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## Colombia

### Food Service - Hotel Restaurant Institutional

#### Annual HRI

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**Report Highlights:**

The restaurant sector sales in 2009 are estimated at \$3.4 billion compared to \$2.4 billion in 2007. The hotel sector occupation in 2008 was 54.6% and it is estimated that in 2010 it will reach 58%, although it may drop some points due to the heavy rains in the country that prevent the visitors to move around the country. It is also remarkable the number of new hotel chains entering the country.

**Post:**  
Bogota

## **Executive Summary:**

### **I. Market Summary**

Colombia is the main purchaser of U.S. agricultural products in South America and continues to wait for the ratification of the Colombian Trade Promotion Agreement (CTPA), although Colombia is looking into other markets in case the CTPA with the United States is not ratified in the near future. The longer the CTPA takes to be ratified the longer the U.S. agricultural exports will be in disadvantaged vis-à-vis its competitors.

The restaurant sector grew in sales from 2007 to 2010, 41.6%. There are 64,000 restaurants in Colombia and sales in 2009 are estimated at \$3.4 billion compared to \$2.4 billion in 2007. In 2005, the sector represented 1.9% of the GDP and estimates in 2010 indicate that it represents the 2.2% the GDP. Colombia has high import duties for processed foods; around 20%, which is an important trade barrier to take into consideration. The Government of Colombia has revised its import tariffs this year and as of November tariffs for most processed food products were reduced 5%.

Regarding the hotel sector, COTELCO reports that by December 2008 there were 1,599 hotels operating in Colombia with a total of 58,824 rooms available; occupation of 54.6% and sales of \$1.8 billion. Estimates for 2010 indicate that there are 1,608 hotels in Colombia with 59,114 rooms available and occupation of 58%. Occupation in last trimester of 2010 may drop down due to the heavy rains in the country that prevents visitors to move around the country.

### **Author Defined:**

#### **Restaurants and Food Service Sector**

ACODRES estimates that there are 64,000 restaurants in Colombia and 30% are considered formal restaurants. Colombia's gastronomy is very attractive for tourists, which has contributed to the increase in number of high-end restaurants. Colombian gastronomy is sophisticated, especially in the large cities, and it can be compared, in quality and service, to the high-end restaurants in other parts of the world. The fast food segment has grown rapidly and it was an excellent alternative during the economic recession. The majority of Colombians are more inclined to eat in fast food restaurants due to work schedules, convenience and affordability of these types of restaurants. Fast food restaurants have been the solution for eating out in times of economic slowdown.

In accordance with Euromonitor publication, food service sales in Colombia increased 1.5% in 2009. Nevertheless, the sector's transactions showed a small decrease during the same period due to the world economic downturn even though Colombia was not affected as profoundly as the rest of the world. The most affected were the full service restaurants followed by cafes/bars and fast food. The self-service cafeterias, independent street kiosks, home delivery and take ways experienced an increase in their transactions due to the growing interest of low price foods.

The Colombian restaurant sector shows that in 2009 there was an attempt from entrepreneurs to open new establishments, which struggled to perform well as a result of the challenging economic environment. In addition, some non-competitive establishments failed to adapt to the economic situation and were forced to close down due to lack of customers. The winners at the end were those companies that were well established and that did not fall into the trap of making aggressive price reductions or unnecessary promotions in order to gain customers.

Although local restaurant and food service chains dominate sales in Colombia, the multinational companies' sales increased slightly faster than those of local outlets in 2009. Among international chains are Hard Rock Café, McDonalds's, Hooters, Dunkin Donuts, Burger King and Taco Bell (opening December 10, 2010), with increases in sales due to the opening of new outlets. Domestic brands that showed double-digit growth were Archies Pizza, Crepes & Waffles, Pizza 1969, Popsy Ice cream and Frisby.

The sector is expected to make a full recovery over the next year or two. However, uncertainty with regard to unemployment (10.2%) will continue to have a negative impact on consumer behavior. Chained food service outlets are expected to perform better than independent outlets. A good number of new brands are expected to enter the Colombian market as franchises.

### **Hotel Industry**

Cotelco reports that hotel occupation in 2008 was 54.6 percent, 51.1 percent in 2009 and estimated 58 percent in 2010. The reason for the downfall in 2009 is due in part to the appearance of "informal hotel accommodations" such as apartments, family homes, and farms where people stay but the places are not registered as hotels and do not pay taxes. This practice has cost the sector losses of about \$166 million. Nevertheless, the President of COTELCO indicates that the hotel sector has increased since 2002 when it represented only the 2% of the PIB compared to 7% of the PIB in 2009. The hotel sector is considered one of the principal job generators in the country and its share, in relation with job opportunities, is 25.8%.

In 2008, 1,599 hotels are operating in Colombia with a total of 58,824 rooms available. The average hotel room in 2008 was \$108, in 2009 \$114 and it is estimated at \$127 in 2010. The slow increase in rates is the result of availability of rooms due to the arrival of new hotel chains and the peso reevaluation which was 10.5% in 2009 and 11.62% as of October, 2010.

The Government has favored the construction of new hotels in Colombia by guaranteeing tax exceptions for 30 years. The investment in hotel infrastructure reached \$700 million in 2009 and the following are the new hotel chains operating in the country or under construction: Marriott, Hyatt, Holiday Inn, Sonesta, Widham, Starwood Hotels and Hilton.. The hotel sector grew as well as the tourism sector and new airlines have entered the Colombian skies like Jet Blue, Spirit Airlines, Air Canada, LAN Chile, Taca and Lufthansa.

The traditional hotels in Colombia have invested millions of dollars remodeling their facilities in order to be

competitive with the new chains entering the country. Worth mentioning, the investments in the traditional chains like Hotel Charleston that invested \$3.5 million in hotel Casa Medina (Bogota) and Santa Teresa (Cartagena). The local chains are updating their operations in order to be competitive in services and technology with the international chains.

## **Advantages and Challenges of Exporting to Colombia's HRI Sector**

### **Advantages**

- Colombians consider U.S. products to be excellent quality
- The growth of fast food restaurants requires more value added ingredients to make final product healthier and more appealing.
- The HRI sector has great potential for growth due to the increased tourism.
- Despite the lack of the Free Trade Agreement Ratification, the United States continues to be the number one trade partner for Colombia. Imports from the United States in 2009 accounted for 20.6% in food and agricultural products.
- Multinational companies established in Colombia are taking advantage of their brand names to position new products for the HRI sector.
- Fast food chains are well established but are facing strong competition from local fast food companies.
- The young Colombian population and working women have stimulated the growth of fast food and quick service restaurants.
- The Colombian population is more conscious of eating healthy, therefore there are more opportunities for organics and fresh produce.
- Upper and middle class Colombians are eating out more frequently.
- The rising value of the Colombian peso compared to the dollar favored imports.
- Imports in all sectors are growing fast due to the dollar devaluation.

### **Challenges**

- In order to import food products, a registration of the product has to be obtained from INVIMA (entity equivalent to USDA's FSIS). The cost of such registration is high and lasts ten years. Cost goes from \$500 to \$1600 depending on the product.
- Consumption of processed foods is low by international standards.
- U.S. products have to be high quality and good price in order to be competitive with local food processing companies.
- U.S. companies should guarantee consistent supply of products year around.
- Besides the 15% tariff for most processed foods, the Andean Community assesses an additional variable duty for a number of products such as pet food, poultry and cheese.
- Trade agreements with U.S. competitors make it difficult for many U.S. products to compete. Chile is the main competitor for wine and fresh fruits, which enter the country duty free.
- Transportation is expensive and adds additional cost to the product.

- Cold chain is deficient and Colombians have no clear understanding of this need to maintain product quality.

## **I. Market Entrance Strategy**

- 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.
- 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 shows, such as Alimentec, Expovinos, Agrofuturo, and also be part of trade delegations, using the support provided by the Office of Agricultural Affairs and the Foreign Agricultural Service.
- Many Colombian companies' representatives visit trade shows in the United States, such as PMA, Food and Beverage of the American, IFT, NRA, FMI, and Fancy Food. Take advantage of these visits to meet and educate the Colombian importers.
- Develop, to the extent possible, Spanish marketing/communication materials.
- Work closely with local importers and to comply with food import regulations to facilitate the registration and import of food products.
- Support the importer with promotion campaigns.

### **Market Structure**

The hotel and restaurant sector obtain products from different distribution channels. For example produce is bought from wholesalers, retailers and specialized fruit and vegetable supermarket like the fast growing Surtifruter de la Sabana chain. Imported meats and seafood are obtained from specialized importers who have the appropriate infrastructure to handle these products. Other products are bought from hypermarkets specialized in food service.

Wine and liquor are procured from importers/distributors and also from retailers that import directly a wide variety of wines from different countries. Lately, a few high-end restaurants are importing some wine directly. With the exception of fast food restaurant chains and a few upscale restaurants, there are a few HRI establishments that import products directly due to the small volumes needed. Working with consolidators would be the ideal way to overcome this constraint.

### **Sub-Sector Profiles**

#### **Hotels and Restaurants**

Colombia's hotel association is COTELCO, which was created by a Government Resolution more than 50 years ago. COTELCO has 742 hotels associated throughout the country. The organization provides support to its members and represents the hotel investors' interests to the government. COTELCO, in conjunction with the

Ministry of Commerce, Industry and Tourism, ICONTEC (regulatory organization) and the academy, established Norm NTSH-006 that categorizes hotels by stars (from one to five stars). The hotel categorization is done in compliance with international standards that guarantee international visitors the services offered according to the category of the hotel. Most local chains have taken advantage of the revenue exception to remodel the hotels and then obtain better classification. COTELCO also regulates the different types of accommodations in the country.

ACODRES represents the interests of the restaurant sector and provides similar services as Cotelco to its members. Acodres is a national gremial association that organizes seminars throughout the country in areas related to restaurant service, menu designs, restaurant management, etc. ACODRES, INCONTEC (Regulatory Organization), the restaurant owners, the academy together with the Ministry of Commerce, Industry and Tourism established Norm 008 dated June 22, 2005, by which the categorization of restaurants are defined. By Decree 2755, Article 4, dated September 30, 2003, the Government of Colombia declares exempt of revenue taxes, for concept of services rendered, the hotels build after January 1, 2003 or remodeled after same date. The exception is granted for 30 years beginning January 2003. New hotels are considered the hotels built in the 15 year period after the approval of the Decree (January 1, 2003). This law has encouraged investment in the hotel sector and the result is the exceptional growth and increase of international hotel chains in Colombia.

### Hotel Occupation

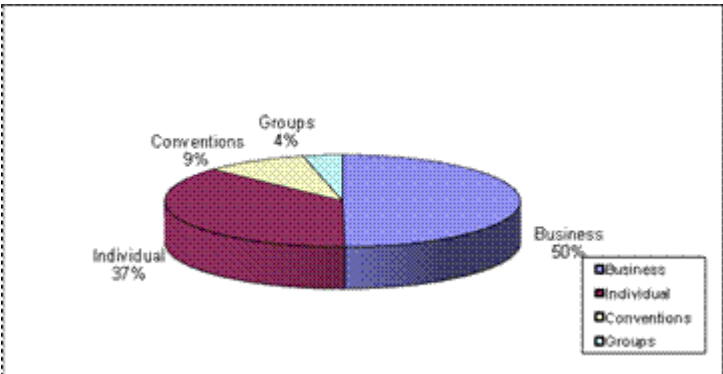
#### Percentage

2007	2008	2009	2010
56.4	54.6	51.1	58

Source: Cotelco

The occupation has been more or less stable during the last four years, but it is important to mention that in 2010, even with more hotel rooms available, the occupation increased 13.5 percent with respect to 2009. The hotel sector is concentrating on niche markets, such as business conventions, congresses and social functions. See graphic below, which represents both national and international guests. International visitors on business represent 50 percent; 37 percent individual tourist; 9 percent conventions, 4 percent tourist groups and 0.8 percent for medical reasons.

In accordance with the National Department of Security (DAS), visitors are mainly from the United States followed by Venezuela, Ecuador, Spain, Peru, Mexico, Argentina and Brazil.



Source: Cotelco

### Main Colombian Hotel Chains

Company Name	Number of Hotels	Location
GHL Hotels Limited	40	Bogota, Medellín, Cali, Santa Marta, Barranquilla, Valledupar, Ipiales, Girardot
Hoteles Estelar	21	Bogota, Cali, Manizales, Cartagena, Medellín, Paipa, Ibagué, Barranquilla
Dann Hotels	14	Bogotá, Cali, Bucaramanga, Medellín, Barranquilla, Cartagena, Popayán, Ibagué
Royal Hotels	11	Bogotá, Cali
Organización German Moralez	10	Santa Marta, Pasto, Bogotá, Montería, Girardot
Hoteles Charleston	3	Bogotá, Cartagena

#### International Hotel Chains in Colombia

Company Name	Number of Hotels	Location
Accor-Sofitel, Mercure, Ibis	5	Bogotá, Cartagena, Ibagué, Cali
Intercontinental Hotel Group	4	Bogotá, Medellín
Hilton International	3	Bogotá, Cartagena
Four Points by Sheraton	2	Cali, Medellín
Marriott	2	Bogotá
Embassy Suites	1	Bogotá
Sheraton	1	Bogotá
Holiday Inn	1	Bogotá
Radisson	1	Bogotá

#### Restaurant Sector

In accordance with National Restaurant Association, ACODRES, the gastronomic sector has grown in sales at an estimated rate of 7% during the last three years, equivalent to \$3.4 billion in 2009. It is estimated that Colombia has 64,000 establishments and at least 30% of these restaurants are well established outlets that comply with GOC regulations and are considered “formal restaurants.” The contribution of the gastronomy sector to the GDP is estimated at 2.2% in 2010. The growth in number and income of the restaurant sector is also due to the increased of tourism, which has grown 50% in the last three years. Principal tourist cities are Cartagena, Medellin, Cali and Bogotá.

Quick service and fast food restaurants represent one third of the market and are very popular in the large cities. These fast food outlets are strategically located around working areas, food courts in shopping malls, on highway sides, etc. The fast food restaurants have become the solution for families that have little time to prepare traditional meals and a moderate income.

Competition among fast food chains is very intense. McDonald's, Presto, Del Corral, Burger King are the main names that share the hamburger market. A strategy of the fast food chains is to advertise and promote campaigns for children in order to attract families. This strategy has contributed immensely to the success of fast food restaurants in Colombia. However, Colombian fast food chains like Presto, Hamburguesas El Corral, chicken roasters, and pizza places are important competition to the international chains.

#### Main Fast Food and Quick Service Chains in Colombia - 2009

Establishment Name	Global Brand Owner	Outlets	Market Share %
El Corral	Inversiones El Corral	151	11.6
Oma	Rstcafe OMA S.A.	150	2.6
Juan Valdez	Procafecol S.A.	130	2.7
Dunkin' Donuts	Donucol S.A.	118	2.7
Frisby	Frisby S.A.	114	5.4
Kokoriko	Avesco S.A.	110	9.9
Presto	Frayco S.A.	99	2.9
Sandwich Qbano	Various franchisees	99	2.5
Helados Popsy	Comercial Allan S.A.	91	1.0
Jeno's Pizza	Grasot Ltda.	90	1.9
Helados Mimo's	Productora y Comercializadora de Alimentos Ltda.	76	4.3
Crepes & Waffles	Crepes & Waffles S.A.	54	9.6
On The Run	Exxon Mobil de Colombia S.A.	35	0.2
Yogen Frusz	La Campiña S.A.	34	1.4
McDonalds's	ADCL – McDonald's	33	9.2
Pizza Pizza	Aliter Ltda.	33	0.1
La Brasa Roja	CBC Ltda.	33	4.6
Archies Pizza	Archies Colombia S.A.	32	3.2
Pizza 1969 Gourmet	Inbercab Ltda.	32	2.4
Star Mart	Chevron Colombia S.A.	26	0.1
Pan Pa'Ya	Pan Pa'Ya Ltda.	26	0.9
Domino's Pizza	Dominalco S.A.	22	0.9
Petrobras	BR Petrobras Distribuidores Ltda.	20	0.1
Charlies Roastbeef	Industrias RB	20	0.4
Mr. Lee	SIA Ltda.	20	0.4
Cali Mio	CBC Ltda.	16	4.6
Cali Veja	CBC Ltda.	15	-
McDonalds	Varios Franchises	14	-
KFC	Food Service del Caribe S.A.	13	*
Others	Others	900	14.4
Total		2,668	100.0

**Source: Euromonitor**

**\*included in "others"**

### **The Institutional Market**

Procurement laws regulate purchases and contracts by government industrial and commercial enterprises. Even when equal contracting conditions apply, goods and services of domestic origin are given preferences. The GOC urges all-official entities and government decentralized industrial and commercial organizations to "buy Colombian"

The following areas are considered important within the institutional sector:

### **Schools**

In accordance with the National Department of Statistics, DANE, the Colombian population in 2010 is 45.5 million; 13.1 million people are within range age of 5 to 19 and are potential students. From the 13.1 million, it



is estimated that five million are enrolled in private schools. Most private schools serve lunch; this is often mandatory at the elementary level and optional at the high school level. The price for an average school lunch is 3 to 4 dollars. Some schools contract the service from catering companies, but the majority has kitchens where food is prepared. The raw materials are bought in supermarkets specialized in food service and also in wholesale markets. There are also food and beverage vending machines in most schools where snacks and sandwiches can be purchased. Sales of imported products in this sector are not significant. Nonetheless, there is significant potential for growth and an opportunity for U.S. products, especially in beverages and snacks with nutritional value.

### **Colombian Government Programs**

The GOC sponsors several programs aimed at improving nutritional standards for children attending public schools. Children from low-income families often have substandard nutrition. The GOC's food assistance programs provide nutritional balanced lunch supplement and reach around four million children up to 14 years of age. Nursing mothers, elderly people and homeless are also included in these programs.

The Colombian Family Welfare Institute (ICBF) and all regional educational offices implement the GOC programs. The annual ICBF budget for nutritional projects that target children and elderly people is estimated at \$430 million.

### **Social and Country Clubs**

There are more than one hundred urban and country clubs in Colombia. Due to the economic slowdown in recent years, several mergers and acquisitions took place among clubs. Some clubs were bought by corporate business. Clubs continue to recover from low sale and have adopted strategies in order to increase sales like offering services to non-members for social events. Social clubs are the second best market for upscale imported products. The clubs buy from specialized food service supermarkets, from food and wine importers and also from wholesale markets.

### **Typical Imported Products Used by Clubs**

salmon	sausages	Frozen bakery products	Nuts, pistachio
whitefish	hams	Pastries and confectionary products	Cured cheeses
caviar	Turkey cuts	spices	Frozen vegetables
anchovies	Olives, olive oil	Salad dressings	pastas
Variety of seafood products	Special beef cuts	Prepared sauces	Special rice

## **III. Competition**

The Colombian government protects local producers. The use of import tariffs on imported goods and discretionary issuance of imported licenses and permits on some product; like milk, rice, and poultry serve to promote and protect local production. Nevertheless, there are significant opportunities for imported value added food products in Colombia due to quality and acceptance by consumers. The United States competitors in value added food products are Canada and the European Union; in fruits, and wine Chile is the main competitor, followed by Argentina.

Colombia grants preferential treatment to products coming from the Andean Community due to agreements signed in recent years with member countries. Colombia has bilateral trade agreements with Chile and Mexico

which allows products in the country with zero import duty. With respect to trade with Venezuela, Colombia is actually negotiating a bilateral trade agreement with them. A Trade Agreement has been signed with Canada and should be implemented any time. With the European Union, the Agreement is pending approval from the Parliaments of the different country members.

**The Colombian HRI Situation Facing U.S. Suppliers in 2009**

<b>Product Category</b>	<b>Rank</b>	<b>Country</b>	<b>Share of Import Market (Million dollars)</b>
Meat and Meat Offals HS 02 Net Imports: \$36	1	Chile	12.6
	2	U.S.A.	9.6
	3	Canada	5.1
	4	Paraguay	2.9
	5	Peru	2.9
	6	Argentina	2.8
		Others	0.1
Dairy Products HS04 Net Imports: \$11.8	1	U.S.A.	2.9
	2	Rep. Czech.	
		Chile	1.6
	3	Argentina	1.4
	4	Canada	1.2
	5	Brazil	1.0
	6	Others	0.9
			2.8
Milling, Malt, Starches HS11 Net Imports: \$19.9	1	U.S.A.	10.1
	2	China	2.2
	3	Chile	1.8
	4	Brazil	1.3
	5	Thailand	1.2
	6	Germany	0.9
		Others	2.4
Edible Fruits and Nuts HS08 Net Imports:\$135.6	1	Chile	85
	2	U.S.A.	28.6
	3	Ecuador	7.5
	4	Peru	4.9
	5	Venezuela	2.2
	6	Italy	2.0
		Others	5.4
Cereals HS10 Net Imports: \$1,159	1	U.S.A.	423.6
	2	Argentina	330.9
	3	Brazil	175.5
	4	Canada	142.4
	5	Mexico	28.7
	6	Peru	28.1
		Others	30
Beverages HS22	1	England	30
		Ecuador	21

Net Imports: \$122	2	Chile	18
	3	Argentina	9.6
	4	Mexico	4.9
	5	Spain	4.9
	6	Others	33.6
Prepared Meat and Fish HS16 Net Imports: \$156	1	Ecuador	71
	2	Duty free Cartagena	
		U.S.A.	37.5
	3	Peru	19.9
	4	Chile	10.8
	5	Spain	4.3
	6	Others	2.0
			10.5

Source: Global Trade Atlas

#### IV. Best Products Prospects

Colombia is a growing market for value-added food products. Surveyed retailers and food importers feel there is significant potential for new products almost 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. Organics is the new trend and retailers are searching for the best suppliers of such products. The following products categories represent the major export opportunities and some emerging opportunities for U.S. food products to Colombia. These products will be even more competitive once the Colombian Trade Promotion Agreement between Colombia and the United States is implemented.

HS	Product	Tariff
<b>02</b>	<b>Beef, pork and poultry</b>	
02.02	Special meat cuts (prime rib)	80%
02.03	Pork	20%
02.07	Turkey, duck	20%
<b>03</b>	<b>Fish and seafood</b>	
03.02	Fish, shrimp, crab, lobster, salmon	15%
03.05	Smoked fish	15%
<b>04</b>	<b>Dairy, products</b>	15%
04.05	Prepared butters, oils from milk	20%
04.06	Cheese and curd	15%
<b>07</b>	<b>Frozen products</b>	
07.10	Vegetables	15%
<b>16</b>	<b>Poultry Meat</b>	
16.02	Poultry meat by products	15%
<b>17</b>	<b>Sugars</b>	
17.02.20	syrups	10%
<b>19</b>	<b>Pasta and bakery products</b>	
19.01	Baking mixes, pastas	15%
19.05	Pastry and dessert mixes	15%
<b>20</b>	<b>Preserved Fruits and Vegetables</b>	

20.01	Prepared with vinegar	15%
<b>21</b>	<b>Different Food Preparations</b>	
21.03	Sauce preparations, condiments, mustard preparations, etc.	10%
21.04	Soup preparations	15%
<b>22</b>	<b>Beverages</b>	
22.04	Wines	15%

## V. Related Reports

Check following link:

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

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