

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY
USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT
POLICY

Required Report - public distribution

Date: 10/19/2018

GAIN Report Number: CO1820

Colombia

Food Service - Hotel Restaurant Institutional

Colombian Food Service Sector Offers Opportunities to U.S. Exporters

Approved By:

Michael Conlon, Agricultural Counselor

Prepared By:

Benjamin Rau, Agricultural Attaché

Ana Maria Salinas, Agricultural Marketing Specialist

Report Highlights:

Colombian Gross Domestic Product (GDP) grew at 1.8 percent in 2017, slower than previous year growth rates, but still higher than other Latin American economies. Colombians have changed eating patterns as a result of increased income. Hotel occupancy rates remain stable at 56.3 percent in 2017, with a number of new hotel chains expanding operations in Colombia. The average Colombian consumer spends about \$14 per month when eating out.

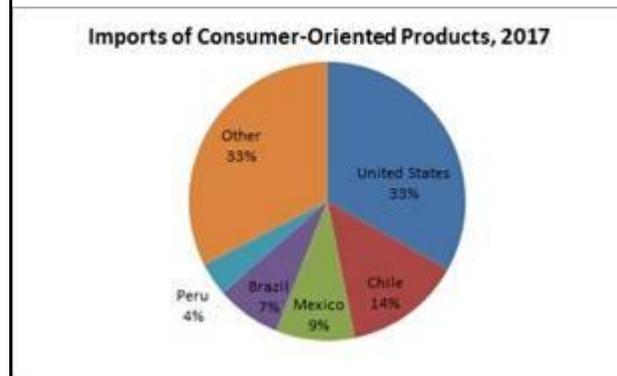
Post:
Bogota

Author Defined:

Market Fact Sheet: Colombia

Executive Summary: Colombia is the leading destination for U.S. agricultural exports in South America, followed by Peru and Chile. In 2017, U.S. agricultural exports to Colombia were valued at \$2.5 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.

Imports of Consumer-Oriented Products: Colombia’s total imports of consumer-oriented products grew three percent in 2017 to \$1.7 billion. U.S. consumer oriented product exports to Colombia were up 8.7 percent to \$572 million in 2017, followed by Chile (\$235 million) and Mexico (\$160 million). Consumer-oriented products account for upwards of 26% of the distribution of U.S. agricultural trade to Colombia.



Food Processing Industry: Colombia is a net importer of many food-processing ingredients and trade opportunities abound. There is a growing domestic demand for higher quality confectionary products and ingredients for the growing chocolate industry. Even though Colombia is a major producer and consumer of palm oil, the Colombian fats and oils sector must still import significant quantities of unrefined soybean oil, sunflower oil, and other oil seeds to meet industrial demand. The milling, bakery and starches sectors have benefited from innovation in packaging, flavors and healthier ingredients. Bread consumption has decreased due to low carbohydrate, “healthy eating” trends that have marginally changed food eating habits. The wheat milling and baking industry is rising to the challenge by conducting outreach campaigns to demonstrate that bread is a nutritional and healthy option for consumers.

Food Retail Industry: Western style, large supermarkets are part of a noteworthy retail transformation in the last decade with major, domestic and international grocery chains opening new stores, of varying sizes, at intense rates. Over the past seven years, the U.S. retail chain PriceSmart has developed a significant presence in Colombia, opening a total of seven stores in the country. Discount stores have increased market share and continue opening outlets throughout the country offering wide private label portfolios cheaper than grocery chains.

Quick Facts CY 2017

Imports of Consumer – Oriented Products (US billion):
\$1.7

List of Top 10 Fastest Growing Imported Ag Products in Colombia:

Description	2016 (Dollars)	2017 (Dollars)	2017/2016 Change (%)
Albumin and its derivatives	4,534	170,874	3,669
Dairy spreads	179	5,353	2,891
Meat of swine (fresh or chilled)	25,423	610,382	2,300
Fresh fruit, nesoi	41,237	791,429	1,819
Soybean seed	11,616	77,371	566
Fertilized eggs for incubation	22,315	129,280	479
Pulses flour and meal	1,980	9,797	394
Flours and meals of oil seeds, other than mustard or soybeans	10,411	49,328	373
Figs	21,703	95,035	337
Bran, sharps and other residues, derived from the sifting, milling or other working of cereals, excluding corn, rice and wheat	118,656	452,331	281

Top 5 Colombian Retailers

COMPANY	Number of Stores
Grupo Exito	566
Olímpica	350
Alkosto	14
Cencosud	110
D1	+800

GDP/Population

2018 Population (million): 49.83
2017 GDP (billion USD): 309.20
2017 GDP per capita (USD): 6,272.81

Data and Information Sources: Global Trade Atlas, Global Agricultural Trade System, DANE, IMF, various online sources

Contact: OAA Colombia agbogota@fas.usda.gov

SECTION I: MARKET SUMMARY

GDP grew at 1.8 percent in 2017, slower than previous year growth rates, but still higher than other Latin American economies. 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. For example, poultry consumption has almost doubled in the last ten years. Increasing demand for consumer-ready products has stimulated growth in fast food chain restaurants. 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.

Major Trends

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 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. It is also important to note that distribution channels have become more efficient with the increased presence of foreign competitors.

Bad dietary habits are a major issue for the country since they are associated with obesity and heart disease. Obesity affects over 50% of Colombian adult population. Although it is still low in children compared to other Latin American countries, the problem is growing, mainly among teenagers. Heart disease is the leading cause of death in the country. The Government of Colombia (GOC), specifically the Ministry of Health (MOH), has developed the National Strategy on the Reduction of Sodium Intake. In addition, some initiatives regarding advertising for food products for children are becoming popular. Food manufacturers have positively reacted by developing healthier products and promoting healthier lifestyles.

Sector Trends

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 (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.

The Colombia Restaurant Association (ACODRES) estimates that there are 65,000 restaurants throughout the country. The market share of the informal restaurant sector is 86%. 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 slow-down. 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.

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 to 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, Barranquilla 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. Colombians preferences on home delivery foods are roasted chicken, hamburgers and pizza. Restaurant chains are expected to perform better than independent, local restaurants.

Recent tax reform led to a VAT increase from 16% to 19% that increased prices and affected Colombian consumer

decisions. Consequently, consumption has been affected and households reduce luxury expenses while they adapt to the new VAT.

Information on Colombian food trends and retail sector is covered by the Food Processing Ingredients GAIN report is available at <https://gain.fas.usda.gov>

Advantages and Challenges for U.S. Exporters

Advantages	Challenges
The U.S.-Colombia Trade Promotion Agreement (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, for example bread at only 24kg/year, compared to other Latin American markets.
Colombia is the largest agricultural trade destination for U.S. food products in South America.	U.S. products will have to maintain their 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 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 to 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: ROAD MAP FOR MARKET ENTRY

Entry Strategy

It will be critical for U.S. exporters entering the Colombian market to understand the customers' needs and desired specifications. Additionally, it will be important to understand all Colombian standards and regulations to avoid issues at ports of entry. Critical considerations for market entry include the following:

- Competition is based on quality, price and service;
- Direct to consumers marketing strategies are imperative in order to penetrate the market, such as cooking demonstrations, and tastings, among others;
- Social responsibility marketing techniques continue to be very successful, 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 and Expovinos, and also be part of trade delegations;
- Many Colombian companies' representatives visit trade shows in the United States, such as the National Restaurant Association Show, 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.

Import regulations and labeling laws are covered in the Food and Agricultural Importer Regulations (FAIRS) GAIN Report, available at <https://gain.fas.usda.gov>. Additional information is available from the FAS Office of Agricultural Affairs agbogota@fas.usda.gov

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 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. It is also important to note that distribution channels have become more efficient with the increased presence of foreign competitors.

Sub-sector Profiles

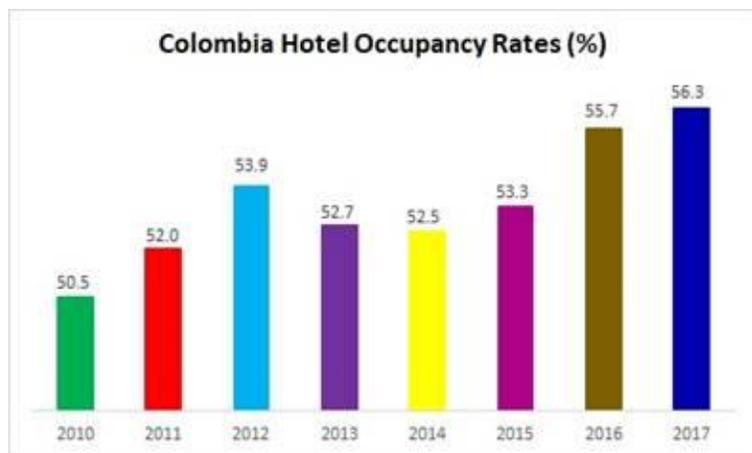
HOTELS

The Colombian Government created COTELCO over 60 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 (MINCIT) 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 uniform services according to the category of the hotel.

A Presidential Decree offered tax relief for hotels built between January 1, 2003 and December 31, 2017. The Government granted the tax relief for 30 years beginning the year when the hotel starts operating. This law provided incentives for investment in the hotel sector, resulting in the exceptional growth and increase of international hotel chains in Colombia. However, the recent tax reform changed the abovementioned benefit and stated that those hotels must start paying 9% income tax. The same tax reform increased the VAT from 16% to 19% affecting Colombian consumer decisions, including lodging and vacation related expenses. COTELCO considers that this new tax scenario deeply affects legal establishments and the share of illegal lodging establishments will continue increasing in the country.

Colombia Hotel Occupancy Rates

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 niche business markets, such as business conventions, annual meetings, social functions and medical tourism. Foreign visitors are mainly from the United States, Venezuela, Ecuador and Brazil. Foreign tourism to Colombia increased 28.3% in 2017 up to 6,535,182 visitors, compared to 2016.



Source: DANE

The table below provides information on main hotel chains in Colombia.

Hotel Chains in Colombia – 2017

COMPANY	SALES (\$ MILLION)	WEBSITE
GRUPO DECAMERON	178	https://www.decameron.com
HOTELES ESTELAR	88	https://www.hotelesestelar.com/
TOUR VACATION HOTELES AZUL SAS	68	https://www.onvacation.com/
GRUPO DANN	44	https://www.hotelesdann.com/
RS CORP	37	
HOTELES ROYAL	37	https://www.nh-hotels.co/
GRUPO CBC SA	28	https://www.cbc.com.co/
PROTUCARIBE SA	28	https://www.hotellasamericas.com.co
GRUPO ROBLE	27	http://www.gruporable.com
INVERSIONES CAMPO ISLEÑO SA	22	

Source: La Barra Magazine and various online sources

RESTAURANTS

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

ACODRES estimates that restaurant sector sales in Colombia have grown 152 percent in the last decade, and estimates that Colombia has 65,000 restaurant establishments. The illegal restaurant share is up to 50% of the market, which is the main threat this sector faces. The growth in the restaurant sector is primarily due to increases in tourism. Principal tourist cities are Cartagena, Medellín, Cali and Bogotá. It is important to mention that dining out is an increasing trend for Colombians.

The table below provides information on main foodservice chains in Colombia.

Foodservice Chains in Colombia – 2017

COMPANY	BRANDS	SALES (\$ MILLION)	WEBSITE
GRUPO NUTRESA SA	EL CORRAL/ EL CORRAL GOURMET/ BOGOTA BEER STATION/ LEÑOS & CARBON/ LEÑOS Y CARBON GOURMET/ TACO BELL	168	http://www.elcorral.com/
GRUPO CREPES & WAFFLES SA	CREPES & WAFFLES	154	http://crepesywaffles.com.co/
MCDONALDS CORP	MCDONALDS	126	http://www.mcdonalds.com.co/
FRISBY SA	FIRSBY/ SARKU JAPAN/ CINNABON	115	http://frisby.com.co/
DOMINO'S PIZZA INC	DOMINOS	68	https://www.dominos.com.co/
AVESCO	KOKORIKO	58	https://www.kokoriko.com.co/
RESTCAFE SAS	OMA	52	www.cafeoma.com/
ANDRES	ANDRES CARNE DE RES/ ANDRES D.C.	45	http://www.andrescarnederes.com/
INVERSIONES INT COLOMBIA	KFC	43	https://espanol.kfc.com/
ZONA K	DINER/ CLUB COLOMBIA/ IL POMERIGIO/ RESTAURANTE ZONA K/ BALZAC/ WATAKUSHI	33	http://www.zonak.com.co/

Source: La Barra Magazine and various online sources

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. In addition to Colombian preference for fast food restaurants, consumers are becoming more attracted to fast casual restaurants where they can find higher quality food at affordable prices.

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 2017 Colombian population is 49.2 million with almost 23 percent within the age range of 0 to 14 years, or the ages of likely attendance in school. It is estimated that five million are enrolled in private schools. Most schools serve lunch, which is often mandatory at the elementary and middle school levels and optional for high schools. Some schools contract the service from catering companies and some others have kitchens and prepare food on site. Foods 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 and addressing 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. 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 a good 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.

The table below provides information on main institutional companies in Colombia.

Institutional sector Chains in Colombia – 2017

COMPANY	SALES (\$ MILLION)	WEBSITE
SODEXO SAS	160	https://co.sodexo.com/
COMPASS GROUP SERVICES COLOMBIA SA	131	www.compass-group.com.co/
GASTRONOMIA ITALIANA EN COLOMBIA SAS	63	https://www.archies.co/
PROALIMENTOS LIBER SAS	35	http://www.proalimentosliber.com/
SALAMANCA ALIMENTACION INDUSTRIAL SA	28	http://www.salamanca.com.co/
IMC AIRPORT SHOPPES SAS	25	http://www.imccolombia.com/
SERVIHOTELES SA	18	http://servihoteles.com.co
PETROCASINOS SA	16	https://www.petrocasinos.com/
ESTRADA NAVARRO SAS	16	
ECOALIMENTOS SAS	13	

Source: La Barra magazine and various online sources

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. 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.

Colombian imports of Consumer Oriented Products from the United States

Product category	2017 (dollars)	2012 - 2017 Change
Consumer Oriented Agricultural Total	565,816,196	78%

Pork & Pork Products	161,710,377	209%
Food Preps. & Misc. Bev	72,434,515	7%
Poultry Meat & Prods. (ex. eggs)	68,180,660	110%
Dairy Products	56,208,129	183%
Processed Vegetables	24,359,695	87%
Meat Products NESOI	23,085,477	521%
Fresh Fruit	20,824,844	-42%
Dog & Cat Food	20,376,866	194%
Chocolate & Cocoa Products	17,713,843	-1%
Tree Nuts	15,262,962	95%
Non-Alcoholic Bev. (ex. juices, coffee, tea)	15,093,997	531%
Beef & Beef Products	15,018,311	362%
Wine & Beer	12,859,193	31%
Condiments & Sauces	12,644,348	41%
Processed Fruit	10,693,688	118%
Snack Foods NESOI	6,781,437	-9%
Tea	3,150,737	-73%
Fruit & Vegetable Juices	3,023,455	-46%
Nursery Products & Cut Flowers	2,245,570	-19%
Fresh Vegetables	1,597,631	432%
Coffee, Roasted and Extracts	1,120,260	-7%
Spices	736,141	82%
Eggs & Products	694,060	-36%

Source: BICO

SECTION IV: BEST PRODUCT PROSPECTS

U.S. Agricultural Product Market Potential

Colombia is already an important market for America's farmers and ranchers. In 2017, the United States exported \$2.5 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 product 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	Pork and pork products
Rice (up to quota)	Vegetable oil	Turkey
Soybeans	Yeasts	Duck
Lentils	Sugars and sweeteners	Bone-in beef cuts
Peanuts	Soybean oil	Bovine livers
Wheat	Glues based starch	Fresh fruits
Chickpeas		Beer
		Dried fruits
		Fruit juice
		Tree nuts

For further information on TRQs please check the following links:

<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/>

Top consumer-oriented products imported from the World	Top consumer-oriented products imported from the United States
--	--

<ul style="list-style-type: none"> • Food preparations • Frozen swine meat • Fresh apples • Beer made from malt • Food preparations for infants, Retail Sale • Frozen chicken cuts and edible offal (including livers) • Nonalcoholic Beverages • Wine • Milk and cream in powder, concentrated, not sweetened • Frozen prepared potatoes, otherwise but vinegar 	<ul style="list-style-type: none"> • Pork and pork products • Food preparations and miscellaneous beverages • Poultry meat and products (ex. eggs) • Dairy products • Processed vegetables • Meat products • Fresh fruit • Dog and cat food • Chocolate and cocoa products • Tree nuts
--	--

Products not present because they face significant barriers

The introduction of new U.S. processed meat products has been recently affected due to the decreasing number of U.S. states that can issue Certificates of Free Sale (COFS) for those products. Per Resolution 26174 of 2013, the Colombian food safety authority INVIMA (Colombian FDA equivalent), requires importers to submit a COFS when registering a new food product for sale in Colombia. Additionally, the implementation of Decree 539 of 2014 and Resolution 719 of 2015 has created issues for processed foods with a content of over 20% animal-origin ingredients, due to the lack of “sanitary export certificates” at the U.S. federal level.

For further information, please check the FAIRS GAIN report, available at <https://gain.fas.usda.gov>

**SECTION V: POST CONTACT AND FURTHER INFORMATION
RELATED REPORTS**

Check following link and look for the Food Processing Ingredients Guide, FAIRS and the Exporter Guide:
<http://gain.fas.usda.gov/>

POST CONTACT INFORMATION

Office of Agricultural Affairs (OAA)	USDA Animal Plant Health Inspection Service (APHIS)
U.S. Embassy, Bogotá, Colombia Carrera 45 No. 24B-27, Bogotá, Colombia Telephone: (57-1) 275-4622 e-mail : AgBogota@fas.usda.gov	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	Food Product Registration and Health Permits
Ministry of Agriculture and Rural Development Colombian Institute for Agriculture and Livestock (ICA), www.ica.gov.co Avenida Calle 26 # 85b – 09, Bogotá, Colombia Juan Andres Angulo Mosquera Deputy Manager Animal Health Protection Tel. (57-1) 332-3736 ext. 1201 E-mail: subgerencia.pecuaria@ica.gov.co Marlon Lucio Torres Burgos Deputy Manager Plant Health Protection Tel: (57-1) 332-3754 ext.1301 E-mail: subgerencia.agricola@ica.gov.co	Ministry of Health and Social Protection National Institute for the Surveillance of Food and Medicine (INVIMA), www.invima.gov.co Carrera 10 No 64 -28, Bogotá, Colombia Director Division of Food and Alcoholic Beverages Sergio Alfonso Troncoso Phone: (57-1) 294-8700 Ext. 3920 E-mail: invimasal@invima.gov.co