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**GAIN Report Number:**

## **Colombia**

### **Food Service - Hotel Restaurant Institutional**

#### **Hotel Restaurant Institutional (HRI) Annual 2015**

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**Report Highlights:**

The Colombian HRI sector is expected to grow 4.8 percent in 2015. Hotel occupancy rates have a stable behavior, reaching 52.8 percent in 2014, with a number of new hotel chains expanding operations in Colombia. The average Colombian consumer spends about \$20 when eating out and increasing per capita expenditures for restaurants has paralleled per capita income growth, supporting high-end restaurant performance in 2014.

## **SECTION I: MARKET SUMMARY**

### **Market Narrative**

Colombia is the largest consumer of U.S. agricultural products in South America, followed by Peru and Venezuela. In fiscal year (FY) 2015, U.S. agricultural exports to Colombia were valued at \$2.6 billion. Trade in U.S. agricultural products to Colombia has expanded as a result of the U.S.-Colombia Trade Promotion Agreement (CTPA), implemented in May 2012. Colombia is eager for access to other markets and has signed Free Trade Agreements (FTAs) with various countries and trade blocs, such as Canada, the South American Common Market (MERCOSUR) and the European Union. Colombia is awaiting final legislative and judicial approvals for FTAs with South Korea, Costa Rica, Israel, Panama and a larger trade bloc, the Pacific Alliance, which includes Chile, Peru and Mexico. Colombia is currently negotiating FTAs with Turkey and Japan.

With an average Gross Domestic Product growth at 4.7 percent over the last decade, and a rising GDP per capita, millions of Colombians have moved out of poverty and into the low and middle income classes. These income adjustments have resulted in more household disposable income and changes in eating patterns, such as shifting diets from vegetable to animal proteins -- poultry consumption has almost doubled in the last ten years. Increasing demand for consumer-ready products has stimulated growth in fast food chain restaurants to support urbanization and more dining outside the home. This has impacted the food industry sector dramatically with food manufacturers desperately seeking a variety of high quality raw materials to adapt to changing consumer tastes and preferences.

Colombia is a net importer of many food processing ingredients and trade opportunities abound. For example, there is a growing domestic demand for higher quality confectionary products and ingredients are needed to complement a large cocoa producing industry to develop better quality chocolates and other candies. The production in chocolates is burdened by very volatile domestic prices of milk, cocoa and sugar, which have risen in recent years. In general, Colombia imports about 15 percent of glucose consumption.

According to surveys from a local food service organization, fresh, premium meat cuts represent 48 percent of HRI purchases, followed by non-alcoholic drinks (17%), fruits and pulses (15%), other foods and beverages (16%) and other inputs (4%). The Colombian Department of National Statistics Department (DANE) estimates that the HRI sector is highly informal, with 98 percent of establishments not being officially registered with national or local governments and only 2 percent complying with commercial food regulations.

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

The Colombia Restaurant Association (ACODRES) estimates that there are 65 thousand restaurants throughout the country. Colombia is undergoing a gastronomy revival to attract tourists, resulting in a significant increase in high-end restaurant establishments in all major cities. The gastronomy revival supports more sophistication in restaurant opportunities, especially in the large cities, where the quality and service are comparable to high-end restaurants in other parts of the world. In addition, the fast food sector has grown rapidly, providing an excellent alternative to higher-end restaurants in times of economic recession. Colombians are becoming more inclined to eat in fast food restaurants due to dual income, working families who look for convenience and affordability in their dining out options.

According to Euromonitor, food service sales in Colombia increased 6 percent in 2013. The sector's transactions grew by 4 percent in the same period. The most dynamic sectors have been specialty coffee shops, high-end bakeries, fast food establishments and food for home delivery.

Experts in the Colombian restaurant sector claim that Colombian consumers have changed tastes and preferences in the last ten years, seeking out different kinds of menus and products offered, as well as becoming more demanding in food quality and product innovation. Survey results show that restaurants offering high quality meals, while charging minimal prices, are the preferred choice of Colombian consumers. Although chain restaurants are growing exponentially, strong competition from local, more informal restaurants remains. High-end restaurant sales will continue grow as long as income distribution improves and the middle class continues to expand. The high-end restaurant market has opportunities in Bogota, Cali, Medellin and Cartagena. The growth in restaurant chains has demonstrated that the franchising model, distributing costs with more points of sale and uniform prices and quality, has shown the most opportunity for restaurant industry investment.

The restaurant and food service sector is expected to expand as a consequence of growing incomes, higher participation of women in the labor force and more demands on a household's time, resulting in a stronger incentive to dine out of home or demand home delivery food services. Restaurant chains are expected to perform better than independent, local restaurants.

## **Hotel Industry**

The DANE reports that hotel occupancy rates in 2014 were 52.8 percent, slightly bigger compared to 2013. Increasing informality in the sector is considered the principal threat to the industry by the Colombian Hotel Association (COTELCO). This growing, informal hotel sector is typically not officially registered with the Government of Colombia (GOC) and does not pay taxes. The hotel sector generates approximately 74 jobs per 100 rooms, according to COTELCO.

The GOC has supported the construction of new hotels in Colombia by providing encouraging property and business tax incentives; therefore, the Colombian hotel industry has expanded in recent years. Demand for luxury lodging is increasing and it is common to find high-end hotels not only in main cities, but also in smaller ones like Pereira or Yopal. Growing room supply in Colombia and local currency depreciation have resulted in a slightly decrease in lodging rates, from \$132 in 2013 to \$124 in 2014.

## Advantages and Challenges for U.S. Exporters

Advantages	Challenges
The U.S.-Colombia CTPA expands opportunities and market potential for many agricultural products.	Colombia has trade agreements with many other countries increasing competition with U.S. products.
U.S. agricultural products have a reputation for high quality.	Colombian per capita consumption for processed and semi-processed products is low, such as bread, compared to other Latin American markets.
Colombia is the second largest agricultural trade destination for U.S. food product in South America.	U.S. products will have to maintain the reputation of higher quality in order to be competitive with local food processing companies, guaranteeing a consistent and uniform supply of products year round.
The growth of tourism and the hotel and restaurant sectors will require a greater array of raw materials and ingredients to make final products more appealing to foreigners and fast changing domestic consumer tastes and preferences.	There is a cultural misperception that frozen products are unhealthy and lack quality.
The growing lower and middle income population, specifically the youth and working women of Colombia, are stimulating new food consumer trends and a growth in processed foods.	Internal transportation costs from ports of entry are costly due extremely poor infrastructure.
Market opportunities for health foods and organic products are expanding given growing obesity trends and GOC support for healthy living campaigns.	Cold chain is deficient and Colombians have no clear understanding of this need to maintain product quality.

## SECTION II: MARKET ENTRY

### Entry Strategy

It will be critical for U.S. exporters entering the Colombian market to best understand the customer's needs and how to meet their purchasing requirements and specifications, in addition to all standards and regulatory expectations of the Government of Colombia to avoid issues at ports of entry. Critical considerations for market entry include the following:

- Competition is based on quality, price and service;
- Innovative marketing strategies are imperative in order to penetrate the market;
- Social marketing techniques continue to be very strong, using sales to generate funding for social programs;
- U.S. suppliers should develop ways to meet the needs of the Colombian market through personal

- visits to better understand the market and identify needs of buyers and consumer trends;
- Use consolidation when exporting small amounts of product;
- Establish direct contact with hotel and restaurant chains;
- Develop business relationships with top executives like marketing directors, purchasing managers, and expose them to U.S. business practices;
- Participate in local trade and promotion shows, such as Alimentec, Agroexpo, Expovinos, Agrofuturo, and also be part of trade delegations;
- Many Colombian companies' representatives visit trade shows in the United States, such as the American Food and Beverage Trade Show and the Fancy Food Winter/Summer Shows, which are great opportunities to meet and educate Colombian importers;
- Develop, to the extent possible, Spanish marketing/communication materials;
- Work closely with local importers to comply with food import regulations to facilitate the registration and import of food products and minimize port of entry risks;
- Support the importer with promotional campaigns.

## **Market Structure**

In recent years, the Colombian food industry has undergone unprecedented consolidation and structural change through mergers, acquisitions, divestitures and new foreign competitors entering the market. This widespread consolidation in the retail, Hotel-Restaurant-Institutional (HRI) and food processing industry was driven by expected efficiency gains from economies of scale, resulting in significant impacts on market share and food prices. As well, internet e-commerce sales are becoming more popular and direct marketing through credit card promotions, flyers, polls, and sales calls to either home or office sites including home delivery service, are also growing popularity. It is also important to note that distribution channels have become more efficient with the increased presence of foreign competitors.

## **Sector Profiles**

### **HOTELS**

COTELCO was created by the GOC over 50 years ago. The organization provides support to its members and represents the hotel investors' interests to the government. COTELCO, in conjunction with the Ministry of Commerce, Industry and Tourism (MOCIT) established regulations that categorize hotels by stars (from one to five stars). The hotel categorization is done in compliance with international standards that guarantee visitors the uniform services according to the category of the hotel. In addition, a MOCIT sponsored Decree offered tax relief for hotels built or remodeled between January 1, 2003 and December 31, 2017. The tax relief is granted for 30 years beginning January 2003. This law has provided incentives for investment in the hotel sector, resulting in the exceptional growth and increase of international hotel chains in Colombia. As well, many local chains have remodeled hotels to not only take advantage of the tax relief incentives, but also to obtain a better star category classification in anticipation of the influx of tourism.

### **Colombia Hotel Occupancy Rates**

2010	2011	2012	2013	2014
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50.4	52.0	53.8	52.7	52.8
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Source: DANE

Hotel occupancy rates have remained stable since 2007, despite a slight drop during the 2009 global economic downturn. The hotel sector is concentrating on tourism and business niche markets, such as business conventions, annual meetings, social functions and medical tourism. The table below demonstrates the travel motivations for foreigners and Colombians within Colombia.

#### Travel motivations - 2014

	Leisure	Business	Education / Convention	Other
Colombians	46.6%	42.3%	7.7%	3.5%
Non Colombians	69.5%	20.6%	2.0%	7.9%

Source: MOCIT

Foreign visitors are mainly from the United States (19%) followed by European Union (16%), Venezuela (14%), Andean Community (13%), Mercosur (13%), Mexico (6%), Chile (5%), Canada (2%) and other countries (12%).

#### Colombian Hotel Chains

Company Name	Number of Hotels	Location
Hotel Decameron	17	Baru, Bogotá, Cartagena, Coffee región, Isla Palma, Leticia, Providencia, San Andres, Santa Marta, Tota
Grupo GHL	18	Barranquilla, Bogota, Cali, Cartagena, Girardot, Medellín, Pereira, San Andrés, Santa Marta, Villavicencio
Hotel Estelar	25	Barranquilla, Bogotá, Bucaramanga, Cali, Cartagena, Ibagué, Manizales, Medellín, Paipa, Santa Marta, Villavicencio, Yopal
Hotel Dann	8	Bogotá, Bucaramanga, Cartagena, Ibagué, Popayán
Hotel Royal	15	Barranquilla, Bogotá, Cali, Cartagena, Medellín
Organización German Morales e Hijos	10	Bogotá, Medellín
Hotel Charleston	3	Bogotá, Cartagena
Movich Hotels	8	Barranquilla, Bogotá, Cali, Cartagena, Medellín, Pereira

Source: Various online resources

#### International Hotel Chains in Colombia

Company Name	Number of Hotels	Location
Accor-Sofitel, Mercure, Ibis	5	Bogota, Cartagena, Medellin
Intercontinental Hotels Group	14	Bogota, Bucaramanga, Cali, Cartagena, Cúcuta, Medellín, Yopal

Hilton International	12	Barranquilla, Bogota, Cali, Cartagena, Valledupar, Yopal
Starwood Hotels	8	Barranquilla, Bogotá, Cali, Cartagena, Medellin
Marriott	5	Bogota, Cali
Wyndham	11	Barranquilla, Bogota, Bucaramanga, Cucuta, Medellin, Villavicencio
NH Hoteles	11	Barranquilla, Bogota, Cali, Cartagena, Medellin
Melía	1	Medellin
Hyatt	1	Cartagena

Source: Various online resources

## RESTAURANTS

ACODRES represents the interests of the restaurant sector, organizing trade shows and seminars throughout the country to benefit restaurant service, menu designs, restaurant management, etc. ACODRES and MOCIT coordinate on regulations and standards to categorize restaurants based on quality and cleanliness.

Restaurant sector sales in Colombia have grown 152 percent in the last decade, according to ACODRES. It is estimated that Colombia has 65,000 restaurant establishments. The growth in the restaurant sector is primarily due to increases in tourism. Principal tourist cities are Cartagena, Medellin, Cali and Bogotá. It is important to mention that dining out is an increasing trend for Colombians.

Quick service and fast food restaurants represent one third of the market and are very popular in large cities. Quick service and fast food outlets are strategically located around working areas, food courts in shopping malls and on the side of main roadways. The convenience of fast food restaurants has supported dual income, working households with little time to prepare traditional meals on a moderate income. Competition among fast food chains is intense. For example, there are four fast food hamburger chains, both domestic and international, competing throughout Colombia: McDonald's, Presto, El Corral and Burger King. A tactic of the fast food chains is to advertise and conduct promotional campaigns directly for children in order to attract families, whether it is for hamburgers, pizza or fried chicken.

### Fast Food and Quick Service Chains in Colombia – 2014

Establishment Name	Global Brand Owner	Outlets	Market Share (%)	
			2013	2014
Subway	Doctor's Associates Inc	254	4.2	6.4
Helados Mimo's	Productora y Comercializadora de Alimentos Ltda	225	4.2	4.0

El Corral	IRCC Industria de Restaurantes Casuales Ltda	203	9.2	9.0
Juan Valdez	Fedecafe Federacion Nacional de Cafeteros de Colombia	200	3.8	3.9
Frisby	Frisby SA	196	7.0	6.4
Dunkin' Donuts	Dunkin' Brands Group Inc	173	2.5	2.4
Oma	Restcafe SAS	165	2.8	2.8
Helados Popsy	Inversiones El Cerrito Ltda	144	1.7	1.6
Presto	Frayco SA	140	2.7	2.7
Sandwich Qbano	Sandwich Qbano SA	139	3.7	3.6
Kokoriko	Avesco SA	130	7.2	7.0
Cosechas Express	Cosechas	124		
Jeno's Pizza	Telepizza SAU	116	2.1	1.9
McDonald's	McDonald's Corp	84	7.3	6.9
Crepes & Waffles	Crepes & Waffles SA	82	8.5	7.9
On the Run	Exxon Mobil Corp	56		
La Brasa Roja	CBC Ltda	54	1.5	1.4
Yogen Fruz	Yogen Fruz Canada Inc	54		
Pan Pa' Ya	Pan Pa' Ya Ltda	51	2.3	2.5
Domino's Pizza	Domino's Pizza Inc	50	1.3	1.5
PPC	PPC SA	50	0.6	0.6
Don Jediondo	Don Jediondo Sopitas y Parrillas SAS	47	1.2	1.1
Sr Wok	Díaz y Restrepo SAS	46	0.9	0.9
Burger King	Burger King Worldwide Inc	39	2.2	2.2
KFC	Yum! Brands Inc	38	1.0	1.5
Archies Pizza	Archies Colombia SA	37	2.4	2.4
Star Mart	Chevron Corp	35		
Piko Riko	Alimentos Rapidos Piko Riko Ltda	32	1.1	1.1
McCafe	McDonald's Corp	32	0.9	0.9
Pizza Pizza	Pizza Pizza Ltd	32	1.8	1.5
Others		747	15.9	15.9
Total		3,775	100,0	100,0

Source: Euromonitor

## INSTITUTIONAL

Procurement laws regulate purchases and contracts by government industrial and commercial enterprises. Even when equal contracting conditions apply, goods and services of domestic origin are given preferences. The following areas are important for the institutional sector.

**Schools:** According to the DANE, the 2015 Colombian population is 48 million with almost 27 percent within the age range of 5 to 19 or the ages of likely attendance in school. It is estimated that five

million are enrolled in private schools. Most private schools serve lunch, which is often mandatory at the elementary and middle school levels and optional for high schools. The average price a school lunch is \$3. Some schools contract the service from catering companies, but most schools have kitchens and prepare food on site. Food stuffs prepared at schools are purchased wholesale at establishments specialized in food services for schools. Snack food and beverage vending machines are in most schools for purchase. Sales of imported products in this sector are not significant; however, there is potential for growth in U.S. consumer-oriented-products, such as beverages and nutritional snacks.

**Colombian Government Programs:** The GOC sponsors several programs aimed at improving nutritional standards for children attending public schools to address child malnutrition in low-income families. The food assistance programs provide a nutritionally balanced lunch supplement and reach approximately four million school age children. Nursing mothers, the elderly and homeless are also included in these programs. The Colombian Family Welfare Institute (ICBF) and all regional educational offices implement the food assistance programs.

**Social and Country Clubs:** There are more than one hundred urban, semi-urban and suburban social clubs in Colombia, offering sports facilities, such as tennis and golf, and restaurant opportunities, including banquet halls for weddings and other social gatherings. Due to the economic downturn in recent years, several mergers and acquisitions took place among various social clubs. Some clubs were bought by corporate businesses. Clubs continue to recover from low sales and declining memberships and have adopted strategies in order to increase sales, like offering services to non-members for social events. Social clubs are the second best market for upscale imported food products. The clubs source food and beverage needs from specialized food service establishments and importers of fine foods and wines.

#### **Common Imported Products by Social Clubs**

<b>Seafood</b>	<b>Meats &amp; Poultry</b>	<b>Consumer-Oriented/Dairy</b>	<b>Fruits/Nuts/Vegetables</b>
salmon	sausages	frozen bakery products	pistachios
whitefish	ham	confectionary products	almonds, other nuts
caviar	turkey	spices	specialty rice
anchovies	premium beef cuts	salad dressings	frozen vegetables
		olive oils	frozen fruits
		cured cheeses	fresh fruits
		pastas	

### **SECTION III: COMPETITION**

#### **Competition Narrative**

The CTPA entered into force in May 2012. This comprehensive trade agreement eliminated tariffs and other barriers to goods and services. Although over 80 percent of U.S. exports of consumer and industrial products to Colombia have become duty-free, the CTPA provided a duty free tariff-rate-quota (TRQ) on certain goods that operate under a first come/first serve basis, except for rice and poultry which are subject to auctions manage by Export Trading Companies. There are significant opportunities for imported, value-added food products and raw materials in Colombia due to shifting

consumer preferences. United States competitors for raw materials for processing and value-added products are MERCOSUR, Canada and the European Union and all three have free trade agreements with Colombia. Colombia is awaiting final legislative and judicial approvals for FTAs with South Korea, Costa Rica, Israel, Panama and a larger trade bloc, the Pacific Alliance, which includes Chile, Peru and Mexico. Colombia is currently negotiating FTAs with Turkey and Japan.

#### **FY2015 Colombian Food Product Rankings by Country of Import**

Product Category Harmonized System Code	Rank	Country	Import Value (million dollars)
<b>Meat And Meat Offal</b> HS 02		<b>Total</b>	<b>199</b>
	1	United States	155
	2	Canada	18
	3	Chile	17
	4	Peru	5
	5	Argentina	1
		Other countries	3
<b>Dairy Products</b> HS 04		<b>Total</b>	<b>126</b>
	1	United States	53
	2	Argentina	18
	3	Chile	17
	4	Uruguay	6
	5	Spain	7
		Other countries	25
<b>Edible Vegetables, Certain Roots And Tubers</b> HS 07		<b>Total</b>	<b>171</b>
	1	Canada	73
	2	China	27
	3	Ecuador	9
	4	United States	21
	5	Peru	16
		Other countries	25
<b>Edible Fruit And Nuts</b> HS 08		<b>Total</b>	<b>252</b>
	1	Chile	144
	2	United States	56
	3	Peru	18
	4	Italy	5
	5	Spain	7
		Other countries	22
<b>Coffee, Tea, Mate And Spices</b> HS 09		<b>Total</b>	<b>36</b>
	1	Peru	11
	2	Ecuador	7
	3	Sri Lanka	6
	4	United States	2

	5	Brazil	1
		Other countries	9
<b>Milling, Malt And Starches</b> HS 11	1	<b>Total</b>	<b>22</b>
	2	United States	5
	3	Chile	3
	4	Brazil	1
	5	China	1
		France	1
		Other countries	11
<b>Edible Preparations Of Meat, Fish, Crustaceans, Mollusks</b> HS 16	1	<b>Total</b>	<b>259</b>
	2	Ecuador	113
	3	Duty Free (Cartagena)	73
	4	United States	35
	5	Chile	19
		Peru	8
		Other countries	11
<b>Sugars And Sugar Confectionary</b> HS 17	1	<b>Total</b>	<b>87</b>
	2	Peru	26
	3	United States	15
	4	Brazil	10
	5	Mexico	8
		China	9
		Other countries	19
<b>Cocoa And Cocoa Preparations</b> HS 18	1	<b>Total</b>	<b>77</b>
	2	Ecuador	26
	3	United States	18
	4	Brazil	6
	5	Italy	5
		Peru	3
		Other countries	19
<b>Preparations Of Cereals, Flour, Starch Or Milk; Bakers' Wares</b> HS 19	1	<b>Total</b>	<b>218</b>
	2	Mexico	38
	3	Chile	39
	4	United States	42
	5	Peru	27
		Spain	12
		Other countries	60
<b>Preparations Of Vegetables, Fruit, Nuts</b> HS 20	1	<b>Total</b>	<b>152</b>
	2	United States	64
	3	Chile	22
		Mexico	9

	4	Belgium	10
	5	Netherlands	7
		Other countries	40
<b>Miscellaneous Edible Preparations</b> HS 21		<b>Total</b>	<b>336</b>
	1	United States	118
	2	Brazil	63
	3	Chile	33
	4	Mexico	26
	5	China	11
		Other countries	85
<b>Beverages, Spirits And Vinegar</b> HS 22		<b>Total</b>	<b>327</b>
	1	United Kingdom	39
	2	United States	33
	3	Bolivia	27
	4	Chile	26
	5	Ecuador	23
		Other countries	179
<b>Albuminoidal Substances; Modified Starches; Glues; Enzymes</b> HS 35		<b>Total</b>	<b>130</b>
	1	United States	34
	2	Brazil	21
	3	Mexico	13
	4	Denmark	11
	5	China	8
		Other countries	43

Source: Global Trade Atlas

## SECTION IV: BEST PRODUCT PROSPECTS

### U.S. Agricultural Product Market Potential

Consistent 4.7 percent GDP growth and a rising per capita income have led to increased demand for fast food restaurants and ready-to-eat food products. Colombia is already an important market for America's farmers and ranchers. In FY2015, the United States exported \$2.6 billion of agricultural products to Colombia. Top U.S. agricultural exports were corn, soybean meal, soybeans, wheat and pork and pork products.

Colombia is a fast growing market for value-added food products. Surveyed retailers and food importers feel there is significant potential for new products in all food categories. Healthy and ethnic food categories are especially new and fast growing. Wines and gourmet products are penetrating the market with excellent results. Organic food products are a new trend and retailers are searching for the best suppliers.

The following products categories represent the major export opportunities and some emerging opportunities for U.S. food products to Colombia with zero duties or reduced duties:

Bulk Commodities	Intermediate Products	Consumer-Oriented
Corn (up to quota)	Soybean meal	Uncooked pasta
Rice (up to quota)	Vegetable oils	Chilled pork
Soybeans	Potato flakes	Processed turkey
Lentils	Yeasts	Yogurt (up to quota)
Peanuts	Sugars and sweeteners	Fresh fruits
Dried beans (up to quota)		Processed vegetables
		Processed fruits
		Soya sauce
		Tree nuts
		Sugar confectionery
		Cookies
		Chewing gum
		Black tea
		Spices
		Fresh vegetables
		Wine
		Healthy food products

Below is the CTPA TRQ schedule according to agricultural product or bulk commodity:

Product	Base Duty	TRQ (MT) 2016	TRQ Annual Increase	Phase Out Period	Safeguard Trigger Level
Yellow Corn	25%	2,552,563	5.0%	12 years	
White Corn	20%	165,917	5.0%	12 years	
Rice	80%	94,209	4.5%	19 years (6 of grace)	120% of TRQ
Sorghum	25%	25,526	5.0%	12 years	
Dried Beans	40.2%	19,144	5.0%	10 years	130% of TRQ
Animal Feeds	10%-25%	236,112	5.0%	12 years	
Pet Food	28%	11,755	8.0%	8 years	
Chicken Leg Quarters	70%	31,633	4.0%	18 years (10 of grace)	130% of TRQ
Poultry Parts	164.4%			18 years (5 of grace)	
Spent Fowl	20%	464	3.0%	18 years	130% of TRQ
Standard Quality Beef	51.2%	2,553	5.0%	10 years	140% of TRQ
Variety Meats	51.2%	5,751	5.5%	10 years	
Pork Meat	30%	Unlimited		5 years	
Crude Soybean	24%	36,500	4.0%	10 years	

Oil					
Glucose	28%	12,763	5.0%	10 years	
Milk Powder	33%	8,053	10.0%	15 years	
Cheese	20% - 33%	3,382	10.0%	15 years	
Yogurt	20%	161	10.0%	15 years	
Butter	33%	805	10.0%	11 years	
Processed Dairy Products	20%	1,611	10.0%	15 years	
Ice Cream	20%	483	10.0%	11 years	
Maple Syrup	5%	Unlimited		5 years	

For further information please check the following link:

<http://www.ustr.gov/trade-agreements/free-trade-agreements/colombia-fta/final-text>

RICE: <http://www.col-rice.org/>

POULTRY: <http://www.colom-peq.org/>

## **SECTION V: POST CONTACT AND FURTHER INFORMATION**

### **RELATED REPORTS**

Check following link:

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

### **POST CONTACT INFORMATION**

Office of Agricultural Affairs  
U.S. Embassy, Bogotá, Colombia  
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Bogotá, Colombia

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Fax: (57-1) 275-4525

e-mail : [AgBogota@fas.usda.gov](mailto:AgBogota@fas.usda.gov)

USDA Animal Plant Health Inspection Service (APHIS)

U.S. Embassy, Bogotá, Colombia

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Food Product Registration and Health Permits:

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