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Colombia

HRI Food Service Sector

Hotel, Restaurant and Institutional Sector

2000

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Report Highlights:

This report contains a description of the hotel, restaurant and institutional market in Colombia and an overview of the demand for imported food and beverage products in the sector.

Includes PSD changes: No
Includes Trade Matrix: No
Annual Report
Bogota [CO1], CO



The Colombian Hotel, Restaurant, and Institutional Sector

**Office of Agricultural Affairs
U.S. Embassy
Bogota, Colombia
July 2000**

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I. Executive Summary

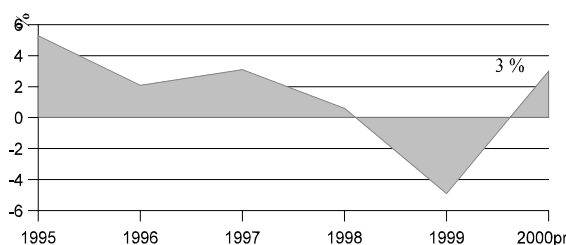
In 1999, total Colombian food and agricultural imports were valued at \$1.3 billion. The United States accounted for 42 percent of total imports valued at \$541 million, making Colombia our largest export market in Latin America after Mexico. The Colombian Hotel, Restaurant and Institutional (HRI) sector is important and has great potential for growth. The sector accounts for 2.2 percent of GDP (\$2 billion) and is expected to grow 5.1 percent in the year 2000. Tourism is also a leading sector of the economy and has tremendous potential, but is restricted by domestic security problems, especially in the country-side, and the very negative international image Colombia has at the moment. Colombia is well endowed with human and natural resources and, should security improve, foreign investment and economic growth would be strong and growth in tourism, with its concomitant demand for imported food products, would be exponential.

HRI sector sales in Colombia are estimated at \$2.5 - 3.0 billion. The market has benefitted from the arrival of world-class hypermarkets, such as Makro and Carrefour and AlKosto (Colombia), which are oriented to serve institutional markets. Competition in food marketing has intensified, and the number of HRI sector importer/distributors has declined. The major suppliers to the Colombian HRI Sector are foreign food processing affiliates, with a good number of independent importer/distributor, should serve the same clients.

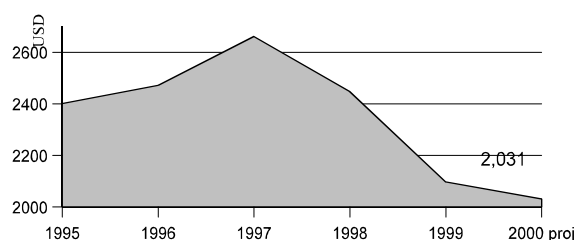
Changes in market structure, prices and income have occurred, pushed by changes in consumer tastes and consumption patterns and the rise in female participation in the labor force. The remarkably young population, changing lifestyles and expanding urban population (75 percent) should continue to stimulate demand. Domestic demand and household consumption are projected to increase by 4 and 6 percent, respectively, in 2000 and should continue to rise. Quick service and fast food restaurants, especially franchises, are expanding rapidly. Currently, away-from-home meals represent nearly 24 percent of food spending. High and upper-middle income groups are interested in foreign cuisine, leading to a higher demand for imported food products.

II. Economic Outlook

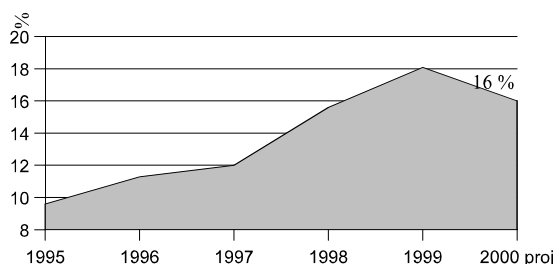
Economic Growth



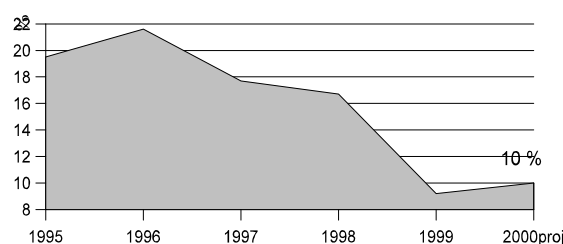
Per-Capita Income



Unemployment Rate



Inflation Rate



T The Colombian economy underwent a deep recession in 1999, as did most of Latin America.

T The Colombian peso was devalued by 22.2% in 1999, but has been relatively stable over the past six months.

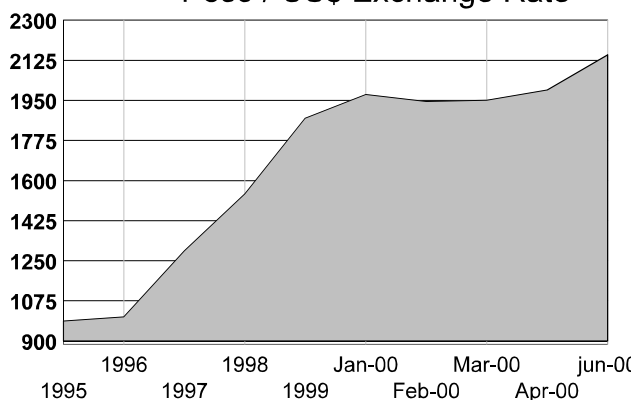
T Year 2000 is showing clear signs of recovery. Domestic demand and household consumption are projected to increase by 4% and 6% in 2000.

T The hotel and restaurant industry accounts for 2.2% of GDP and is expected to grow 5.1% in 2000.

T Economic statistics for the first six months of 2000 reinforce these estimates: GDP growth 3.8 %, inflation 7%, and the hotel and restaurant industry growth 5.4%.

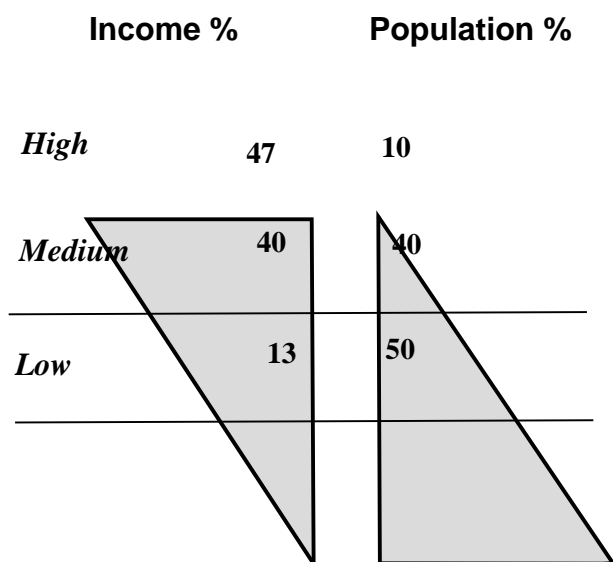
T The main constraint to continued economic recovery is social unrest and insecurity.

Peso / US\$ Exchange Rate



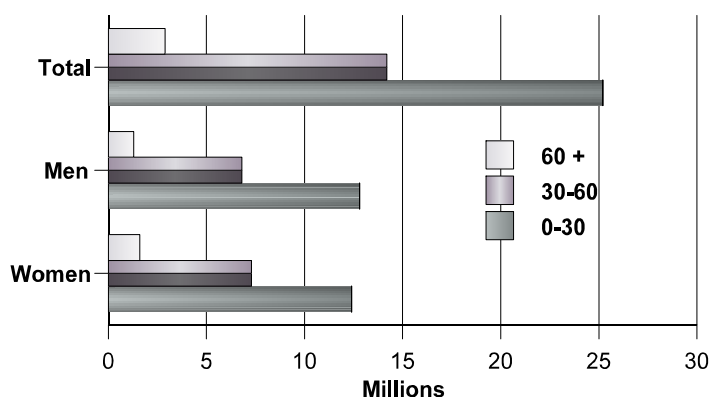
III. Market Overview

Income Distribution by Socio-Economic Group



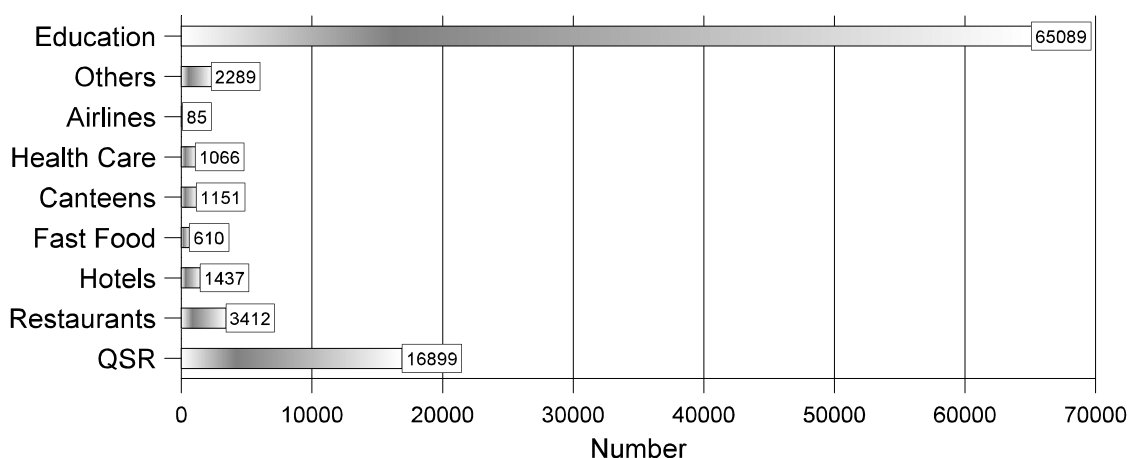
- T Colombia is a growing market of 41 million people.
- T Monthly food expenditures by income group are:
 - T High Ɀ \$300-600
 - T Middle Ɀ \$140-300
 - T Low Ɀ less than \$120
- T Medium and high-income groups spend around 5% of their income on hotel and restaurant services.
- T The decline in family income has shifted sales from top restaurants to fast food and lower-priced restaurants.
- T Medium to high-income groups are an attractive market for U.S. products.

Population by Age

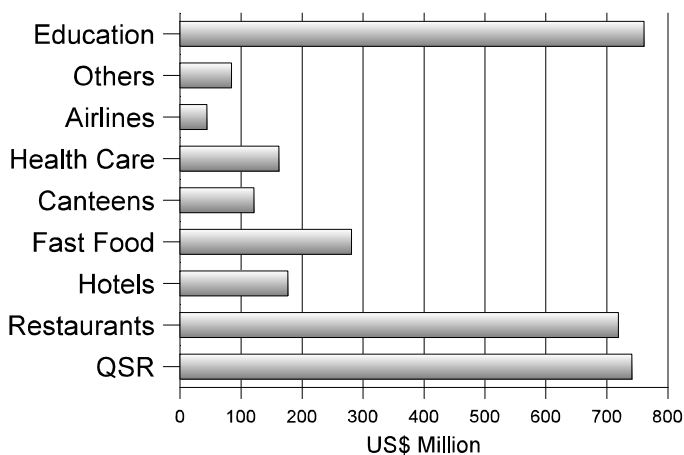


- U The rise in female participation in the labor force (28%) will continue to encourage demand for consumer-ready products.
- U With 75% of the population, concentrated in 23 urban areas, there is strong demand for consumer-ready food products and institutional food services in the education, medical, and recreation sectors.
- U The young population has stimulated the expansion of fast food and lower-priced restaurants.
- U There are 11.8 million students in Colombia, 29% of whom are enrolled in private schools, which generally provide food services.

Establishments in Colombia



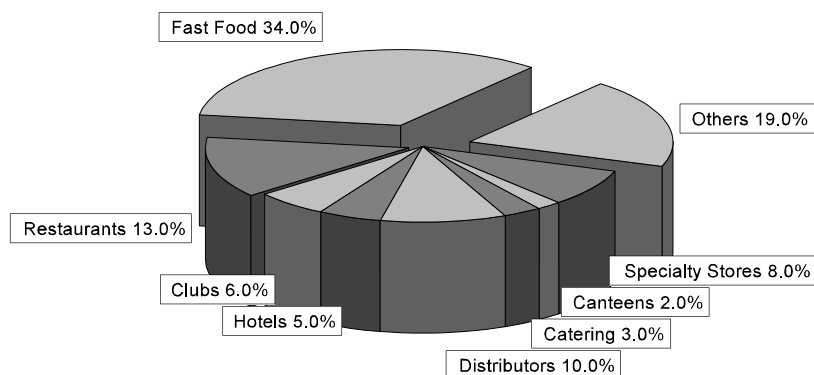
Sales by Categories



- T** There is no accurate information on HRI market sales in Colombia. Sales are estimated at \$2.5-3.0 billion.
- T** Consumption patterns in Colombia have changed toward ready-to-eat and ready-to-cook food products.
- T** Quick service and fast food restaurants represent almost one third of the market.
- T** First class restaurants reported a moderate decline in sales during 1999.
- T** Hotel occupancy rates are 39%, down from 48% in 1996. Business and social activities in hotel facilities are making up for some of the drop in room revenues.
- T** Food and beverage sales represent 32% of total hotel industry earnings.
- T** Luxury hotels, first class restaurants and fast food chains are the main buyers of imported products.
- T** There are 3.5 million students enrolled in private schools, many of whom pay an average of \$2 -3 per day for lunch.

Common Imported Food Products

Sales of Imported Products - Market Share

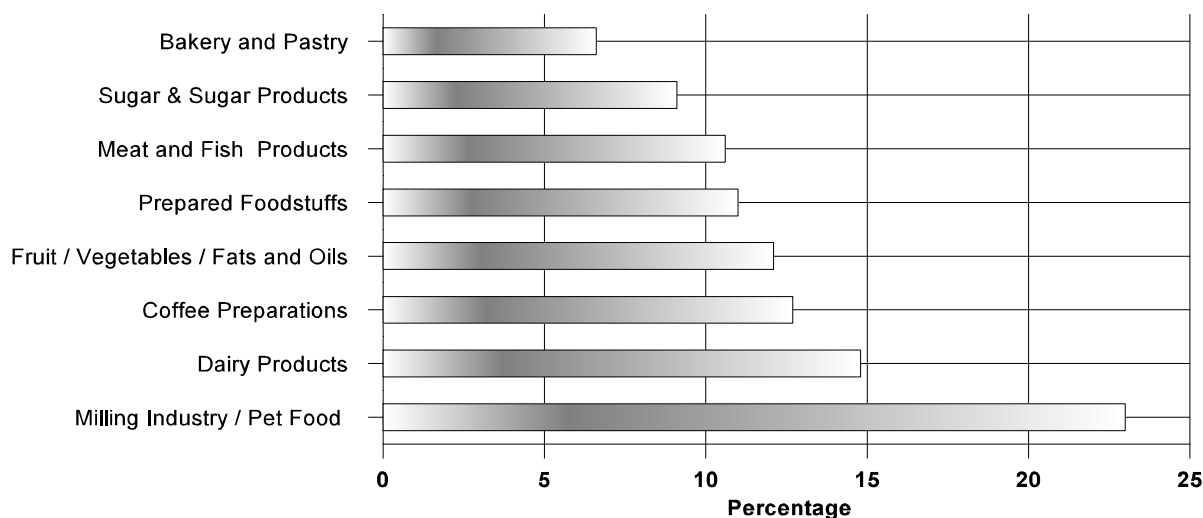


Seafood	Meats	Condiments	Bakery	Snacks	Vegetables	Dairy Products
Salmon Whitefish Caviar Anchovies Oysters Tuna	Beef Pork Ham Sausage Turkey Chicken	Chilli products Salad dressings Ketchup/mustard/ mayonnaise Spaghetti-pizza sauces Dry-mix sauces Saffron	Bagels Cake mixes Flavor enhancers Nuts Pudding/pies Fillings Pastry	Candies Crackers Biscuits Cereals Popcorn Jellies	Pulses Pickles Olives/Capers Pepper Artichokes Potatoes Oils Soups	Cheese Margarine Cream Syrup Cream(milk) Additives

- U** The HRI market has problems with getting consistent supplies of imported products.
- U** Domestic products are many times substituted for preferred imported product, because of lack of supplies.
- U** The presence of first-class hypermarkets has brought in a wide selection of high-quality competitively priced products from Europe. Alliances with European store chains, such as Casino and Danone, have intensified competition.
- U** As in most countries, Government institutions only purchase domestic food products. But, in the absence of appropriate local supplies, imported products may be used.

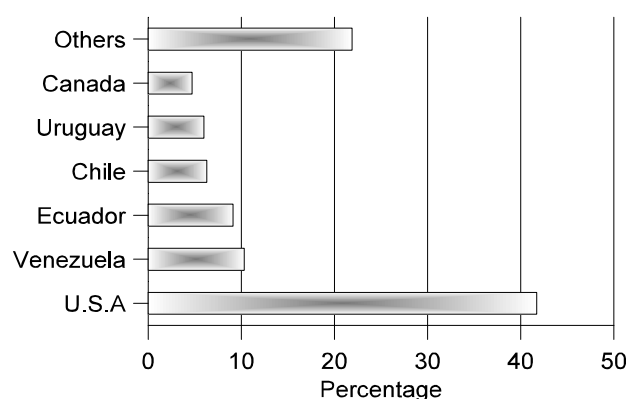
Colombian Food Production

Food Industry by Sector



- U Colombia is a strong producer of processed food products.
- U Foreign food processing affiliates account for a large portion of domestic processed food output. Some of them have their brand products produced by affiliates abroad.
- U The food industry is one of the largest sectors of the economy, accounting for 29% of industrial production.
- U Industrial output fell in 1999, dropping by 14.6%, due to financial strain and weaker demand.
- U Industry has begun to rebound. Expectations are for 7% growth in 2000.

Food Imports by Country



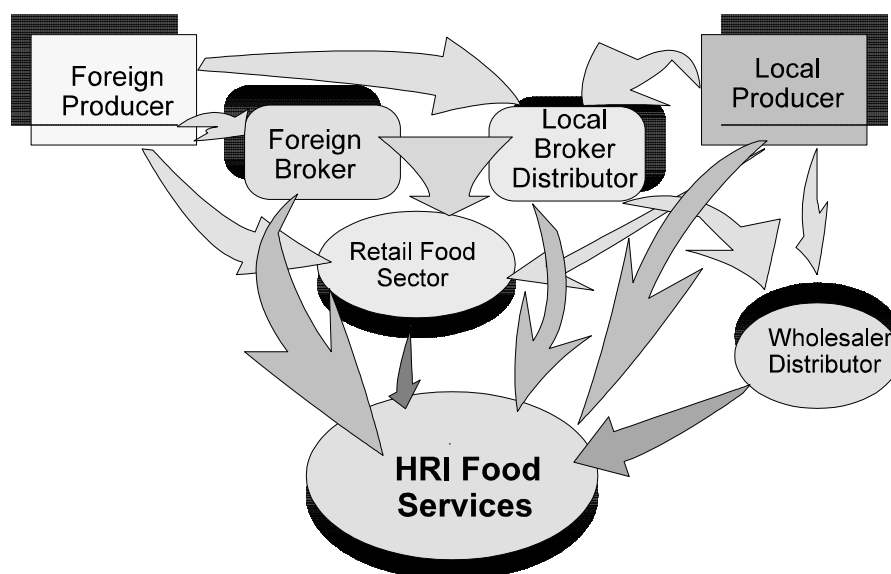
- T** Colombia is the largest market for U.S. food and agricultural products in Latin America after Mexico.
- T** In 1999, food and agricultural products were valued at \$1.3 billion, accounting for 12.9% of total Colombian imports.
- T** Colombia imported \$541 million in food and agricultural products from the U.S. in 1999, of which \$ 86.9 million was consumer-oriented products.
- T** Total import growth is forecast at 14%, after the sharp, 26% drop in 1999.
- T** Imported food products account for 15% of national consumption.

U.S. Processed Food Products Imported in 1999

PRODUCTS	\$ Million
Frozen Pork	7.9
Miscellaneous Food Preparations (syrops, preparations with vitamins or minerals)	5.7
Margarine	5.6
Processed Chicken Meat	4.9
Bread, Pastry, Cakes, and Biscuits	3.9
Vegetable Saps and Extracts/Hops	3.7
Frozen Juice Concentrates	2.8
Cat and Dog Food	2.5
Apples	2.3
Other Powdered Milk / Granules	1.7
Garlic	1.6
Frozen Beef	1.5
Fresh Pears	1.4
Dry Peas	1.4
Baby Food	1.2
Other Juices of Any Single Fruit or Vegetable	1.1
Breakfast Cereals	1.1
Seafood	0.8
Peaches and Nectarines	0.8
Fresh and Processed Cheese	0.8
Sparkling and Grape Wine	0.5

Source: DIAN

Distribution Channels



T The bulk of purchases from the U.S. are made through well-established local importers and distributors.
U Importers offered a full line of products to meet and create market needs. However, declining demand has forced them to reduce inventories and also the total number of items carried.

Illustrative List of Main Importers and Distributors

Importer	Products	Million
Italcol	Bakery products, meat, fats/oils of fish, oilseed meals	35.6
Compañía de Chocolates	Food preparations, active yeasts, cinnamon, flour, cereals	18.2
Nestle	Mucilages, thickeners, milk modifiers, salad dressings, candies, gums	16.0
Nabisco	Nuts, peanuts, biscuits, wafers and waffles	10.4
Mckey Colombia	Natural honey, meat, ham, cheese, potatoes, tomato juice	2.1
Colombina	Flours for ice cream and baking, glucose, powdered milk	1.8
Provyser	Cheese, sweet corn, frozen vegetables, preserved chicken	1.5
MEALS of Colombia	Frozen orange juice concentrate, ice cream bases, raisins	0.7
La Sabana	Smoked salmon, prepared meals, beef	0.3
FEDCO	Pistachios, frozen bread/pastry, mayonnaise	0.2
International and Food Service Group	Frozen/prepared beef, turkey, cheese, salad dressings, juices, spices, oil	0.3
Global Traders	Chewing gum, spices	0.1
Ibanez and Co.	Vitamin/fortified food preparations	0.1

Advantages for U.S. Companies and Products

- T The Colombian HRI food service market has great potential for growth driven by the tourism sector. Tourism is an important sector of the Colombian economy.
- T The U.S. continues to be the number one trading partner of Colombia. Imports from the U.S. account for 42% of food and agricultural imports.
- T Locally established multinational firms are taking advantage of their brand names to position new imported products oriented toward the HRI market.
- T Most popular U.S. made products are well regarded by Colombian consumers, because they are perceived as being of good quality and good nutritional value .
- T Colombia is implementing an aggressive tourism plan with programs specifically designed to attract foreign visitors. Vacation time-sharing plans are also becoming very popular. However, significant growth in international and domestic tourism will not occur until the internal security situation improves.
- T Several international hotel chains are present in Colombia. Services at Colombian hotels are comparable to international standards.
- T Most multinational fast food franchises are present in the market.
- T While the 1999 recession was tough on small traditional restaurants, the higher-class restaurant industry is doing well and is expected to show real growth in the year 2000.
- T The Peso devaluation makes Colombia very attractive to international tourists.
- T The remarkably young population has been stimulating the expansion of fast food chains and quick service restaurants in Colombia.
- T Changing lifestyles and the rise in female participation in the labor force are generating a growing demand for value-added food products and beverages.
- T Upscale and middle-income Colombian families are eating out more frequently, at least twice a month, devoting 24% of food spending for meals away from home.
- T Colombia's strategic geographical position helps serve other Latin America markets.

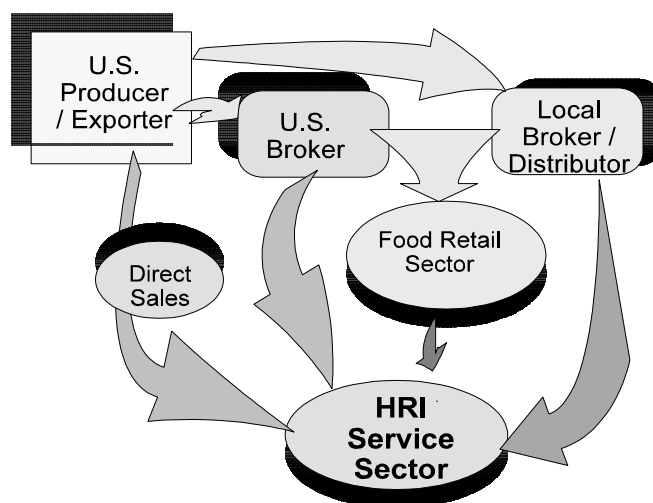
Challenges to U.S. Companies and Products

T	Consumption of processed food is low according to international standards and highly sensitive to price.
T	U.S. products will have to be of high quality, price competitive, and accompanied by efficient service to face increasing competition from other foreign products. Food products produced by the main Colombian food processing companies are of good quality and normally certified under ISO 9000/9001.
T	The HRI sector has benefitted from the arrival of world-class hypermarkets, such as Makro and Carrefour and AlKosto (Colombian), oriented toward serving institutional markets. They offer a wide variety of new and competitive priced products.
T	Erratic supplies of imported products are an ongoing problem for the Colombian HRI sector. U.S. companies that want to sell to key importers and hotel chains must guarantee consistent supplies.
T	U.S. companies must meet the needs of HRI. Importer/distributors usually must import mixed containers of products.
T	Although not required by law, Colombia, as most countries, has a strong campaign to convince companies to buy-Colombian.
T	Besides the basic duty, the Andean Community assesses a variable duty on 14 basic commodity groups and related products, or a total of 147 products. This system results in high and varying duties for a number of products such as pet food, poultry and cheese.
T	Absorption agreements to protect domestic production are another limiting factor for some U.S. products. Chicken, turkey and duck are subject to such restrictive measures.
T	Other non-tariff barriers to imported products are import licensing and sanitary and Phytosanitary certification (poultry). Food service operators want assurances that Colombian standards for food safety can be meet.
T	Some Colombian Trade Agreements with U.S. competitors make several U.S. products less competitive, such as zero duties on wine and apples from Chile and Brazilian wheat.
T	Customs clearance is still a cumbersome process, because of bureaucratic procedures.
T	The cold storage transportation network is very underdeveloped.
T	Despite GOC efforts, contraband products still produce a climate of unfair competition and disrupt sales of legally imported products.

Illustrative Import Duties for Food Products

Product	Basic Duty %	Basic plus Variable %
Chicken Parts, Frozen Turkey Parts / Duck / Goose	20	166
Pet Food	20	58
Powdered Milk / Cheese	20	55
Wine / Beer	20	none
Fruits and Vegetables	15	none
Raw Coffee , Tea and Spices	10	none

Market Entry Strategy



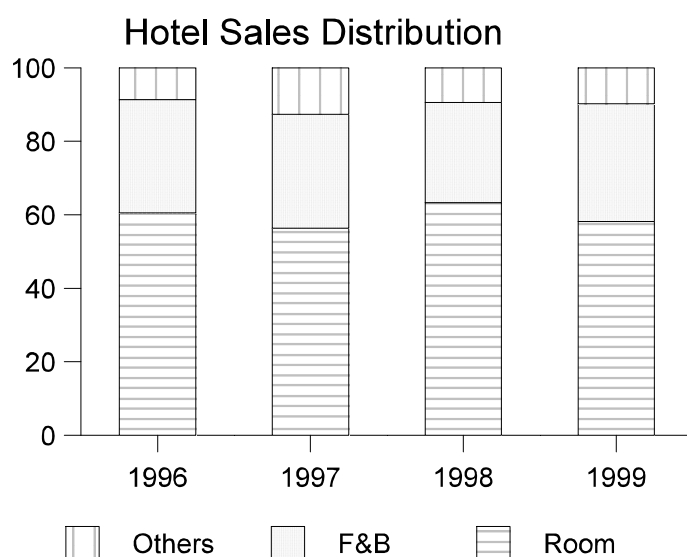
General Suggestions

- U** Base competitive position on the equation of high quality, competitive price and efficient service to face increasing foreign competition.
- U** US suppliers should develop a way to meet the needs of the Colombian market. Consolidation of the different relatively small orders with a variety of products into a large shipment should be an alternative.
- U** Establish direct relations with hotel and restaurant chains for large orders.
- U** Develop a relationship with top executives, i.e., marketing directors, purchasing managers, and expose them to U.S. business practices. Take advantage of domestic food fairs and exhibitions.
- U** Develop Spanish language marketing/communication material that highlights products and services available.

IV. Market Structure and Sub-Sector Profile

- U** International hotel chains are present in Colombia, with several new openings in the last five years. Services at luxury Colombian hotels are considered world class. In Colombia, there are 1,485 hotels with a total of 53,000 rooms.
- U** Colombian first-class restaurants offer cosmopolitan menus. There are also many first-class restaurants which offer ethnic dishes. Likewise, there are many fast food and quick service restaurants like McDonald's and Pizza Hut, which have captured a loyal following of Colombian consumers.
- U** The Institutional market is a sector with significant demand for food products. At present, however, it is not a significant market for imported products.

A. Hotels

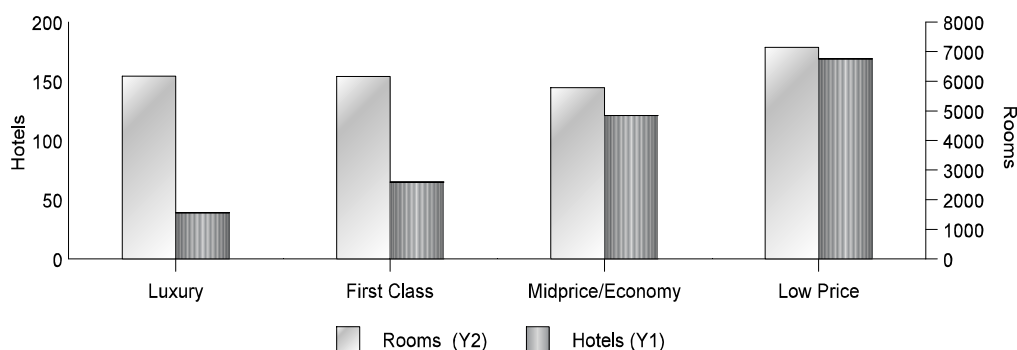


Hotel Sales \$Million		
	1998	1999
Total	741	754
Food & Beverages	202	241

Source: Cotelco

- U** Hotel sales account for 0.9% of Colombian GDP.
- U** The hotel occupancy rate for 1999 was 39%. 19% of hotel guests were foreigners.
- U** Hotels in Colombia generated 32% of revenue from food and beverage operations.
- U** Average room charge at a luxury hotel is \$65, ranging from a low \$55 to a high of \$150.
- U** Compared to world standards, Colombian luxury and first-class hotel room rates are low.

Hotels by Number and Size



Main Hotel Chains in Colombia

Company Name	Units	Location
Hoteles Estelar de Colombia	7	Bogota-Cali, Manizales, Cartagena
Hoteles Charleston	3	Bogota, Cartagena
Hoteles Royal	6	Bogota, Cali
Hoteles Limitada	10	(8) Bogota, Medellin, (2) Quito (Ecuador)
Administracion Hotelera Integral "A.I.H"	5	Medellin, Riohacha, Other cities
Grupo Hotelero Mar y Sol	3	Cartagena, Cucuta
Hoteles Irotama	1	Santa Marta
Hoteles Dann	10	Bogota, Cali, Bucaramanga, Medellin, Popayan
Ademser S.A.(Organizacion Hotelera German Morales)	8 2	Bogota, Santa Marta Miami

- U Colombian luxury hotels are the main buyers of food imported products.
- U The bulk of purchases from the U.S. are made through well-established importers.
- U Since hotels place small orders, they do not have strong price negotiating position.
- U Supplies of imported products is not consistent, since some importers do not carry sufficient stocks.
- U Hotels and restaurants have been forced to substitute similar domestic products for imported products which are not consistently available.
- U Hotels chains are highly interested in creating production and stock centers to lower costs and maintain steady supplies. Also, hotel chains are willing to associate to gain purchasing power to import directly. However, in practice, this is expensive and difficult.

International Hotel Chains in Colombia

Image Not Available

Company Name	Country	Units	Location
Accor - Sofitel (French)	France	3	Bogota, Cartagena, Ibague
Best Western	U.S.	1	Bogota
Days Inn	U.S.	1	Melgar (close to Bogota)
Decameron	U.S., Others	8	Cartagena, Santa Marta, San Andres
Embassy	U.S.	1	Bogota
Forte Travelodge	U.S.	5	Bogota, Cali, Ipiales, San Agustin
Four Points by ITT Sheraton	U.S.	3	Bogota, Medellin, Girardot
Hilton International	U.S.	1	Cartagena
Howard Johnson	U.S.	1	Bogota
Bass-Inter-Continental	England	3	Bogota, Cali, Medellin
Sol - Melia	Spain	6	Bogota, San Andres, Pereira, Santa Marta
Radisson	U.S.	1	Bogota

B. Restaurants

- U Quick service and fast food restaurants represent almost one third of the market.
- U First rate restaurants are also large consumers of imported food products.
- U First rate restaurants reported flat sales during 1999, losing some sales to fast food and quick service restaurants.
- U Fast food chains are expanding rapidly. They are very popular with Colombian consumers.
- U Fast food and quick service restaurants have become the solution for households that have no time to prepare traditional meals. They are also conveniently located around most major work areas for lunch-time consumers.
- U Competition among fast food chains is intense.
- U The \$85 million hamburger market is shared by the McDonald's, Presto, Del Corral, Burger King chains, among others. McDonald's plans to have 72 outlets by year 2002, up from 21 currently.

Main Fast Food Chains in Bogota

Name Company	Sales \$ Million	# outlets	Company	Sales \$ Million	# outlets
Kokorico, Arca, Avesco and Wendy's*(U.S.)	41.0	77	Alimentos Pinky	6.9	12
MacDonal's*(U.S.)	19.9	21	Cali Mio	5.8	12
Frisby	16.5	8	Cali Veja	4.1	10
Presto	15.7	33	Pizza Hut	4.1	7
Catering (Avianca)	9.8		Pollo-Pizza-Carne	2.5	9
El Corral	9.4	8	Charlie's Roastbeef Charlie Burgers	3.9	8
Brasa Roja	8.7	16	Lina's* (French)	1.0	1
Crepes and Waffles	8.4	13	T.G.I. Friday's *(U.S.)	2.0	1
Jenno's Pizza	7.8	41	A Todo Taco	2.4	12

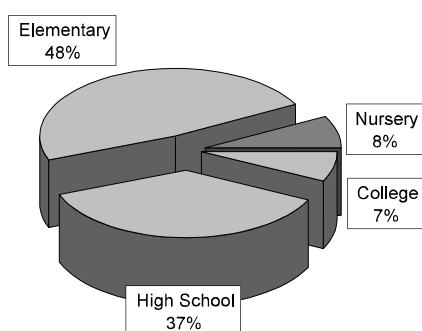
*Franchising

C. The Institutional Market

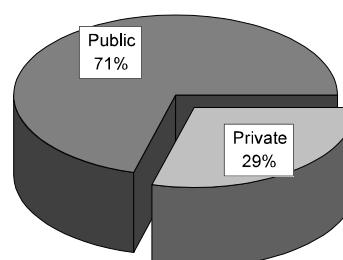
Procurement law regulates purchases and contracts by the government and state industrial and commercial enterprises. Given equal contracting conditions, the offer of goods and services of domestic origin is preferred. The GOC urges all-official entities, and government decentralized industrial and commercial organizations to "buy Colombian."

Education

Students by Educational Level



Students by Type of School



- U** There are 11.8 million students in Colombia, of which 3.5 million are enrolled in private schools.
- U** Most private schools serve lunch, obligatory at the elementary level and optional at the high school level. The price for an average school lunch is 2 to 3 dollars.
- U** There are food and beverage vending machines at some private schools and most universities.
- U** Sales of imported products in this sector are not currently significant. Nonetheless, there is a potential demand and opportunity for U.S. products and promising growth prospects in per capita consumption.

Colombian Government Programs

- T** Nearly 50% of the current student population is in elementary school
- T** The GOC sponsors several programs aimed at improving nutritional standards for children attending public schools. Children belonging to low-income families often have substandard nutritional levels.
- T** GOC food assistance programs, which provide a nutritionally balanced lunch supplement, reach around 4 million children up to 14 years of age, as well as nursing mothers.
- T** These programs are implemented by the Colombian Family Welfare Institute and all departmental educational offices. The annual ICBF budget is about \$16 million. Bogota's educational office budgeted \$13.6 million for food for the year 2000. This budget is projected to increase annually.

Health Care Institutions

- U** In Colombia, there are more than 60 hospitals with a capacity of more than 180 beds, for a total of 18,000 beds. The average food budget for a 200-bed hospital is around \$140,000 per year.
- U** The population-to-hospital bed ratio is approximately 500:1.
- U** U.S. products that are consistent with dietary and health recommendations and are competitively priced may find a market opportunity here.

Armed Forces Institutions

- U** Armed forces (police, army, marine and air force) budgets for food are significant, averaging \$68 million each annually.
- U** The daily per capita food budget per soldier is \$1.70.
- U** Armed forces directors are analyzing ways to improve the nutritional value of food rations, which, at the same time, are appetizing.

Amusement and Recreational Parks

- U** Are relatively new in Colombia. There are 12 large parks in the country.
- U** They attract large numbers of visitors, because of science and technology exhibits, as well as new amusement attractions.
- U** The sector has total food sales of around \$100,000 per year.

Social and Country Clubs

- U There are more than 100 urban and country clubs in Colombia.
- U Total club budgets for food are about \$2.4 million annually.
- U In 1999, clubs reported declines in sales and membership of nearly 15% and 10%, respectively.
- U However, clubs are the second best market for sophisticated and new imported products.

Typical Imported Products Used by Clubs

Salmon	Sausages	Bagels	Liquors
Whitefish	Hams	Saffron	Nuts
Caviar	Turkey	Spices	Pistachio
Anchovies	Olive oil	Salad Dressings	Cheeses
Other Seafood	Olives	Vinegar	Candies

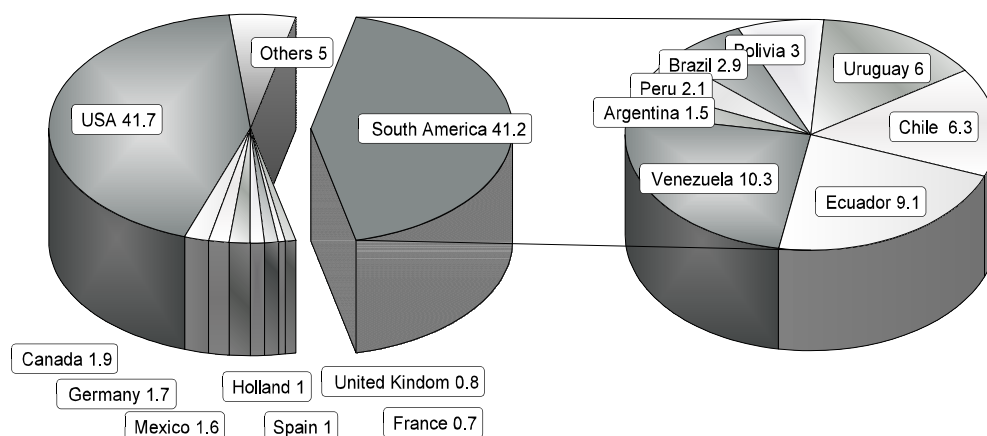
V. Competition

Colombia is a strong competitor in the production of:

Product	Company
Dairy products	Alpina, Colanta, Parmalat, Purace
Breakfast cereals	Kellog's, Nestle, Quaker
Snacks	Frito Lay, Savoy Brands, Margarita, Yupi
Baked foods	Levapan, Bimbo
Confectionary	Colombina, Noel, Warner Lambert
Oils and margarines	Unilever, Lloreda, Acegrasas, Gravetal
Dry mixes for sauces, mayonnaise, ketchup, mustard, jellies, condiments	Best Food, California, La Constancia, El Rey
Poultry feed and pet food	Purina, Finca, Contegral

- T Colombia grants preferential treatment to products from countries in the Andean Community. Also, bilateral agreements provide preferential duties to countries, such as Chile and Mexico.
- T U.S. products are relatively expensive compared to domestic products.
- T Some fast food chains bring their inputs directly from the U.S. to meet production standards defined under franchising agreements.
- T Because of Colombia's zero pathogen regulation, detections of Salmonella in U.S. chicken shipments have disrupted imports of frozen chicken, mainly mechanically deboned chicken.

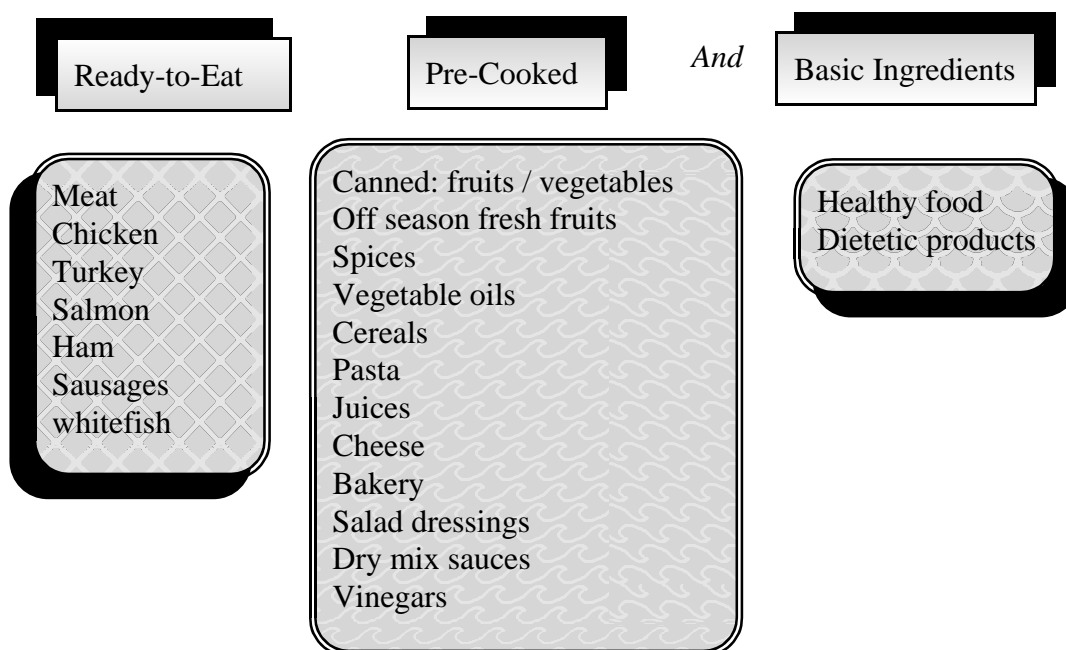
USA Competitors
Percentage



VI. Best Products Prospects:

- U** Due to recession, Colombian imports of processed food products declined in 1999, but the economy will grow by 3% in 2000, and prospects are improving for value-added food product imports.
- U** Imports play an increasingly important role in meeting consumer demand.
- U** The overall HRI market for imported products is still relatively small but has excellent potential.

There is significant space for new alternatives in...



VII. Related Reports

Other Related Reports

Report No.	Report Name	Date
CO0023	Food and Agricultural Import Regulations and Standards	07-13-00
CO0013	Agricultural Trade Policy Monitoring Report	04-13-00
CO0011	Sugar Annual Report	04-10-00
CO0003	Oilseeds and Products Annual Report	02-12-00
CO9027	Dairy Annual Report	10-19-99
CO9021	Poultry Annual Report	08-17-99
CO0018	Coffee Annual Report	05-15-00
CO8028	ALIMENTOS 98 Food Show	09-29-98

For further information, visit the FAS home page at <http://www.fas.usda.gov>.

IX. Post Contact Information

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