

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT POLICY

Required Report - public distribution

Date: 12/31/2012

GAIN Report Number:

Colombia

Food Processing Ingredients

Food Processing Sector Report 2012

Approved By:

Joseph Lopez, Agricultural Counselor

Prepared By:

Anthony J. Gilbert, Agricultural Attaché

Ana Maria Salinas, Agricultural Marketing Specialist

Report Highlights:

Trade opportunities for U.S. agricultural products to Colombia have expanded as a result of the implementation of the U.S.-Colombia Trade Promotion Agreement (TPA). 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

Author Defined:

SECTION I: MARKET SUMMARY

Colombia is the second largest consumer of U.S. agricultural products in South America after Venezuela. In 2012, U.S. agricultural exports to Colombia were valued at US\$843 thousand. Trade opportunities for U.S. agricultural exports to Colombia have expanded as a result of the implementation of the U.S.-Colombia TPA. Prior to TPA implementation, Colombia had high import duties for U.S. agriculture products limiting opportunities for U.S. exporters. Most of those products are now duty-free. Colombia is eager for access to other markets and has signed Free Trade Agreements (FTAs) with various countries and trade blocs, such as Canada and the South American Common Market (MERCOSUR). A recently negotiated FTA with the European Union will be implemented in early 2013.

Consistent 5 percent Gross Domestic Product (GDP) growth with a rising GDP per capita has moved many out of poverty and into the low and middle income classes. This income shift has resulted in more household disposable income and changes in eating patterns, such as an increase in demand for ready-to-eat products and more dining out. This has impacted the food industry sector dramatically, resulting in food manufacturers desperately seeking the raw materials to meet the demand of fast changing consumer tastes and preferences. Colombia is a net importer of many food processing ingredients and 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. The Colombian beef industry was affected by the closure of trade with Venezuela and an abnormally long rainy season. The poultry sector was impacted by high prices of raw feed materials, significantly increasing production costs and shrinking producer/manufacturer margins. The Government of Colombia (GOC) estimates that 5 percent of the raw materials needed by the poultry industry were imported in recent years. In general, Colombia imported 8 percent of its poultry meat needs, 1 percent of casings for sausages, 30 percent of tuna and 5 percent of shellfish.

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 and sugar, which have risen in recent years. In general, Colombia imports about 15 percent of glucose needs and, in 2011, imported 449,000 liters of milk and 232 thousand metric tons of milk powder.

Although Colombia is a major producer and consumer of palm oil, Colombia is a net importer of other fats and oils, importing about 32 percent of soybean oils, 92 percent sunflower oil and 87 percent of other oil seeds. For the milling, bakery and starches sector, sales of processed crackers, cookies and chips increased in 2011 despite the high prices of wheat, maize and soybeans. In 2011,

the milling industry sourced 99 percent of raw materials from foreign imports. In addition, the bakery industry imported 1,200 metric tons of wheat flour.

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 since lost significant market share to MERCOSUR countries, notably Argentina. The U.S.-Colombia TPA will improve opportunities for trade in coarse grains and oilseeds as Colombian buyers continue to seek high quality feed ingredients at reasonable prices. In 2011, 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 46 million inhabitants, about 75 percent reside in urban areas. Colombia is atypical of Latin America with decentralized urban centers and five cities with over one million residents: Bogota, Medellin, Cali, Barranquilla, and Bucamaranga. 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 chains opening new stores, of varying sizes, at intense rates.

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. This resulted in the GOC launching healthy living campaigns, increasing the exposure to healthier food alternatives. 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.

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

	2011	2012 (f)	% Change
Bakery	240.0	245.7	2.4%
Canned / Preserved Food	6.6	6.8	3.0%
Chilled Processed Food	17.2	18.0	4.7%
Confectionery	1.8	1.8	0.0%
Dried Processed Food	712.9	727.5	2.0%
Frozen Processed Food	45.9	46.5	1.3%
Ice Cream	2.5	2.6	4.0%

Oils and Fats	181.3	188.8	4.1%
Pasta	9.1	9.5	4.4%
Ready-to-eat Meals	0.5	0.5	0.0%
Sauces, Dressings and Condiments	11.9	12.2	2.5%
Prepared Soups	0.1	0.1	0.0%
Spreads	0.9	0.9	0.0%
Sweet and Savory Snacks	2.6	2.6	0.0%
Meal Solutions	82.2	84.0	2.2%

Source: Euromonitor

(f): Forecast

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

Advantages	Challenges
The U.S.-Colombia TPA 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 \$500 to \$2,300 depending on the product
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 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
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

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, good quality at reasonable prices. It is estimated that market share for branded products in this category are up 9 percent this year. The leading company in this category of branded products is Unilever, with 26 percent market share, followed by Quila Colombia (15%).

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 2011, sales of frozen, ready-to-eat meals grew 30 percent, with increased sales for frozen pizza, frozen beef and frozen vegetables as well.

There is a cultural stigma for frozen food is less flavorful and lower quality than fresh alternatives, nevertheless, that misperception is gradually diminishing with expanded promotional events and activities that invite people to enjoy the benefits of frozen food. McCain leads this sector with a market share of 24 percent.

Dairy: Colombia is the fourth largest milk product producer in Latin America. Imports are mostly 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 is mostly informal. According to the Colombian Agency for Export Promotion, dairy sales will reach US\$3.5 billion in 2011. The dairy product sector in Colombia includes domestic and multinational companies that manufacture and export products, 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 24 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 business, which manufacture about 40 percent bread production throughout the country. Only 20 percent is sold by retailers, offering 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 all kinds of bread 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 with urban consumers. According to Euromonitor, 91 percent of the Colombian chilled processed food market is some form of processed meat or poultry and about seven percent are chilled, ready-to-eat meals. Nutresa leads in this category with 72 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 market share, followed by margarines (3%) and cooking fats (2.7%).

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 is strong. Nutresa leads the sector with 60 percent market share, followed by Colombina (8%).

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 TPA 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 importer of whiskeys is the United Kingdom.

SECTION III: COMPETITION

Competition Narrative

The U.S.–Colombia TPA 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 TPA 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.

Colombia grants preferential treatment to products coming from the Andean Community of Nations 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, and the European Free Trade Association (Switzerland, Liechtenstein, Norway and Iceland) and the United States.

Colombia has negotiated a free trade agreement with the European Union (EU), which is pending approval from the Colombian legislature. The Colombia-EU free trade agreement will likely be implemented in early 2013. Colombia is also negotiating free trade agreements with South Korea, Turkey, Panama, Costa Rica, Israel and Japan.

2011 Colombian Food Product Rankings by Country of Import

Product Category Harmonized System Code	Rank	Country	Import Value (US\$ Millions)
Meat And Meat Offal HS 02		Total	76.56
	1	United States	31.75
	2	Chile	23.02
	3	Canada	12.63
	4	Peru	4.85
	5	Argentina	2.44
		Other countries	1.87

Dairy Products HS 04		Total	47.73
	1	Argentina	18.39
	2	Chile	13.40
	3	Uruguay	5.38
	4	United States	3.33
	5	Bolivia	1.84
		Other countries	5.38
Edible Vegetables, Certain Roots And Tubers HS 07		Total	181.83
	1	Canada	58.84
	2	Peru	34.12
	3	China	33.20
	4	Ecuador	14.80
	5	United States	12.76
		Other countries	28.12
Edible Fruit And Nuts HS 08		Total	212.65
	1	Chile	132.93
	2	United States	37.43
	3	Peru	10.02
	4	Ecuador	8.72
	5	Spain	5.50
		Other countries	18.07
Coffee, Tea, Mate And Spices HS 09		Total	188.78
	1	Ecuador	86.14
	2	Peru	85.57
	3	Sri Lanka	7.35
	4	India	2.61
	5	China	1.43
		Other countries	5.68
Milling, Malt And Starches HS 11		Total	17.56
	1	United States	6.49
	2	Chile	2.87
	3	China	1.37
	4	Netherlands	1.11
	5	Mexico	1.04
		Other countries	4.67
Edible Preparations Of Meat, Fish, Crustaceans, Mollusks HS 16		Total	215.69
	1	Ecuador	92.20
	2	Duty Free (Cartagena)	57.49
	3	United States	26.26
	4	Peru	14.36
	5	Chile	12.99
		Other countries	12.40

Sugars And Sugar Confectionary HS 17		Total	175.19
	1	Brazil	120.30
	2	United States	9.40
	3	Ecuador	7.73
	4	China	6.72
	5	Peru	6.28
		Other countries	24.75
Cocoa And Cocoa Preparations HS 18		Total	90.18
	1	Ecuador	30.08
	2	China	17.58
	3	Peru	16.67
	4	Brazil	6.38
	5	United States	4.59
		Other countries	14.87
Preparations Of Cereals, Flour, Starch Or Milk; Bakers' Wares HS 19		Total	147.84
	1	Mexico	38.26
	2	Chile	33.33
	3	Peru	19.69
	4	Argentina	13.05
	5	United States	7.91
		Other countries	35.60
Preparations Of Vegetables, Fruit, Nuts HS 20		Total	82.57
	1	Chile	26.41
	2	United States	17.18
	3	Argentina	7.51
	4	Mexico	6.92
	5	Netherlands	6.04
		Other countries	18.52
Miscellaneous Edible Preparations HS 21		Total	212.15
	1	United States	72.48
	2	Brazil	66.48
	3	Mexico	13.45
	4	Chile	8.91
	5	Uruguay	7.20
		Other countries	43.63
Beverages, Spirits And Vinegar HS 22		Total	182.34
	1	United Kingdom	39.28
	2	Ecuador	25.43
	3	Chile	21.30
	4	Bolivia	16.25
	5	Argentina	11.74
		Other countries	68.34

Albuminoidal Substances; Modified Starches; Glues; Enzymes		Total	109.58
HS 35	1	United States	28.66
	2	Mexico	15.70
	3	Brazil	14.10
	4	Denmark	6.34
	5	France	6.32
		Other countries	38.46

Source: Global Trade Atlas

SECTION IV: BEST PRODUCT PROSPECTS

U.S. Agricultural Product Market Potential

Consistent 5 percent GDP growth and a rising per capita income have lead to increased demand for fast food restaurants and ready-to-eat 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 2011, the United States exported \$1.2 billion of agricultural products to Colombia. Top U.S. agricultural exports were wheat, corn, cotton, 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 products categories represent the major export opportunities and some emerging opportunities for U.S. food products to Colombia with zero duties:

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

Below is the U.S.-Colombia TPA TRQ schedule according to agricultural product or bulk commodity:

U.S.-Colombia TPA TRQs:

Product	Base Duty	TRQ (MT) First Year	TRQ Annual Increase	Phase Out Period	Safeguard Trigger Level
Yellow Corn	25%	2,100,000	5%	12 years	
White Corn	20%	136,500	5%	12 years	
Rice	80%	79,000	4.5%	19 years (6 of grace)	120% of TRQ
Sorghum	25%	21,000	5%	12 years	
Dried Beans	40.2%	15,750	5%	10 years	130% of TRQ
Animal Feeds	10%-25%	194,250	5%	12 years	
Pet Food	28%	8,640	8%	8 years	
Chicken Leg Quarters	70%	27,040	4%	18 years (10 of grace)	130% of TRQ
Poultry Parts	164.4%			18 years (5 of grace)	
Spent Fowl	20%	412	3%	18 years	130% of TRQ
Standard Quality Meat*	51.2%	2,100	5%	10 years	140% of TRQ
Variety Meats	51.2%	4,642	5.5%	10 years	
Pork Meat	30%	Unlimited		5 years	
Crude Soybean Oil	24%	31,200	4%	10 years	
Glucose	28%	10,500	5%	10 years	
Milk Powder	33%	5,500	10%	15 years	
Cheese	20%-33%	2,310	10%	15 years	
Yogurt	20%	110	10%	15 years	
Butter	33%	550	10%	11 years	
Processed Dairy Products	20%	1,100	10%	15 years	
Ice Cream	20%	330	10%	11 years	
Syrups	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>

POST CONTACT INFORMATION

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

Joseph Lopez
Agricultural Counselor

Anthony J. Gilbert
Agricultural Attaché

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

Dr. Peter Fernandez
USDA Animal Plant Health Inspection Service (APHIS) Regional Manager
(on TDY to APHIS Washington until February 2013)

Phone: (57-1) 275-4572
Fax: (57-1) 275-4571
e-mail: Peter.Fernandez@aphis.usda.gov

COLOMBIAN GOVERNMENT CONTACTS

Phytosanitary and Zoosanitary Requirements:

Ministry of Agriculture and Rural Development
Colombian Institute for Agriculture and Livestock (ICA)
Carrera 41 No. 17-81
Bogotá, Colombia

Olga Lucia Diaz
Deputy Manager Animal Health Protection
ICA -Instituto Colombiano Agropecuario
Carrera 41 No. 17-81
Bogotá, Colombia
Tel. (57-1) 332-3736 ext. 1201
e-mail: subgerencia.pecuaria@ica.gov.co

Carlos Alberto Soto
Deputy Manager Plant Health Protection

ICA -Instituto Colombiano Agropecuario
Carrera 41 No. 17-81
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)
Division of Food and Alcoholic Beverages
Harry Alberto Silva
Carrera 68D # 17-21 Zona Industrial
Bogotá, Colombia
Phone: (57-1) 294-8700 Ext. 3920
E-mail: invimasal@invima.gov.co