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Colombia

Food Processing Ingredients

Trade Opportunities Continue to Grow

Approved By:

Michael Conlon,
Agricultural Counselor

Prepared By:

Benjamin Rau, Agricultural Attaché Ana Maria
Salinas, Agricultural Marketing Specialist

Report Highlights:

U.S. agricultural product trade opportunities abound after implementation of the U.S.-Colombia Trade Promotion Agreement (CTPA). Colombia remains a net importer of many agricultural products and cannot sufficiently source domestically the raw materials and ingredients to meet the growing demand of the food and beverage processing industry.

Post:
Bogota

Author Defined:
General Information:

SECTION I: MARKET SUMMARY

Colombia is the leading destination for U.S. agricultural exports in South America, followed by Peru, Brazil and Chile. In fiscal year (FY) 2017, U.S. agricultural exports to Colombia were valued at \$2.6 billion. Trade in U.S. agricultural products to Colombia has expanded as a result of the U.S.-Colombia Trade Promotion Agreement (CTPA), implemented in May 2012. Colombia is eager for access to other markets and has signed Free Trade Agreements (FTAs) with various countries and trade blocs, such as Canada, the South American Common Market (MERCOSUR), the European Union, South Korea, Costa Rica and a larger trade bloc, the Pacific Alliance, which includes Mexico, Peru and Chile. Colombia is awaiting final legislative and judicial approvals for FTAs with Israel and Panama.

Colombian Gross Domestic Product (GDP) grew at 2 percent in 2016, slower than previous year growth rates, but still higher than other Latin American economies. Millions of Colombians have moved out of poverty and into the low and middle income classes. These income adjustments have resulted in more household disposable income and changes in eating patterns, such as shifting diets from vegetable to animal proteins -- poultry consumption has almost doubled in the last ten years. Increasing demand for consumer-ready products has stimulated growth in fast food chain restaurants. This has impacted the food industry sector dramatically with food manufacturers desperately seeking a variety of high quality raw materials to adapt to changing consumer tastes and preferences.

Colombia is a net importer of many food processing ingredients and trade opportunities abound. For example, there is a growing domestic demand for higher quality confectionary products and ingredients are needed to complement a large chocolate producing industry to develop better quality chocolates and other candies.

Even though Colombia is a major producer and consumer of palm oil, the Colombian fats and oils sector must still import significant quantities of unrefined soybean oil, sunflower oil, and other oil seeds to meet industrial demand. The milling sector bakery and starches sector has benefited from innovation in packaging, flavors and healthier ingredients. Bread consumption has decreased due to low carbohydrate, "healthy eating" trends that have marginally changed food eating habits. The wheat milling and baking industry is rising to the challenge by conducting outreach campaigns to demonstrate that bread is a nutritional and healthy option for consumers, in addition to including new types of ingredients to capitalize on the trend.

Colombia's total imports of consumer oriented products grew eight percent in FY2017. The United

States has replaced Chile as the leader supplier of consumer oriented products. U.S. consumer oriented product exports were up 12 percent to \$573 million in FY2017, followed by Chile (\$248 million) and Brazil (\$141 million). Consumer-oriented products account for upwards of 22% of the distribution of U.S. agricultural trade to Colombia. The table below provides more details on consumer oriented product trade trends.

FY2017 Colombian Imports of Consumer Oriented Products by Country of Import

Country	Ranking	Import Value FY2016 (million dollars)	Import Value FY2017 (million dollars)	Change
Total		1,746	1,888	8%
United States	1	512	573	12%
Chile	2	237	248	4%
FTZ – FEMSA ¹	3	150	161	7%
Brazil	4	110	141	28%
Mexico	5	159	157	-2%
Other countries		577	609	6%

Source: Global Trade Atlas

Major Trends

In recent years, the Colombian food industry has undergone unprecedented consolidation and structural change through mergers, acquisitions, divestitures and new foreign competitors entering the market. This widespread consolidation in the retail, Hotel-Restaurant-Institutional (HRI) and food processing industries was driven by expected efficiency gains from economies of scale, resulting in significant impacts on market share and food prices. As well, internet e-commerce sales are becoming more popular and direct marketing through credit card promotions, flyers, polls, and sales calls to either home or office sites including home delivery service, are also growing in popularity. It is also important to note that distribution channels have become more efficient with the increased presence of foreign competitors.

Colombia is the third most populated country in Latin America after Brazil and Mexico at 49.5 million inhabitants. About 79 percent of the Colombian population resides in urban areas. Colombia is atypical of Latin America with decentralized urban centers and five cities with over one million residents: Bogota (8.0 million), Medellin (2.5 million), Cali (2.4 million), Barranquilla (1.2 million) and Cartagena (1.0 million). Urbanization is growing at a consistent 2 percent per year, stimulating changes in lifestyles and eating patterns. Urban households in Colombia are becoming more typically dual income, resulting in an increasing demand for food and shopping convenience. Western style, large supermarkets are part of a noteworthy retail transformation in the last decade with major, domestic and international grocery chains opening new stores, of varying sizes, at intense rates. Over the past seven years, the U.S. retail chain PriceSmart has developed a significant presence in Colombia, opening a total of seven stores in the country; Cali (two stores), Barranquilla,

¹ FTZ: Free Trade Zone

Bogota (two stores), Pereira and Medellin. Discount stores have increased market share and continue opening outlets throughout the country offering wide private label portfolios cheaper than traditional grocery chains. Koba-D1 now has over 600 outlets; Justo y Bueno has over 450 outlets while Ara has over 370 throughout the country.

Bad dietary habits are a big issue for the country since they are associated to overweight and heart diseases. Obesity affects over 50% of Colombian adult population. Although it is still low in children compared to other Latin American countries, it is growing, mainly among teenagers. Heart conditions are the leading cause of death in the country. Government of Colombia (GOC), specifically the Ministry of Health (MOH), has developed the National Strategy on the Reduction of Sodium Intake; in addition, some initiatives regarding advertising for children food products are becoming popular. Food manufacturers have positively reacted by developing healthier products and promoting healthier lifestyles.

Foodservice Sales of Packaged Food in Colombia by Category (Thousand Tons)

	CY 2015	CY 2017	CY 2017	Var (%) 2017/2016
Total	1,360.6	1,364.4	1,371.0	0.5%
Baked goods	246.9	244.6	243.3	-0.5%
Breakfast cereals	1.0	1.0	1.0	0.0%
Confectionery	1.1	1.1	1.2	9.1%
Dairy	208.8	206.4	203.8	-1.3%
Edible oils	110.3	113.5	117.8	3.8%
Ice cream and frozen desserts	2.2	2.2	2.3	4.5%
Processed fruit and vegetables	42.4	42.7	43.0	0.7%
Processed meat and seafood	300.9	299.3	298.6	-0.2%
Rice, pasta and noodles	427.5	433.9	440.0	1.4%
Sauces, dressings and condiments	12.5	12.7	12.9	1.6%
Savoury snacks	4.9	4.9	5.0	2.0%
Soup	0.2	0.2	0.2	0.0%
Spreads	0.9	0.9	0.9	0.0%
Sweet biscuits, snack bars and fruit snacks	1.0	1.0	1.0	0.0%

Source: Euromonitor

Advantages and Challenges for U.S. Exporters of Food Products for Processing

Advantages	Challenges
The U.S.-Colombia CTPA expands opportunities and market potential for many agricultural products.	Colombia has trade agreements with many other countries increasing competition with U.S. products.
U.S. agricultural products have a reputation for high quality.	Colombian per capita consumption for processed and semi-processed products is low, for example bread (24kg/year), compared to other Latin American markets.
Colombia is the largest agricultural trade destination for U.S. food product in South America.	U.S. products will have to maintain the reputation of higher quality in order to be competitive with local food processing companies, guaranteeing a consistent and uniform supply of products year round.
The growth of tourism and the hotel and restaurant sectors will require a greater array of raw materials and ingredients to make final products more appealing to foreigners and fast changing domestic consumer tastes and preferences.	There is a cultural misperception that frozen products are unhealthy and lack quality.
The growing lower and middle income population, specifically youth and working women of Colombia, are stimulating new food consumer trends and a growth in processed foods.	Internal transportation costs from ports of entry are costly due to extremely poor infrastructure.
Market opportunities for health foods and organic products are expanding given growing obesity trends and GOC support for healthy living campaigns.	Cold chain is deficient and Colombians have no clear understanding of this need to maintain product quality.

SECTION II: MARKET ENTRY

Exporter Business Tips

It will be critical for U.S. exporters entering the Colombian market to understand the customer's needs and how to meet their purchasing requirements and specifications. Additionally, it will be important to understand all Colombian standards and regulations to avoid issues at ports of entry. Critical considerations for market entry include the following:

- Competition is based on quality, price and service;
- Direct to consumers marketing strategies are imperative in order to penetrate the market, such

- as cooking demonstrations, tastings, among others;
- Social responsibility marketing techniques continue to be very strong, using sales to generate funding for social programs;
- U.S. suppliers should develop ways to meet the needs of the Colombian market through personal visits to better understand the market and identify needs of buyers and consumer trends;
- Use consolidation when exporting small amounts of product;
- Establish direct contact with hotel and restaurant chains;
- Develop business relationships with top executives like marketing directors, purchasing managers, and expose them to U.S. business practices;
- Participate in local trade and promotion shows, such as Alimentec, Agroexpo and Expovinos, and also be part of trade delegations;
- Many Colombian companies' representatives visit trade shows in the United States, such as the American Food and Beverage Trade Show and the Fancy Food Winter/Summer Shows, which are great opportunities to meet and educate Colombian importers;
- Develop, to the extent possible, Spanish marketing/communication materials;
- Work closely with local importers to comply with food import regulations to facilitate the registration and import of food products and minimize port of entry risks;
- Support the importer with promotional campaigns.

Market Structure

In recent years, the Colombian food industry has undergone unprecedented consolidation and structural change through mergers, acquisitions, divestitures and new foreign competitors entering the market. This widespread consolidation in the retail, Hotel-Restaurant-Institutional (HRI) and food processing industries was driven by expected efficiency gains from economies of scale, resulting in significant impacts on market share and food prices. As well, internet e-commerce sales are becoming more popular and direct marketing through credit card promotions, flyers, polls, and sales calls to either home or office sites including home delivery service, are also growing popularity. It is also important to note that distribution channels have become more efficient with the increased presence of foreign competitors.

Company Profiles

The table below provides information on various large and medium-sized food manufacturing and processing companies in Colombia that are current, or potential, buyers of U.S. agricultural products.

Company	Production	End-Use channels	Production Location	Procurement
Grupo Nutresa	cold cuts, snacks, cookies, chocolate, coffee, pasta and ice cream	wholesaler and retailer	Colombia, U.S., Costa Rica, Dominica Republic, Panama, Peru, Mexico	direct
Grupo Exito	home brands, packaging	retail	Colombia	direct & brokers
Cencosud	home brands, packaging	retail	Colombia	direct & brokers
Colombina	candies and crackers	wholesaler and retailer	Colombia	direct & brokers
Olimpica	home brands, packaging	retail	Colombia	direct & brokers
Alpina Productos Alimenticios	dairy products	wholesaler and retailer	Colombia, Ecuador, Venezuela, U.S.	direct & brokers
Cooperativa Colanta	dairy products	wholesaler and retailer	Colombia	direct & brokers
Harinera del Valle	flour, crackers, candies, pasta	retail	Colombia	direct & brokers
Ingredion	flour, oils, condiments	wholesaler and retailer	Colombia	direct & brokers
Alimentos Polar	soft drinks, flours, oils, butter	wholesaler and retailer	Colombia	direct & brokers
Mimos	ice cream	wholesaler and retailer	Colombia	direct & brokers
Levapan	flour	wholesaler and retailer	Colombia	direct & brokers
Griffith Colombia	food ingredients	food processors and HRI	Colombia	direct & brokers

Sector Trends

Sauces, Dressings and Condiments: There are two main trends in this sub-sector: brand penetration and innovation in products and product packaging. Consumers are buying more branded products based on uniform quality at reasonable prices. In general, Colombian consumers are loyal to traditional brands and demand healthier products like low fat sauces such as canola and olive oil mayonnaise and sauces for Asian food preparations like soy and teriyaki sauce and BB-Q sauce for ribs. The leading company in this category of branded products is Unilever followed by Quila Colombia and Nestlé.

Canned / Preserved Food: This category of food product is increasing in popularity due to urbanization, income shifts and convenience. For canned goods, Colombians are primarily consumers of canned tuna, but the market for other canned / preserved products, such as beans, tomatoes and soups is expanding. The leading canned/preserved food company is Seatech International.

Frozen Processed Food: Urbanization and dual income households have significantly expanded the market for frozen meals, meat, fruits and vegetables. Most preferred products by consumers are frozen processed potatoes, frozen ready to eat meals, frozen pizza and frozen vegetables. There is a cultural stigma that frozen food is less flavorful and has a lower level of quality than fresh alternatives; nevertheless, that misperception is gradually diminishing with expanded promotional events and activities. Market opportunities for these products are mostly for the institutional sector and also target to single-person households.

Dairy: Colombian imports are mostly cream, whey protein, milk powder and other product ingredients, such as casein. Competition in this sector includes Mexico, Bolivia and France. Domestic consumption of dairy products has increased due to promotional efforts that appeal to changes in consumption patterns as a result of urbanization and income shifts. In addition, innovation in packaging has benefited dairy product consumption. Colombian milk production reached 6.4 million liters (1.7 million gallons) in 2016; however, this sector is mostly informal. The dairy manufacturing sector in Colombia includes domestic and multinational companies, such as Nestle, Parmalat and Danone, and domestic brands Alpina, Colanta and Alqueria.

Bakery: Bread consumption per capita is still low at 24 kilograms (50 pounds), compared to other Latin American countries, such as Chile (98 kilograms / 216 pounds), Argentina (82 kilograms / 180 pounds) and Uruguay (55 kilograms / 121 pounds). There is a perception among Colombians that bread is not very nutritional and is related to weight gain. In addition, there is a lack of innovation in the bakery sector, although high-end, gourmet bakeries have increased in popularity where most ingredients are sourced internationally.

Typical bakeries are small, family businesses, which manufacture about 40 percent of bread production throughout the country. There are over 12,000 traditional, small bakeries in Colombia's major cities, according to the latest sector survey. Although only 20 percent is sold by retailers that offer branded and private label products, their market share keeps increasing due to innovation in products and packaging.

The branded bread companies include, Bimbo de Colombia, Productos Ramo, Compañia Manufacturera de Pan (Comapan) and Industrias Santa Clara, among others. These companies produce various types of bread products that differ from traditional bakeries and specialize in buns for hamburgers and hot dogs, in addition to sliced bread, pre-made toast, cakes and brownies. They have launched new products such as artisanal bread and bread with grains and seeds in order to conquer consumers looking for healthier products.

Chilled Processed Food: Chilled meat and poultry products are more in demand by urban consumers. According to Euromonitor, most of the Colombian chilled processed food market is in processed meats or poultry and a minor share for chilled ready-to-eat meals; however preference for

chilled processed food has always been higher than for frozen products. Chinese and Italian preparations are preferred by consumers when buying ready-to-eat-meals decision arises. The Colombian firm Grupo Nutresa leads in this category with 60 percent market share.

Oils and Fats: Colombia is a major producer of palm oil. Olive oil as well as rapeseed oil has shown growth in sales due to consumer increasing preference for healthier oils. Team Foods Colombia leads the sector offering soybean, sunflower and olive oil.

Confectionery: The confectionery industry is an economic engine in Colombia, generating more than 25,000 jobs with a strong history of production and exports. The industry regularly sources raw materials from foreign suppliers, including dairy products and glucose. Although the sector has made efforts in order to innovate and offer a greater variety of candies and chocolates, competition from imports are strong. Two domestic firms, Grupo Nutresa and Colombina, lead the sector over multinationals, such Ferrero, Cadbury and Nestlé.

Beverages: The beverage sector is expanding focus on flavored water and teas, emphasizing vitamin fortified juices with less sugar content. Per capita consumption of non-alcoholic beverages is still low at 131.4 liters (34.71 gallons) per year, slightly lower than neighboring countries. The preferred beverages are sodas, with a per capita consumption of 55 liters (14.53 gallons) per year.

Women are becoming an important niche market for alcoholic beverages, demanding more sophisticated drinks and flavors. Beer is the most highly demanded alcoholic beverage. Per capita beer consumption is about 44 liters per year (11.62 gallons). The extensive growth of wine sales in Colombia in recent years can be attributed to income shifts and urbanization. Wine sales continue to grow but a slower pace due to higher taxes and strict prohibition to drive under alcohol effects. Main wine suppliers still are Argentina and Chile. *Aguardiente* is the national liquor preferred by Colombians and is only produced by monopolistic public/private ventures in specific regions of the country. The primary source of whisky is the United Kingdom, although consumer interest in U.S. whiskeys and bourbons is growing.

SECTION III: COMPETITION

Competition Narrative

The CTPA entered into force in May 2012. This comprehensive trade agreement eliminated tariffs and other barriers to goods and services. Although over 80 percent of U.S. exports of consumer and industrial products to Colombia have become duty-free, the CTPA provided a duty free tariff-rate-quota (TRQ) on certain goods that operate under a first come/first serve basis, except for rice and poultry which are subject to auctions manage by Export Trading Companies. There are significant opportunities for imported, value-added food products and raw materials in Colombia due to shifting consumer preferences. United States competitors for raw materials for processing and value-added products are MERCOSUR, Canada and the European Union and all three have free trade agreements with Colombia.

FY2017 Colombian Food Product Rankings by Country of Import

Product Category Harmonized System Code	Rank	Country	Import Value (million dollars)
Meat And Meat Offal		Total	254
HS 02	1	United States	222
	2	Chile	12
	3	Canada	11
	4	Peru	4
	5	Paraguay	1
		Other countries	4
Dairy Products		Total	119
HS 04	1	United States	52
	2	Bolivia	20
	3	Mexico	16
	4	France	8
	5	Argentina	3
		Other countries	20
Edible Vegetables, Certain Roots And Tubers		Total	187
HS 07	1	Canada	61
	2	United States	51
	3	China	34
	4	Peru	9
	5	Ecuador	7
		Other countries	25
Edible Fruit And Nuts		Total	219
HS 08	1	Chile	134
	2	United States	30
	3	Peru	16
	4	Argentina	8
	5	Italy	7
		Other countries	24
Coffee, Tea, Mate And Spices		Total	46
HS 09	1	Peru	16
	2	Sri Lanka	10
	3	Ecuador	4
	4	India	4
	5	United States	3
		Other countries	9
Milling, Malt And Starches		Total	40
HS 11	1	Chile	19

	2	United States	4
	3	Paraguay	3
	4	Mexico	1
	5	Argentina	1
		Other countries	12
Edible Preparations Of Meat, Fish, Crustaceans, Mollusks HS 16		Total	208
	1	Ecuador	113
	2	Duty Free (Cartagena) ²	44
	3	United States	28
	4	Chile	9
	5	Spain	4
		Other countries	10
Sugars And Sugar Confectionary HS 17		Total	189
	1	Ecuador	45
	2	Brazil	45
	3	Mexico	26
	4	Peru	19
	5	Bolivia	4
		Other countries	50
Cocoa And Cocoa Preparations HS 18		Total	59
	1	United States	19
	2	Ecuador	10
	3	Peru	4
	4	Brazil	4
	5	Argentina	4
		Other countries	18
Preparations Of Cereals, Flour, Starch Or Milk; Bakers' Wares HS 19		Total	192
	1	Mexico	35
	2	United States	28
	3	Peru	24
	4	Chile	22
	5	Ireland	13
		Other countries	70
Preparations Of Vegetables, Fruit, Nuts HS 20		Total	134
	1	United States	36
	2	Chile	22
	3	Belgium	20
	4	Mexico	8
	5	Thailand	6
		Other countries	42

Miscellaneous Edible Preparations HS 21		Total	365
	1	Brazil	115
	2	United States	96
	3	Mexico	39
	4	Malaysia	13
	5	Uruguay	10
		Other countries	92
Beverages, Spirits And Vinegar HS 22		Total	517
	1	FTZ - FEMSA	173
	2	United States	64
	3	United Kingdom	43
	4	Mexico	43
	5	Chile	32
		Other countries	162
Albuminoidal Substances; Modified Starches; Glues; Enzymes HS 35		Total	133
	1	United States	43
	2	Brazil	19
	3	Mexico	12
	4	China	10
	5	Denmark	8
		Other countries	41

Source: Global Trade Atlas

SECTION IV: BEST PRODUCT PROSPECTS

U.S. Agricultural Product Market Potential

Colombian Gross Domestic Product (GDP) grew at 2 percent in 2016, slower than previous year growth rates, but still higher than other Latin American economies. Colombia is already an important market for America's farmers and ranchers. In FY2017, the United States exported \$2.6 billion of agricultural products to Colombia. Top U.S. agricultural exports were corn, soybean meal, soybeans, wheat and pork and pork products.

Colombia is a fast growing market for value-added food products. Surveyed retailers and food importers feel there is significant potential for new products in all food categories. Healthy and ethnic food categories are especially new and fast growing. Wines and gourmet products are penetrating the market with excellent results. Organic food products are a new trend and retailers are searching for the best suppliers.

The following products categories represent the major export opportunities and some emerging opportunities for U.S. food products to Colombia with zero duties or reduced duties:

² Cartagena free trade zone

Bulk Commodities	Intermediate Products	Consumer-Oriented
Corn (up to quota)	Soybean meal	Milk powder
Rice (up to quota)	Vegetable oil	Cheese
Soybeans	Potato flakes	Milk albumin
Lentils	Yeasts	Duck
Peanuts	Sugars and sweeteners	Turkey
Dry beans (up to quota)	Soybean oil	Preserved vegetables
Wheat	Glues based starch	Bone-in beef cuts
Chickpeas		Bovine livers
		Tree nuts
		Vinegar
		Soy sauce
		Processed fruit
		Sugar confectionery
		Tea
		Cranberry juice

Below is the CTPA TRQ schedule according to agricultural product or bulk commodity:

Product	Base Duty	TRQ (MT) 2018	TRQ Annual Increase	Phase Out Period	Safeguard Trigger Level
Yellow Corn	25%	2,814,201	5.0%	12 years	
White Corn	20%	182,923	5.0%	12 years	
Rice	80%	102,878	4.5%	19 years (6 of grace)	120% of TRQ
Sorghum	25%	28,142	5.0%	12 years	
Dried Beans	40.2%	21,106	5.0%	10 years	130% of TRQ
Animal Feeds	10%-25%	260,314	5.0%	12 years	
Pet Food	28%	13,711	8.0%	8 years	
Chicken Leg Quarters (fresh, chilled, frozen)	164.4%	34,214	4.0%	18 years (5 years of grace)	130% of TRQ
Processed chicken leg quarters	70%			18 years (10 years of grace)	
Spent Fowl	20%	492	3.0%	18 years	130% of TRQ
Standard Quality Beef	51.2%	2,814	5.0%	10 years	140% of TRQ
Variety Meats	51.2%	6,401	5.5%	10 years	
Pork Meat*	30%	Unlimited		5 years	
Crude Soybean Oil	24%	39,478	4.0%	10 years	
Glucose	28%	14,071	5.0%	10 years	
Milk Powder	33%	9,744	10.0%	15 years	

Cheese	20%-33%	4,092	10.0%	15 years	
Yogurt	20%	195	10.0%	15 years	
Butter	33%	975	10.0%	11 years	
Processed Dairy Products	20%	1,949	10.0%	15 years	
Ice Cream	20%	584	10.0%	11 years	
Maple Syrup*	5%	Unlimited		5 years	

*As of 2017, pork meat and maple syrup are free of duty as a result of the CTPA TRQ phase-out.

For further information please check the following links:

<http://www.ustr.gov/trade-agreements/free-trade-agreements/colombia-fta/final-text>

RICE - <http://www.col-rice.org/>

POULTRY - <http://www.colom-peq.org/>

SECTION V: POST CONTACT AND FURTHER INFORMATION

RELATED REPORTS

Check following link:

<http://gain.fas.usda.gov/Pages/Default.aspx>

POST CONTACT INFORMATION

Office of Agricultural Affairs
U.S. Embassy, Bogotá, Colombia
Carrera 45 No. 24B-27
Bogotá, Colombia

Telephone: (57-1) 275-4622
Fax: (57-1) 275-4525
e-mail : AgBogota@fas.usda.gov

USDA Animal Plant Health Inspection Service (APHIS)
U.S. Embassy, Bogotá, Colombia
Phone: (57-1) 275-4572
Fax: (57-1)275-4571
e-mail: Roberto.Guzman@aphis.usda.gov

COLOMBIAN GOVERNMENT CONTACTS

Phytosanitary and Zoosanitary Requirements:

Ministry of Agriculture and Rural Development
Colombian Institute for Agriculture and Livestock (ICA)
Avenida Calle 26 # 85b – 09

Bogotá, Colombia

Juan Andres Angulo Mosquera
Deputy Manager Animal Health Protection
ICA -Instituto Colombiano Agropecuario
Avenida Calle 26 # 85b – 09
Bogotá, Colombia
Tel. (57-1) 332-3736 ext. 1201
e-mail: subgerencia.pecuaria@ica.gov.co

Marlon Lucio Torres Burgos
Deputy Manager Plant Health Protection
ICA -Instituto Colombiano Agropecuario
Avenida Calle 26 # 85b – 09
Bogotá, Colombia
Tel: (57-1) 332-3754 ext.1301
E-mail: subgerencia.agricola@ica.gov.co

Food Product Registration and Health Permits:

Ministry of Health and Social Protection
National Institute for the Surveillance of Food and Medicine (INVIMA)
Director Division of Food and Alcoholic Beverages
Sergio Alfonso Troncoso
Carrera 10 No 64 -28
Bogotá, Colombia
Phone: (57-1) 294-8700 Ext. 3920
E-mail: invimasal@invima.gov.co