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Livestock

Livestock Annual-Revised

1999

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Report Highlights: Colombia's *cattle herd* is estimated at 18.8 million head in 1999, up one percent. *Cattle slaughter* is expected to be 667,000 tons of beef (3.7 million head), down one percent from last year. Imports of *cattle* were 3,434 head in 1998, down almost 50 percent. In 1999, 383 head (\$460,000) of U.S. purebred cattle were imported, down from 450 head in 1998. Imports of U.S. cattle are forecast to grow by ten percent annually.

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Executive Summary

The continuing insurgency problem and the current deep recession have both had a negative impact on the Colombian cattle industry in 1999. Colombia's *cattle herd* is estimated at 18.8 million head in 1999, one percent above 1998. *Cattle slaughter* in 1999 is expected to be 667,000 tons of beef (3.7 million head) about one percent lower than last year, with a further one percent reduction anticipated in 2000. Production of both *hides and skins and tallow* are expected to decline by one percent. Imports of *cattle* were 3,434 head in 1998, down almost 50 percent. In 1999, 383 head (\$460,000) of U.S. purebred cattle were imported, down from 450 head in 1998. However, imports of U.S. cattle are forecast to grow by ten percent annually because of increasing demand for high-quality U.S. animal genetics. Colombia again became a net hide exporter, shipping 6,713 tons (\$20 million) of hides and skins, almost a 50-percent reduction from last year. Italy accounts for about 45 percent of total skin exports.

Production

1. Production Factors

Colombia's *cattle herd* is estimated at 18.8 million head in 1999, one percent above 1998. Rural areas in Colombia continue to be under threat from guerrilla groups, which has forced many beef cattle ranches that are not close to urban areas to discontinue operations. These cattlemen have been relocating closer to urban areas where security may be better. Also, some ranchers are converting their beef operations into dairy farms and feed lots near urban centers.

Colombian beef output is subject to production cycles lasting from four to eight years. The current cycle is expected to last 7 years (1993-2000), with its production peak in 1998. Beef output the past decade increased only 1.6 percent annually. *Cattle slaughter* in 1999 is expected to be 667,000 tons of beef (3.7 million head) about one percent lower than last year, with a further one percent reduction anticipated in 2000. Increases in Colombia's beef production in the next 3-5 years are likely to be marginal, largely due to harassment of the ranching sector by guerilla groups. At the same time, demand for beef weakened in 1999, mainly because of the economic recession that Colombian is experiencing.

Production of *hides and skins* in 1999 is estimated at 3.7 million pieces, down one percent from a year earlier, in line with the cattle slaughter numbers. *Tallow* output in 1999 is estimated at 30,665 tons, also down one percent. Both these numbers are expected to decline by about one percent in 2000.

2. USDA-ICA Foot-and-Mouth Disease (FMD) Control Program

In 1973, the United States and Colombia signed an agreement to control and eradicate FMD in northwest Colombia, near the Colombian-Panamanian border (Urabá area). The program is administered by the Colombian Agriculture Institute (ICA) on the Colombian side and by USDA's Animal Plant Health Inspection Service (APHIS) on the U.S. side. The Urabá area, with about 500,000 head, was certified in mid-1997 to be free of FMD by the International Office of Epizootics in Paris.

This program has been extended to all of Colombia. In Colombia's Atlantic coast (northern coast)

96 percent of the cattle are being vaccinated against FMD, and the GOC expects to have it declared free of FMD by the end of 2000, encompassing a herd of about eight million head. However, to meet U.S. standards the area would have to be closed to the entrance of cattle coming from the rest of Colombia, which is unlikely. Colombia expects to expand this free zone to the entire country by 2005. Also, Colombia signed agreements with Ecuador and Venezuela in 1997 to coordinate control FMD in the three countries.

Colombia hopes that the acceptance of FMD free zones by the International Office of Epizootics will spur exports of both beef and live animals. Any increase in exports, however, is contingent upon an improvement in rural security, which is essential to allow growth in production.

Consumption

Consumption of *beef* in 1999 is expected to total 668,000 tons, down one percent from 1998. Consumption is being constrained by a reduced purchasing power of the Colombian consumer, due to the current severe recession, and a tendency for consumers to prefer poultry meat. In recent years, Colombia's meat consumption trends have shifted away from beef, due to lower poultry prices and a growing perception that red meat is less healthy than other meat alternatives.

Even with the reduction in beef output in 1999, *cattle prices* decreased seven percent in the July 1998-July 1999 period, which indicates that the decline in demand was even stronger. However, *beef prices* to the consumer increased 11 percent, higher than the nine percent growth in overall inflation, which suggests that price reductions to the grower are not always being passed on to consumers. A one percent reduction of beef price in July 1999, as compared to the previous month, may be an indication that consumer prices are beginning to soften. In July 1999, live weight prices for cattle were 1,690 pesos per kilo (\$0.42/lb), down seven percent from a year ago. Also in July, the retail price for an average cut of beef (loin roast) was 9,620 pesos per kilo (\$2.40/lb), 11 percent above a year earlier.

Consumption of *hides and skins* in 1999 is estimated at 92,000 tons, down one percent from 1998. Demand for these products remains depressed, because of reduced sales by the leather and shoe industries, due to increased competition from Asian countries.

About 80 percent of all *tallow* consumed in Colombia is used in the manufacture of soap. The remainder is evenly divided between animal feed and human consumption. During the last six years, tallow has faced increased competition from stearin in the local soap industry—all stearin used by soap manufacturers is produced domestically from palm oil. The local industry feels that stearin is just as good as tallow for soap manufacturing and base their purchasing decisions largely on price. Because stearin is readily available in the local market, soap manufacturers are also able to minimize their inventory levels and, therefore, reduce production costs. Soap producers typically hold no more than a two-week supply stearin, while they must carry a 3-4 month stock of tallow. However, since the price advantage in 1998 and 1999 tended to favor tallow, tallow use in Colombia remained the same in both years. A two percent increase is expected for 2000 and one or two percent increments are forecast for the following 3-5 years.

Trade

1. Exports

Cattle price differentials between Venezuela, Ecuador and Colombia result in a flow of cattle between these countries. In 1998, 139,740 head of cattle crossed over the border to Venezuela, most destined for slaughter. Only about 12,000 head of the animals exported were calves and steers for fattening and later return to Colombia.

Because of the presence of foot-and-mouth disease in Colombia, export markets for cattle and beef are restricted to countries which also have the disease. In the past, Colombia was a net exporter of **beef**. In recent years, however, beef exports have dropped precipitously from a record 23,770 tons in 1991 to only 3,951 tons (\$8 million) in 1998. Beef exports in both in 1999 and 2000 are estimated at 4,200 and 4,500 tons, respectively.

Beef exports to the Dutch Antilles and Aruba are relatively constant with about 1,000 tons each year. Venezuela and Peru also are important buyers of Colombian beef, but sales to these countries vary sharply. Beef exports are not projected to grow significantly over the remainder of the decade, since domestic Colombian prices for both live animals and beef are not usually competitive in world markets.

Colombia transitioned from being a net **hide** exporter to a net importer in 1992. Since then, hide imports have been declining, due to a steady drop in domestic demand. In 1998, Colombia again became a net hide exporter, shipping 6,713 tons (\$20 million) of hides and skins, almost a 50-percent increase from the previous year. A further expansion of hide exports to about 7,500 tons is projected for 1999. Hide exports are forecast to grow at a five percent annual rate each year for the next 3-5 years. Italy is Colombia's most important outlet for these products, accounting for about 45 percent of total exports.

2. Imports

Imports of **cattle** were 3,434 head in 1998, down almost 50 percent from the previous year. About half of the cattle bought in 1998 came from Brazil. In the last three years, imports of purebred Brahman cattle from that country have been growing, because Colombian cattlemen consider them better adapted to the tropical conditions of this country. In addition to the two types of foot-and-mouth disease (A and O) that Colombia has, a third type--C--exists in Brazil. Because of this, the GOC requires an additional quarantine before leaving Brazil.

In 1998, 1,269 head of slaughter cattle were imported from Ecuador. No cattle were imported from Venezuela in 1998. Cattle imports from Ecuador and Venezuela are rather variable, but the majority usually come from Ecuador.

The United States and Canada are normally the main sources of purebred cattle. In recent years, imports of U.S. cattle (all purebred) into Colombia have consisted of Brahman (55 percent), Holstein (35 percent), and Jersey, Brown Swiss and Simmental (10 percent). In 1998, 383 head (\$460,000) of cattle were purchased from the United States and an estimated 450 head will be imported in 1999. Imports of U.S. cattle are forecast to grow at about ten percent annually over the next 3-5 years, as Colombian cattlemen persist in their efforts to improve the genetic base of their cattle.

Because of a liberalized import policy implemented in 1991, a market for imported **beef offals** has

developed. Colombian beef offal imports grew from 852 tons in 1991 to 3,853 tons (\$2.7 million) in 1998. Initially, all offal imports were supplied by the United States but, in 1996, the Canadian Meat Inspection Service was approved by Colombia, opening the doors to that market. Because of attractive Canadian prices, Colombian importers shifted much of their buying activity to Canada. Canada's share of the Colombian import market for offals now accounts for about 20 percent of total imports. Domestic offal consumption is stimulated by its lower prices compared to beef. U.S. beef offal exports to Colombia are forecast to grow at an annual rate of 3 percent in the near-term.

Competition for offals/meats from other Andean Community countries (Venezuela, Ecuador, Peru, and Bolivia) is not likely to occur in the near future, as export prices from these countries are similar or higher than those in the Colombian market. If the Andean Community and Mercosur eventually merge, imports from Argentina and Brazil would become increasingly price competitive, due to the phased reduction in duties on products originating from these countries.

Historically, Colombia's *beef* imports have been minimal. Previously imports were destined almost exclusively for the Colombian island of San Andres, a free port located about 500 miles offshore in the Caribbean Sea. However, high domestic prices for beef and trade liberalization policies initiated in 1991 opened the door for beef imports. Beef imports began in 1995 with 1,968 tons (\$1.8 million) and have risen to 4,000 tons (\$7 million) in 1998. Panama accounts for half of these imports. Costa Rica supplies 20 percent and Argentina an additional 12 percent.

Despite the high quality of U.S. beef, sales to Colombia are constrained by the relatively high price of the U.S. product. However, a market among exclusive hotels and restaurants is opening and in 1998, Colombia imported 840 tons valued at \$1.2 million of high-value U.S. beef cuts. We anticipate an annual sales growth rate of 10 percent over the next several years, as this market continues to expand.

In the past two years, cattle growers have been asking the GOC to establish variable import duties for beef, under the Andean Price Band system, as a means of limiting imports. The Andean Community consists of Colombia, Venezuela, Ecuador, Peru and Bolivia. However, the GOC has been reluctant to take this action, since it would likely result in higher consumer prices for a sensitive food item.

About 30 percent of the country's beef is marketed in urban supermarkets. The bulk of the remainder is sold through specialized butcher shops. Only one percent of all red meat sold in Colombia is marketed through restaurants. Virtually all beef imported from countries other than the United States is used in the manufacture of sausages. Imported red meat usually is purchased by specialized brokers on behalf of local meat processors. These brokers earn a commission for their services.

Following the GOC's import liberalization program, imports of *hides and skins* surged in 1992 and 1993 to 11,169 tons and 17,927 tons, respectively. Strong competition in Colombia's domestic and export markets from leather products supplied by Asian competitors, has resulted in a marked decline in leather article output and, consequently, hide and skin imports have fallen. Colombia imported only 3,184 tons (\$13 million) in 1998. Venezuela and Brazil are the principal suppliers, accounting for 48 and 36 percent, respectively, of all hide and skin imports. The United States supplies higher quality hides and skins to Colombia and accounts for about four percent of purchases.

Colombia has traditionally ranked as the fourth largest world export market for the U.S. *tallow*.

Usually, all tallow is imported from the United States, but in the previous two years Colombia bought five percent from the United Kingdom, as prices were more competitive. Depending on prices, Colombian soap manufacturers have been substituting locally produced stearin for tallow imports in their production formulas since 1995.

Tallow imports surged 34 percent to 61,260 tons in 1998, with a value of \$25 million. The reasons for this surge were the sharp decline in world prices for tallow and very low import duty levels of only 5 percent, resulting from the application of the Andean Community's price band. However, during 1999 import duties for tallow have been increasing and now they are at a high of 93 percent. This is expected to result in a reduction of tallow imports to about 45,000 tons, with domestic stearin being substituted for tallow.

The GSM-102 credit guarantee program was used for a number of years to purchase U.S. tallow, but was discontinued in 1997, because soap manufacturers could obtain credit easily from local banks and U.S. suppliers. In June 1999 the GSM-102 program was closed for Colombia, because a local bank defaulting payment. A reopening of the program is not foreseen, until the situation in the Colombia banking sector improves.

Policy

1. Export

The GOC provides an export *subsidy* for hides and skins equivalent to 2.25 percent of the FOB export value. A subsidy of 4.5 percent is available for tallow exports, but the local industry continues to market all of its product domestically. Beef and cattle exports do not receive an export subsidy. The GOC intends to eventually eliminate all these subsidies and has been gradually reducing them.

2. Import

Non-tariff Barriers: Colombia generally requires certification of each foreign meat processing plant that seeks to export to Colombia. Canada and the United States are exceptions to this rule. For these two countries, Ministry of Agriculture officials visit a sample of plants and then authorize all plants operating under the host countries inspection system to export to Colombia (ICA resolution 2235/95). In the case of the United States, export approval is valid for two years. Current eligibility period expires on October 5, 1999. A new ICA visit is being prepared by ICA, FAS, and USDA/W. That visit would extend authorization through 2001.

No other significant non-tariff barriers are applicable to the importation of U.S. livestock and its products.

Tariffs: With the exceptions described below, purebred dairy and beef *cattle* are assessed an import duty of 5 percent. Cattle imported for bullfights and slaughter are assessed an import duty of 10 percent. In general, all red meat is assessed an import duty of 20 percent. Imports of hides and skins are assessed a 5 percent import duty when raw and 10 percent when tanned.

Tallow is subject to a variable import duty under the Andean Community price band system. The

basic tariff rate for tallow is 15 percent. However, the actual duty applied to tallow is the same assessed on palm oil. For the first half of August 1999 the duty will stand at a high of 93 percent of the cif value of the importation.

When traded between Andean Community countries, all of the above products are exempt from import duties. Colombian tallow imports from ALADI countries (South America and Mexico) are assessed a 7.5 percent import duty.

Under an export promotion scheme--*Plan Vallejo*--imported products destined for use in the manufacture of goods which will be exported later (excluding Andean Community countries) are eligible for entry into Colombia free of duties and taxes.

Marketing

Despite vexing problems in Colombia's livestock sector, there is a demand for imported *purebred* Holstein and Brahman, and to a lesser extent for Jersey, Brown Swiss, and Simmental.

The Office of the Agricultural Attaché has been actively supporting the promotion of Angus cattle in Colombia. Twenty-two young Angus bulls were imported in 1997 and exhibited at the National Agricultural Fair in Palmira. In 1999, another 24 Angus bulls were brought into Colombia and five of them were exhibited at the National Agricultural Expo in Bogota in July. The Angus breed is not well known in Colombia but offers good sales potential for U.S. exporters, especially as a cross with Brahman.

Colombia imports high quality *hides and skins* and this market is expected to grow in the near future as domestic manufacturers attempt to expand exports of good quality leather articles.

Promotional activities by the U.S. meat export federation and fas/bogota have made *American high quality beef* known to customers of exclusive hotels and restaurants. Imports of this product are likely to expand in the near future.

Import Requirements

1. Import Requirements for Meat - Not Transformed (fresh, chilled or frozen)

A transformed product is defined by the GOC as having been subjected to processing that resulted in a change in its internal structure.

1. The Colombian importer must register his company with INCOMEX. This grants Government of Colombia authorization to the company to import any and all agricultural products.
2. The importer purchases an import license form at INCOMEX (cost 24,000 pesos or \$17).
3. The importer presents to ICA his completed import license form and is issued a health permit (cost 16,000 pesos or \$11.50). This process normally takes about 48 hours.
4. The importer presents the completed import license form and the ICA health permit to INCOMEX. INCOMEX will now issue an import license approval. This process normally takes 48 hours.

5. Selected products are subject to inspection prior to shipment for product and price validation. This inspection is carried out by private companies contracted by the GOC.
6. The imported meat product is inspected by an ICA veterinarian upon arrival in Colombia. The ICA official ensures that the product comes from U.S. inspected production facilities, is free of disease, has been inspected by USDA prior to its shipment, and is accompanied by a USDA health certificate.
7. If the meat is sold in retail packages, it must be labeled. Labels must be in Spanish and contain the product name, name and address of importer, name and address of producer, net contents in metric units, list of ingredients, Ministry of Health registration number, recommended method of storage, and product expiration date. This information may be provided by the application of a sticker to the package.
8. All meats are assessed a 20 percent import duty. Poultry meat and pork are also subject to a variable surcharge under the price band system. Currently, total import taxes stand at 94 percent for poultry meat while pork enters duty-free.

Note: Registration of product with the Ministry of Health (INVIMA) is not required for non-transformed food products.

2. Meat - Transformed (fresh, chilled or frozen)

1. The Colombian importer must register his company with INCOMEX. This grants Government of Colombia authorization to the company to import all agricultural products.
2. The product must be registered with INVIMA, the National Institute for the Surveyance of Food and Medicines. This registration can be done by either the exporter or the importer. INVIMA registration requires: (a) A written document from the manufacturer stating that they manufacture the listed products and (b), A certificate of free sale stating that the products are approved for human consumption in the United States. This certificate needs to be issued by a U.S. Government (state, local or federal) health authority. Although not required, INVIMA registration is facilitated if a description of the manufacturing process and a list of the ingredients, including any additives, preservatives, and colorings. All documents need to be notarized by the Colombian embassy in the United States or a consulate and by the Ministry of Foreign Affairs in Bogota. These documents also need to be translated into Spanish by an official translator approved by the Ministry of Foreign Affairs. A sample label may also be submitted. An INVIMA registration fee must be paid. This fee includes analysis of the product. Product does not need to be analyzed before registration approval is given. Cost depends on the item, but it is about \$700. After all the required documentation is submitted, product registration by INVIMA takes about three working days.

INVIMA registration is valid only for the applicant (exporter or importer) and the manufacturer specified in it. Whenever the U.S. exporter wants to change its Colombian importer, there are two cases:

(a) In case the U.S. exporter is the applicant for INVIMA registration, he must submit an application for modification to INVIMA (cost 45,000 pesos or about \$25).

(b) In case the Colombian importer is the applicant, the U.S. exporter must initiate a new registration process, specifying his new importer(s). Afterwards, he may change his importer(s) whenever he deems it advisable. The U.S. exporter must apply through his legal

representative in Colombia or a lawyer.

3. The importer purchases an import license form at INCOMEX (cost 24,000 pesos or about \$13).
4. The importer presents INCOMEX completed form to INVIMA for clearance. This process normally takes about 48 hours.
5. The importer presents the completed INCOMEX form and INVIMA clearance to ICA (cost 16,000 pesos or about \$9). ICA issues a health permit. This process normally takes about 48 hours.
6. The importer presents the completed INCOMEX form, INVIMA clearance and ICA health permit to INCOMEX. INCOMEX will now issue an import license approval. This process normally takes about 48 hours.
7. Selected products are subject to inspection prior to shipment for product and price validation. This inspection is carried out by private companies contracted by the GOC.
8. If the meat is sold in retail packages, it must be labeled. Labels must be in Spanish and contain the product name, name and address of importer, name and address of producer, net contents in metric units, list of ingredients, Ministry of Health registration number, recommended method of storage, and product expiration date. This information may be provided by the application of a sticker to the package.
9. High value food products are assessed a 20 percent import duty.

Note: the Ministry of Agriculture must approve chicken, or other poultry, part imports. Whenever the Ministry determines that domestic supplies are available to meet local demand and/or that imports of this product would economically damage local poultry industry, imports are not approved. Imports of chicken parts which undergo minimal processing, such as those sprinkled with paprika, are not allowed.

3. Import Requirements for Cattle

1. The Colombian importer must register his company with INCOMEX. This grants Government of Colombia's authorization to the company to import any and all agricultural products.
2. The importer purchases an import license form at INCOMEX (cost 24,000 pesos or about \$13).
3. The importer presents to ICA his completed import license form and is issued a health permit (cost 16,000 pesos or about \$9). This process normally takes about 48 hours.
4. The importer presents the completed import license form and the ICA health permit to INCOMEX. INCOMEX will now issue an import license approval. This process normally takes 48 hours.
5. The exporter in the United States must obtain a USDA health certificate, which states:
 - a. The United States is free of foot-and-mouth disease, contagious bovine pleuropneumonia, and rinderpest.
 - b. Cattle originated from premises where no clinical diagnosis of bovine leukosis, campylobacteriosis, trichomoniasis, infectious bovine rhinotracheitis (IBR), parainfluenza (PI3), bovine virus diarrhea (BVD), paratuberculosis, brucellosis, coital exanthema, malignant catarrhal fever, Aujeszky's disease, bluetongue, and Q fever has been made in the 12 months prior to this exportation.
 - c. Cattle were treated twice during the 30 days prior to exportation for the removal of internal and external parasites.

- d. Cattle were isolated from all other animals not tested for export from the first day of testing until embarkation.
 - e. Cattle will be transported from the isolation premises to the port of embarkation in cleaned and disinfected vehicles.
 - f. None of the cattle originate from premises under any type of State or Federal quarantine for animal diseases.
6. Animals must test negative for the following diseases within 30 days of embarkation, except tuberculosis, whose negative test is valid for 60 days:
- Tuberculosis: intradermal caudal fold test using bovine PPD tuberculin.
 - Brucellosis: Nonvaccinated animals over 6 months of age shall be negative to the standard plate or the standard tube agglutination test at 1:25 dilution (less than 30 IU/ml). Vaccinated animals under 20 months of age and nonvaccinated animals under 6 months of age are not required to be tested. Vaccinated females over 20 months of age shall be negative to the standard plate or standard agglutination test at the 1:50 dilution.
 - Bovine leukosis: negative to agar gel immunodiffusion (AGID) test.
 - Leptospirosis: negative to the microtiter agglutination test at 1:100 dilution for *L. icterohaemorrhagiae*, *L. pomona*, *L. canicola*, *L. grippotyphosa*, and *hardjo*.
 - Paratuberculosis: negative at 1:8 dilution by the complement fixation test or to the intradermal johnin test.
 - Campylobacteriosis and trichomoniasis: negative to a direct microscopic exam or culture test. No test is required for virgin bulls and heifers, or artificially bred heifers.
 - Infectious bovine rhinotracheitis (IBR/IPV): negative at a 1:2 dilution by the serum neutralization test.
 - Bovine virus diarrhea (BVD): negative to a serum neutralization test at a 1:2 dilution.
- All laboratory tests must be done by official laboratories. Special tests recommended by the Yearbook of Animal Health of FAO/OIE or any other international animal health organization may be required.
7. Cattle entering Colombia from the United States must have been vaccinated as follows:
- Females with reduced dose Brucellosis Strain 19 vaccine, according to the nationally accepted U.S. usage standards.
 - Leptospirosis bacterin or treated with dihydrostreptomycin at a dosage of 25 mg/kg. Vaccination can be substituted for the test requirement. This vaccination must be administered at least 20 days prior to embarkation.
 - Killed/modified live vaccine for IBR/PI3/BVD. Vaccination can be substituted for the test requirement. A modified live virus nasal vaccine or killed virus vaccine must be administered at least 20 days before embarkation.
 - Anthrax, within a time lapse of 1 to 6 month prior to embarkation, if this disease exists in the area of origin.
 - Animals over 3 months of age, must be vaccinated against blackleg and malignant edema, between 1 and 6 months prior to shipment.
7. Upon arrival in Colombia ICA (Colombian Agricultural Institute) may require that any or all tests conducted in the United States be repeated.
8. Upon arrival in Colombia cattle must be inspected by ICA animal health officials.
9. Purebred dairy and beef cattle are assessed an import duty of 5 percent. Cattle imported for bullfights and slaughter are assessed an import duty of 10 percent.
10. Upon arrival in Colombia, cattle must remain in quarantine for 30 days. The importer can arrange to quarantine his cattle on ICA or private premises. The expenses, including the laboratory tests required by ICA, are charged to the importer. (Cattle imported from Brazil, because of the type C of foot-and-mouth disease that Colombia does not have, are subjected

to tests that must be negative to this virus kind and to a 30-day quarantine both in Brazil and Colombia.)

Potential importers

1. Beef Cattle

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TABLES

Colombia: Animal Numbers, Cattle Production, Supply and Demand (1,000 head)

PSD Table						
Country:	Colombia					
Commodity:	Cattle, Animal Numbers					
	1,998		1,999			2,000
	Old	New	Old	New	Old	New
Calendar Year Begin						
Total Cattle Beg. Stks	18,631	18,631	18,807	18,849	0	19,111
Dairy Cows Beg. Stocks	2,470	2,470	2,540	2,470	0	2,620
Beef Cows Beg. Stocks	7,160	7,160	7,230	7,160	0	7,300
Production (Calf Crop)	4,705	4,805	4,800	4,830	0	4,860
Intra EC Imports	0	0	0	0	0	0
Other Imports	25	15	25	10	0	8
TOTAL Imports	25	15	25	10	0	8

TOTAL SUPPLY	23,361	23,451	23,632	23,689	0	23,979
Intra EC Exports	0	0	0	0	0	0
Other Exports	9	140	8	80	0	90
TOTAL Exports	9	140	8	80	0	90
Cow Slaughter	1,500	1,490	1,500	1,470	0	1,470
Calf Slaughter	0	0	0	0	0	0
Other Slaughter	2,250	2,227	2,350	2,228	0	2,240
Total Slaughter	3,750	3,717	3,850	3,698	0	3,710
Loss	795	745	800	800	0	810
Ending Inventories	18,807	18,849	18,974	19,111	0	19,369
TOTAL DISTRIBUTION	23,361	23,451	23,632	23,689	0	23,979
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Estimate: 1999.

Forecast: 2000.

Source: DANE (National Statistics Bureau) and FEDEGAN (Colombian Cattle Growers Federation).

Colombia: Meat, Beef and Veal. Production, Supply and Demand
(1,000 head and 1,000 tons)

PSD Table						
Country:	Colombia			1,000	<-Conversion factor for CWE	
Commodity:	Meat, Beef & Veal					
		1,998		1,999		2,000
	Old	New	Old	New	Old	New
Calendar Year Begin		01/1998		01/1999		01/2000
Slaughter (Reference)	3,750	3,717	3,850	3,698	0	3,670
Beginning Stocks	23	23	29	23	0	23
Production	690	671	702	667	0	662
Intra EC Imports	0	0	0	0	0	0
Other Imports	4	4	5	5	0	6
TOTAL Imports	4	4	5	5	0	6
TOTAL SUPPLY	717	698	736	695	0	691
Intra EC Exports	0	0	0	0	0	0
Other Exports	2	3	2	4	0	4
TOTAL Exports	2	3	2	4	0	4
Human Dom. Consumption	686	672	703	668	0	671

Other Use, Losses	0	0	0	0	0	0
TOTAL Dom. Consumption	686	672	703	668	0	671
Ending Stocks	29	23	31	23	0	16
TOTAL DISTRIBUTION	717	698	736	695	0	691
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Estimate: 1999.

Forecast: 2000.

Source: DANE (National Statistics Bureau) and FEDEGAN (Colombian Cattle Growers Federation).

Colombia: Cattle Prices, (Colombian pesos per kilo)

Prices Table					
Country:	Colombia				
Commodity:	Cattle				
Year:	1997				
Prices in (currency)	pesos	per (uom)	kilo		
Year	1996	1997	% Change		
Jan	1,424	1,735	21.8%		
Feb	1,491	1,674	12.3%		
Mar	1,558	1,686	8.2%		
Apr	1,679	1,699	1.2%		
May	1,740	1,688	-3.0%		
Jun	1,809	1,658	-8.3%		
Jul	1,812	1,690	-6.7%		
Aug	1,730		-100.0%		
Sep	1,722		-100.0%		
Oct	1,725		-100.0%		
Nov	1,703		-100.0%		
Dec	1,671		-100.0%		

Average monthly prices for an indicative market: Medellín.

Prices for live cattle for slaughter, grade 1a.

Exchange rate (Colombian pesos/US\$): 1,810 (8/2/99).

Colombia: Meat, Beef and Veal Prices (Colombian pesos per kilo)

Prices Table			
Country:	Colombia		
Commodity:	Beef		
Year:	1999		
Prices in (currency)	pesos	per (uom)	kilo
Year	1998	1999	% Change
Jan	6,700	9,700	44.8%
Feb	7,060	10,500	48.7%
Mar	7,420	10,550	42.2%
Apr	7,800	10,000	28.2%
May	8,140	9,580	17.7%
Jun	8,400	9,700	15.5%
Jul	8,650	9,950	15.0%
Aug	8,900		-100.0%
Sep	8,900		-100.0%
Oct	8,900		-100.0%
Nov	8,900		-100.0%
Dec	8,900		-100.0%
Exchange Rate	1,830	(Local currency/US \$)	
Date of Quote	30-Jul-99	(MM/DD/YY)	

Prices for loin cut ("chatas").

Source: Banco Ganadero.

Colombia: Cattle Exports, 1997-98 (Head)

Export Trade Matrix		Animal Numbers		
Country:			Units:	Head
Commodity:			Partial Begin:	Jan
			Partial End:	
Exports for	1997	1998	1998	
	Full	Full	Partial	Full
U.S.				
Others				
Venezuela	20,077	139,740		
Total for Others	20,077	139,740	0	0
Others not listed				
Grand Total	20,077	139,740	0	0

Source: DANE (National Statistics Bureau).

Colombia: Cattle Imports, 1997-98 (Head)

Import Trade Matrix		Animal Numbers		
Country:	Colombia		Units:	Head
Commodity:	Cattle, Animal Numbers		Partial Begin:	Jan
			Partial End:	
Imports from:	1997	1998	1998	
	Full	Full	Partial	Full
U.S.	495	383		
Others				
Venezuela	4,340	46		
Brazil	949	1,560		
Ecuador	143	1,269		
Canada	260	167		
Spain	98			
Germany	9	9		
Total for Others	5,799	3,051	0	3,051
Others not listed				
Grand Total	6,294	3,434	0	3,434

Source: DANE (National Statistics Bureau).

Colombia: Beef Exports, 1997-98 (Tons)

Export Trade Matrix		Meat		
Country:	Colombia		Units:	MT CWE
Commodity:	Meat, Beef, and Veal		Partial Begin:	Jan
			Partial End:	
Exports for	1997	1998	0	0
	Full	Full	Partial	Full
U.S.				
Others				
Venezuela	190	2,460		
Dutch Antilles	830	890		
Aruba	120			
Total for Others	1,140	3,350	0	0
Others not listed				
Grand Total	1,140	3,350	0	0

Source: DANE (National Statistics Bureau).

Colombia: Beef Imports, 1997-98 (Tons)

Import Trade Matrix		Meat		
Country:			Units:	MT CWE
Commodity:	Meat, Beef and Veal		Partial Begin:	Jan
			Partial End:	
Imports for	1997	1998	0	
	Full	Full	Partial	Full
U.S.	38	840		
Others				
Costa Rica	284	475		
Panama	1,493	2,540		
Venezuela	71			
Argentina	1,175	76		
Total for Others	3,023	3,091	0	0
Others not listed	2	20		
Grand Total	3,063	3,951	0	0

Source: DANE (National Statistics Bureau).

Colombia: Hides and Skins, Bovine. Production, Supply and Demand (1,000 tons)

PSD Table						
Country:	Colombia			25 k	<MT piece conversion	
Commodity:	Hides & Skins, Bovine					
	1,998		1,999		2,000	
	Old	New	Old	New	Old	New
Calendar Year Begin	01/1998		01/1999		01/2000	
Beginning Stocks	8	8	13	7	0	6
Production In MT	91	93	96	92	0	92
Production In Pieces	3,624	3,717	3,850	3,698	0	3,670
Intra EC Imports	0	0	0	0	0	0
Other Imports	10	4	0	4	0	5
TOTAL Imports	10	4	0	4	0	5
TOTAL SUPPLY	109	105	109	103	0	103
Intra EC Exports	0	0	0	0	0	0
Other Exports	3	7	0	8	0	8
TOTAL Exports	3	7	0	8	0	8
Domestic Consumption	93	91	93	89	0	89
Ending Stocks	13	7	16	6	0	6
TOTAL DISTRIBUTION	109	105	109	103	0	103
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Source: DANE (National Statistics Bureau).

Colombia: Hide and Skin Exports, 1998 (Tons)

Export Trade Matrix			
Country:	Colombia	Units:	Tons
Commodity:			
Time period:	1998		
Exports for	1998		1999
U.S.	249	U.S.	
Others		Others	
Italy	3675		
Hong Kong	553		
Taiwan	543		
Venezuela	409		
Spain	366		
Belgium	267		
Ecuador	183		
Total for Others	5996		0
Others not listed	468		
Grand Total	6713		0

Source: DANE (National Statistics Bureau).

Colombia: Hide and Skin Imports, 1998 (Tons)

Import Trade Matrix			
Country:		Units:	Tons
Commodity:			
Time period:	1998		
Imports for	1998		1999
U.S.	184	U.S.	
Others		Others	
Venezuela	1008		
Ecuador	835		
Brazil	653		
Chile	154		
Canada	105		
Argentina	31		
Total for Others	2786		0
Others not listed	214		
Grand Total	3184		0

Source: DANE (National Statistics Bureau).

Colombia: Tallow Production. Production, Supply and Demand, 1998-2000 (1,000 Tons)

PSD Table						
Country:	Colombia					
Commodity:	By-Products,Tallow & Grease					
	1998		1999		2000	
	Old	New	Old	New	Old	New
Calendar Year Begin	01/1998		01/1999		01/2000	
Beginning Stocks	20	20	16	31	12	26
Production	30	30	30	30	0	30
Intra EC Imports	0	0	0	0	0	0
Other Imports	30	61	30	45	0	50
TOTAL Imports	30	61	30	45	0	50
TOTAL SUPPLY	80	111	76	106	12	106
Intra EC Exports	0	0	0	0	0	0
Other Exports	0	0	0	0	0	0
TOTAL Exports	0	0	0	0	0	0
Domestic Consumption	64	80	64	80	0	82
Ending Stocks	16	31	12	26	12	24
TOTAL DISTRIBUTION	80	111	76	106	12	106
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Source: DANE (National Statistics Bureau).

Colombia: Tallow Imports, 1998 (Tons)

Import Trade Matrix			
Country:		Units:	Tons
Commodity:			
Time period:	1998		
Imports for	1998		1999
U.S.	56734	U.S.	
Others		Others	
United Kingdom	3001		
Canada	1198		
Venezuela	327		
Total for Others	4526		0
Others not listed			
Grand Total	61260		0

Source: DANE (National Statistics Bureau).