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Colombia

Food Processing Ingredients

Food Processing Sector Report 2013

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Report Highlights:

Trade opportunities for U.S. agricultural products to Colombia continue to grow 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 high demand of the growing food and beverage processing industry.

Post:
Bogota

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SECTION I: MARKET SUMMARY

Colombia is the third largest consumer of U.S. agricultural products in South America after Venezuela and Brazil. In Fiscal Year (FY) 2013, U.S. agricultural exports to Colombia were valued at US\$1.4 billion. Trade in U.S. agricultural products to Colombia has expanded as a result of the implementation of the CTPA. 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) and the European Union. Colombia is awaiting final legislative and judicial approvals of the FTA with South Korea and is currently negotiating FTAs with Costa Rica, Panama, and a larger trade bloc, the Pacific Alliance, which includes Chile, Peru and Mexico.

With an average 4.7 percent Gross Domestic Product (GDP) in the last ten years, and a rising GDP per capita, many 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 and a growing number of fast food chains and restaurants to support urbanization and more dining outside the home. This has impacted the food industry sector dramatically with food manufacturers desperately seeking the raw materials to meet the demand of the changing consumer tastes and preferences. Colombia is a net importer of many food processing ingredients and trade opportunities abound.

In recent years, Colombia has been beset with various political, economic and weather phenomena that have negatively impacted production, making sourcing difficult for the food industry. A relaxation of trade restrictions between Colombia and Venezuela resulted in a significant increase of Colombian agricultural products entering Venezuela, up 54 percent in 2013. This creates significant opportunities for U.S. raw materials and food ingredients to support the growing Colombia-Venezuela trade relationship. Venezuelan imports of Colombian processed products include chocolate confectionary products, grits and starch grits and vegetable oils and its byproducts.

There is a growing domestic demand for higher quality confectionary products and ingredients are needed to complement a large cocoa producing industry to develop better quality chocolates and other candies. The production in chocolates is burdened by very volatile domestic prices of milk, cocoa and sugar, which have risen in recent years. In general, Colombia imports about 15 percent of glucose.

Although Colombia is a major producer and consumer of palm oil, Colombia imports significant quantities of the inputs needed for the fats and oils industry. In a given year, the fats and oils industry imports about 32 percent of unrefined soybean oils, 92 percent of unrefined sunflower oil

and 87 percent of other unrefined oil seeds. For the milling, bakery and starches sector, sales of processed crackers, cookies, biscuits and chips increased in 2012 despite the high prices of raw materials like cocoa, sugar and processed fruit. On the other hand, this sector benefited from lower prices of wheat and by 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. In 2012, the milling industry sourced 99 percent of raw materials from foreign suppliers, importing 71 metric tons of wheat flour in FY2013.

The feed sector is a key market for grains and oilseeds and continues to source most needs from foreign suppliers. The United States was a major supplier of feed needs for Colombia, but has lost significant market share to MERCOSUR countries, notably Argentina. The CTPA will improve opportunities for trade in coarse grains and oilseeds as Colombian buyers continue to seek high quality feed ingredients at reasonable prices. With a bumper U.S. corn harvest in the fall of 2013, prices have fallen dramatically, turning Colombian buyers towards the United States. In 2012, to meet domestic feed demand, Colombia imported significant quantities of coarse grains, oilseeds and meals, sourcing 85 percent of corn, 90 percent of soybeans, and 100 percent soybean meals from foreign suppliers.

Major Trends

Colombia is the third most populated country in Latin America after Brazil and Mexico. Of the 47 million inhabitants, about 75 percent reside in urban areas. Colombia is atypical of Latin America with decentralized urban centers and four cities with over one million residents: Bogota, Medellin, Cali and Barranquilla. 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. For example, CENCOSUD of Chile recently purchased the Carrefour-Colombia subsidiary, establishing the retail chains Jumbo and Metro in the major Colombian urban centers. The U.S. retail chain Pricesmart has also established a presence in Colombia opening three stores – two in Cali and one in Barranquilla, in the past two years. Pricesmart will be expanding to Medellin and Bogota in the near future.

This retail transformation has resulted in Colombian consumers becoming more susceptible to brand identities. According to a recent consumer survey by Raddar Consumer Knowledge Group, about 80 percent of Colombian households associate with specific food brands that are regularly included in shopping lists. The following branded products are increasing in retail market share: canned/processed food, dried processed food, frozen processed food, meal solutions, oils and fats, ready-to-eat meals, sauces, dressings and condiments.

Demand for healthy foods is also increasing after a survey concluded that obesity is a growing trend with approximately 51 percent of Colombians being overweight or obese. As a response, the

Government of Colombia (GOC) launched healthy lifestyle campaigns, increasing the exposure to healthier food alternatives. Despite the campaign, convenience food is a fast growing industry with increasingly more U.S. fast food chains establishing a presence Colombia. In addition, Colombian consumers are demanding more innovation in packaging, flavors and nutritional benefits. Smaller packaging is an increasing trend for different kinds of food with people interested in more economical, single portions.

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

	CY 2010	CY 2011	CY 2012	Change 2012/2011
Bakery	1,161.9	1,170.9	1,147.2	-2.0%
Canned / Preserved Food	77.6	79.7	81.1	1.8%
Chilled Processed Food	62.6	64.4	67.5	4.8%
Confectionery	54.2	55.9	57.2	2.3%
Dairy	2,063.5	2,051.7	2,088.4	1.8%
Dried Processed Food	1,237.7	1,260.4	1,277.5	1.4%
Frozen Processed Food	13.7	13.9	14.0	0.7%
Ice Cream	60.6	62.3	64.1	2.9%
Oils and Fats	468.4	481.2	487.0	1.2%
Pasta	133.8	141.1	144.6	2.5%
Sauces, Dressings and Condiments	54.4	55.8	57.3	2.7%
Prepared Soups	3.2	3.3	3.4	3.0%
Spreads	20.4	20.3	20.4	0.5%
Sweet and Savoury Snacks	75.0	81.6	90.2	10.5%
Meal Solutions	226.2	232.3	238.6	2.7%

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 for 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, such as bread, compared to other Latin American markets.
Colombia is the second 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.
A strong Colombian peso against the U.S. dollar is favoring U.S. exports.	Imported food product registrations are costly, ranging from \$1,000 to \$2,300 depending on the product.
The growth of tourism and the hotel and	There is a cultural misperception that frozen

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.	products are unhealthy and lack quality.
The growing lower and middle income population , specifically the 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 extremely poor infrastructure.
Market opportunities for health foods and organic products are expanding after surveys showed that 51% of Colombians are overweight or obese and the GOC is implementing healthy living campaigns.	Cold chain is deficient and Colombians have no clear understanding of this need to maintain product quality.

SECTION II: MARKET ENTRY

Entry Strategy

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

- Competition is based on quality, price and service;
- Innovative marketing strategies are imperative in order to penetrate the market;
- Social 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, Expovinos, Agrofuturo, and also be part of trade delegations;
- Many Colombian companies' representatives visit trade shows in the United States, such as Food and Beverage of the Americas and Fancy Foods Shows and these 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 and food processing industry 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
Nutresa Group	cold cuts, snacks, cookies, chocolate, coffee, pasta and ice cream	wholesaler and retailer	Colombia, U.S., Costa Rica, Dominica Republic, Panama, Peru, Mexico	Direct
Exito Group	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
Industrias del Maiz	flour, oils, condiments	wholesaler and retailer	Colombia	Direct & Brokers
Alimentos Polar S.A	soft drinks, flours, oils, butter	wholesaler and retailer	Colombia	Direct & Brokers
Mimos S.A.	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
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Sector Trends

Sauces, Dressings and Condiments: There are two main trends in this sub-sector: brand penetration and innovation in product and 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. The leading company in this category of branded products is Unilever followed by Quala Colombia.

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. In 2012, sales of frozen processed food slightly grew at 3 percent. 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: Colombia is the fourth largest dairy producer in Latin America. Imports are mostly whey protein and milk cream concentrate containing added sweetening and other product ingredients, such as casein. Competition in this sector includes Argentina, Chile and Ecuador. 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. Milk production reached 6 million liters in 2012; 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 is common in Colombia; nevertheless, consumption is low compared to other Latin American countries at 23 kilograms per capita. 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 government survey on the sector. Only 20 percent is sold by retailers that offer branded products. The branded bread companies include, Bimbo de Colombia, Colombiana de Pan (Colpan), Compañía Manufacturera de Pan (Comapan), Comercializadora de Pan, Reposteria y Confiteria (Santa Clara), Nestle and Nutresa. 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.

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. Nutresa leads in this category with 60 percent market share.

Oils and Fats: Colombia is a major producer of palm oil, and thus a major consumer of palm cooking oil. Other vegetable oils and fats have shown consistent growth in the recent years. Vegetable and oil seed derived oils comprise 91 percent of the import market share, followed by margarines (3%) and cooking fats (2.6%).

Confectionery: The confectionery industry is an economic engine in Colombia, generating more than 25 thousand 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. Nutresa leads the sector, followed by Colombina.

Beverages: The beverage sector is expanding focus on flavored water and teas, emphasizing vitamin fortified juices with less sugar content. Regarding alcoholic beverages, women are becoming an important new market niche, demanding more sophisticated drinks and flavors. Beer remains like the most highly demanded alcoholic beverage and consumption is satisfied through domestic production and imports. The growth of wine sales in recent years is nothing short of remarkable, due to income shifts and urbanization. U.S. wine imports have increased dramatically after CTPA implementation due to zero tariffs. *Aguardiente* is the national liquor in Colombia and is only produced by domestic public/private ventures in specific regions of Colombia. The primary source of whiskeys is the United Kingdom.

SECTION III: COMPETITION

Competition Narrative

The CTPA entered into force on May 15, 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 managed 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.

Colombia grants preferential treatment to products coming from the Andean Community of Nations (CAN) due to agreements signed in recent years with member countries: Bolivia, Peru and Ecuador. Colombia currently has free trade agreements with Canada, Chile, Mexico, the Northern Triangle of

Central America (El Salvador, Guatemala and Honduras), MERCOSUR, which includes Argentina, Brazil, Paraguay and Uruguay, the European Free Trade Association (Switzerland, Liechtenstein, Norway and Iceland), the United States, Nicaragua, Cuba and the European Union.

Colombia has negotiated free trade agreements with South Korea, Costa Rica, Israel and Panama, but these treaties are still pending for approval. Colombia is currently negotiating free trade agreements with Turkey, Japan and the Pacific Alliance (Chile, Colombia, Mexico and Peru).

FY 2013 Colombian Food Product Rankings by Country of Import

Product Category Harmonized System Code	Rank	Country	Import Value (US\$ Millions)
Meat And Meat Offal		Total	173.72
HS 02	1	United States	103.22
	2	Chile	35.36
	3	Canada	26.53
	4	Peru	5.34
	5	Argentina	2.12
		Other countries	1.15
Dairy Products		Total	67.40
HS 04	1	United States	30.15
	2	Chile	12.45
	3	Bolivia	7.32
	4	Argentina	6.39
	5	Uruguay	3.22
		Other countries	7.88
Edible Vegetables, Certain Roots And Tubers		Total	166.34
HS 07	1	Canada	66.55
	2	China	30.56
	3	Peru	22.67
	4	United States	14.13
	5	Ecuador	12.41
		Other countries	20.01
Edible Fruit And Nuts		Total	258.78
HS 08	1	Chile	162.55
	2	United States	55.19
	3	Peru	14.14
	4	Argentina	5.10
	5	Spain	4.24
		Other countries	17.57
Coffee, Tea, Mate And Spices		Total	100.89
HS 09	1	Peru	55.86
	2	Ecuador	25.95
	3	Sri Lanka	7.59

	4	Brazil	3.15
	5	India	2.15
		Other countries	6.19
Milling, Malt And Starches HS 11		Total	24.64
	1	United States	4.45
	2	Chile	3.53
	3	Thailand	2.34
	4	Brazil	1.86
	5	Netherlands	1.74
		Other countries	10.72
Edible Preparations Of Meat, Fish, Crustaceans, Mollusks HS 16		Total	240.41
	1	Ecuador	110.25
	2	Duty Free (Cartagena)	72.04
	3	United States	24.28
	4	Chile	14.94
	5	Peru	8.32
		Other countries	10.58
Sugars And Sugar Confectionary HS 17		Total	227.47
	1	Brazil	114.78
	2	Bolivia	35.80
	3	United States	16.35
	4	Mexico	12.87
	5	Peru	11.74
		Other countries	35.93
Cocoa And Cocoa Preparations HS 18		Total	59.82
	1	United States	14.67
	2	Ecuador	11.13
	3	Brazil	9.64
	4	Mexico	4.58
	5	Italy	3.08
		Other countries	16.72
Preparations Of Cereals, Flour, Starch Or Milk; Bakers' Wares HS 19		Total	192.33
	1	Chile	44.32
	2	Mexico	42.69
	3	Peru	22.64
	4	United States	20.03
	5	Brazil	7.85
		Other countries	54.80
Preparations Of Vegetables, Fruit, Nuts HS 20		Total	118.94
	1	United States	43.44
	2	Chile	24.74

	3	Mexico	8.48
	4	Argentina	6.10
	5	Netherlands	6.03
		Other countries	30.15
Miscellaneous Edible Preparations HS 21		Total	297.30
	1	United States	111.81
	2	Brazil	85.80
	3	Mexico	18.20
	4	Chile	11.47
	5	China	10.74
		Other countries	59.27
Beverages, Spirits And Vinegar HS 22		Total	296.10
	1	United Kingdom	48.35
	2	Cuba	30.15
	3	Ecuador	29.01
	4	Chile	27.25
	5	Peru	25.73
		Other countries	135.61
Albuminoidal Substances; Modified Starches; Glues; Enzymes HS 35		Total	127.50
	1	United States	31.60
	2	Brazil	20.24
	3	Mexico	16.91
	4	Denmark	9.28
	5	China	6.76
		Other countries	42.72

Source: Global Trade Atlas

SECTION IV: BEST PRODUCT PROSPECTS

U.S. Agricultural Product Market Potential

With above 4 percent average GDP growth and a rising per capita income there is an increased demand for fast food restaurants and consumer-ready food products. Also, the strong Colombian peso against a weaker U.S. dollar has reduced the price of foodstuffs imported from the United States. Colombia is already an important market for America's farmers and ranchers. In FY2013, the United States exported \$1.4 billion of agricultural products to Colombia. Top U.S. agricultural exports were wheat, feeds and fodders, soybeans, and soybean meal.

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 product categories represent the major export opportunities, and emerging opportunities, for U.S. food products with zero duties entering Colombia:

Bulk Commodities	Intermediate Products	Consumer-Oriented
wheat	soybean meal	pastry and dessert mixes
barley	soybean oil	spices
dried beans and lentils	DDGS	condiments (except mayonnaise)
cotton	vegetable oils	frozen vegetables
soybeans	feeds and fodders	premium beef cuts
peanuts	wheat flour	processed turkey
		beer
		wine
		nuts
		soup preparations
		lamb
		fresh fruits
		healthy food products
		processed vegetables

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

Product	Base Duty	TRQ (MT) 2014	TRQ Annual Increase	Phase Out Period	Safeguard Trigger Level
Yellow Corn	25%	2,315,250	5.0%	12 years	
White Corn	20%	150,491	5.0%	12 years	
Rice	80%	86,270	4.5%	19 years (6 of grace)	120% of TRQ
Sorghum	25%	23,153	5.0%	12 years	
Dried Beans	40.2%	17,364	5.0%	10 years	130% of TRQ
Animal Feeds	10%-25%	214,161	5.0%	12 years	
Pet Food	28%	10,078	8.0%	8 years	
Chicken Leg Quarters	70%	29,246	4.0%	18 years (10 of grace)	130% of TRQ
Poultry Parts	164.4%			18 years (5 of grace)	
Spent Fowl	20%	437	3.0%	18 years	130% of TRQ
Standard Quality Meat	51.2%	2,315	5.0%	10 years	140% of TRQ
Variety Meats	51.2%	5,167	5.5%	10 years	
Pork Meat	30%	Unlimited		5 years	
Crude Soybean Oil	24%	33,746	4.0%	10 years	
Glucose	28%	11,576	5.0%	10 years	

Milk Powder	33%	6,655	10.0%	15 years	
Cheese	20%-33%	2,795	10.0%	15 years	
Yogurt	20%	133	10.0%	15 years	
Butter	33%	666	10.0%	11 years	
Processed Dairy Products	20%	1,331	10.0%	15 years	
Ice Cream	20%	399	10.0%	11 years	
Maple Syrup	5%	Unlimited		5 years	

For further information please check the following link:

<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>

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