors and their Prospects for Bakery Premixes

##### Mills

The milling industry has a great tradition in Colombia; there are 41 wheat mills, located in the cities of Barranquilla, Cartagena, Medellín, Bucaramanga, Bogotá, Pereira, Tulua, Cali, Buga, Pasto and Popayan. The leading mills are: Harinera del Valle, Solarte Organization (5 mills), Molinos El Lobo, Rafael del Castillo & Co. (Molino Tres Castillos) and Molino Santa Marta.

Premix demand by the milling industry has mainly increased, among other factors, because of Decree 1944 of October 28 of 1996. The government of Colombia established that the flour sold in the country, whether imported or locally produced, must be fortified with vitamin B1 or thiamin, vitamin B2 or riboflavin, niacin, folic acid or iron folate. These nutrients should be added as a premix to the flour in the following quantities:

MICRO NUTRIENTS	MINIMUM QUANTITY	CHEMICAL MAKEUP
Vitamin B1 or Thiamin	6 mg	Thiamin Mononitrate
Vitamin B2 or Riboflavin	4 mg	Riboflavin
Niacin	55 mg	Nicotinamide
Folic acid	1,54 mg	Folic acid
Iron	44 mg	Ferrous Fumarate Reduced Iron Ferrous Sulfate
Calcium (optional)	1.280 mg	Calcium Carbonate

Source: Decree 1944 by Ministry of Health, Article.4.

##### Bakery Industry

There are around 4,000 registered bakers in Colombia including large multinational industries and Colombian companies, but they only amount to 7% of the bakery industry. This is the reason why the great majority is composed of medium and small bakeries, scattered in different neighborhoods throughout cities and towns.

##### There are three segments of the Industry:

1. Industrial bakeries
2. Medium and small bakeries and confectioners.
3. Distributors or hypermarkets

The industrial bakeries include multinationals such as Bimbo (Mexico), La Rosa (Nestle) and Colombian industries such as Noel, Comapan, Santa Clara, etc. These industries are aimed to the market segment in the large cities, offering specialty breads with great durability and freshness. In this segment of the market exists demand for premixes and bread enhancers, but they require technical support while running product tests and/or developing new market options, to satisfy consumer preferences.

The medium and small bakeries represent 93% of this sector, responding to the habits and traditions of most Colombians who are used to buy fresh, hot bread every morning. Family-run bakeries are located in the different residential neighborhoods. SENA, government vocational school, has accomplished a great job in providing trained bakers to the small family business that has resulted in a wide supply of bread and pastry products to consumers. Fedemol and the Fundacion Carvajal developed a training program for this segment of the market in 2001. Industrias del Maiz, Levapan and the Team Group offered free training to small bakers to improve the quality, durability and production volumes. All these efforts have resulted in an increased demand for premixes and bread enhancers by small bakers.

### **Retail Food Sector**

Big hypermarkets and supermarkets such as Carrefour, Carulla, Cafam, and Olimpica have entered into this market sector. They usually have central plants in each city dispatching frozen dough to their sales points, that operate only refrigerators and ovens, allowing them to offer hot, fresh baked bread, pastries and newly decorated cakes. They also provide finished products to cafeterias, fast food restaurants and institutions (universities, hospitals, hotels, etc.).

The demand of premixes for cakes, pancakes and brownies by hyper and supermarkets has also grown. Quaker, Pillsbury and Betty Crocker of General Mills are marketing premixes in Colombia. General Mills has recently replaced its local representative with La Campiña, that offers the advantages of a well developed refrigerated food network. This change has resulted in a wider offer of General Mills products in the local market. By this token, domestic milling companies, such as Harinera del Valle, have developed premixes for pancakes, cakes, and brownies sold under their own brands.

## **IV. ENTRY STRATEGY**

There is a large demand for the following premix types by the baking industry and hypermarkets/supermarkets:

### **Flour with vitamin premixes**

The National Federation of Wheat Millers (Fedemol) has pointed out the need to import mixes with a low percentage of flour and a high concentration of micro components, as listed in decree 1944, in order comply with the regulation the micro components added to flour milled in the country.

Total wheat milled in Colombia in 2002 was 1,037,796 tons of which 16,400 tons were nationally produced and 1,021,396 tons were imported. Wheat rather than flour is imported from the U.S.A., Canada, and Argentina in order to be assessed lower tariffs. Local millers have to add vitamins to flour in order to comply with decree 1944 of October 28, 1996. U.S. exporters should take advantage of supplying the appropriate pre-mixes to Colombian millers.

## Bread enhancers

Bread enhancers made up of balanced substances will allow the industrial baker to obtain consistent quality in their products. The use of potassium bromate is prohibited in Colombia because it is considered carcinogenic (Resolution 1528 of November 19, 2002). This product used to be widely used as a gluten enhancer. Bakers are looking for new alternative products.

### Premixes that improve bread physical-chemical and organoleptic characteristics

These products are marketed mainly for soft breads to avoid bread compression and good expansion while maintaining freshness. The following are enhancer categories:

- **Emulsifiers:** A mix of oil and water that provide better freshness because the humidity is retained in the crumb.
  - \*Monodiglycerides
  - \*SSL Sterile Sodium Lactolatum
  - \*CSL Sterile Calcium Lactolatum
- **Antioxidants:** Cabonamide Acid.
- **Dehumidifier**
- **Milling additives:** Alpha-amylase, Beta-amylase, ADA (Asodicarbonamide)
- **Enzymes:** Emicelullase, Glycosilanas, Lipase Cellulase, complete enzymes
- **Gluten:** Functional Protein

The main demand for bread enhancers come from the baking industry. Compared to Pan Bimbo in Colombia, small bakers have been at disadvantage because they lack bread enhancers that guarantees dough freshness and consistency of bread crumb. Additionally, consumers have favored industrialized bread (such as the one produced by "Bimbo") because of its high quality, excellent product performance and longer shelf life.

Wheat flour marketed in Colombia is consumed in bakeries and pastry shops (67%), pasta (15%), cookies and crackers (11%) and household consumption (7%). New importers of enhanced bread premixes can break into the market through wholesalers like Lloreda Distributions or Makro that compete with Levapan and the Team Group.

### Premix bases for different types of breads: Cereals, Rye, French bread, Crust shine, Bagels, Croissants, Muffins, Doughnuts, and Cakes.

The per capita consumption of bread is very low in Colombia, 20.3 kilograms per year (source: Fedemol), since Colombians only consume bread at breakfast time and sporadically at others moments of the day. However, low bread consumption offers a market opportunity by stimulating consumers to create new habits for different bread varieties with all meals.

The entry of Carrefour supermarket, offering a variety of bread and pastry, has been well accepted by consumers and has stimulated other supermarket chains, medium and small bakeries to follow suit by enlarging their products supply. Equally, local medium bakeries with multiple outlets, such as Pan P´a Ya, have begun to use premixes in order to preserve their market share while achieving product diversification. However, the high costs of premixes have been a great deterrent to their development. Therefore, the introduction of a new premix should rely on marketing strategies to offer a good product at competitive prices.

**Modified Starch:**

The development of starches and modified starches have grown quickly in the Colombian market. Del Maiz company has been a leader with premixes for the preparation of typical Colombian products, such as buñuelos, cassava bread, cheese bread, and almojábanas. With the support of their subsidiaries Levapan and T Vapan 500 for the distribution and commercialization of these products, Del Maiz has developed training and associated strategies focused on small businessmen. Through this approach, the small businesses have obtained higher yields and larger profit margins that favor their growth. Successful examples are: Pan de Bono Valluno and Obleas José A.

**Ultra frozen dough premixes for the elaboration of bread or pre-formed bread.**

Supermarkets with multiple sale points, such as Carulla, Cafam, Olimpica, Exito, and the industrial bakery chains like Pan P'a Ya have developed the market for ultra frozen dough. They are able to supply their sale outlets with fresh baked bread by using a minimum of infrastructure and without needing expert bakers at each place. However, high cold storage costs are deterrents for the use of this technology. Keep in mind that most of Colombian consumers buy bread daily from the corner bakery or shops near home. The shops are usually supplied with fresh bread from the medium sized bakeries. Besides the small neighborhood bakeries, there are about 350,000 shops that sell fresh bread daily. Apparently, there is an opportunity to market frozen dough among shopkeepers by giving them the ability to supply consumers with recently baked products. This market has been successful in Central America.

**Types of premixes for glazes, shines, chocolate coverings, non-lactate creams, transparent coverings, pastry fillings.**

Carrefour, offering a wide variety of pastry products, has had an excellent consumer acceptance and has stimulated other supermarkets to also develop their pastry shops. Simultaneously, the development of independent pastry shops of excellent quality such as Cascabel and Myriam Camhi in Bogotá, Santa Helena in Medellín, and La Pastelería Americana in Barranquilla are examples of new actors in the market.

**Premixes for the preparation of cakes, pancakes, and brownies.**

These premixes are directed to the household use and can be found at the retail outlets. Another interesting opportunity, offered by the economic situation that the country has undergone, is that of optimizing production processes and lowering production costs creating a long term economical benefit that has impacted the Bakery and Pastry shop finished product market. With the purpose of obtaining more at a lower price, there is a way to market bread by selling it by weight, a method that has already been implemented in some super and hypermarkets. This trend is supported by government regulation. Through the Colombian Technical Norms (NTC) it forces the merchant to print on the sales label the weight and cost per gram along with basic nutritional information.

Strategic alliances with big distributor chains could facilitate market penetration. Like: Distribuidora La Liebre, (Lloreda Grasas distribution network who provide margarine to the bakeries), Corona (Nacional de Chocolates distributor, who distribute their chocolate icing to the bakeries and pastry shops), Grasco, who provide margarine and oils to bakeries and shops, or the hyper market Makro.

It seems like there is a need in the market to have more suppliers and a better understanding of modified starches that conserves the humidity, improves the crumb composition and increases the volume. Teaching technical training courses by master bakers, who would teach how the product works and its benefits, are strategies that would facilitate the introduction of new brands into the market.

The majority of cream mixtures don't fulfill the desired characteristics, they denaturalize quickly due to their oxidation, and confectioners require long life creams, without sacrificing texture or flavor.

**V. MARKET SIZE TRENDS**

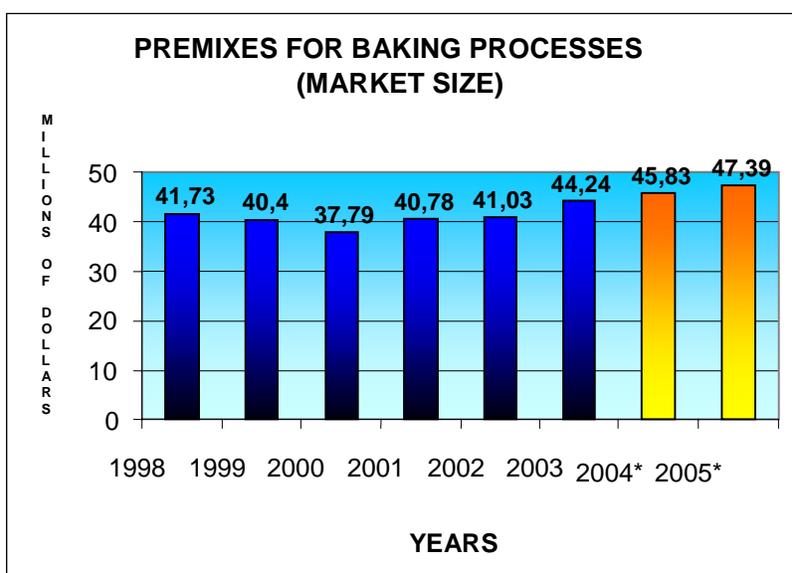
In comparison with other sectors, the economic recession (beginning in 1997) has had little effect on this market sector because bread is a basic component of the Colombian diet, especially in the urban areas. The total market increased from U.S.\$ 41 million in 2002 to U.S.\$ 44 million in 2003. A growth of 3.6% is expected for 2004 and 3% is projected for the year 2005.

**MARKET SIZE**

Description	MILLIONS OF DOLLARS							
	1998	1999	2000	2001	2002	2003	2004*	2005*
PREMIXES FOR BAKING PROCESSES	41.72	40.40	37.79	40.77	41.03	44.24	45.83	47.39

\* Estimate

Source: a. World Trade Atlas; b. DANE, Government of Colombia's Statistics Agency; c. Banco de la Republica (Central Bank).



**VI. IMPORTS**

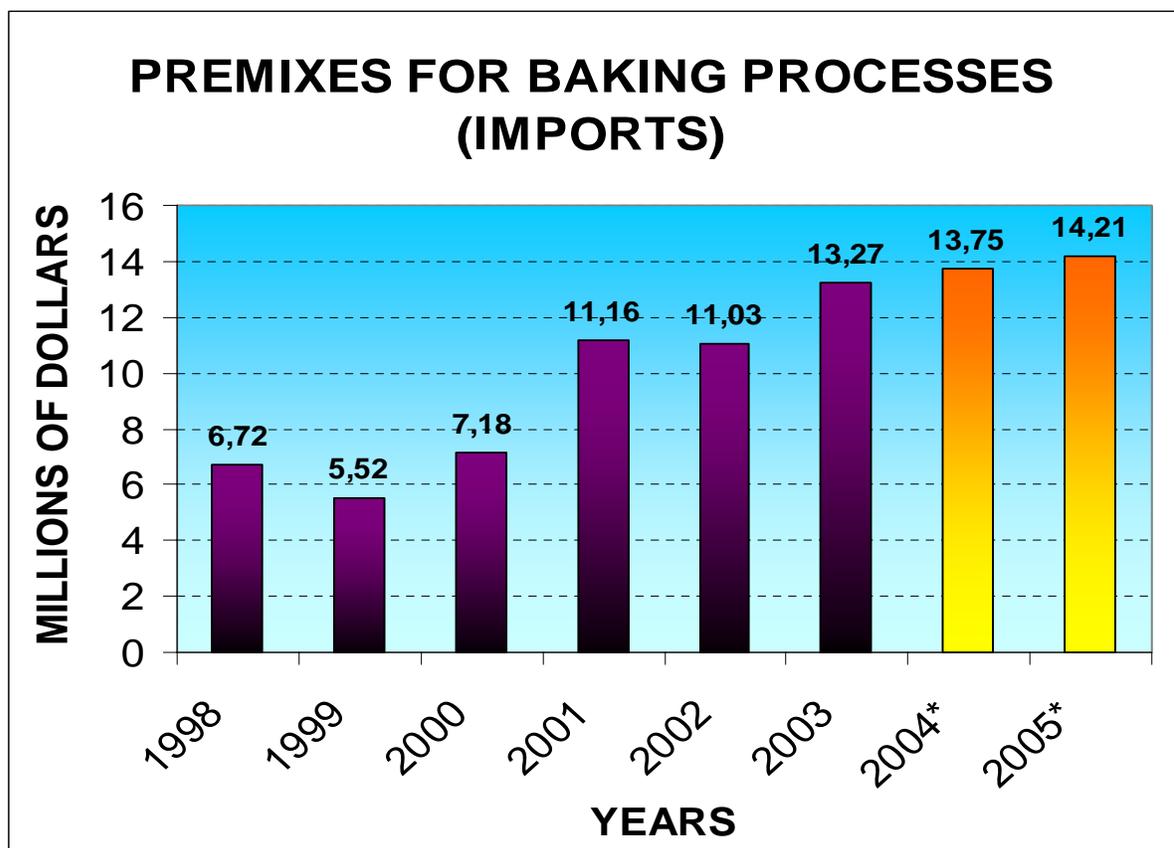
Premix imports during the year 2002 amounted to \$11.03 million dollars, a 1.16% decline with respect to 2001. There was significant growth of 20% in 2003. This market will maintain a moderate 3% average annual growth rate during the period 2004 – 2005 to reach \$ 14 million by 2005. Imports from the U.S. were \$7.68 million in 2003, a 4.2% reduction from 2002.

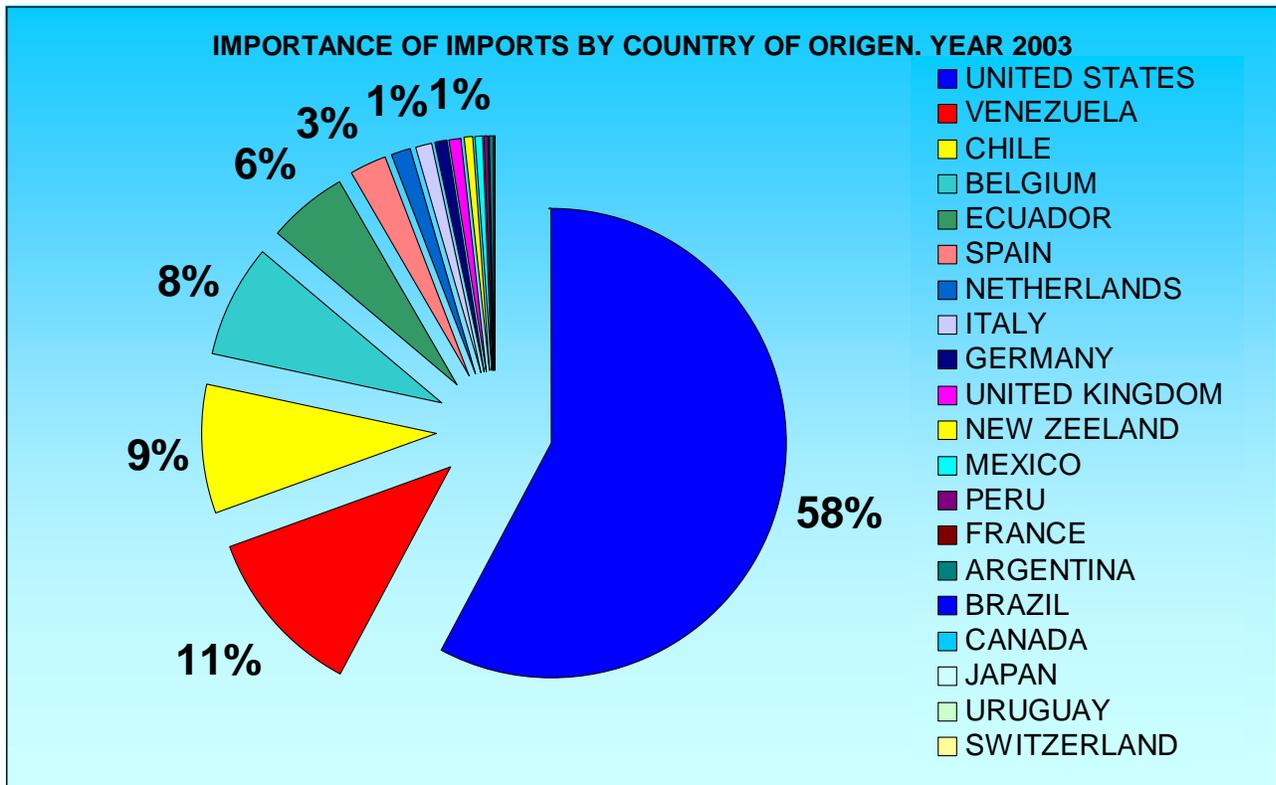
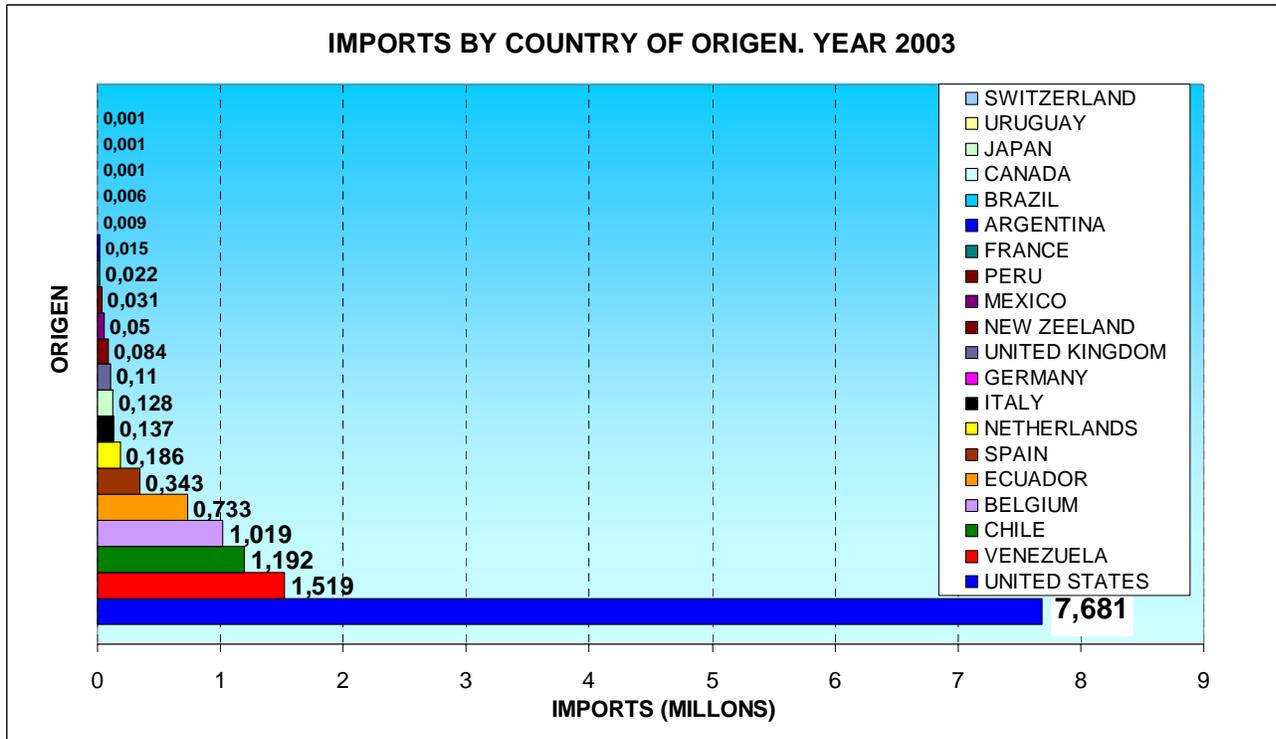
Besides the United States, premix imports originate in Venezuela, Chile, Belgium, Ecuador and Spain. Some of these countries enjoy import tariff advantages because of bilateral trade agreements. An up coming bilateral free trade agreement with the U.S. would put U.S. exports in a competitive position.

**IMPORTS**

		MILLIONS DOLLARS							
Description	1998	1999	2000	2001	2002	2003	2004*	2005*	
BAKING PREMIXES	6.72	5.52	7.18	11.16	11.03	13.27	13.75	14.21	

\* Estimate//Source: a. World Trade Atlas; b. DANE, Government of Colombia's Statistics Agency; c. Banco de la Republica (Central Bank); d. Own estimates





**Main Importers**

- Burns of Colombia, a branch of Fleischman, imports Caravan products from the U.S.A.
- Levapan imports flavor enhancers, creams and fillers from Holland as a result of a strategic alliance with PURATOS. They market among bakeries a soft bread enhancer with a high rotational system.
- Nabisco imports General Mills brand products from the U.S.
- Industrias del Maiz imports premixes from New Zealand
- Artegel imports creams and icing from Italy under the Pregel brand.
- Deltagen imports bakery and pastry ingredients from Holland under the Sonneveld brand; powdered milk under the Datraco / Armor brand from Holland and France. Antioxidants and special chocolate fats as well as other products under the brand Lodors Croklaan, from Holland. Wheat and corn products of the Amylum brand from Belgium. DCL yeast from England, Le Saffre from Mexico, and Biocon natural colors from Peru and bread enhancers from Ireland.
- Danisco bread enhancers, dough preservatives and yeast come from the U.S.
- Enzipan of Colombia imports preservatives and bread enhancers.
- Acegrasas and TEAM import Rich's bread enhancers and the full line of yeast, creams and fruit fillers from the U.S.
- La Campiña imports and distributes Pillsbury cake premixes from the U.S.
- Factors and Marketing imports U.S. bakery enhancers for their customers Carulla supermarkets and El Corral a fast food chain.
- Harinera del Valle imports and distributes U.S. enhancers. It also produces a whole wheat premix that is sold to the bakery industry and has developed a premix for pancakes, brownies and cookies with the brand Haz de Oros.
- Pan Factory imports German enhancers and premixes.
- Colombiana de Comercio Corbeta (Alkosto Hypermarket) imports U.S. pancake premixes.
- T-Va Pan 500 imports U.S. premixes and Belgian bread enhancers.
- Bimbo imports U.S. bread enhancers.
- Donucol imports U.S. doughnut premixes.
- Pan Pá Ya imports Spanish premixes.
- Gran Cadena de Almacenes Colombianos – CADENALCO - imports pancake premixes from the U.S. and Canada.
- Grandes Superficies de Colombia (Carrefour) imports bakery premixes from France and Mexico

**Import Participation by product - 2003**

HS	Description	Imports million dollars
19.01.90.90.00	Other mixes for the preparation of bakery and pastry products.	5.40
21.06.90.10.00	Powders for the preparation of puddings, creams, ice creams, desserts, and similar items	4.51
21.06.90.50.00	Bread enhancers	3.00
19.01.20.00.00	Mixes for bakery product preparations	0.35

Source: World Trade Atlas Data Base.

## VII. LOCAL PRODUCTION

Several local companies are importing the ingredients to prepare premixes and bread enhancers tailored to the needs of Colombian users. Universal bread enhancers perform different under different conditions, i.e. altitude over sea level. The products should be adapted for humidity retention, product expansion, and longer shelf life. Additionally, local wheat mills have begun to manufacture premixes for pancakes, brownies and bread preparation, etc.

### National Premix Producers

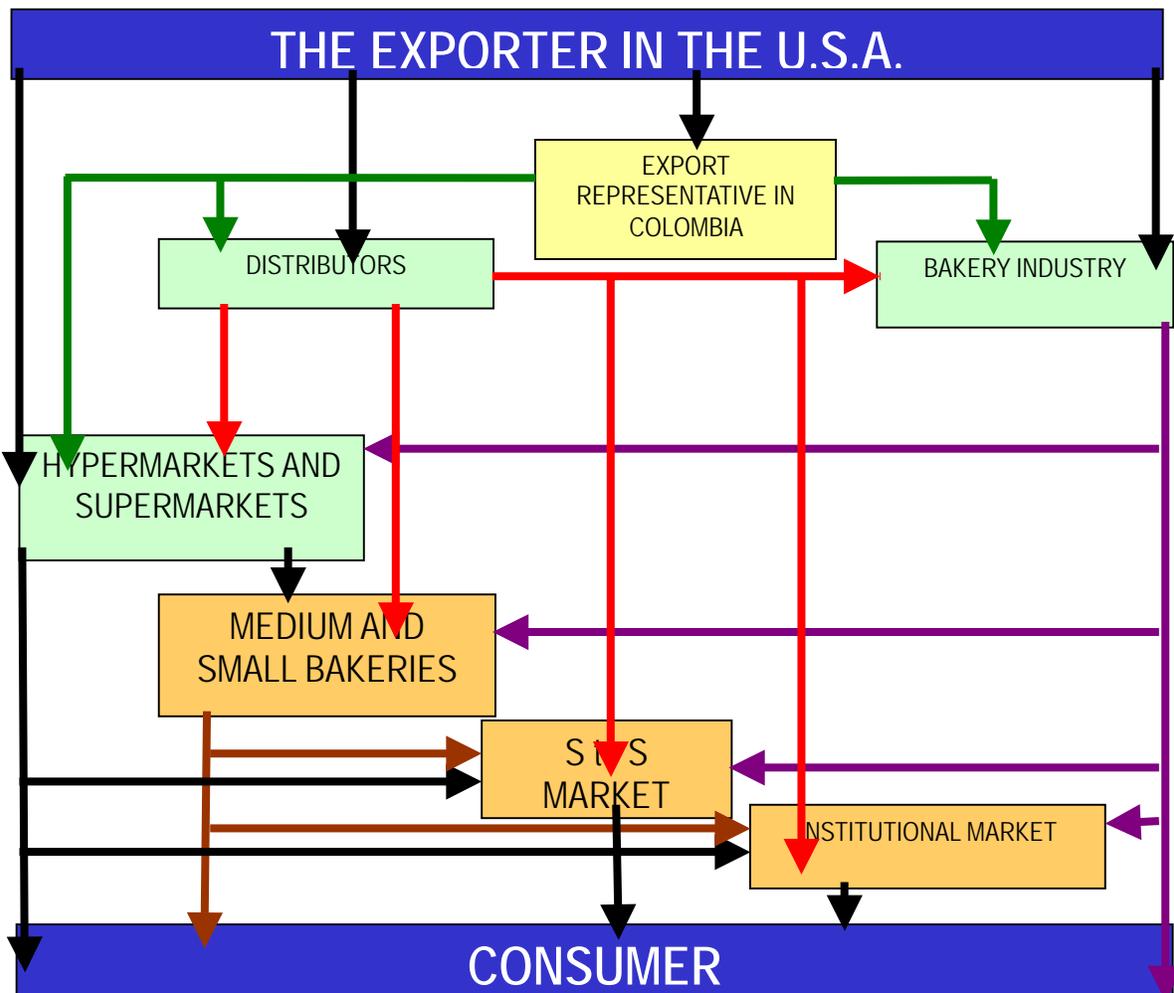
The following companies import raw materials (emulsifiers, enzymes, milling additives, and gluten) as they develop bread enhancers reportedly adapted to the local industry needs:

- Deltagen
- Industria Quimica Real de Cartagena
- Pronut
- Coldaenzimas import European enzymes.
- Konfynt imports dough for light (diet) cakes

Manufacturers of premixes aimed to the mass consumption market:

- Industrias del Maiz, subsidiary of Corn Products Corporation, manufactures premixes for buñuelos, almojábanas, and pan de bono (typical products).
- Quaker produces premixes for cakes and brownies under the Quaker brand, and Aunt Jemima pancakes.
- Molinos del Cauca produces dough for buñuelos under El Maizal brand.
- Doña Torta produces premixes for cakes and brownies under the Doña Torta brand.
- Grand ma´s manufactures cake mixes under the Mam-ia brand.
- Diety (dietary pancakes) produced by Alimentos Especializados Ales
- Harinera del Valle manufactures cake and brownie mix under the Haz de Oro brand
- Unilever, Sigra Division, produces muffin and doughnut mixes.

## VIII. DISTRIBUTION CHANNELS



Market breaking and permanence is assured by the presence of a representative in Colombia. The local representative not only manages product catalogs and prices but also provides technical consulting services to distributors and end-users, facilitates communications, and develops full market insight. The European competitors are good on this aspect.

The hypermarkets, supermarkets and wholesale distributors also import directly.

The wholesale distributors serve the hypermarkets, supermarkets, small and medium sized bakeries, the shop to shop (S to S) market, and the institutional market.

The hypermarkets and supermarkets sell directly to the end consumer acting as retailers, but they too act as wholesalers supplying to small and medium size bakeries, the S to S market and the institutional market.

The baking industry and/or mills add enhanced baking elements or designing premixes to flour that is distributed through hypermarkets. The milling industry also provides technical assistance to bakeries along the chain.

The medium and small bakeries buy premixes through wholesale distributors, hypermarkets, or they buy products directly from the baking industry consolidating their sales volume thanks to the geographical dispersion of their points of sale, selling to the S to S market, the institutional market and the end consumer.

There are large wholesale distributor chains that besides assisting the industry leaders, arrive with their sales force at the medium and small neighborhood bakeries almost daily selling them their products, including premixes.

These are:

**The Team Group:** This is a strategic marketing alliance among six large Colombian oilcrushing and refiners: ACEGRASAS, FAGRAVE, GRAVETAL, GRANADINOS, GRASAS S.A. and GRASYPLAST. Team was created in 1999 and since then, it has established commercial ties with multinational companies for distributing their products. The wide portfolio of products includes the following categories: Oil, specialized margarine for bakeries, creams, fruit fillers, yeast and packing materials. Besides supplying large industrial bakeries, Team also meets the input requirements of other participants in the local bakery and pastry industry in Colombia. Their portfolio of products includes: Margarine 5A, Alipan, Margarina Industrial Dagusto, Hojaldrina, La Sevillana, and Rich's brand products. It has encouraged bakers to participate in a club called PANICLUB, which has around 10,000 members throughout the country. Services such as technical consulting in the handling of Team products, a web page with product information, purchase discounts are some of the incentives to Club members.

**Levapan:** Is a leading and traditional company specializing in yeast. Their subsidiary T-Vapan 500 has developed an association with Sibra of Unilever, Industria del Maiz to import and distribute Puratos products for which they hold exclusive distribution. Levapan has its own sales force that visits directly with the baking industry, hyper and supermarkets, restaurants, cafeterias, and universities throughout the country. Levapan distributes its own products and publishes the magazine "Pan Caliente" (Hot Bread) for the members of Levapan's club. Besides consulting services, they carry out recreational activities for the members of the club.

**Coopan** is a cooperative that congregates bakers from Medellín and the Corona company associated with the Nacional de Chocolates and Industrias Alimenticias Noel. Although concentrated in the Medellín region, Coopan also has a national distribution network.

Other distributors are:

Comercializadora Intercontinental E.A.T.

Insumos para Panaderia Ltda.

Comestibles la Ochenta: sells finished products to small bakeries.

Lloreda Distribuciones: manufactures and distributes bakery margarine in the whole country although it is strong in the region of the Cauca river valley, southern Colombia.

## IX. USERS OF PREMIXES

The main current and potential users of premixes are:

### Major Companies in the Food Processing Sector

**Bimbo of Colombia:** A Mexican investment with presence in the U.S. and in 14 countries in Latin America and Europe, selling more than 3,600 products and 100 known brands.

**Comapan Ltda.:** A Colombian company with more than 1,000 employees. It produces and sells industrialized bread, snacks and sauces as well as products for the confectionery industry.

**Productos Ramo:** A traditional Colombian company that distributes its own products at a national level. Besides bakery products, it sells snacks and candy.

**Inversiones Flores Lamprea Ltda.:** (Panificadora Guadalupe)

**Industria Santa Clara Ltda.:** has 350 employees. It produces and sells industrialized bread with focus on the mass consumption through chain stores.

**Pan Pa Ya Ltda.:** A Colombian chain that has 27 sale outlets in Bogota. Sales are concentrated in the institutional market for bakery products, confectionery, and cookies.

**Comestibles La Rosa:** A Colombian company belonging to the Nestlé group.

**Industrias Alimenticias Noel** is the largest cookie and cracker producer in Colombia. It belongs to the Antioquia economic conglomerate.

**Industrias Alimenticias Perman S.A.**

**Pan Santana:** (Barranquilla) strong in the production of industrial packaged bread, sliced bread, sandwich/hamburger/hot dog bread, etc.

**Donucol Ltda.:** is a franchise of the Dunkin' Doughnuts International. It has the exclusive representation of Baskin & Robins ice cream in Colombia.

**Mamipan of Colombia:** This bakery industry was founded in 1964 in Cali with outlets in Medellín and Pereira, western Colombia.

**Manuel Trillos y Cia.:** A leading bakery in Bucaramanga, northeastern Colombia.

**Ponqués Cascabel Reposteria Ltda.:** a pastry company located in Bogota where it has 11 outlets.

**Repostería Astor:** is the oldest and noted confectionery and pastry organization in Medellín.

**San Marcos y Cia.:** has around 100 employees. It produces bread, cakes and cookies.

**Productora y Comercializadora de Alimentos S.A.:** (Gate Gourmet) they cater bread for the leading local airline (Avianca).

**Servipan de la Costa:** is one of the largest industrialized bakeries in Barranquilla with 100 employees.

## Hyper and Supermarkets In the Retail Sector

Carrefour  
Cafam  
Carulla -Vivero – Merquefacil

Surtimax  
 Makro de Colombia  
 Olímpica - Sao  
 Almacenes Exito - Cadenalco ( Ley, La Candelaria y Pomona)  
 Alkosto  
 Cacharrería La Catorce  
 Colsubsidio

## X. COSTS AND PRICES - 2004

### At the Industrial level

The price of flour to the consumer is \$17 for a 50 kilo sack  
 The price of the premix for doughnuts, almojabanas and pan de yuca, (Colmaiz brand) is \$7.47 for 12.5 Kilograms.

#### Levapan:

The premix for rye bread is priced \$16,40 - 5 kilograms

The prices for enhancers are:

Toupan (special mix for French bread and toast) \$5.80/kilogram.  
 S 500 Gold (For soft bread) \$4.80/Kilogram.  
 Easy rye for multigrain bread, \$24.40 for 6.25 kilograms.

#### Harinera del Valle – Haz de Oro:

Mix for whole wheat bread, \$27.00/50 kilogram sack

#### Fleishman:

Johogagen premix for French bread and Crust, \$75.40/25 kilogram.  
 Enhancer for crispy dough, \$5.30/Kilogram  
 Enhancer for soft dough, \$5.70 Kilogram

#### Richs brand Creams:

Vanilla cream y whipped cream \$12.38/4 Kilograms.  
 Chocolate, \$13.29/4 Kilograms.

### At the Supermarket Level

#### Prices to the consumer:

To the consumer the price for flour is \$0.60/kilogram.

- Baking powder, \$0.85/100 grams.

-

Premix for Aunt Jemima Pancakes (Quaker)	U.S. \$2.40 - 600 grams
Premix for Konfyt Cakes (low calorie)	U.S. \$2.10 - 500 grams
Premix for Quaker Cakes	U.S. \$1.36 - 500 grams
Premix for Doña Torta cakes	U.S. \$1.30 - 500 grams
Premix for Pillsbury Cakes	U.S. \$2.32 - 517 grams
Premix for Haz de Oro Cookies	U.S. \$1.12 - 340 grams
Premix for Diety Cakes	U.S. \$1.60 - 500 grams

Premix for Del Maiz buñuelos

U.S. \$1.70 - 350 grams

Large companies are used to provide credit on 30, 45 and 90-day payments. Early payment discounts are similar to the financial cost of money at the bank.

Most companies grant discounts from 5 to 15% for volume purchases over 50 kilos.

Small bakeries operate on a cash basis. Medium size bakeries, after a credit checking, may get up to 45 days for payment.

Since January of 1996 all imports and sales of consumable products made in Colombia pay a 16% value-added tax (IVA). This tax is paid on the CIF value (in Colombian pesos), in addition to the import duties.

Next, we illustrate how the taxes affect the original price of the product with a 20% import tax.

how taxes affect the original price	
1. FOB purchase price	U.S. \$ 100.00
2. Insurance and freight cost	U.S. \$ 20.00
3. CIF price	U.S. \$ 120.00
4. 20% duty on the CIF price	U.S. \$ 24.00
5. 16% Value-Added Tax (IVA)	U.S. \$ 23.04
<b>TOTAL IMPORTER'S COST</b>	<b>U.S. \$ 167.04</b>

Additionally, the Society of Customs Intermediaries (SIAS) has agreed to the following rates:

Rates	
Customs Agent Commission	0.3% on the CIF value.
Minimum Charge	U.S. \$ 80
Storage	0.35% on the CIF value.
Cold Storage	0.40% on the CIF value
Transfer to the Customs Zone	U.S. \$ 70
Taxes	16% on the FOB value
Corresponding Tax Obligations	
Previous Approvals	U.S. \$ 36

Documentation (includes stationery expenses, etc.)	U.S. \$ 30
The value of the Customs Agency Charges are approximately equal to 40% over the CIF value of the merchandise	
CIF VALUE = FOB VALUE + INTERNATIONAL FREIGHT + INSURANCE	

## XI. OTHER PROSPECTIVE PRODUCTS

Imports of ingredients other than pre-mixes for the bakery and pastry industry are promising trade prospects. In 2003, imports of those ingredients amounted to \$48 million.

HS	Description	Imports 2003 million dollars
21.06.90.99.00	Other food preparations containing vitamin mixtures	12.89
21.06.90.92.00	Other food preparations containing vitamin mixtures	6.40
19.01.90.10.00	Malt extract	1.29
21.02.10.90.00	Other live yeast	1.75
11.08.13.00.00	Potato starch	1.15
35.05.10.00.00	Dextrin/other starches and modified starches	1.52
29.18.13.00.00	Salts/esters and tartaric acid	0.36
11.09.00.00.00	Wheat gluten	0.35
11.08.11.00.00	Wheat starch	0.11
21.02.30.00.00	Prepared baking powder	0.12
04.02.10.90.00	Other powder/skimmed milk	0.09
08.06.20.00.00	Prunes and raisins	4.49
15.16.20.00.00	Fats and vegetable oils and by-products	4.31
18.06.31.00.90	Other chocolates and cocoa preparations	3.92
08.09.30.00.00	Fresh peaches	2.40
04.04.10.10.00	Partially or totally demineralized milk whey	2.42
15.17.10.00.00	Margarine except liquid margarine	2.96
17.02.30.10.00	Glucose and glucose syrup	1.93
Total other products		\$ 48.47

Source: World Trade Atlas Data Base.

The study identified the following products as a need for the bakery/pastry industry:

- Milk and cheese flavors
- Glucose as there is only one producer and distributor in the country: Del Maiz
- Dried egg yolks because the local product shows a poor performance.
- Whey: currently a substitute is being imported from the U.S. There is no whey production in the country.

## XII. MARKET ACCESS

### Trade Regulations and Related Aspects.

As a member of the Andean Community (CAN) and the Latin American Integration Association (LAIA), Colombia maintains a system of preferential tariff rates for specific imports from member countries. In December 1991, the presidents of the Andean Community (CAN) countries (Bolivia, Colombia, Ecuador, Peru, and Venezuela) met in Cartagena with the purpose to accelerate the regional free trade market with common external tariff wall of 5, 10, 15, and 20 percent. These duty levels became effective in January 1995.

The following are Colombia's most important multilateral and bilateral free trade agreements: The Andean Free Trade Agreement with Venezuela, Ecuador, Peru, and Bolivia; the Latin American Integration Association (LAIA) with Argentina, Brazil, Mexico, Chile, Paraguay, Uruguay, El Salvador, Costa Rica, Guatemala, Nicaragua, Honduras and Cuba; the bilateral free trade agreement with Chile; and the G-3 (Group of 3) with Venezuela and Mexico. A free trade agreement between CAN and Mercosur (Brazil, Argentina, Paraguay and Uruguay) will be in effect in July 2004.

The large number of integrated agreements signed by Colombia has created a complex system of tariffs to be applied according to the different treaties.

The following example of import tariffs for selected bakery products illustrates some of the agreements:

HS	Description	Duty	Sales Tax	Andean Group	G-3	Chile	Aladi
21.06.90.10.00	Powders for the preparation of puddings, creams, ice creams, desserts, and similar (1)	15%	16%	0%	13.2%	0%	13.2% Arg. Bra 9.9% Parag 12% Urug. And Cuba
19.01.90.90.00	Other mixtures and pastas for the preparation of products for bakery and pastry shops. (1) (2)	20%		0%		0%	
21.06.90.50.00	Bakery enhancers (1)	15%	16%	0%	0%	0%	
19.01.20.00.00	Mixes for the preparation of bakery products (1)	20%		0%		0%	

The sanitary permit from INVIMA must be attached to the import registration. Requires a sanitary permit issued by ICA (Colombian Agricultural Institute)

Notes: Andean Group – imports from Venezuela, Peru, Ecuador and Bolivia  
G-3 - Imports from Mexico and Venezuela  
Chile – Imports under the free trade agreement with Chile  
ALADI – Preferential duties for other Latin American countries

## **Laws Concerning Foods**

### **DECREE NUMBER 1944 OCTOBER 28 OF 1996**

Regulates the fortification of wheat flour and establishes commercial conditions, labeling, monitoring and control.

The micronutrients must be added in the form of a premix to facilitate the blend with the flour. The calcium can be added separately of the premix.

The quality of micronutrients and the premix vehicle must meet the technical specifications established by the Food Chemical Codex (FCC), and the Official Pharmacopoeias in Colombia.

The label on the wheat flour container or package, besides the labeling conditions established by the resolution 8688 of 1979, will indicate in the text "Fortified Wheat Flour". The quantity of micronutrients added must be stated in milligrams per kilogram (mg/kg) of flour. The National Institute for the Surveillance of Drugs and Food (Invima) will monitor and control the fulfillment of the provisions contained in the decree for fortified wheat flour and the premixes. INVIMA will take wheat flour and premix samples periodically for lab analysis.

### **RESOLUTION No. 001508 OF NOVEMBER 19 2002.**

This resolution prohibits the use of bromate.

### **DECREE 2106 OF SEPTEMBER 20, 1996**

The decree 2106 of September 20, 1996 establishes the norms of identity and purity of the sweeteners used in food products.

In the specific approaches to sweeteners, the Colombian legislation follows the rules established by qualified international organizations such as the Scientific Committee for Food and the joint committee of FAO and the World Health Organization (WHO) experts on food additives (JECFA).

Both domestically produced sweeteners and those imported into Colombia must comply with the Colombian legislation before being used in food.

There remain a few repealed provisions of equal or inferior scope that are contradictory to that which has been prepared in the present decree. In particular, the purity criteria of the additives E 420 (i) Sorbitol; E420 (ii) Sorbitol Syrup, and E421 Mannitol, included in the attachment to the Decree of July 28, 1988. This decree indicates the purity levels for stabilizers, emulsifiers, thickeners and jellies, as well as the diluters or support for carrageen and pectins authorized for use in food manufacturing (Official Gazette of August 12, 1988).

**DECREE 60 OF JANUARY 18, 2002**

Promotes the application in Colombia of the System of Hazard Analysis and Critical Control Points (HACCP) in food factories and regulates the process of certification.

The decree has as its objective the promotion and application of the System of Hazard Analysis and Critical Control Points, HACCP, as a system or method of insurance of the innocuousness of foods and to establish its certification procedure, including raw materials, from first production until final consumption.

The National Institute for the Surveillance of Drugs and Food (INVIMA), and other national health entities, according to law, will exercise inspections, monitoring and control, and will adopt the actions of prevention and pursuit with the purpose of guaranteeing the execution of this decree on "Hazard Analysis and Critical Control Point".

**DECREE 12 70 - JUNE 12 OF 2002**

All imported food or drinks sold under a factory brand, or with certain names, must have a sanitary registration.

**NTC 512**

The main reason for this NTC (Technical Colombian Norm) is to establish the minimum labeling requirements for containers and packing of products for human consumption. Any substance (including food additives used in the production or preparation of food that will be present in the final product, although somehow modified) must be listed. The label of packaged food products should contain the following information:

1. The specific name of the product, not generic name or denomination.
  - a) At least one name must be used when several names have been established for a food product.
  - b) When it doesn't have such names, a common or usual name dedicated by common usage can be used as long as an appropriate descriptive term does not induce to error or deceit to the consumer.
  - c) A "coined", "made up", "fabricated", or "trade mark" can be used, whenever it goes together with one of its indicated names a) on the label and b) on the main surface of the item.

1.2 The label that is on the main surface of the item, next to the name of the food, in readable form to the eye, will appear the words or necessary additional phrase to avoid parlaying any error or deceit to the consumer with regard to the nature and authentic physical state of the food. This includes but is not limited to the type of covering, presentation or condition, or the type of treatment to which they have been subjected to, for example, dehydration, concentration, reconstitution, smoke, etc.

2. The ingredients should be listed on the label.

**RESOLUTION NUMBER 10593 of Julio 16, 1985**

The Decree 2106 of July 26, 1983 authorizes the Ministry of Health (currently known as Ministry of Social Protection) to elaborate a list of food additives apt for human consumption that can be used within the country once the advisory committee has determined the significance of article 7 of the mentioned decree. For the effects of this resolution, the use

(maximum quantity) of the following colorings (dyes) in food products ready for consumption is established:

NATURAL COLORINGS AND COLORINGS THAT ARE IDENTICAL TO NATURAL COLORINGS

Alkane, Alkannin, Acusine - Color Index 75530

Anthocyanins

Caroteno - Color Index 75130

Beta-apo-8-caroteneol acid

Beta-apo-8-caroteneol – Color Index 40820 BPM

Canthaxanthin – Color Index 40850 BPM

Xanthophylls BPM

Annatto or Annatto – Color Index 75120 BPM

Saffron, Crocus and Crocetin – Color Index 75100 BPM

Chlorophyll – Color Index 75810 BPM

Copper and Chlorophyll complete - BPM

Copper and Chlorophyll complete and sodium and potassium salts - BPM

Riboflavin and Riboflavin-5- Sodium phosphate - BPM

Beet Red and Betaine - BPM

Cochineal, Carmine and Carmine Acid – Color Index 75470 BPM

Curcuma and Curcumin – BPM

#### RIBOFLAVINE

This is 7,8-Dimethyl-10- (ribo 2,3,4,5,- tetrahydroxy-pentyl) Isoalloxazine  
Yellow or yellowish-orange powder extracted from natural matters or  
synthetically manufactured, barely water-soluble.

#### Specifications:

* Purity	98-102%
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* Loss during drying process	1.5%
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* Ashes (maximum)	0.3%
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#### Maximum contents of:

* Arsenic as As	1 mg/kg
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* Lead as Pb	10 mg/kg
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**RIBOFLAVINE – 5 - SODIUM PHOSPHATE**

This is a fine, yellow or yellowish-orange powder. One gram of powder dissolves in approximately 30 ml of water.

**Specifications:**

* Purity	not less than 75% and no more than 75%, expressed as Riboflavine phosphate.
* Freedom	no more than 1%, calculated as PO. Free Riboflavine: no more than 6%.
* Loss during drying process	no more than 7% of ash: a Maximum of 25%
* Riboflavine Diphosphate	a maximum of 6% (calculated as Riboflavine) pH: 5.0-6.5 (1% solution)
* Specific rotation	between + 37° and +42°, calculated as a dry base
Maximum contents of:	
* Arsenic as As	3mg/kg
* Lead as Pb	10mg/kg

**ARTICLE 9.** The mixture of authorized colorings by the Ministry of Health should have on their label the following indications:

1. Commercial Name
2. Name of the maker, importer or salesperson
3. The maker's address, production lot number. Net content.
4. Color Index Number of the contained colorings
5. Name of the vehicles, supports or solvents used, approved by the Ministry of Health.
6. The statement "Food Coloring Mixes approved by the Ministry of Health"
7. Number of operational sanitary license

A written statement, in the body of the import license, that the colorings or mixtures of colorings to be imported meet all the requirements of this resolution.

**ARTICLE 15.** The officials of the Ministry of Health and those of the regional health services will inspect and take samples on a periodical basis, to verify the fulfillment of the requirements set forth in the resolution.

**RESOLUTION 599 of January 20, 1998**

A standard application form will be adopted for the modification and renewal of the sanitary registration for food products as well as the establishment of a nomenclature for the expedition of sanitary registration for both national and imported food products.

**RESOLUTION NUMBERS 126 OF February 22, 1964**

Dictate the norms over the elaboration and control of fats and edible oils for human consumption.

ARTICLE 17. Industrial margarine will be denominated those, which are not enriched, and whose melting point is between 20°C and 42°C. The margarines can or cannot be supplemented with vitamins. The resolution prohibits the sale of industrial margarines for direct human consumption that will only be sold to bakeries, pastry shops and similar establishments.

ARTICLE 30. With the name of "fat and coconut oil" is understood the fatty material extracted from the fruit pit of the coconut tree (*cocos nucifera* and *cocos butyracea*). Commercial coconut fats and oils will respond to the physical and chemical constants of the American Oil Chemists Society.

**RESOLUTION 4124 of April 15, 1991**

Title V Foods are regulated by Law 09 of 1979 concerning the amount of antioxidants that are allowed in foods. The table below lists the antioxidants and the synergists of those antioxidants as well as the maximum quantities permitted in food ready for consumption:

ANTIOXIDANTS	the maximum quantities
1. Ascorbic acid and their salts	BPM
2. Isoascorbic acid (erythrorbic) and their sodium salts, up to	500 mg/Kg
3. Citric acid and its sodium salt	BPM
4. Tert-butylhydroquinone TBHQ, only or in mixture with BHA, BHT and gallate, but these should not exceed 100 mg/kg	200 mg/kg
5. Butylhydroxyanisole BHA, only or in mixture in TBHQ, BHT and gallate, but these should not exceed 100 mg/kg	200 mg/kg
6. Butylhydroxytoluene BHT only or in mixture with BHA, TBHQ or gallate, but these should not exceed of 100 mg/kg	200 mg/kg
7. Isopropyl citrate	100 mg/kg
8. Monoglyceride citrate	100 mg/kg
9. Ascorbic stearate, only or mixed with Ascorbic palmitate	500mg/kg
10. Dodecyl, acrylo and propyl gallate only or in mixture with BHA BHT or TBHQ	100 mg/kg
11. Gum of guaiacol	BMP
12. Ascorbic palmitate, only or mixed with ascorbic estearate	500 mg/kg

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13. Dilauryle Thiodiopropionate 14 Tocopherols and alphotocoferols 200 mg/kg

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14. Tocopherols and alphotocoferols BPM

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The antioxidants and the antioxidant synergists mentioned in the present resolution should fulfill the specifications set forth in the Codex Alimentarius, the Food Chemical Codex and the valid Pharmacopoeias in Colombia. The antioxidants and the synergists, allowed by article 20 of the present resolution, shall have the following information on the label:

1. Technical name, according to article 2 of above resolution
2. Producer name, importer or seller
3. Address of producer, production lot number and net content
4. The phrase "Antioxidant for food authorized by the Ministry of Health"
5. Number of operational sanitary license

For the previous approval for the importation of food antioxidants, the importer should provided the following basic information to the Ministry of Health:

1. A written statement in the import license, assuring that the antioxidant meets all the requirements of above resolution.
2. Technical name of the antioxidant, according to article 20 of the resolution.  
Level of purity.

#### **RESOLUTION 4125 of April 5, 1991**

Title V - Foods are regulated by Law 02 of 1979 in relation with preservatives used in food. According to this, the following maximum quantity of preservatives are allowed in food:

PRESERVATIVES	the maximum quantities
1. Benzoic acid and their calcium, potassium and sodium salts	1000 mg/kg
2. Propionic Acid and their calcium, potassium and sodium salts up to	3000 mg/kg
3. Sorbic acid and their calcium, potassium and sodium salts up to	1000 mg/kg
4. Calcium ascorbate	1000 mg/kg
5. Sulfur dioxide and its salts, calcium bisulfate, metabisulfite and sulfite, potassium and sodium up to	1500 mg/kg
6. Hexamethyltetramine	600 mg/kg
7. Nisin	125 mg/kg
8. Potassium and Sodium Nitrate up to	500 mg/kg
9. Potassium and Sodium Nitrite up to	200 mg/kg
10. Ethyl, methyl and propyl parahydroxybenzoates	1000 mg/kg

- When benzoic acid and sorbic acid are mixed, their total cannot exceed 1250 mg/kg

The preservative substances should be innocuous and will not disguise sanitary deficiencies of the raw materials, nor bad manufacturing practices. They will also meet the specifications set forth by the Codex Alimentarius, the Food Chemical Codex or the valid Pharmacopoeias in Colombia

The preservatives allowed in article 20 of the present resolution will show on the label the following indications:

1. Technical name, according to article 20.
2. Name of producer, importer or distributor.
3. Producer address, production lot number and net content.
4. The phrase "Food preservatives approved by the Ministry of Health".
5. Number of the operational sanitary license.

When preservative mixtures are used, the sum of the fractions employed by each one divided by their respective allowed dose should not be superior to one (1). For effects of the previous import approval for food preservatives, the following information should be provided to the Ministry of Health:

1. A written statement in the import license, assuring that the preservatives meet all the requirements of above resolution.
2. Technical name of the product, according to article 20 of the resolution.
3. Level of purity.

#### **RESOLUTION 5213 of July 1, 1992**

The former Incomex under the Ministry of Foreign Trade delegated on the Ministry of Health the monitoring of the sanitary requirements for the approval of the official food import registration and other legal procedures for food trade.

The delegated state agency will review and verify the following aspects for the official import registration:

- o A notarized copy of the sanitary registration form issued by the Ministry of Health for each one of the imported food products. It has to state if the product is imported for distribution and sale.
- o The name of the food products to be imported will correspond exactly to the ones that listed in the sanitary registration.
- o The exporter name shown on the official import registration form should correspond the "title holder" shown on the sanitary registration.

**XIII. KEY CONTACTS****American Embassy**

Bogotá, Colombia  
Foreign Agricultural Service  
United States Department of Agriculture  
David Mergen, Agricultural Attaché  
Alberto Restrepo, José Leonardo Pinzón, Agricultural Specialists  
Alicia de Jacobs, Marketing Specialist  
Tel: (571) 315-4147 ó (571) 383-2406 / 2801 / 2805  
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agbogota@fas.usda.gov

**Colombian Government Agencies****Departamento Administrativo Nacional De Estadística - Dane (National Department Of Statistics)**

Contacts: Cesar Augusto Caballero Reynoso, General Director  
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Bogota, D.C. Colombia  
E-Mail: [Www.Dane.Gov.Co](http://www.Dane.Gov.Co)

**Direccion De Impuestos Y Aduanas Nacionales-Dian (Internal Revenue And Customs Administration)**

Contacts: Mario Alejandro Aranguren Rincon, Director General  
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**Instituto Colombiano de Normas Tecnicas-Icontec (Colombian Institute of Technical Standards)**

Contact: Fabio Tobon-Londoño, Director  
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**Superintendencia de Industria y Comercio (Industry and Commerce Superintendency)**

Contact: Jairo Rubio Escobar, Superintendent  
Carrera 13 No. 27-00, P5  
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**Trade Associations****Asociacion Nacional de Exportadores-Analdex  
(National Association of Exporters)**

Contact: Javier Diaz-Molina, President  
Carrera 10a. No. 27-27  
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E-Mail: [Www.Analdex.Org](http://Www.Analdex.Org)

**Federacion Nacional de Molineros de Trigo – Fedemol**

Contact: Diego Miguel Sierra, General Manager  
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**Asociacion Nacional de Industriales - Andi  
(National Association of Industrialists)**

Contacts: Luis-Carlos Villegas-Echeverry, President  
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**Camara de Comercio Colombo-Americana- Colamcham  
(Colombian-American Chamber of Commerce)**

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**Camara de Comercio de Bogota  
(Bogota Chamber of Commerce)**

Contacts: María Fernanda Campo Saavedra, President  
Andres López Valderrama , Executive Vice-President  
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**Confederacion Colombiana de Camaras de Comercio-Confecamaras  
(Colombian Federation of Chambers of Commerce)**

Contact: Eugenio Marulanda, Executive President  
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**Consejo de Empresas Americanas - Cea  
(Council Of U.S. Companies Operating in Colombia)**

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**Federacion Nacional de Comerciantes - Fenalco  
(National Merchants Federation)**

Contact:  
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www.Fenalco.Com.Co

**Distributors: Hypermarkets****Alkosto**

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**Almacenes Exito S.A.**

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**Grandes Superficies de Colombia - Carrefour**

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**Carulla Vivero S.A.**

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**Makro**

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**Supermarkets/Department Stores****Caja Colombiana de Subsidio Familiar - Colsubsidio**

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E-Mail: [Www.Colsubsidio.Com](http://Www.Colsubsidio.Com)

**Caja De Compensacion Familiar-Cafam**

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**Surtimax**

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**Wholesalers****Almacen La Esmeralda del Panificador**

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**Distribuciones Jelumar Ltda.**

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**Distribuidora Idemar**

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**Distribuidora Fontiquesos**

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**Distribuidora La Antioqueña**

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**Importers and Manufacturers of Premixes****Acegrasas Team S.A.**

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**Burns Philip Colombia S.A.**

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Contact: Fredy Durán, General Manager  
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Cali, Valle  
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**Danisco Colombia Ltda.**

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**Deltagen Ltda.**

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**Enzipan de Colombia Ltda.**

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**Factores y Mercadeo**

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**Industrias del Maiz S.A.**

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**Industrial Taylor Ltda.**

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**La Campiña S.A. - Pillsbury**

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**Levapan S.A.**

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**Unilever Andina S.A.****Division Sibra S.A.**

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**Cia. Harinera Industrial Ltda.**

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**Generoso Mancini & Cia. Ltda.**

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**Harinera del Valle S.A.**

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Contact: Carlos Arcesio Paz, General Manager  
Cra. 1ª No. 47-20  
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(572) 418 7013  
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E-Mail: Wwww.Harineradelvalle.Com

**Harinera Indupan Ltda.**

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**Harinera Antioqueña S.A.**

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**Industria Molinera del Norte S.A.**

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Bogotá D.C.

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No. employees : 17

Producen Y Comercializan Harina La Aurora, Producida Con Trigo Importado

**Masapan S.A.**

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Julio Cesar Cifuentes, Director Comercial

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Bogotá D.C.

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**Molinos El Lobo Ltda.**

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**Molinos Santa Marta S.A.**

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**Procoharinas Ltda.**

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**Producers of Bakery Expendables****Al Natural Ltda.**

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**Alimentos Rico Pan Ltda.**

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**Disaromas Ltda**

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**F y M Chocolates Ltda.**

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**Harinera Uniquimica S.A.**

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**Industrial Bakeries****Alimentos Bonfiglio Ltda.**

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**Aeroservicios**

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**Bimbo de Colombia S.A.**

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**Colpan Ltda.**

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**Comapan S.A.**

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**Comercializadora D'onofrio E.A.T.**

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**Deli**

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**Donucol S.A. –Dunkin’donuts – Baskin Robins**

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**P.C.A. S.A. (Gate Gourmet)**

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**Panaderia Santa Clara Ltda.**

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**Pan Pa' Ya Ltda.**

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**Panaderia San Marcos**

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**Panaderia Dulcerna**

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**Panaderia Santana Villa Viana**

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