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Report Highlights:

Colombia's economic recovery together with growing domestic livestock and poultry production are driving Colombia's corn demand. With the rapid development of poultry and egg production in particular, corn consumption is projected to increase in market year (MY) 2025/2026 to support strengthening demand from the animal feed sector. Corn consumption will continue to be buoyed mostly through imports, forecasted to reach 7.2 million metric tons (MMT), with the United States as the main supplier. Domestic corn production in the outyear is anticipated to increase to 1.55 MMT with favorable weather conditions. By contrast, milled rice production is forecast to drop to 1.94 MMT as low prices will discourage rice area expansion after a record production year. Outyear rice imports are anticipated to decrease to 120,000 MT, while wheat imports are projected to grow, in line with higher consumption levels supported by domestic economic recovery. Competition with Canada continues to challenge to U.S. wheat market growth.

Commodities:
Corn

Table 1. Corn: Production, Supply, and Distribution

Corn	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2023		Oct 2024		Oct 2025	
Colombia	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	390	390	370	370	0	370
Beginning Stocks (1000 MT)	340	340	390	390	0	389
Production (1000 MT)	1600	1600	1500	1500	0	1550
MY Imports (1000 MT)	6622	6622	6800	6950	0	7200
TY Imports (1000 MT)	6622	6622	6800	6950	0	7200
Total Supply (1000 MT)	8562	8562	8690	8840	0	9139
MY Exports (1000 MT)	2	2	1	1	0	2
TY Exports (1000 MT)	2	2	1	1	0	2
Feed and Residual (1000 MT)	6650	6650	6800	6900	0	7100
FSI Consumption (1000 MT)	1520	1520	1530	1550	0	1580
Total Consumption (1000 MT)	8170	8170	8330	8450	0	8680
Ending Stocks (1000 MT)	390	390	359	389	0	457
Total Distribution (1000 MT)	8562	8562	8690	8840	0	9139
Yield (MT/HA)	4.10	4.10	4.05	4.05	0	4.19

Data source: FAS historical data series. Post estimates for MY 2025/2026.

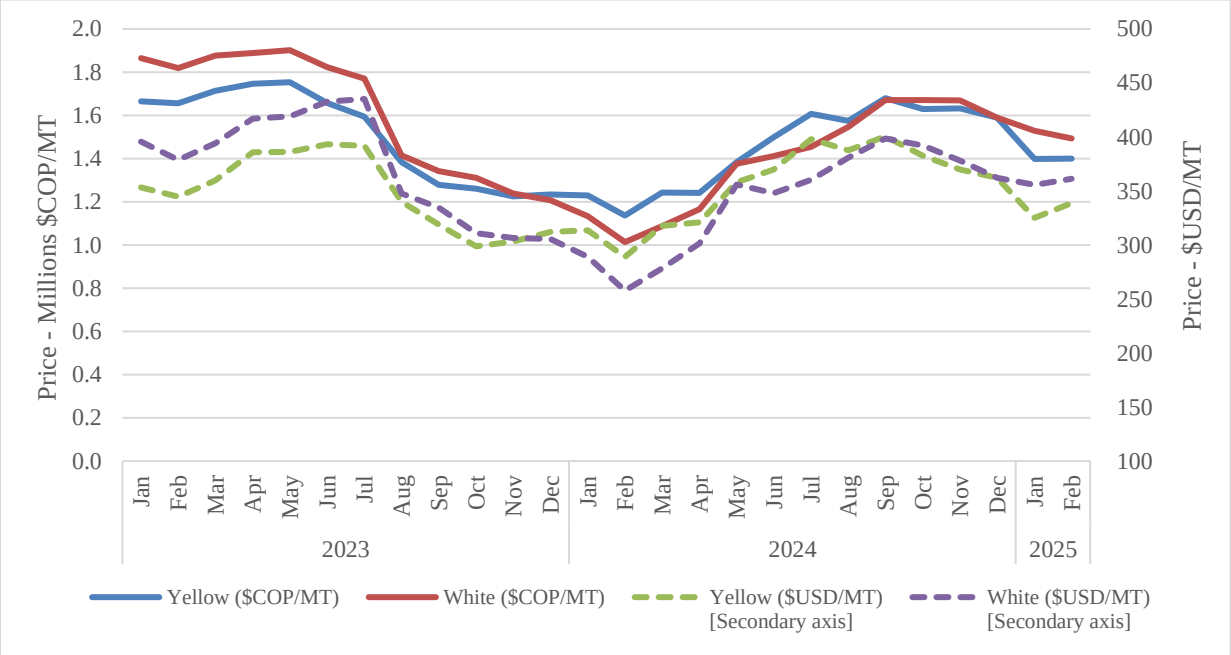
Production

In market year (MY) 2025/2026 (October-September), Colombian corn production is forecast to increase 3.3 percent year-on-year to 1.55 million metric tons (MMT), supported by expectations of favorable weather conditions. Harvested area is anticipated to remain unchanged at 370,000 hectares (ha) with consistent farmgate prices. In MY 2024/2025, corn production declined 6.3 percent compared to the previous year, driven by a 5.1 percent reduction in area harvested. The decrease was attributed to falling domestic corn prices, which followed the global downward trend and discouraged farmers from increasing cultivated area.

Prices paid to Colombian corn producers slightly recovered in late 2024, also mirroring international rates (Figure 1). The current corn season located in Colombia's north coast and Tolima department (one of the primary corn producing departments) is advancing normally, and as of March 2025, is nearly 90 percent mature. Unexpected, high precipitation levels were recorded in Tolima in late February, but by March, drier conditions were realized which allowed farmers to harvest. Meanwhile, producers in the eastern plains[1] are preparing their fields for the next planting cycle.

[1] Also known as the *Orinoquía*, or *Los Llanos Orientales*, the region includes the departments of Arauca, Casanare, Vichada, and Meta.

Figure 1. Colombia: Domestic Average Monthly Corn Prices Paid to Producers Calendar Years (CY) 2022-2024, million Colombian Pesos (COP)/Metric Ton (MT) and USD/MT



Data Source: National corn producer prices report, Colombian Association of Cereal and Legume Producers.
Note: U.S. dollar prices (USD) calculated using monthly average exchange rate from Banco de la República de Colombia.

Colombia produces yellow and white corn, grown interchangeably by farmers depending on market conditions. The sector is divided into modern and traditional production systems. Modern production is largely found on medium to large industrial farms, and accounts for approximately 80 percent of Colombia's total corn output. Here, farmers employ hybrid seeds and improved agricultural practices, reaching an average yield of 5.8 MT/ha, which covers approximately 55 percent of total corn area. In contrast, traditional corn varieties[2] are primarily cultivated on small farms less than 5 ha, and are mainly used for household consumption, yielding 1.9 MT/ha on average. There are 17 corn production departments in Colombia, but 70 percent of total production is concentrated in seven departments from the north coast (Córdoba, Bolívar, and Sucre), central region (Tolima, Huila, and Valle) and eastern plains (Meta).

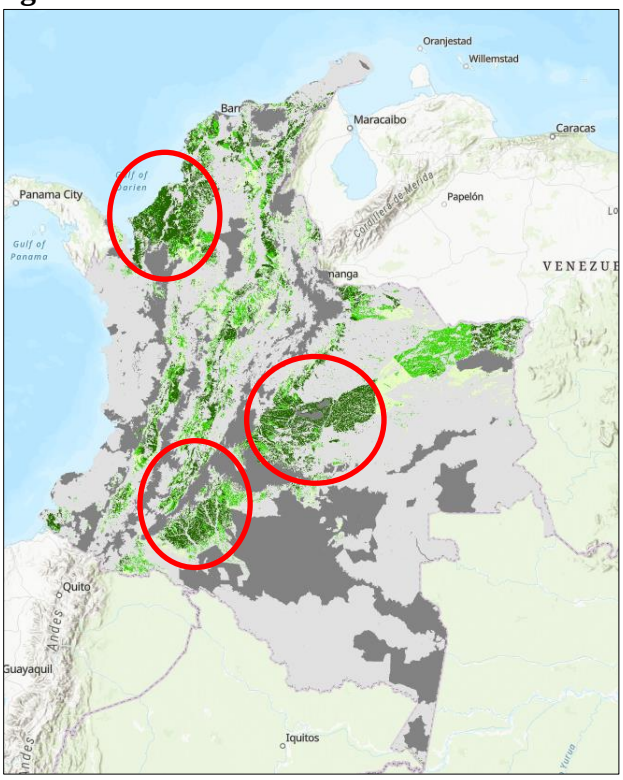
In CY 2023, Colombia planted 142,710 ha of genetically engineered (GE) corn,[3] a 20 percent increase year-on-year, the second highest rate following record figures (143,000 ha) in 2021. Colombian departments Meta, Tolima, Cordoba, Valle del Cauca, and Cesar maintain the highest GE-corn adoption per area planted.

According to the Agricultural Rural Planning Unit[4] (UPRA), Colombia has approximately 16 million ha of arable land for corn production (Figure 2). Nevertheless, systemic impediments

[2] A mix of hybrid and open-pollinated corn varieties, including non-certified seed varieties whose origins date back centuries. Hybrid yields tend to vary by department and variety. See: CIAT/CIMMYT, 2019; Maize for Colombia 2030 Vision.
[3] Latest data available as of February 2025.
[4] Agency within the Ministry of Agricultural and Rural Development.

limit a rapid transformation of expanded corn area, including inadequate infrastructure, technological limitations, insufficient crop input distribution, and a lack private and public sector investments. There are private sector initiatives[5] to increase corn and soybean area planted in the eastern plains, but land tenure issues remain a significant barrier to investment.

Figure 2. Colombia: Corn Production Suitability



Data Source: System for Rural Agricultural Planning (SIPRA), UPRA; February 2025.[6]

Consumption

In MY 2025/2026, corn consumption is forecast to increase 2.7 percent from the MY 2024/2025 revised estimate, reaching 8.68 million metric tons. This growth is primarily driven by exponential demand from the animal feed sector and aligns to Colombia's 2025-2026 economic growth projections. The Colombian economy will grow 2.6 and 3.4 percent in 2025 and 2026 respectively, according to Colombia Central Bank estimates.[7]

Posts adjusts the MY 2024/2025 corn consumption estimate upward to 8.45 MMT as the growth in domestic poultry and pork production was stronger than expected in 2024 and has led to higher corn demand for animal feed. In 2024, chicken and egg production increased 2.8 percent

[5] One prominent investment is the *Soya-Maiz Proyecto Pais* Initiative, a program launched in 2020 to vastly scale planted areas of corn and soybean in the eastern plains region to build the domestic agricultural sector and substitute imports.

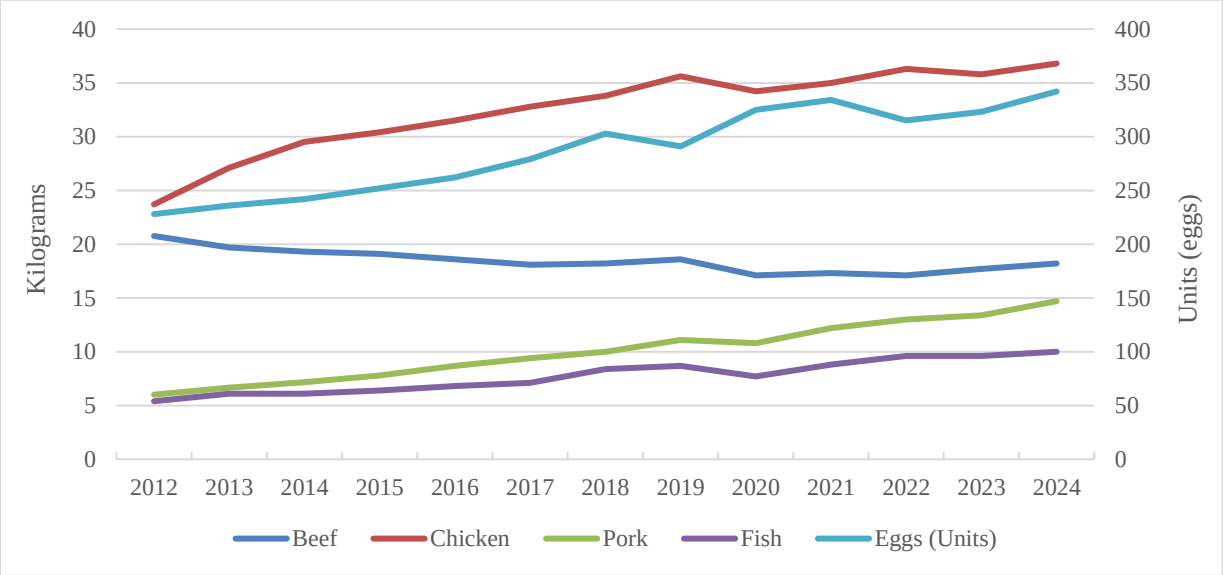
[6] This map illustrates optimal areas for corn production for the second semester. The dark green illustrates the highly suitable land for corn production (8.2 million ha), medium green indicates moderately suitable (4.9 million ha), and light green corresponds to marginally suitable land (2.9 million ha). Light and dark grey areas are not suitable and are protected areas, respectively. Most production is in the red circles of the map.

[7] Source: Colombia's Central Bank Estimates, January, 2025. (Banco de la República).

in year-on-year, while pork production increased 7.8 percent in the same period. Colombia's poultry industry remains the largest consumer of animal feeds,[8] representing 65 percent of total corn imports, while the pork sector accounts for 17 percent.[9] These two sectors experienced lower production costs due to favorable international corn prices and has led to expanded animal protein production. Colombia's cattle sector consumes around 8 percent of imported corn, and the remaining 10 percent is devoted to the aquaculture and petfood industries.

Colombia consumes higher yellow corn volumes than white corn, as yellow corn is a key input for the animal feed sector, while white corn primarily used for food manufacturing (Figure 3).

Figure 3. Colombia: Per Capita Animal Protein Consumption by Product (Kg and Units)



Data Sources: Colombia commodity producer associations including Fenavi (poultry), PorkColombia (pork), Fedegan (cattle), Fedeacua (aquaculture), 2025.

Approximately 95 percent of corn imports are processed for animal feed, with the remaining 5 percent for human consumption. Domestic corn production is mostly utilized in the food processing sector, particularly white corn. In MY 2025/2026, food and industrial (FSI) corn consumption is forecast to increase 2 percent from MY 2024/2025 to 1.58 MMT, in alignment with current Colombian economic trends. For MY 2024/2025, FSI corn consumption is revised upward to 1.55 MMT, driven by lower domestic corn prices, which stimulated increased consumption in both the food and industrial sectors.

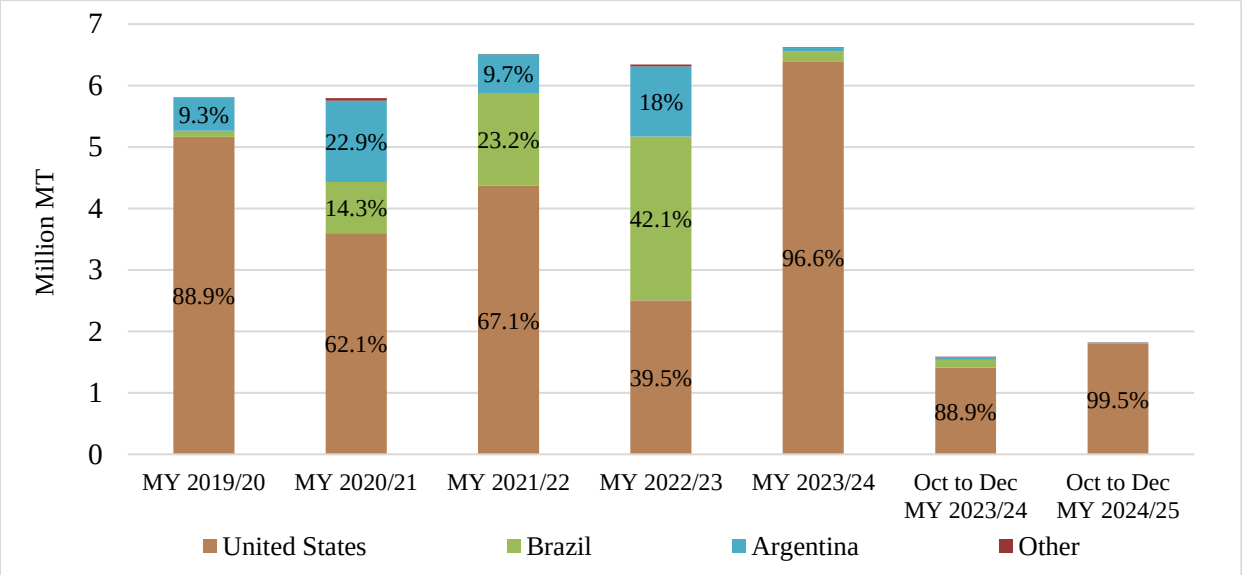
Trade

Market year 2025/2026 corn imports are forecast to reach 7.2 MMT, 3.6 percent higher from Post's MY 2024/2025 revised estimate due to continued demand growth from the animal feed sector. U.S.-origin corn imports are expected to remain high in both the current MY and outyear,

[8] Typical poultry feed composition is 60 percent corn, 15 percent soybeans, 15 percent soybean meal, and the remaining 10 percent in micronutrients. On average, animal feed represents 75 percent of production costs.
[9] Feed formulation for pork ranges between 50-70 percent corn in the ration, which varies based on animal's diet and the type of production (e.g., finishing, lactation), in addition to current corn and soybean meal prices. Feed typically accounts for approximately 73-75 percent of total pork production costs.

which consists of more than 90 percent market share. This rate should continue, assuming Mercosur duties remain at the current rate[10] along with the continued zero duty on U.S. corn via the United States-Colombia Trade Promotion Agreement (CTPA) (Figure 4).

Figure 4. Corn Imports by Origin, MYs 2019/2020-2024/2025 and Percent Share (MMT)



Data Source: Trade Data Monitor (TDM).

In the current MY 2024/2025, Colombia's corn imports are revised 5.3 percent higher to 6.95 MMT, reflecting current domestic feed demand. From October to December 2024, Colombia corn imports reached 1.8 MMT, 14.4 percent higher year-on-year, with U.S. corn accounting for nearly all imports.

Stocks

Market year 2025/2026 ending stocks are forecast at 457,000 MT, a volume which supplies more than two weeks of operations. Colombian importers typically maintain limited inventories given the high purchase frequency.[11] There are no government policies establishing grain inventories.

Policy

Colombian President Gustavo Petro has emphasized the goal of achieving agricultural self-sufficiency, with a particular focus on reducing the country's dependence on corn imports. Despite this commitment, no specific program targeting corn production to date has been announced. The agriculture ministry's current efforts are primarily directed toward various agricultural reforms, including formulizing land distribution policies. Separately, the *Soya-Maiz Proyecto País*, a private-public partnership to scale corn production primarily in the eastern plains, maintains an overt goal to attain sufficient production to competitively reduce imports.

[10] See Policy Section. Mercosur-origin tariff rates for corn remain high as of March 2025 due to the downward trend of international prices.

[11] This tendency accounts for the U.S. corn zero percent duty, and Mercosur-origin corn duties that change every two weeks.

Colombia utilizes the Andean Price Band System (APBS) as a member of the Andean Community of Nations (CAN) to stabilize prices for a select group of sensitive agricultural products, including corn (Table 2).[12] The U.S.-Colombia Trade Promotion Agreement excludes the APBS mechanism for U.S. imports and instead incorporates a tariff rate quota (TRQ) mechanism with out-of-quota duties. Duties on U.S. yellow and white corn were phased-out in 2023.

Table 2. CAN: Corn Floor and Ceiling Prices (USD/MT)[13]

Period	Commodity	Floor Price CIF	Ceiling Price CIF
April 2024 - March 2025	**Yellow Corn**	$260	$320
	White Corn	$287	$345
April 2025 - March 2026	**Yellow Corn**	$285	$350
	White Corn	$308	$374

Data Sources: CAN Resolutions 2367/2023, 2456/2024.

Since April 2023, Mercosur tariffs on both yellow and white corn imports have been applied due to international price declines. Refence prices and effective duties on yellow and white corn from Mercosur countries are revised every two weeks (Table 3).

[12] The APBS price stabilization is triggered when the international reference price falls below a set floor, and a tariff is increased. The base tariff is reduced when the reference price exceeds the set ceiling. Floor and ceiling prices are adjusted annually, according to a mathematical calculation, and in accordance with information sources and reference markets established in CAN Decision 371.

[13] The CAN reference price is the biweekly average of daily, weekly, or monthly quotations observed in the referential markets (FOB Gulf based on the Chicago Board of Trade first position for corn). Such a reference price must be expressed in terms of CIF. Depending on how bi-weekly CIF reference prices of corn behave, the effective duties under the APBS for each period will be established.

Table 3. 2024-2025 APBS Reference Price and Effective Duties on Mercosur Origin Yellow and White Corn (USD/MT)

2024-2025	Yellow corn (HS 10059011)		White corn (HS 10059012)	
	Reference Price	Tariff %	Reference Price	Tariff %
Apr 1-15, 2024	209	41	275	3
Apr 16-30	214	37	276	3
May 1-15	213	38	277	2
May 16-31	214	37	274	3
Jun 1-15	218	34	263	8
Jun 16-30	220	33	260	10
Jul 1-15	221	32	261	9
Jul 16-31	213	38	256	12
Aug 1-15	203	45	256	12
Aug 16-31	207	42	256	12
Sep 1-15	204	45	256	12
Sep 16-30	203	45	256	12
Oct 1-15	216	36	256	12
Oct 16-31	227	28	256	12
Nov 1-15	232	25	256	12
Nov 16-30	231	26	256	12
Dec 1-15	231	26	256	12
Dec 16-31	224	30	256	12
Jan 1-15, 2025	225	30	256	12
Jan 16-31	225	30	256	12
Feb 1-15	237	22	256	12
Feb 16-28	243	19	290	0
Mar 1-15	247	17	289	0
Mar 16-31	247	17	282	0

Data Source: Andean Community of Nations, Resolutions of Reference Prices under the APBS.

Colombia's corn sector maintains a checkoff program administered by the corn growers association (Fenalce) via the National Cereal Fund. The program collects 0.75 percent of the sales price per/kg for both yellow and white corn from the grower.[14] Funds are utilized for research investments, social and technical programs, and market promotions.

Through Resolution 375, issued on December 26, 2024, the Ministry of Agriculture and Rural Development formally recognized the National Corn Council. This group links key stakeholders from the corn value chain, including ministry officials, producers, traders, input suppliers, and processors. This council is an advisory body to the national government aimed to improve competitiveness of Colombia's corn sector.

[14] The amount was established by Law 101 of 1993.

Commodities:
Rice

Table 4. Rice: Production, Supply and Distribution

Rice, Milled	2023/2024		2024/2025		2025/2026	
Market Year Begins	Apr 2023		Apr 2024		Apr 2025	
Colombia	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	568	568	570	600	0	570
Beginning Stocks (1000 MT)	161	161	107	107	0	257
Milled Production (1000 MT)	1865	1865	1930	2020	0	1940
Rough Production (1000 MT)	2743	2743	2838	2971	0	2853
Milling Rate (.9999) (1000 MT)	6800	6800	6800	6800	0	6800
MY Imports (1000 MT)	81	81	180	180	0	120
TY Imports (1000 MT)	195	195	135	120	0	180
Total Supply (1000 MT)	2107	2107	2217	2307	0	2317
MY Exports (1000 MT)	50	50	55	50	0	50
TY Exports (1000 MT)	50	50	55	50	0	50
Consumption and Residual (1000 MT)	1950	1950	2000	2000	0	2020
Ending Stocks (1000 MT)	107	107	162	257	0	247
Total Distribution (1000 MT)	2107	2107	2217	2307	0	2317
Yield (Rough) (MT/HA)	4.83	4.83	4.98	4.95	0	5.00

Data Source: FAS historical data series. Post estimates for MY 2025/2026.

Production

Market year 2025/2026 (April-March) milled rice production is forecast to decrease 4 percent from the revised MY 2024/2025 estimate, reaching 1.94 MMT of milled rice equivalent (MRE). The downward trend in local prices since late 2024 will likely keep growers cautious about expanding cultivation in the outyear. As of February 2025, rice prices paid to producers have averaged 20 percent lower year-on-year which sparked protests from rice producers, primarily in the central region departments as the first semester harvest approaches (Figure 7). Rice producers allege that production costs are not covered with current prices.[15] The National Federation of Colombian Rice Producers (Fedearroz) and the Colombian Ministry of Agriculture and Rural Development are requesting producers to drop cultivated area to maintain profitable prices while attempting to reduce large inventories after a record MY 2024/2025 production season.

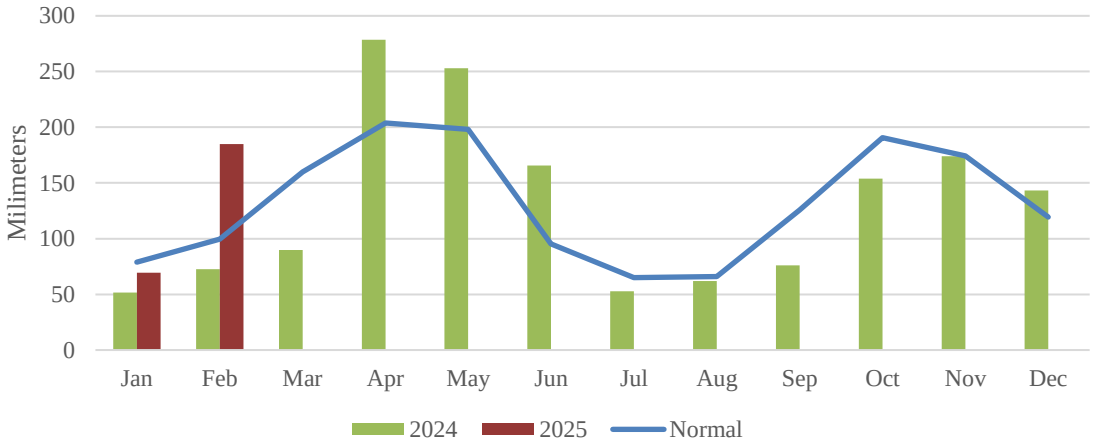
Weather conditions have generally been favorable for rice cultivation. Nevertheless, in February and March 2025, several rice producing municipalities in the central region (Tolima) have experienced above-average precipitation, leading to delays in soil preparation for planting and harvesting (Figures 5 and 6).

[15] See: "Crisis in *Corabastos* (Bogota wholesale market): rice prices are skyrocketing due to strikes and roadblocks." Infobae, published March 10, 2025.

Figure 5. (Left) Irrigated rice field following ten days germination with expected harvest in June 2025. (Right) Irrigated rice field at 84 days growth.

Source: Post field visit; Ibague, Tolima department, February 2025.

Figure 6. Average Monthly Precipitation in Rice Producing Municipalities[16] in Tolima Department against Historical Average, CY 2023-2024 (millimeters)

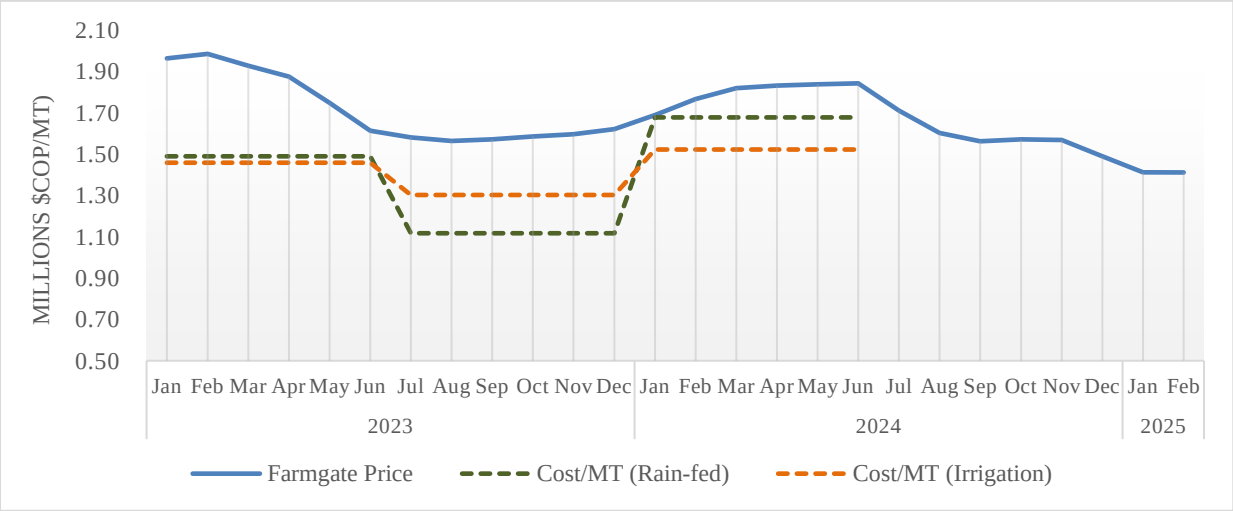


Data Source: USDA Global Agricultural and Disaster Assessment System (GADAS) Climate Hazards Center InfraRed Precipitation with Station (CHIRPS) Monthly Precipitation data set. Precipitation data is provided as the average value across a one-month period against historical averages (see *Normal* trend line).

Post revises MY 2024/2025 Colombia milled rice production 4.7 percent higher to 2.02 million metric tons. This increase is attributed to higher cultivated area, located primarily in the eastern plains departments, and supported by mostly favorable weather conditions, which resulted in greater production in the second half of 2024. Nevertheless, increased domestic production is among the many factors that has affected current rice prices, depending on the region and cropping system (Figure 7).[17]

[16] Data includes the municipalities of Espinal, Saldaña, Ibague, and Venadillo in Tolima department.
[17] Production costs for irrigated rice systems remain relatively stable throughout both semesters.

Figure 7. Domestic Rice Prices vs. Production Costs by Cropping System (COP/MT)



Data Source: Colombian Rice Growers Federation (Fedearroz).
Note: Prices based on green paddy rice on a national average. July 2024-February 2025 production costs unpublished to date.

Colombia's current national average yield is estimated at 5 MT/hectare (paddy rice basis). Rice is grown throughout the year with an estimated 65 percent of production occurring between July-December. There are approximately 16,000 rice growers broadly distributed across five regions with the eastern plains (Llanos) and central region. This consists of Casanare, Meta, Tolima, and Huila departments, which are responsible more than 70 percent of total production.[18] About 40 percent of production originates from the Llanos, primarily rain-fed cultivation, with paddy rice yields averaging 4 MT/hectare. Rice farmers in the Llanos typically have flexibility to adjust area planted as needed due to significant, under-utilized land in the region. The central region (Tolima and Huila) maintains 30 percent of national production, which typically utilizes irrigation systems (and currently fully planted). Central region yields average 6.5 MT/hectare.

Most Colombian rice growers lack on-farm drying equipment or storage silos and thus cannot keep their harvest to sell later in the year. Most growers must sell their harvest as unmilled green paddy rice to millers to be dried, stored, and processed.[19] In Colombia, there are approximately 95 rice millers operating 121 mills, with companies ORF S.A. and Grupo Diana maintaining nearly half of market share.

[18] Source: Fifth National Rice Census (CNA) 2023; National Department of Statistics (DANE).
[19] Fedearroz operates four mills throughout Colombia and funded from the proceeds through the CTPA TRQ auctions for U.S. rice. Through this system, farmers have the option to dry and store their rice to sell at a period with favorable prices.

Consumption

Market year 2025/2026 milled rice consumption is projected to slightly increase 1 percent to 2.02 MMT MRE, owing to steady economic recovery.

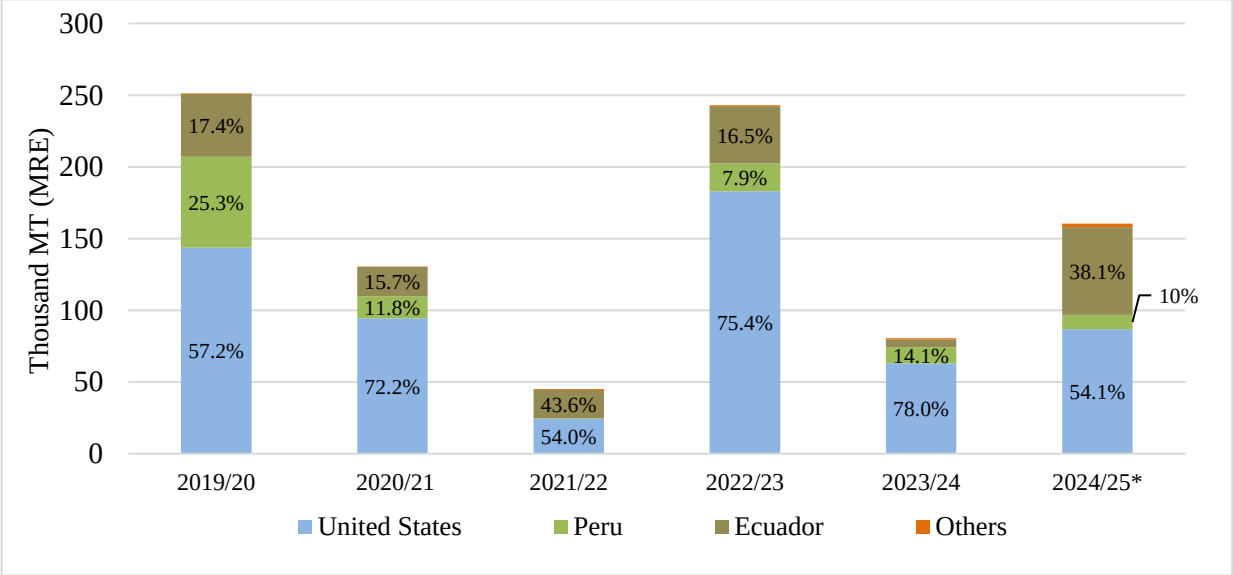
Rice is among the key staples for Colombian households, with relatively high per capita consumption compared to other South American countries. The National Department of Statistics estimates that, over the course of 2024, per capita rice consumption grew 15 percent year on year to 46 kg, with 98 percent of rice consuming households. Rice is mostly sold in smaller mom-and-pop stores, or "tiendas" (92 percent), followed by supermarkets (4.3 percent) and wholesale and produce markets (3.3 percent).[20] Rice consumption is primarily supplied by locally produced rice (90 percent) with the remaining 10 percent covered by imports.

Trade

Outyear Colombian rice imports are forecast 33 percent lower to 120,000 MT as demand will be met with local rice, owing to higher than anticipated domestic production and elevated stocks from the previous marketing year.

Market year 2024/2025 rice imports remain unchanged at 180,000 metric tons. From April-December 2024, rice imports grew 250 percent year-on-year, with the United States and Ecuador as the main suppliers (Figure 8). In the first half of calendar year (CY) 2024, low domestic stocks and high local prices stimulated increased imports. However, sufficient domestic offers from the primary harvest season lessened import demand through late 2024 into 2025.

Figure 8. Colombia: Rice Imports by Country of Origin and Percent Share (MY, Thousand Metric Tons MRE)

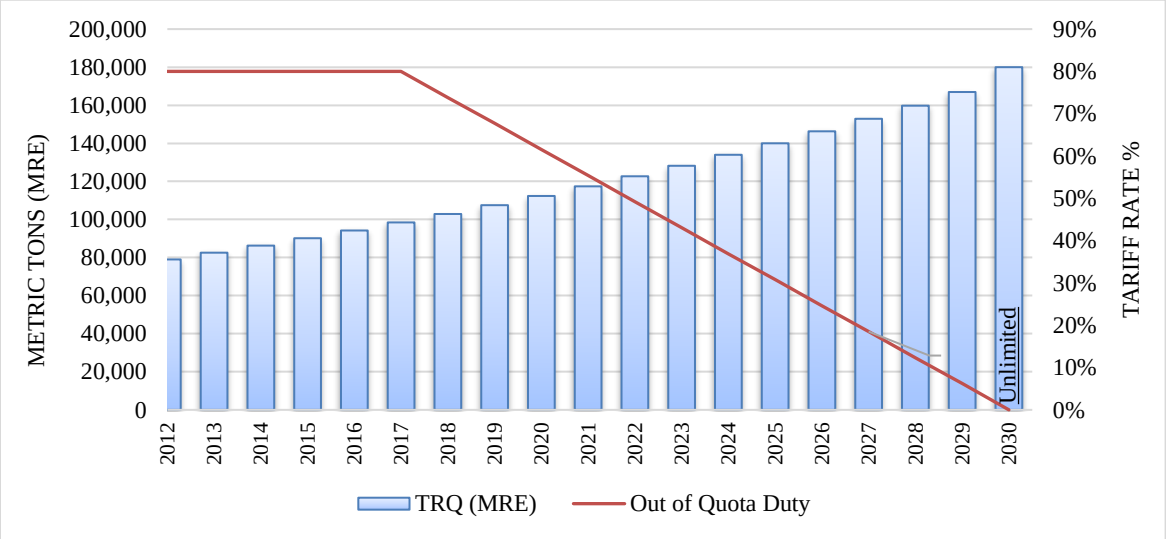


Data Source: TDM.
Note: *MY 2024/2025 includes trade data from April to December 2024.

[20] Increased rice consumption can also be partly attributed to the growth of "hard discount" stores—companies including Ara, Dollar City, and D1, to name a few, which sell consumer goods including rice at highly reduced prices.

The CY 2025 TRQ for U.S. rice under the CTPA is 140,003 MT, with a 30.8 percent out-of-quota duty rate. These duties will phase out by 2030 (Figure 9).[21] The first 2025 Colombia Rice Export Quota (COL-RICE) was not fully subscribed. From the available quantity (98,040 MT MRE), 10,336 MT MRE were allocated (10.5 percent of total). Industry contacts attest there is sufficient rice in the local market from the main domestic harvest, along with competitive pricing. In addition, Post sources indicate that millers have critiqued U.S. rice quality and prefer locally produced or CAN-origin rice due to specific quality characteristics. Two more COL-RICE auctions will take place in June and October 2025 for the remaining 41,963 MT MRE quota.

Figure 9. U.S. Rice CTPA Tariff Schedule (CYs 2012-2030) (MT)



Data Source: CTPA, Appendix 1.

Colombia, Ecuador, Peru, and Bolivia (CAN members) are assessed a zero-tariff duty. In 2023, Colombia eliminated restrictions on milled rice imports from Ecuador, as with Peru in 2022. CAN-origin rice is allowed into Colombia between January 1-June 30, and from November 15-December 31 each calendar year.[22] Ecuador and Peru-origin rice are imported overland to mostly supply Colombia's southwestern market.

Colombia is not a major rice exporter and cannot compete on price with neighboring countries. There are milled rice trade flows through Venezuela via the common border, driven by the Venezuelan supply shortages. In the current MY, Post lowers Colombian rice exports to Venezuela 9.1 percent lower to 50,000 MT MRE as Venezuelan importers have shifted to more competitive suppliers[23] while Colombian production is prioritized to supply domestic demand. For MY 2025/2026, rice exports to Venezuela are forecast to remain unchanged at 50,000 MT MRE, as Venezuela will likely continue to source from other origins.

[21] Applies to HS codes: 10061090, 10062000, 10063000, and 10064000.
[22] The import periods were established to protect Colombian rice producers during Colombia's harvest season, much like the CTPA COL-RICE auction schedule.
[23] See USDA GAIN: Venezuela Grain and Feed Update, published October 2024.

Stocks
Outyear ending stocks are estimated at 247,000 MT, which covers industry for more than one month's consumption. The Colombian government does not maintain policies for maintaining grain stocks. Previously the Ministry of Agriculture had offered financial storage incentives for producers and millers to hold certain rice inventories, on an ad hoc basis, to regulate market prices during the peak harvest season in the second half of the year. However, the Agriculture Ministry did not offer this program in 2024.

Policy
Most Colombian rice programs are sponsored by Fedearroz through the National Rice Fund, a checkoff program that collects 0.5 percent of the sales price of each kg of green paddy rice from producer members.[24] Mills apply this charge at the time of purchasing green paddy rice. Most rice growers are members of Fedearroz and benefit from educational programs, technical training, and sales support. Additionally, Fedearroz offers technical assistance through extension services and the AMTEC program ("Massive Technological Adoption," in Spanish), which helps farmers adopt crop management technologies to boost productivity and reduce costs with minimal environmental impact.

Beginning March 3, 2025, many Colombian rice producers have protested low domestic rice prices by blockading roads in Tolima, Huila, Casanare, Meta, and North Coast departments. Protestors allege the drop in prices is due to both oversupply and the government's removal of the storage subsidy that previously helped regulate market prices. On March 11, 2025, the Colombian government and farmers reached an agreement, where the Ministry of Agriculture would allocate COP 21.9 billion (USD $5.2 million) for the sector. Of this, COP 8.7 billion will be provided to small producers based their rice production volumes, and the remaining amount will be given to small and medium-sized producers to help cover production costs and break even.[25] The agreement includes other strategies that supports expanding rice exports to regional markets, facilitates credit access for rice producers, and promotes public procurement of rice for government social programs.

[24] The current 0.5 percent rate was established by Law 67 of 1983 and was elevated to the status of "parafiscal contribution" by Law 101 of 1993.
[25] The government agreed to pay qualified "small" producers COP 15,000 per 125 kg cargo (USD $3.63), up to a national 73,000 MT total. Other qualified small and medium growers will be paid COP 9,750/cargo (USD $2.36), covering up to 153,000 metric tons. See: "Rice strike ends after nine days of blockades and negotiations." Infobae, published March 11, 2025.

Commodities:
Wheat

Table 5. Wheat: Production, Supply and Distribution

Wheat	2023/2024		2024/2025		2025/2026	
Market Year Begins	**Jul-23**		**Jul-24**		**Jul-25**	
Colombia	**USDA Official**	**New Post**	**USDA Official**	**New Post**	**USDA Official**	**New Post**
Area Harvested (1000 HA)	3	3	3	2	0	2
Beginning Stocks (1000 MT)	342	342	233	233	0	239
Production (1000 MT)	6	6	6	6	0	6
MY Imports (1000 MT)	1973	1973	2100	1980	0	2000
TY Imports (1000 MT)	1973	1973	2100	1980	0	2000
Total Supply (1000 MT)	2321	2321	2339	2219	0	2245
MY Exports (1000 MT)	18	18	25	20	0	22
TY Exports (1000 MT)	18	18	25	20	0	22
Feed and Residual (1000 MT)	120	120	125	80	0	80
FSI Consumption (1000 MT)	1950	1950	1900	1880	0	1900
Total Consumption (1000 MT)	2070	2070	2025	1960	0	1980
Ending Stocks (1000 MT)	233	233	289	239	0	243
Total Distribution (1000 MT)	2321	2321	2339	2219	0	2245
Yield (MT/HA)	2	2	2	3	0	3

Data Source: FAS historical data series. Post estimates for MY 2025/2026.

Production
Market year 2025/2026 (July-June) wheat production forecast remains flat year-on-year at 6,000 MT on an estimated harvested area of 2,400 hectares. Colombia primarily produces soft wheat, grown in the three high-altitude departments of Boyacá, Cundinamarca and Nariño, with Boyacá as the main department accounting for 75 percent of production in 2024. Historically, wheat is not a profitable crop in Colombia due to low yields and difficult climatic conditions. Most wheat farms are less than two hectares, with production concentrated in lands 2,800-3,200 meters above sea level. Domestic production supports local markets that use wheat to prepare traditional Colombian foods.

Consumption
Colombia's wheat consumption for MY 2025/2026 is forecast at 1.98 MMT wheat grain equivalent (WGE), a 1 percent increase year-on-year from the revised MY 2024/2025 estimate. Wheat demand for animal feed is price sensitive and has fallen in recent years as the feed sector instead has used cheaper products, primarily corn and dried distillers grains for feed formulations. Colombian wheat consumption for food and industrial use (FSI) typically fluctuates following economic growth. Post projects FSI wheat consumption in the outyear 1.1 percent higher year-on-year. In 2023 and 2024, FSI wheat consumption declined, driven by persistent food inflation, reduced economic activity, and food taxes on various processed wheat

products that led to product substitution.[26] As wheat consumption did not recover as expected in 2024, the Colombian Wheat Millers Chamber is conducting promotional campaigns to increase wheat demand in Colombian households.

Colombian wheat consumption in the current MY is revised 3.2 percent lower to 1.96 MMT, reflecting market realities due to a drop in FSI wheat consumption for both consumers and feed millers.

There are 40 wheat milling facilities mostly located in Colombia's north coast, center, and southwest regions, that annually produce 1.5 MMT of wheat flour.[27] Of total wheat consumption, the bread industry consumes approximately 70 percent, 12 percent of wheat for cookies and crackers, 11 percent for pasta, 3 percent for household baking, and less than 4 percent as animal feed. The animal feed industry imports wheat only when prices are competitive.

Colombia imports high, medium, and low-protein content wheat. High protein content (more than 13.5 percent) is the most widely used product, primarily supplied by Canada, and represents 50-70 percent of wheat flour production. Lower protein wheat (less than 10 percent content) is typically U.S.-origin, and supplies industry demand for cookies and confectionary production.

Trade

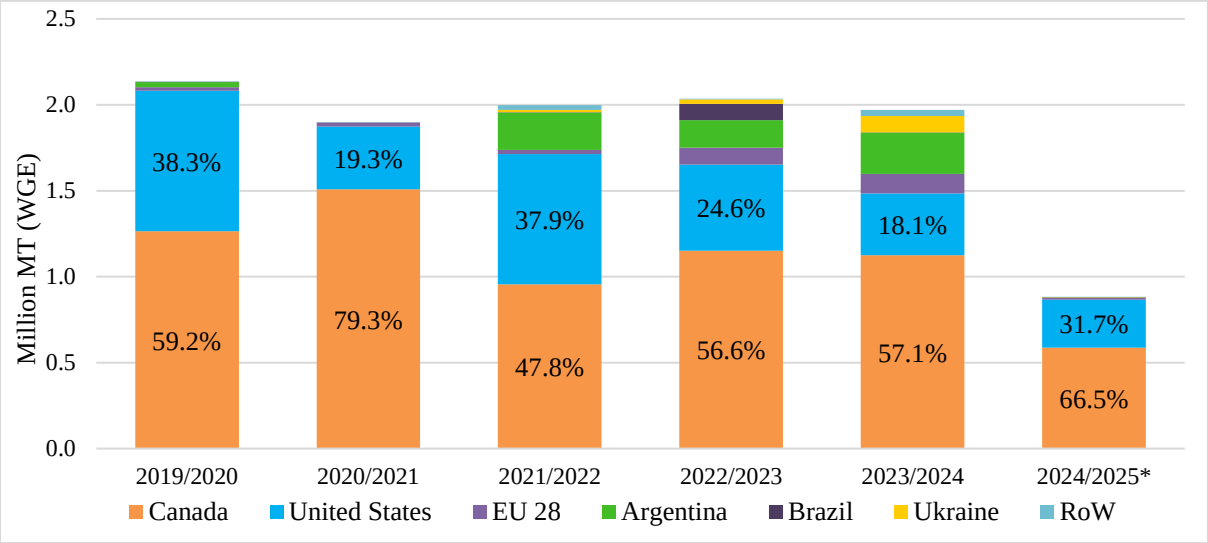
Market year 2025/2026 imports are forecast to increase 1 percent year-on-year to 2 MMT WGE as local consumption is projected to marginally increase following Colombia's economic growth and further supported by local wheat promotional campaigns. The Colombian wheat milling industry is entirely supplied through imports.

Post revises MY 2024/2025 wheat imports 5.7 percent lower to 1.98 MMT WGE reflecting current trends with wheat demand contracted primarily from the animal feed sector. In addition, higher consumer taxes on select wheat products have deterred import growth. Canada and the United States continue to be the main wheat suppliers to Colombia (Figure 10). With the removal of tariffs through the APBS,[28] Colombia occasionally imports wheat from non-traditional sources in South America.

There are approximately 60 wheat importers in Colombia. With its strong milling industry, nearly all (98 percent) of Colombia's imports are raw wheat grain for milling, with the remaining 2 percent comprised of finished pastas and other processed wheat products. Colombia primarily imports Canadian-origin Red Spring and Prairie Spring Red wheat due to price competitiveness and high protein characteristics required by the flour industry. U.S. wheat varieties exported to Colombia in 2023 and 2024 have included Soft Red Winter, accounting for more than 80 percent of total U.S. wheat exports to Colombia, followed by Hard Red Winter, and Hard Red Spring.

[26] Source: "Bread consumption fell 30% this year due to the tax on ultra-processed foods." La Republica, published December 17, 2024.
[27] Colombia's milling factor is estimated between 77-79 percent. By comparison, U.S. flour rate extraction has averaged around 77-78 percent in recent years.
[28] See Policy section, Decree 1092 of August 2024.

Figure 10. Colombia: Wheat Imports by Country of Origin (MY, MMT, WGE)



Data Source: TDM.
Note: *MY 2024/2025 includes trade data from July to December 2024. Market share percentages included for Canada and the United States.

For MY 2025/2026, wheat exports are forecast to reach 22,000 MT WGE, 10 percent higher year-on-year from Post's revised MY 2024/2025 estimate. The increase is driven by production recovery and a slight diversification in export markets. Post revises MY 2024/2025 wheat exports down to 20,000 MT but remains 11 percent higher year-on-year. Historically, Venezuela is the primary destination for Colombian wheat products, followed by Curaçao. However, in the first half of MY 2024/2025, Mexico has become the primary import destination followed by Cuba and the United States. Colombia traditionally exports wheat flour, which represents 80 percent of total wheat product exports. In the current MY however, Colombian pasta has become the primary export product with nearly 73 percent share of total wheat exports.

Stocks

Ending wheat stocks in the outyear are forecast at 243,000 MT WGE, which accounts for approximately six weeks of operations. The feed and wheat milling industries maintain limited carry-over inventories, but most mills have capacity to store products up to two-months of operations.

Policy

Colombia has 18 trade agreements in force, most of which have zero percent duties for wheat, including Canada and the United States as its main suppliers. Wheat from other origins is currently not subject to duties as the Colombian government periodically issues decrees to suspend the APBS mechanism. The government's most recent regulation[29] establishes zero percent duties on wheat imports from any origin for two years, beginning August 2024. The measure was first established in 2020 to alleviate the negative impact of global food disruptions and high international prices stemming from the COVID-19 pandemic.

[29] Decree 1092 of August 2024 notes, "By which the Customs Tariff for the importation of wheat is partially modified and the application of the Andean Price Band System for wheat is suspended."

The Petro Administration has committed to expanding novel nutrition policies, including "healthy taxes" for ultra-processed foods.[30] In 2023, Law 2277 established taxes on processed foods high in sodium, added sugars, and fats. The law includes an initial 10 percent tax rate that increased to 20 percent beginning January 2025. This regulation applies to cookies and pastry products that exceed government established nutritional thresholds of sugar, sodium and fats, although bread is excluded.

Since 1996, Colombian regulations (Decree 1944) require that all wheat flour sold domestically must be fortified with vitamins B1 and B2, niacin, folic acid, and iron. In 2022, the Colombian government reviewed its flour enrichment requirement, although no new regulations have materialized.

Attachments:

No Attachments

[30] Source: USDA GAIN, Colombia Issues New Resolution on Nutrition and Front of Pack Labeling Requirements for Processed Foods, CO2022-0026.