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Colombia

Food Service - Hotel Restaurant Institutional

Hotel Restaurant Institutional (HRI) Annual 2016

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Report Highlights:

Hotel occupancy rates remain stable at 53.6 percent in 2015, 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 have paralleled per capita income growth.

Post:
Bogota

Author Defined:
SECTION I: MARKET SUMMARY

Market Narrative

Colombia is the largest consumer of U.S. agricultural products in South America, followed by Peru and Chile. In fiscal year (FY) 2016 U.S. agricultural exports to Colombia were valued at \$2.4 billion. Trade in U.S. agricultural products to Colombia has benefited 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), the European Union, South Korea, Costa Rica and a larger trade bloc, the Pacific Alliance, which includes Mexico, Peru and Chile. Colombia is awaiting final legislative and judicial approvals for FTAs with Israel and Panama. Colombia is currently negotiating FTAs with Turkey and Japan.

Colombian Gross Domestic Product (GDP) grew at 3.1 percent in 2015, slower than previous years growth rates, but still higher than other Latin America 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 -- 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.

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. Consumption in hotels and restaurants grew 5.6% in 2015.

Restaurants and Food Service Sector

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.

According to Euromonitor, food service sales in Colombia increased five percent in 2015. The sector's transactions grew by two 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 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.

Hotel Industry

The DANE reports that hotel occupancy rates in 2015 were 53.6 percent, slightly higher compared to 2014 (52.4 percent). The hotel sector generates approximately 80 jobs per 100 rooms, according to the Colombian Hotel Association (COTELCO). The growing informal hotel sector is considered the principal threat to the industry by COTELCO. 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 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 Bucaramanga. However, the drop in oil prices has affected the hotel industry in cities where oil industry has a major relevance like Yopal, where occupancy rate was 25 percent in 2015. Growing room supply in Colombia and local currency depreciation have resulted in a decrease in lodging rates, from \$124 in 2014 to \$93 in 2015.

Advantages and Challenges for U.S. Exporters

Advantages	Challenges
The U.S.-Colombia CTPA expands opportunities and market potential for many agricultural	Colombia has trade agreements with many other countries increasing competition with

products.	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 (24kg/year), compared to other Latin American markets.
Colombia is the 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 domestic consumers with fast changing 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: MARKET ENTRY

Entry Strategy

It will be critical for U.S. exporters entering the Colombian market to understand the customer's needs and how to meet their purchasing requirements and 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, tastings, among others;
- 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 and Expovinos, 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, National Restaurant Association 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 in 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 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 (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 uniform services according to the category of the hotel. In addition, a Presidential Decree offers tax relief for hotels built between January 1, 2003 and December 31, 2017. The tax relief is granted for 30 years beginning the year when the hotel starts operating. 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	2015
50.4	52.0	53.8	52.6	52.4	53.6

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 niche business 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 - 2015

	Leisure	Business	Education / Convention	Other
Residents	48.1%	41.6%	7.0%	3.4%
Non Residents	38.0%	50.4%	6.1%	5.5%

Source: DANE

Foreign visitors are mainly from the United States (18.7%) followed by Venezuela (15%), Ecuador (6.5%) and Brazil (5.9%).

Colombian Hotel Chains

Company Name	Number of Hotels	Location
Grupo GHL	26	Barrancabermeja, Barranquilla, Bogota, Cali, Cartagena, Girardot, Medellín, Monteria, Neiva, Pereira, San Andrés, Santa Marta, Valledupar, Villavicencio, Yopal
Hotel Estelar	26	Barranquilla, Bogotá, Bucaramanga, Cali, Cartagena, Ibagué, Manizales, Medellín, Paipa, Santa Marta, Villavicencio, Yopal
Hotel Decameron	20	Bogotá, Cartagena, Leticia, Providencia, Quimbaya, San Andres, San Bernardo, Santa Marta, Tota
Hotel Royal	15	Barranquilla, Bogotá, Cali, Cartagena, Medellín
Hotel Dann	8	Bogotá, Bucaramanga, Cartagena, Ibagué, Popayán
BH Hoteles	7	Bogotá, Medellín
Movich Hotels	8	Barranquilla, Bogotá, Cali, Cartagena, Medellín, Pereira

Source: Various online sources

International Hotel Chains in Colombia

Company Name	Number of Hotels	Location
Intercontinental Hotels Group	14	Barranquilla, Bogota, Bucaramanga, Cali, Cartagena, Cúcuta, Medellín, Yopal
Hilton International	13	Barranquilla, Bogota, Cali, Cartagena, Valledupar, Yopal
Marriott	5	Bogota, Cali
Wyndham	10	Barranquilla, Bogota, Bucaramanga, Cucuta, Villavicencio
Melía	1	Medellin
Hyatt	1	Cartagena

Source: 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 MOCIT 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 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 – 2015

Establishment Name	Global Brand Owner	Outlets	Market Share (%)	
			2014	2015
Subway	Doctor's Associates Inc	369	6.4	8.0
Helados Mimo's	Productora y Comercializadora de Alimentos Ltda	226	3.8	3.6
Juan Valdez	Federacion Nacional de Cafeteros de Colombia	239	3.9	4.4
El Corral	Grupo Nutresa	207	8.8	8.2
Oma	Restcafe SAS	203	2.8	3.4
Frisby	Frisby SA	200	7.2	6.8
Cosechas Express	Cosechas	180		
Dunkin' Donuts	Dunkin' Brands Group Inc	169	2.3	2.1
Sandwich Qbano	Sandwich Qbano SA	164	3.6	3.8
Helados Popsy	Inversiones El Cerrito Ltda	144	1.6	1.5
Presto	Frayco SA	139	2.7	2.6
Kokoriko	Avesco SA	127	7.0	6.5
Jeno's Pizza	Telepizza SAU	90	1.7	1.2
McDonald's	McDonald's Corp	84	6.5	6.1
Crepes & Waffles	Crepes & Waffles SA	82	7.9	7.6
Domino's Pizza	Domino's Pizza Inc	58	1.4	1.6
On the Run	Exxon Mobil Corp	56		
La Brasa Roja	CBC Ltda	54	1.4	1.3
Yogen Fruz	Yogen Fruz Canada Inc	51		
PPC	PPC SA	52		
Pan Pa' Ya	Pan Pa' Ya Ltda	50	2.2	2.1
Sr Wok	Díaz y Restrepo SAS	48	1.1	1.1
Don Jediondo	Don Jediondo Sopitas y Parrillas SAS	47	1.2	1.1
KFC	Yum! Brands Inc	42	1.5	1.6
Archies Pizza	Archies Colombia SA	36	2.3	2.2
Burger King	Burger King Worldwide Inc	35	2.2	1.8
Star Mart	Chevron Corp	35		
McCafe	McDonald's Corp	33	0.9	0.9
Piko Riko	Alimentos Rapidos Piko Riko Ltda	32	1.1	1.1
El gualilo	Sercafe SA	31		
El Carnal	Inversiones El Carnal Ltda	30	0.7	0.9

Bogota Beer Co	Bogota Beer Co SA	27	1.2	1.3
Wok	Lao Kao SA	16	1.8	1.8
Papa John's	Papa John's International Inc	15	0.8	0.9
Others		688	14.0	14.5
Total		4,059	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 2016 Colombian population is 48.7 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 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, 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 and 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

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	
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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. The United States' top 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 Israel and Panama. Colombia is currently negotiating FTAs with Turkey and Japan.

FY2016 Colombian Food Product Rankings by Country of Import

Product Category Harmonized System Code	Rank	Country	Import Value (million dollars)
Meat And Meat Offal		Total	152
HS 02	1	United States	123
	2	Chile	11
	3	Canada	7
	4	Peru	6
	5	Argentina	1
		Other countries	4
Dairy Products		Total	137
HS 04	1	United States	69
	2	Mexico	29
	3	France	5
	4	Poland	4
	5	Uruguay	4
		Other countries	26
Edible Vegetables, Certain Roots And Tubers		Total	189
HS 07	1	Canada	59
	2	China	43
	3	Peru	29
	4	United States	29
	5	Argentina	7
		Other countries	22
Edible Fruit And Nuts		Total	206
HS 08	1	Chile	121
	2	United States	34
	3	Peru	15
	4	Spain	7

	5	France	6
		Other countries	23
Coffee, Tea, Mate And Spices		Total	33
HS 09	1	Peru	9
	2	Sri Lanka	8
	3	India	3
	4	Brazil	2
	5	Ecuador	2
		Other countries	9
Milling, Malt And Starches		Total	29
HS 11	1	Chile	7
	2	Brazil	4
	3	United States	4
	4	Paraguay	4
	5	Canada	2
		Other countries	8
Edible Preparations Of Meat, Fish, Crustaceans, Mollusks		Total	234
HS 16	1	Ecuador	121
	2	Duty Free (Cartagena)	59
	3	United States	30
	4	Chile	13
	5	Spain	4
		Other countries	7
Sugars And Sugar Confectionary		Total	163
HS 17	1	Ecuador	36
	2	Peru	30
	3	Brazil	25
	4	Mexico	22
	5	United States	12
		Other countries	38
Cocoa And Cocoa Preparations		Total	73
HS 18	1	United States	20
	2	Ecuador	17
	3	Brazil	6
	4	Peru	5
	5	Argentina	4
		Other countries	21
Preparations Of Cereals, Flour, Starch Or Milk; Bakers' Wares		Total	202
HS 19	1	Mexico	44
	2	United States	32
	3	Chile	31
	4	Peru	21
	5	Ireland	13
		Other countries	61
Preparations Of Vegetables, Fruit, Nuts		Total	132
HS 20	1	United States	44

	2	Chile	19
	3	Belgium	17
	4	Mexico	10
	5	Netherlands	7
		Other countries	35
Miscellaneous Edible Preparations		Total	332
HS 21	1	United States	105
	2	Brazil	78
	3	Mexico	36
	4	Peru	13
	5	Uruguay	13
		Other countries	87
Beverages, Spirits And Vinegar		Total	422
HS 22	1	FTZ – FEMSA	150
	2	United Kingdom	38
	3	United States	29
	4	Chile	29
	5	Mexico	27
		Other countries	149
Albuminoidal Substances; Modified Starches; Glues; Enzymes		Total	118
HS 35	1	United States	36
	2	Brazil	18
	3	Mexico	10
	4	Denmark	9
	5	China	8
		Other countries	37

Source: Global Trade Atlas

SECTION IV: BEST PRODUCT PROSPECTS

U.S. Agricultural Product Market Potential

Consistent 3.1 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 FY2016, the United States exported \$2.4 billion of agricultural products to Colombia. Top U.S. agricultural exports were corn, soybean meal, soybeans, wheat, rice and food preparations.

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, craft beers 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	Mixes and doughs
Rice (up to quota)	Soybean oil	Infant foods

Soybeans	Vegetable oils	Uncooked pasta
Lentils	Sugars and sweeteners	Pork and pork products
Peanuts		Yogurt (up to quota)
Dried beans (up to quota)		Buttermilk (up to quota)
		Turkey meat
		Prepared tomato products
		Prepared bean products
		Dried mushrooms
		Fresh fruits
		Wine
		Vermouth
		Beef and beef products
		Nuts
		Chewing gum
		Cinnamon
		Whiskey
		Liqueurs and cordials

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

Product	Base Duty	TRQ (MT) 2017	TRQ Annual Increase	Phase Out Period	Safeguard Trigger Level
Yellow Corn	25%	2,680,191	5.0%	12 years	
White Corn	20%	174,212	5.0%	12 years	
Rice	80%	98,448	4.5%	19 years (6 of grace)	120% of TRQ
Sorghum	25%	26,802	5.0%	12 years	
Dried Beans	40.2%	20,101	5.0%	10 years	130% of TRQ
Animal Feeds	10%-25%	247,918	5.0%	12 years	
Pet Food	28%	12,695	8.0%	8 years	
Chicken Leg Quarters (fresh, chilled, frozen)	164.4%	32,898	4.0%	18 years (5 years of grace)	130% of TRQ
Processed chicken leg quarters	70%			18 years (10 years of grace)	
Spent Fowl	20%	478	3.0%	18 years	130% of TRQ
Standard Quality Beef	51.2%	2,680	5.0%	10 years	140% of TRQ
Variety Meats	51.2%	6,067	5.5%	10 years	
Pork Meat*	30%	Unlimited		5 years	
Crude Soybean Oil	24%	37,960	4.0%	10 years	
Glucose	28%	13,401	5.0%	10 years	
Milk Powder	33%	8,858	10.0%	15 years	
Cheese	20%-33%	3,720	10.0%	15 years	
Yogurt	20%	177	10.0%	15 years	

Butter	33%	886	10.0%	11 years	
Processed Dairy Products	20%	1,772	10.0%	15 years	
Ice Cream	20%	531	10.0%	11 years	
Maple Syrup*	5%	Unlimited		5 years	

*As of 2017, pork meat and maple syrup are free of duty as a result of the CTPA TRQ phase-out.

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

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