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Colombia

Food Service - Hotel Restaurant Institutional

2014 Annual Report

Approved By:

Michael Conlon,
Agricultural Counselor

Prepared By:

Anthony J. Gilbert, Agricultural Attaché
Ana Maria Salinas, Agricultural Marketing Specialist

Report Highlights:

The Colombian HRI sector is expected to grow four percent in 2014. Hotel occupancy rates are generally stable, at around 53 percent in 2013, with a number of new hotel chains expanding operations in Colombia. In addition, because of the growing economy, Colombian consumers are eating out more, which has created a boom for restaurant sales in the country.

SECTION I: MARKET SUMMARY

Market Narrative

Colombia is the largest consumer of U.S. agricultural products in South America, followed by Brazil and Venezuela. In fiscal year (FY) 2014, U.S. agricultural exports to Colombia were valued at \$2.3 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 and Panama. Colombia is currently negotiating FTAs with Turkey, Japan and a larger trade bloc, the Pacific Alliance, which includes Chile, Peru and Mexico.

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. 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%).

Restaurants and Food Service Sector

The Colombia Restaurant Association (ACODRES) estimates that there are 65,000 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 eight percent in 2013. 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 over the last dozen years, seeking out different kinds of menus and products offered, as well as becoming more demanding in food quality and product innovation. Industry 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 Colombian Department of Statistics (DANE) reports that hotel occupancy rates in 2013 were 53 percent, slightly lower compared to 2012. The hotel sector generates approximately 74 jobs per 100 rooms, according to the Colombian Hotel Industry Association (COTELCO). One threat to the formal hotel industry is the growth of the informal hotel sector, such as apartments, family homes, and rural farms, or haciendas, which offer bed and breakfast style accommodations. The informal hotel sector is typically not officially registered with the Government of Colombia (GOC) and does not pay taxes.

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 has resulted in a slightly decrease in lodging rates, from \$138 in 2012 to \$132 in 2013.

Advantages and Challenges for U.S. Exporters

Advantages	Challenges
The CTPA expands opportunities and market potential for many agricultural products.	Colombia has trade agreements with many other countries increasing competition for U.S. products.
U.S. agricultural products have a reputation for being 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	Internal transportation costs from ports of entry are costly due extremely poor

Colombia, are stimulating new food consumer trends and a growth in processed foods.	infrastructure.
Market opportunities for healthy 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

Market 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 (GOC) 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, HRI and food processing industries 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. A survey by the private sector advocacy organization, Colombian Industry Association (ANDI), found that the principal threats to the Colombian food industry are contraband products crossing the eastern and southern borders.

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
50.4	52.0	53.8	52.7

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 - 2013

	Business	Leisure	Convention	Health	Other
Colombians	43	45	8	1	1
Non Colombians	58	28	6	3	2
Total	48	40	7	2	1

Source: DANE

Foreign visitors are mainly from the United States (21%) followed by Venezuela (14%), Ecuador (6%), Brazil (6%), Argentina (5%), Spain (5%), Mexico (5%), Peru (5%) and other countries (33%).

Colombian Hotel Chains

Company Name	Number of Hotels	Location
Hotel Decameron	14	Leticia, Baru, Cartagena, Armenia, Isla Palma, Tota, Providencia, San Andres, Santa Marta
GHL Hotels Limited	27	Barranquilla, Bogota, Cali, Cartagena, Girardot, Medellin, Neiva, Pereira, San Andres, Santa Marta, Valledupar, Villavicencio, Yopal
Hotel Estelar	25	Barranquilla, Bogota, 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	6	Bogotá, Medellín
Hotel Charleston	3	Bogotá, Cartagena

Source: MOCIT

International Hotel Chains in Colombia

Company Name	Number of Hotels	Location
Accor-Sofitel, Mercure, Ibis	4	Bogota, Cartagena, Medellin
Intercontinental Hotel Group	8	Bogota, Bucaramanga, Cali, Cartagena, Cúcuta, Medellin, Yopal
Hilton International	3	Bogota, Cartagena
Starwood Hotels	5	Barranquilla, Bogotá, Cali, Medellin
Marriott	4	Bogota, Cali
Wyndham	9	Barranquilla, Bogota, Bucaramanga, Medellin, Villavicencio
NH Hoteles	1	Bogota
Melía	4	Bogota, Bucaramanga, Medellin

Source: MOCIT

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 the 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 the 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 - 2013

Establishment Name	Global Brand Owner	Outlets	Market Share (%)	
			2010	2011
Helados Mimo's	Productora y Comercializadora de Alimentos Ltda	250	4.5	4.1
Oma	Restcafe SAS	200	3.0	2.7
Frisby	Frisby SA	186	6.9	6.5
El Corral	IRCC Industria de Restaurantes Casuales Ltda	185	10.5	9.8
Juan Valdez	Fedecafe Federacion Nacional de Cafeteros de Colombia	181	4.1	4.1
Subway	Doctor's Associates Inc	158	1.9	2.4
Dunkin' Donuts	Dunkin' Brands Group Inc	157	2.9	2.8
Helados Popsy	Inversiones El Cerrito Ltda	150	2.0	1.9
Kokoriko	Avesco SA	130	7.9	7.1
Presto	Frayco SA	130	2.9	2.8
Sandwich Qbano	Sandwich Qbano SA	125	3.8	3.9
Jeno's Pizza	Telepizza SAU	120	2.6	2.6
McDonald's	McDonald's Corp	88	8.8	8.4
Crepes & Waffles	Crepes & Waffles SA	72	10.7	9.7
La Brasa Roja	CBC Ltda	54	3.9	3.6
Yogen Fruz	Yogen Fruz Canada Inc	50	0.6	0.6
Don Jediondo	Don Jediondo Sopitas y Parrillas SAS	42	1.3	1.4
Sr Wok	Díaz y Restrepo SAS	41		2.3
Pan Pa' Ya	Pan Pa' Ya Ltda	39	2.7	2.4
Archies Pizza	Archies Colombia SA	37	2.5	2.4
Burger King	Burger King Worldwide Inc	36	2.1	2.4
Pizza Pizza	Pizza Pizza Ltd	36	2.3	1.9
Domino's Pizza	Domino's Pizza Inc	35	1.1	1.1
KFC	Yum! Brands Inc	28	1.3	1.6
Others		716	9.7	11.5
Total		3246	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 2013 Colombian population is 47 million with almost 30 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. The annual ICBF budget for food assistance is an estimated \$430 million.

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

Seafood	Meats & Poultry	Consumer-Oriented / Dairy	Fruits / Nuts / Vegetables
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 managed by export trading companies. There are significant opportunities for imported, value-added food products and raw materials in Colombia due to shifting consumer preferences. U.S. 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 and Panama. Colombia is currently negotiating FTAs with Turkey, Japan and a larger trade bloc, the Pacific Alliance, which includes Chile, Peru and Mexico.

FY2014 Colombian Food Product Rankings by Country of Import

Product Category Harmonized System Code	Rank	Country	Import Value (million dollars)
Meat And Meat Offal HS 02		Total	234
	1	United States	176
	2	Canada	26
	3	Chile	24
	4	Peru	5
	5	Argentina	1
		Other countries	2
Dairy Products HS 04		Total	81
	1	United States	38
	2	Chile	11
	3	Uruguay	8
	4	Argentina	5
	5	Ecuador	4
		Other countries	15
Edible Vegetables, Certain Roots And Tubers HS 07		Total	137
	1	Canada	56
	2	China	24
	3	Peru	15
	4	United States	15
	5	Mexico	9
		Other countries	18
Edible Fruit And Nuts HS 08		Total	279
	1	Chile	177

	2	United States	55
	3	Peru	15
	4	Spain	7
	5	Ecuador	6
		Other countries	19
Coffee, Tea, Mate And Spices HS 09	1	Total	57
	2	Peru	19
	3	Ecuador	11
	4	Brazil	8
	5	Sri Lanka	7
		India	4
		Other countries	8
Milling, Malt And Starches HS 11	1	Total	26
	2	Chile	6
	3	United States	5
	4	Thailand	2
	5	Netherlands	2
		Brazil	1
		Other countries	10
Edible Preparations Of Meat, Fish, Crustaceans, Mollusks HS 16	1	Total	262
	2	Ecuador	112
	3	Duty Free (Cartagena)	83
	4	United States	31
	5	Chile	14
		Peru	12
		Other countries	10
Sugars And Sugar Confectionary HS 17	1	Total	129
	2	Bolivia	32
	3	Peru	27
	4	Brazil	15
	5	United States	15
		China	9
		Other countries	31
Cocoa And Cocoa Preparations HS 18	1	Total	77
	2	Ecuador	22
	3	United States	18
	4	Brazil	7
	5	Mexico	4
		Italy	4
		Other countries	22
Preparations Of Cereals, Flour, Starch Or Milk; Bakers' Wares		Total	208

HS 19	1	Mexico	45
	2	Chile	43
	3	United States	26
	4	Peru	23
	5	Spain	7
		Other countries	64
Preparations Of Vegetables, Fruit, Nuts		Total	137
HS 20	1	United States	55
	2	Chile	23
	3	Mexico	9
	4	Netherlands	6
	5	Argentina	6
		Other countries	38
Miscellaneous Edible Preparations		Total	303
HS 21	1	United States	124
	2	Brazil	58
	3	Mexico	21
	4	Chile	16
	5	Peru	10
		Other countries	74
Beverages, Spirits And Vinegar		Total	280
HS 22	1	United Kingdom	54
	2	United States	36
	3	Chile	23
	4	Mexico	22
	5	Ecuador	22
		Other countries	123
Albuminoidal Substances; Modified Starches; Glues; Enzymes		Total	138
HS 35	1	United States	32
	2	Brazil	30
	3	Mexico	15
	4	Denmark	10
	5	China	9
		Other countries	42

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 FY2014, the United States exported \$2.3 billion of agricultural products to Colombia. Top U.S. agricultural exports were corn, wheat, soybean meal and pork and pork products.

Colombia is a fast growing market for value-added food products. Industry 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:

Bulk Commodities	Intermediate Products	Consumer-Oriented
corn (up to quota)	soybean meal	chilled pork
wheat	soybean oil	pastry and dessert mixes
dried beans and lentils	distillers grains	condiments (except mayonnaise)
cotton	vegetable oils	frozen vegetables
soybeans	feeds and fodders	premium beef cuts
peanuts	wheat flour	processed turkey
		beer
		wine
		nuts
		soup preparations
		lamb
		fresh fruits
		healthy food products
		processed vegetables

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

Product	Base Duty	TRQ (MT) 2015	TRQ Annual Increase	Phase Out Period	Safeguard Trigger Level
Yellow Corn	25%	2,431,013	5.0%	12 years	
White Corn	20%	158,016	5.0%	12 years	
Rice	80%	90,152	4.5%	19 years (6 of grace)	120% of TRQ
Sorghum	25%	24,310	5.0%	12 years	
Dried Beans	40.2%	18,233	5.0%	10 years	130% of TRQ
Animal Feeds	10%-25%	224,869	5.0%	12 years	
Pet Food	28%	10,884	8.0%	8 years	

Chicken Leg Quarters	70%	30,416	4.0%	18 years (10 of grace)	130% of TRQ
Poultry Parts	164.4%			18 years (5 of grace)	
Spent Fowl	20%	450	3.0%	18 years	130% of TRQ
Standard Quality Meat	51.2%	2,431	5.0%	10 years	140% of TRQ
Variety Meats	51.2%	5,451	5.5%	10 years	
Pork Meat	30%	Unlimited		5 years	
Crude Soybean Oil	24%	35,096	4.0%	10 years	
Glucose	28%	12,155	5.0%	10 years	
Milk Powder	33%	7,321	10.0%	15 years	
Cheese	20%-33%	3,075	10.0%	15 years	
Yogurt	20%	146	10.0%	15 years	
Butter	33%	732	10.0%	11 years	
Processed Dairy Products	20%	1,464	10.0%	15 years	
Ice Cream	20%	439	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
Carrera 45 No. 24B-27
Bogotá, Colombia

Telephone: (57-1) 275-4622

Fax: (57-1) 275-4525

e-mail : AgBogota@fas.usda.gov

USDA Animal Plant Health Inspection Service (APHIS)
U.S. Embassy, Bogotá, Colombia
Phone: (57-1) 275-4572
Fax: (57-1)275-4571
e-mail: Roberto.Guzman@aphis.usda.gov

COLOMBIAN GOVERNMENT CONTACTS

Phytosanitary and Zoosanitary Requirements:

Ministry of Agriculture and Rural Development
Colombian Institute for Agriculture and Livestock (ICA)
Carrera 41 No. 17-81
Bogotá, Colombia

Juan Andres Angulo Mosquera
Deputy Manager Animal Health Protection
ICA -Instituto Colombiano Agropecuario
Carrera 41 No. 17-81
Bogotá, Colombia
Tel. (57-1) 332-3736 ext. 1201
e-mail: subgerencia.pecuaria@ica.gov.co

Carlos Alberto Soto
Deputy Manager Plant Health Protection
ICA -Instituto Colombiano Agropecuario
Carrera 41 No. 17-81
Bogotá, Colombia
Tel: (57-1) 332-3754 ext.1301
E-mail: subgerencia.agricola@ica.gov.co

Food Product Registration and Health Permits:

Ministry of Health and Social Protection
National Institute for the Surveillance of Food and Medicine (INVIMA)
Division of Food and Alcoholic Beverages
Harry Alberto Silva
Carrera 10 No 64 -28
Bogotá, Colombia
Phone: (57-1) 294-8700 Ext. 3920
E-mail: invimasal@invima.gov.co

Office of International Affairs

María Angélica Sánchez Herrera
Carrera 10 No 64 -28
Bogotá D.C. Colombia
Phone: (57-1) 294-8700 Ext. 3897

E-mail: msanchezh@invima.gov.co