

The Food and Beverage Market Entry Handbook: Colombia: a Practical Guide to the Market in Colombia for European Agri-food Products



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1 The Food and Beverage Market Entry Handbook: Colombia

This Handbook is intended to act as a reference for those agri-food producers planning for, or in the process of entering, the Colombian market. This Handbook provides **step-by-step guides** on entering the agri-food market in Colombia including relevant information such as **analysis of the Colombian market** for different product categories, **market access** and **market entry procedures**, **IP protection**, **referrals to professional buyers** and a signposting and referral system providing useful contacts and ways to penetrate the Colombian market.

1.1 How to use this handbook


Depending on your stage of market entry, company profile, and product range, different sections within this handbook will be helpful to a different extent for your business strategies.

For those wishing to learn more about the Colombian food and beverage market in general, section 2 provides a general country overview; section 3 provides an overview of the agri-food market; and section 4 an overview on market entry. These latter two sections contain information on: the food and beverage market, market access procedures, customs procedures, SPS and labelling requirements, intellectual property protection, including the status of geographical indications. The information contained within these sections is of a general nature and so may not be relevant for those in the more advanced stages of market entry.

If you want to find out more information relevant for your product, then check out the **Market Snapshots for Selected Products** (section 5). This content illustrates the market situation, market access procedures, SPS requirements etc. specific for this product or product category. This information will provide more industry specific information to consider as part of any market entry or market expansion strategies.

If you already have decided that the Colombian market is where you want to be, but you need some support, then the **Support Services Directory** can point you in the right direction. Contact information for a service provider, business facilitation support organisation, or from a business contact, could help put you in touch with the right parties who can help you to build your brand in the Colombian market.

2 Country introduction and overview

		
Capital:	Bogotá	
Population:	49.7 million (2018)	
Area:	1.142 million km ²	
Political structure:	<ul style="list-style-type: none"> • Presidential representative democracy • Bi-cameral legislature 	
Major language:	Spanish	
Major religions:	Christianity (93%; of which 79% are Roman Catholic).	
Life expectancy:	74 years (men), 80 years (women)	
Currency:	Colombian Peso (sign: \$); EUR 1 = COP 3 503 (2018 average)	
GDP growth:	3.4% (2019, provisional)	
Exports:	15.9% of GDP (2018)	
Imports:	20.9% of GDP (2018)	
Main exports:	Mineral products (55%); Vegetable products (14%); Chemical products (5%)	
Main imports:	Machinery (24%); Chemical products (16%); Transportation machinery (11%)	
Unemployment rate:	10.1% (October 2019)	
Labour force:	68.7% (October 2019)	
Main industries:	<ul style="list-style-type: none"> • Agriculture: 6% GDP • Industry: 27% GDP • Services: 67% GDP 	
Average household income:	EUR 18 107 (2018)	
Household expenditure on food and beverages:	EUR 2 972 (2018)	
Food and beverage market size:	EUR 42.5 billion (2018)	

Sources: National Administrative Department of Statistics of Colombia; Euromonitor International: Economies and Consumers, 2019a; IMF; UN, World Bank; WHO, ECB.

2.1 Country overview: Colombia at a glance

2.1.1 Past economic and political trends

- *The import substitution industrialisation policy followed during the 1950s and 60s was subsequently replaced by an export promotion policy.*
- *While the country faced significant challenges and turbulence in the mid/late 1970s and 1980s, the economy was carefully managed, ensuring a stable and modest economic performance.*
- *The country underwent economic reforms between 1989 and 1992, and the economic performance of the country was positive during the early 1990s. However, major challenges arose in the late 1990s.*
- *Long term efforts to establish peace with revolutionary groups were successfully concluded in 2016.*

The Republic of Colombia was established in 1886, with Panama subsequently separating from the Republic in 1903. During the period 1958 to 1974 – the so-called National Front period - the country's two main political parties agreed to rotate power every four years, with a referendum validating this arrangement. During the first decade of this period, a policy of import-substitution industrialisation was followed; this was later replaced by an export promotion policy which focused both on traditional coffee exports as well as non-traditional exports such as manufactured items.

Elections returned in 1974. However, some revolutionary groups had emerged during the national front period and continued to challenge the government during in the subsequent years. Furthermore, an industry of trade in illicit substances took root in the country. These two developments created a turbulent period in the country's history. The economy, however was quite carefully managed, limiting the impact of both these developments as well as those of international shocks on the economy; hence ensuring a fairly stable and modest economic performance. A peace process to incorporate some of the revolutionary groups was initiated in the late 1980s and resulted in a new Colombian constitution in 1991. Nonetheless, as negotiations with all groups were not successful, some unrest remained during the 1990s and beyond.

Economically, the country underwent reforms between 1989 and 1992 with the aim of promoting trade and competition and improving productivity. Economic performance during the first half of the 1990s was quite good, boosted by increased oil production. Colombia faced economic challenges towards the end of the 1990s, with growth slowing before the economy contracted by over 4% in 1999; and both unemployment and government debt sharply rising. After years of intervention to keep the Colombian peso in a certain exchange rate band in relation to the dollar, the currency was floated in 1999 and the government agreed to no longer intervene.

By the early 2000s, the economy showed some signs of recovery, with government debt peaking in 2002 and unemployment the year after before falling back; growth returning; and inflation falling. Indeed, annual GDP growth was in excess of 4% most years during the 2004-14 period. At the same time a peace process with Revolutionary Armed Forces of Colombia (FARC) restarted in the early 2000s and ultimately

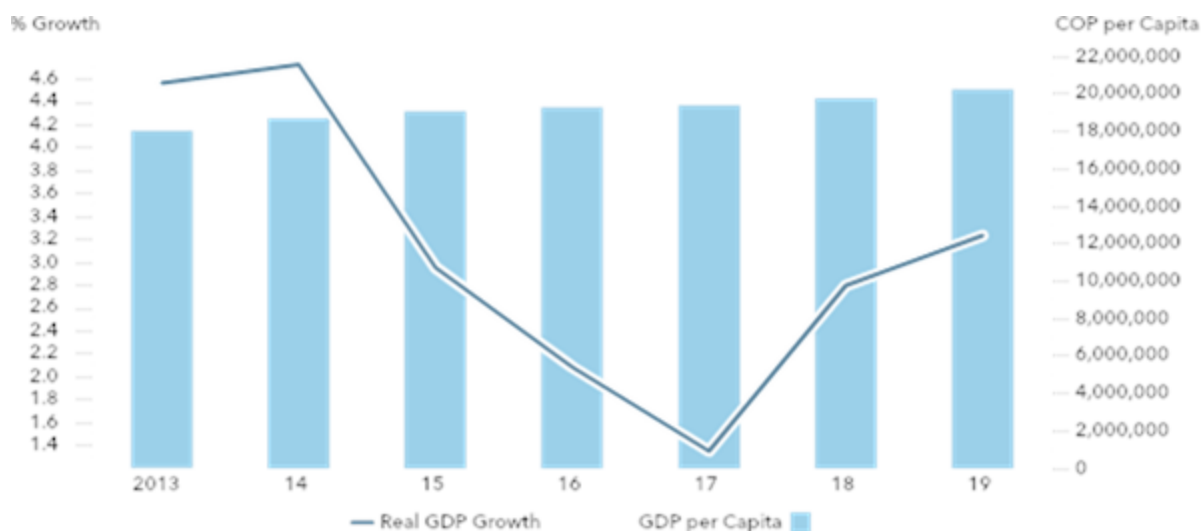
this was successfully concluded in 2016. Most recently, the country has suffered some diplomatic tensions with neighbouring Venezuela, a country which is passing through a period of socio-economic and political challenges.

2.1.2 Current economic situation and mid-term outlook

- **Growing annual growth rates, following 2014-15 fall in oil price.**
- **Colombia is the fourth biggest Latin American economy.**

As noted above, annual growth has been high since the beginning of the millennium; exceeding 4% in most years and approaching 7% in 2007 and 2011. However, growth has slowed in recent years, bottoming out at 1.4% in 2017, before subsequently recovering (Figure 2-1). This slow in growth was partly linked to the fall in crude oil price; while modern manufacturing industries have increased significantly in importance in Colombia, exports continue to be dominated by commodities; crude oil and coffee in particular. The country is now the fourth biggest economy in Latin America after Brazil, Mexico and Argentina.

Figure 2-1: Real GDP Growth and Per Capita GDP in Colombia: 2013-2019



Note: Data for 2019 is forecast. GDP per capita are in constant 2017 prices.

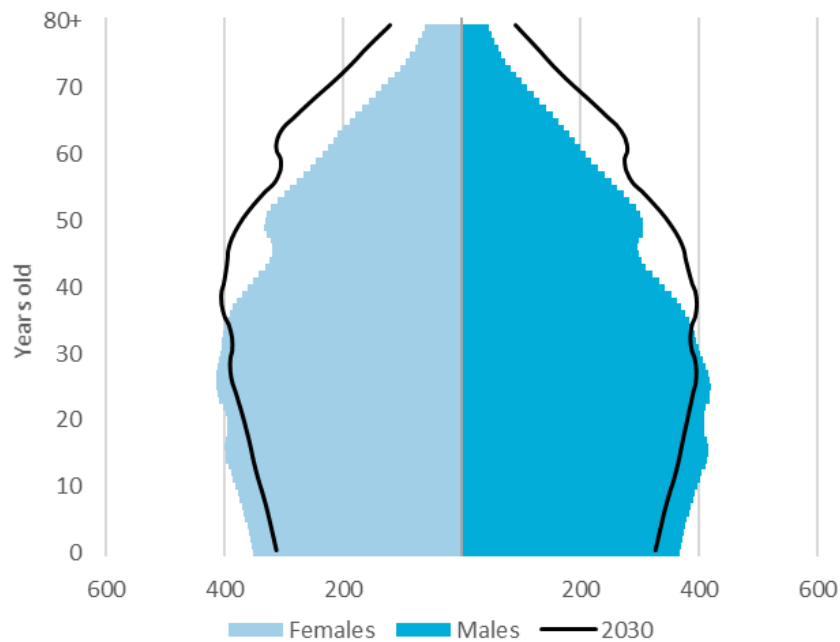
Source: Euromonitor International: Economies and Consumers, 2019.

2.1.3 Populations trends

- **The population has grown steadily in absolute terms, though the rate in percentage terms has fallen. Going forward the growth rate in both absolute and percentage terms is expected to fall.**
- **The ethnically diverse, predominantly urban population is strongly concentrated in the north western half of the country.**

The population of Colombia has grown fairly steadily since the 1980s at just over 0.5 million people per year. The growth rate in percentage terms has fallen steadily over the same period from around 2.3% in 1980 to nearly 1.4% at present. The decline in the rate of growth is predicted to continue over the coming years. In fact, it is expected to come to stagnate around 2050, before slowing declining. The population is predicted to be over 50.2 million in 2020 and 53.1 in 2030. The share of people aged 0-14 years was about 41% of the total in 1980 but has fallen to 23% by 2018. The share of those over 65 years accounted for 8% of total population in 2018 and it is projected to rise to nearly 13% by 2030.

Figure 2-2: Age Pyramid in 2018 and 2030 in Colombia



Source: Euromonitor International: Economies and Consumers, 2019.

The Colombian population is ethnically diverse. Today's population is descended from native American Indian inhabitants, Europeans and Africans. Roughly half of the population considers itself to be "*mestizo*" – a mix of ethnicities – normally white European and American Indian. Around one third identifies itself of European ancestry (mainly Spanish, Italian, French or German). A bit over 10% of the population is Afro-Colombian, and a bit under 5% American Indian. Around three quarters of the population is Catholic and a further 15% protestant.

The population of Colombia is strongly concentrated in the north-Western half of the country; most notably along the Caribbean coast and Andean region which includes the country's three biggest cities. Over three quarters of the population is urban-based.

2.2 Geography and key markets

Colombia is located in the north-western corner of South America, bordered by Panama to the north, Venezuela and Brazil to the east, and Ecuador and Peru to the south. It also has a coastline with the Caribbean Sea to the north and Pacific Ocean to the west. The equator runs through the southern portion of the country.

The country is commonly considered to be divided into five zones:

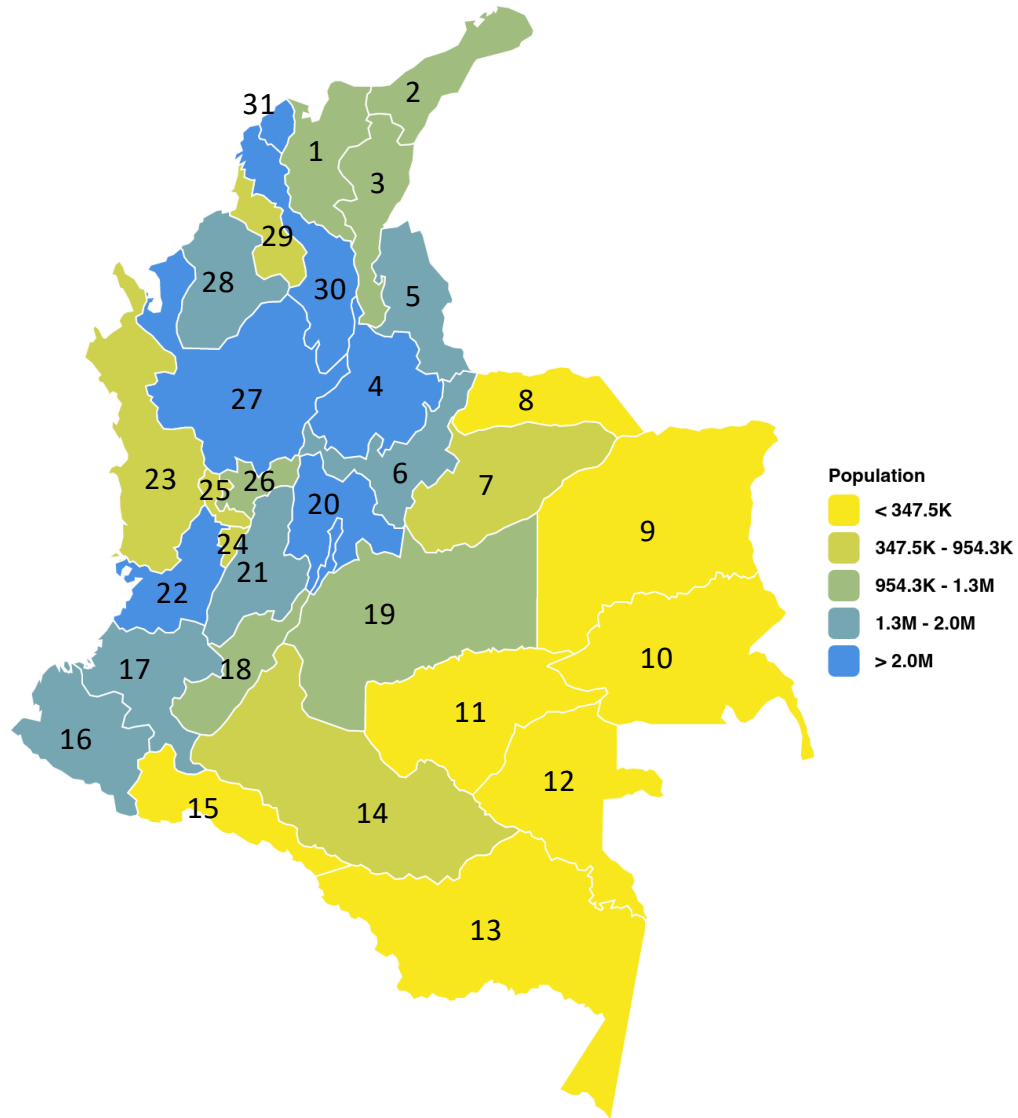
- The **Andean region**, which follows the Andes mountain range across the north western portion of the country. This region comprises most of the urban areas (and hence population) of the country. Climate and weather vary in this region, but in broad terms the altitude determines whether an area is hot, temperate or colder.
- The **Caribbean region**, which comprises the coastal area touching the Caribbean Sea to the north and includes the two major Atlantic ports as well as about 20% of the country's population.
- The **Pacific region**, which follows the Pacific coastline to the west; and which is known for its high biodiversity.
- The **Orinoquía region** to the east, which consists of savanna and wetlands.
- The **Amazon region**, which covers the southern portion of the country (over one third of Colombia's territory) but is covered in rainforest and sparsely populated.

Administratively, Colombia is divided into 32 departments, each of which groups several municipalities; and a capital district. These are further presented in section 2.2.1.

2.2.1 Overview of urban markets

As noted above, there are 32 departments in Colombia, plus the capital district. These, along with their populations are presented in Figure 2-3. This shows the concentration of the population in the north-west half of the country.

Figure 2-3: Administrative divisions in Colombia and their populations



1	Magdalena	12	Vaupés	23	Chocó
2	La Guajira	13	Amazonas	24	Quindío
3	Cesar	14	Caquetá	25	Risaralda
4	Santander	15	Putumayo	26	Caldas
5	Norte de Santander	16	Nariño	27	Antioquia
6	Boyacá	17	Cauca	28	Córdoba
7	Casanare	18	Huila	29	Sucre
8	Arauca	19	Meta	30	Bolivar
9	Vichada	20	Cudinamarca	31	Atlántico
10	Guainía	21	Tolima		
11	Guaviare	22	Valle del Cauca		

The department of San Andrés, Providencia and Santa Catalina is an archipelago in the Caribbean Sea some 600km off the northern coast of Colombia; and is not shown in the map.

* Bogota capital region is a separate administrative division and delineated on the map, surrounded by Cudinamarca (20) to the north, west and east; and Meta to the south.

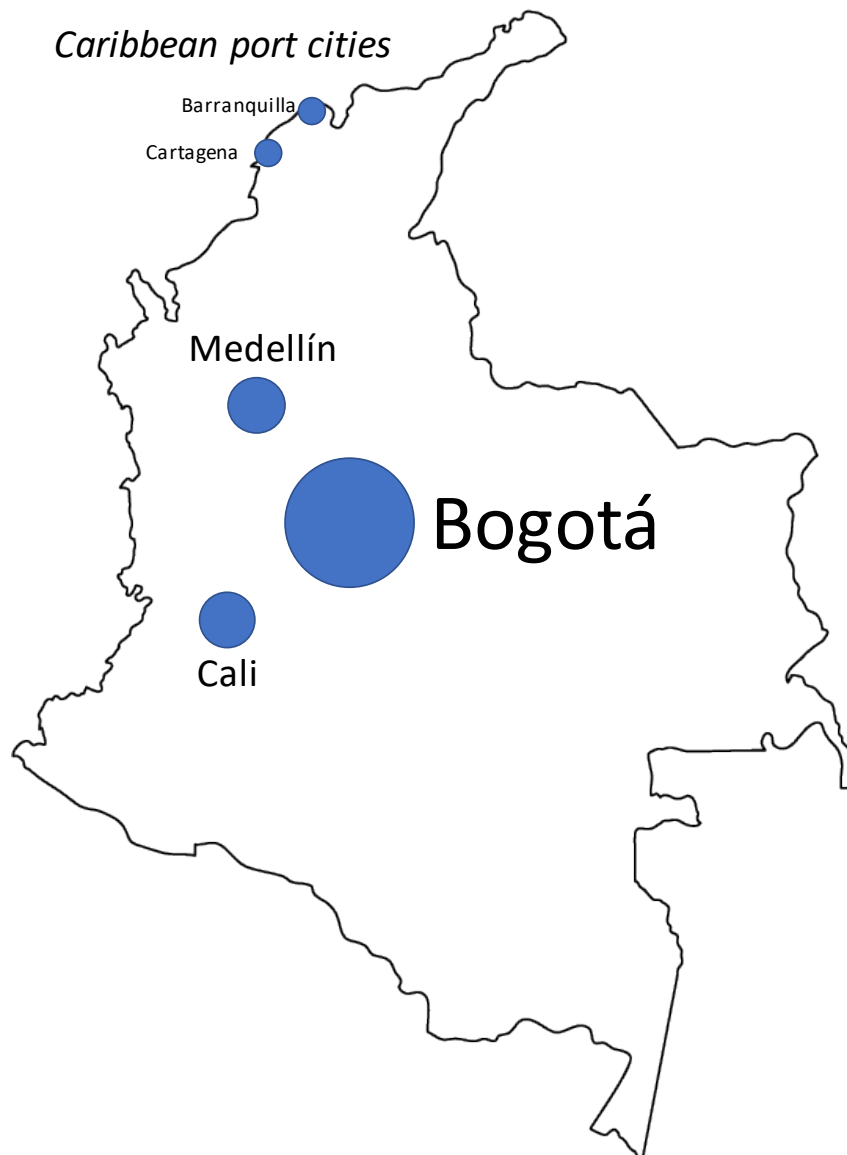
Source: Agra CEAS.

2.2.2 Snapshots of important markets

Following on from the findings of section 2.2.1, the key markets are:

- Bogotá/ capital region
- Medellín
- Cali
- Caribbean port cities: Barranquilla and Cartagena

Figure 2-4: Location of focus markets



Source: Agra CEAS.

Bogotá



Key facts:

Total GDP (current prices): EUR 83.5 billion

Real GDP growth (2018): 3.2%

Population: 8 million (city); about 11 million (metro area)

Bogotá is the country's most populous city by some distance and its capital. The city is located in the centre of the country on a high plateau. It is the administrative, financial and commercial centre of the country, and accounts for roughly one quarter of Colombia's GDP. The city has grown rapidly over the last fifty years, with the number of inhabitants increasing more than five-fold over the period, driven by the forces of urbanisation of the region and migration from rural areas. This growth placed considerable strain on infrastructure (transportation in particular) leading to significant upgrade efforts since the late 1990s.

As noted above, the city is the administrative, financial and commercial centre of the country. The city's economy is based mainly on the service sector. While industry has been historically important, this has moved to surrounding provinces in recent years as the service sector took over. Economically, the city exceeds the Colombian average in most respects; GDP per capita is well ahead of the country average; GDP growth has been as high as 8% per year of late; and income per capita is about 20% above the average of Colombian cities. Average household disposable income, which has shown signs of recovery after a fall in 2015-16, amounted to EUR 21 756 in 2018. Average household expenditures in food and beverages has been slightly rising over the last few years, up to EUR 3 254 in 2018.

Roughly half the city's recognised residents are classified as lower middle class or above; with some 5% considered upper class or upper middle class. The population of the city is predominantly (over 98%) mestizo or white. It is widely accepted that Bogotá has a significant "floating" population, part of which may not be captured in official demographic statistics.

As is to be expected from a large city, a wide range of international food is available in addition to more traditional products and dishes. The latter is often based on potatoes and maize. Popular examples includes *ajjaco* (a soup typically made of chicken, potatoes, maize and herbs); *fritanga* (a plate of fried

meat and staples); and *Puchero Santafereño* (stew). Some of these traditional dishes have Spanish influences.

Sources: DANE; Euromonitor International: Economies and Consumers, 2019; World cities culture forum; Colombia Reports

Medellín**Key facts:**

Total GDP (current prices):	<i>EUR 25.4 billion</i>
Real GDP growth (2018):	<i>2.6%</i>
Population:	<i>2.5 million (city); about 4 million (metro area)</i>

Medellín is situated towards the north-west of the country in the middle of the Colombian Andes. The city itself has a population of around 2.5 million. When the nine neighbouring cities which form the Medellín metropolitan area are also taken into account, the population approaches 4m and accounts for a bit over one tenth of the country's GDP.

A plan was set up in the 1950s to make Medellín Colombia's first metropolitan area, and as a result of this the population of the city grew rapidly during the second half of the 20th century, providing workers for its textile industries. Since the beginning of the 21st century the city has undergone major development.

The city is a major industrial centre, with major products including steel, textiles, pharmaceuticals and food and beverages. Subsequently, the metro area is commonly considered the main exporting region of Colombia. Medellín is also the fashion centre of Colombia. The city is well known for its entrepreneurial spirit, with over 95% of companies active in the city considered to be micro or small.

Medellin has strong historical connections to Spain. Historically the city received a high number of immigrants from Spain (Basque country in particular), as well as some from other European countries. The culture of the city is closely linked to the Paisa culture – one of Colombia's main five regional cultures. This culture is considered to have its roots in Spanish culture, with corresponding impacts on the way of

doing business, entertainment and food. For example, breakfast is commonly accompanied by a cup of hot chocolate.

Typical regional dishes include: The Paisa tray (beans, rice, meat, fried chorizo, fried egg and salad); and a wide range of sweet and savoury baked goods called *parva*.

Demographically, the composition of the population of Medellin is broadly in line with the national average in terms of both age composition and ethnicity. Per capita income in Medellin is considerably ahead of the national average, and roughly 60% of the population is considered to be lower middle class or above. Indeed average household disposable income was EUR 17 277, in 2018. Of these, about EUR 3 057 were allocated to food and non-alcoholic beverages expenses.

Sources: DANE; Medellin chamber of commerce; Euromonitor International: Economies and Consumers, 2019; Colombia Reports.

Cali



Key facts:

Total GDP (current prices): EUR 16.1 billion

Real GDP growth (2018): 2.9%

Population: 2.5 million (city); about 3.5 million (metro)

Cali, or Santiago de Cali, is Colombia's third largest city and the only major city with access to the Pacific coast through the important seaport of Buenaventura just over 100 km away.

The city was historically a strong agricultural centre. However, during the 20th century industry became increasingly important, attracted both foreign investment and migrants from other areas of the country. Development during the second half of the 20th century was successfully driven by different public-private partnerships; however, following the economic challenges Colombia faced at the end of the 1990s, the development of the city has relied more on global market forces. The city and its surrounding department of Cauca are now of less importance for Colombian agricultural production than historically; however, it is important for industrial production.

Culturally, the city is known as the sports capital of Colombia, having been the first Colombian city to host the Pan-American games in 1971, and acting as home to two of Colombia's biggest football teams. The sport infrastructure is also strong.

The traditional agricultural production of the region around Cali, which includes a fair amount of exotic fruits, has influenced the traditional cuisine of the city.

As Cali is a non-coastal city, in the past, population grew at lower rates compared to other Colombian cities. However, over the last 70 years, the city has started seeing significant demographic growth, which continued throughout the years until it reached its current spot as the third most populous in Colombia. In Cali, the middle class accounts for 39.3% of the total population. The average household disposable income indeed amounted at EUR 18 408 in 2018, of which about EUR 3 092 were allocated to food and non-alcoholic beverages expenses.

Sources: DANE; World Bank; Euromonitor International: Economies and Consumers, 2019; Colombia Reports.

Caribbean port cities: Barranquilla and Cartagena



Key facts:

Total GDP (current prices): EUR 9.9 billion (Barranquilla); EUR 6.7 billion (Cartagena)

Real GDP growth (2018): 2.2% (Barranquilla); 3.3% (Cartagena)

Population: About 2.1 million (Barranquilla); About 1.5 million (Cartagena)

Barranquilla and Cartagena, Colombia's fourth and fifth largest cities respectively, are both located along the Caribbean coast, approximately 120 km from one another. Both cities host major ports and are home to free/economic zones.

Barranquilla lies next to the mouth of the Magdalena river, and hence a major port and transport hub. The economy is based not only on transport, but also commerce, finance, industry and fishing. The city is well known in Colombia for its carnival.

Cartagena, also a major port. It also plays an important role for the country's petrol and chemical industries. It is also a popular tourist destination.

Both cities exhibit certain demographic and cultural similarities. The cities are ethnically even more diverse than Colombia as a whole, with notable afro-Caribbean influences on culture. This diversity has also influenced the cuisine of the cities and region, which is based on a combination of Spanish, Amerindian and Caribbean influences.

Sources: DANE; World Bank; Colombia Reports

Domestic agricultural production and regions

Colombia is one of the most biodiverse countries in the world; and therefore, it follows that it has a strong agricultural sector. The varied topography and climate of the country strongly impacts the range of agricultural production across the country. Notable agricultural products, together with the regions in which they are produced are:

- **Coffee** – Colombia is the third largest producer of coffee in the world after Brazil and Vietnam, with around one fifth of all cultivated land dedicated to the cultivation of this crop. Production comes from the mountainous areas of the country, with the three departments of Caldas, Quindío and Risaralda particularly important.

- **Cut flowers** – a non-traditional industry that largely evolved in the second half of the twentieth century to propel Colombia to the position of second largest global exporter of the product. The savannah area around Bogotá in the centre of the country is the main area of production.
- **Fruit** – the country produces a range of tropical fruits, bananas in particular; production of which is particularly high in the northern state of Antioquia and along the Caribbean coast.
- **Sugarcane** – which is largely used for bioethanol production and is grown in the Cauca valley.
- **Cattle** – the country has the fourth highest cattle production in Latin America. Production is spread across the country and the use of pastures as a feeding method is high.

While agricultural production overall is high, there are some challenges. Most notably a lot of farmers and agricultural works own limited or no land; and climate change poses a substantial threat to some agricultural production.

3 Introduction to the food and beverage market and consumers

3.1 Overview of the food and beverage market and demand for imported products

3.1.1 F&B market summary

As previously noted, Colombia's abundant natural resources, diverse climate and topography support a strong agricultural production. Currently, Bogotá is the main food and beverage market and production center in Colombia; the city also accounts for nearly 40% of total imported food and beverages. Although per capita consumption of imported food and beverages is rather low compared to other countries in the region, the sector is set to grow at double-digit rates over the next few years. This growth is partly due to the expansion of mass grocery retailers with modern storage facilities. Also, retailers are expanding beyond the main commercial cities.^{1 2}

3.1.2 International trade in F&B

As reported above, Colombia is a large agri-food producer, although it relies on imports for some commodities, such as corn, wheat and soybeans. However the country also imports a notable amount of packaged food and alcoholic beverages, as described in detail further below.

In 2017, the top origin of imported food products was United States with a market share of 32% (in value terms). Brazil and Ecuador followed with about 8% each. Finally, Mexico accounted for 7% of all Colombian food product imports by value.³ In regional terms, the EU is the third largest importers, preceded by Latin America and North America. Notably, Spain, Germany and the Netherlands stand out as major European exporters to Colombia in terms of value.

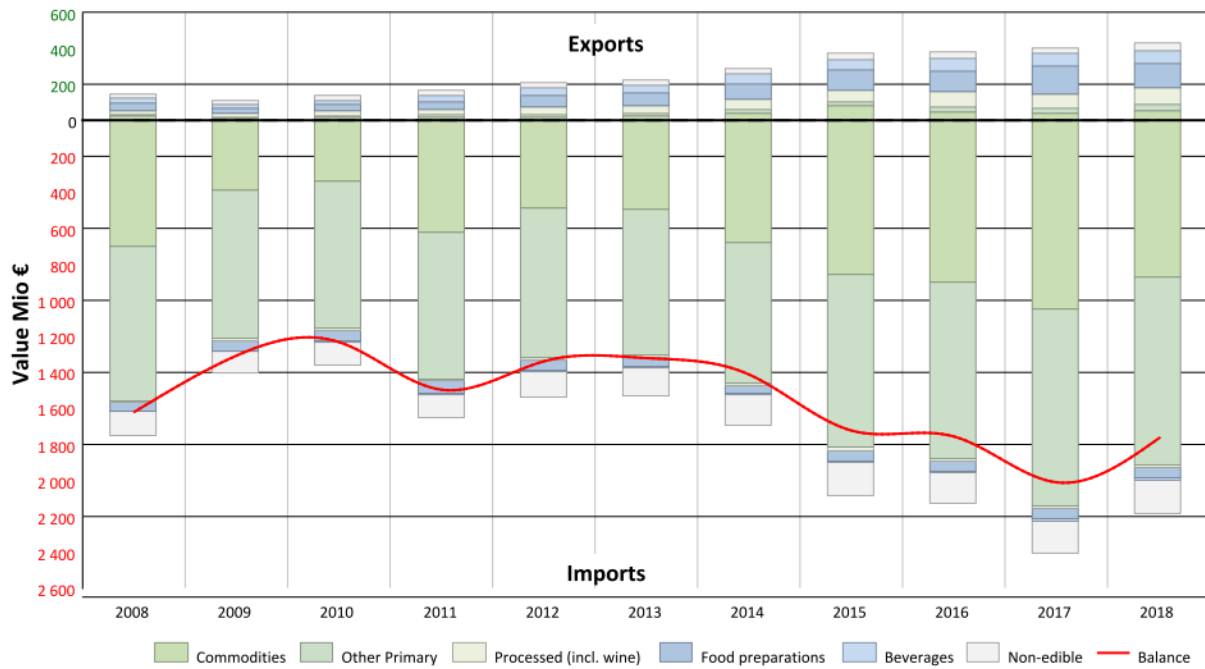
The EU has a deficit in exports of agri-food products to Colombia. The value of EU agri-food exports to Colombia, which has been growing at a fast pace, was under EUR 500 million in 2018 (Figure 3-1). EU imports from Colombia, on the other hand, have recorded a growing trend since 2008 (although with some fluctuations), peaking to EUR 2.5 billion in 2017, down to 2.2 in 2018.

¹ Invest in Bogotá: Food and Beverages Industry, <https://en.investinbogota.org/investment-sectors/food-and-beverages-industry-bogota>

² Select USA: Colombia - Processed Food and Beverages, <https://www.selectusa.gov/article?id=Colombia-Processed-Food-and-Beverages>

³ WITS statistics: Colombia Food Products Imports By Country 2017, https://wits.worldbank.org/CountryProfile/en/Country/COL/Year/LTST/TradeFlow/Import/Partner/by-country/Product/16-24_FoodProd

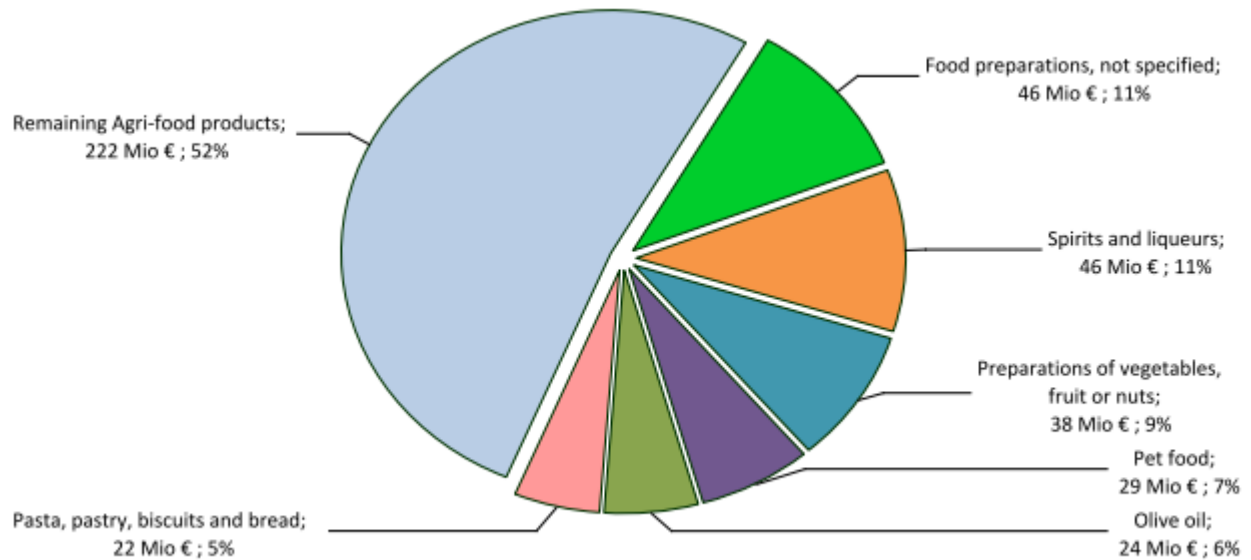
Figure 3-1: Structure of EU agri-food trade with Colombia, 2008 to 2018



Source: European Commission: agri-food trade statistical factsheet, European Union – Colombia. Based on Eurostat-COMEXT data.

As illustrated in Figure 3-2, the key EU food and beverage exports to Colombia are: spirits and liqueurs, as well as food preparations (11% of exports by value, each), followed by preparations of vegetables, fruit or nuts (9%). Other notable categories are pet food (7%), olive oil (6%), and pasta, pastry, biscuits and bread (5%).

Figure 3-2: Top EU agri-food exports to Colombia in 2018



Source: European Commission: agri-food trade statistical factsheet, European Union – Colombia. Based on Eurostat-COMEXT data.

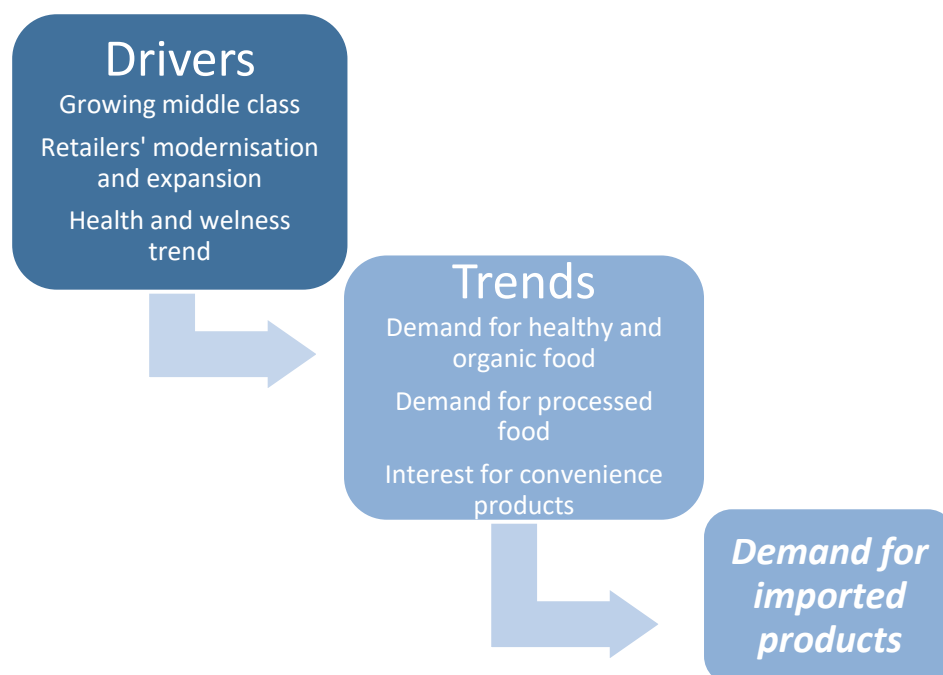
3.1.3 The market for imported F&B

As noted in section 3.1.2, Colombia relies to an extent on imports of commodities, to meet the growing demand of the food and beverage processing industry. Although commodities account for a large part of imported products, there are opportunities for exporters across several agri-food segments. Notably, Colombia is a growing market for value-added, processed and packaged food and beverages products. Amongst the segments that offer more opportunities there are fruit and vegetables, dairy, chocolate, infant food, olive oil, pasta and biscuits.

3.2 Growth Drivers and Trends

As outlined in Figure 3-3, growth of exports to Colombia is primarily driven by retailers' modernisation and expansion across the country, and the subsequent availability of a wider choice of imported products. Furthermore, in Colombia we can observe an increased demand for healthier products, driven by health-conscious consumers, who are on the rise; and partly boosted by an aging population. Furthermore, a growing middle class, busy lives and above all the increased participation of women in the workforce, is driving the growth in the packaged and convenience food segments. Indeed, in the view of economic situation, Colombian's food and beverage market has been adjusting towards daily needs of middle class, where manufacturers are often proposing tailor-made line of products of this socioeconomic segment. While the majority of products are domestically produced (and/or traditional), some imported products are gaining popularity; from certain fruits (e.g. apples, pears) to the increasingly important category of processed and convenience food.

Figure 3-3: Growth drivers and trends – the Colombian food and beverage market



Source: Agra CEAS based on European Commission agri-food factsheet and Euromonitor International (2019).

Further details on consumer profiles and preferences are presented in section 3.3.

3.3 Consumer profiles and preferences

3.3.1.1 Consumer profiles

Consumer trends in Colombia may vary at regional as well as city to city basis. Disposable income of Colombians located in cities may also differ due to running costs and stratification system, which effectively bring much higher utilities bills⁴.

Despite the advantageous economic outlook in recent years, the gap between rich and poor has been increasing, as over 27% of society lived below national poverty line in 2017. Moreover, the Colombian middle class of consumers has grown in size. This can be linked to various public policy and poverty reduction initiatives - in years 2012-2017, the middle class increased in number by 18%⁵.

In general terms, consumers in Colombia remain price-sensitive. However, in recent years Colombians have also started to pay more attention to health-added value of products. In the view of increasing obesity rates, consumers prioritise healthy products when making dietary purchases⁶. Colombian

⁴ Euromonitor International: Economies and Consumers, 2019.

⁵ Euromonitor International: Economies and Consumers, 2019.

⁶ Obesity update 2017; OECD, <https://www.oecd.org/els/health-systems/Obesity-Update-2017.pdf>

consumers have been also more aware about the e-commerce retail channels, currently booming in the country.

However, it should be also pointed out that consumer trends are strictly linked to socioeconomic status, which often determines motivation for purchasing European produce as well as the modes of consumption. It should be also remembered, as mentioned earlier, that Colombian consumer profile is also impacted by the considerable gap between rich and poor.

Against the background set out above, the following notable groups of consumers can be identified.

High net worth individuals

The upper class of consumers in Colombia can be characterised by high expenditure on quality and luxurious products. High net worth individuals very often place exclusivity of the product as one of the main reasons for purchase, underlining social status. The number of millionaires increased significantly by almost 40% in years 2007-2012 to 35 000 individuals⁷; and nowadays, this consumer group numbers just under 50 000 people (whose fortunes represent 22% of GDP).⁸ This group of consumers is the one of the targets for EU premium and gourmet products, as they tend to be more aware about EU quality products and have the purchasing power to afford such products. Colombian high net worth individuals tend to have their products delivered, and therefore often use specific distribution channels.

Affluent consumers

This group of consumers is still willing to pay a higher price for quality products and is interested in new products which are unknown to the average Colombian. Affluent consumers are generally keen on adopting new eating/drinking habits due to their experiences with other food and drinks culture. However, given the gap between rich and poor, this group do not constitute considerable part of the society. Like high worth individuals, this niche segment is more likely to be interested in EU high-quality food products. Affluent consumers in Colombia also often base their purchasing approach on health-added value and so may be interested in such products from the EU, e.g. olive oil.

Middle class consumers

Constituting the largest part of Colombian society, middle class consumers are also more price-sensitive than the other two groups when planning food shopping. As previously mentioned, this group of consumers has been increasing rapidly in the recent years and is predicted to continue to do so in the next years.⁹ The middle-class consumer first and foremost considers price as a major factor for their purchasing decision. Secondly, retail channel constitutes a crucial factor when purchasing products, as middle class consumers are more likely to purchase products through traditional retail channels (which

⁷ More and more millionaires created in Colombia; <https://colombiareports.com/millionaires-created-colombia/>

⁸ Middle class on minimum wage? Colombia's debate on wealth and class; <https://colombiareports.com/middle-class-on-minimum-wage-colombias-debate-on-wealth-and-class/>

⁹ Bogota's middle class now represents more than 50% of the city's population; <https://en.investinbogota.org/news/bogotas-middle-class-now-represents-more-50-citys-population>

may be seen to offer more affordable prices); though modern retail channels are increasingly important (section 4.4.2.1).

Young consumers

Young consumers in Colombia are in general curious for different food and drink options, which effectively results in novelty-seeking behaviour. Furthermore, this group of consumers has been impacted the most by digitalization process, thus the retail channels they commonly use includes also e-commerce. Moreover, the young generation has developed certain level of brand awareness, which often plays a role when making a purchase.

Senior consumers

As previously described (2.1.3), Colombia's population is ageing, with increase of 29% of people above 60 years old in years 2012-2017; and this demographic is forecast to further grow in coming years. While the majority of senior consumers in Colombia have limited disposable income (e.g. because they are pensioners), the increasing size of this demographic makes it potentially interesting. Generally speaking, this group of consumers tends to be rather conservative in their approach to food purchases, paying great attention to traditional and known products.

Female consumers

Changes in structure of workforce have brought significant increases in female employment¹⁰, especially in larger cities in Colombia. As an effect, female consumers are known for their price-consciousness and different tastes and preferences.

3.3.2 Cultural Sensitivities and Other Considerations

3.3.2.1 Days of celebration

The most important feast days in Colombia are outlined below:

- Christmas and New Year period, when Colombians gather for lunches, dinners and parties among co-workers, friends and family. Christmas and New Year gift baskets that are offered by companies to their employees or exchanged among friends and families, usually include foodstuffs. Premium imported foodstuffs could be also given as presents for Christmas.
- The Day of Love and Friendship, the equivalent of St. Valentine's Day, which is celebrated in Colombia on the third Saturday of each September. This is a day not only for partners but also for friends and family.
- Mother's Day, celebrated on the second Sunday of each May. Restaurant occupancy levels typically peak on this day and premium food or beverage products may be given as gifts.

¹⁰ Colombia: Female labour force participation;
https://www.theglobaleconomy.com/Colombia/Female_labor_force_participation/

3.3.2.2 Traditional cuisine

Colombian cuisine has mostly Spanish, African, Middle Eastern and Asian origins. Across the whole country, different dishes are prepared using the following common ingredients:

1. **Corn** is one of the most popular ingredient in the Colombia cuisine, at is the basis for several traditional recipes, including *arepas*, *almojábanas* and *bollos de mazorca* (corn cakes sold on the street in most cities).
2. **Rice**, another fundamental ingredient, it is commonly served with chicken (*arroz con pollo*). Coconut-flavoured rice and sweet rice pudding are also popular.
3. **Beef** is used in popular dishes like *bistek a la criolla*, which is a steak served with a sautéed onion and tomato sauce, and *posta negra*, a steak covered in a sweet, dark sauce.
4. **Cheese** is used to prepare snacks and is also commonly served as *deditos de queso* (cheese fingers).
5. **Cassava**, a root vegetable eaten both sweet and savoury, is for example used in *sancocho*, a meat and vegetable stew.
6. **Potatoes** are used in dishes like the popular *ajiaco soup*, containing three varieties of potatoes.
7. **Plantains** are eaten baked and roasted, sweet and savoury. The most popular use is in the national dish *bandeja paisa*, where plantains are served alongside mincemeat, pork, red beans, rice, chorizo, arepa, avocado, a fried egg and other staples.
8. **Guava**, which is the most popular fruit ingredient. Guava paste is used in everything from sweets, doughnut fillings and plantain pie to snacks like *bocadillo con queso*, where it is served wrapped in plantain leaves and eaten with cheese.
9. **Avocado** is usually served with *ajiaco* and *bandeja paisa*. Many families use them for guacamole and other sauces.
10. **Coconut** is very popular on the Caribbean coast. It is used to prepare cakes, flans and coconut balls (*panelitas de coco*), soups, coconut rice and sauces to top fish and chicken¹¹.

In Colombia there is also a wide variety of alcoholic and non-alcoholic beverages. The most popular are the following:

1. **Aguardiente**, derived from sugarcane and flavoured with aniseed, is considered Colombia's national drink, although it is more popular inland.
2. **Rum**, one of Colombians' favourite alcoholic drink, notably on the Caribbean coast, is usually high quality, and fairly inexpensive.
3. **Beer** is produced nearly everywhere. There is a wide selection of national beers available, mostly lagers, including classics Águila, Pilsen, Costeña and Club Colombia.
4. **Limonada de coco** – prepared with coconut cream, fresh lime juice, ice, and sugar – is the most popular non-alcoholic drink across the country.

¹¹ 10 Key Ingredients in Colombian Cooking, <https://www.colombia.co/en/colombia-culture/gastronomy/10-key-ingredients-colombian-cooking/>

5. **Juices and smoothies** are very popular due to the abundance of fresh fruit the whole year round. An example is *Salpicon*, a smoothie made of diced chunks of papaya, watermelon, mango, banana and *Colombiana* (a Colombian soda).
6. **Coffee** is a way of life in Colombia and is mostly drunk hot, although can be also found in iced versions. Colombians mostly drink coffee to socialise.
7. **Hot chocolate** is also very popular and can be served with cinnamon, made with whole milk and added sugar (*chocolate Santafereño*).¹²

3.3.2.3 Colours

In Colombia, colours are mostly perceived in the same way Europeans do, with some exceptions, as outlined below:

- **orange** represents sexuality and fertility,
- **blue** is the colour of the soap and therefore it is associated with a sense of cleanness,
- **brown** is considered a formal colour.

3.3.2.4 Gift giving

In Colombia, it is appropriate to bring a gift to partners, in occasion of business meetings. Fine wines, imported spirits, expensive chocolates or specialised products unavailable in Colombia usually make good gifts. If giving flowers, lilies, marigolds or other yellow flowers should be avoided, as they are used at funerals. Gifts are not usually opened in front of the person who gave them.

¹² 11 Colombian Drinks You Should Be Sipping On Right Now, <https://blog.amigofoods.com/index.php/colombian-food/colombian-drinks/>

4 Market access and entry

This section provides details on the necessary requirements for entry in to the Colombian market, outlining existing market access restrictions and explaining procedures. A summary of market access and entry is presented in section 4.1, in the form of a SWOT analysis.

4.1 Summary SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ Increasing demand for imported products. ▪ Protection of several EU GI products is ensured under the EU-Andean FTA; GIs can also register in Colombia, in accordance with Decision 486 of 2000; Colombia is also part of the Madrid System. ▪ Authorities place great importance on food safety. ▪ Colombia is a net importer of agri-food products. 	<ul style="list-style-type: none"> ▪ Low per capita consumption of processed and packaged food. ▪ Difficult geography and poor transport infrastructure can make distribution challenging. ▪ Some categories of food and beverages must be registered with the National Institute for Food and Medicine Vigilance to access the Colombian market. ▪ EU is not a major exporter of food and beverages to Colombia.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ Colombia is the third largest economy in Central and South America; it is also a fast-growing market. ▪ Post-peace deal in Colombia is set to generate a period of stability and economic prosperity. ▪ Growing lower and middle income population is stimulating a growth in processed foods. ▪ Access through several commercial hubs, i.e. Bogotá, Medellín, Cali, Barranquilla and Cartagena. ▪ Under the EU-Andean FTA, at the end of the transition period, customs duties will be removed for all processed agri-food products; trade in agricultural products will become more open. 	<ul style="list-style-type: none"> • Multiple FTAs with other countries; and the likelihood of further deals in the future. Direct competition from Southern and Northern American countries, which offers similar products to EU countries. • There are difficulties in enforcing IPR, hence contraband is rather widespread. • High internal transport costs from ports, due to poor infrastructure. • Underdeveloped cold chain in most parts of the country.

4.2 Food and beverage legislation and regulations

4.2.1 Import requirements/restrictions, customs procedures and documentation

Import requirements/restrictions

In Colombia, the import clearance process of food and beverages involves several bodies, including:

- Ministry of Commerce, Industry and Tourism (MINCOMEX)
- Ministry of Agriculture
- National Directorate of Taxes and Customs (DIAN)
- National Institute for Food and Medicine Vigilance (INVIMA)

Exporters must follow some basic steps before shipping their products to Colombia, as outlined below:

- **Product Registration:** most categories of processed food and beverages must be registered with the INVIMA to access the Colombian market. In accordance with Decree 3075/1977, only the following products are not subject to registration: (a) non-transformed chilled and frozen animal-origin food products (e.g. fresh meat), (b) non-transformed natural food products (e.g. fresh F&V), and (c) raw materials for food preparation (e.g. food ingredients).
- **Import Registration:** the exporter must purchase and fill out the Import Registration form, which is submitted to the MINCOMEX. The document includes a complete product description and tariff classification.
- **Inspection:** once MINCOMEX has approved the Import Registration Form, the customs may decide to inspect the merchandise and then authorises the withdrawal of products.
- **Andean Custom Value Declaration** (see picture below): the exporter must fill out this Declaration when the import value of its products exceeds USD 5 000 (i.e. approximately EUR 4 400) FOB.
- **Import Declaration** (see pictures below): in order for a shipment whose import value exceeds USD 1 000 (i.e. approximately EUR 880) to exit Customs, a broker must complete this Declaration.
- **Payment of duties:** the exporter must pay import duties, VAT, surcharges, and other fees.

N.B: All documents shall be preserved for a period of no less than five years.

Andean Custom Value Declaration


REPUBLICA DE COLOMBIA Dirección de Impuestos y Aduanas Nacionales		Declaración Andina del Valor				ANLSICA Autoridad Nacional de Licencias de Importación y Exportación		560					
Espacio reservado para la DIAN					1. Año <input type="text"/>								
					4. Número de formulario 560600000000 0								
					(415)7707212489984(8020)0560600000000 0								
Datos generales	5. Número de Identificación Tributaria (NIT)		6. DV		7. Primer apellido		8. Segundo apellido		9. Primer nombre		10. Otros nombres		
	11. Razón social												
24. Cód. Admón.		25. Tipo declaración Andina del Valor		26. No. Declaración de importación				27. Fecha					
28. Cód. Nivel comercial importador		29. Especifique				30. Cód. Condición Exportador / Proveedor		31. Especifique					
32. Resolución de aduana			33. Año		Mes		Día		34. Código Tipo resolución		35. Especifique:		
36. Cód. Naturaleza de la transacción			37. Cód. Forma de envío										
38. Condiciones de entrega			39. Lugar			40. Cód. país procedencia		41. Factura No.		42. Fecha			
43. Contrato u otro documento			44. No. de contrato u otro documento			45. Año		Mes		Día		46. Valor del contrato u otro documento	
47. Código moneda		48. Tipo de cambio		49. Año		Mes		Día		50. Código moneda		51. Tipo de cambio	
52. Año		Mes		Día									
Item	53. Nombre comercial y características					54. Cód. Estado Mercancía	55. Cantidad	56. Unidad Cial.	57. Precio FOB unitario USD				
1													
					58. Valor FOB total								
59. En la transacción participa un intermediario?		60. Nombre o razón social:				61. Dirección:		62. Ciudad		63. Cód. País		64. Cód. Tipo intermediana	
65. Existe vinculación entre el importador y el proveedor?					66. Ha influido la vinculación en el precio de la mercancía?								
67. El valor de transacción se aproxima a algún valor criterio?					68. Especifique:								
69. Existen restricciones a la cesión o utilización de las mercancías?					70. Especifique:								
71. La venta o el precio dependen de condiciones o de contraprestaciones?					72. Especifique:								
73. Puede determinarse el valor de las condiciones o de las contraprestaciones?					74. Existen pagos indirectos o descuentos retroactivos?								
75. Hay cánones y derechos de licencia (regalías) relativos a mercancías importadas?					76. Especifique:								
77. Existen reversiones del comprador al proveedor?					78. Especifique:								
Determinación del valor			Valor moneda de facturación distinta al dólar		USD		Determinación del valor			Valor moneda de facturación distinta al dólar		USD	
Precio neto según factura			30				Gastos de transporte, manejo y entrega en el exterior hasta el lugar de embarque			101		102	
Pagos indirectos, descuentos retroactivos u otros			31				Gastos de transporte desde el lugar de embarque hasta el lugar de importación			103		104	
Precio pagado o por pagar			33				Gastos de carga, descarga y manipulación			105		106	
Comisiones, corretajes, excepto las comisiones de compra			34		35		Seguro			107		108	
Envases y embalajes			36		37		Total adiciones			109		100	
Prestaciones en materias primas y otros			38		39		Gastos de entrega posteriores a la importación			115		111	
Prestaciones en herramientas, matrices, moldes, etc.			39		41		Gastos de construcción, armado, instalación, montaje, mantenimiento y asistencia técnica, realizados después de la importación.			112		113	
Prestaciones en insumos y otros			40		43		Derechos de aduana y otros impuestos			114		115	
Prestaciones en ingeniería, creación, planos, otros			41		45		Intereses			116		117	
Cánones y derechos de licencia (regalías)			42		47		Otros gastos			118		119	
Producto de la reventa, cesión o utilización posterior, que revierta al vendedor de manera directa o indirecta			43		49		Total deducciones			120		121	
Gastos de entrega hasta el lugar de importación			44		50		Valor de transacción declarado			122		123	
			20				122. Algunos de los importes declarados en las casillas 97 y 99 tiene carácter estimado o provisional?						
Firma declarante													

Original: Declarante

2006416000001

PRECIO MAXIMO DE VENTA AL PUBLICO \$6.000

Import declaration



DIAN
DIAGRAMA DE INGRESOS ATRIBUTOS

Declaración de Importación

Privada

500

1. Año

4. Número de formulario

**más Colombia
MENOS Contrabando**

Lea cuidadosamente las instrucciones

5. Número de Identificación Tributaria (NIT)	6. DV	11. Apellidos y nombres o razón social
13. Dirección		15. Teléfono
12. Cód. Dirección (Ciudad)		16. Cód. Dpto.
17. Cód. Ciudad/Municipio		

24. Número de Identificación Tributaria (NIT)	25. DV	26. Razón social del declarante autorizado
29. Número documento de identificación		30. Apellidos y nombres
27. Tipo usuario		28. Cód. Usuario

31. Clase importador	32. Tipo declaración	33. Cód.	34. No. Formulario anterior	35. Año	Mes	Día	36. Cód. Direc. Seccional	37. Declaración de exportación	38. Año	Mes	Día	39. Cód. Dirección seccional
40. Cód. Lugar ingreso de las mercancías		41. Cód. Depósito		42. Manifiesto de carga No.		43. Fecha de llegada AAAA MM DD		44. Documento de transporte No.		45. Año Mes Día		
46. Nombre exportador o proveedor en el exterior										47. Ciudad		48. Cód. País exportador
49. Dirección exportador o proveedor en el exterior										50. E-mail		

51. No. de factura	52. Año	Mes	Día	53. Cód. País procedencia	54. Cód. Modo de transporte	55. Código de bandera	56. Cód. sistema mercadería	57. Empresa transportadora	58. Tasa de cambio \$ c/v.
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S	59. Subpartida arancelaria	60. Código complementario	61. Código suplementario	62. Cód. Modalidad	63. No. Cuentas Proceso	64. Valor cuota USD	65. Periodicidad del pago de la cuota	66. Cód. País origen	67. Cód. Acuerdo
68. Forma de pago de la importación		69. Tipo de importación		70. Cód. País compra		71. Peso bruto kgs. decim.		72. Peso neto kgs. decim.	
73. Cód. País origen		74. No. Bultos		75. Subpartes		76. Cód. Unidad física		77. Cantidad decim.	

78. Valor FOB USD	79. Valor fletes USD	Concepto	%	Peso	Total liquidado pesos (\$)	Total a pagar con esta declaración pesos (\$)	Total liquidado dólares (USD)
80. Valor seguros USD	81. Valor otros gastos USD	Arancel	93		94	95	96
		I. V. A.	97		99	100	101
82. Sumatoria de fletes, seguros y otros gastos USD	83. Ajuste valor USD	Salvaguarda	102		104	105	103
		Derechos	107	100	109	110	111
		Impuestos	112	113	114	115	116
		Retención	117	118	119	120	
		Rescate	121	122	123	124	
87. Cód. oficina	88. Año	89. Programa No.	90. Cód. Interno del producto		Total 125		126

91. Descripción de las mercancías (NO incluya la descripción de las mercancías a reportar con lo sellado en el arancel de aduanas en la subpartida arancelaria - Incluya marcas, señales y otras). Si el campo es insuficiente, continúe al reverso de este formulario.

127. Valor pagos anteriores	128. Recibo oficial de pago anterior No.	129. Fecha AAAA MM DD
131. Espacio reservado DIAN - Activación aduanera		132. No. Aceptación declaración
		133. Fecha AAAA MM DD
134. Levante No.	135. Fecha AAAA MM DD	Firma funcionario responsable
		136. Nombre
		137. C.C. No.

<p>Firma declarante</p> <div style="border: 1px solid black; padding: 5px; text-align: center;"> <p>997. Espacio exclusivo para el sello de la entidad recaudadora (Fecha efectiva de la transacción)</p> <p>Coloque el timbre de la máquina registradora al dorso de este formulario</p> </div>	<p>998. Pago total \$ <input style="width: 100%;" type="text"/></p> <p>999. Espacio para el adhesivo de la entidad recaudadora (Número del adhesivo)</p>
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2012409

After an import declaration has been made and duties have been paid, the exporter can ship its products to Colombia. Exporters are expected to meet some requirements for import, which can be split into: (1) general requirements, which apply to all imports (

Table 4-1); and (2) specific requirement for food and beverages imports (Table 4-2).

Single Window for Foreign Trade (VUCE)	
<p>The Single Window for Foreign Trade (VUCE) is an electronic tool which allows the processing of certifications required by the Colombian government to carry out import operations. More specifically, the following operations can be carried out through this system:</p> <ul style="list-style-type: none"> • Submission of the Manifest • Preliminary Import Licence (<i>when requested</i>) • Preliminary Import Registration (<i>when requested</i>) 	

Table 4-1: General requirements for exporting goods (including F&B) to Colombia

Name	Description	To be prepared by	Language
Air Waybill	A document containing the details of the transportation of products by air and proving the transport contract between the consignor and the carrier's company. One Air Waybill may be used for the multiple transshipment of products.	Carrier (or his agent)	Usually EN
Bill of Lading	A document containing the details of the international transportation of products by sea.	Carrier (or his agent)	Usually EN
<u>Manifest</u>	A document notifying the authorities of the arrival of a vessel/an aircraft and summarising the goods loaded therein. The document must be submitted via the Single Window of Foreign Trade (VUCE).	Freight forwarder (or his agent)	ES
Packing List	A document containing the details of the shipment, including content of the packages, description of the goods, marks and numbers.	Exporter	ES/EN
Pro Forma Invoice	A document containing the details of the transaction made out prior to the proper invoicing. <u>It may be required</u> by the importer/competent authorities of the importing country. The Pro Forma Invoice usually contains the same information as the final Commercial Invoice but may be more concise.	Exporter	ES
Commercial Invoice	A document containing the details of the transaction.	Exporter	ES
<u>Certificate of Non-Preferential Origin</u>	A document certifying the non-preferential origin of the goods to be imported. In case of F&B, the certificate is to be legalised by the Colombian embassy of the country of export.	Exporter	ES/EN
<u>Proof of Preferential Origin</u>	A document confirming the preferential origin of the goods to be imported. It is required if preferential treatment under an FTA or arrangement is claimed.	Exporter	ES/EN

Source: European Commission Market Access Database

Table 4-2: Specific requirements for exporting F&B to Colombia

Name	Description	Processing fee	Processing time	Period of validity	Applicable to*
Application Sheet for Phytosanitary Requirements	A document (to be completed in Spanish) used to apply for phytosanitary requirements for plants and plant products.	Not stipulated	4-10 days depending on the commodity	90 days (valid for a single importation)	F&V; Pet food
Authorisation of Foreign Foodstuffs Producers	A document certifying that producers of foodstuffs have been authorised by the competent authority in the country of export and comply with the principles of HACCP. The authorisation may be prepared in any language. However, a translation into Spanish may be required.	Depending on the country of origin	Depending on the country of origin	Depending on the country of origin	Fresh meat; Processed meat; Beer; Dairy; F&V; Olive oil; Pasta; Confectionary; Jam; Cereal bars; Biscuits; Baby food
Certificate of Analysis	A document (to be prepared in Spanish) certifying that microbiological and physical/chemical tests have been carried out by an appropriate laboratory in the country of export.	Depending on the country of origin	Depending on the country of origin	Depending on the country of origin	Fresh meat; Processed meat; Beer; Dairy; F&V; Olive oil; Pasta; Confectionary; Jam; Cereal bars; Biscuits; Baby food
Certificate of Fumigation	A document certifying that fumigation treatment has been conducted in accordance with the Colombian quarantine requirements. The certificate is to be prepared by the manufacturer in Spanish, or in English with a translation into Spanish.	Depending on the country of origin	Depending on the country of origin	Depending on the country of origin	F&V; Pasta; Baby food
Import Approval for Fish and Fish Products	A document approving the importation of fish and fish products.	Depending on annually imported amount	2 days	5 years	Pet food
Patent for a New Plant Variety	A document certifying the novelty as well as the distinctness, uniformity and stability (DUS) of a new plant variety and protecting breeders' rights.	1 414 366 COP + small additional costs	Maximum 60 days	25 for vines and fruit trees; 20 years for other species	Only required if a new plant variety
Permit to Import Species not Subject to CITES for Commercial Purposes	A document permitting the actual importation of species of wild fauna and flora not subject to Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES). The application is to be completed in Spanish.		5 working days	6 months	Wildlife species not subject to CITES

Name	Description	Processing fee	Processing time	Period of validity	Applicable to*
Permit to Import Species Subject to CITES	A document permitting the actual importation of species of wild fauna and flora subject to the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES). The application is to be completed in Spanish.		15 working days	6 months	Products subject to CITES
Phytosanitary Certificate	A document confirming that plants and plant products conform with the current Colombian phytosanitary regulations. The Certificate may be prepared in any language. A translation into Spanish may, however, be required.	Depending on the country of origin	Depending on the country of origin	Depending on the country of origin	F&V; Pet food
Phytosanitary Import Permit	A document permitting the actual importation of plants and plant products. The application is to be prepared as a letter of request in Spanish.	54 000 COP	4-10 working days	90 days	F&V; Pet food
Preliminary Import Licence	A document proving that its bearer is authorised to import goods subject to non-automatic import licensing by the MINCIT. The application is to be completed in Spanish. The document must be submitted via the Single Window of Foreign Trade (VUCE).	Stipulated by the MINCIT	1 day from the moment approvals have been received	Generally, 6 months	Fresh meat; Confectionary
Preliminary Import Registration	A Preliminary Import Registration with the MINCIT is mandatory for importations of all goods for which preliminary approvals or authorisations or other prerequisites from government authorities are required. The registration is done online via the Single Window of Foreign Trade (VUCE).	Up to 30 000 COP per 1 800 items, depending on the invoiced value of the good	12 hours from the moment all approvals have been received	Generally, 6 months	Fresh meat; Processed meat; Wine; Spirits; Beer; Dairy products; F&V; Olive oil; Pasta; Pet food; Jam; Cereal bars; Biscuits; Baby food
Registration of Importers of Veterinary Products and Genetic Material of Animal Origin	A document confirming that importers of veterinary products, and genetic material of animal origin have been registered with the Colombian Agricultural Institute (ICA). The application is to be completed in Spanish.	723 113 COP	45 days	Unlimited, as long as all data provided remains unchanged	Processed meat; Pet food
Sanitary Registration of Alcoholic Beverages	A document certifying that alcoholic beverages to be imported are registered with the Ministry of Health and Social Protection (MINSALUD).	3 071 759 – 3 671 315 COP	5 days	10 years	Wine; Spirits

Name	Description	Processing fee	Processing time	Period of validity	Applicable to*
	The application is to be completed in Spanish.				
Sanitary Registration of Foodstuffs	A document certifying that foodstuffs to be imported are registered with MINSALUD. The application for sanitary registration consists of two application forms. The first form provides with general information on the applicant. In the second form, information required for the sanitary registration must be provided.	Varies depending on the risk associated with the product to be imported	Decision is immediate	10 years	Fresh meat; Processed meat; Beer; Dairy products; F&V; Olive oil; Pasta; Confectionary; Jam; Cereal bars; Biscuits; Baby food
Veterinary Health Certificate for Animal Products	A document confirming that products of animal origin conform with the current Colombian veterinary legislation. The certificate may be prepared in any language. A translation into Spanish may, however, be required.	Depending on the country of origin	Depending on the country of origin	Depending on the country of origin	Fresh meat; Processed meat; Dairy; Pet food; Baby food
Zoosanitary Import Permit	A document permitting the actual importation of live animals and products of animal origin. The application is to be completed electronically in Spanish.	228 960 – 226 461 COP + inspection costs	Generally, 10 working days	90 days (valid for a single importation)	Fresh meat; Processed meat; Dairy; Pet food; Baby food

**In several cases only a few products within a certain food category are affected by those requirements. Further details are provided within each Market Snapshot, in section 5.*

Source: European Commission Market Access Database.

4.2.2 Food safety and other food certification requirements

In accordance with Article 34 of Congressional Law 1122 of 2007, the bodies responsible for regulating food safety in Colombia are the following:

- Ministry of Health and Social Protection (*MINSALUD*)
- National Institute for the Surveillance of Food and Medicines (*INVIMA*)
- Ministry of Agriculture and Rural Development (*MINAGRICULTURA*)
- Colombian Institute for Agriculture and Livestock (*ICA*)

The objective pursued by these bodies, in the matter of food safety, is to protect consumers from contaminated, adulterated and fraudulent products. To this end, the Colombian government has developed a set of guidelines for the production, transport, storage and marketing of agri-food products, as well as hygienic standards and quality of raw materials used to produce agri-food products. The key piece of relevant legislation dealing with food products and human health in Colombia is **Law 9 of 1979**

(Food Sanitary Measures from handling until consumption)¹³. Title V of the above-mentioned Law provides for specific rules concerning foods and beverages¹⁴, including imported products. **Articles 300-303 specifically concern imported products** (see box below).

Law 9 of 1979 on imports of food products

Article 300. *All products [...] that are imported into the country [i.e. Colombia] must bear a country of origin certificate, issued by the sanitary authority of the country of production, authenticated before the consulate of Colombia or the closest partner nation, in which, in addition, the suitability for human consumption must be certified.*

Article 301. *The Ministry of Health shall establish, together with the Ministry of Agriculture, the requirements imported or exported products [...] must comply with and shall supervise its strict observance.*

Article 302. *Imported and exported food and beverages shall comply with the provisions of the present Law [i.e. Law 9/1979] and its regulations on labels and advertisement.*

Article 303. *The ports where imported and export foods and beverages arrive must have storage areas in adequate sanitary conditions, in order to ensure the products' conservation.*

Paragraph. *The Ministry of Health or the entity that it delegates will control, in coordination with the Ministry of Agriculture, the observance of the provisions established in this article.*

Translation by Agra CEAS.

All decrees and regulations produced since then are based on Law 9/1979. The most relevant for food and beverages are outlined below:

- **Decree 3075 of 1997 (Activities that generate risk factors from manufacturing to commercialisation).** This Decree determines, amongst others, the categories of products that must register with INVIMA before they are imported into Colombia (see section 4.2.1).
- **Decree 4149 of 2004 (Regulation of some procedures and foreign trade procedures).** This Decree lays down rules for the use of the Single Window for Foreign Trade (VUCE), i.e. a computer tool for the electronic processing of import documents, amongst others (see section 4.1).
- **Resolution 5109 of 2005 (Regulation in terms of labels or labels requirements).** Further details are provided in section 4.2.3.
- **Resolution 1506 of 2011 (Requirements for labeling or labels regarding additives).** Further details are provided in section 4.2.3.
- **Resolution 2674 of 2013 (Health requirements that must have the natural or legal persons who exercise the manufacture of these).** Under this Regulation, products can be registered as high-risk, medium-risk, or low-risk products, based on the risk they pose to public health. Registration

¹³ <https://www.funcionpublica.gov.co/eva/gestornormativo/norma.php?i=1177>

¹⁴ The category "beverages" includes alcoholic and non-alcoholic beverages, as well as stimulants, as determined by the Ministry of Health.

has a fixed period of validity, which is: (a) 5 years for high-risk products, (b) 7 years for medium-risk products, and (c) 10 years for low-risk products.

- **Decree 539 of 2014, amended in 2017 (Technical regulations on health requirements that must be met when importing and exporting food).** This Decree introduced new requirements for high-risk food products, including plant registration with INVIMA and the inspection of facilities prior export to Colombia.
- **Resolution 719 of 2015 (classification of food for human consumption according to public health risk).** This Resolution categorises food products for human consumption on the basis of the risk they pose to public health.

4.2.3 Labelling Requirements

As already specified in section 4.2.2, two pieces of legislation lay down labelling rules, in Colombia, which are:

- **Regulation in terms of labels or labels requirements (Resolution 5109 of 2005).**
- **Requirements for labelling or labels regarding additives (Resolution 1506 of 2011).**

Under Resolutions 5109/2005 and 1506/2011, foodstuff and food additives labels must include the following information:

- name of the product
- list of ingredients
- information on the net weight: by volume for liquid foodstuffs, weight for solids, weight or volume for semi-solid or viscous foodstuffs
- company name
- address details of the manufacturer
- contact details of the importer
- country of origin of processed food (*please note that frozen vegetables are not classified as processed food*)
- expiry date
- information on the shelf life
- identification of the lot
- instructions for use.

Furthermore, irradiated food additives must be labelled accordingly.

Furthermore, [Decree 1686 of 2012](#) requires that alcoholic beverages labels contain the following information:

- Alcohol strength in degrees or vol. %
- Net contents in metric units
- Name and brand of product as registered with INVIMA
- Name and address of producer or packer
- Name and address of importer

- INVIMA Register number
- Date of expiry for beer and non-wine specialty beverages

As within the EU, expressions or images suggesting medicinal or nutritional properties are prohibited¹⁵.

The labels of beverages of 2.5% ABV or higher must display one of the following warning statements against excessive drinking:

- “Excessive use of alcohol is harmful to health”. This warning must take up, at a minimum, a tenth of the label’s area, be placed on the front, and be located at the bottom in easily readable font contrasting with the background.
- “It is prohibited to sell intoxicating beverages to minors.”

Moreover, the Colombian government plans to introduce **labelling regulations on the content of sugar and fat in packaged food**. However, the proposal is at an early stage of development.

Further labelling requirements are described in the boxes below.

Nutritional labelling requirements

In accordance with [Resolution 333 of 2011](#), all packaged food, including imported products, must bear a nutritional label in Spanish. A sticker may be used, provided it clearly displays the required information. The resolution, however, does not cover nutritional labelling for products destined for infant children, which is covered by Resolution 11488 of 1984. Whenever there is an issue regarding nutrition values in food products not considered in resolution 333, Colombia follows Codex Alimentarius guidance¹⁶.

The mandatory information that nutritional labels must contain is the following: Energy content (calories), Total fats (saturated and trans fats), Cholesterol, Sodium, Total carbohydrates (dietary fibres and sugars), Protein, Vitamin A, Vitamin C, Iron, and Calcium. Furthermore, the following information can be provided on a voluntary basis: Calories of saturated fats; Monounsaturated fat; Polyunsaturated fat; Potassium; Soluble and Insoluble Fibres; Polyhydric alcohols; Other vitamins; Other minerals.

MINSALUD published a guide for food producers to better understand the nutritional labelling requirements. The guide can be retrieved on the MINSALUD website, at the following link:
<https://www.minsalud.gov.co/sites/rid/Lists/BibliotecaDigital/RIDE/VS/PP/SNA/Rotulado-nutricional-alimentos-ensavados.pdf>

Health claims

¹⁵ IARD, Beverage Alcohol Labeling Requirements, <http://www.iard.org/resources/beverage-alcohol-labeling-requirements/>

¹⁶ GAIN Report: Colombia Food and Agricultural Import Regulations and Standards, <https://gain.fas.usda.gov/Recent%20GAIN%20Publications/Food%20and%20Agricultural%20Import%20Regulation%20and%20Standards%20-%20Narrative%20Bogota%20Colombia%2012-28-2017.pdf>

Health claims on labels can appear in respect of the provisions lay down in [Chapter VI of Resolution 333/2011](#). According to Article 24, all health claims must be approved by INVIMA. Article 20 sets the generic requirements for health claims on food packages and describes the cases in which the latter are forbidden. In general, health claims can be displayed on the label, provided they **are based on scientific evidence and do not mislead consumers**. Articles 21, 22 and 23 list all types of possible health claims, distinguishing between three main categories, which are:

1. **Declaration of the nutrients' role** (*Declaración de función de los nutrientes*): statements of properties that describe the physiological function of the nutrient for the growth, as well as the development and the normal functions of the organism.
2. **Declaration of properties of other functions** (*Declaración de propiedades de otras funciones*): statements indicating the positive contribution of a certain product's consumption to health.
3. **Declaration of disease risk reduction properties** (*Declaraciones de propiedades de reducción de riesgos de enfermedad*): statements relating the consumption of a product to the reduction of disease risk or a health condition.

Genetically modified organisms (GMOs)

Resolution 4254/2011, related to the labeling or labeling of foods derived from GMOs, indicates that the labels of foodstuffs containing or derived from GMOs must specify the nutritional value with a clear identification of the GMO content. On top of that, labels must show guidelines for the preparation of genetically modified foodstuffs and the name of the introduced genetically modified substance.

In order to be imported into and marketed in Colombia, agri-food products consisting of or derived from GMOs or LMOs must accordingly be labelled with "GMO". The label text must be clearly printed or affixed on a bright background.

Country of origin labelling

Most imported products, e.g. pre-packaged foodstuffs are requested to indicate origin on the label. For consumer products, the labelling requirement depends on the appropriate technical regulation covering different groups of products. The origin of the product can be indicated through terms such as "Grown in", "Made in" or "Product of". Depending on the product group, further information on country of origin labelling requirements may also be obtained from the responsible authority. In case of food products, the **Colombian Agricultural and Livestock Institute may be reached for consultation**. The country of origin indicated on labels should correspond to the origin stated on the commercial documents. Any indication of a country on the product itself may be valued as a declaration of origin.

4.2.4 Protection of intellectual property rights, including geographical Indications (GIs)

IPR protection framework

Trademarks in Colombia are protected under the [Andean Decision 486 of 2000](#), which sets out the framework for the trademark registration. Additionally, Colombia is a party to the Madrid System, which offers a trademark owner the possibility to have the trademark protected in several countries by filing one application with their own national trademark office.

In accordance with Chapter II of Decision 486, the registration of a trademark in Colombia follows the procedures described below:

- The operator files a trademark application with the Superintendent of Industry and Commerce (SIC). Applicants without a domicile in Colombia must appoint a legal representative who could be either a Colombian or a foreigner attorney, who is registered before the *Consejo Superior de la Judicatura*, i.e. the national register for attorneys.
- The SIC conducts a review of trademark applications in accordance with Decision 486;
- SIC publishes the application for thirty days, where third parties with a legitimate interest may file an opposition to the trademark application.

How do I register a trademark?

In accordance with Article 134 of Decision 486, the application to register a trademark must include the following documents:

- a) the request for registration of a mark;
- b) a reproduction of the mark in the case of a word mark featuring graphic elements,
- c) shapes or colour or a figurative, composite or three-dimensional mark with or without colour;
- d) proof of payment of the prescribed fee;
- e) where applicable, the certificate of registration of the country of origin, issued by the authority that granted it.

*Multiple-class Trademark applications and registrations are possible in Colombia. Hence, one Trademark application can protect as many goods and services' classes as the applicant wishes to protect. The fee to register a Trademark for **one class** is **EUR 250**. **Each extra class** amounts to **EUR 125**. There is, however, a **25% fee discount for SMEs that are legally incorporated in Colombia**.*

The trademark registration is **valid for ten years**, with **possibility of renewal for successive 10-year periods**.

Under Chapter I of Decision 486, in order to be registered, the sign must be capable of being graphically represented. The Andean legislation also establishes that Trademarks shall not protect signs with the characteristics outlined below:

- They lack distinctiveness;
- They consist of the everyday shape of the associated goods,
- They consist of general statements used in the course of trade (e.g. the best, the most valuable);
- They may mislead the public or the concerned business sector.

Against this background, physical contraband tends to undermine the government efforts to promote IPR and raise public awareness. Colombia joined the World Trade Organisation (WTO) in 1994 and has signed Free Trade Agreements with the EU that came into effect in 2012, resulting in a higher level of harmonisation with EU IPR protection standards. Although IP Protection has been improved during recent years in areas such as Appellations of Origin, there are still some difficulties in enforcing IPRs – mainly due

to lack of an IP culture among users and authorities.¹⁷¹⁸ In 2016, the EU has indeed identified three cases of usurpation of EU Geographical Indications, concerning three cheeses: Italian parmigiano reggiano and gorgonzola, as well as Greek feta. In 2017, Colombia launched an investigation into this matter and results are expected by the end of 2019.

Colombia's Geographical Indication (GI) protection system

Colombia distinguishes between:

- An **Appellation of Origin (AO)** is the name of a country, region or place, which is used to identify a product originating therein when its quality, reputation or other characteristics are exclusively or essentially due to the geographical environment in which it is produced, including both natural and human factors, under article 201 of Decision 486.
- An **Indication of Source** (*indicación de procedencia*) is a name, expression, image or sign that designates or evokes a particular country, region, locality or place (e.g. Made in Italy).

The declaration of AO should be made *ex officio* or upon request of the parties. It can be requested either by a person or a legal entity such as an association of producers, States or Regions directly engaged with the production or processing of the product protected by the appellation of origin. Such a declaration should be made before the SIC and has a cost of **EUR 165**.

4.2.5 Relevant authorities for IPR and GI protection and further contacts

Superintendencia of Industry and Commerce (SIC)
Ministry of Industry, Commerce and Tourism
Deals with Industrial Property that protects signs (including trademarks)
 Carrera 13 No. 27-00 Pisos Mezanine, 5 y 10 Bogotá
 ☎ (571) 587 0051
 ✉ superintendente@sic.gov.co; info@sic.gov.co; contactenos@sic.gov.co
 🌐 www.sic.gov.co

4.3 International trade

4.3.1 Colombia and foreign trade

The Ministry of Trade, Industry and Tourism, notably the Vice-Ministry of External Trade, has the primary responsibility for trade policy in Colombia. Colombian trade policy has historically been aimed at identifying new and innovative initiatives to boost exports, taking advantage of trade agreements and

¹⁷ Export.gov: Colombia - Protecting Intellectual Property, <https://www.export.gov/article?id=Colombia-Protecting-Intellectual-Property>

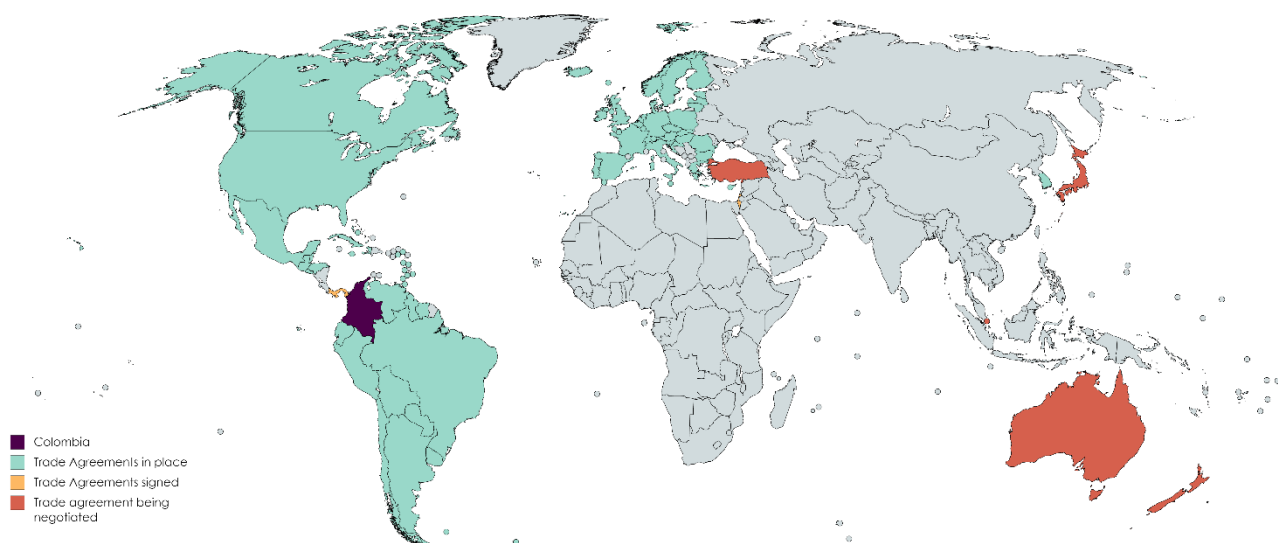
¹⁸ Latin America IPR SME Helpdesk IP Factsheet: Colombia, <http://www.latinamerica-ipr-helpdesk.eu/content/colombia-ip-country-factsheet>

access to new markets¹⁹. In this respect, Colombia has been a member of GATT since 1981 and became a member of the WTO in 1995. More recently, as a trade-oriented country, Colombia has been generally in favour of bilateral and multilateral trade liberalisation. However, the new President decided that Colombia will not get into negotiations to sign new Free Trade Agreements; the main interest is indeed to take full advantage of the already existing deals. Colombia will however honour the agreements that are already under negotiations (see section 4.3.2).

4.3.2 Key trade agreements, present and future

Colombia has historically been in favour of trade liberalisation in recent times, as demonstrated by the several agreements concluded over the past twenty years (see Table 4-3). Most agreements into force involve Southern and Northern American countries (Figure 4-1). Yet, in recent years, the government strategy has been to approach countries in the Asian-Pacific region for trade purposes.

Figure 4-1: Colombia's trade agreements with third countries/regions



Source: Agra CEAS; designed with mapchart.net

Table 4-3: Chronological list of Colombia's trade/economic agreements with third countries/regions

Partner/s	Type of agreement	Entry into force
Andean Community	Free Trade Agreement	1969
Chile	Free Trade Agreement	1994
Caribbean Community	Partial Agreement on Trade and Economic Cooperation	1995
Mexico	Free Trade Agreement	1995
MERCOSUR	Economic Complementarity Agreement	2005, updated in 2017
US	Trade Promotion Agreement	2007

¹⁹ Mincomercio: Viceministerio de Comercio Exterior, <http://www.mincit.gov.co/mincomercioexterior/viceministerio>

Partner/s	Type of agreement	Entry into force
Cuba	Economic Complementarity Agreement	2008
Canada	Trade Promotion Agreement	2009
El Salvador, Guatemala, Honduras	Free Trade Agreement	2009-2010
EFTA	Free Trade Agreement	2010
Venezuela	Partial Economic Agreement	2012
Pacific Alliance	Trade Bloc	2012
EU and Peru	Trade Agreement	2014
Costa Rica	Free Trade Agreement	2016
Korea	Free Trade Agreement	2016
Israel	Free Trade Agreement	Not yet – but ratified in 2017
Panama	Free Trade Agreement	Not yet – but negotiations were finalised in 2013

Source: Agra CEAS based on MINCOMERCIO: Acuerdos TLC Colombia, <http://www.tlc.gov.co/acuerdos/vigente>.

In the future, Colombia is expected to enter further trade agreements, mainly, but not exclusively with countries of the Asia-Pacific region. The trade agreements that are currently under negotiations are the following:

- **Japan:** the negotiations for an Economic Partnership Agreement with Japan began end of 2012, as the latter is a country with which Colombia has considerably strengthened its commercial relations in the last decade.²⁰ However, negotiations stopped resulting from dead-locks due to market access issues. In the long term, negotiations could be revived, but the Colombian government hasn't given any indications about that possibility.
- **Turkey:** negotiations for an FTA with Turkey began in 2011 and were then suspended in 2012, as Turkey did not submit tariff reduction lists and did not present a proposal on agricultural, which is a key issue for Colombia.²¹
- **Pacific Alliance:** in occasion of the XII Summit of the Pacific Alliance, on June 2017, member states of the Pacific Alliance announced the beginning of negotiations aimed at granting Australia, Canada, New Zealand and Singapore, which are currently associate members, the status of full members.²²

²⁰ Acuerdo de Asociación Económica entre Colombia y Japón, <http://www.tlc.gov.co/acuerdos/negociaciones-en-curso/japon>

²¹ TLC con Turquía asusta a empresarios colombianos, <https://www.bilaterals.org/?tlic-con-turquia-asusta-a>

²² Acuerdo Comercial en el Marco de Alianza del Pacifico con los Candidatos a Estados Asociados, <http://www.tlc.gov.co/acuerdos/negociaciones-en-curso/alianza-del-pacifico>

4.3.3 EU-Andean Trade Agreement

Despite not being one of the top destinations of EU exported agri-food products²³, the Colombian market may provide new economic opportunities for EU operators, through the Andean Trade Agreement²⁴.

The EU has a comprehensive Trade Agreement with Colombia and Peru, which has been **provisionally applied**, with Peru since 1 March 2013 and **with Colombia since 1 August 2013**. On 1 January 2017, also Ecuador joined the deal. The agreement gradually opens up markets on both sides and increases the stability and predictability of the trade and investment environment.

The agreement opened up markets for products traded between the EU, Colombia and Peru. At the end of the transition period, there will be no customs duties at all on industrial and fisheries products and **trade in agricultural products will become considerably more open**. The European Commission estimated that exporters could save as much as €500 million annually in tariffs alone.

The main benefits of the trade agreement for food and beverage operators include:

- opening new markets for EU products;
- better conditions for trade through new rules on non-tariff barriers, competition, transparency and intellectual property rights;
- a more stable and predictable environment for businesses with a bilateral dispute settlement mechanism and a mediation system for non-tariff barriers;
- arrangements for cooperation on competitiveness, innovation, production modernisation, trade facilitation and technology transfer;

In terms of market access, the European Union will have **preferences and greater access to the Colombian market for dairy products, hams, liqueurs (whiskey, wines and vodka), among others**. For other products, including **olive oil**, Colombia offered **free and immediate access to EU exports**. Further details concerning the tariff changes under the EU-Andean Trade Agreement are analysed in the Market Snapshot specific sections.

- **Protection of geographical indications (GIs):** 33 agricultural and foodstuff products as well as 82 alcoholic beverages are recognised as GIs under the FTA. The full list of products registered as GIs in Colombia is reported in section 9. Examples include:
 1. Alcoholic beverages: *Irish whisky, Asti wine, Ouzo, Polska Wódka, Vinho Verde, Bordeaux wine, Rioja wine, Münchener Bier.*
 2. Dairy: *Idiazábal, Roquefort, Feta, Parmigiano Reggiano.*
 3. Olive oil: *Priego de Córdoba, Huile d'olive de Haute-Provence.*

²³ In the 2018 ranking, Colombia was the 50th main EU agri-food partner.

²⁴ AGRI-FOOD TRADE STATISTICAL FACTSHEET, European Union – Colombia, https://ec.europa.eu/agriculture/sites/agriculture/files/trade-analysis/statistics/outside-eu/countries/agrifood-colombia_en.pdf

Import duties and taxes for the export of food to Colombia can be consulted here:
http://madb.europa.eu/madb/datasetPreviewFormATpubli.htm?datacat_id=AT&from=publi

4.3.4 WTO disputes and other trade barriers

Colombia is currently involved in four WTO disputes, two of them relate to the food and beverage sector, as outlined below:

- **Discriminatory alcohol monopoly practices:** Since 2016, **unequal treatment of imported beers** has been reported from several departments which adopted discriminatory provisions against imported beers through local legislation acts.
- **Ban on imports of live bovine animals and bovine products:** in the Andean Community Resolution 1587 (which entered into force in May 2013), banned imports on Bovine Spongiform Encephalopathy (BSE) of several products such as: live bovine animals, bovine products and by-products. Concentrated meat containing meat/blood/bone meal, bovine meat, bone meal and mammalian offal meal or food additives that contain ruminant proteins for feed animal use from the countries concerned and with different status of negligible risk, are also banned.

Furthermore, it was recently announced that the EU will file a complaint at the WTO against Colombia over **duties imposed on imports of frozen potato fries** from Belgium, the Netherlands and Germany. Colombia imposed anti-dumping duties of up to 8% end of 2018 due to prices considered to be artificially low.²⁵

An up to date list of trade barriers can be consulted here:
https://madb.europa.eu/madb/barriers_result.htm?isSps=false&countries=CO

4.3.5 Summary of key trade barriers

Access to the Colombian market can be complex, despite a part of the procedure being entirely digitalised through the Single Window for Foreign Trade (VUCE) tool, as outlined in section 4.2.1. Food safety and labelling legislation are relatively strict; on most imported articles the names of products/contents, warnings, dates of manufacture, expiry dates and the country of origin must be indicated. In addition, specific labelling requirements apply to certain products (see section 4.2.3). The large number of certifications requested to import some products, and the long time needed to obtain those certificates, may also make the procedure lengthy and burdensome, particularly for SMEs. Furthermore, despite the government effort to protect IPRs, difficulties in the enforcement of current legislation may pose a challenge to EU producers of quality goods, as described in detail in section 4.2.4.

However, the EU-Andean Trade Agreement is provisionally applied in Colombia since 2014. As a result, several food and beverage exports to Colombia are no longer subject to tariffs. Tariffs on remaining goods

²⁵ EU to challenge Colombia at WTO to protect Belgian fries, <https://www.reuters.com/article/us-eu-colombia-wto/eu-to-challenge-colombia-at-wto-to-protect-belgian-fries-idUSKBN1WT1IF>

will be phased out over the years. The Trade Agreement also guarantees protection to several EU geographical indications. The deal is therefore expected to significantly boost EU exports to Colombia, also for key eu food and beverage products, such as olive oil, cheese, hams, and liqueurs (see section 4.3.3).

4.4 Operating in the Colombian food and beverage market

4.4.1 Logistical services and transportation infrastructure

Logistical services and transportation of goods into the country is primarily based on maritime, as majority of products enter the market through numerous ports located in the Western part of Colombia. In general terms, the transportation infrastructure inland (which is based mainly on road freight) is still being under construction, with various national projects and initiatives put in place²⁶. Currently, the major emphasis has been put on further development of efficient network of roads within the country.

Shipping

As mentioned above, transport into the Colombian market relies heavily on maritime transport. Colombia has well developed network of ports, located predominatly in the Western parts of the country. Such location secures strategic connection point between North and South America as well as efficient global connectivity. The biggest ports include Buenaventura, Cartagena and Santa Marta. Figure 4-2 presents major ports and shipping terminals in Colombia; some smaller ports are also shown.

²⁶ El desarrollo de la infraestructura en Colombia ; <https://www.legiscomex.com/Documentos/DESARROLLO-INFRAESTRUCTURA-COLOMBIA-RCI285>

Figure 4-2: Major ports and terminals in Colombia

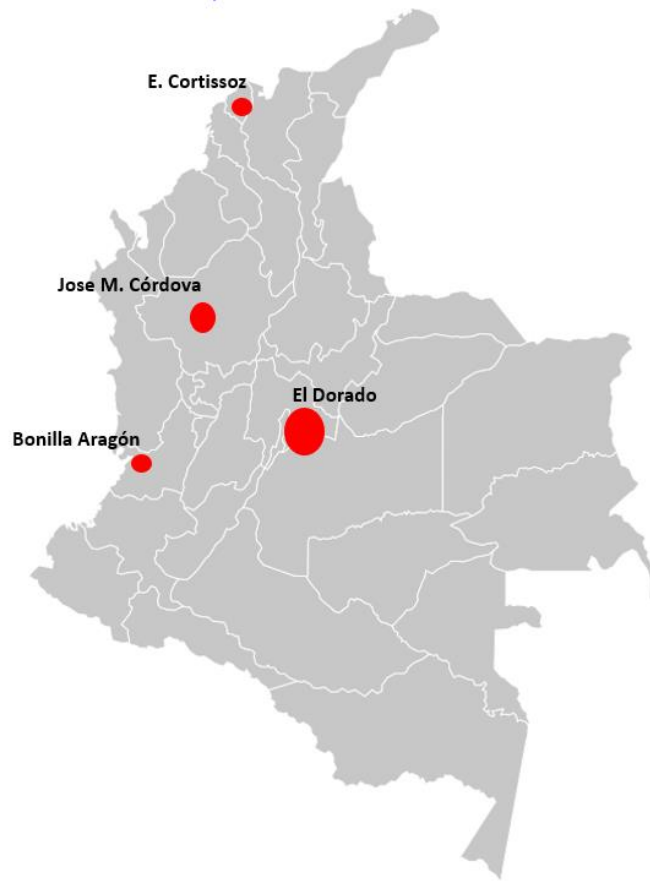
Source: Agra CEAS based on Colombia Trade and World Port Source

Air freight

Colombian aviation infrastructure comprises several airports located in the North and West of Colombia, however El Dorado airport is by far the most important in the network, both on the freight and civil transportation level. The value of goods transported via air has been on continuous rise since early 2010s²⁷. Other crucial points for air freight in Colombia are depicted in Figure 2-1.

²⁷ Infraestructura logística y transporte de carga en Colombia; https://www.colombitrade.com.co/sites/default/files/presentacion_logistica_de_colombia_2016.pdf

Figure 4-3: Main International airports in Colombia

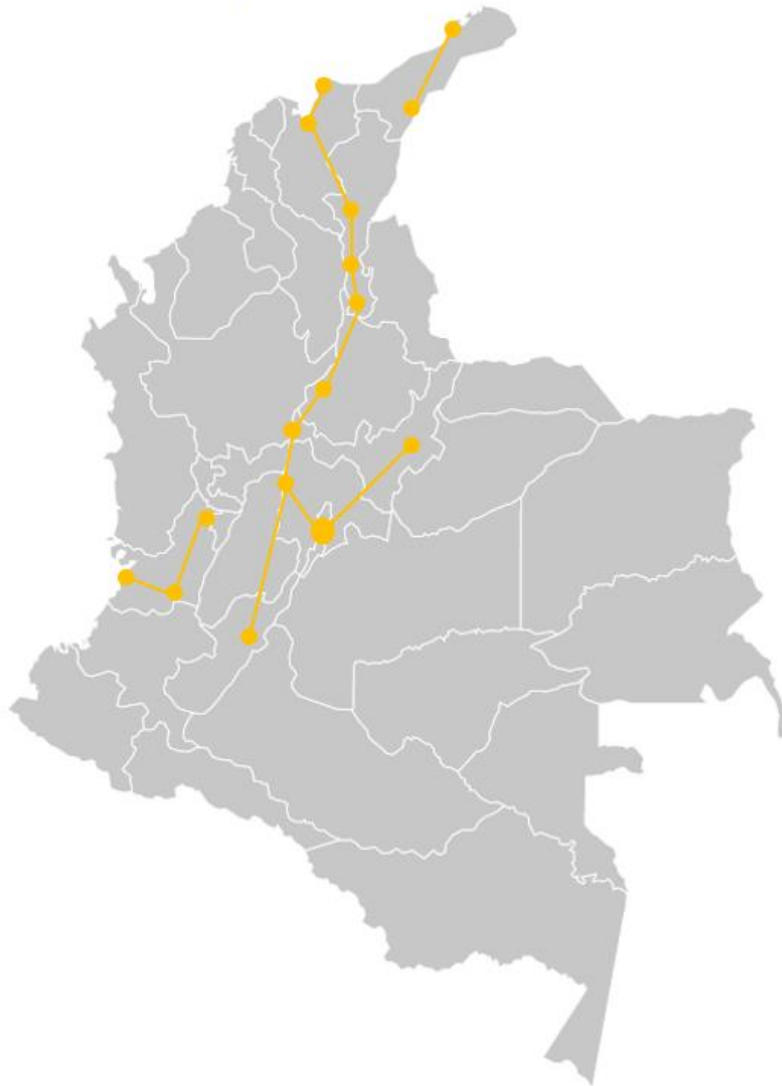


Source: Agra CEAS based on Ministry of Tourism

Rail freight

Rail in Colombia does not constitute significant means of transportation for dealing with freight. It is mainly combined with the current condition of the rail network, where only half of national network is operational in relation to cargo transportaion²⁸. That said, in recent years more subsidies have been allocated in rennovation of the network, e.g. between Buenaventura and La Tebaida.

Figure 4-4: Railway network in Colombia



Source: Agra CEAS based on Colombia Trade and Ministry of Tourism

²⁸ El desarrollo de la infraestructura en Colombia ; <https://www.legiscomex.com/Documentos/DESARROLLO-INFRAESTRUCTURA-COLOMBIA-RCI285>

Road Freight

Vast majority of inland freight transportation is carried out through the road network, which has been subject of continuous financial support from the government via several projects and initiatives, .e.g. *Autopista Ruta de Sol, Autopista de la montaña* among others²⁹.

4.4.2 Distribution

4.4.2.1 Retail channel overview

Supermarkets & hypermarkets

Over the last decade, Colombia has undergone a **massive retail transformation, with large domestic and international grocery chains opening several modern stores throughout the country**. In total, supermarkets and hypermarkets now account for 60% of distribution of food products. Amongst retailers, discount stores have been growing at higher rates and continuing opening new outlets offering more affordable products³⁰.

The most important retailers are the following:

- **Grupo Exito**, the leading food retailer in Colombia. With 540 outlets, it accounts for the majority of supermarket sales in Colombia.³¹ This grocery stores also offer a wide variety of imported food products. The group has recently introduced the **Carulla Fresh Market** concept, with wide offerings; for example, an indoor vegetable garden, artisan pizza, certified sustainable beef, and vegetables harvested the same day. This concept was implemented in six Colombian stores (3 in Bogotá, 1 in Cartagena, 1 in Santa Marta, and 1 in Medellín)³².
- **Olimpica**, the leading food retailer on the Caribbean coast, present in 105 Colombian municipalities, through 350 outlets³³.
- **Jumbo-Cencosud**, which acquired Carrefour Colombia in 2012, has 110 stores in Colombia, under the brands “Jumbo & Metro”.

“Tiendas”

Despite the greater importance of supermarkets and hypermarkets in terms of sales, traditional groceries remain the most widespread retail format in Colombia. These outlets, also known as “*tiendas*”, are usually small, independent and present all over the country. According to a recent survey, in Bogotá there is a mom-and-pop store for every 94 homes. **In small towns and villages in remote areas of the country, where modern retail is not present, there is a reliance on these traditional shops for their food and**

²⁹ El desarrollo de la infraestructura en Colombia; <https://www.legiscomex.com/Documentos/DESARROLLO-INFRAESTRUCTURA-COLOMBIA-RCI285>

³⁰ The distribution network in Colombia, <https://www.nordeatrade.com/fi/explore-new-market/colombia/distribution>

³¹ Grupo Éxito announces 3.4% sales growth in Colombia in Q2, <https://retailanalysis.igd.com/news/news-article/t/grupo-xito-announces-34-sales-growth-in-colombia-in-q2/i/22291>

³² Grupo Éxito's Consolidated Results 2018, <https://www.grupoexito.com.co/en/press-room/news/grupo-exito-s-consolidated-results-2018>

³³ Olimpica website: Nuestra empresa, <https://www.olimpica.com/quienes-somos>

beverage purchases. “Mom-and-pops” usually offer small/individually packaged products and purchase frequency is higher.³⁴

eCommerce

Colombia is Latin America’s fifth largest e-commerce market, and the only country in the region with a Ministry of E-Commerce, making it clear that this market is central for the government. Online commerce is booming in Colombia, growing by 64% in 2016 and by 22% in 2017. This growth is driven by improved access to the internet, especially through smartphones, and increase online services, like online payment services. However, also the the recent VAT increase from 16% to 19% on foodstuffs and the subsequent increased prices has contributed to make the online channel more popular. **Food and beverages are amongst the products preferred by consumers when purchasing online.** Most retailers have indeed websites available for shopping online. However e-commerce is affected by poor infrastructure, especially highways that connect to ports, which makes supply chains more complicated.³⁵

Hotels, restaurants, and cafés

In Colombia, an increasing number of consumers (currently 42%) dine out at least once a week. Furthermore, foreign tourism is rapidly increasing. As a result, the HoReCa channel is expected to expand and reach approximately EUR 34.6 billion in sales in 2021. **Within the restaurant sector, quick service and fast food restaurants account for one third of the market** and are very popular in large cities, such as Cartagena, Medellín, Cali and Bogotá. McDonald’s, Presto, El Corral and Burger King dominate the market; therefore, independent restaurants and small chains are facing some challenges, especially following the recent VAT increase from 16% to 19% on foodstuffs.³⁶

4.4.2.2 Intermediaries

The most important commercial areas are in large cities such as Bogotá, Medellín, Cali, Barranquilla, Bucaramanga, Cartagena and Pereira. To successfully export to Colombia, it is strongly recommended to engage a local agent or a distributor on the ground, with knowledge of the products, target markets and significant contacts. This is particularly true for the alcohol market, where such a partner should be well positioned to navigate potential long and cumbersome bureaucratic procedures. However, a disadvantage to this approach is that employing a third party inevitably raises the market access costs. Furthermore, the operator loses some control over sales and/or marketing. **Using the wrong distributor may eventually increase the risk of products to be copied or counterfeited.**

To ensure that the products exported to Colombia are appropriately managed by the agent/distributor, the operator is recommended to take the following steps:

³⁴ The distribution network in Colombia,

<https://www.nordeatrade.com/fi/explore-new-market/colombia/distribution>

³⁵ E-commerce in Colombia, <https://www.nordeatrade.com/fi/explore-new-market/colombia/e-commerce>

³⁶ The food business is reinvented in Colombia after a bad 2017, <https://www.dinero.com/edicion-impresa/negocios/articulo/como-van-los-restaurantes-en-colombia-2018/255322>

- Be committed to the agent/distributor and the market/s and have frequent exchanges with him/her. This also provides the operator with an opportunity to verify how its products are placed on the market.
- Working closely with agents and distributors to show them how they can profit from the food or beverage products placed on the Colombian market.
- Helping to prepare marketing strategies to promote the foodstuff products on the market.³⁷

The first two above-mentioned steps are particularly important, as Colombians usually **want to know their supplier personally** before deciding whether starting business. In Colombia, it is **ultimately beneficial to develop strong personal relationships to ensure a long-lasting business relationship**. Periodic visits to the partner, where possible, will help cultivate the relationship; and in all cases it is important to continue to stay in contact with the local partner (and support them with e.g. market development for the product if possible) in order to ensure longer term success.

Some further points to bear in mind regarding intermediaries are as follow:

- It is advisable to make background checks on partners. One way of doing this is through chambers of commerce.
- For most products, it is possible to find intermediaries without fixed minimum quantity or volume requirements. However, for some products (such as wine), larger intermediaries are increasingly dominant and they may have certain requirements for partners. For some products which may be imported in smaller quantities such as olive oil, it may be beneficial to join with other producers in shipping products to an intermediary in Colombia, as this may reduce shipping prices and increase attractiveness for the intermediary.
- For alcohol products in particular, it is worth investigating the cashflow of any intermediaries. As the bureaucratic procedures can take time, the intermediary may not receive payment from retailers till several months later so will require sufficient cashflow in the interim. This potential delay in payment should also be borne in mind by any EU companies exporting.
- While generally it is preferable to work with experienced partners as outlined above, for some products such as chocolate, there are local startups by young entrepreneurs which target the boutique market; and such startups may make interesting, albeit slightly riskier partners.
- For some products such as fruit and vegetables, large wholesale markets such Corbastos (<https://www.corabastos.com.co>) play an important role in the wholesale process, and group various potential intermediaries.
- It is important to register your brand in Colombia in your name as the owner from the country of origin, rather than in the name of the importer or distributor. It is recommended to work with law firms who are specialized in brand registration when doing this.
- Some exporters have come to Colombia, visited rural areas and made a contribution for a social cause (like helping disadvantaged communities). While this kind of social action has primarily a

³⁷ UK Trade and Investment: Doing business in Colombia? We can help;
http://www.iberglobal.com/Archivos/Colombia_Business_Guide.pdf

philanthropic purpose, it also has secondary effects that help generate a good reputation and more sales for the brand too. Wine exporter Emilio Moro is an example of a company which took this approach.

Business Contact Database:

A database of importers, wholesalers, retailers and distributors can be found in section 8.5

N.B. due diligence will have to be performed for any contacts on this database as no warranty is given as to the standing of these individuals, organisations or firms and no corresponding responsibility or liability is accepted by the authors.

4.4.3 Business environment

While Colombia's rankings in key indices have been fairly high compared to other countries in the Latin American region, they have recently started deteriorated slightly owing to a lack of reforms:

- In the **Index of Economic Freedom**, Colombia's ranking is the sixth best in Latin America in 2019 but has worsened compared to the previous year, owing to deteriorations in the trade landscape, amongst others.
- In the **World Bank's Ease of Doing Business** (Doing Business) 2019 report, Colombia has achieved the fourth best ranking in Latin America. However, its ranking has deteriorated since 2018, as there have been no further reforms. Notably, enforcing contracts seem to be a burden; the time to resolve a dispute is nearly double the Latin America and Caribbean average, while costs are also significantly higher.³⁸

4.4.4 Key operational considerations and challenges: summary

Operating in the Colombian food and beverage market can be characterised by strong trust, and thus involvement of agents/distributors in the process of introducing new products to the market. Generally speaking, as mentioned in section 4.4.3, Colombians rely on strong interpersonal relationships when it comes to building business partnerships. They have a preference prior personal acquaintance of their suppliers before proceeding with tightening the business exchanges.

A key operational challenge is the developing road system, which is by far the most important logistical service used in freight transportation within the country, as the rail network has been only partially operational, when it comes to cargo.

³⁸ Source: Euromonitor International: Economies and Consumers, 2019

4.4.5 Other relevant information

4.4.5.1 Methods of payment in Colombia

Colombia's national currency is the Colombian Peso (COP), which is freely convertible. In general, the currency for payments may be freely chosen. In practice, however, **traders tend to prefer the US dollar (USD) as the currency for commercial exchanges**, in Colombia. The importation of currencies up to an amount of USD 10 000 is allowed without any registration with the National Tax and Customs Directorate (DIAN). In any case, commercial invoices made out in currencies other than USD must state the exchange rate to the USD. The recommended term of payment is a letter of credit.

4.4.5.2 Travel from the EU to Colombia

In 2015, the EU signed a short-stay visa waiver agreement with Colombia. The new visa regime provides for **visa-free travel** for EU citizens when travelling to the territory of Colombia **for a period of stay of 90 days**. This regime applies whatever the purposes of travel (including business), as long as it does not include a paid activity. When the purpose of the travelling is to carry out a paid activity, this regime is not applicable.

5 Market Snapshots for Selected Products

This section provides specific information for various food and beverage categories and products. This information covers three main categories:

- **Consumption:** data on the evolution of consumption; consumer profiles and any notable consumer trends;
- **Offer:** domestic production; imports and exports; the competitive landscape; relevant specific customs procedures/import considerations;
- **Distribution:** main distribution channels used; domestic and imported offer;

Furthermore, each category contains a SWOT analysis and a key takeaways message.

Fresh meat	Dairy	Beer
Chocolate and confectionery	Spirits	Wine
Baked goods	Pasta and other staples	Olive oil
Processed fruit and vegetables	Fresh fruit and vegetables	Processed meat
Live plants	Processed cereals	Honey

5.1 Fresh fruit and vegetables

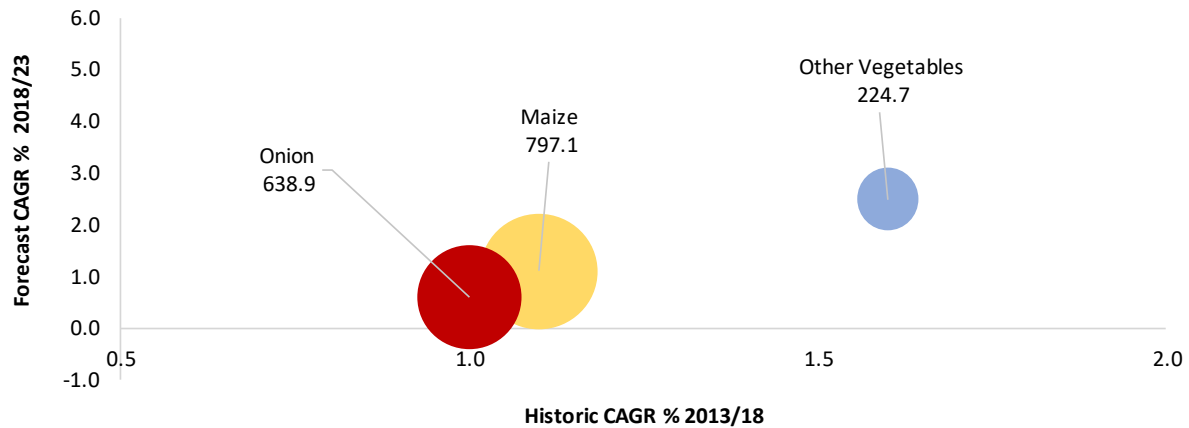
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ Large market. ▪ Openess to a variety of fruits and vegetables. 	<ul style="list-style-type: none"> ▪ Massive domestic production of fruit and a huge trade surplus. Only small structural deficit for vegetables. ▪ General preference for locally produced fruit and vegetables. ▪ Imported fruit and vegetables limited to a small segment of society.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ Niche opportunities, primarily for certain fruits. Apples stand out in particular; and also cherries to a certain extent. ▪ Potential interest in diversifying supply away from north American provides on whom Colombia is currently quite reliant. ▪ Increasing interest in organic fruit and vegetables. 	<ul style="list-style-type: none"> • Domestic production, which covers more or less all types of fruit and vegetable to some extent due to Colmobia’s biodiversity. • Chile, the US and Canada - which are all geographical close - dominate imports.

5.1.1 Consumption

5.1.1.1 Evolution of consumption

Overall consumption of fresh vegetables in Colombia has been steadily growing in recent years. As presented in Figure 5-, maize accounts for the largest share in the Colombian market. Consumption of maize has slightly increased (1.1% per year between 2013 and 2018) and it is projected to keep an upward trend. The second biggest vegetable category is onion, which alike maize, noted stable growth of 1% per year in years 2013-2018. Consumption of tomatoes, the third biggest category, went up more rapidly, namely by 2.8% per year between 2013 and 2018. Consumption of fresh vegetables is predicted to remain on upward trend. Cherries noted the strongest growth of 22% per year between 2013 and 2018 and are expected to continue to grow over the next years.

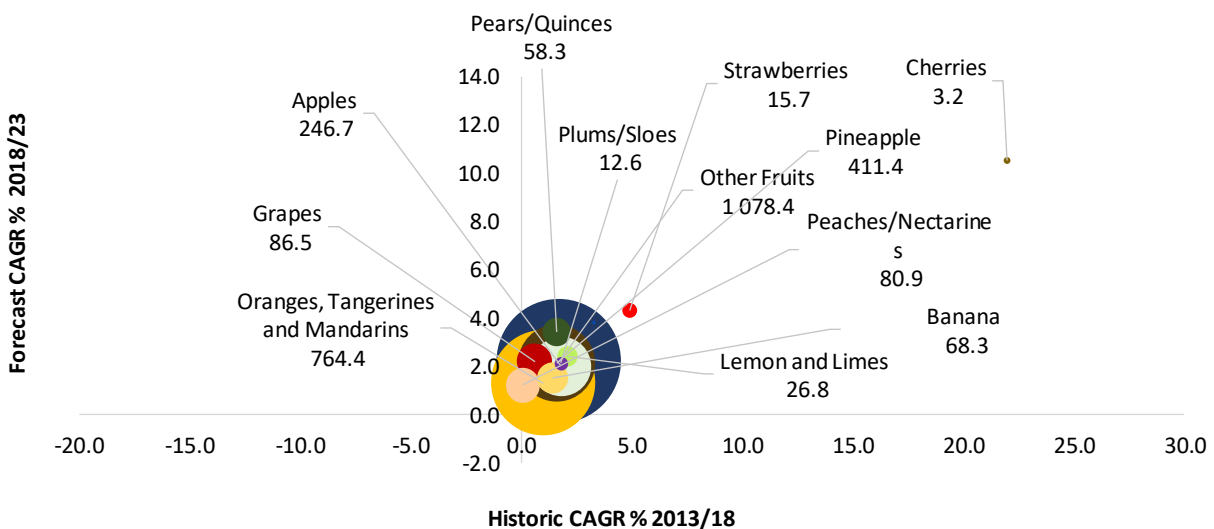
Figure 5-5: Evolution and forecast of vegetables market (000 tonnes) in Colombia, 2013-2023; total volume



Source: Euromonitor International: Fresh Food, 2019.

Fresh fruits in Colombia have been increasingly popular, as consumption of all fruits rose in years 2013-2018. Other fruits (such as apricots, melons, avocados, and figs among others) make up for the biggest part of the market, followed by oranges, tangerines and mandarins. Consumption of the first group of fruits has been steadily growing (1.7% per year in years 2013-2018) and it is expected to grow further, noting an increase of 2.2% per year. Consumption of oranges, on the other hand, noted a less significant increase of 1% per year between 2013-2018 and is predicted to slightly pick up (1.3% per year in the next years). Moreover, pineapples and apples also account for substantial part of the market, with stable growth of consumption (1.6% and 1.8% per year respectively).

Figure 5-6: Evolution and forecast of fresh fruits market (000 tonnes) in Colombia, 2013-2023; total volume



Source: Euromonitor International: Fresh Food, 2019.

5.1.1.2 Consumer profile and purchase criteria

Consumers

Regarding fruit and vegetable sales in Colombia, main consumer groups can be differentiated along the following criteria:

- **Income:** The lower the level of income, the lower the level of consumption of fruits of vegetables.
- **Gender:** The amount of fruits and vegetables consumed is almost the same between men and women. Nevertheless, women are considered to be more aware of the general health benefits of consuming fruits and vegetables due to their concern about raising children.
- **Age:** Even if fruit and vegetable consumption in Colombian children is much lower than the recommended amount, there is a growing consciousness among parents and the educational community to encourage healthy eating habits in children. Therefore, it is more common now to include especially fruits as snacks in lunch boxes that children take to school. Apples, bananas, mandarins, grapes are some of the most common fruits to pack in lunch boxes due to their practicality. In fact, studies by Fruit and Vegetable Consumption Habits in Habitants of Bogota between the Ages of 19 and 35 show that in households with more children, the amount of fruit and vegetable consumption is more than in households with fewer or no children.

It should be also pointed out that apart from varieties of fruits known in Europe, Colombia produces a considerable number of exotic fruits³⁹, such as Arazá, Badea, Borojón, Cherimoya, Guava, Zapote and Uchuva, among many others. Colombians have a strong preference for exotic fruits (such as Maracuyá, Gulupa, Uchuva, Zapote, Pitaya, Mangosteen, Borojón, Lulo, Curuba among others) as well as fruits, such as oranges and bananas, which are used for producing fresh juices. Therefore, oranges, bananas, pineapples, apples and other exotic fruits are widely popular in Colombia.

In terms of vegetables, Colombia has a very rich variety of products⁴⁰. Apart from maize, considered as a staple, Colombian consumers tend to choose basic vegetables such as onion, potatoes, bell peppers, broccoli and lettuce, among many others. Moreover, Colombia is known for the high availability of various tuber (root) vegetables as well as squashes.

Against this background, the most popular fruits and vegetables by Colombian consumers are the following:

- lemon, banana, mango, tree tomato, mora, pineapple maracuya, orange (in terms of the percentage of consumers);
- mango, orange, apple, avocado, mandarina (in terms of the quantities consumed);
- tomato, onion, carrot, scallion, green beans, cabbage, lettuce (in terms of the percentage of consumers).

³⁹ 30 Exotic Tropical Fruits of Colombia a Fruit Lovers Paradise; <https://medellinguru.com/tropical-fruits/>

⁴⁰ Being a vegetarian in Colombia; <https://www.uncovercolombia.com/blog/vegetarian-colombia/>

Around 70% of the Colombian people are said to prefer consuming local fresh foods, as the domestic offer has a large variety and good quality. In spite of the considerable domestic production of both fresh fruit and vegetables in Colombia and vast variety of products available (see section 5.1.2.1), consumers have also started to appreciate other not European products, especially imported apples and pears. Indeed, Polish, French and Belgian apples have been particularly popular in Colombia.⁴¹ A variety of other EU imported fruits and vegetables are present in the market, like oranges and mandarins from Spain; grapes from Portugal, Spain and Italy; onions and garlic from the Netherlands. However, consumers do not generally distinguish and look for the country of origin of these products, as they do with wine or a chocolate from the EU, for instance. In any case, imported fruits and vegetables are considered to be premium and expensive products within the reach of upper-middle and high-income groups.

Drivers and method of consumption

Fresh fruit in Colombia is highly popular and considered as a snack, as well as staple when it comes to fresh juices, which popularity is widely spread across the country⁴². Consumers also match fruits with certain dishes, as a complimentary ingredient.

Both fruits and vegetables are seen as essential sources of valuable nutrients required for stay healthy; indeed health considerations have been identified as the main driver for fruit and vegetable consumption among under 35s. Consumption of fresh fruit and vegetables is also driven by traditional eating habits, which have always involved both products. Whereas fruits are mostly considered as a snack and an ingredient of fruit juices, fresh vegetables are mostly used in traditional Colombian cuisine, as a staple for popular dishes.

Imported fruits and vegetables in Colombia are considered to be premium and expensive products that appeal to consumers from the upper-middle and high-income groups. They can be found only in big markets specialized in fruits and vegetables like Surtifruver, supermarkets like Carulla, Jumbo, Exito and hypermarkets like Pricemart, as well as some gourmet markets like Gastronomy in the major cities of the country.

Purchase criteria

Sales of fruit and vegetable as a whole are usually influenced by the following criteria:

- **Price:** This is the most important purchasing criterion, especially for low and lower-middle income group. More affluent consumers, on the other hand, are willing to pay a higher price for other priorities such as quality, packaging and organic claims.
- **Packaging:** Fruits and vegetables are mostly sold in loose format; nevertheless, they also come in packages, especially in supermarkets. Low and lower-middle income groups prefer to buy loose

⁴¹ Apples account for 31% of fruit imports in Colombia; <https://www.freshplaza.com/article/9157871/apples-account-for-31-of-fruit-imports-in-colombia/>

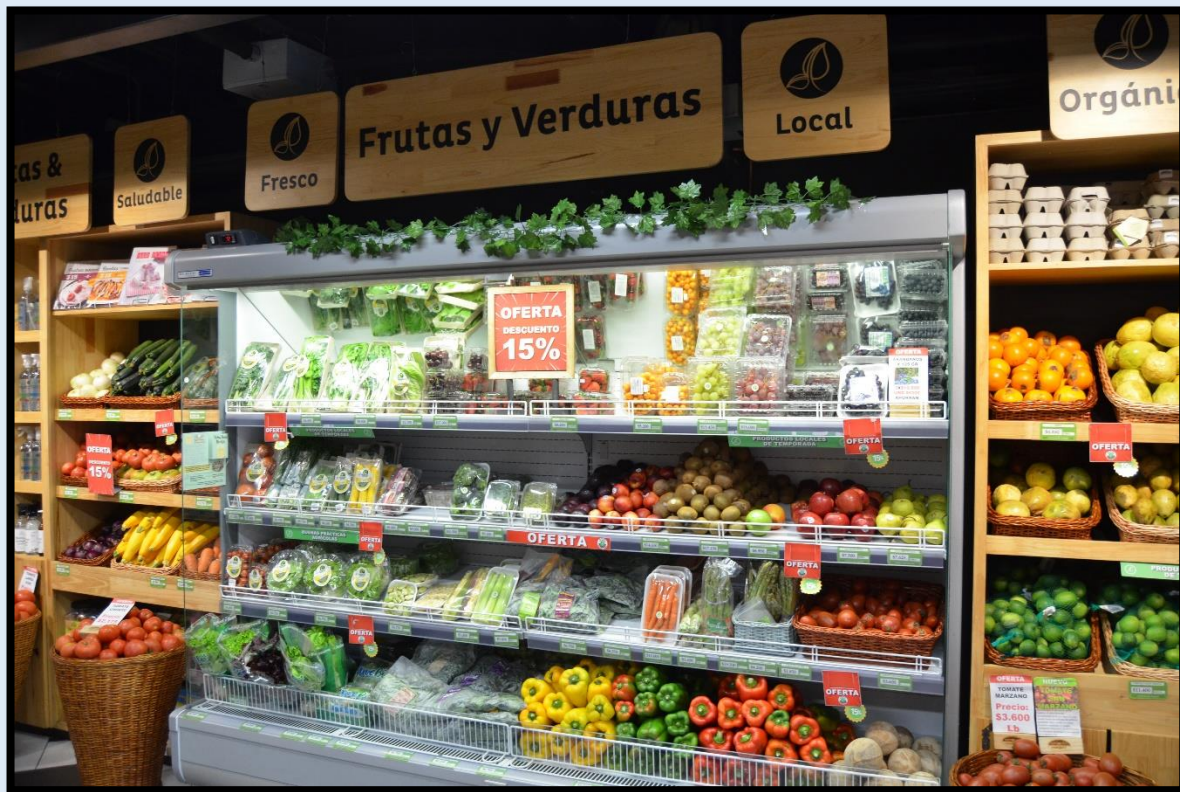
⁴² Healthy fresh Colombian jugos tropical juices; <https://colombiatravelreporter.com/colombia-food/healthy-fresh-colombian-jugos-tropical-juices/>

fruits and vegetables in order to avoid the extra cost of the package, whereas more affluent consumers prefer to pay more to buy packaged products, which they perceive to be selected and of better quality.

- **Health consciousness:** The general health and wellness trend that has been growing in Colombia also encourages the consumption of fruits and vegetables. All fruits and vegetables are associated with good health, although some are recommended for specific situations, like oranges and mandarins rich in vitamin C to prevent colds, apples to help with gastro-intestinal infections, and pitahaya to accelerate digestion. A study carried out in Bogotá in 2015 on people between the ages of 19 and 35 revealed that almost 75% of consumers' considerations related to health, wellness and nutrition were the primary motivating factors for consuming fruits and vegetables, as they perceived fruits and vegetables to prevent and cure illnesses. Taste as a motivating factor ranked much less, for around 9% of the study population. On the other hand, in the same study, price was a discouraging factor to buy fruits and vegetables for 21% of the consumers, followed by the time spent in the purchase and preparation of fruits and vegetables, which was an inhibiting factor for 17% of the consumers. Country of origin was not a positive or a negative consideration, being more of an irrelevant factor.
- **Organic foods:** As part of the health and wellness trend, there is also an emerging consciousness about organic food, free from hormones and chemicals. Even if the demand for it is still niche, there are consumers that look for it either due to certain medical conditions or for a healthy lifestyle. For example, Taeq is the healthy brand exclusive to the supermarkets Carulla and Exito, which also carries some organic products such as carrots, tomatoes, potatoes, green beans and lettuce.

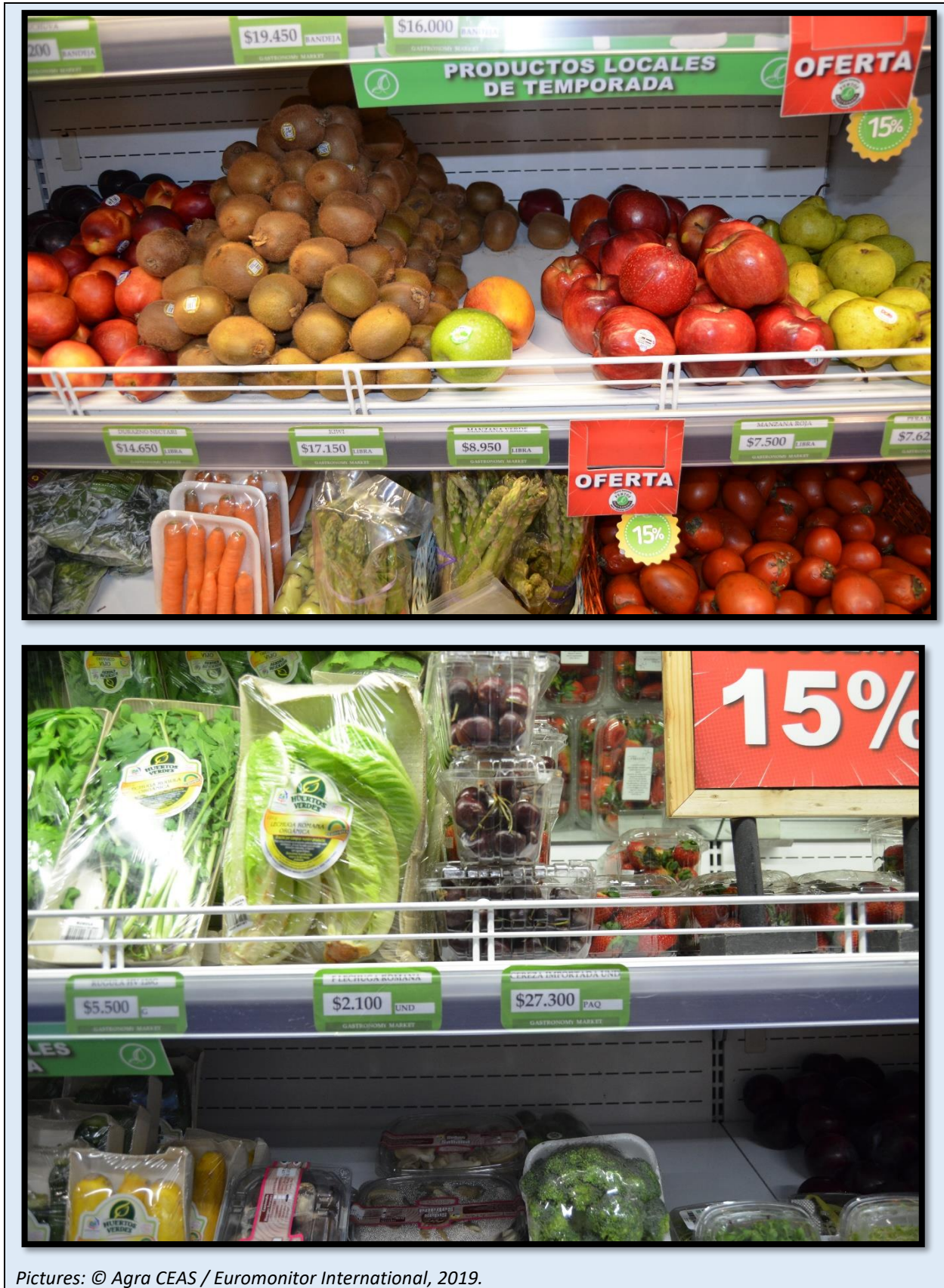
It is not very common to find a commercial advertisement of fruits and vegetables in Colombia (local or imported); though campaigns are organised by the national and local governments as well as sectorial associations to promote fruit and vegetable consumption more generally. Retailers such as supermarkets promote the sales of fresh fruits and vegetables by offering periodic discounts. That said, there was a fairly successful recent campaign for apples from France in late 2018 (following their reentry to the market). This campaign was called "European Appointment: Apples from France, very! ... CRUNCHY!" It comprised tasting events in supermarkets and on the streets, with the fruit mainly itself distributed through supermarkets in the country.

F&V on Colombian retailers' shelves...



Certain supermarket or hypermarket retailers offer sales promotions on imported products, such as discounts (i.e. 15% in the image above), or 20% off on certain days.

Certain keywords, such as "fresh" (fresco), "local", (local) and "organic" (orgánico) may be used to draw consumers attention to features of the fruit. Cases of these words focusing on the foreign origin of fruit or vegetables have not been detected, however. Indeed, the origin of the product may not be indicated next to shelf pricing (see pictures below), though they may be indicated on the packaging. Imported fruit and vegetables can be found for sale both packed and loose in supermarkets and hypermarkets.



Pictures: © Agra CEAS / Euromonitor International, 2019.

5.1.1.3 Recent market trends

In general terms, consumption of both fruit and vegetables has been on the rise and will continue to stay on the upward trend. The Colombian market is very diverse in terms of varieties available due to substantial domestic production of exotic fruits; and demand for these is forecast to grow slowly but steadily. The Colombian fresh fruit and vegetables market also witnessed strong demand for cherries, which is predicted to continue rising, although at lower pace (10.5% per year over the forecast period, in comparison to 22% per year between 2013 and 2018). However, in terms of market size, cherries remain a niche category. Demand for cherries was boosted a few years ago by positive press about their status as a super fruit due to its nutritional and health benefits. Seasonal demand for them usually peaks in the Christmas period in Colombia, as the traditional Christmas cake includes cherries along with other fruits and nuts.

5.1.2 Offer

5.1.2.1 Domestic production

Colombia produces one of the widest ranges of fruit and vegetables in the world. Due to favourable soil qualities and variety of climates in the country, Colombian growers benefit from availability of light and harvest throughout the year. Effectively, Colombian fruits are known for their organoleptic qualities. Colombia is among three top producing countries of fruit in Latin America and seventh largest producers of vegetables in Latin America⁴³. The country's production of fresh fruit and vegetables is mainly located in Antioquia, Bolivar, Santander, Cundinamarca, Risaralda and Quindio among others.

Regarding fruit, in 2018, 8 162 tonnes of apples, 31 200 tonnes of grapes, and 34 738 tonnes of peach were produced in Colombia.

5.1.2.2 Imports and exports

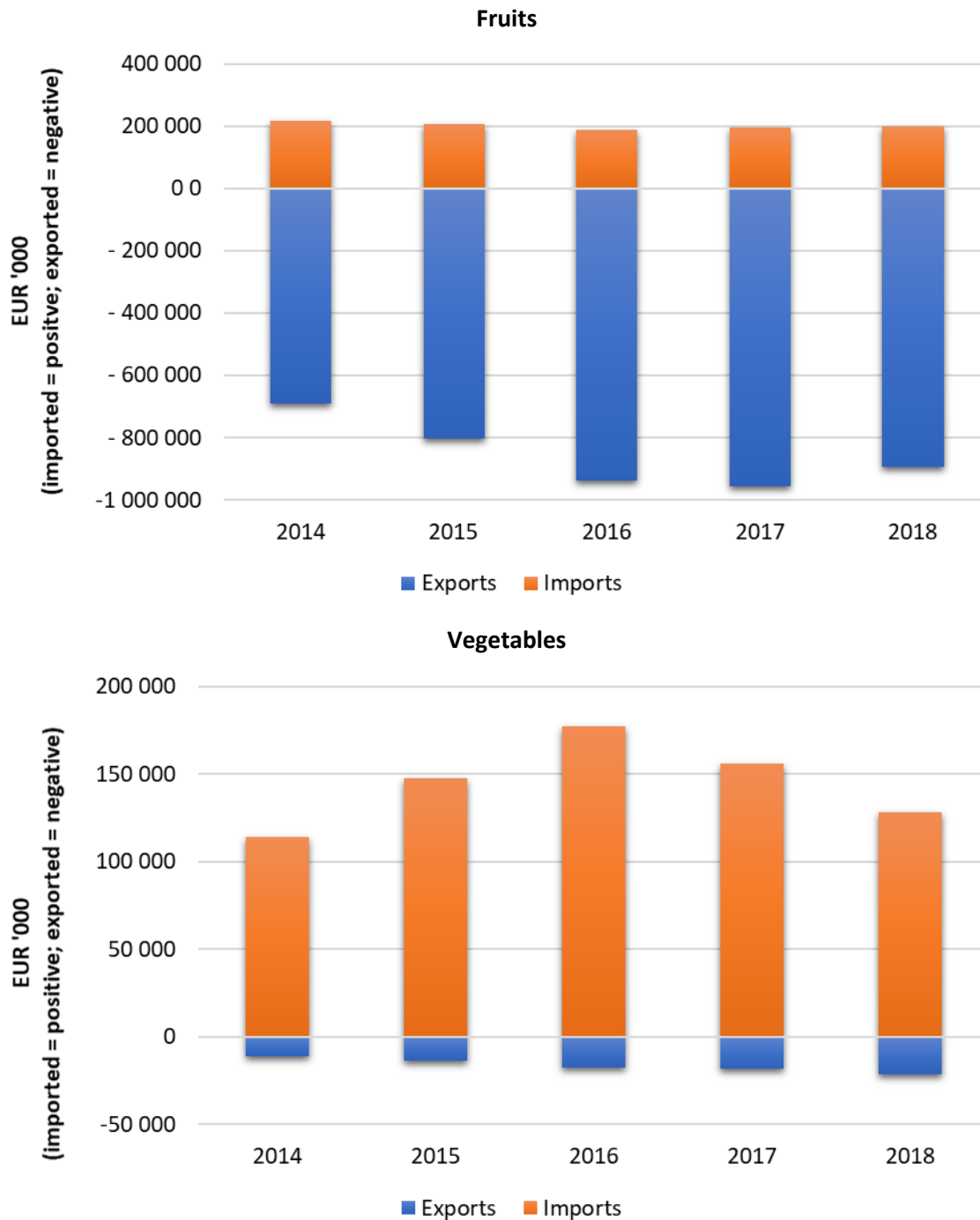
As Figure 5-1 shows, Colombian exports of fresh fruit significantly outweigh imported products, in terms of value, which rose in years 2014-2017 to slightly drop in 2018 and account for almost 900 million EUR. Exports reached their peak in 2017 amounting to almost 960 million EUR. Imports of fresh fruit, on the other hand, have remained stable, oscillating between 200 million EUR and 210 million EUR. Colombia is a major exporter of bananas, which constitute the greatest share of exported fruits from Colombia. Apples, on the other hand, are the largest category in the imports of fruits, corresponding to around 30% of all imported fruits and vegetables. Indeed Colombia is a net importer of apples, as the country produced only 8 162 tonnes of apples in 2018, whereas 102 233 tonnes were imported (Figure 5-2).

Colombian imports of fresh vegetables significantly exceed exported products, which value reached slightly over 20 million EUR in 2018. The value of imported fresh vegetables was on rise between 2014

⁴³ Horticultural sector; <https://www.investincolombia.com.co/sectors/agribusiness/horticultural-sector.html>

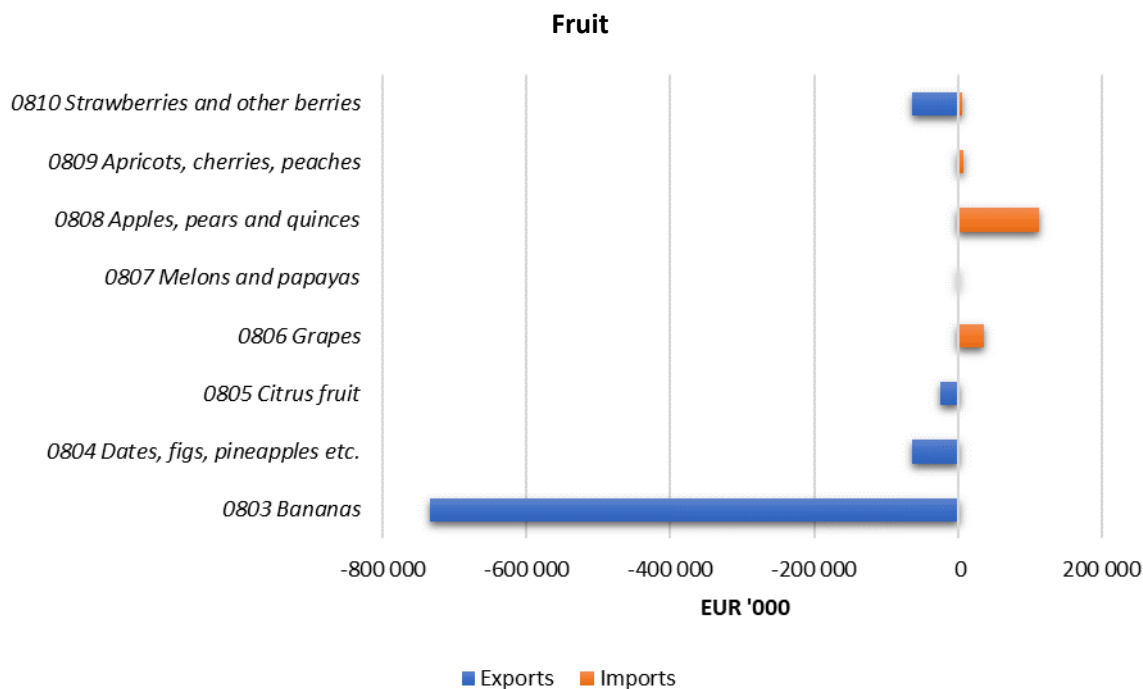
and 2016, reaching its peak and account for about 175 million EUR, and subsequently dropped in 2018, amounting to almost to 130 million EUR (Figure 5-1).

Figure 5-1: Trade balance (imports and exports) of fruits and vegetables in Colombia, 2014-18; value 000 EUR



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN code 07 and 08.

Figure 5-2: Trade balance of fruit by type, 2018 (value 000 EUR)



Note: due to a lack of data, the graph on trade balance of vegetables by type could not be produced.

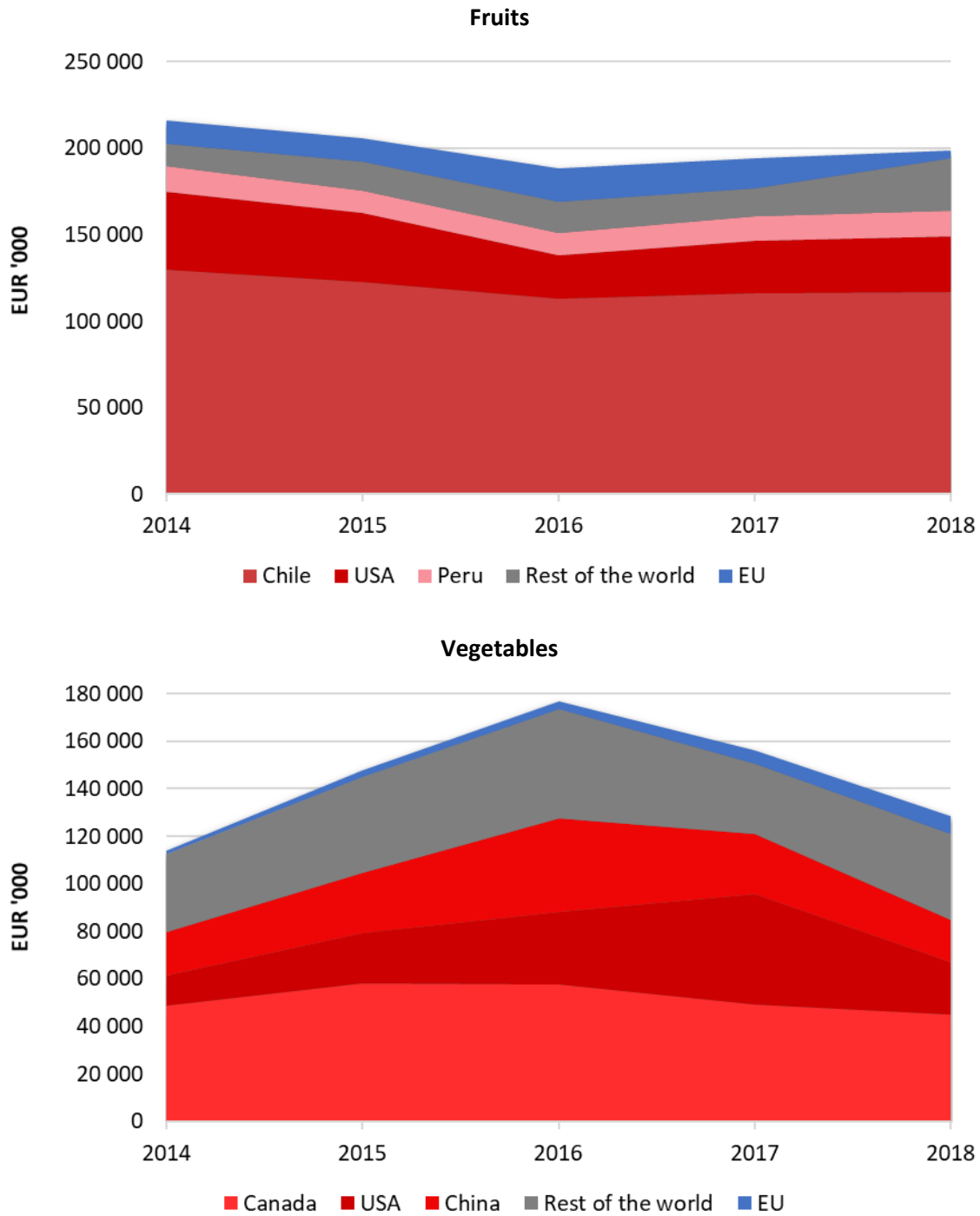
Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Note: names for CN codes abbreviated in most cases.

Colombia imports fresh vegetables mainly from three countries: Canada, USA and China. Imported vegetables usually include carrots, lettuce, beets, onions and turnips among others⁴⁴. However, some products are being imported from, e.g. Peru, Ecuador and Mexico. Imports from EU countries are rather marginal, with Belgium having the greatest shares. Fresh fruits, on the other hand, are being imported mainly from Chile. Other notable importers include USA and Peru. EU countries other than Belgium do not account for major shares of Colombian imports, with France and Spain being the biggest players (Figure 5-3).

⁴⁴ Conozca cuáles son los alimentos importados que más consumen los colombianos ; <https://www.elpais.com.co/economia/conozca-cuales-son-los-alimentos-importados-que-mas-consumen-los-colombianos.html>

Figure 5-3: Colombian imports of fruits and vegetables by country, 2014-18; value 000 EUR



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
 Data for CN code 07 and 08.

5.1.2.3 EU GI products

As reported in section 9, under the EU-Colombia and Peru Trade Agreement, several products are recognised as Geographical Indications in Colombia, however the list do not include any fresh fruit and vegetables.

5.1.2.4 Main competitors

As described in section 5.1.2.1, Colombian market is characterized by considerable domestic production. The market is dominated by Colombian producers, especially in the fruit sector. In terms of importers, the biggest competitors include producers from USA, Canada and China in case of vegetables and Chile in the fruit sector.

5.1.3 Specific market entry requirements

Market Access and Entry

As described in section 4.2.1, European producers should register their products with the INVIMA and MINICOMEX⁴⁵. Furthermore, products must comply with the Law 9 of 1979 on imports of food products, (see section 4.2.2). In addition, producers should be aware of other documentation applicable, when entering the Colombian fruit and vegetables market (detailed Table 4-2), such as:

- Certificate of fumigation,
- Certificate of analysis,
- Application sheet for phytosanitary requirements,
- Phytosanitary certificate,
- Phytosanitary Import permit,

Detailed information on import duties and Rules of Origin can be consulted on the European Commission website:

https://madb.europa.eu/madb/datasetPreviewFormATpubli.htm?datacat_id=AT&from=publi&hscode=0402&countryid=CO

Customs procedures

A list of standard documents required for imported dairy products in Colombia is presented in section 4.2.1

Any other up to date information on appropriate documents concerning customs procedures can be consulted on European Commission website:

https://madb.europa.eu/madb/datasetPreviewFormATpubli.htm?datacat_id=AT&from=publi&hscode=0402&countryid=CO

⁴⁵ In accordance with Decree 3075/1977, the following products are not subject to registration: (a) non-transformed chilled and frozen animal-origin food products, (b) non-transformed natural food products, and (c) raw materials for food preparation.

SPS measures

All sanitary and Phytosanitary measures concerning the import of are in line with international standards. It should be pointed out though that additional documentation might be required (as per Table 4-2).

Up to date information on appropriate documents concerning SPS measures:

https://madb.europa.eu/madb/datasetPreviewFormATpubli.htm?datacat_id=AT&from=publi&hscode=0402&countryid=CO

Labelling

As indicated in section 4.2.3, the labelling requirements of fresh fruit and vegetables are established by the Resolution 5109/2005. As described in more detail in section 4.2.3, fresh fruit are exempted from the requirement of providing nutritional components ([Resolution 333 of 2011](#)).

5.1.4 Distribution

The main channels for the distribution of fresh fruit and vegetables are set out below:

- **Marketplaces:** Popular marketplaces and farmers' markets are found in smaller cities or the most traditional neighbourhoods of big cities. These are attended mostly by the low and lower-middle income groups, who look for large quantities of products for low prices. Paloquemao and 12 de Octubre are some examples from Bogota.
- **Independent small grocers:** This is the most common form of distribution of fresh fruits and vegetables. These are mostly located in neighbourhoods, attended by the low and lower-middle income groups, who buy different products on a daily basis according to the availability of their resources.
- **Supermarkets and hypermarkets:** Modern retail stores such as supermarkets and hypermarkets are attended by the upper-middle and high-income groups in the more affluent sectors of big cities. Carulla, Jumbo, Exito are some of the best-known supermarkets. Pricesmart and Alkosto are the current hypermarkets. Some supermarkets like Surtifruber are specialized in fresh fruits and vegetables, but they also sell other grocery items in smaller amounts. This channel is key for imported fruit and vegetables.
- **Gourmet markets:** There is a new trend of gourmet markets in big cities like Bogota, where the primary products are imported or organic foods. One example from Bogotá is Gastronomy.

It should be noted that Corbastos (<https://www.corabastos.com.co>) is a key market for the wholesale of fruit and vegetables in Colombia, whether imported or domestic.

5.1.5 Challenges for EU products

European producers could face challenges in entering Colombian market, especially the fruit sector due to substantial level of domestic production as well as strong consumer loyalty towards domestic, and often, exotic varieties of fruits. Relatively fewer obstacles could be expected when entering the vegetable market, however producers should bear in mind that imports of certain vegetables rely on several countries. It should be also remembered that production of vegetables in Colombia is ranked seventh in

Latin America, thus the self-sufficiency is also considerable. Lastly, it should be pointed out that, up to now, imports of European products have been rather marginal.

Market Takeaway: Fresh fruit and vegetables

Consumption: Consumption of both fresh fruit and vegetables has been on rise, and it is expected to remain on the upward trend over the forecast period.

Competition: Market dominated by domestic producers, especially in the fruit sector. In case of fresh vegetables, the country's production has a high self-sufficiency rate with imports of certain products from countries such as USA, Canada and China.

Distribution: while marketplaces and small independent grocers account for the majority of distribution, supermarkets and hypermarkets are key for imported fruit and vegetables.

Challenges: Dominance of domestic producers, with simultaneous low imports of European products can be considered as the greatest challenge.

Opportunities: Positive image of fresh fruit and vegetables as well as predicted increase in consumption over the

5.2 Dairy

5.2.1 SWOT analysis

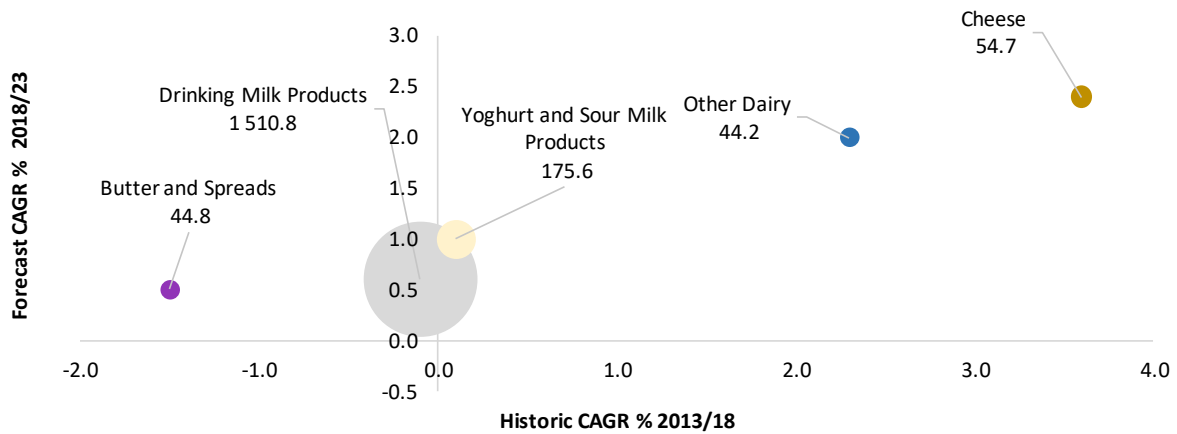
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ Familiarity with dairy products among Colombian consumers and high level of consumption. ▪ Large market. 	<ul style="list-style-type: none"> ▪ High percentage of informal independent grocers, selling unbranded products (especially fresh raw milk and soft type of cheese). ▪ Consumer loyalty towards domestic products. ▪ Market shows signs of reaching a mature stage.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ Healthy image of dairy products. ▪ Forecast of increase in consumption levels across all categories within the dairy sector. ▪ Niche opportunities in the cheese sector for reasonably priced, soft cheeses. 	<ul style="list-style-type: none"> • High competition from domestic producers who promote heavily, as well as foreign manufacturers, depending on the product. • Attractively priced private label products are an emerging threat.

5.2.2 Consumption

5.2.2.1 Evolution of consumption

Drinking milk products, despite falls in consumption of 4.3% per year, remain by far the biggest category on the Colombian dairy market. The second biggest category – yoghurts and sour milk products – have nearly four times smaller market size with regards to retail value. Like drinking milk products, this category noted a negative CAGR of 1.5% per year between 2013 and 2018. Cheese is the only category in which consumption picked up over the period 2013-2018, by 1.7% per year. Lastly, other dairy products consumption (such as desserts, coffee whiteners or condensed milk products) remained relatively stable, whereas consumption of butter and spreads declined by 1.7% per year.

Figure 5-4: Evolution and forecast of dairy market (000 tonnes) in Colombia, 2013-2023; retail value



Source: Euromonitor International: Packaged Food, 2019.

5.2.2.2 Consumer profile and purchase criteria

Consumers

Dairy constitutes a substantial part of Colombian diet. Notably, consumers in Colombia tend to consume drinkable dairy products⁴⁶ (i.e. drinking milk) as well as cheese, which is often seen as a snack as well as a side dish. Due to abundance of different types of products within the dairy sector, it is useful to differentiate consumer groups in relation to a way of consuming dairy:

- **Drinking milk products:** Fresh milk is considered as a staple and has positive and healthy image. It should be pointed out that in Colombia there is a high rate of informal sales, which effectively causes quality and prices distortion.⁴⁷ However, recently consumers shift towards milk alternatives, such as almond milk or coconut milk, which are often targeted in media campaigns and considered natural and bringing health-added value.
- **Yoghurts:** These products are well-regarded and eaten mostly as a snack or quick breakfast. Colombians tend to choose traditional yoghurts rather than innovative flavours. Lately, there has been an increase in using yoghurts as an added-value ingredient for sweet biscuits, breakfast cereals and even jellies. The spoonable varieties of yoghurts have started to receive greater attention.
- **Cheese:** Cheese is widely consumed by Colombians, very often at breakfast. The average consumption of cheese in Colombia is around 1.5 kgs per person per year. This rate increases in the Department of Antioquia, with its capital Medellín, to almost 5 kgs per person per year, where

⁴⁶ Per capita consumption is 140 litres/person - https://www.investincolombia.com.co/images/Adjuntos/DAIRY_SECTOR_2016.pdf

⁴⁷ Euromonitor International: Economies and Consumers, 2019.

cheese is part of all three meals of the day. In Colombia as a whole, 1 out of 3 women eat cheese with any meal, whereas 71% of men eat cheese only at breakfast. Consumers have a strong preference for soft cheeses. The market offers vast variety of these, especially in the category of *quesos hilados* (spun cheeses), which are one of the most popular types in the country. As with drinking milk products, there is a high level of informal sales of unbranded products, which mostly include soft cheese types, such as Campesino and spun cheeses. Lastly, hard cheese is considered as an expensive product for many consumers.

- **Butter and margarine:** Margarine, which dominates the market, is seen as more affordable option than butter. However, Colombians across socioeconomic groups use margarine with bread and arepa⁴⁸. In recent years, due to raise of health-awareness, butter has been criticised for fat content.
- **Other dairy:** Both chilled and shelf stable desserts have not been particularly popular. Colombians tend to choose fresh versions in retail and foodservice. Only yoghurt-like desserts receive attention from consumers, while condensed milk struggles to build a solid consumer base, due to healthy trends.

Further differences in consumption patterns of dairy products as a whole are as follows:

- **Income:** The consumption of milk per person in Colombia is 198 liters per year for high-income groups. This amount reduces to 107 liters for middle-income groups and to 42 liters for low-income groups.
- **Gender:** There are campaigns by governmental entities and sectorial associations to promote dairy consumption among pregnant and lactating women. For instance, Colombian Institute of Family Wellbeing gives away free milk to pregnant and lactating women. In addition, there is growing awareness about the nutritional benefits of dairy products to improve bone health especially in women.
- **Age:** There are no consolidated studies about the purchase and consumption patterns of dairy products according to age in Colombia, either. However, according to a survey conducted by the Yanhaas market research agency for Grupo Éxito in 2017, the age group from 2 to 3 had the highest rate of dairy consumption with 86%, and the age group from 51 to 74 had the lowest rate with 70%. The same study also indicated that consumers between the age of 35 and 55 prefer savory tastes and younger consumers prefer sweeter tastes in cheese. Nevertheless, there are campaigns by governmental entities and sectorial associations including the National Federation of Cattle Ranchers to promote dairy consumption among children especially from the most vulnerable sections of the society, due to their health benefits for this group.
- **Expatriation:** There were almost 1 million foreigners that resided in Colombia as of the end of 2018. One third of this population was from Venezuela, followed by the USA (4.863), Ecuador (2.499), Spain (2.348) and Chile (1.299). These expat groups tend to look for dairy products, especially cheese, either from their country of origin or in varieties with as similar a taste as possible.

⁴⁸ Euromonitor International: Economies and Consumers, 2019.

Drivers and method of consumption

As mentioned above, Colombians in vast majority consume dairy as a beverage, especially fresh raw milk, which is treated as a daily staple. Moreover, increasing health awareness and a positive image of dairy products have impacted consumption levels of certain products, such as butter. Cheeses, on the other hand, are perceived as a snack and/or a side dish and consumers have a strong preference for soft types of cheese.

Local players dominate the Colombian dairy market, while sales of imported products are limited. Some of the EU dairy products which are popular and present in the Colombian market, include Spanish, French and Italian cheese. Greek style yoghurt is popular, but tends to be locally produced. In general, EU dairy products, especially cheeses, are considered premium high quality, available and affordable by the high-income class consumers in Colombia.

Purchase criteria

As noted above, consumers of dairy vary to some extent both between products and between different groups of the population; and this inevitably affects purchase criteria to some extent. As a general rule it should be remembered that the majority of dairy is locally produced, so consumers are used to local production; indeed an estimated 40% of dairy is estimated to be informally produced and hence sold as unbranded products. These are often cheaper than branded products, and given that Colombian consumers tend to be price-sensitive – lower income ones in particular – this is a particular attraction of unbranded products. Indeed, the price sensitivity of Colombian consumers is likely to influence the purchasing decision for many dairy products. Furthermore, drinking milk is considered a staple, and fresh products are generally preferred, which tends to favour local production and distribution.

Domestic companies selling branded products tend to advertise their products (with the aim of ultimately increasing sales) on the basis of the criteria below. Advertisements tend to either include, or target three groups: women, children and families.

- **Health benefits:** the nutritional value of ingredients is generally highlighted in advertising, emphasizing the importance of calcium for bone health, protein for muscle strength and probiotics for digestion. Vitamin-fortified dairy products are promoted for their quality of strengthening the body's defence system and preventing illnesses like the common cold.
- **Convenience:** The snack versions of dairy products like cheese and yoghurt are advertised for their ease of consumption, as they can be carried in personal bags and consumed at any place and any time of the day. Packaging of some domestically produced dairy products is specifically designed for convenience.
- **Reduced-fat or reduced-sugar:** for example, Alpina has launched advertisements to promote its Finesse brand that comes with low-fat and low-sugar cheese and yoghurt varieties.

Purchase criteria relevant specifically to imported cheese are as follow:

- **Flavour:** Milder tastes of cheese such as Emmental and Leicester are preferred over stronger tastes.
- **Texture:** Soft and semi-hard textures including Gouda, Havarti, Mozzarella and Manchego, which are regarded as daily breakfast additions, are more preferred than hard textures.

- **Milk type:** The best-sold varieties of imported cheese are made of cow milk, followed by varieties made of goat and buffalo milk. Varieties with sheep milk come last in the order of preference.
- **Country of origin:** Imported cheese from the Netherlands, Spain, France and Italy are the most popular and sort for.
- **Price:** Imported cheese is more expensive than the local cheese, therefore it appeals more to the upper-middle and high-income groups. Nonetheless, these may still be price-sensitive. There are price differences among imported cheese varieties, and this may affect the purchasing decision. For example, the Dutch Gouda is priced around EUR 14 per kilo, whereas the Swiss Emmental is sold for about EUR 40 per kilo, in the delicatessen shop Cava de Quesos. The mid-price varieties of imported cheese are generally more popular.

Dairy products on Colombian retailers' shelves...

In Colombia, Spanish, Italian, French, and Dutch dairy products are predominant among imported EU products. EU GIs, such as Spanish Manchego can be easily found on the shelves of Colombian retailers; however, some cheeses which could be considered to imitate GIs protected in the EU can also be found.



Regarding prices, the majority of imported cheeses are priced for the mid-range, and will retail in the range of COP 4 600 – 12 700 (i.e. EUR 1.20-3.20) per 100g. Some products can be found at prices

below this targeting the more economy segment (e.g. some a type of emmental) or above this targeting the premium segment (e.g. certain types of camembert or goat's cheese).



Imported cheeses are often grouped together on the shelves of retailers, separate from Colombian cheeses, and sorted more by style of cheese than by origin.

Packages containing cuts of different types of cheese are also available to prepare snacks and sandwiches. Options marketed as gluten-free are may also be found on Colombian shelves; and some packages of cheese also report that the product is antibiotic-free.

5.2.2.3 Recent market trends

As presented in Figure 5-4, all categories of dairy are expected to increase their market size after slow or negative recent growth for several categories. Cheese is predicted to note the greatest growth, amounting to 3.8% per year in years 2018 -2023 in terms of retail value. Drinking milk products are forecast to note the lowest growth of 2.0% per year in over the period.

Several strategies are being used to reactive or boost sales by producers, and it is expected their use will continue in the next couple of years:

- **Innovation:** new ingredients or product launches combined with packaging and positioning remained key to category growth for dairy products in Colombia. Examples of recent innovative launches include the ultra-filtered, high-protein Actilife "super milk" launched by Alpina in 2017 , and Alqueria Mas, fortified milk launched in 2018.
- **Health and wellness:** An important part of innovation is focused on reduced-fat, reduced-sugar or lactose-free products, as their popularity has been increasing in recent years. The varieties within the Finesse line of company Alpina cover light versions of: dairy-based drinks with different flavours like oat and fruits; block cheese; sliced cheese; cream cheese; snack cheese; heavy cream; and Greek yoghurt. Colanta also has been diversifying its offer with light versions of fruit-flavoured yoghurt, block cheese, cream cheese and ricotta cheese.
- **Publicity:** Dairy producers are making an important effort to increase their sales through advertisements. In a recent example, Colanta has installed big-scale models of the real package of its new yoghurt product, Neuvo with buffalo milk in the baggage claim area of the arrival terminal of the International El Dorado Airport in Bogota. Dairy producers have also launched advertisements with some famous sports figures from Colombia, like Alpina with football player Radamel Falcao, and athlete Catherine Ibarguen, and Colanta with cyclist Rigoberto Uran.
- **Private labels:** Although major brands are trying to de-commoditise the category with appealing innovations, milk remains a basic category, in which value for money alternatives, such as those offered by private label, are becoming increasingly attractive to consumers. Products from discount stores, like Latti from D1, are rapidly growing thanks to their value for money proposition.

There has also been some recent interest in conveniently packaged products in a few categories.

5.2.3 Offer

5.2.3.1 Domestic production

Domestic production of dairy products, especially milk production, in Colombia is substantial and considered the fourth largest in Latin America, with an approximate volume of 6.6 billion litres per year⁴⁹.

⁴⁹ The industry of dairy products in Colombia; <http://www.procolombia.co/compradores/en/explore-business-opportunities/industry-dairy-products>

The dairy industry is seen as one of the main pillars of the national economy, supporting over 700 000 direct jobs⁵⁰. Domestic producers account for approximately 97% of the country's demand. However, Colombian production mostly includes raw fresh milk, rather than cheeses and/or other categories.

The availability of different kinds of milk products differs from region to region, however production is mainly spread across the Western parts of the country⁵¹. Alpina Productos Alimenticios and Cooperativa Lechera Colanta lead the market, nevertheless the presence of other companies is dependent on the region, e.g. Colanta Ltda., Parmalat, Alqueria. It should be noted that a high level of informal production in Colombia- which accounts for as much as 40% of all dairy products – is believed to take place. This production is boosted by its lower price and the fact it can be produced in a neighbourhood and distributed through nearby small, independent grocers.

In general terms, Colombian dairy farms put emphasis on technological progress, adapting new techniques and methodical measures in the area of hygiene, animal health as well as improvement of efficiency maximising production⁵².

5.2.3.2 Imports and exports

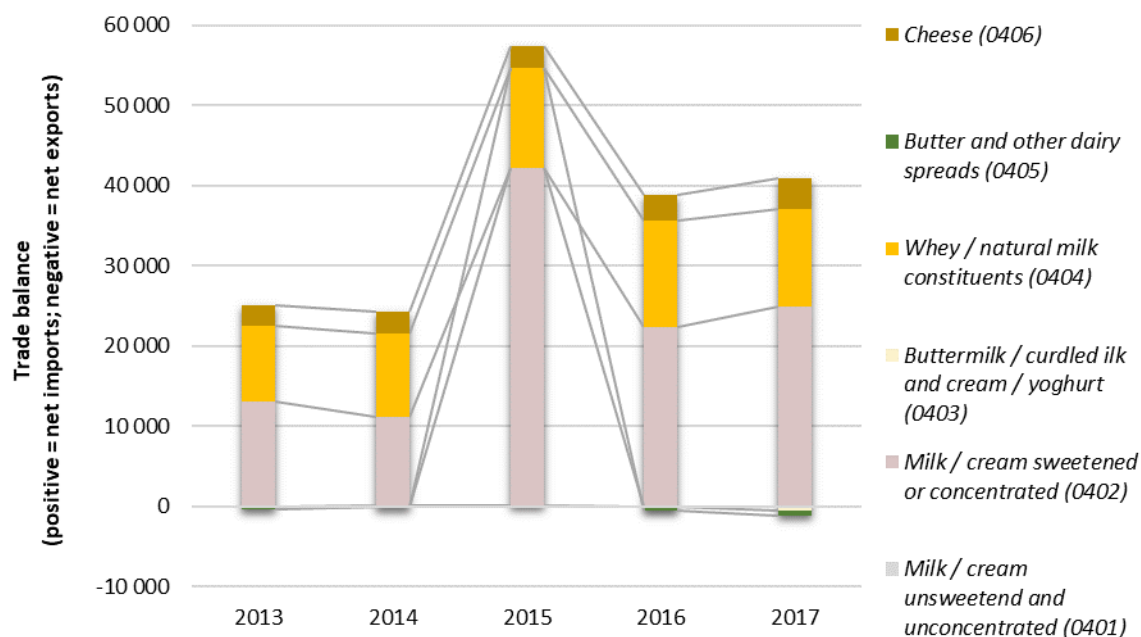
Colombia is a net importer of dairy products, with marginal quantities exported. As presented in Figure 5-5, milk/cream sweetened or concentrated constitutes the largest share of Colombian dairy imports ; imports however have been fluctuating, with significant increase in 2015, and amounted to almost 25 000 tonnes in 2017. The second biggest imported dairy product is whey/other natural milk constituents, which have noted a slight decrease in years 2015-2017. Imports of cheese have gone up in years 2013-2017, noting a slight growth.

⁵⁰ Dairy in Colombia; <https://www.investincolombia.com.co/sectors/agribusiness/dairy-sector.html>

⁵¹ Investment in the dairy sector; <https://www.slideshare.net/pasante/dairy-sector-2016>

⁵² Colombian dairy farm goes high tech, ups production; <https://www.efe.com/efe/english/business/colombian-dairy-farm-goes-high-tech-ups-production/50000265-3941321#>

Figure 5-5: Trade balance (imports and exports) of dairy in Colombia, 2014-18; tonnes



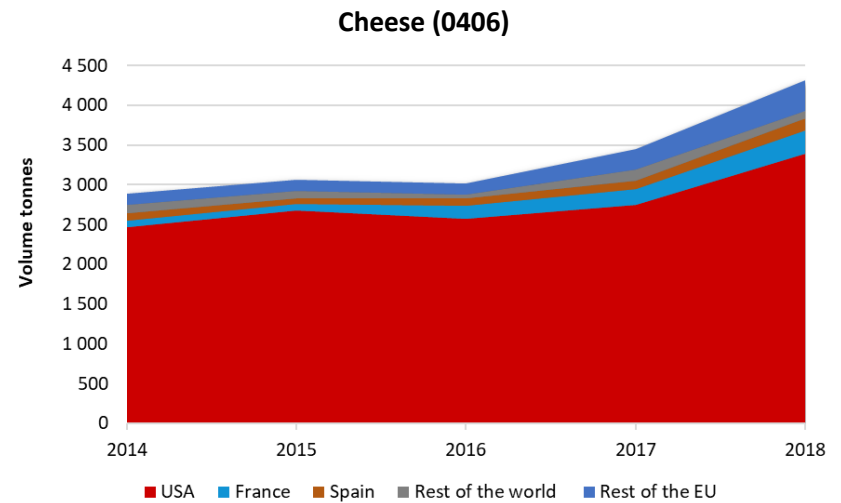
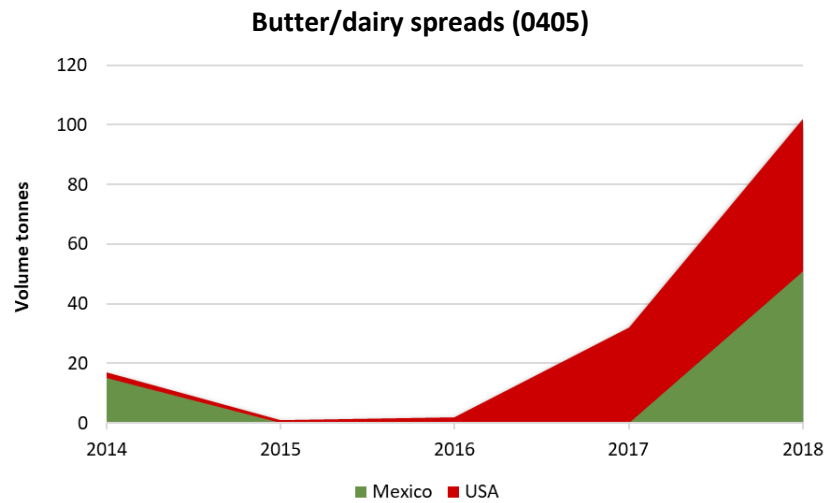
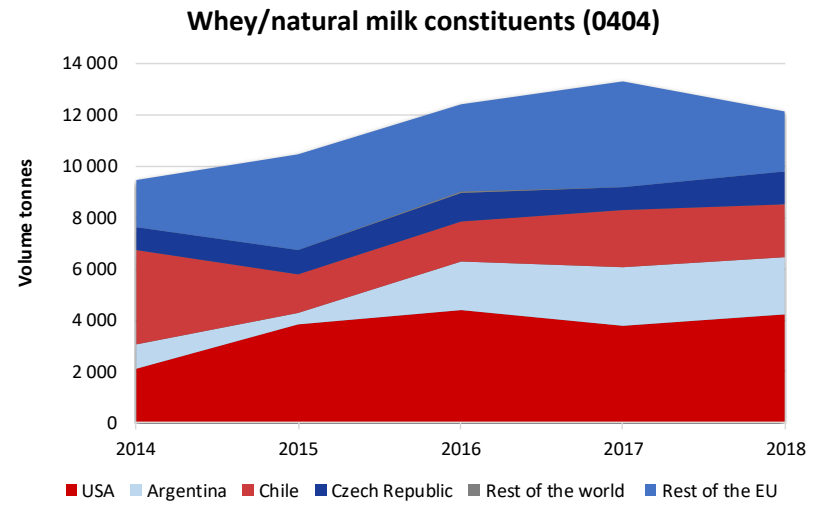
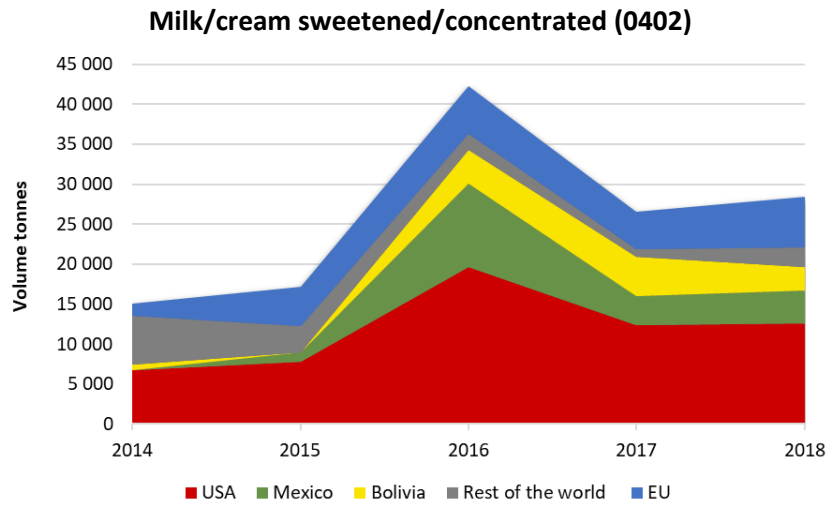
Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
CN codes in brackets.

Dairy products have been predominantly imported to Colombia from USA, which is a major importer across the different dairy categories. However, imports of categories other than cheese are diversified and involve several countries, such as: Mexico in milk/cream sweetened or concentrated and butter sectors; Argentina in whey/natural milk constituents; and Bolivia in milk/cream sweetened or concentrated. Considering EU exporters, they are the most active in whey/natural milk constituents; countries such as Czech Republic, France and Poland export considerable quantities of this product. Similarly, in the case of milk/cream sweetened or concentrated major EU exporters include Poland, France and Spain among others.

As Figure 5-6 shows, imports of milk/cream sweetened or concentrated reached their peak in 2016, amounting to almost 60 000 tonnes. In general terms, the imported volume has fluctuated over the years, to slightly pick up in 2018. Considering imports of whey/natural milk constituents, the volume has increased gradually in years 2013-2017 before a slight decline in 2018. Cheese imports, dominated by the USA, noted a steady growth between 2013-2018 and reached over 4 000 tonnes imported in 2018. Butter and dairy spreads, on the other hand, were virtually nil in 2017 and rose to almost 100 tonnes in 2018.

Market Entry Handbook

Figure 5-6: Colombian imports of different dairy categories by country, 2014-18; tonnes



Note: The volume of imported milk/cream unsweetened (CN code 0401) was 45 tonnes, of which 44 were shipped from the USA.

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
 CN codes in brackets.

5.2.3.3 EU GI products

As reported in section 9, under the EU-Colombia and Peru Trade Agreement, several products are set recognised as Geographical Indications in Colombia, including some dairy products:

- Denmark: Danabulu (cheese)
- France:
 - Brie de Meeaux (cheese)
 - Camembert de Normandie (cheese)
 - Comté (cheese)
 - Emmental de Savoie (cheese)
 - Reblochon (cheese)
 - Roquefort (cheese)
- Greece: Feta
- Italy:
 - Gorgonzola (cheese)
 - Grana Padano (cheese)
 - Provolone Valpadana (cheese)
 - Parmigiano Reggiano (cheese)
 - Taleggio (cheese)
- Portugal:
 - Queijo de São Jorge (cheese)
- Spain : Idiazábal (cheese)

5.2.3.4 Main competitors

As mentioned in section 5.2.3.1, the Colombian dairy industry heavily relies on domestic production, especially in the category of raw fresh milk. Major competitors include Alpina Productos Alimenticios and Cooperativa Lechera Colanta among others. It should be also pointed out that Colombian imports are largely based on USA products.

5.2.4 Specific market entry requirements

Market Access and Entry

As described in section 4.2.1, European producers should register their products with the INVIMA and MINICOMEX⁵³. Furthermore, products must comply with the Law 9 of 1979 on imports of food products, (see section 4.2.2). Producers should be also mindful of other necessary documentation (detailed Table 4-2), such as:

- Certificate of analysis,
- Sanitary Registration of Foodstuffs,

⁵³ In accordance with Decree 3075/1977, the following products are not subject to registration: (a) non-transformed chilled and frozen animal-origin food products, (b) non-transformed natural food products, and (c) raw materials for food preparation.

- Veterinary Health Certificate for Animal Products,
- Zoosanitary Import Permit.

Detailed information on import duties and Rules of Origin can be consulted on the European

Commission website:

https://madb.europa.eu/madb/datasetPreviewFormATpubli.htm?datacat_id=AT&from=publi&hsc_ode=0402&countryid=CO

Customs procedures

A list of standard documents required for imported dairy products in Colombia is presented in section 4.2.1

Any other up to date information on appropriate documents concerning customs procedures can be consulted on European Commission website:

https://madb.europa.eu/madb/datasetPreviewFormATpubli.htm?datacat_id=AT&from=publi&hsc_ode=0402&countryid=CO

SPS measures

All sanitary and Phytosanitary measures concerning the import of are in line with international standards. It should be pointed out though that additional documentation might be required (as per Table 4-2).

Up to date information on appropriate documents concerning SPS measures:

https://madb.europa.eu/madb/datasetPreviewFormATpubli.htm?datacat_id=AT&from=publi&hsc_ode=0402&countryid=CO

Labelling

As described in more detail in section 4.2.3, all imported dairy products must be labelled in line with:

- Regulation in terms of labels or labels requirements (Resolution 5109 of 2005).
- Requirements for labelling or labels regarding additives (Resolution 1506 of 2011).

5.2.5 Distribution

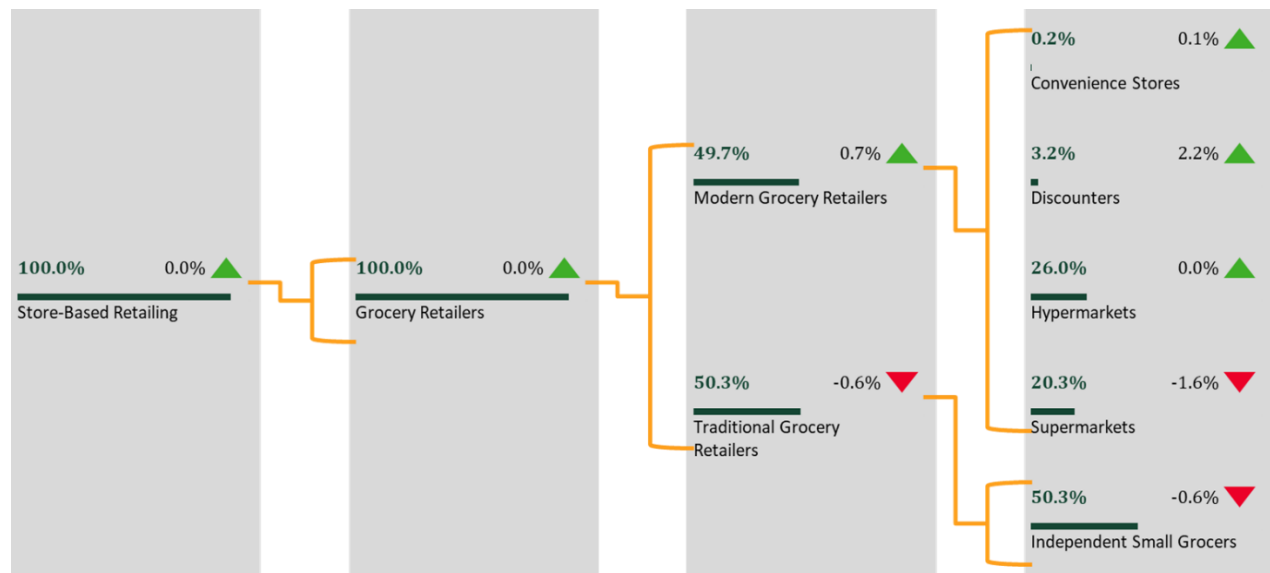
As presented in Figure 5-7, dairy products in Colombia are mainly distributed through three channels: independent small grocers, hypermarkets and supermarkets. It should be noted that within the retail sector, independent small grocers generally sell unbranded products. Over half of products (50.3%) are distributed through such entities – especially fresh raw milk and soft cheeses. As already noted, this is largely due to the manufacture and commercialization of unbranded products sold through these channels; a practice itself driven by the cheap prices of these informal alternatives compared to the formal ones. In addition, the majority of the population, especially in the lower income neighbourhoods, tend to buy groceries more than once a week for immediate consumption. They also prefer fresh products, which travels as little a distance as possible from the farm to the table. Furthermore, there is the business logic

from the point of view of the small local producer, who finds it easier to supply his products to independent small grocers than to big retailers.

Hypermarkets (26%) as well as supermarkets (20.3%) constitute an important retail channel for branded products across the categories within the dairy sector.

Nonetheless, EU dairy products, especially cheeses can be found only in hypermarkets like Pricesmart, supermarkets like Carulla, Jumbo and Exito, or in specialized delicatessen shops like Cava de Queso.

Figure 5-7: Distribution channel overview of dairy in Colombia (2018); all dairy products; retail value



Source: Euromonitor International: Packaged Food, 2019.

5.2.6 Challenges for EU products

The greatest challenge for EU dairy manufacturers is strong competition from domestic manufacturers as well as reliance on several importing countries in certain sectors (e.g. cheese). The second possible obstacle that EU dairy manufacturers may face is consumers' price sensitiveness, which significantly impacts the purchase approach – for this reason hard cheese, which is more expensive in Colombia, has not build a solid consumer base yet.

Market Takeaway: Dairy

Consumption: Consumption of dairy products mainly relies on drinking milk products; however Colombian consumers are familiar with several types of cheeses and have a strong preference towards soft types. Whereas all categories have recently noted a decrease in consumption levels (except cheese), the dairy sector is predicted to pick up in next years.

Competition: the drinking milk products market is dominated by domestic players, whereas the cheese market is a combination of both importers (notably the USA) as well as domestic manufacturers.

Distribution: Half of products are being distributed through independent grocers, which often include informal sales of unbranded products (mostly drinking milk products and soft type of cheese). Hypermarkets and supermarkets account almost for the other half of distribution channel, selling branded products.

Challenges: High competition both from domestic manufactures as well as foreign importers, depending on the product. Moreover, high percentage of informal independent grocers in the distribution channel. Lastly, price-sensitiveness of consumers which impacts purchasing approach.

Opportunities: Healthy image of dairy products as such. Familiarity with dairy products among Colombian consumers.

5.3 Wine

5.3.1 SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ Over the last decade, total consumption of wine has recorded a dramatical average increase. ▪ Do to the low volumes produced in Colombia, domestic wine consumption relies on imports. ▪ EU countries are amongst top exporters of wine to Colombia. ▪ Under the EU-Andean FTA, EU companies enjoy duty-free access to the Colombian wine market. 	<ul style="list-style-type: none"> ▪ Due to the new tax scheme, consumption has barely increased over the last year. ▪ Per capita consumption is set to stagnate over the next years. ▪ Unlike beer, wine is perceived as a drink for special occasions and family gatherings. ▪ Price has been a key factor in purchasing decision, since 2017.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ Women have a taste for sparkling and white wines. ▪ Luxury tourists and affluent Colombians drive the sales of premium wines. ▪ Colombians consider European wines high-quality products. ▪ Health-conscious consumers are more likely to replace beer and spirits with wine. ▪ Low-priced wines' sales are on the rise. 	<ul style="list-style-type: none"> • EU producers face the fierce competition of Chile and Argentina, which offer broad range of price ranges. • While still insignificant, domestic production is very dynamic. • Red tape is a problematic market access issue in the wine sector, and with administrative changes, import is increasingly handled by large distributors only.

5.3.2 Consumption

5.3.2.1 Evolution of consumption

Over the last decade, Colombia has recorded rising wine consumption trends, thanks to the efforts of importers, retailers and restaurants, which brought several new varieties on the local market. However, **since 2017 the sector has been suffering from the impact of Law 1816/16** (see box below). As a consequence of the new tax scheme, mid and high-priced wines recorded negative performances. On the contrary, sales of cheaper products displayed rapid growth. This subsequently led to a focus on price, with retailers offering a wider choice of low-priced wines, to face the competition from wines in discounters.

Law 1816/2016

Until 2016, EU alcoholic beverages were subject to higher taxes and charges than local products. This was in contravention of WTO rules and the EU-Andean FTA provisions. Therefore, the Colombian Congress issued the Law 1816 in December 2016, to bring Colombia into compliance with its trade commitments under the WTO and trade agreement with the EU. Indeed, this Law aims to remove the discriminatory tax system as well as the anti-competitive practices conducted by local alcoholic beverages producers. Therefore, the applicable tariff for consumption **tax for wine** is set at COP 150 (about **EUR 0.04**) **for each alcoholometric degree** in unit of 750 cubic centimeters or equivalent, plus **an ad valorem tariff of 20% on the sale price**. Additionally, wine is subject to Value Added Tax (**VAT**) at a special rate of **5%**. However, the Law also prevents the government from creating introducing trade barriers and discriminatory practices to the disadvantage of importers.⁵⁴

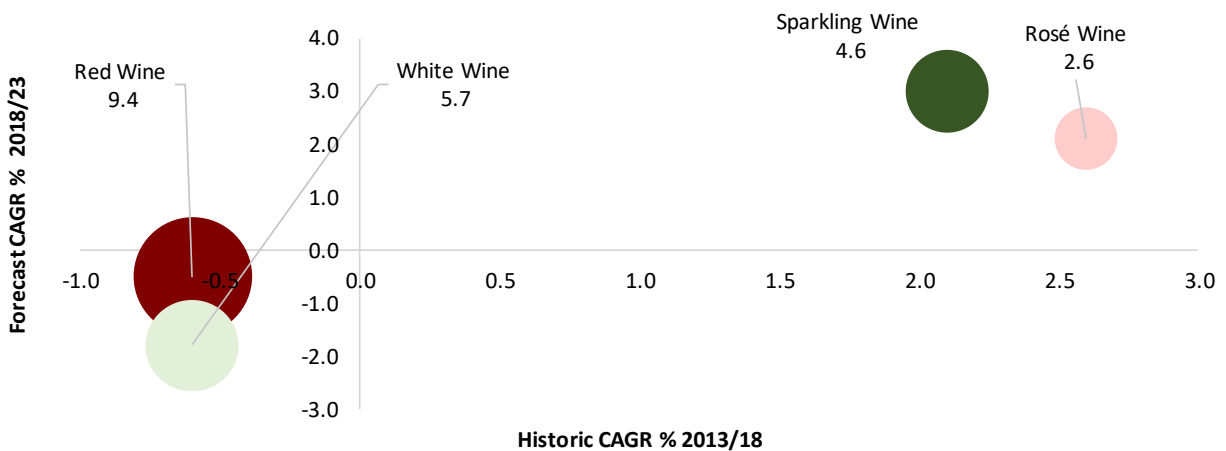
Against this background, unlike the previous years, **total consumption of wine barely increased between 2013 and 2018**, as the new tax scheme discouraged sales and motivated a shift towards affordable beer. Within the category, increasing consumption amongst women drove **higher sales of rosé and sparkling varieties**, which increased by respectively 2.6% and 2.1% per year (Figure 5-8). On the contrary, red and white wine consumption declined by 0.6%. Despite their negative market performance, red and white wines remained the most popular wine varieties in Colombia in 2018, with sales volume of 9.4 and 5.7 million litres respectively. However, total consumption within other categories of wine was also relatively high, amounting to 4.6 (sparkling wine) and 2.6 (rosé) million litres.

Per capita consumption of wine, which is minimal compared to the regional average, is expected to remain broadly stable at 0.7 litres over the next few years.⁵⁵

⁵⁴ Colombian Congress issued a law that eliminates the discriminatory tax system between imported and domestic alcoholic beverages, <https://www.elanbiz.org/colombian-congress-issued-a-law-that-eliminates-the-discriminatory-tax-system-between-imported-and-domestic-alcoholic-beverages>

⁵⁵ Euromonitor International: Alcoholic drinks, 2019

Figure 5-8: Evolution and forecast of wine market (million litres) in Colombia, 2013-2023; total volume



Source: Euromonitor International: Alcoholic Drinks, 2019.

5.3.2.2 Consumer profile and purchase criteria

While Colombia is traditionally a country of beer consumers, over the past decade the wine market has shown promising growth. However, in recent years, following the introduction of a new tax regime and the economic uncertainty, consumers have started placing an increasing importance on price, giving up on more expensive and high-quality wines.

Wines tend to have a wider consumer base compared to other alcoholic drinks, with women and older consumers being especially important groups. One important characteristic of wine consumption is that it is usually consumed in more quiet environments, while spirits and beer are usually a common drink at parties and for that reason are more popular among younger people. However, while the consumer base for wine is wider, the frequency of consumption is considerably lower than other alcoholic drinks.

Consumers

Although wine has been historically considered a drink exclusive to the upper middle and upper classes of the Colombian society (who are affluent consumers), with the introduction of lower priced wines into the market, its consumption has **extended to the lower middle classes in recent years as well**; and low-priced wine is also becoming particularly trendy amongst young people.

The average wine consumer in Colombia is between the ages of 23 and 45; Generation X (namely those born between 1960 and 1980) accounts for 42% of total wine sales, followed by millennials (29%), whose consumption is growing. They are likely to have a professional with a college degree or a higher level of education, and most likely to live in Bogotá. The average consumer was more likely to be a man than a woman until a few years ago, but it is considered that this gap has been closing lately. **Women have indeed recently become an important segment of wine consumption**; they usually have a preference for white, rosé and sparkling varieties, due to their taste and the perception of these products as “healthier”.

Women tend to purchase wine regardless of the occasion, while men prefer to drink wine to accompany meals.

In terms of key geographical targets, as noted above, wine **demand is higher in large cities** such as Bogotá (where 80% of total wine sales takes place in the country) and Medellín. In addition, there are tourist markets, such as Cartagena, where luxury tourists drive sales of premium wines.

In terms of general consumption, the preference of wine is in the order of red, white and rose. The average Colombian consumer likes easy-to-drink wines that come with a sweeter and fruitier taste, fuller body and less acidity. Women typically prefer white, rose and sparkling wine, whereas men prefer potent and structured wines. Light bodied wines are popular with younger consumers while senior consumers tend towards fuller bodied, premium wines. Amongst the varieties preferred by these consumers there are Cabernet Sauvignon, Merlot, Malbec (red wines), as well as Sauvignon Blanc and Chardonnay (white wines). The latter are widely distributed at local off-trade channels. In general, more **sophisticated and affluent consumers are aware of and appreciate European wines**, which are considered high quality. There is a small group of wine connoisseurs that can be found in cities with a population of over one million (like Bogotá, Medellín, Cali, Barranquilla and Cartagena) who are particularly likely to appreciate European wines. They are, on average, economically successful males between the ages of 35 and 65, with a college degree or a higher level of education. However, the average consumer is more likely to opt for Chilean products, which are more widely available and are usually offered at lower prices.⁵⁶⁵⁷⁵⁸

Drivers and method of consumption



French, Italian, Portuguese and Spanish wines on the shelves of a gourmet Colombian retailer.
© Agra CEAS / Euromonitor International, 2019.

Unlike beer, which is consumed very often with daily meals, **wine is rather associated to celebrations and special occasions**. Colombians usually purchase wine bottles imported from Latin America and European countries, which are perceived as fine products. As illustrated in the image on the left, EU wines can indeed be found on the shelves of domestic retailers. Notably, there are three important periods when wine consumption peaks:

- The first and most significant time is December, a period marked by social gatherings such as Christmas and New Year lunches, dinners and parties among co-workers, friends and family. Wine is widely consumed in these gatherings.

⁵⁶ “Queremos hacer un vino autóctono, 100% colombiano para el próximo año”, <https://www.larepublica.co/ocio/queremos-hacer-un-vino-autoctono-100-colombiano-para-el-proximo-ano-2560158>

⁵⁷ Análisis del mercado del vino en países de Latinoamérica: COLOMBIA, https://www.tb.camcom.gov.it/uploads/CCIAA/Corsi/Atti/2015_06_23/Market_Analysis_Colombia.pdf

⁵⁸ Advice on exporting wine to Colombia, <https://www.drinks-today.com/wine/analysis/advice-exporting-wine-colombia>

Additionally, Christmas and New Year gift baskets that are offered by companies to their employees or exchanged among friends and families, usually include a bottle of wine. Imported premium wine and champagne are usually given as fine gifts around Christmas time.

- The second occasion is the Day of Love and Friendship, the equivalent of St. Valentine’s Day, which is celebrated in Colombia on the third Saturday of each September. This is a day not only for partners but also for friends and family. Wine is consumed at lunches and dinners at restaurants as well as at home gatherings and is also exchanged as gifts on this occasion.
- Finally, the third significant time is Mother’s Day, celebrated on the second Sunday of each May. Restaurant occupancy levels typically peak on this day and wine is consumed as well as offered as gifts.

Other than these, celebrations like weddings and birthdays are also occasions when wine is consumed widely. In baptisms and first communions, the ceremony at church is usually followed by a lunch in a restaurant or at home among families and friends, where wine is consumed. First communions are usually made in the month of May in Colombia. The highest consumption rates occurs during weekends, when Colombians gather friends and/or family at home. However, women also drink wine (especially sparkling varieties) when dining out or spending evenings with friends (they have a taste for wine-based cocktails too).⁵⁹ Wine is also considered to be a nice gift to take when one is invited to the home of a colleague or a friend.

Despite the wine culture increasing in popularity in Colombia, wine drinking still remains limited to special occasions. Unlike in other Latin American countries, it is fairly uncommon for Colombians to have a glass of wine along with their meals on a regular basis. Moreover, the culture of simply enjoying wine is not as widespread, thus limiting category growth.

Purchase criteria

Following the introduction of Law 1816/16, **price has become a key factor in the purchasing decision**, gaining more importance than all the other criteria, such as quality. Consequently, low-priced wines have benefited from the trading down from mid-priced products and are gaining traction among the mid-income segments. High prices along with the economic slowdown is discouraging wine consumption and even motivating a shift towards beer.

Nonetheless, a second important criterion that shapes purchase decisions is **brand quality**. Well-known brands tend to enjoy strong market share and customer loyalty. Popular brands such as Gato Negro and Santa Rita, which have for several years invested in brand awareness, enjoy considerable advantage over other brands with similar prices. This criterion is particularly important for **wine connoisseurs**, who are however a small niche. This segment also considers **exploration as a key purchase criterion**. Many of them are subscribed to wine clubs that offer the opportunity to try different wines during the year.

⁵⁹ Análisis del mercado del vino en países de Latinoamérica: COLOMBIA, https://www.tb.camcom.gov.it/uploads/CCIAA/Corsi/Atti/2015_06_23/Market_Analysis_Colombia.pdf

Finally, the health-conscious segment is more likely to purchase wines with a lower alcohol content and less calories. This segment usually prefers wine over beer and spirits, as wine is perceived as the “healthiest” option within the alcoholic beverages category. Furthermore, wealthier consumers are more likely to opt for first-class imported wines, as they place great value on quality.

Wine on Colombian retailers' shelves...

The retail price ranges across different segments are as follows in rough terms:

- Economy: between COP\$ 28.000 and 40.000 (EUR 7.26 - 10.37)
- Medium: between COP\$ 40.000 and 80.000 (EUR 10.37 – 20.75)
- Premium: between COP\$ 80.000 and 140.000 (EUR 20.75 – 36.31)
- Super Premium: above COP\$ 140.000 (EUR 36.31)



Bright colour accents are dominant in red wine packaging. Amongst colours used in red wine packaging, there are especially warm colours (orange and yellow for low/mid priced wines and gold for higher quality products).

Prices for a 750 ml bottle of red wine largely vary, ranging from COP\$ 13 950, or about EUR 4.5 (Chilean Gato Negro red wine), up to COP\$ 500 000, or nearly EUR 123 (Spanish Enate red wine) and beyond. In general, after champagne, where prices can be as high as COP\$ 1 709 300, or around EUR 457 (French Dom Perignon rosé), red wines is the most expensive product in the category.



Some imported brands offer colorful 750 ml bottles of wine, offered at the equivalent of about EUR 11 (see above). Certain of these products come with fruit flavours (e.g. strawberry), in line with consumers' tastes.

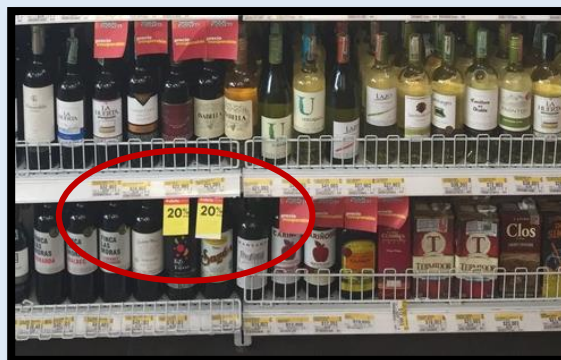
Higher quality white wines are more often sold in coloured bottles. Low priced white wines, on the contrary, are more likely to come in clear or light colored bottle. The higher priced products are often placed at eyeline level and the lower priced products on bottom shelves.

Prices for a 750 ml bottle of white wine largely vary, ranging from COP\$ 13 950, or EUR 3.6 (Spanish Don Simón brand), up to COP\$ 121 700, or EUR 34 (Italian Prosecco Mionetto brand) and beyond. In general, in white and rosé wines it is easier to find good deals.



Although bottles of wine usually come in a 750 ml size, it is not unusual to find 187 ml bottles. Low priced wines are also available in Tetra Pak packages.

Certain retailers offer sales promotions on imported products, such as three or four for the price of two (image on the left), or discounts (image below).



Pictures: © Agra CEAS / Euromonitor International, 2019.

5.3.2.3 Recent market trends

Given that the wine culture is slowly spreading in Colombia, wine purchases are circumscribed, but showing potential growth. Over the next few years, wine sales are indeed expected to increase at a higher rate compared to the previous period (2013-18). However, this increase is set to be driven by **expansion in sparkling and rosé wine**, which are respectively expected to grow at an annual rate of 3.0% and 2.1%. Red wine growth, on the contrary, will continue to be negative. Similarly, white wine sales are expected to drop by -1.8% per year.⁶⁰

5.3.3 Offer

5.3.3.1 Domestic production

As outlined in Table 5-1, in Colombia, **domestic production** of grape wine is **currently limited** (it reached about 2.2 million litres in 2017), **but vibrant**. Production is concentrated in the departments of Santander, Boyacá and Valle del Cauca, where climatic conditions are favourable for wine grape growing. In 2017, there were 2 703 hectares of vineyards in Colombia. One of the biggest producers in Colombia is *Grajales* in the Department of Valle del Cauca, which has six million bottles/year of local wine production capacity

⁶⁰ Euromonitor International: Alcoholic drinks, 2019

and more than 900 hectares of vineyards. In Villa de Leyva (Boyacá) are located other large vineyards, such as Winery Ain Karim, which produces around 50 000 bottles of wine per year. Their famous “*Marqués de Villa de Leyva*” is the Colombian wine with the highest international recognition.^{61 62} Finally, Sicilia, in the Department of Antioquia, is a boutique grower and producer that sold about 4 000 bottles in 2018.

Table 5-1: Wine production volume and value, 2017

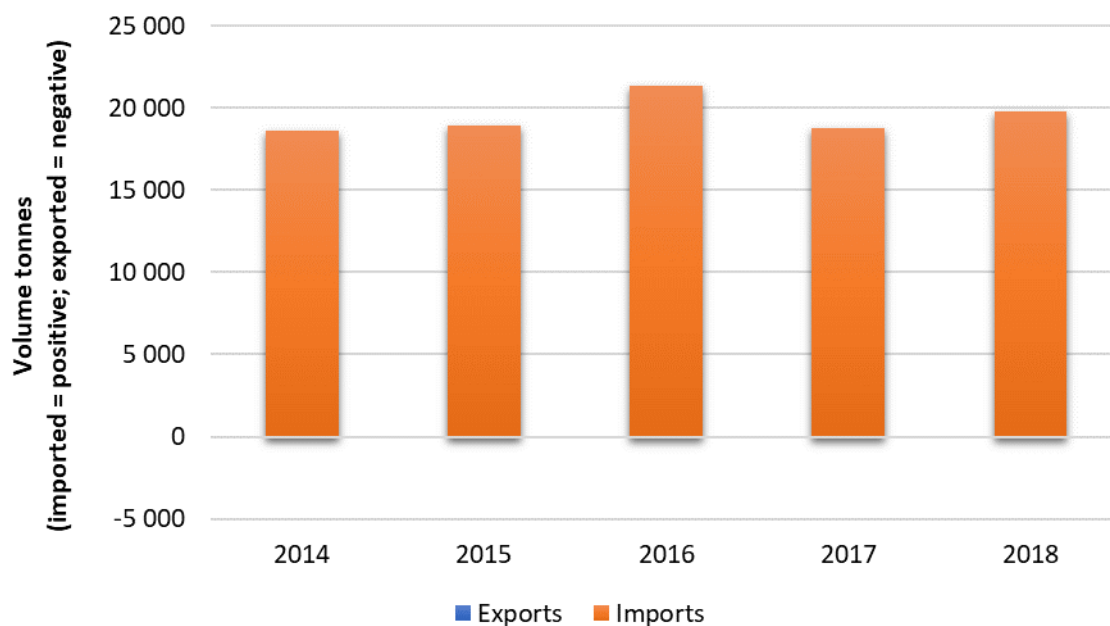
Product	Volume, litres	Value, 000 EUR
Fruit (except grape) wine	7 217 193	8 893
Grape wine	2 176 624	4 490
Sparkling wine	1 666 803	2 999
Total wine	11 060 620	16 382

Source: Agra CEAS based on DANE figures.

5.3.3.2 Imports and exports

Do to the low volumes produced in Colombia, domestic **wine consumption essentially relies on imports**. Imports have fluctuated in recent years, peaking in 2016 and 2018, when they exceeded 19 000 tonnes (Figure 5-9).

Figure 5-9: Trade balance (imports and exports) of wine in Colombia, 2014-18; tonnes



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN code 2204.

⁶¹ Conoce la ruta del vino en Colombia, <http://www.vivircarulla.com/vivir-disfrutando-content/rutadelvino>

⁶² Stay a Little Longer – Villa de Leyva, Colombia, <https://trans-americas.com/villa-de-leyva-colombia/>

Colombia mostly imports wine from Chile and Argentina, which benefit of favourable market entry access conditions (i.e. absence of customs fees), under existing free trade agreements as well as geographical proximity. Furthermore, these countries offer a broad range of varieties and price ranges which are suitable for different groups of consumers. With 10 776 tonnes in 2018 (or 54% of the total Colombian imports in terms of volume), Chile was the leading importer of wine into Colombia, followed by Argentina (2 979 tonnes, or 15%). With 2 884 tonnes, which account for 14.6% of all Colombian imports, Spain was the third largest trader of wine in the Latin American country. Notably, **Spanish wines have been increasing their presence in retailers**, supported by an offer of young wines with an attractive price-quality ratio. **Italian and French wines are also popular**, each accounting for nearly 5% of total imported volume, in 2018. The rest of the EU accounted for the remaining 2% of total Colombian imports of wine by volume, 80% of which were Portuguese exports (

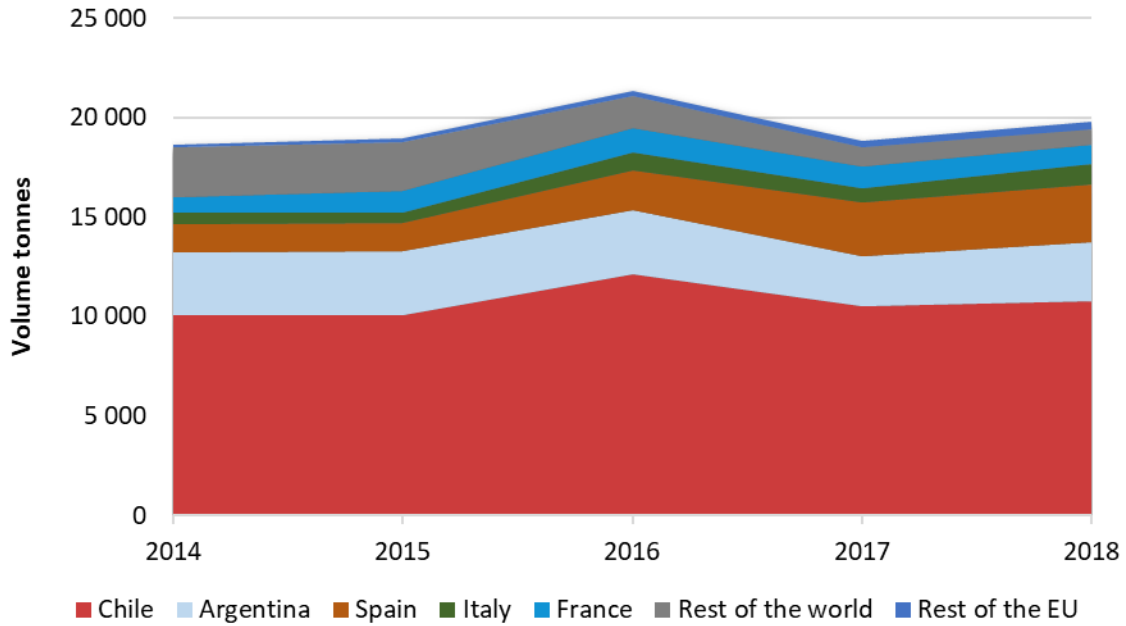
Figure 5-10).



Spanish bottles of wine at a gourmet retailer.
© Agra CEAS / Euromonitor International, 2019.

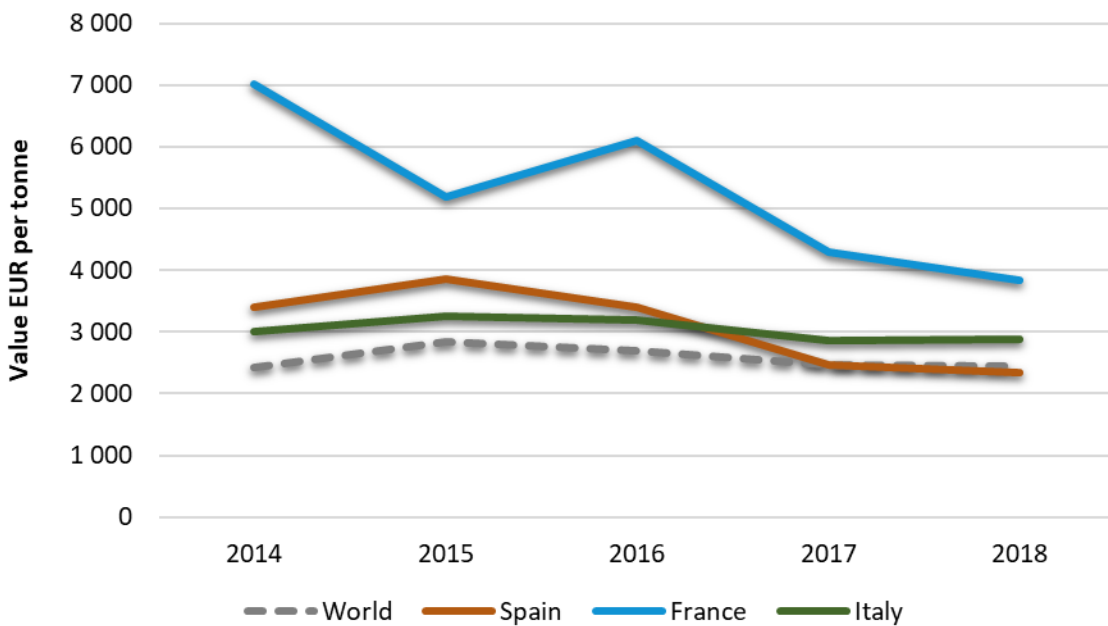
Given the wide availability of Spanish wine in Colombia (see image on the left), in addition to be the largest European exporter by volume, Spanish imports were also the highest valued amongst EU countries, namely at EUR 6.8 million in 2018. Nonetheless, in terms of unit value, French imports recorded the highest rate, despite the sharp decrease of recent years. Image below illustrates premium wines sold at a Colombian retailer. As indicated in Figure 5-11, the unit value of French wines was 3 846 EUR/tonne in 2018, far above the average of wines imported into Colombia (2 447 EUR/tonne). Similarly, the unit value of Italian imports was higher than the world average, i.e. 2 891, unlike Spanish wines' unit value, which amounted to 2 350 EUR/tonne. The main reason is that, like Argentina and Chile, Spanish producers export a broad range of price ranges which are suitable for different types of consumers.

Figure 5-10: Colombian imports of wine by country, 2014-18; tonnes



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
 Data for CN code 2204.

Figure 5-11: Per unit value of Colombian imports of wine for selected EU countries, 2014-18 (EUR per tonne)



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
 Data for CN code 2204.

5.3.3.3 EU GI products

As reported in section 9, under the modernised EU-Colombia and Peru Trade Agreement, **63 wine products are recognised as Geographical Indications in Colombia**, including French (27), Spanish (17), and Italian (13) wine products. The other wines that are registered as GIs in Colombia are produced in Cyprus, Hungary, Portugal, and Slovakia. Popular GIs registered in Colombia are French *Bordeaux* and *Champagne*, Spanish *Priorat* and *Rioja*, Italian *Chianti* and *Asti*, Portuguese *Vinho Verde* and Cypriot *Zivania*, amongst many others.

5.3.3.4 Main competitors



Argentinian and Chilean wines at a gourmet Colombian retailer © Agra CEAS / Euromonitor International, 2019.

Although European wines play an important role in the Colombian market, Latin American products, especially from Chile and Argentina have been very popular for years now and are perceived as affordable good-quality products. Notably, Chilean producers dominate the Colombian market, with brands, such as Casillero de Diablo and Gato Negro which enjoy the highest brand recognition amongst wine consumers, i.e. at 92% and 88% respectively. Chilean wines were indeed the first to penetrate the market, hence the average Colombian consumer tend to associate wine with Chilean brands.^{63 64}

5.3.4 Specific market entry requirements

Market Access and Entry

As reported in section 4.2.1, wine producers must submit the Import Registration form to the MINCOMEX and pay duties in order to ship their products to Colombia. Imported products must comply with Law 9/1979, as well as all further food and safety rules, as described in detail in section 4.2.2.

In terms of tariffs, **all European wines benefit from a duty-free access to the Colombian market**, under the EU-Andean Trade Agreement. However, companies that wish to place their wine products on the Colombian market must bear in mind the new tax scheme (see section 5.3.2). The latter poses a challenge especially for small and medium-sized import companies, as export costs may dramatically increase.

Detailed information on import duties and Rules of Origin can be consulted on the European Commission website:

<https://madb.europa.eu/madb/atDutyOverviewPubli.htm?countries=CO&hscod=2204>

⁶³ Euromonitor International: Alcoholic Drinks, 2019

⁶⁴ Chilean wine imports dominate Colombian market as consumption grows, https://en.vinex.market/articles/2016/11/08/chilean_wine_imports_dominat_colombian_market_as_consumpti_on_grows

Customs procedures

A list of standard documents required for import wine into Colombia is presented in section 4.2.1 (Table 4-1). Furthermore, as outlined in Table 4-2 in section 4.2.1, a document certifying that importers have registered as Importers of Alcoholic Beverages with the MINSALUD is required for custom clearance of wine products. The **Sanitary Registration of Alcoholic Beverages** is normally released in five days at a cost of EUR 804-960 and has a 10 years-validity.

In general, companies must be advised that **red tape remains a problematic market access issue in the Colombian wine sector.**

Any other up to date information on appropriate documents concerning customs procedures can be consulted on European Commission website:

<https://madb.europa.eu/madb/datasetPreviewIFpubli.htm?countries=CO&hscod=2204>

SPS measures

All sanitary and Phytosanitary measures concerning the import of wine into Colombia are in line with international standards.

Up to date information on appropriate documents concerning SPS measures:

<https://madb.europa.eu/madb/datasetPreviewIFpubli.htm?countries=CO&hscod=2204>

Labelling

As described in more detail in section 4.2.3, wine must comply with generic labelling rules, as provided for in Resolutions 5109/2005 and 1506/2011, as well as with **specific labelling rules** concerning alcoholic beverages, as set out in **Decree 1686/2012**. As illustrated in the picture below, wine labels must display a warning statement against excessive drinking.

There are also advertising restrictions on alcoholic beverages (see section 6.2).



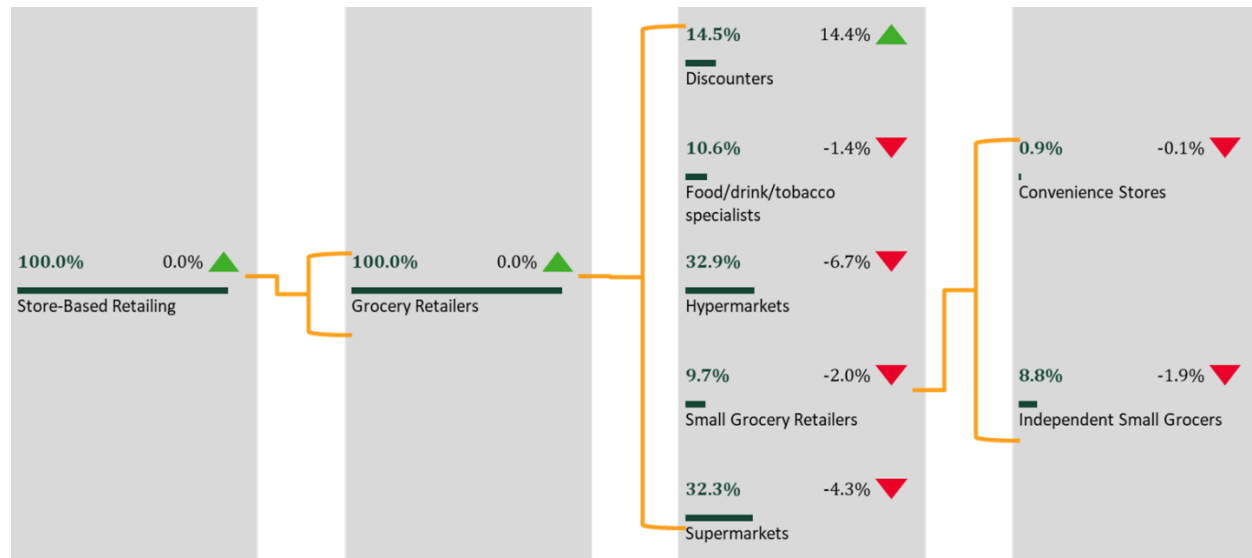
Bottles of wine displaying warning statements against excessive drinking (on the shelves of a specialist alcohol retailer). © Agra CEAS / Euromonitor International, 2019.

5.3.5 Distribution

In Colombia, wine volumes are mostly **distributed through off-trade channels** (86%). As reported in Figure 5-12, all wine distributed through off-trade channels is sold at store-based retailers, specifically grocery retailers. Of these, in 2018 **the majority were hypermarkets (33%) and supermarkets (32%)**, followed by food/ drink/ tobacco specialists (29%) – like Dislicores, discounters (15%), and small grocery retailers (10%). Driven by consumers' increased price sensitivity, discounters recorded an exceptional 14% growth in 2018. On the contrary, the other channels' shares dropped off. However, this trend may change over the next year, as the competition of discounters led to an increased focus on price, with modern retailers expanding their offer of low-priced wines.

Contraband was considered to have little impact on the sales of wine in Colombia until 2016, when changes to the tax legislation caused a marked increase in the price of imported wine. The new tax system was criticised for paving the way towards contraband in wine sales, amongst other concerns. Nevertheless, **contraband of wine** in Colombia is considered to be **limited to low-quality wine** that is commercialised mostly at the end of the year when demand is high.

Figure 5-12: Distribution channel overview of wine in Colombia (2018); off trade volume



Source: Euromonitor International: Alcoholic Drinks, 2019.

5.3.6 Challenges for EU products

Since the introduction of the new tax scheme, which severely affects wine products, Colombia has recorded stagnating consumption trends. At the local level, increased costs resulting from the tax change have especially harmed small distributors and obliged wine exporters to negotiate with large distributors who are unwilling to take risks by working with new and unknown brands. Overall, the import of wine has become less attractive following the new tax scheme.

On top of that, the average Colombian consumer perceives wine as a product for special occasions, rather than an everyday beverage to drink with meals. Finally, EU products face the fierce competition of Latin American exporters, especially Chile, whose wide offer is attractive for different consumers, especially price-sensitive ones.

Market Takeaway: Wine

Consumption: Sales have been dramatically growing over the past decade, although the new tax regime has recently discouraged consumption of wines, especially mid and high-priced varieties.

Competition: EU exporters face the strong competition of Latin American producers, which offer several price ranges; although dynamic, domestic production does not currently pose a challenge.

Distribution: Wines are mostly distributed through off-trade channels, namely supermarkets, hypermarkets and discounters. Sales through discounters performed very well in 2018.

Challenges: The new tax regime poses challenges to exporters while reducing consumers' purchasing power; Colombians do not usually have wine with food. Overall the market has become harder to enter in recent years.

Opportunities: Women, especially health-conscious ones, drive sales of sparkling wines; Upper-income classes are interested in EU high-quality wines.

5.4 Spirits

5.4.1 SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ EU countries are top exporters of spirits. ▪ EU spirits have a reputation for high quality. ▪ Under the EU-Andean FTA, most EU spirits have duty-free access to the Colombian market. ▪ Rum and whiskies are very popular alcoholic drinks in the county, especially on the Caribbean coast. 	<ul style="list-style-type: none"> ▪ The average consumer is price-sensitive, hence they prefer economic or standard brands. ▪ Per capita consumption of spirits has been declining since 2014. ▪ Local aguardiente and rum remain the dominant drinks in the Colombian spirits market.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ Sales of rum and white spirits are on the rise; whisky sales are expected to grow at fast rates over the next years. ▪ Millennials are increasingly drinking vodka, gin and rum, which can be used in cocktails. ▪ Consumption of spirits amongst women is rising. ▪ Wealthy consumers have a taste for imported premium spirits. 	<ul style="list-style-type: none"> • The new tax scheme has negatively affected consumption of spirits. • Third countries' exports to Colombia saw an increase in the last years. • 22% of all alcohol sold in Colombia came from illegal sources. • The market access process can be slow and burdensome.

5.4.2 Consumption

5.4.2.1 Evolution of consumption

Sales of spirits, especially domestic brands, were negatively affected by the 2017 tax reform imposed on alcoholic drinks (see box below). In general, **changes in taxation contributed to the devaluation of categories**, and in some cases pushed companies to change bottle sizes from 750 ml to 700 ml, to be able to market their product at pretty affordable prices.

Law 1816/2016

Until 2016, EU alcoholic beverages were subject to higher taxes and charges than local products. This was in contravention of WTO rules and the EU-Andean FTA provisions. Therefore, the Colombian Congress issued the Law 1816 in December 2016, to bring Colombia into compliance with its trade commitments under the WTO and trade agreement with the EU. Indeed, this Law aims to remove the discriminatory tax system as well as the anti-competitive practices conducted by local alcoholic beverages producers. Therefore, the applicable tariff for consumption **tax for spirits** is set at COP 220 (about 0.07 EUR) for each alcoholometric degree in unit of 750 cubic centimeters or equivalent, plus an **ad valorem tariff of 25% on the sale price**. However, the Law also prevents the government from creating introducing trade barriers and discriminatory practices to the disadvantage of importers.⁶⁵

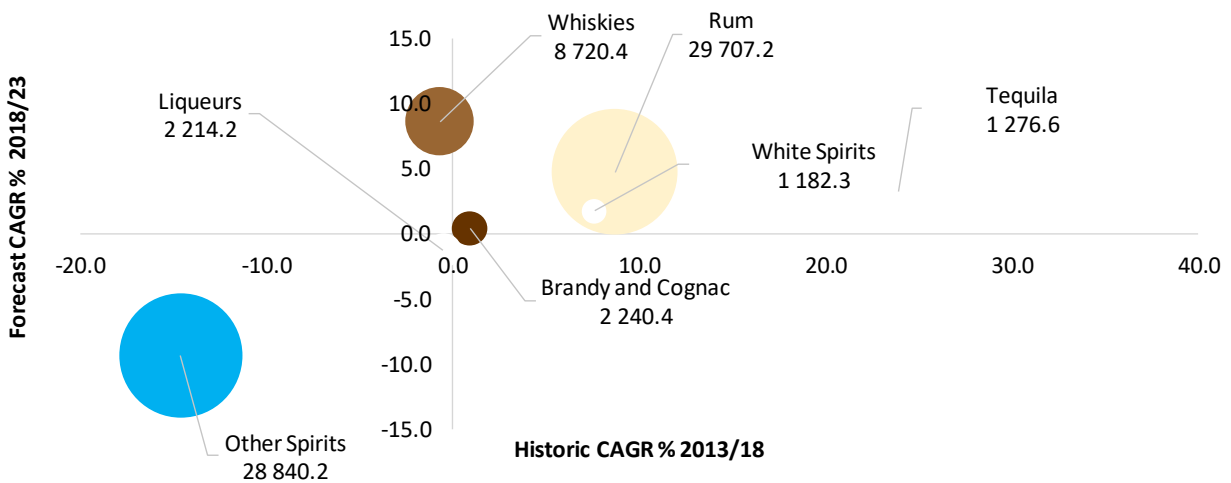
⁶⁵ Colombian Congress issued a law that eliminates the discriminatory tax system between imported and domestic alcoholic beverages, <https://www.elanbiz.org/colombian-congress-issued-a-law-that-eliminates-the-discriminatory-tax-system-between-imported-and-domestic-alcoholic-beverages>

As a result of Law 1816/2016, **consumption of spirits declined by 5.3% per year**, mostly due to the poor performance of aguardiente, which accounts for a large share of sales in the sector. However, total consumption of spirits reached over 74 million litres in 2018. With 29.7 million litres, rum accounted for 40% of total volume of sales, followed by whiskies (12%, or 8.7 million litres), brandy and cognac, as well as liqueurs (3% each), tequila and white spirits (2% each). The category of “Other spirits”, which includes national specialties, such as aguardiente, accounted for the remaining 39% of total sales.

As outlined in Figure 5-13, the 2013-18 growth rate largely varied between categories. Supported mainly by increasing demand for products in the standard and economy segments, tequila recorded the fastest growing rate, exceptionally increasing by 23.9% per year. For similar reasons, rum and white spirits grew by respectively 8.7% and 7.6%, while brandy and cognac recorded a modest 0.9% growth. On the contrary, other spirits (including aguardiente) sales fell by 14.6%; while a moderate decline was noticed in whiskies and liqueurs. The negative performance of aguardiente and other local spirits is attributable to the increasing competition from low-priced imported spirits, as well as the lack of innovations capable of maintaining the interest of consumers.

Per capita consumption of spirits has also declined, down from 2.1 (2013) to 1.5 (2018) litres per capita. In 2018, per capita consumption slightly varied between categories, peaking to 0.6 litres in the categories of other spirits and rum.⁶⁶

Figure 5-13: Evolution and forecast of spirits market (000 litres) in Colombia, 2032-2023; total volume



Source: Euromonitor International: Alcoholic Drinks, 2019.

⁶⁶ Euromonitor International: Alcoholic Drinks, 2019

5.4.2.2 Consumer profile and purchase criteria

In Colombia, the spirits market accounts for around a third of total alcoholic beverages consumption share by volume. Therefore, spirits are the second most popular alcoholic beverages, preceded only by beer. Local aguardiente and rum are the most popular spirits, followed by whisky. Millennials are the target market for imported spirits.

Consumers

Consumer groups in Colombia can be segmented according to different criteria including gender, age and income.

- **Males** prefer stronger drinks like aguardiente; however, this beverage is particularly popular among lower-income consumers. **Females** tend more towards cocktails, white spirits and cream liqueurs. Vodka, especially flavoured ones including lemon, apple and coconut are also appealing to women. In categories like whiskies, rum, gin and tequila, men and women seem to have similar consumption.
- **Older consumers**, despite not being heavy drinkers compared to the younger generations, usually tend to be more selective and spend more money on premium products. These consumers are willing to try new high-end brands and are becoming better informed about the history behind and particular characteristics of these drinks. This is contributing to the wider availability of upmarket brands such as Hendrick's, Citadelle, Bulldog, Ciroc, Ketel One, Zacapa, Botran, Johnnie Walker Gold Label and Johnnie Walker Platinum Label, among others. Similarly, single malt Scotch whisky is mainly demanded by older consumers who are more enthusiastic and knowledgeable about the different types.
- **Young people**, who belong to a higher income segment, are more inclined towards Irish whiskey and bourbon, whereas the middle-class buys blended scotch whisky. There was a positive trend of gin driven by young adults that consider the spirit as a more inviting and sophisticated beverage, with an interesting flavour that is determined by the herbs and spices used by the different brands, giving different alternatives to consumers. It can even be paired with certain meals. In general, the average youth is more prone to drink aguardiente or tequila.

Regarding **imported spirits**, as an overall group they are preferred mostly by younger consumers between the ages of 20 and 40 and from university students to professionals with a graduate or post graduate degree. These consumers belong in the upper-middle and high-income groups and mostly reside in the big cities of the country. This is a consumer profile that is more connected with the world, curious about the drinks of other countries, eager to explore new alternatives and is looking for sophistication and quality in products. Consumption of imported spirits such as tequila, gin, bourbon and single malt Scotch whisky remain highly concentrated in affluent consumer groups and thus are less sensitive to price movements. For this group imported brands are also a status symbol.

Looking at some very specific imported brands, the most common Colombian consumers of each in recent years are as follow:

- **Baileys (liqueur)** is typically consumed by successful, multi-tasking women between the ages of 27 and 40, of middle and high-income groups.

- **Old Parr** (*whisky*) appeals mostly to men around the age of 35 in management positions, of upper-middle and high-income groups, with a college degree or higher level of education.
- **Chivas Regal** (*whisky*) attracts both men and women between the ages of 28 and 38, professionals with a college degree, of upper-middle and high-income groups.
- **Something Special** (*whisky*) is consumed by upper-middle and high-income groups, professional men around the age of 30.
- **Johnny Walker Black Label** (*whisky*) attracts mostly high-income businessmen or professional men around the age of 32.
- **Johnny Walker Red Label** (*whisky*) is typically for men around the age of 24, university students from of-middle and high-income groups.
- **Smirnoff** (*vodka*) appeals to both men and women around the age of 26, university students or new graduates beginning their first jobs, of upper-middle and high-income groups.
- **Absolut Vodka** is typically consumed by both men and women between the ages of 18 and 35, university students or graduates, of upper-middle and high-income groups.
- **Absolut 100** (*vodka*) attracts mostly men around the age of 49.

These brands and their most common consumer groups may serve as a starting point for identifying the potential consumers of new products entering the market.

Aguardiente, derived from sugarcane and flavoured with aniseed, is considered Colombia's national drink, although it is more prevalent inland. Rum and whiskey, on the contrary, are the most popular drinks in the Caribbean coast and insular Colombia (San Andrés and Providencia islands). Vodka and gin, which are used to prepare cocktails, are mostly purchased in large cities and touristic areas.^{67 68}

Drivers and method of consumption

Aguardiente, Colombia's most popular drink, is commonly drunk in company, in various occasions, including family gatherings and celebrations. Similarly, whisky is a liquor that is usually present in celebrations: birthdays, Father's Day, fairs and local festivals, amongst others.

Colombians mostly purchase blended whisky (which accounts for 98% of total consumption in terms of volume) belonging to the standard segments (namely some 3-11 years old whisky). Consumption of whisky and aguardiente mostly takes place at home. On the contrary, other spirits, such as vodka and gin, are less popular and mostly purchased at clubs or bars.

The **main drivers for the increased consumption of spirits** in recent years can be summarised as follows:

- the emergence of a **wider choice of international brands** for consumers;
- **new lifestyle trends**, such as an increase in households' average income;

⁶⁷ Colombianos prefieren el aguardiente por encima del ron y el whisky, <https://www.larepublica.co/consumo/colombianos-prefieren-el-aguardiente-por-encima-del-ron-y-el-whisky-2768748>

⁶⁸ ¿Toma whisky? Podría estar a un paso de ser exitoso, <https://www.finanzaspersonales.co/consumo-inteligente/articulo/tomar-whisky-es-bueno/60259>

- the **wider popularity of standard and economic spirits** brands.⁶⁹⁷⁰

Purchase criteria

The main purchase criteria of spirit consumers as a whole in Colombia are:

- **Price:** The tax reform that entered into force in 2017 imposed compound rates on alcoholic drinks, comprised of ad valorem, specific tax per degree of alcohol and 5% VAT, leading to a remarkable price hike for the consumer. Combined with the economic deceleration of the last few years, price stands out as the most important variable in the purchasing decision and many consumers are trading down to standard and economy brands. Nonetheless, wealthy consumers are more interested into quality and taste than in price. Therefore, imported spirits purchases, which are mostly carried out by these upper-income consumers, are generally less affected by price.
- **Brand:** Brand recognition and quality are also important criteria that consumers consider at the time of purchasing as consumers perceive good brands to be synonymous with good quality. The most common groups of consumers purchasing certain brands were identified above.
- **Age and taste:** For a lot of spirits, age and taste also influence the purchasing decision. For spirits such as scotch, whisky and bourbon, consumers prefer smooth flavour and the longer the spirits are aged, the smoother it is. One of the biggest complaints about vodka is the fact that it burns, thus, consumers prefer higher-quality vodka as it has a little more structure in terms of texture and a viscosity to them that balances out the alcohol and avoids burning sensation.

⁶⁹ Consumo de whisky en Colombia aumentó un 50%, <https://www.portafolio.co/economia/consumo-de-whisky-en-colombia-aumento-un-50-505937>

⁷⁰ Colombianos prefieren el aguardiente por encima del ron y el whisky, <https://www.larepublica.co/consumo/colombianos-prefieren-el-aguardiente-por-encima-del-ron-y-el-whisky-2768748>

Spirits on Colombian retailers' shelves...

The price ranges across different segments for spirits are as follows in rough terms:

- Economy: between COP\$ 28 000 and 40 000 (EUR 7.26 - 10.37)
- Medium: between COP\$ 40 000 and 80 000 (EUR 10.37 – 20.75)
- Premium: between COP\$ 80 000 and 140 000 (EUR 20.75 – 36.31)
- Super Premium: above COP\$ 140 000 (EUR 36.31)

Spirits prices are affected by origin and volume. For example, a 50 ml Jack Daniels Whiskey can be purchased at COP\$ 9 500, or about EUR 2.5, while a 38 years Scottish Royal Salute whisky (which is a super premium product) in a 750 bottle is available at COP\$ 3 737 900, or about EUR 1 000.

Bottles are available in the following formats: 50 ml, 100 ml, 350 ml, 360 ml, 375 ml, 700 ml, 750 ml, 1 litre. The most common format is, however, 700-750 ml.





As imported spirits are perceived as fine products, they are also sold in packages that can be given as presents (see image on the left, representing a Limited edition of Chivas Regal scotch whisky which is sold at COP\$ 102 900, or about EUR 28).



EU premium products are also displayed on the window in some shops. Some of them can be purchased in gift packages, or as a part of a kit (i.e. French Citadelle gin sold with tonic water and a bulbous glass, to prepare gin tonic).



Certain retailers offer sales promotions on imported products, such as discounts (i.e. 15-40% in the image on the left).

Pictures: © Agra CEAS /

5.4.2.3 Recent market trends

Sales in the category of spirits are expected to recover in 2018-23, growing at a 0.3% yearly rate. However, **growth is set to largely vary between categories, with whiskies recording the best performance.** Growth in tequila, white spirits and rum, on the contrary, is expected to slow down. Sales of aguardiente, the most important local spirit, are likely to continue to decline, facing competition from standard and economy whisky. Also, the lack of innovation is moving consumers towards other alcoholic drinks, notably whisky, tequila and white spirits in which a wide range of brands and price ranges can be found.⁷¹

5.4.3 Offer

5.4.3.1 Domestic production

Each Colombian department has its own monopoly on liquor production and distribution. Domestic production of spirits is relatively large. Colombia is a large producer of aguardiente, a strong alcoholic beverage, obtained by fermentation and later distillation of sugared or sweet musts, vegetable macerations, or mixtures of the two.⁷² The country produced 60 million litres of aguardiente in 2017. Rum is the second most produced alcoholic beverage in Colombia, with nearly 42 million litres produced in 2017. Fabrica de Licores y Alcoholes de Antioquia, Industria de Licores de Caldas, Empresa de Licores de Cundinamarca and Licores del Valle were the top four players and accounted for around 80% of the local production.

Table 5-2: Spirits production volume and value, 2017

Product	Volume, litres	Value, 000 EUR
Aguardiente	60 842 214	176 493
Rum	41 519 638	110 298
Brandy	2 655 471	12 163
Cacao liqueur	2 043 946	6 616
Whisky	711 561	3 278
Vodka	55 087	168

Source: Agra CEAS based on DANE figures.

5.4.3.2 Imports and exports

Despite the considerable domestic production, Colombia is a net importer of spirits. Imports have shown a steady growth in 2018, rising to 24 242 tonnes (Figure 5-14). Volumes of whiskies accounted for over half imports of spirits by volume, followed by rum (31%), liqueurs and cordials (11%), vodka (4%), and gin and Geneva (2%) (Figure 5-15).

With 10 026 tonnes in 2018 (or 41% of the total Colombian imports in terms of volume), the United Kingdom was the leading importer of spirits into Colombia. The country mostly exported whisky (96% of

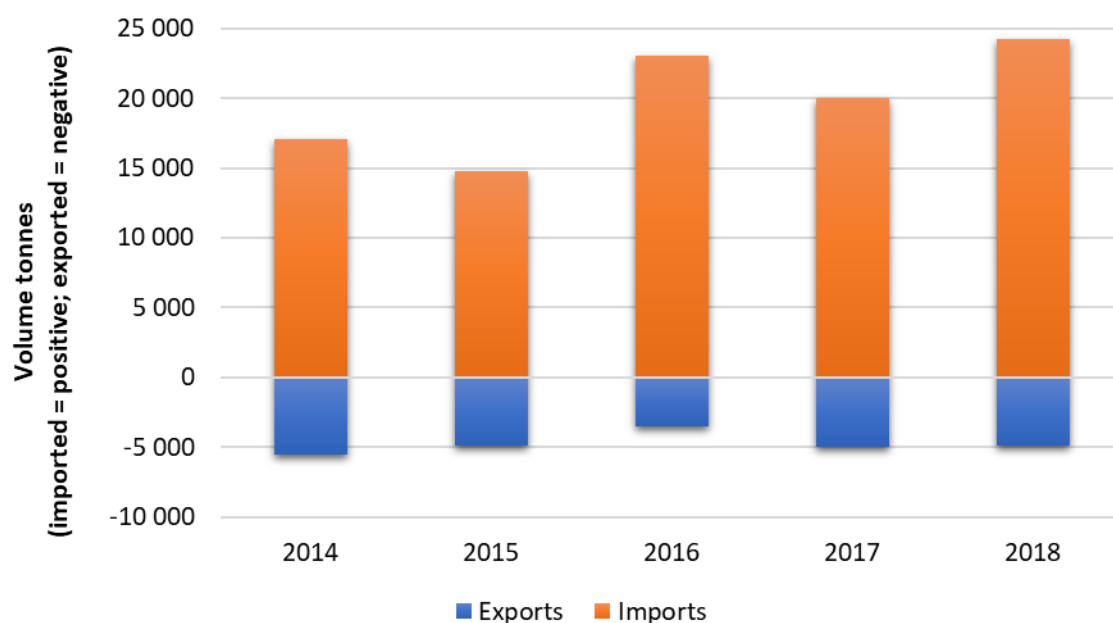
⁷¹ Euromonitor International: Alcoholic Drinks, 2019

⁷² <https://www.wikiwand.com/en/Aguardiente>

UK spirits imports into Colombia). Panama (3 820, or 16%), Italy (12%) and Mexico (10%) followed. The rest of the EU accounted for the remaining 8% of total Colombian imports of spirits, 52% of which were shipped from Ireland (Figure 5-16).

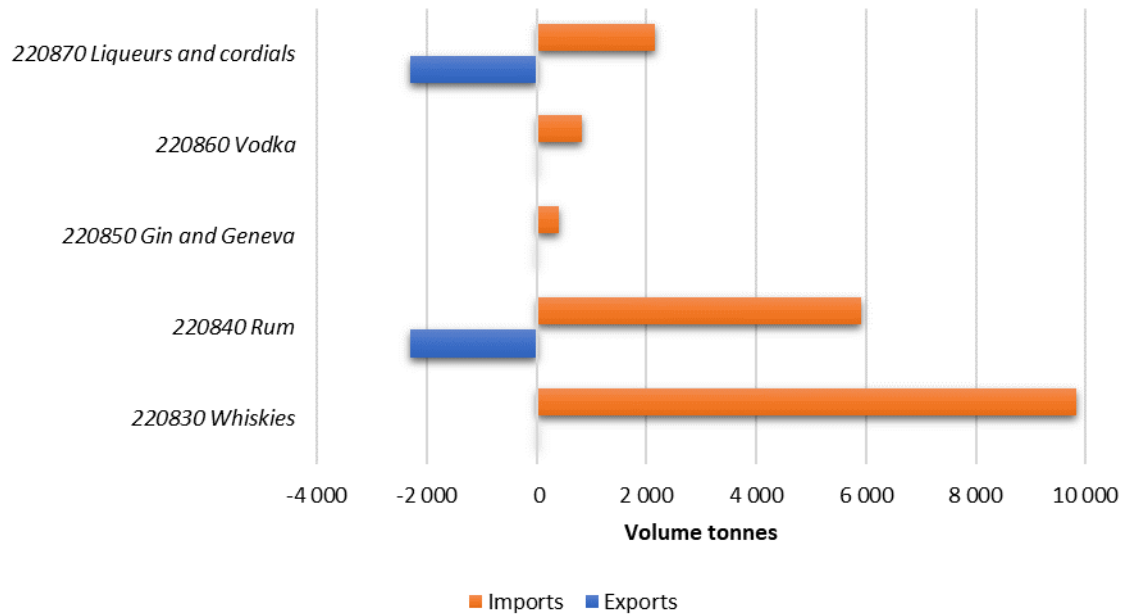
With nearly EUR 40.1 million of imports, the United Kingdom also led Colombian spirits exports in terms of value in 2018, followed by Mexico (about 11.5 million), Panama (4.1 million), and Italy (3.7 million). In terms of per unit value, UK (4 062 EUR/tonne) imports were well above the average of spirits imported into Colombia (3 049 EUR/tonne) in 2018, although they recorded decreasing trends over the past five years. On the contrary, Italian imports recorded a lower per unit value than the world average (1 228 EUR/tonne), although the latter was slightly higher compared to 2014 levels.

Figure 5-14: Trade balance (imports and exports) of spirits in Colombia, 2014-18; tonnes



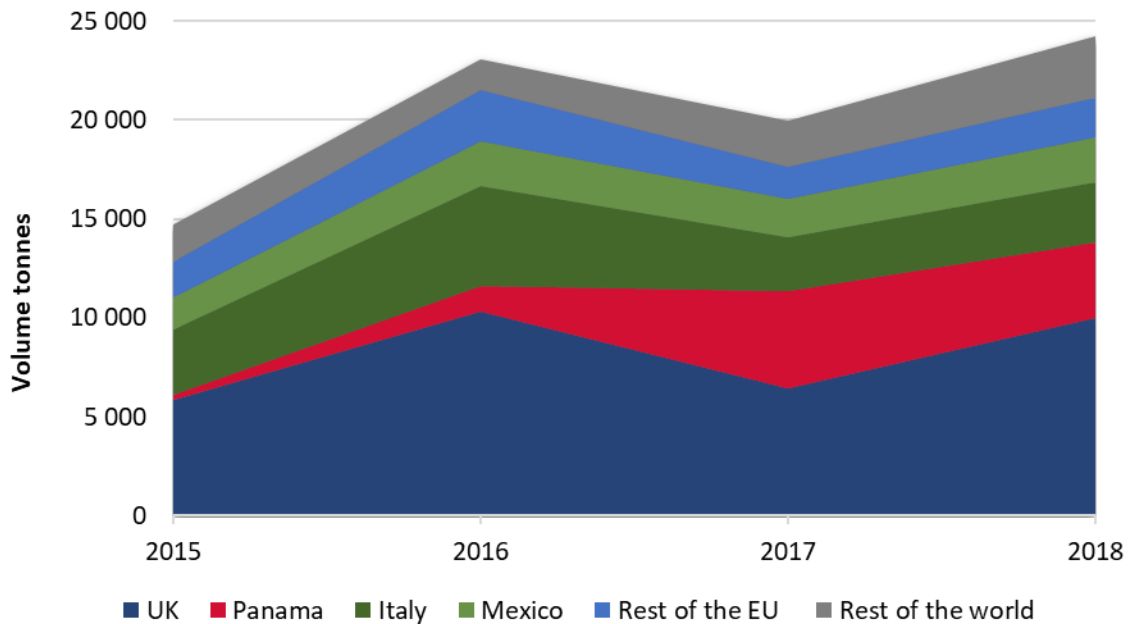
Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN code 2208.

Figure 5-15: Trade balance (imports and exports) of spirits in Colombia, by type, 2018; tonnes



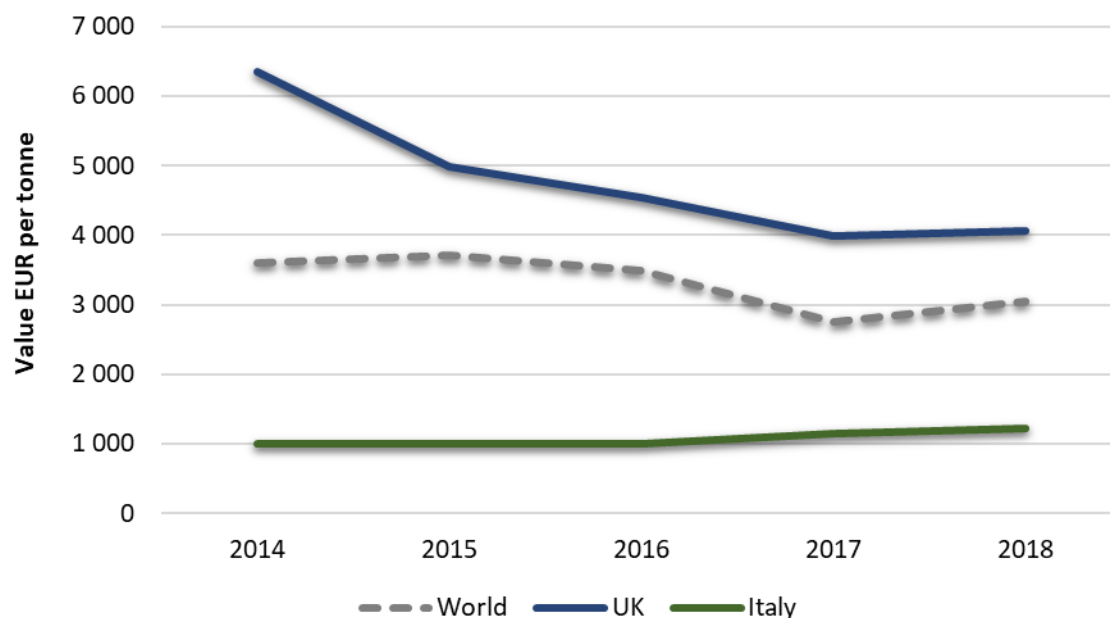
Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
 Spirit names shortened in most cases. CN codes before spirit name.

Figure 5-16: Colombian imports of spirits by country, 2014-18; tonnes



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
 Data for CN code 2208.

Figure 5-17: Per unit value of Colombian imports of spirits for selected EU countries, 2014-18 (EUR per tonne)



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN code 2208.

5.4.3.3 EU GI products

As reported in section 9, under the modernised EU-Colombia and Peru Trade Agreement, **19 spirits are recognised as Geographical Indications in Colombia**, from various countries, namely France, Austria, Cyprus, Finland, Germany, Greece, Ireland, Italy, Lithuania, Poland, Spain, Sweden and the UK. Notable examples are Irish Whiskey, French *Cognac*, and Italian *Grappa*.

5.4.3.4 Main competitors

As outlined in section 5.4.3.2, the EU accounts for 61% exports of spirits to Colombia in terms of volume. However, Panama, Mexico and the United States are rather strong exporters. Although the primary source of whisky remains UK, US-based whisky and bourbon are gaining prominence. However, it is important to note that imported brands only account for around 20% of consumption of spirits; and hence domestic production dominates, with aguardiente and rum the dominant domestically-produced spirit types. That said, this domestic production has seen a decline over the last few years. In terms of company's market share, Fábrica de Licores y Alcoholes de Antioquia remained the top player in spirits in volume terms in 2018, although in this year its share decreased strongly, impacted mainly by the falling sales of aguardiente, in which the company has a strong presence.⁷³

⁷³ Euromonitor International: Alcoholic Drinks, 2019.

5.4.4 Specific market entry requirements

Market Access and Entry

As reported in section 4.2.1, spirits producers must submit the Import Registration form to the MINCOMEX and pay duties in order to ship their products to Colombia. Imported products must comply with Law 9/1979, as well as all further food and safety rules, as described in detail in section 4.2.2.

In terms of tariffs, **nearly all European spirits benefit from a duty-free access to the Colombian market**, under the EU-Andean Trade Agreement. The only two exceptions are the products outlined below:

- Rum and other spirits obtained by distilling fermented sugar-cane products (CN code 2208.40);
- Vodka (CN code 2208.60).

On both products a 7.3% tariff is applied, plus a sales tax amounting to 5% of the duty paid value.

However, companies that wish to place their products on the Colombian market must bear in mind the new tax scheme (see section 5.4.2). The latter poses a challenge especially for small and medium-sized import companies, as export costs may dramatically increase.

Detailed information on import duties and Rules of Origin can be consulted on the European Commission website:

<https://madb.europa.eu/madb/atDutyOverviewPubli.htm?countries=CO&hscod=2208>

Customs procedures

A list of standard documents required for import spirits into Colombia is presented in section 4.2.1 (Table 4-1). Furthermore, as outlined in Table 4-2 in section 4.2.1, a document certifying that importers have registered as Importers of Alcoholic Beverages with the MINSALUD is required for custom clearance of spirits. The **Sanitary Registration of Alcoholic Beverages** is normally released in five days at a cost which ranges from EUR 804 - EUR 960; and it has a 10 years-validity.

In general, companies must be advised that red tape remains a problematic market access issue in the spirits sector.

Any other up to date information on appropriate documents concerning customs procedures can be consulted on European Commission website:

<https://madb.europa.eu/madb/datasetPreviewIFpubli.htm?countries=CO&hscod=2208>

SPS measures

All sanitary and Phytosanitary measures concerning the import of spirits into Colombia are in line with international standards.

Up to date information on appropriate documents concerning SPS measures:

<http://madb.europa.eu/madb/datasetPreviewIFpubli.htm?countries=KR&hscod=2208>



Labelling

As described in more detail in section 4.2.3, spirits must comply with both generic labelling rules, as provided for in Resolutions 5109/2005 and 1506/2011, as well as with **specific labelling rules** concerning alcoholic beverages, including the mandatory statement against excessive drinking (see pictures)

as set out in **Decree 1686/2012**. There are also advertising restrictions on alcoholic beverages (see section 6.2).

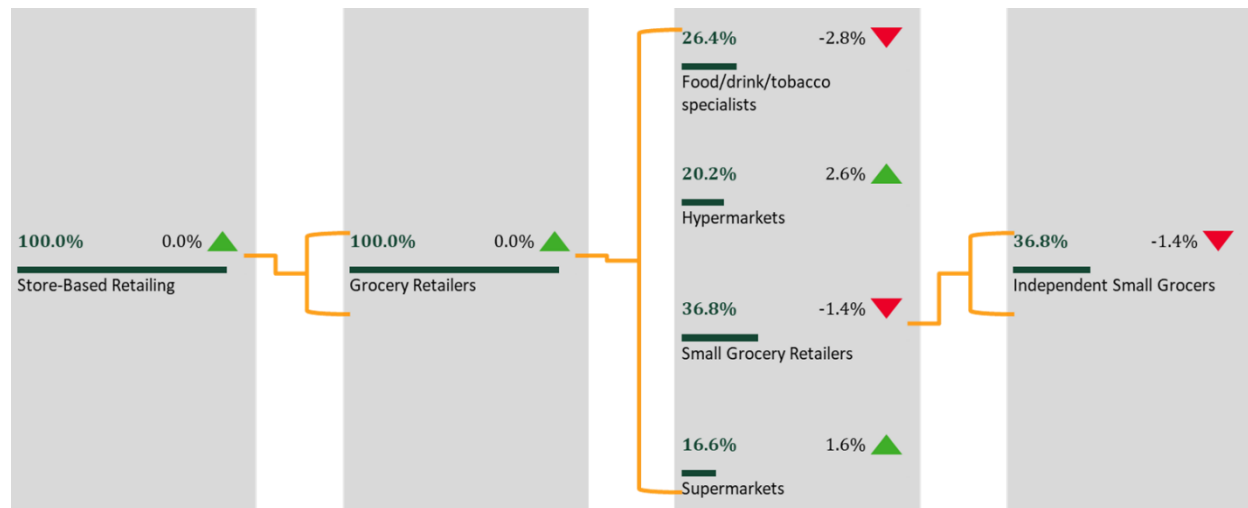
5.4.5 Distribution

In Colombia, **spirits are mostly distributed through off-trade channels** (70.2%). Notably, as reported in Figure 5-18, all spirits sold through off-trade channels are distributed through store-based retailers, specifically grocery retailers. Of these, in 2018 the majority were **small grocery retailers** (36.8%), followed by **food/ drink/ tobacco specialists** (26.4%), **hypermarkets** (20.2%), and **supermarkets** (16.6%).

Contraband and counterfeit of spirits

According to official estimates, 22% of all alcohol consumed in Colombia, in 2017, came from illegal trade. Contraband and counterfeit alcohol are the most common problems. La Guajira remains the most important point for the entry of contraband, which is then distributed in the country, with markets such as San Andresito in Bogota historically associated with distribution. Most consumers in the middle-/low-income segments make purchasing decisions based solely on price, driving the sales of some counterfeit and smuggled spirits. Despite the fact that the authorities have tightened controls, the confiscation of illegal products has increased, because the rise in taxes on alcoholic drinks since 2017 encouraged contraband, keeping figures at high levels. This also contributed to the popularisation of sales of illegal spirits through social networks such as Facebook and Instagram, through pages which offer bundles of three bottles of premium brands at very low prices. As the Colombia peso is devalued, contraband is accepted by most consumers, with **whiskies, vodka and rum being the spirits most affected by contraband**, and aguardiente and rum are the spirits most counterfeited.

Figure 5-18: Distribution channel overview of spirits in Colombia (2018); off trade volume



Source: Euromonitor International: Alcoholic Drinks, 2019.

Potential exporters must bear in mind that, in Colombia, **the permission to distribute spirits is given by the local government of each department**. Departmental authorities require a distributor to have local storage facilities to be able to distribute in the department. There are very few distributors large enough to distribute spirits in the entire country. SMEs exporters from the EU may find burdensome that their products require different distributors for different regions, or that the large distributors consider them small and may not be willing to distribute their products unless they invest heavily in promotional activities that help people recognise the brand.

5.4.6 Challenges for EU products

Although EU companies are strong players in the Colombian spirits market, large domestic production and international competitors may pose a challenge for new companies that wish to penetrate this market. However, the biggest challenge is the contraband and counterfeit of spirits, which may negatively affect sales of imported spirits. On top of that, recent changes in taxation resulted in reduced consumption, to the detriment of higher quality products, whose sales have declined in the last years.

Market Takeaway: Spirits

Consumption: Driven by the increasing consumption amongst millennials, rum and white spirits sales have been growing over the last years and are expected to continue to perform well. The new tax scheme, on the other hand, resulted in whisky and liqueurs recording a negative growth, although this trend is set to reverse course.

Competition: Although EU exports account for a large share of the spirit market, domestic production dominates and exporters from third countries may pose some challenges.

Distribution: Spirits are mostly distributed through off-trade channels, with small grocery retailers accounting for most sales; However, specialist stores have become increasingly important.

Challenges: The next tax system resulted in consumers switching to lower-priced spirits; Contraband accounts for nearly a quarter of all spirits sales.

Opportunities: Wealthy consumers have a good opinion of EU; Millennials and women are the target audience for spirits producers.

5.5 Olive oil

5.5.1 SWOT analysis

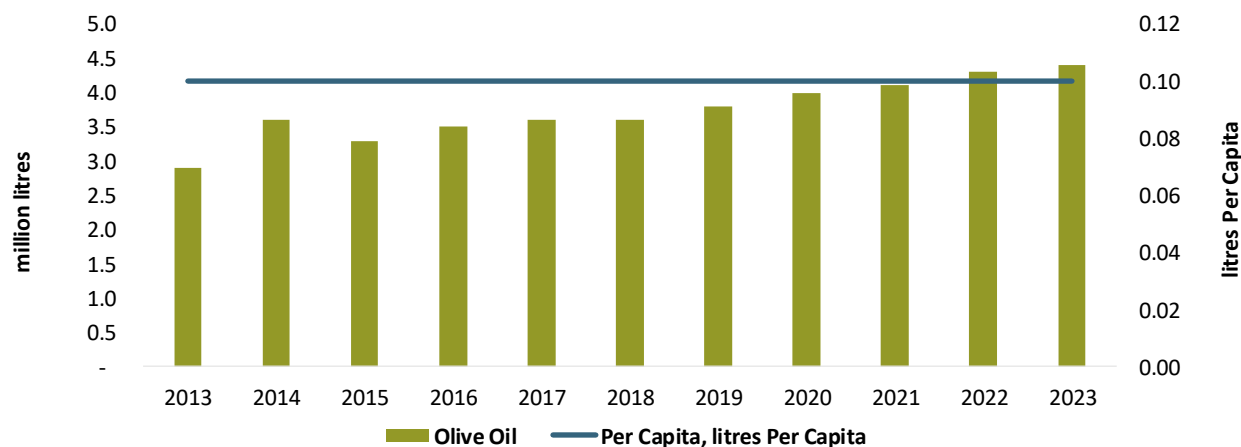
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ Positive and healthy image of olive oil. ▪ European countries among top importers of olive oil to Colombia, and Spanish olive oil in particular held in high regard. 	<ul style="list-style-type: none"> ▪ Relative lack of knowledge on the use of olive oil, especially cold/raw. ▪ Strong preference for other edible oils when cooking.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ Growing demand for olive oil. ▪ Increasing awareness on use of olive oil among Colombian consumers. ▪ Possible interest in bulk imports for bottling locally; though this would bypass the importance of branding. 	<ul style="list-style-type: none"> • Price-sensitivity of Colombian consumers. • Cheaper price of other edible oils available on the market.

5.5.2 Consumption

5.5.2.1 Evolution of consumption

As Figure 5-19 presents, consumption of olive oil has been on a stable growth path and is expected to remain on the upward trend. While the category accounted for 1% of the edible oils and fats sales volume in 2014, this share increased to 5% in 2018 reaching 3 400 tonnes in volume sales. The market size is expected to further increase from 3.9 million litres in 2018 to 4.7 million in 2023. However, it should be pointed out that the size of olive oil market constitutes marginal share in comparison to other edible oils available on the Colombian market, in particular palm and soybeans oils.

Figure 5-19: Evolution and forecast of market for olive oil (size; million litres) and olive oil consumption per capita, in Colombia; 2013-2023



Source: Euromonitor International: Packaged Food, 2019.

Note: figures for 2018 to 2023 based on forecasts.

5.5.2.2 Consumer profile and purchase criteria

Consumers

Colombian consumers are not particularly familiar with olive oil's qualities and the usage of it. In general, they tend to use other edible oils, such as palm oil and soybean oil in particular as well as canola and sunflower oils. Olive oil is considered as a premium product, with consumers still learning about the differences and advantages of this product in comparison to other types⁷⁴. The price of olive oil is usually very high, which additionally impacts the purchasing decision⁷⁵. In effect, olive oil is consumed mainly by affluent and health-conscious consumers, notably adults. Younger generations are aware of the health benefit of olive oil and are willing to purchase good quality olive oil. Although the increasingly busier lifestyles have led to less incidence of cooking at home, olive oil and other edible oils with health benefit are considered key ingredients for cooking at home, especially among health sensitive young consumers.

Segmentation in consumer preferences for olive oil is still in a consolidation phase in Colombia, as consumers are not strongly aware of the differences between olive oil qualities and are just beginning to learn about the origins and varieties. Olive oil players in Colombia tend to differentiate between cooking olive oil and table olive oil for salads and dressings helping to reduce consumers' confusion, rather than to identify varieties as extra virgin, virgin, lampante, etc. as Colombian consumers do not generally distinguish the difference. In reality the majority of the offer in the market is of extra-virgin varieties with a brand such as Olivetto and Gourmet playing in this space. There is a widely held belief that olive oil is not suitable to fry in, though manufacturers did not respond with clear and accessible information.

In terms of preferences, Colombian consumers usually purchase **mildly sweet, full-bodied olive oil, or bitter-strong flavoured olive oil depending on their end-use**. However, players are increasingly positioning their olive brands to have an intense and soft flavour. Nevertheless, the most consumed types of olive oil in Colombia are *arbequina*, *hojiblanca* and *picual*.

Advertising and marketing strategies

Advertising campaigns are increasingly putting a lot of emphasis on the nutritional properties of oils. These campaigns are generally made through television and written press. Internet is also being used increasingly to promote olive oil by giving information about its nutritional value. Team Foods Colombia places importance on active advertising campaigns and has an active webpage with a modern design and detailed information about its products. The firm also follows a segmentation strategy, such as with its Gourmet brand, where the "Familia" (family) format is targeted to children and young-adults while the Canola format is targeted to seniors. Similarly, Gourmet from Team Foods Colombia launched a television spot, which focuses on the content of vitamins and omega oils and their health benefits. During the show, a doctor gives the backing of Fundación Cardio Infantil (a very prestigious clinic, which

⁷⁴ Euromonitor International: Packaged Food, 2019

⁷⁵ What to eat in Colombia – an Insider's guide to Colombia's food; <http://www.viaggiare-low-cost.it/en/what-to-eat-in-colombia/>

specialises in heart disease). A special chapter was dedicated to olive oil for the first time in the 13th edition of Expovinos in 2018; the most important vine fair organized by the supermarket chains Exito and Carulla.

Private label brands and offerings has been an important strategy to increase sales through more accessible prices. Some supermarket chains like Exito import olive oil in tanks and bottles it in Colombia.

Drivers and method of consumption

Consumption of olive oil in Colombia is mainly driven by healthy image of the product and associated values. The increasing interest of consumers in health and wellness impacts favourably popularisation of olive oil among Colombians, however in comparison to other edible oil, its consumption still remains low. Olive oil has been increasingly used in cooking as well as used as dressing.

Purchase criteria

In terms of purchasing olive oil, the main criteria can be identified as follows:

- **Health consciousness:** Colombians prefer edible oils that are considered healthier. More health-conscious and affluent consumers tend to pay great attention to quality of olive oil – in this case many producers try to emphasize health-added value of the product by displaying nutritional benefits, e.g. vitamins, Omega fatty acids etc.
- **Price:** High prices remained a barrier for the expansion of olive oil consumption in Colombia for a long time, nonetheless consumers are now benefiting from an increasing offer in a wider price range, including private label, which has helped to popularise olive oil in the country. While discounters are lagging in terms of offerings due to the “premium” perception of olive oil, warehouse clubs such as PriceSmart became important sellers of olive oil in large-sized PET bottles and with relatively attractive prices, helping to add dynamism to the category. 6 out of 10 households that consume olive oil are from high-income groups and 37% of the sales are made at discount stores. Please see the box below for more information on pricing.
- **Location:** Olive oil is bought primarily in regional capitals like Bogotá, Medellín, Cali, Barranquilla and Bucaramanga because the majority of its distribution takes place through supermarkets and delicatessen shops, which are found in big cities. 60% of olive oil sales are concentrated in Bogotá.

Olive oil on Colombian retailers' shelves...

Despite the predominance of other types of vegetable oils, olive oil is present on Colombian shelves in different formats, mostly in glass/plastic bottles of 250, 500 ml and 1 L.

Regarding prices and market segments:

- Most products on the market target the mid segment and retail somewhere between EUR 7 and EU 15 equivalent per litre
- A few products targetting the economy segment at prices below this can be found.
- There are premium products with retail prices from 15 EUR per litre upwards on the market, with the range of prices vast (e.g. products with retail prices in excess of 40 EUR equivalent per litre can be found)

Organic olive oils can be found on the market and they are more likely to be premium products. In general, premium and higher mid range products are more likely to use certifications, claim and certain marketing messages (e.g. various organic certifications, GMO free certification, cold pressed, 100% pure, 100% from country X) than lower mid range and economy products.

EU GIs can also be found on the Colombian market. For example, at Jumbo, a 500 ml Greek Kalamata olive oil bottle can be purchased for COP\$ 24 590, or less than EUR 7. Spanish olive oil is the overall dominant origin of oil on the market.





Pictures: © Agra CEAS / Euromonitor International, 2019.

Extra-virgin olive oil is overall the most common varieties on Colombian supermarkets' shelves. Flavoured olive oil (with garlic, basil, lemon, or chili) can also be found. Olive oil is occasionally sold in metal containers and spray bottles as well as the more typical glass bottles.

5.5.2.3 Recent market trends

Olive oil has been gaining more popularity, as more and more consumers are familiarizing themselves with health-added value of the product as well as usage of it. As described in section 5.5.2.1, consumption of olive oil is expected to increase in the following years. It should be noted that some retail stores and local edible oil producers have started marketing their brands using imported olive oil, with olive oil imported in bulk from e.g. Spain and bottled in Colombia by these local companies.

5.5.3 Offer

5.5.3.1 Domestic production

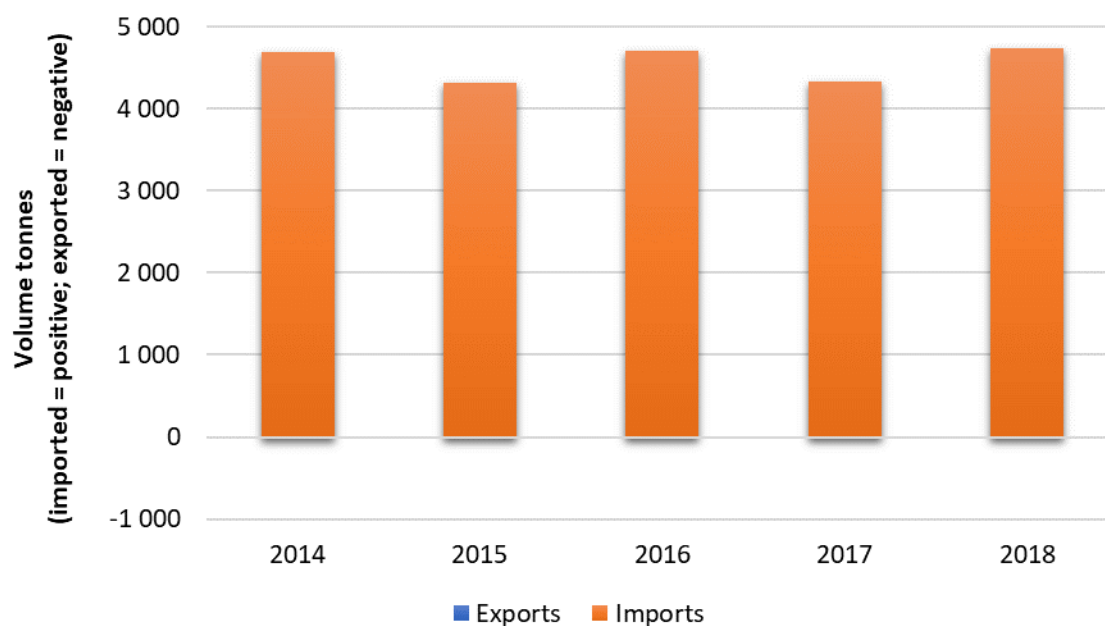
Colombian olive oil market almost entirely relies on imports, with no significant domestic production⁷⁶, which is mainly treated as artisanal. Areas around Villa de Leyva constitute the one the regions, where some small-scale olive oil production can be found.⁷⁷

5.5.3.2 Imports and exports

As presented in Figure 5-20, Colombia relies heavily on imported olive oil. Import volumes have fluctuated slightly and amounted to slightly above 4700 tonnes in 2018. Almost 90% of imported olive oil in Colombia comes from Spain (Figure 5-21), with minor volumes from Italy and Argentina. Some of the largest Spanish brands available in supermarkets are Carbonell, La Española, Rafael Salgado y Ybarra.

In terms of per unit value of imported olive oil, Spanish prices reflect the world prices, whereas Italian per unit value reached 5 000 EUR per tonne in 2018 and exceeded Spanish value in comparison to 2017.

Figure 5-20: Trade balance (imports and exports) of olive oil in Colombia, 2014-18; tonnes

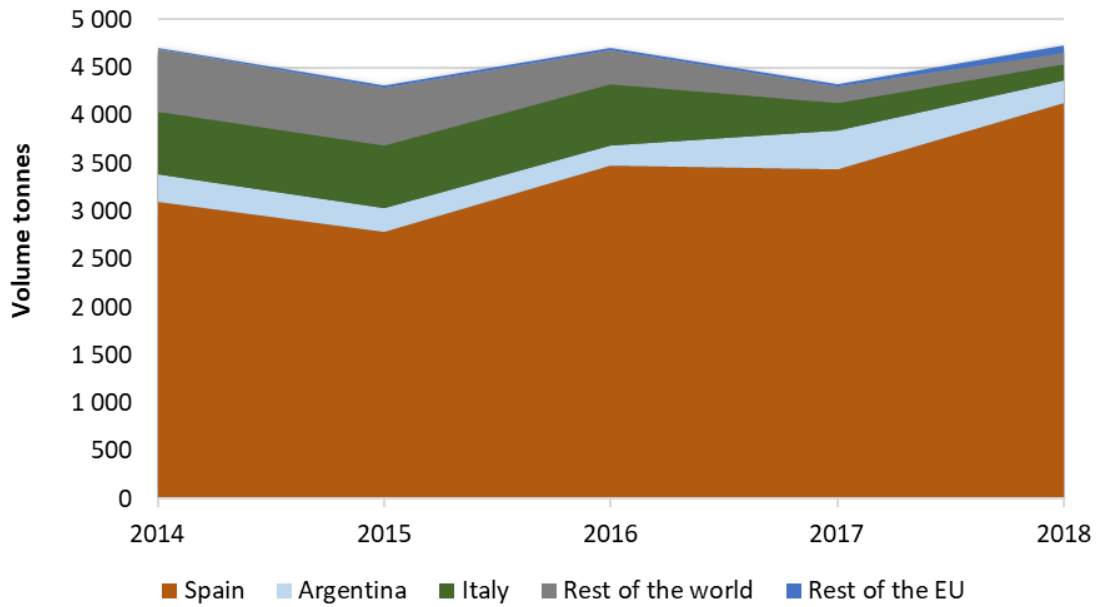


Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN code 1509.

⁷⁶ Negocio del aceite de oliva va al alza, pero aún es muy pequeño ; <https://www.dinero.com/empresas/articulo/negocio-del-aceite-de-oliva-en-colombia-en-2018/261295>

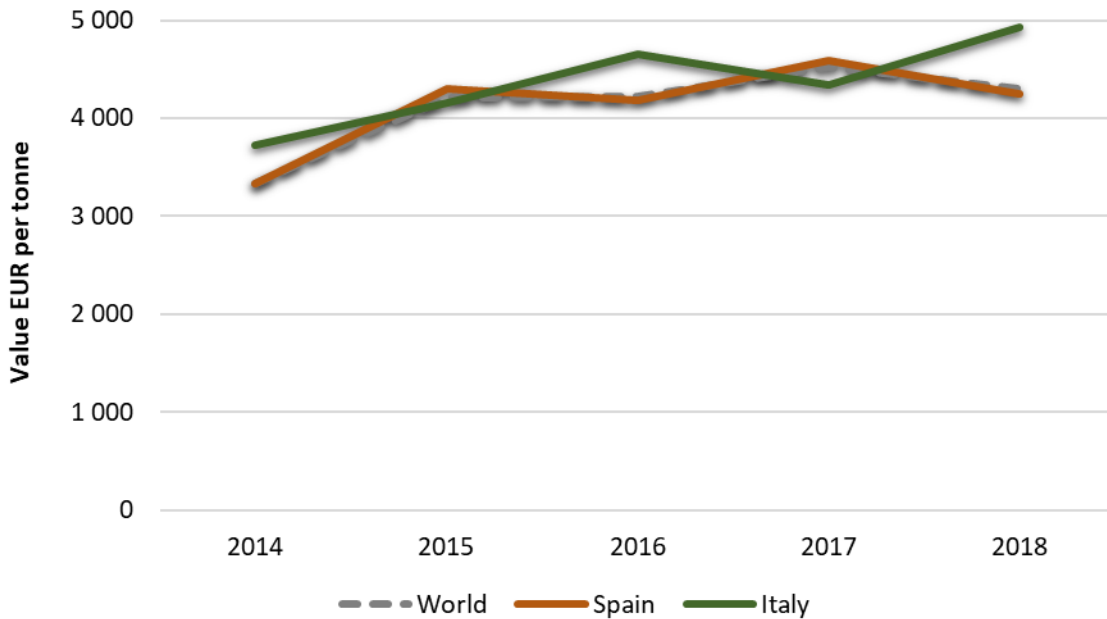
⁷⁷ A brief history of olive oil in Colombia; <https://www.oliveoiltimes.com/olive-oil-basics/olive-oil-colombia/39097>

Figure 5-21: Colombian imports of olive oil by country, 2014-18; tonnes



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
 Data for CN code 1509.

Figure 5-22: Per unit value of Colombian imports of olive oil for selected EU countries, 2014-18 (EUR per tonne)



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
 Data for CN code 1509.

5.5.3.3 EU GI products

As reported in section 9, under the EU-Colombia and Peru Trade Agreement, several products are set recognised as Geographical Indications in Colombia, including two olive oil products:

- France: *Huile d'olive de Haute-Provence*,
- Portugal: *Priego de Córdoba*.

5.5.3.4 Main competitors

As described in section 5.5.3.2, Colombian market relies on imported olive oil, given the fact that domestic production is marginal. Moreover, imported products in vast majority come from European countries, especially Spain, followed by Italy.

5.5.4 Specific market entry requirements

Market Access and Entry

As described in section 4.2.1, European producers should register their products with the INVIMA and MINICOMEX⁷⁸. Furthermore, products must comply with the Law 9 of 1979 on imports of food products, (see section 4.2.2). Producers should be also mindful of other necessary documentation (detailed Table 4-2), such as:

- Certificate of Analysis,
- Authorisation of foreign Foodstuffs Producers,
- Preliminary Import Registration,
- Sanitary Registration of Foodstuffs.

Detailed information on import duties and Rules of Origin can be consulted on the European Commission website:

https://madb.europa.eu/madb/datasetPreviewFormATpubli.htm?datacat_id=AT&from=publi&hsc_ode=0402&countryid=CO

Customs procedures

A list of standard documents required for imported olive oil in Colombia is presented in section 4.2.1

Any other up to date information on appropriate documents concerning customs procedures can be consulted on European Commission website:

https://madb.europa.eu/madb/datasetPreviewFormATpubli.htm?datacat_id=AT&from=publi&hsc_ode=0402&countryid=CO

SPS measures

⁷⁸ In accordance with Decree 3075/1977, the following products are not subject to registration: (a) non-transformed chilled and frozen animal-origin food products, (b) non-transformed natural food products, and (c) raw materials for food preparation.

All sanitary and Phytosanitary measures concerning the import of are in line with international standards. It should be pointed out though that additional documentation might be required (as per Table 4-2).

Up to date information on appropriate documents concerning SPS measures:

https://madb.europa.eu/madb/datasetPreviewFormATpubli.htm?datacat_id=AT&from=publi&hscode=0402&countryid=CO

Labelling

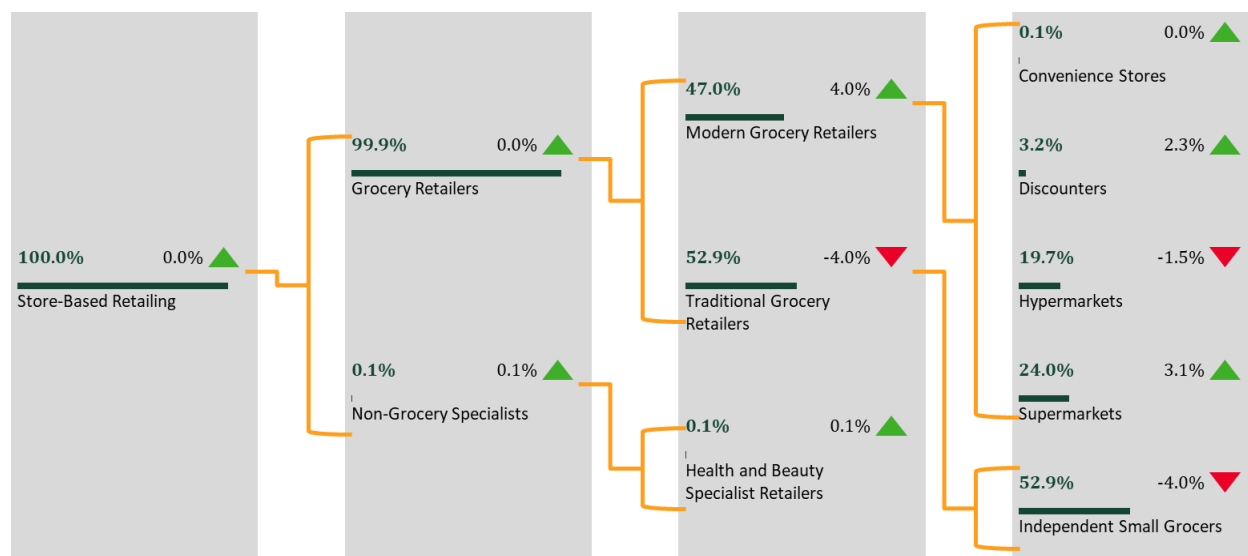
As described in more detail in section 4.2.3, all imported dairy products must be labelled in line with:

- Regulation in terms of labels or labels requirements (Resolution 5109 of 2005).
- Requirements for labelling or labels regarding additives (Resolution 1506 of 2011).

5.5.5 Distribution

As indicated in Figure 5-23, store based retailing was the leading retail channel for edible oils as a whole (including olive oil), with recent increases in modern grocery retailers' shares. However, in 2018, over half of edible oils was distributed via independent small grocers. Sales of edible oils in the second biggest channel -supermarkets - picked up in comparison to the previous year, whereas distribution through hypermarkets dropped. That said, the specific category of olive oil is mainly distributed through modern grocery retailers, e.g. hypermarkets⁷⁹.

Figure 5-23: Distribution channels overview of edible oils (including olive oil) in Colombia (2018); retail value



Source: Euromonitor International: Packaged Food, 2019.

⁷⁹ Negocio del aceite de oliva va al alza, pero aún es muy pequeño; <https://www.dinero.com/empresas/articulo/negocio-del-aceite-de-oliva-en-colombia-en-2018/261295>

5.5.6 Challenges for EU products

Lack of knowledge about the use of olive oil, especially cold/raw, might constitute the greatest challenge for European producers. In general terms, Colombian consumers have a strong preference for other edible oils, such as palm and soybean oil. Effectively olive oil is purchased only by a narrow group of health-oriented, wealthier consumers as well as expats.

Market Takeaway: Olive oil

Consumption: Consumption of olive oil has been increasing, however Colombian consumers have other preferences concerning edible oils. However, olive oil has a positive image and is known for its health-added value.

Competition: The European companies dominate the olive oil market, especially Spanish, followed by Italian. Domestic production is marginal.

Distribution: Independent small grocers are leading distribution channel concerning edible oils, including olive oil. However, the role of supermarkets is on the rise.

Challenges: Most Colombians are not aware of the use of olive oil, especially cold/raw. Vast majority choose other edible oils for cooking.

Opportunities: Positive and healthy image of olive oil. Market relying on imports from European countries.

5.6 Chocolate and confectionery

5.6.1 SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ Colombians have a taste for drinkable chocolate, which is consumed at breakfast and as part of a snack. ▪ EU products enjoy a high reputation. ▪ The tradition of gifting chocolate confectionery at festive periods and on special occasions is culturally rooted. 	<ul style="list-style-type: none"> ▪ Per capita consumption of chocolate and confectionery is rather low in Colombia. ▪ Hard confectionery is increasingly associated to dental problems. ▪ Consumers are moving to healthier alternatives of confectionery, such as yoghurt.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ Consumption of chocolate and sugar confectionery is expected to grow in the future. ▪ Children and adolescents have a taste for chocolate bars and sugar confectionery. ▪ The health and wellness trend benefits products with e.g. reduced calories and sugar content. 	<ul style="list-style-type: none"> • Colombia's production of high quality chocolate and confectionery products is considerable. • US and Mexico shipments, amongst others, account for most imports into Colombia. • EU exporters of chocolate face relatively high tariff barriers, including tariff quota. • Proposal for front of pack nutritional labelling exists, with discussions ongoing.

5.6.2 Consumption

5.6.2.1 Evolution of consumption

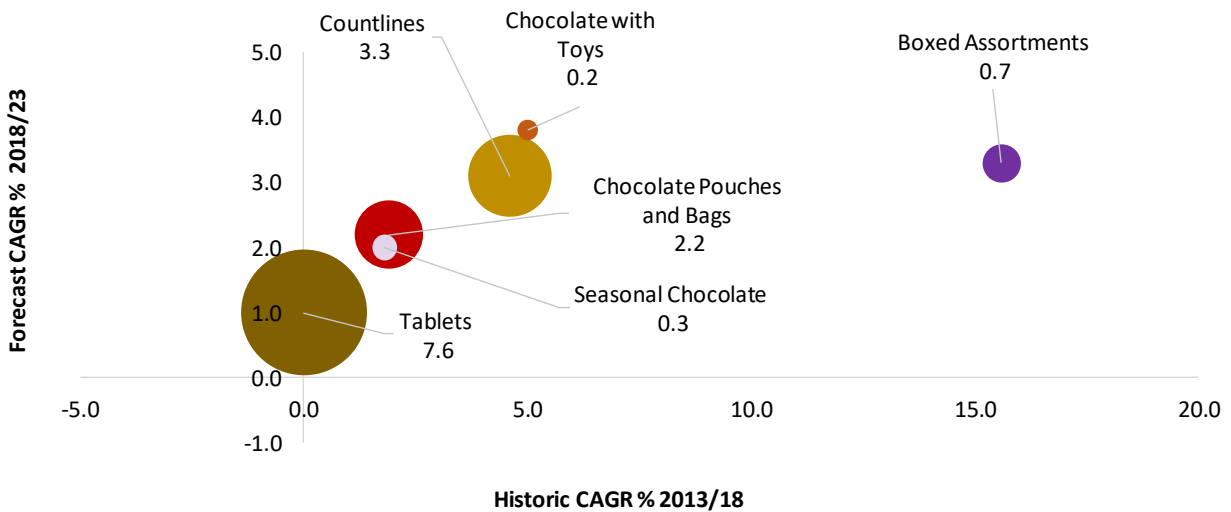
As illustrated in Figure 5-24, **consumption of chocolate in Colombia has tendentially expanded** in 2013-2018, with some differences between sub-categories. On the contrary, **sugar confectionary consumption grew at negative rates** in the same period, although it is projected to see moderate recovery in the future (Figure 5-25). The negative performance of sugar confectionary is attributable to the current health and wellness trend in the country, with several consumers moving to healthier alternatives to sugar snacks, such as yoghurt.

Most notably, as indicated in Figure 5-24, the chocolate confectionery category recorded a positive growth for the period 2013-2018, up to 15.6% in the boxed assortments segment. Tablets are the only category where growth stagnated. However, consumption of chocolate was rather limited in 2018, amounting to 14 300 tonnes. Tablets accounted for over half total sales in the category (7 600 tonnes), followed by countlines (23%), chocolate pouches and bags (15%), and boxed assortments (5%). Beyond the categories indicated in Figure 5-25, Colombians consume large volumes of drinkable chocolate.

Consumption of sugar confectionary was 46 100 tonnes in 2018. Notably, approximately 16 500 tonnes of lollipops were purchased. Gum and boiled sweets were other popular segments in the sugar confectionery category, accounting for respectively 14% and 13% of total consumption, followed by other sugar confectionary (11%) and toffees, caramels and nougats (10%).

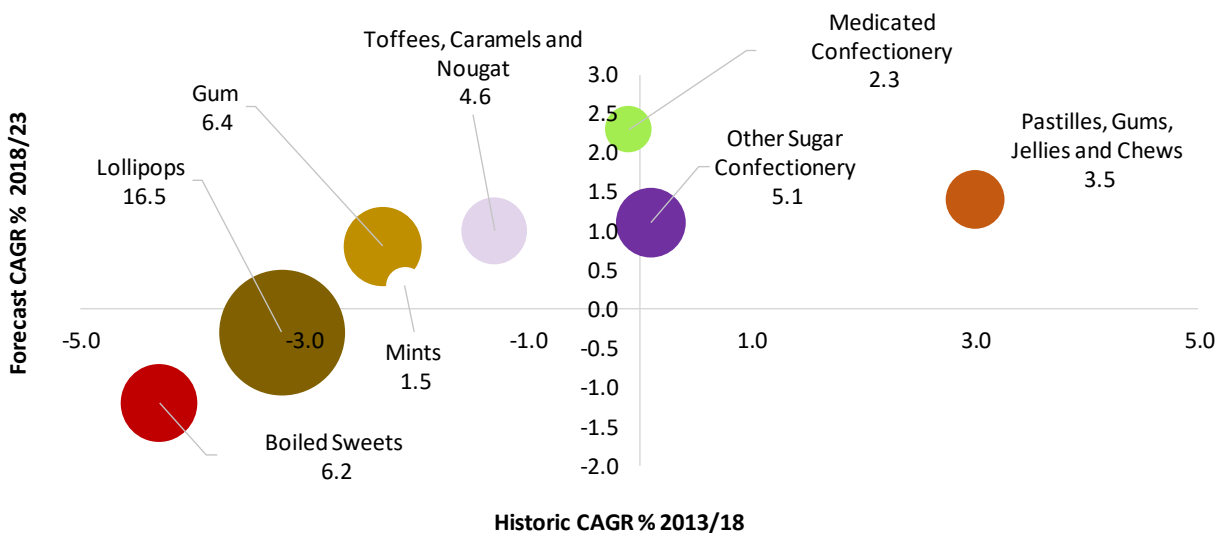
Per capita consumption of sugar and chocolate confectionery is nevertheless weak, as the average Colombian consumer purchases less than 0.8 kg sugar confectionery per year. Per capita consumption of chocolate confectionery is even lower; in 2018, per capita consumption of chocolate confectionery reached its peak (0.2 kg) in the tablets segment.

Figure 5-24: Evolution and forecast of chocolate confectionery market in Colombia, 2013-2023; total volume



Source: Euromonitor International: Packaged Food, 2019.

Figure 5-25: Evolution and forecast of sugar confectionery market in Colombia, 2013-2023; total volume



Source: Euromonitor International: Packaged Food, 2019.

5.6.2.2 Consumer profile and purchase criteria

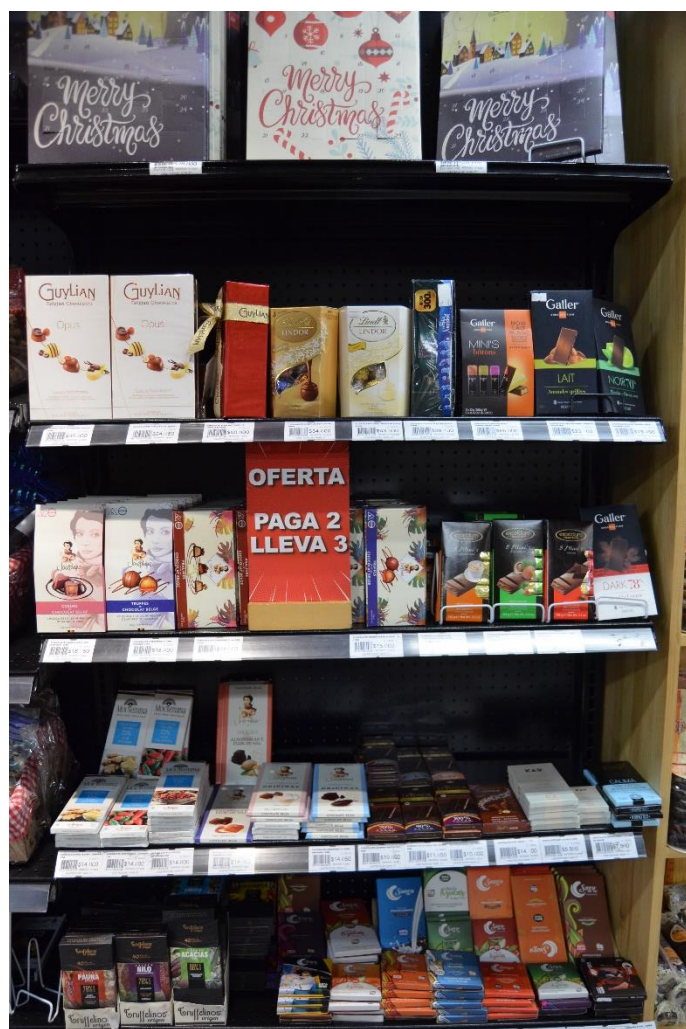
Although Colombia is a very famous cocoa producer, consumption of chocolate is rather limited. Sales of sugar confectionery are slightly higher, but still low compared to other countries. In general, the sector is facing a period of challenges, as consumers are more health-conscious, hence less oriented towards products in this category.

Consumers

In Colombia, **consumption of chocolate is focused on drinkable products**. Chocolate is rather seen as an alternative to coffee; this beverage is indeed drunk both at home or outside, in company of friends and family. Around 1.5 billion cups of chocolate are sold per year, mostly amongst adults. Children and

adolescents, on the other hand, have a taste for chocolate bars and sugar confectionery.⁸⁰

EU chocolate brands are mostly purchased by high-income consumers, as these products are usually pricey.



Imported chocolates in a gourmet retailer, with a 3 for 2 special offer.
© Agra CEAS / Euromonitor International, 2019.

In general, the country is facing a **health and wellness trend which is threatening the consumption of sugar confectionery**. Parents, educational groups and the health authorities are increasingly concerned about the impact of sugar products on children's health. For example, hard confectionery is more and more associated with dental problems. A campaign by Red PaPaz, a non-profit organisation that protects the rights of children and adolescents, condemns the widespread advertising of sweets. Moreover, the government plans to introduce labelling regulations on the content of sugar and fat in packaged food. In general, consumers tend to be more aware of what they consume. As a result, **consumers are more interested in products with lower content of sugar and fats, as well as higher percentages of cocoa or fruit**. At the same time, it can be observed

⁸⁰ Chocolate seeks to position itself as a drink in Colombia, <https://www.elespectador.com/noticias/economia/el-chocolate-busca-posicionarse-bebida-colombia-articulo-664970>

that consumers are moving to products that are considered healthier and more nutritious alternatives to sugar snacks, such as dairy desserts and yoghurt (see also section 5.2.2 above on Dairy products).⁸¹

Drivers and method of consumption

Colombians have a preference for drinkable chocolate, that they enjoy as part of a snack that comes with an arepa or a piece of bread. Sometimes, Colombians also have a cup of hot chocolate at bakeries with the main dish.⁸² Regarding chocolate in confectionery form (i.e. to eat), EU products are perceived to be of better quality than the locally produced ones. This perception has recently started to be challenged with the introduction of premium national players, like Santander and Dolcevita. Nonetheless, the local offer of premium chocolate is still new and relatively expensive; therefore, it has not negatively affected the good perception of imported chocolates.

Chocolate confectionery sales experience strong seasonal fluctuations. Consumers in Colombia often increase their purchases and consumption of chocolate confectionery at specific times of the year, as these products are an integral part of Colombian celebration and culture. The main sales peaks include holiday periods like Christmas and Easter, as well as the lead up to special occasions, such as Valentine's Day in February and The Day of Love and Friendship in September, Mother's Day and Father's Day. The tradition of **gifting chocolate confectionery at festive periods and on special occasions** is the main driver for purchases of those products, and may provide a particular boost to imported chocolates sales as they are often seen as premium.

With regard to sugar confectionery, consumers have started to move to softer products, as hard confectionery is increasingly associated to dental problems. Demand for lollipops with gum inside is falling even faster, partly because of the restrictions on consuming gum in schools. In general, driven by a health and wellness trend, consumers are moving towards sugar-free products.⁸⁴ Also retailers are assuming a more active role in recommending products which may be "healthier" for consumers. In this regard, premium retailer Carulla is making inroads by offering products with a "*Bueno para ti*" (Better for you) label in its outlets. This caused controversy, as it is not clear if the strategy responds to commercial agreements with manufacturers, or how they are carrying out the evaluation to decide to endorse a brand or product with this label.

Sugar confectionery is strongly dependent on seasonal celebrations, with Halloween and Christmas being the most important. Sugar confectionery generates 40% of its annual sales on days before and after Halloween. During the festive period, consumers prefer more premium imported products, with kits, large

⁸¹ Euromonitor International: Packaged Food, 2019.

⁸² The cultural significance of chocolate in Colombia, https://www.wildfrontierstravel.com/en_GB/community/blog/post/the-cultural-significance-of-chocolate-in-colombia

⁸³ One really important thing you should know about hot chocolate in Colombia, <https://www.flavorsofbogota.com/hot-chocolate-in-colombia/>

⁸⁴ Euromonitor International: Packaged Food, 2019

tablets and artisanal chocolate confectionery expected to regain traction as a gift option over the upcoming years.

Purchase criteria

Currently, driven by high diabetes rates and a general wellness and health trend, consumers are increasingly switching to products that are considered healthier and more nutritious. Notably, a higher percentage of pure cocoa in chocolate, as well as lower sugar content in confectionery are two significant purchase criteria in the category. However, wealthy consumers place value in quality and hence appreciate EU premium chocolate, which is usually given as fine gift.

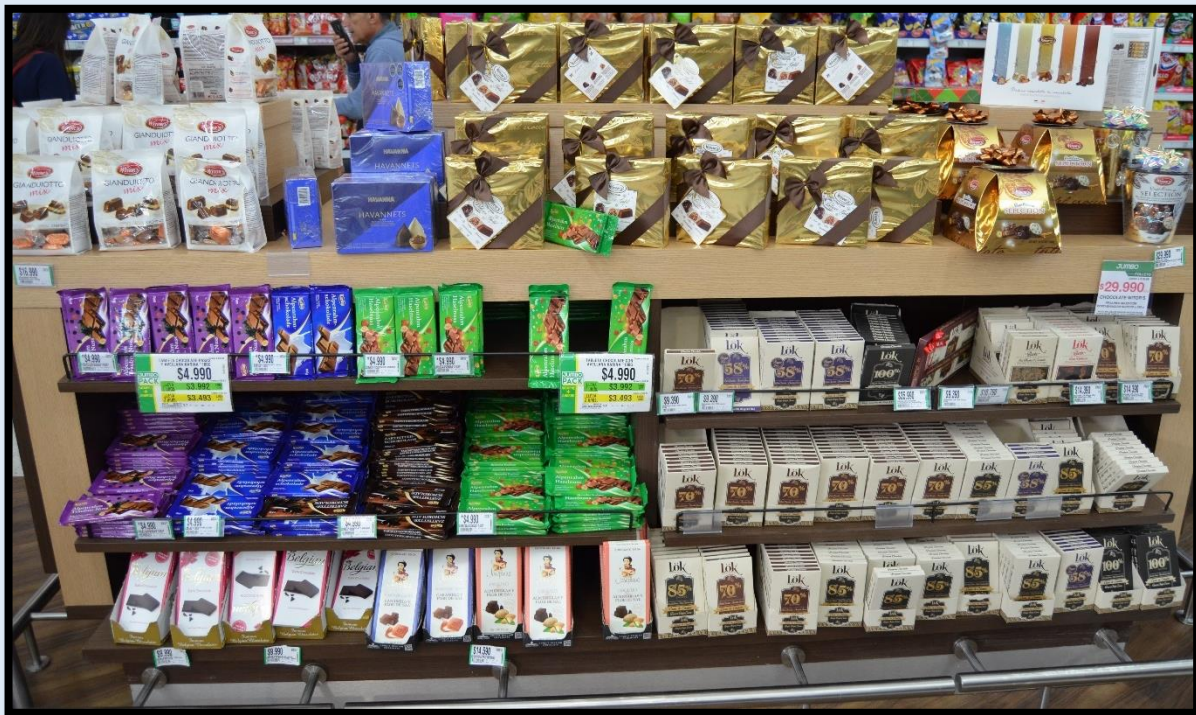
On top of that, innovation remained important in terms of attracting consumers, as outlined below:

- **Sensorial experiences:** Although chocolate confectionery with fruits and seeds is nothing new in the Colombian market, such variants are gaining prominence as consumers are looking for new taste experiences. Fruit or stevia are increasingly being seen in the category as manufacturers seek not only to improve their health and wellness credentials but also offer consumers a better organoleptic experience.
- **Bitter chocolates:** Consumers are becoming increasingly willing to try more bitter products. Thanks to a wider promotion of features like the antioxidants of the chocolate through printed/digital media, and after the participation of the Mexican chocolate expert chef, José Ramón Castillo, in the local version of Master Chef, consumers are increasingly looking for more cacao and less sugar.
- **Large pack sizes:** Premium chocolate with a designated origin is gaining traction in the Colombian market, with these products being offered in larger formats for either individual consumption or sharing. For example, with its traditional Jumbo brand, Cía Nacional de Chocolates is offering large-sized packs of over 200g to share for new variants such as Jumbo Dulce de Leche and Jumbo Cracker, with some being limited editions.
- **Intense flavours:** In an effort to maintain consumers' interest, local gum manufacturers are focusing on offering new flavours. For example, they are developing longer-lasting sweet and sour flavours with fillings or crystals in combinations such as watermelon and grape to complement their traditional spearmint, mint and cinnamon variants. Stronger citrus flavours are preferred due to their more intense mouth feel.
- **Packaging:** To reduce prices, many private labels have started using folding cartons instead of rigid containers in boxed assortments, slightly reducing pack sizes or reformulating products, with this benefiting brands offered in mini formats in boxed assortments and chocolate pouches and bags. Similarly, Ferrero Rocher offered rigid plastic, flexible plastic and folding carton options in boxed assortments so as to cater for those on different budgets. Small three-unit size in flexible plastic was its best-selling format in 2018.
- **Chocolate with toys:** In this segment, which is growing at fast rates, Kinder Sorpresa is the only leading brand thanks to its strategy to expand the product's presence both in modern and traditional retailers.
- **Cookies and Cream:** White chocolate with cookies and cream flavour is gaining notice in Colombia due to its extensive use by different brands in several categories.

Chocolate and confectionery on Colombian retailers' shelves...

Several types of EU chocolate and sugar confectionery products are available on Colombia's shelves, notably chocolate boxes, chocolate bars and packaged candies.

For imported chocolates, it is very hard to compete with local products in economy and medium segments, so the majority of EU imported chocolates focus on the premium segment. In a positioning as a premium product, the price range is generally between COP\$ 175 000 and 250 000 (or EUR 45 and EUR 64) per kilo. Imported products are not restricted to boxed assortments – tablets are common, and some pouches can also be found. It is possible to find some claims and certifications on imported products; these often relate to the origin of the milk, the cocoa content, absence of added sugar and UTZ or fair trade certification.





Imported sugar confectionery is more likely to target the mid-range, and unlike chocolate, is more likely to be displayed alongside local products.

Certain retailers offer sales promotions on imported products, such as three or four for the price of two or discounts. Also thematic packages are available, i.e. Christmas chocolate boxes.

5.6.2.3 Recent market trends

Overall, sales within the chocolate category are projected to continue to grow at different rates over the next few years. Notably, total consumption of tablets is predicted to recover from stagnation, growing by a CAGR of 1%. However, growth in most other segments is projected to slow down when compared to previous years. This is particularly the case of boxed assortments, whose double-digit positive growth is expected to go down to 3.3%. On the contrary, most sugar confectionery segments are set to recover. Boiled sweets and lollipops are the only two segments which are predicted to record a negative performance within the next few years. As noted above, health and wellness concerns are both driving consumers away from harder sugar confectionery towards softer types, which are seen as less dentally damaging; and towards sugar-free products. Low sugar, functional pastilles have been launched by one company in an effort to take advantage of this trend; and soft lollipops with perceived healthier ingredients like yoghurt and popular flavours such as rum with raisins are expected to perform well over the coming years due to an increased focus on health.

5.6.3 Offer

5.6.3.1 Domestic production

Colombia is one of the largest cocoa producers in the world and **relatively large volumes of chocolate and sugar confectionery are manufactured every year**. Notably, within the chocolate category, Colombia is a heavy producer of sweet chocolate (41 278 tonnes, in 2017), chocolate candies (39 283 tonnes), and powder products flavoured with chocolate, which are used for drinking chocolate (22 657 tonnes). Within the sugar confectionery category, Colombia's major production volumes are candies (85 741 tonnes, in 2017), sweet and lollipops (34 042), as well as gums and marshmallows (20 795 tonnes). In terms of value, in 2017, chocolate products recorded a higher value compared to sugar confectionery.

Table 5-3: Chocolate and sugar confectionery production volume and value, 2017

Product	Volume, tonnes	Value, 000 EUR
Chocolate		
Bitter chocolate	5 588.6	23 948
Sweet chocolate	41 277.9	78 972.85
Chocolate powder	7 422.9	22 863
Powder products flavoured with chocolate	22 656.9	83 438.32
Concentrated chocolate	7.4	26
Chocolate candies	39 282.7	137 356.88
Sugar confectionery		
Candies	85 740.6	156 302.37
Sweets and lollipops	34 041.9	59 346
Gums and marshmallows	20 795.2	48 298.38
Chewing gum	4 306.4	11 738

Source: Agra CEAS based on DANE figures.

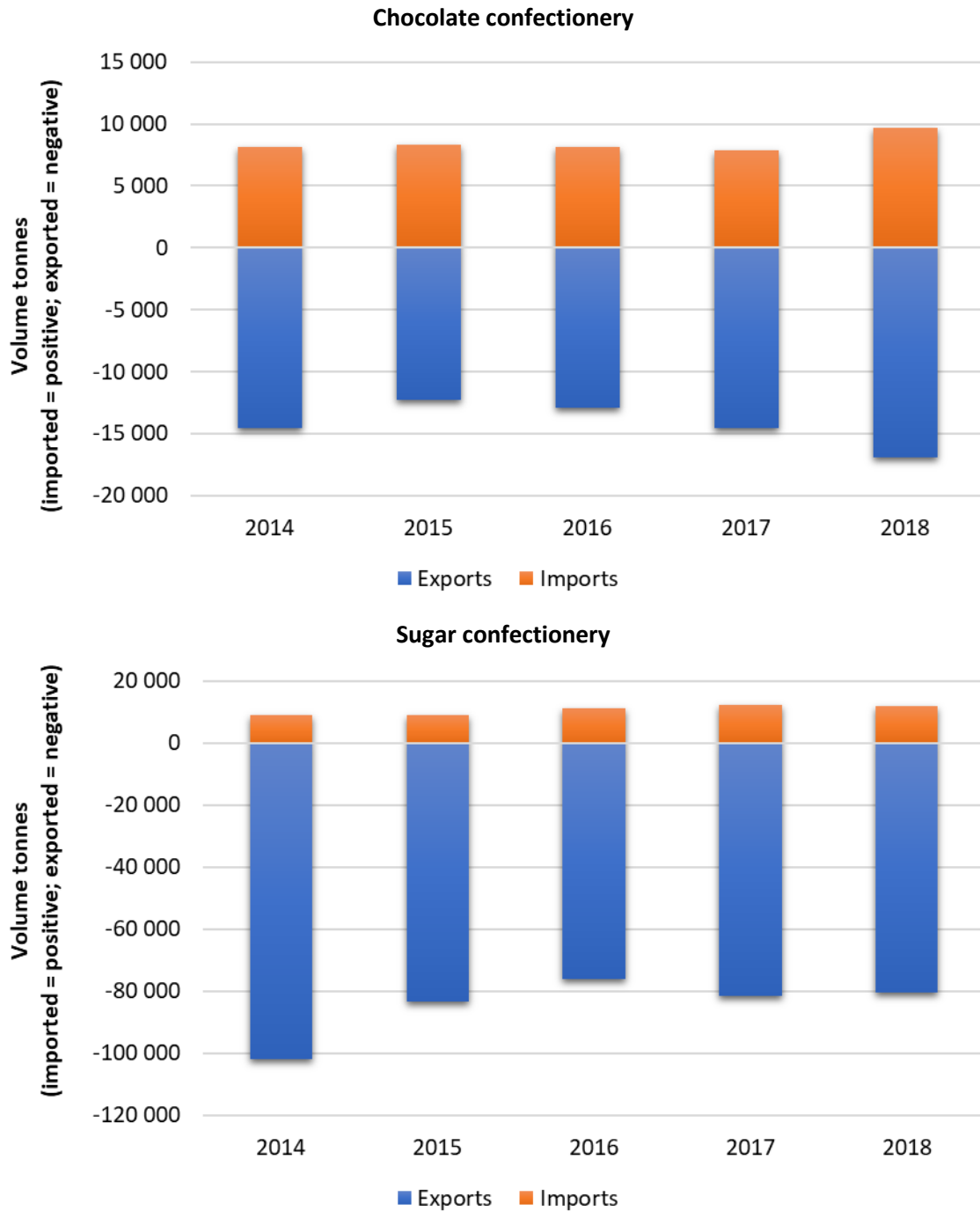
5.6.3.2 Imports and exports

As observed in section 5.6.3.1 above, Colombia's production of chocolate and sugar confectionery exceeds local demand for these products. For this reason, Colombia is a net exporter of both chocolate and sugar confectionery Figure 5-26. Although **imports in both categories have shown increasing trends**, imported volumes remain rather limited. Notably, in 2018, 9 726 tonnes of chocolate and 11 750 tonnes of sugar confectionery were imported.

As outlined in Figure 5-27, **chocolate items are mostly supplied by the United States** - which accounted for nearly 38% of total imported volumes in 2018. Germany, Turkey and Mexico followed; combined these account for a third of total imports by volume. Other EU countries accounted for another 7.7% of shipments to Colombia, and over half of this came from Italy. **With regards to sugar confectionery, Mexico was the largest supplier** in terms of volume, accounting for almost 60% of Colombian imported volumes in 2018. Amongst the EU countries, only Spain stood out, with 11% of total shipments by volume, which made it the second largest exporter of sugar confectionery to Colombia, after Mexico.

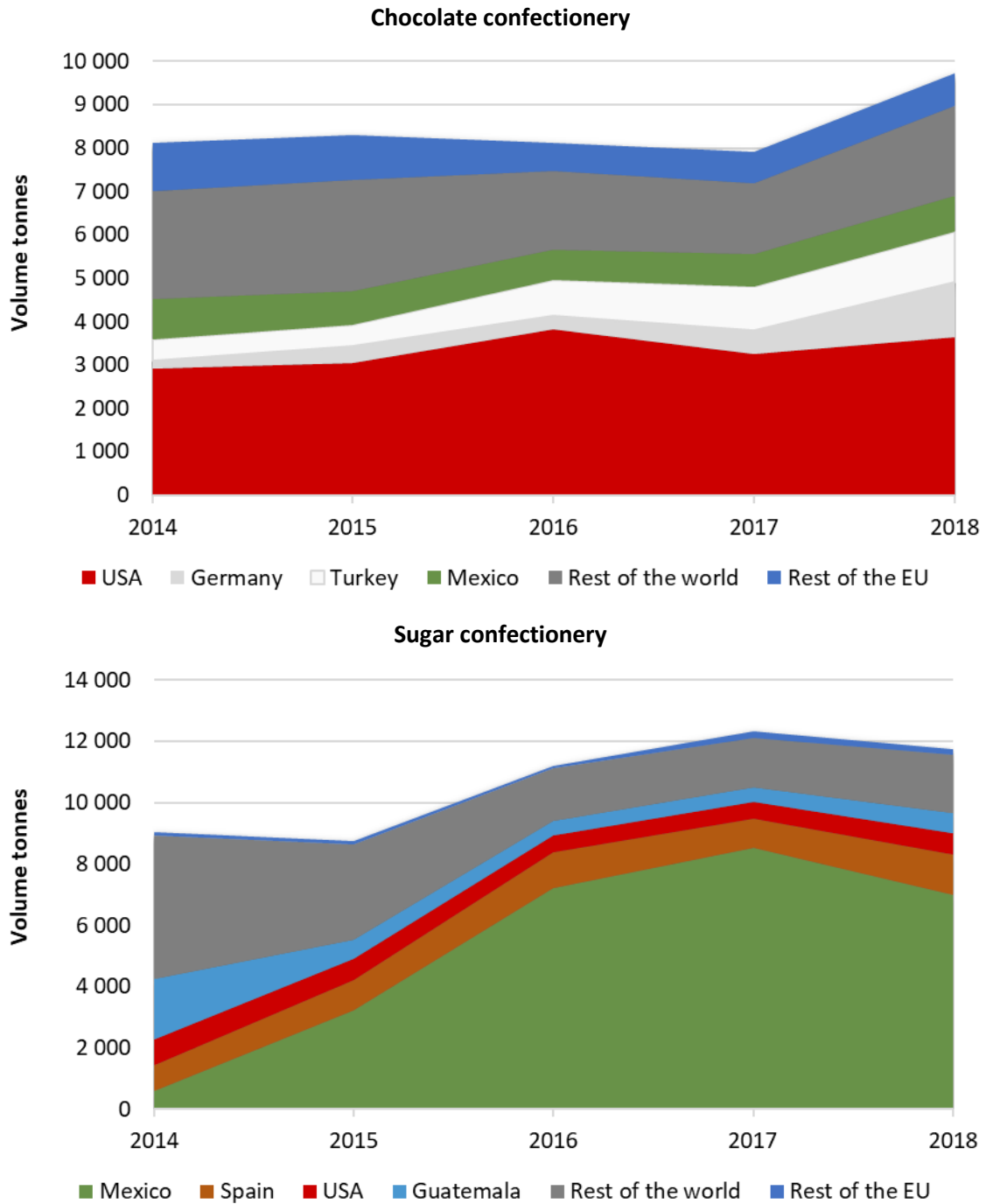
Mexico and USA were also the largest exporters of sugar confectionery and chocolate in terms of value. As outlined in Figure 5-28, per unit value of German imports of chocolate stood at 2 644 EUR/tonne, well below the average of chocolates imported into Colombia (4 407 EUR/tonne). On the contrary, Italian exports, which have been growing since 2016, recorded a higher per unit value, amounting to 6 487 EUR/tonne. Concerning sugar confectionery, the unit value of Spanish imports (2 437 EUR/tonne) was below average. German exports, on the contrary, were highly valued. However, they only account for a small share of total exports by volume.

Figure 5-26: Trade balance (imports and exports) of confectionery in Colombia, 2014-18; tonnes



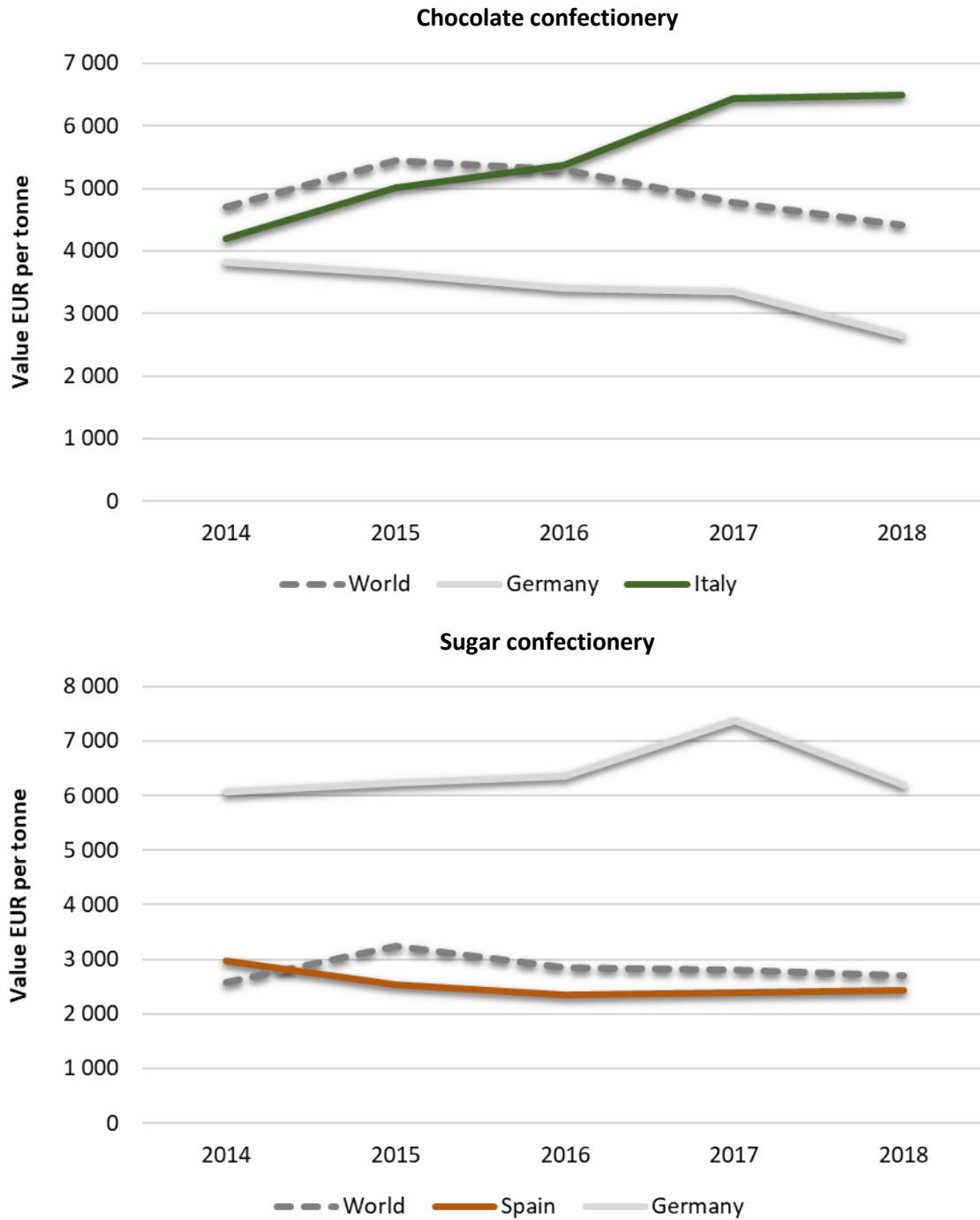
Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN code 1806 and 1704.

Figure 5-27: Colombian imports of confectionery by country, 2014-18; tonnes



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
 Data for CN code 1806 and 1704.

Figure 5-28: Per unit value of Colombian imports of confectionery for selected EU countries, 2014-18 (EUR per tonne)



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
 Data for CN code 1806 and 1704.

5.6.3.3 Main competitors

As outlined in section 5.6.3.1, Colombia is a large producer of high quality cocoa and chocolate products. Similarly, the country is a great manufacturer of sugar confectionery. On top of that, USA and Mexico, which exports benefit from proximity to Colombia, are significant competitors in both categories.

In terms of market shares, Cía Nacional de Chocolates is the dominant player in chocolate confectionery in Colombia. The company continues to invest in new product development, with a focus on added value, such as the incorporation of ingredients like nuts, fruits and caramelised vanilla and crunchy rice. its portfolio is supported by an ongoing marketing campaign called “*Amo el chocolate*” (“I Love Chocolate”). There has also been an increasing focus on healthier options, not least through its health and wellness brand Choco Lyne, which is seeing strong retail value sales growth through the launch of novelties like small sugar-free tablets to satisfy chocolate cravings in a healthier way.⁸⁵

5.6.4 Specific market entry requirements

Market Access and Entry

As reported in section 4.2.1, confectionary producers must submit the Import Registration form to the MINCOMEX and pay duties in order to ship their products to Colombia. Imported products must comply with Law 9/1979, as well as all further food and safety rules, as described in detail in section 4.2.2.

In terms of tariffs, **EU producers of chocolate face relatively high tariff barriers, including tariff quota.** Notably, exports of sweetened cocoa powder (CN code 1806.10) and other chocolate preparations (under CN code 1806.20.90) face a 2.5% rate within a tariff quota of 7 867 tonnes for products with a sugar content of 70% or more. The tariff goes up to 15% when the aforementioned quota is exceeded. Products under CN codes 1806.31, 1806.32, 1806.90, however, benefit of reduced tariffs compared to MFN rates.

On the contrary, **most sugar confectionery products do not face any tariff**, under the EU-Andean Trade Agreement, except for goods under CN code 1704.90.90, which face a 15% tariff quota, when the quota of 7867 t for goods of a sugar content of 70% or more is exceeded.

Detailed information on import duties and Rules of Origin can be consulted on the European Commission website:

<https://madb.europa.eu/madb/atDutyOverviewPubli.htm?countries=CO&hscod=1806>

and

<https://madb.europa.eu/madb/atDutyOverviewPubli.htm?countries=CO&hscod=1704>

⁸⁵ Euromonitor International: Packaged Food, 2019.

Customs procedures

A list of standard documents required for import confectionery into Colombia is presented in section 4.2.1 (Table 4 1). Furthermore, as outlined in Table 4 2 in section 4.2.1, the following documents are requested to import chocolate and confectionery:

- Sanitary registration of foodstuff,
- Preliminary Import Registration,
- Authorisation of Foreign Foodstuffs Manufacturers,
- Certificate of Analysis.

Any other up to date information on appropriate documents concerning customs procedures can be consulted on European Commission website:

<https://madb.europa.eu/madb/datasetPreviewIFpubli.htm?countries=CO&hscod=1806>

and

<https://madb.europa.eu/madb/datasetPreviewIFpubli.htm?countries=CO&hscod=1704>

SPS measures

All sanitary and Phytosanitary measures concerning the import of chocolate and confectionery into Colombia are in line with international standards.

Up to date information on appropriate documents concerning SPS measures:

<https://madb.europa.eu/madb/datasetPreviewIFpubli.htm?countries=CO&hscod=1806>

and

<https://madb.europa.eu/madb/datasetPreviewIFpubli.htm?countries=CO&hscod=1704>

Labelling

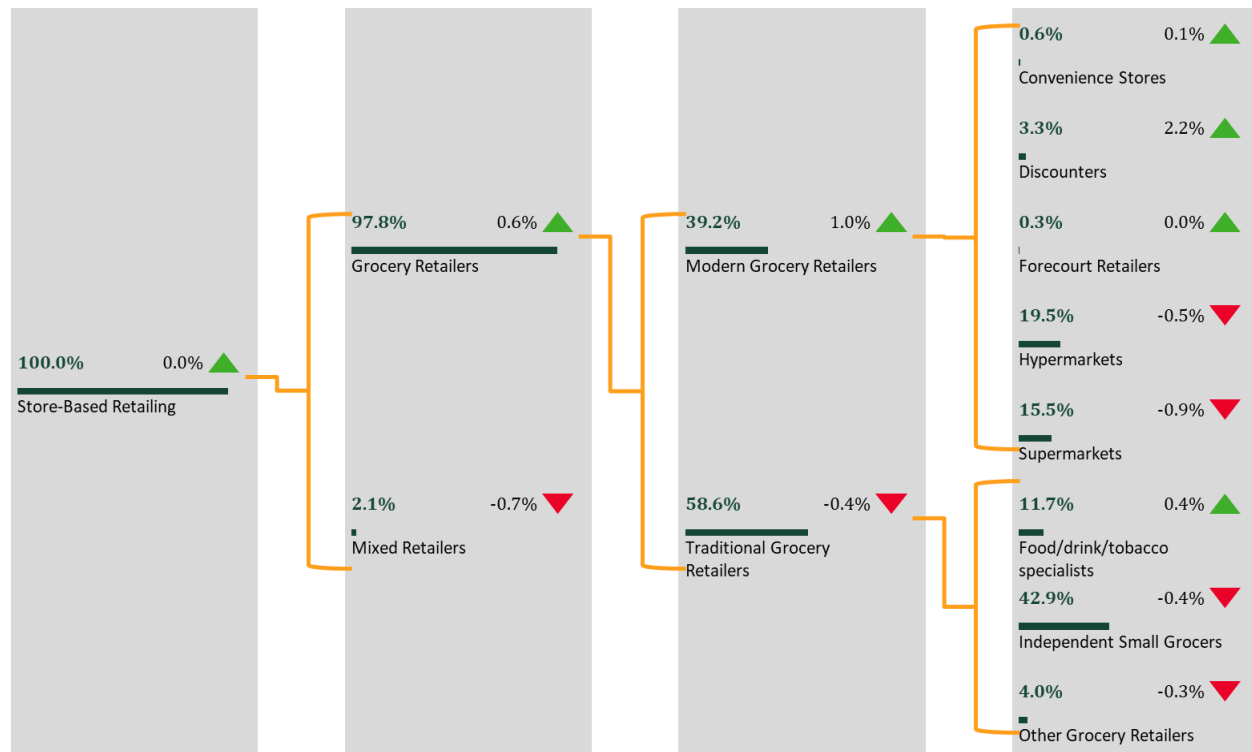
As described in more detail in section 4.2.3, chocolate and confectionery must comply with generic labelling rules, as provided for in Resolutions 5109/2005 and 1506/2011. Furthermore, the government also plans to introduce labelling regulations on the content of sugar and fat in packaged food; however, the proposal is at an early stage.

5.6.5 Distribution

As showed in Figure 5-29, the **distribution of chocolate and confectionery is highly fragmented**. However, it can be observed that **store-based retailing is the leading distribution channel**. Most notably, grocery retailers accounted for 97.8% of all sales, 58.6% of which were done through traditional grocery retailers (primarily independent small grocers), and the remaining through modern grocery retailers (mostly hypermarkets and supermarkets). Unlike traditional grocery retailers, which lost shares in 2018, modern grocery retailers recorded the highest growth in the sector.

However, due to the premium nature of imported chocolate, the main distribution channel for these specific products is hypermarkets (like Pricesmart) and supermarkets (like Exito, Carulla, Jumbo).

Figure 5-29: Distribution channel overview of all confectionery in Colombia (2018); retail value



Source: Euromonitor International: Packaged Food, 2019.

5.6.6 Challenges for EU products

Colombians are not heavy consumers of chocolate and sugar confectionery and this shows few signs of changing, as consumers tend to be more interested in their health and wellness. Furthermore, EU producers face the competition of domestic and international brands offered at affordable prices. Finally, EU chocolate products face comparatively high import duties.

Market Takeaway: Chocolate and confectionery

Consumption: Consumption of confectionery is increasingly affected by a general health and wellness trend. Growth in both confectionery categories is set to be rather limited, with sales driven by products with a higher content of cocoa and less sugar and fats; Per capita consumption of chocolate and confectionery is rather low and concentrated during festive periods.

Competition: Colombia is a large producer of chocolate and confectionery. Mexico and the USA are large exporters of both chocolate and confectionery.

Distribution: Distribution is mostly through traditional grocery retailers, notably independent small grocers. However, sales through discounters are on the rise.

Challenges: EU exporters of certain chocolate products face relatively high tariff barriers, including tariff quota.

Opportunities: Products with a lower content of fats and sugar and with the addition of e.g. fruit or pure cocoa are set to drive the sales within the category.

5.7 Beer

5.7.1 SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ Colombians are heavy consumers of beer. ▪ EU countries account for a third of Colombian imports in terms of volume. ▪ Imports from the EU have recorded a growing trend. 	<ul style="list-style-type: none"> ▪ Consumers have a preference for local low-priced brands, with local brands quite regionalised in their popularity. ▪ Non-alcoholic beers are losing momentum and flavoured beers are not popular.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ Consumption amongst women is on the rise. ▪ The beer market is expected to perform well over the next years. ▪ Colombians have a general preference for light beers. ▪ There is an increasing premiumisation trend and interest in innovative products. 	<ul style="list-style-type: none"> • Mexico is a dominant exporter of beers into Colombia. • The market is dominated by large companies producing in Colombia. • Domestic craft production, which may address the same market as many imported beers, is small but rapidly growing.

5.7.2 Consumption

5.7.2.1 Evolution of consumption

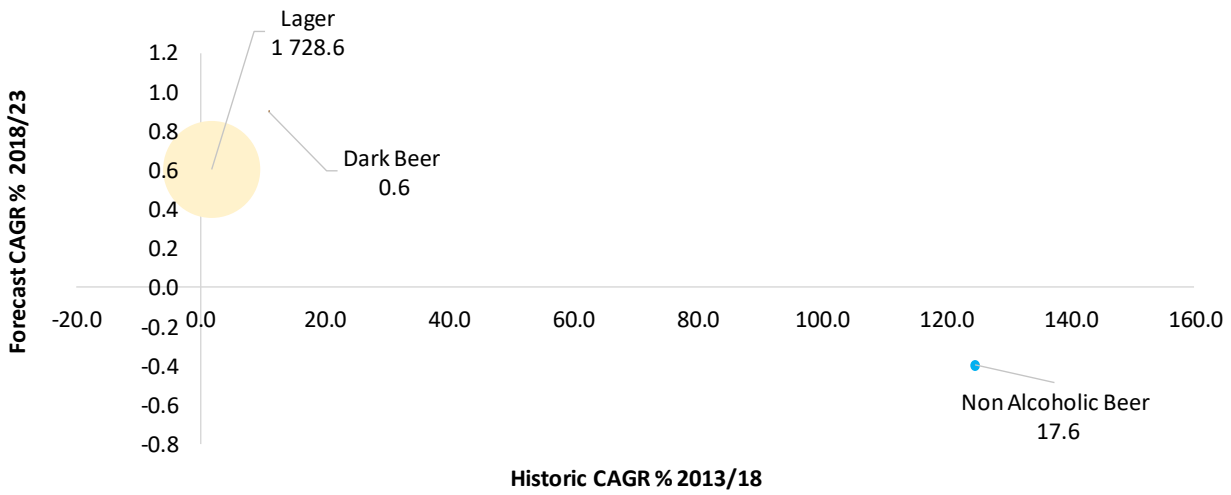
Beer is the most popular alcoholic drink in Colombia. In 2017, indeed, an average of 129 litres of alcohol per household was purchased from retailer outlets, of which the vast majority (124 litres) was beer. Subsequently, as indicated in Figure 5-30, total **consumption of beer in the Latin American country is massive**, reaching volumes of over 2.5 billion litres in 2018. Of these, 1.7 billion litres were lagers. At the same time, as consumers are more and more into responsible drinking, they have also developed a taste for non-alcoholic beers, as demonstrated by the yearly +124.7% growth posted in 2013-2018 by this category. Dark beer consumption was the lowest in 2018, amounting to 0.6 million litres. In general, benefitting from high taxes on other alcoholic drinks, **all beer segments performed well** in the past five years, recording an average 3.1% growth rate. Imported lager witnessed rapid growth, increasing by 24% in total volume sales in 2018, driven mainly by premium brands such as Corona Extra and Heineken. The growth of imported mid-priced lager can also be attributed to association with music festivals and sports such as Coors with baseball and Heineken with football.

Nonetheless, per capita consumption of lager beer sales has fluctuated over the last years, peaking to 35.2 and 34.9 litres in 2016 and 2018 respectively, down to about 31 litres in 2017 and 2019. On the contrary, per capita consumption of non-alcoholic beer has grown rapidly reaching 0.4 litres in 2018.⁸⁶⁸⁷

⁸⁶ Euromonitor International: Economies and Consumers, 2019

⁸⁷ Euromonitor International: Alcoholic Drinks, 2019

Figure 5-30: Evolution and forecast of beer market (000 litres) in Colombia, 2013-2023; total volume



Source: Euromonitor International: Alcoholic Drinks, 2019

5.7.2.2 Consumer profile and purchase criteria

Beer is Colombia's favourite alcoholic drink; the country is indeed the third largest consumers of beer in Latin America, only preceded by Mexico and Brazil. Industrial beer is the most popular, but craft beers consumption is on the rise. The non-alcoholic segment, on the other hand, is losing momentum. In general, Colombians are more into responsible drinking, with lesser need to switch entirely to non-alcohol beer when hanging out. Furthermore, the popularisation of taxi apps such as Uber, Cabify and Beat, or the services of on-call designated drivers offered by insurance companies, have reduced the need for consumer to stick to non-alcoholic beer, thereby hindering its growth. Another reason for the loss of momentum for non-alcoholic beer is that after brands like Beck's and Buckler were discontinued in 2018 due to lack of sales, the offer in the market is now limited to a few brands like Aguila Cero and Corrs Light. There is, nonetheless, groups of health-conscious consumers as well as responsible drinkers who still create some demand for non-alcoholic beer.

Consumers

Consumers of all ages and social classes drink beer in Colombia. Despite the dominance of domestic lager, many consumers have been changing their preference to imported beer.

Consumption slightly varies based on some other indicators, including:

- **Age:** People of all ages drink beer, in Colombia. However, imported beer is mostly purchased by young adults between the ages of 20 and 34.
- **Gender:** It is estimated that for every two liters of beer consumed by men, women consume a liter. Women have a preference for lighter beers, with a lower alcohol content and original tastes. Another important trend is that, in recent years, the consumption of craft beer amongst women has increased by 30%.

- **Area of residence:** On average, consumers in Bogotá, Cartagena and Medellín are the ones spending more in beer. Beer culture is indeed booming in these cities. More interestingly, imported products are distributed mainly in big cities. Regarding craft beer, the major markets in are Bogotá, Villavicencio and Cartagena. Moreover, there are some areas in Colombia which recorded among the highest per capita consumption of beer in the world. That is the case of a town in Boyacá, called Sáchica, where each consumer drinks 143 liters per year.⁸⁸⁸⁹⁹⁰
- **Income:** unlike lower-income consumers, that prefer cheap domestic brands, upper-middle and high-income groups are more likely to purchase imported brands. Premium and craft beers indeed appeal to these consumers. For instance, Club Colombia, a Bavaria brand, is consumed more by the middle and upper classes due to its higher price.

Drivers and method of consumption

Colombians have a **preference for blond beer**, which they usually consume with meals. The Colombian beer market is indeed dominated by a few dominant brands which usually propose rather light tastes.

Colombian consumers consider that beer has its unique taste and that it should not be mixed with other flavors in large quantities. The only exception to this is Aguila Fusion Lemon, a new product launched by Bavaria in September 2019. Bavaria also has Cola y Pola, a mixture of beer and coke, which is called “*refajo*” rather than beer. Colombians also mix beer with their local fizzy drinks like “Kola Roman” or “Colombiana”. However, as a general rule, beers mixed with e.g. fruit flavours are unlikely to be widely popular in Colombia.

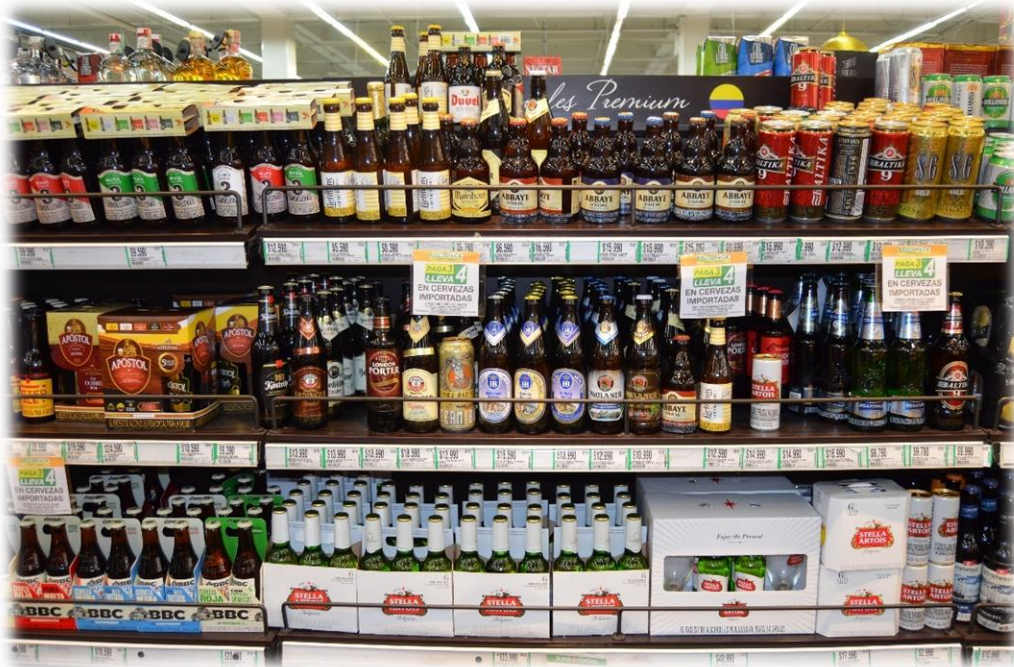
Middle-class consumers are progressively looking for innovative products and tastes; and this is helping drive demand for imported and craft beers. In Medellín, the following were, in order, identified as the most popular types of craft beer:

1. Red beer with fruity notes, full body and a palpable taste of hop;
2. Yellow beer with a refreshing and soft taste;
3. Black creamy beer with a little toasted taste;
4. Plain yellow lager.

⁸⁸ Un millón de pesos gasta un colombiano en promedio en cerveza al año, <https://www.portafolio.co/tendencias/un-millon-de-pesos-gasta-un-colombiano-en-promedio-en-cerveza-al-ano-519744>

⁸⁹ El mercado de la cerveza artesanal: Los dueños del 1%, https://revistadiners.com.co/gastronomia/67190_el-mercado-de-la-cerveza-artesanal-los-duenos-del-1/

⁹⁰ ¿Cuánta cerveza se toma en Colombia?, <https://www.eluniversal.com.co/colombia/cuanta-cerveza-se-toma-en-colombia-DJ795252>



Imported beers on a popular supermarket shelf in Colombia, showing the increasing range of products available as consumers look for innovative products and tastes. © Agra CEAS / Euromonitor International, 2019.

Connected to increased interest in innovative products and tastes is the **premiumisation trend**. For many years the presence of premium brands was concentrated on locally produced beer, small participation of imported brands and an atomised industry of artisanal beers. Nevertheless, the rising sophistication in Colombian consumers' tastes, the rapid expansion of the pub culture and the arrival of Central Cervecera de Colombia in 2015 have expanded the alternatives for consumers, who are more open to new experiences around beer, with tastings and pairings with different types of food gaining popularity. The premiumisation trend is also supported by a change in consumption habits, with Colombians moving from heavy drinking to more leisurely drinking. Thus, a change in culture, whereby alcoholic drinks are being consumed when relaxing with friends and family, has led to the increasing popularity of more upmarket offerings⁹¹⁹².

Regarding methods of consumption, beer is more commonly consumed in the following occasions:

- **Summers:** Hot weather periods lead to an increase in beer consumption. Even if Colombia does not have seasons due to its location in the tropics, coastal regions are usually hot and high-altitude places like Bogotá experience periods of high temperatures.

⁹¹ El mercado de la cerveza artesanal: Los dueños del 1%, <https://revistadiners.com.co/gastronomia/67190-el-mercado-de-la-cerveza-artesanal-los-duenos-del-1/>

⁹² Euromonitor International: Alcoholic Drinks, 2019

- **Social gatherings:** Most beer is consumed during social gatherings, which usually take place from Thursday to Saturday. 50% of the consumption takes place during these three days of the week. Companies such as Pernod Ricard, Diageo and more recently Central Cervecera de Colombia (Heineken) offer the organisation of parties at home or a private place for large groups; Beer is the most preferred drink for such parties.
- **Sports events and music festivals:** Sports events and screenings are occasions for beer companies to make big marketing campaigns, thereby increasing their sales. For instance, while Sol and Coors Light have a stronger presence on the Caribbean Coast and are associated with baseball, Heineken continued to gain ground thanks to its sponsorship of the UEFA Champions League, which is popular in the country due to the participation of Colombian football players in European teams. Also, music festivals contributed to its positive performance. Cultural events, like the music festival Estereo Picnic that is held in Bogotá every year in April, are also occasions when more beer is consumed.

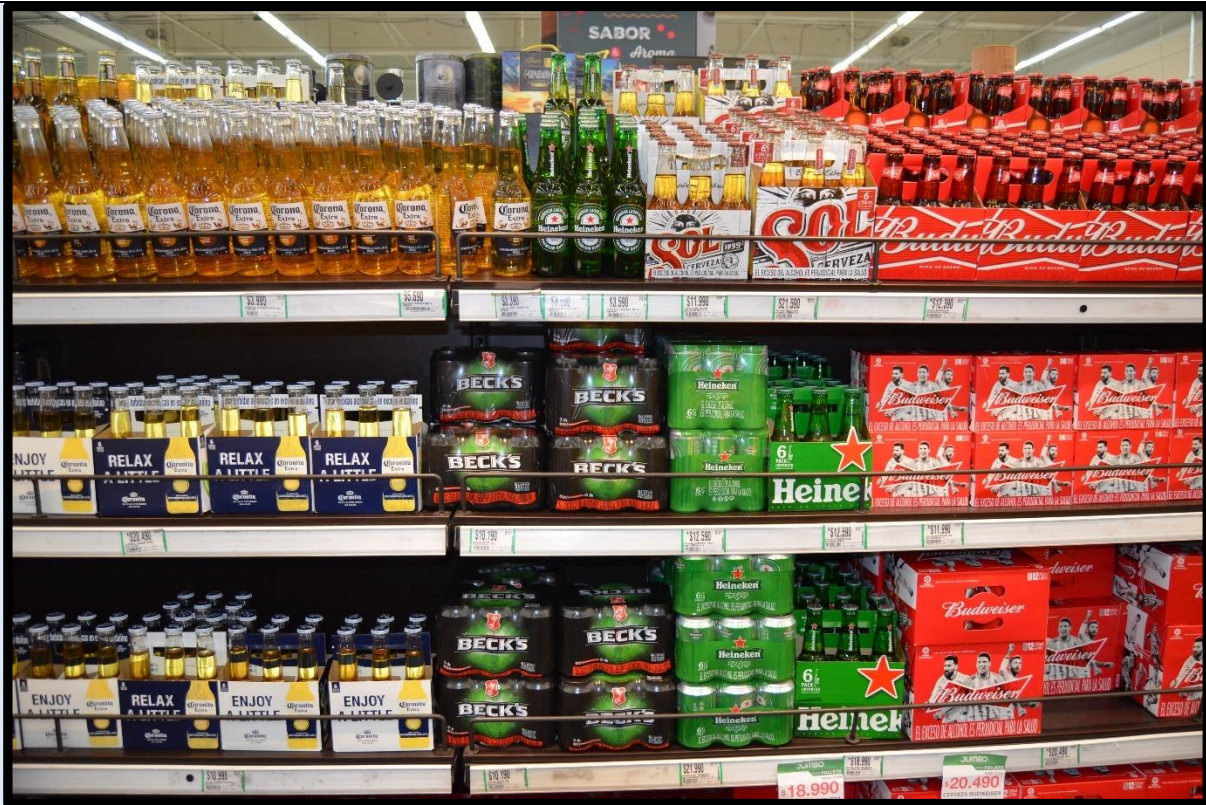
Purchase criteria

Colombian consumers are gradually demanding variety and original tastes. In particular, **upper-income adults (including young adults) give more importance to quality**. However, price remains a key purchase criterion amongst the majority of consumers, especially the price-sensitive middle and lower classes. The latter have a preference for domestically produced low-priced beers.⁹³ Nonetheless, competition within mid-priced beer is not based on price, because companies establish the same price for all brands. Instead, competition is more related to the regional presence of brands and the availability of different bottle sizes. The Barranquilla factory of Bavaria is said to be the home of the Aguila brand, which is, therefore, more popular among the consumers in the Caribbean coast. Pilsen is produced in the factory in Antioquia and is considered to be a regional brand of this department. Poker has more presence in Bogotá and the inner parts of the country. Furthermore, brand is also an important purchase criterion, as each age group in Colombia has a marked preference for a particular brand. Consumers usually go to the market or the pub already knowing which brand they want.

Beer on Colombian retailers' shelves...

Although domestic beer is predominant on Colombian shelves, European beer, especially well-known brands, can be easily found in both 330 ml bottles and 500 ml cans and bottles. Imported beers are often displayed together, separate from domestically produced beers.

⁹³ *Ibid.*



In very broad terms, two categories of imported beer can be found:

- Lager available and sold in larger volumes, with mid range pricing; effectively offering an alternative to domestically produced lager, albeit at a slightly higher price.
- More specialist/unique beers, displayed in smaller quantities and generally with the higher mid range to premium pricing. This broad category includes a wide range of beers, e.g. ales, dark beers, plisners, weizen/heffeweizen and premium lagers.

These two very broad categories of beer are often grouped together in retail outlets (see pictures above and below).



Certain retailers offer sales promotions on imported products, such as discounts.

Pictures: © Agra CEAS / Euromonitor International, 2019.

5.7.2.3 Recent market trends

Overall, **growth of sales within the beer category are projected to slow down between 2018 and 2023**. Over this period, total sales of beer are predicted to increase by a CAGR of 1%, reaching nearly 2.7 billion litres in 2023. Beer will continue to see a better performance in the premium segment, with young adults changing their habits to drinking less, but moving to high-quality beers. On the contrary, the growing trend in the non-alcoholic segment is projected to reverse slightly, with a contraction of the market foreseen.

Recent trends specific to imported beers are:

- discounters (such as D1) importing beer directly e.g. from Germany, and offering it to consumers at low prices (e.g. COP 2.00 for a 330ml can).
- larger imported beer brands associating themselves with sports and music festivals as a means of promotion.

5.7.3 Offer

5.7.3.1 Domestic production

Although Colombia is not amongst the world's largest producers of beer, the country has **considerable levels of production**. With over two billion litres, beer was indeed the top alcoholic beverage produced in Colombia, most of which was of a Pilsen type (see Table 5-4 below). The domestic company Bavaria is the largest beer producers in Latin America, and one of the most important manufacturers at a global level as well. The company accounted for 91% of the total volume share in 2018.

On top of industrial production, there is an emerging craft beer production with 8 million litres produced in Colombia in 2018. Even if still a fraction of the industrial production, this sector is growing at an annual rate of 46% and there are already more than 250 craft breweries in the country.

Table 5-4: Beer production volume and value, 2017

Product	Volume, 000 litres	Value, 000 EUR
Bottled beer (Pilsen)	2 108 663	1 418 276
Dark beer	121	98
Total beer	2 108 784	1 418 374

Source: Agra CEAS based on DANE figures.

5.7.3.2 Imports and exports

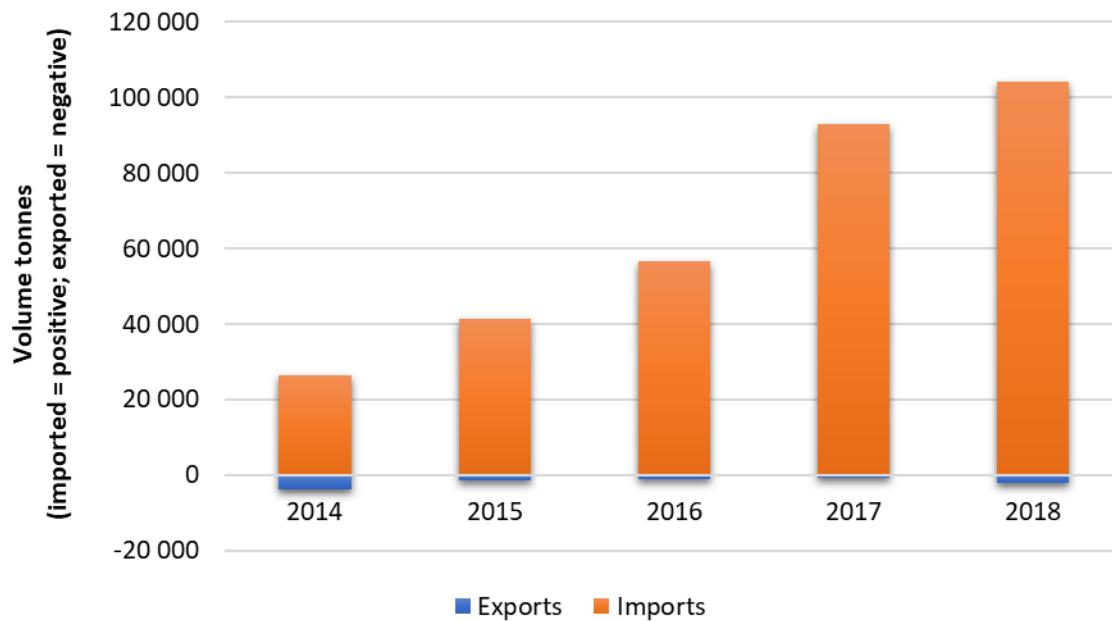
As indicated in Figure 5-31, Colombia is a net importer of beer. Imports have grown significantly, posting a four-fold increase between 2014 (26 601 tonnes) and 2018 (104 197 tonnes).

Figure 5-32 shows that **Mexico leads imports of beer to Colombia**, accounting for nearly 63% of all Colombian imports by volume (2018 figure); Netherlands follows (15% of total imports by volume). Germany and the USA are also large exporters, accounting for respectively 6% and 5% of total imports by

volume. The rest of the EU accounted for a further 10% of total imports by volume, most of which were shipped from Belgium, Spain and Denmark.

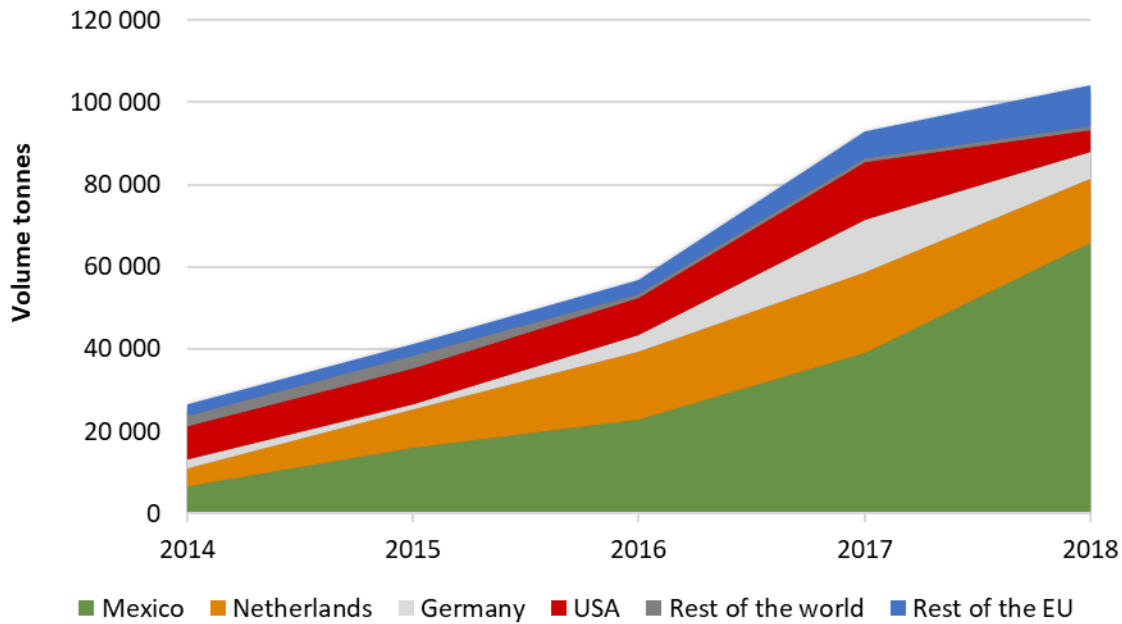
Mexico is the largest exporters of beer also in terms of overall value. As outlined in Figure 5-33, EU beers' unit value was below the average (809 EUR/tonne). Notably, both Dutch and German beers saw their unit value decreasing between 2017 and 2018. However, amongst the major EU exporters of beer to Colombia, Netherlands recorded the highest unit value, which is 748 EUR/tonne.

Figure 5-31: Trade balance (imports and exports) of beer in Colombia, 2014-18; tonnes



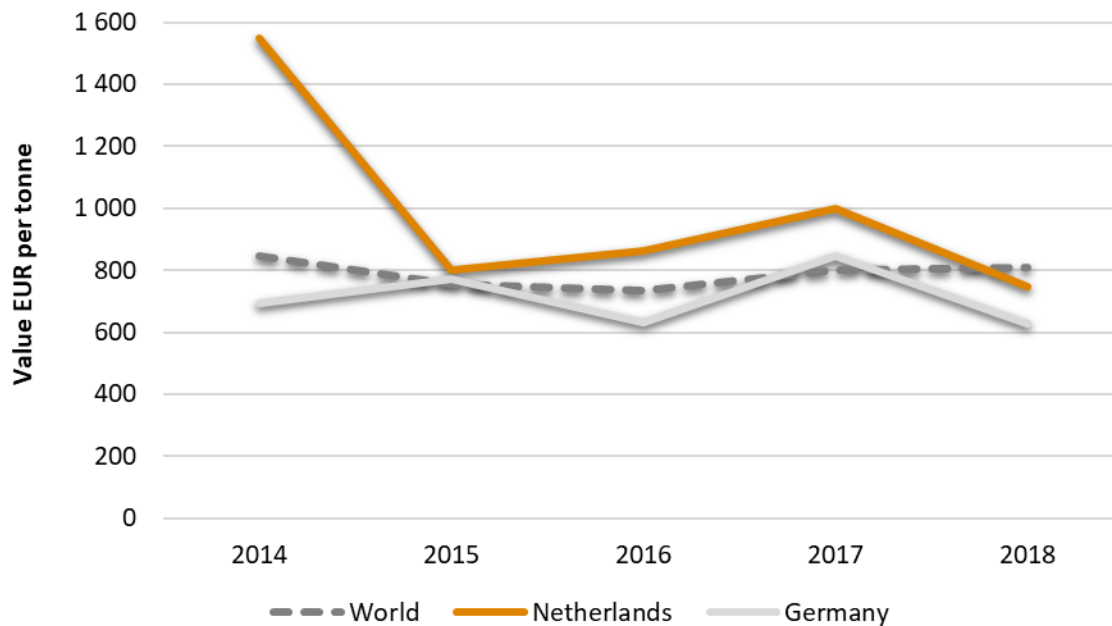
Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN code 2203.

Figure 5-32: Colombian imports of beer by country, 2014-18; tonnes



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
 Data for CN code 2203.

Figure 5-33: Per unit value of Colombian imports of beer for selected countries, 2014-18 (EUR per tonne)



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
 Data for CN code 2203.

5.7.3.3 EU GI products

As reported in section 9, under the modernised EU-Colombia and Peru Trade Agreement, **three beers are recognised as Geographical Indications in Colombia**, namely Czech *Českobudějovické pivo* as well as German *Bayerisches Bier* and *Münchener Bier*.

5.7.3.4 Main competitors

As outlined in section 5.7.2, Mexican exports account for a large share of beer exports to Colombia. On top of that, Mexican exports have been growing over the last years and are projected to continue to increase. However, imports of beer account for a small share of the market, which is dominated by local producers. The leading beer company based in Colombia is Bavaria, which is strongly focused on its premium portfolio of foreign brands, including Budweiser, which is locally produced.⁹⁴

5.7.4 Specific market entry requirements

Market Access and Entry

As reported in section 4.2.1, beer producers must submit the Import Registration form to the MINCOMEX and pay duties in order to ship their products to Colombia. Imported products must comply with Law 9/1979, as well as all further food and safety rules, as described in detail in section 4.2.2.

In terms of tariffs, **all European beers benefit from a duty-free access to the Colombian market**, under the EU-Andean Trade Agreement.

Detailed information on import duties and Rules of Origin can be consulted on the European Commission website:
<https://madb.europa.eu/madb/atDutyOverviewPubli.htm?countries=CO&hscod=2203>

Customs procedures

A list of standard documents required for import beer into Colombia is presented in section 4.2.1 (Table 4-1). Furthermore, as outlined in Table 4-2 in section 4.2.1, the following documents are requested to ship their products to Colombia:

- Sanitary Registration of Foodstuffs,
- Preliminary Import Registration,
- Authorisation of Foreign Foodstuffs Manufacturers,
- Certificate of Analysis.

In general, companies must be advised that **red tape remains a problematic market access issue in the beer sector**. There are also advertising restrictions on alcoholic beverages (see section 6.2).

⁹⁴ Euromonitor International: Alcoholic Drinks, 2019

Any other up to date information on appropriate documents concerning customs procedures can be consulted on European Commission website:

<https://madb.europa.eu/madb/datasetPreviewIpubli.htm?countries=CO&hscod=2203>

SPS measures

All sanitary and Phytosanitary measures concerning the import of beer into Colombia are in line with international standards.

Up to date information on appropriate documents concerning SPS measures:

<https://madb.europa.eu/madb/datasetPreviewIpubli.htm?countries=CO&hscod=2203>

Labelling

As described in more detail in section 4.2.3, beer products must comply with both generic labelling rules, as provided for in Resolutions 5109/2005 and 1506/2011, as well as with **specific labelling rules** concerning alcoholic beverages set out in **Decree 1686/2012**.

5.7.5 Distribution



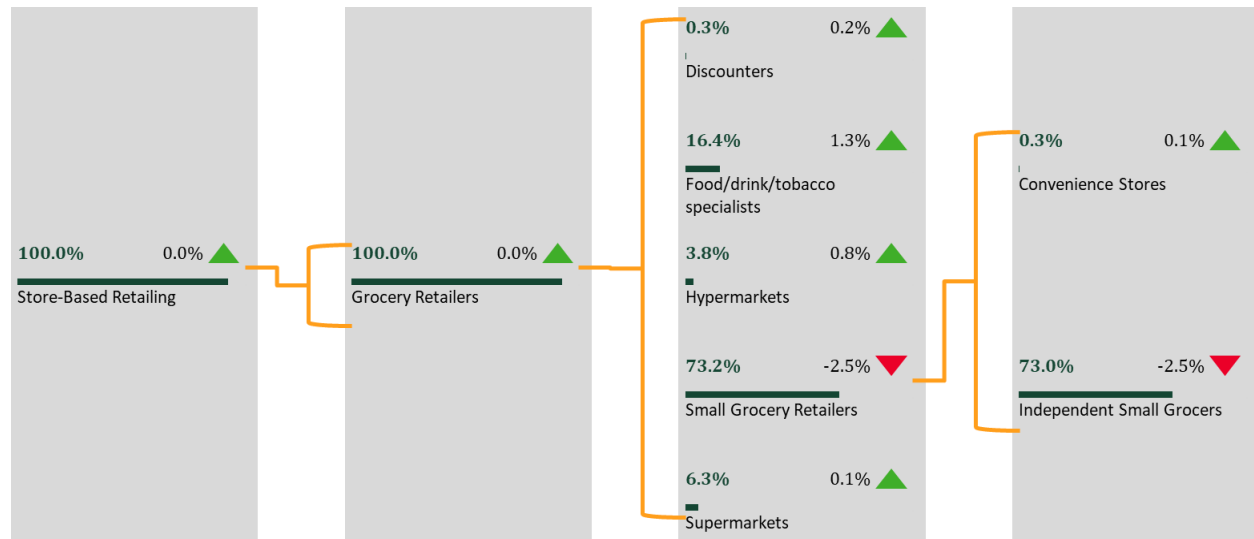
Local beers are often sold ready chilled; though some outlets are also selling imported lagers chilled. © Agra CEAS / Euromonitor International, 2019.

In Colombia, **off-trade channels account for about 73% of beer sales in terms of volume**. As outlined in Figure 5-34, among off-trade channels, beer is distributed through store-based retailing, notably through grocery retailers. Amongst these, small grocery retailers accounted for 73% of total sales, followed by food/ drink/ tobacco specialists (16%). Beer is available at most of the 350 000 independent small grocers all over the country, located in both urban and rural areas. Unlike other alcoholic beverages, supermarkets, hypermarkets and discounters played a minor role for the distribution of beer.

Despite the expansion of pubs, **craft beer has also seen rapid growth in the retail channel**, thanks to the increasing offer at modern retailers, and thanks to delivery apps such as Rappi, which make it easier for consumers to order a broad variety of

brands, which are not necessarily available in retail stores.⁹⁵

Figure 5-34: Distribution channel overview of beer in Colombia, off trade volume (2018)



Source: Euromonitor International: Alcoholic Drinks, 2019.

5.7.6 Challenges for EU products

Colombia is a large producer of beer, therefore imports account for a small share of total consumption. On top of that, Mexico accounts for most exports of beer to Colombia, by volume and value.

Market Takeaway: Beer

Consumption: Beer is Colombians' favourite alcoholic drink; therefore, total consumption of beer is relatively high. This trend is set to continue, as new taxation increased the price gap between beer and spirits/wine, to the benefit of beer producers.

Competition: Domestic production is massive; Mexican beers are very popular and widely available.

Distribution: Small grocery retailers are the most important channel (as well as the dominant one) for the distribution of beer, though craft/specialist beers are generally offered through modern retailers.

Challenges: EU imported beers face the competition of local and Mexican low-priced brands.

Opportunities: Women are increasingly purchasing beer, including craft beer. Young adults are increasingly interested in premium qualities, and there are consumers groups interested in innovative products.

⁹⁵ Euromonitor International: Alcoholic Drinks, 2019

5.8 Pet food

5.8.1 SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ Sales of pet food is set to record a double-digit growth over the next years. ▪ Most EU cat and dog food products have duty-free access to Colombia. 	<ul style="list-style-type: none"> ▪ Distribution of pet food is highly fragmented. ▪ Price remains a key purchase criterion, to the detriment of EU products, which are usually highly-priced. ▪ Wet food is considered too pricey. ▪ Discounters are increasingly offering low-priced pet food.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ Growing humanisation of cats and dogs creates new opportunities for EU exporters. ▪ As cats are growing in popularity, there are several opportunities for EU exporters wishing to enter the cat food market. ▪ Internet retailing is experiencing dynamic growth. 	<ul style="list-style-type: none"> • US, Brazil and Argentina account for nearly all exports of dog and cat food to Colombia. • Dynamic domestic production. • EU exporters face strict market entry requirements (e.g. several documents are requested to ship pet food in Colombia).

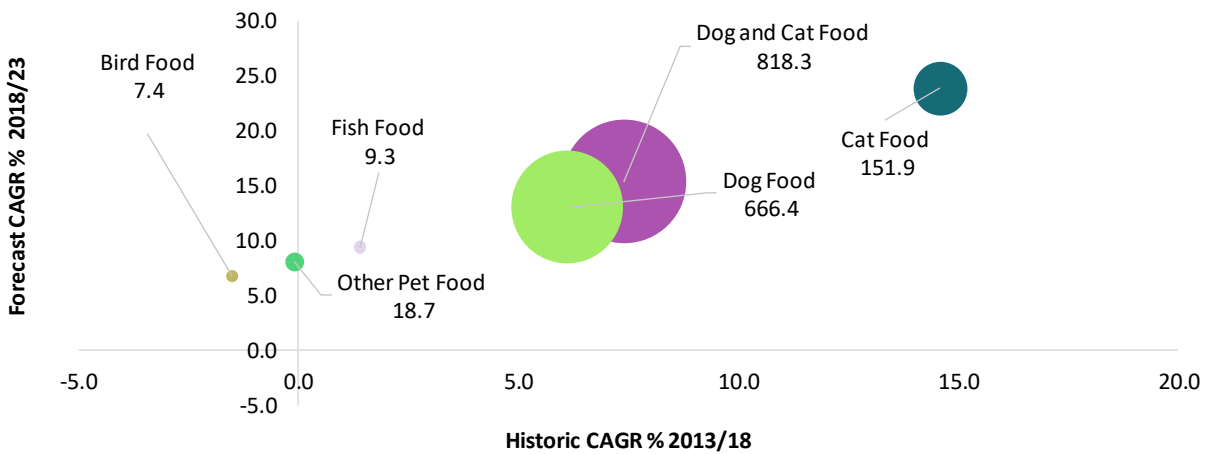
5.8.2 Consumption

5.8.2.1 Evolution of consumption

Led by dog and cat food, sales within the category of pet food boasted high figures in Colombia in 2018. Colombians indeed purchased nearly EUR 666 million of dog food, EUR 152 million of cat food, as well as about EUR 19 million of other types of pet food (mostly fish food). In 2019, volumes of dog and cat food sales grew by 4% and 6% respectively, to reach 389 000 and 81 308 tonnes respectively.

Dog and cat food recorded an annual growth rate of 7.4% in 2013-2018. Cat food recorded the highest rates, growing by 14.6% in the same period. On the contrary, sales of other pet food recorded a negative performance.

Figure 5-35: Evolution and forecast of pet food market in Colombia, 2013-2023; retail value (EUR million)



Source: Euromonitor International: Pet Care, 2019.

5.8.2.2 Consumer profile and purchase criteria

Consumers

As observed in section 5.8.2.1, **dog and cat food are dominant pet food segments**. The primary reason is that both animals are increasingly “humanised” and perceived as members of the family, hence boosting consumption of dog and cat food. Fish food remains the largest other category. Its relative significance in sales is also because fish require ad hoc prepared food. Colombia is rich in natural resources and biodiversity, with various species of birds and fish, as well as small mammals and reptiles. However, most of these species, with the exception of some fish, are usually not kept as pets.

Regarding dogs, over the last years, there has been a growing trend towards smaller breeds, which has affected volume sales of dog food and the types of dog food sold. This trend is likely to continue, driven by rising urbanisation in the country, with more people living in smaller apartments, making it more convenient to keep smaller dogs. On top of that, small breeds are typically less expensive to maintain as they eat less. Cats are less popular than dogs. However, there is a growing tendency to keep them as pets, as cats are easier to keep in smaller spaces and are also cheaper. Furthermore, as they do not need to be taken for a walk, they are considered less of a commitment than dogs.⁹⁶

Drivers and method of consumption

In urban areas, the use of prepared cat food and even Biologically Appropriate Raw Food (BARF) and organic diets is on the rise, largely due to recommendations by veterinary clinics, but also promotion campaigns by leading cat food brands.

⁹⁶ Euromonitor International: Pet Care, 2019.

Furthermore, companies are communicating the different characteristics and behaviours of cats and dogs and encouraging families to treat cats as valued family members, rather than simple pets. This **humanisation trend is the key driver for sales of cat food**.

Regarding dogs, veterinary clinics, pet specialists and dog food manufacturers are also increasingly promoting **dog food for specific conditions and needs**, such as digestive problems and allergies, with such products typically positioned in the premium and super premium segments.⁹⁷

Purchase criteria

While many Colombians seek a healthy diet for their pet, price remains a key purchase criterion. **Owners expect adequate quality food but at an affordable price**. This applies mainly to dog food; indeed, in 2018, this trend was observed even more, with many dog owners trading down when buying dog food, in part due to the rise of discounters in the country offering more affordable pet food. On the contrary, cats are usually perceived as fussy eaters, which can encourage brand loyalty, in the belief that their pet will enjoy just one particular brand of cat food.

5.8.2.3 Recent market trends

Overall, **sales within the pet food category are projected to grow at a double-digit rate in 2018-2023**, driven by this humanisation trend. Over this period, total sales of pet food are predicted to increase by 15.2% per year, reaching nearly EUR 837 million in 2023. Notably, cat food is expected to see dynamic growth, in excess of dog food, as cats will increasingly gain popularity amongst busy workers.⁹⁸

5.8.3 Offer

5.8.3.1 Domestic production

In Colombia, **sales of dog and cat food exceed the local production volumes**. This is particularly the case of cat food. As outlined in Table 5-5, in 2017, Colombia manufactured nearly 322 141 tonnes of dog food, as well as 49 890 tonnes of cat food. The total value of dog and cat food domestically produced amounted to over EUR 250 million.

Table 5-5: Pet food production volume and value, 2017

Product	Volume, tonnes	Value, 000 EUR
Dog food	322 141	204 111
Cat food	49 890	45 933

Source: Agra CEAS based on DANE figures.

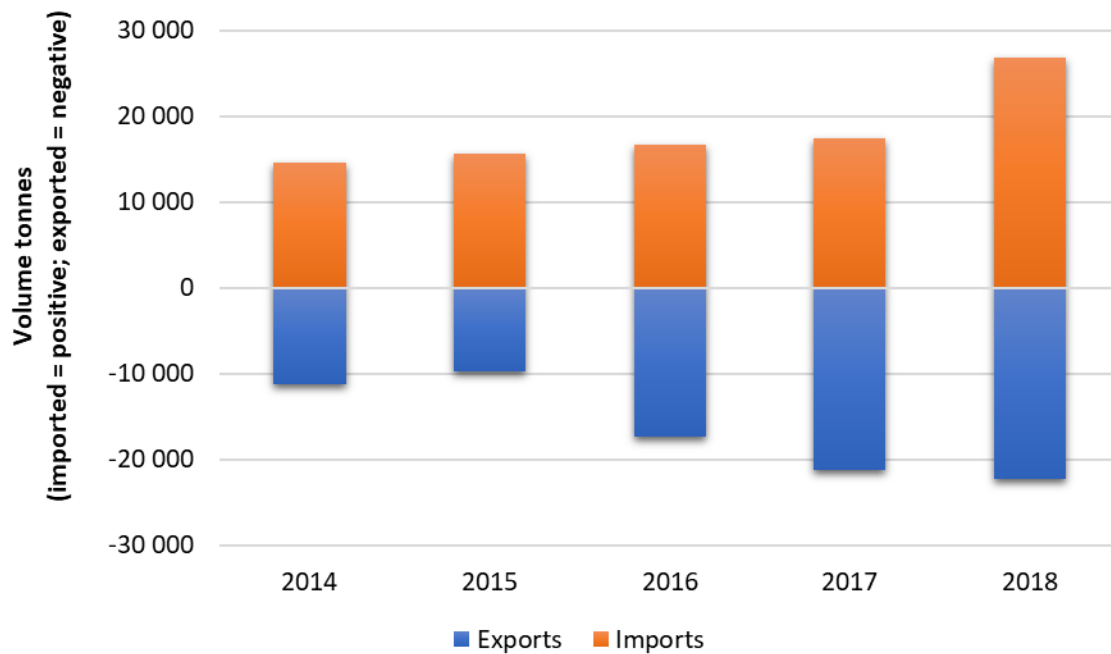
⁹⁷ *Ibid.*

⁹⁸ *Ibid.*

5.8.3.2 Imports and exports

As outlined in Figure 5-36, **Colombian imports of pet food are historically higher than exports**. However, exports have rapidly grown over the years, recording a 66% increase between 2014 and 2018. Similarly, imports have recorded a dramatic growth between 2017 and 2018, reaching 26 796 tonnes last year.

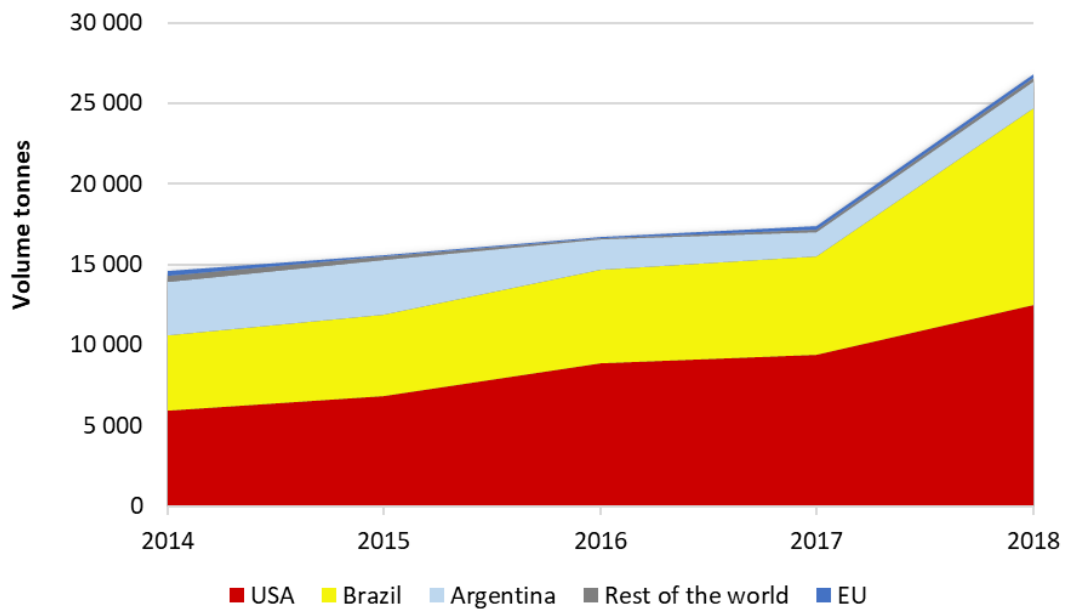
Figure 5-36: Trade balance (imports and exports) of dog and cat food in Colombia, 2014-18; tonnes



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN code 230910.

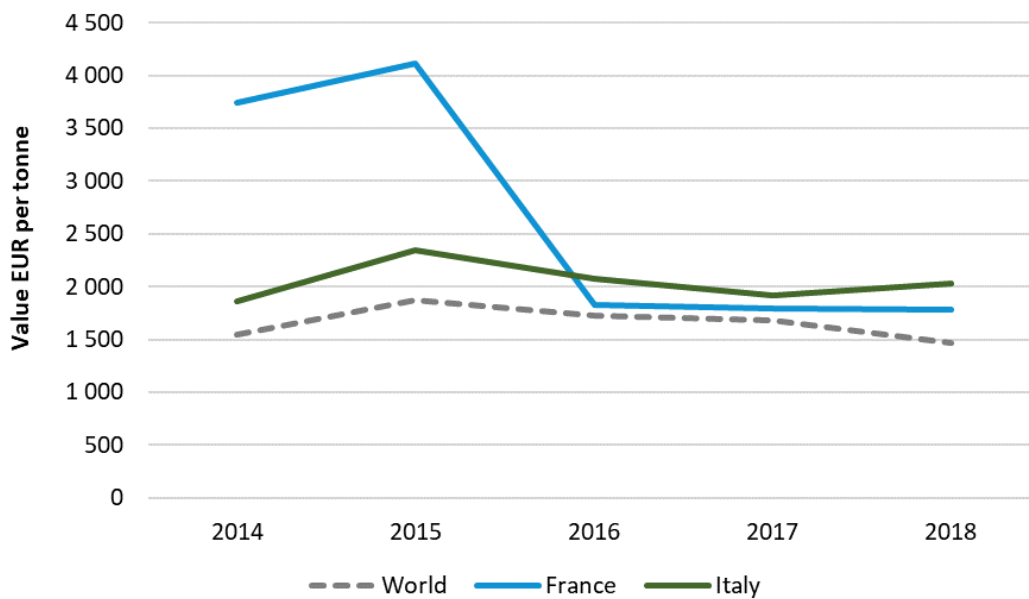
As outlined in Figure 5-37, **pet food is mostly supplied by the United States and Brazil** – each accounting for nearly 46% of total imported volumes, **followed by Argentina** (6.1%). European countries accounted for less than 1% of total Colombian imports, with France (67% of total EU exports), and Italy (22%) taking the lead. Still, it can be noted that the unit value of French and Italian pet food exported to Colombia in 2018 was above the world average of 1 470 EUR/tonne (Figure 5-38).

Figure 5-37: Colombian imports of dog and cat food by country, 2014-18; tonnes



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
 Data for CN code 230910.

Figure 5-38: Per unit value of Colombian imports of dog and cat food for selected countries, 2014-18 (EUR per tonne)



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
 Data for CN code 230910.

5.8.3.3 Main competitors

In Colombia, production of dog food and cat food is considerable, though insufficient to meet domestic demand. On top of that, as outlined in section 5.8.3.2, United States, Brazil and Argentina account for nearly all imports of pet food into the country.

In terms of company's market share, leading players Masterfoods and Nestlé have the highest value sales in dry cat food, typically the first choice for cat owners in Colombia. However, both Masterfoods and Nestlé are seeing their share in dry cat food eroded by dynamic competitors such as Contegral and Solla.

5.8.4 Specific market entry requirements

Market Access and Entry

As reported in section 4.2.1, pet food producers must submit the Import Registration form to the MINCOMEX and pay duties in order to ship their products to Colombia. Imported products must comply with Law 9/1979, as well as all with further food and safety rules, as described in detail in section 4.2.2.

In terms of tariffs, **dog and cat food products put up in airtight containers, with a water content of at least 60% (CN code 2309.10.20) benefit from a duty-free access to the Colombian market**, under the EU-Andean Trade Agreement. Other type of dog and cat food products face higher imports tariffs, fluctuating between 3.8% and 20%.

Detailed information on import duties and Rules of Origin can be consulted on the European Commission website:

<https://madb.europa.eu/madb/atDutyOverviewPubli.htm?countries=CO&hscod=230910>

Customs procedures

A list of standard documents required for import pet food into Colombia is presented in section 4.2.1 (Table 4-1). Furthermore, as outlined in Table 4-2 in section 4.2.1, several other documents are requested to ship pet food products to Colombia, including:

- Phytosanitary Import Permit,
- Zoosanitary Import Permit,
- Phytosanitary Certificate.

Any other up to date information on appropriate documents concerning customs procedures can be consulted on European Commission website:

<https://madb.europa.eu/madb/datasetPreviewIFpubli.htm?countries=CO&hscod=230910>

SPS measures

All sanitary and Phytosanitary measures concerning the import of pet food into Colombia are in line with international standards.

Up to date information on appropriate documents concerning SPS measures:

<https://madb.europa.eu/madb/datasetPreviewIFpubli.htm?countries=CO&hscod=230910>

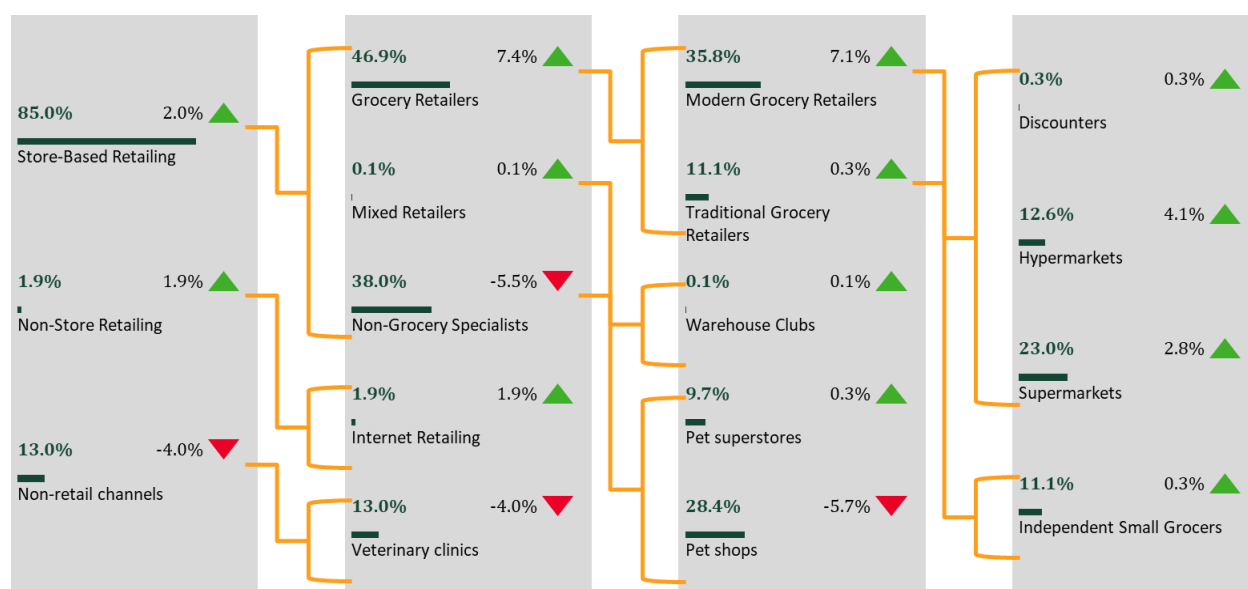
Labelling

In Colombia, pet food is not subject to specific labelling rules.

5.8.5 Distribution

As showed in Figure 5-39, distribution of pet food is highly fragmented in Colombia. However, it can be observed that **store-based retailing is the leading distribution channel**, accounting for 85% of total sales. Most notably, grocery retailers accounted for 49.6% of all sales, 35.6% of which were done through modern grocery retailers in 2018. Non-grocery specialists (38%) were the second most important store-based retailer, with pet shops taking the lead. The remaining sales took place through veterinary clinics (13%) and internet (1.9%). While **internet retailing** remains a small channel for dog food, it is **experiencing dynamic growth**, in accordance with an increasingly digitally-connected population. In addition to the convenience of home delivery, especially for heavy bags of dry dog food, the internet offers a wider variety of choice. Notably, several consumers use services such as Rappi, which bring meals or groceries directly to the home, including dog food.⁹⁹

Figure 5-39: Distribution channel overview of pet food in Colombia (2018); retail value



Source: Euromonitor International: Pet Care, 2019

5.8.6 Challenges for EU products

EU exporters that wish to penetrate the Colombian pet food market face the competition of strong domestic players, as well as exporters based in the United States, Brazil and Argentina. On top of that, EU producers may face lengthy market entry procedures, as several documents may be requested, including

⁹⁹ Euromonitor International: Pet Care, 2019.

Phytosanitary and Zoosanitary certificates. This can in turn slow down the whole export process and make it burdensome.

Market Takeaway: Pet food

Consumption: Sales are on the rise; they are projected to record a double-digit growth over the next years.

Competition: EU pet food products account for a very minor share of total imports; domestic production of pet food is massive compared to demand.

Distribution: Distribution is rather fragmented; most sales of pet food take place through modern grocery retailers and pet shops. Modern grocery retailers recorded a positive performance in 2018; Internet retailing is set to grow in importance.

Challenges: Market access can be complex and burdensome.

Opportunities: Cats are growing in popularity and so is cat food; in general, the humanisation trend is positively affecting sales of dog and cat food. Dog food for specific conditions has been promoted of late.

5.9 Processed fruit and vegetables

5.9.1 SWOT analysis

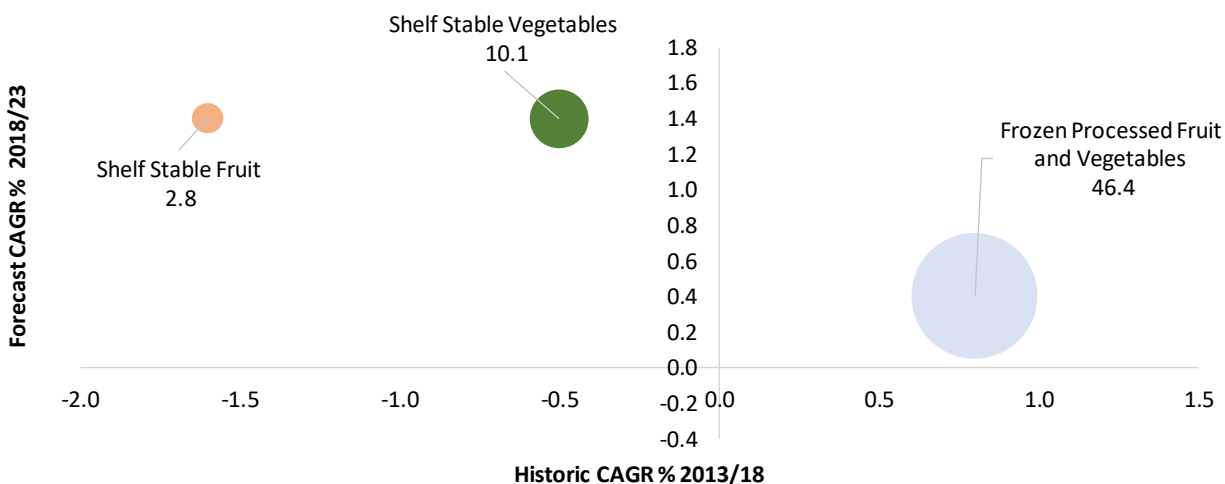
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ Demand for processed fruit and vegetable due to convenience added value. 	<ul style="list-style-type: none"> ▪ Dominance of domestic players on the market.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ Consumption is expected to pick up over next years. 	<ul style="list-style-type: none"> • Relative poor knowledge among consumers on European processed fruit and vegetables.

5.9.2 Consumption

5.9.2.1 Evolution of consumption

Consumption of processed fruit and vegetables has continued to decline in 2018, however it is projected to note a steady growth in the next years. Frozen processed fruit and vegetables constitute by far the largest segment, which grew steadily in last years and is expected to continue to do so over the forecast period. Both shelf stable vegetables and shelf stable fruit, after noting a negative CAGR in years 2013-2018 are projected to increase their market sizes by 1.4% per year in the next years (Figure 5-40).

Figure 5-40: Evolution and forecast of processed fruit and vegetable market (000 tonnes) in Colombia, 2013-2023; total volume



Source: Euromonitor International: Packaged Food, 2019.

5.9.2.2 Consumer profile and purchase criteria

Consumers

Colombian consumers have a strong preference for fresh fruit and vegetables and despite the convenience offered by processed products, fresh ones are consumed much more widely. Many domestic supermarkets picked up this trend, offering wide variety of freshly cut fruit and vegetables. Moreover, in

the light of the economic decline, even more consumers have been choosing fresh products, due to lower price.

Drivers and method of consumption

The key factor, driving the consumption of processed fruit and vegetables in Colombia has to do with traditional culinary habits. As Colombians tend to use fresh products, their use of processed fruit and vegetables remain rather limited and include several type of products, such as frozen potatoes and shelf stable beans among others.

Purchase criteria

Colombians base their purchasing approach mainly on price as well as convenience added value of the product. Consumers tend to add processed fruit and vegetables to other dishes/snacks. In effect, some products are chosen less often due to high sugar content, as they cannot be successfully added to a number of dishes/snacks.

5.9.2.3 Recent market trends

The market of processed fruit and vegetables is expected to increase across all segments. Shelf stable beans have been popular, especially in the Western parts of Colombia. Consumers tend to use them mostly due to convenience added value, as beans in general require some time for preparation¹⁰⁰. Shelf stable fruits, on the other hand, have been widely used as an addition for other sweet preparation, such as desserts (e.g. cherries).

5.9.3 Offer

5.9.3.1 Domestic production

Domestic production comprises of several leading multinational companies, e.g. Congelagro McCain Colombia, which dominates the segment of frozen process vegetables (potatoes). Moreover, private labels have registered considerable growth in sales of processed fruit and vegetables, which might be connected to increased activity of discounters, such as Ara, D1 and Justo y Bueno among others.

5.9.3.2 Imports and exports

Identifying data on trade in processed fruit and vegetables is extremely complicated due to the number of different lines under which such products can be imported. Trade in processed fruit and vegetables was captured in the data presented in section 5.1.2.25.1.2.2 on trade in fruit and vegetables as a whole.

5.9.3.3 EU GI products

As reported in section 9, under the EU-Colombia and Peru Trade Agreement, several products are set recognised as Geographical Indications in Colombia, including one processed fruit product:

- France:

- Pruneaux d'Agen / Pruneaux d'Agen mi-cuits (dried plum)

5.9.3.4 Main competitors

As identified in section 5.9.3.1, domestic producers dominate the small market of processed fruit and vegetables. Colombian manufacturers built strong consumer base, as they have been able to adjust their offer to consumer needs by launching products in line with a number of innovations. Additionally, some private labels have been encouraging consumers by deliberate placement of products next to leading brands, driving consumers to compare prices. That said, there are over 30 Colombian fruit and vegetable processing companies, mostly concentrated in the departments of Magdalena, Valle del Cauca, Antioquia, Cundinamarca and Atlántico. Some of the biggest ones include: Conservas California S.A., Panamericana de Alimentos S.A.S., Productos Alimenticios Bary S.A. among others.

5.9.4 Specific market entry requirements

Market Access and Entry

As described in section 4.2.1, European producers should register their products with the INVIMA and MINICOMEX¹⁰¹. Furthermore, products must comply with the Law 9 of 1979 on imports of food products, (see section 4.2.2). In addition, producers should be aware of other documentation applicable, when entering the Colombian fruit and vegetables market (detailed Table 4-2), such as:

Detailed information on import duties and Rules of Origin can be consulted on the European Commission website:
https://madb.europa.eu/madb/datasetPreviewFormATpubli.htm?datacat_id=AT&from=publi

Customs procedures

A list of standard documents required for imported products in Colombia is presented in section 4.2.1

Any other up to date information on appropriate documents concerning customs procedures can be consulted on European Commission website:
https://madb.europa.eu/madb/datasetPreviewFormATpubli.htm?datacat_id=AT&from=publi

SPS measures

All sanitary and Phytosanitary measures concerning the import of are in line with international standards. It should be pointed out though that additional documentation might be required (as per Table 4-2).

Up to date information on appropriate documents concerning SPS measures:
https://madb.europa.eu/madb/datasetPreviewFormATpubli.htm?datacat_id=AT&from=publi

¹⁰¹ In accordance with Decree 3075/1977, the following products are not subject to registration: (a) non-transformed chilled and frozen animal-origin food products, (b) non-transformed natural food products, and (c) raw materials for food preparation.

Labelling

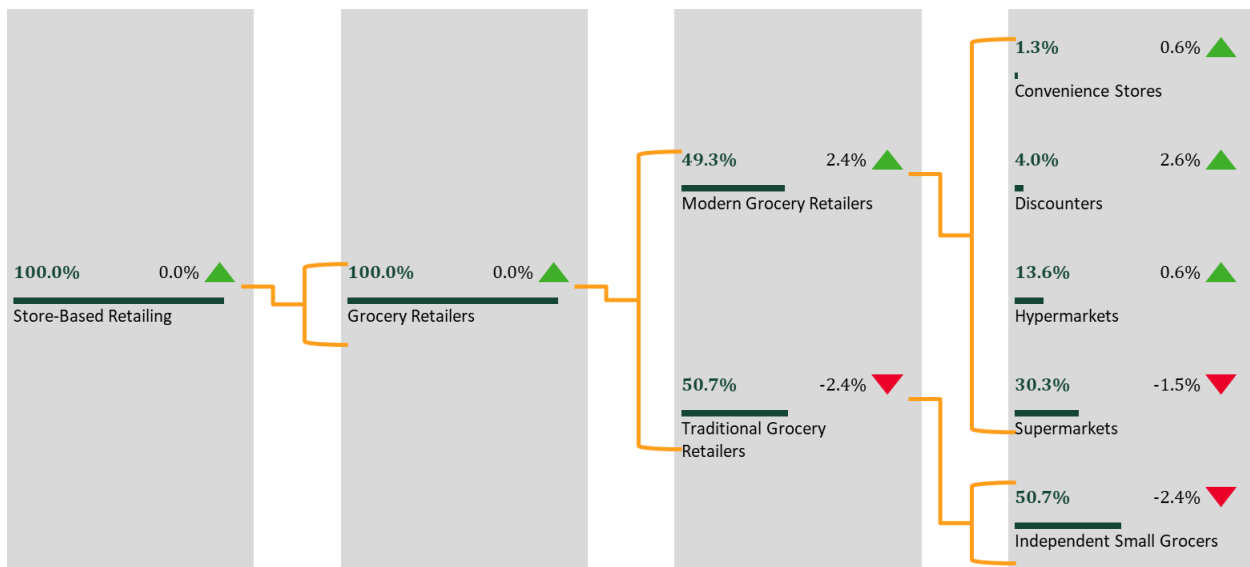
As described in more detail in section 4.2.3, all imported processed fruit and vegetables must be labelled in line with:

- Regulation in terms of labels or labels requirements (Resolution 5109 of 2005).
- Requirements for labelling or labels regarding additives (Resolution 1506 of 2011).

5.9.5 Distribution

As depicted in Figure 5-31, store-based retailing is the only distribution channel through which processed fruit and vegetables are distributed. In fact, these products are distributed in almost equal shares, in terms of retail value (2019), between modern grocery retailers (supermarkets, hypermarkets) and traditional grocery retailers (small grocers).

Figure 5-41: Distribution channel overview of processed fruit and vegetables in Colombia (2019); retail value



Source: Euromonitor International: Packaged Food, 2019.

5.9.6 Challenges for EU products

The main challenge European producers should take into account is the fact that the market, which is small to start with, generally relies on domestic production. Secondly, one should take into consideration that European processed fruit and vegetables are not widely known to Colombian consumers. Finally, Colombia imposes anti-dumping tariffs of 8% on frozen French fries imported from Belgium, Germany and the Netherlands.

Market Takeaway: Processed fruit and vegetables

Consumption: Consumption is projected to note a steady growth over the forecast period. Frozen processed products constitute the largest segment.

Competition: Market relies on domestic production, which accurately respond to newest consumer needs

Distribution: Products distributed equally through traditional (small grocers) and modern retailers (supermarkets, hypermarkets)

Challenges: Dominance of domestic brands, relative lack of knowledge of European products.

Opportunities: Growing consumption and interest in processed fruit and vegetables.

5.10 Prepared baby food

5.10.1 SWOT analysis

STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ As parents are unwilling to take risks over baby food, quality remains a key purchase criterion. ▪ Imports have recorded a large increase. 	<ul style="list-style-type: none"> ▪ The baby food market is rather small. ▪ Colombians' purchases are influenced by price considerations.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ With the breastfeeding rate falling, milk formula opens new market opportunities. ▪ Workers are increasingly interested in convenient baby food products. ▪ A healthy trend can be observed, with families willing to purchase more natural products. 	<ul style="list-style-type: none"> • Domestic brands offering mid-prices products are popular amongst Colombians. • Mexican imports of baby food are dominant. • Exports can be lengthy and burdensome, due to the large number of documents requested to access the baby food market.

5.10.2 Consumption

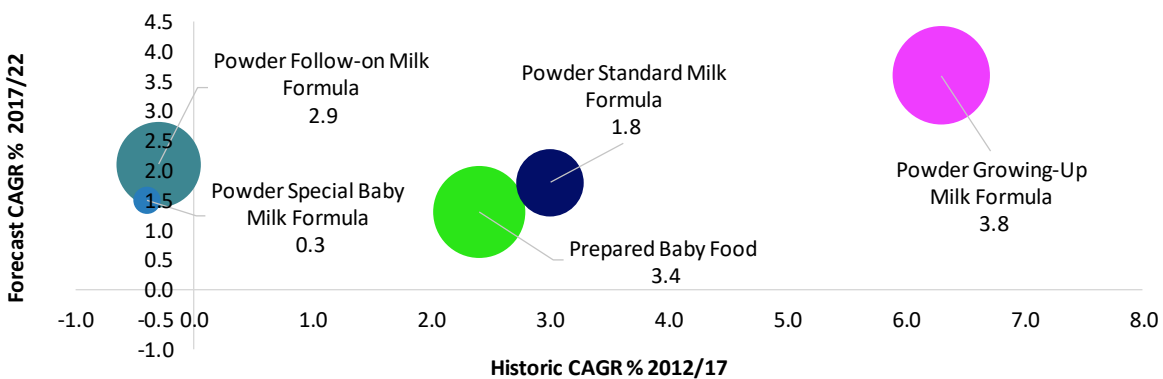
5.10.2.1 Evolution of consumption

Sales of baby food in Colombia have tendentially increased in 2013-2018, with some differences between sub-categories. Most notably, as indicated in Figure 5-42, the baby food category recorded a positive growth for the period 2013-2018. Powder follow-on milk formula and powder special baby milk formula are the only categories that posted negative growth.

In total, sales of baby food were rather limited in 2018, amounting to 12 200 tonnes. Powder growing-up milk formula and prepared baby food accounted for over half total sales in the category, followed by powder follow-on milk formula (24%), powder standard milk formula (15%), and powder special baby (2%).¹⁰²

¹⁰² The category includes pureed food, yoghurts, chilled desserts, soup, desserts, ice cream marketed for babies.

Figure 5-42: Evolution and forecast of prepared baby food (000 tonnes) in Colombia, 2013-2023; total volume



Source: Euromonitor International: Packaged Food, 2019.

5.10.2.2 Consumer profile and purchase criteria

Consumers

In line with WHO's recommendations, Colombian authorities and parent associations promote exclusive breastfeeding, at least for the first six months of a baby's life. However, **due to health, work or personal reasons, the breastfeeding rate is falling in Colombia**, despite the increasing measures to aid breastfeeding mothers, including extended maternity leave (in accordance with Law 1882, in force since 2017), breast milk banks and better options to extract and preserve breast milk. Therefore, a growing number of women rely on milk formula to feed their babies.¹⁰³¹⁰⁴

Drivers and method of consumption

Convenience drives sales of milk formula that mimics breast milk. These products feature added ingredients like HMO (human milk oligosaccharides - prebiotics present in breast milk) and DHA (Docosahexaenoic acid - omega-3 fatty acid, a primary component of the human brain that is naturally present in breast milk). Such ingredients nourish babies and children and are intended to make milk formula gentler on the digestive system, just like natural breast milk. In particular, manufacturers are promoting their standard and follow-on milk formula as a complement to breast milk, while targeting older children with growing-up milk formula, as well as prepared and dried baby food.

Although purées is not very popular, given that parents prepare purées at home or simply mash fresh fruits, sales are projected to boom, driven by convenience considerations. Indeed, as adults have increasingly on-the-go lifestyles, popularity of quick- and easy-to-prepare food is on the rise.¹⁰⁵

¹⁰³ New Rules for Maternity Leave in Colombia, <https://www.latamlawblog.com/2017/01/new-rules-for-maternity-leave-in-colombia-nuevas-reglas-para-la-licencia-de-maternidad-en-colombia/>

¹⁰⁴ Euromonitor International: Packaged Food, 2019.

¹⁰⁵ *Ibid.*

Purchase criteria

For Colombians, quality and price are two key purchase criteria when choosing amongst different brands of baby food. Parents are unwilling to take risks over baby food; in this regard, EU baby food products benefit from the reputation of high-quality and safe products. Nonetheless, price remains a key purchase criterion. Indeed companies have been reducing prices, not only for growing-up milk formula, which is the only type that can be advertised or offered at discounted prices at the point of sale, but also standard and follow-on milk formula.¹⁰⁶ However, another important trend can be observed in the baby food category: families are increasingly interested in natural products, without added sugar.

5.10.2.3 Recent market trends

Sales of baby food are projected to rise over the next few years, with all segments posting a positive performance. Driven by convenience and health considerations, baby formula and natural products are set to continue their recent rapid growth.

5.10.3 Offer

5.10.3.1 Domestic production

As underlined in section 5.10.2.1, in Colombia, the **baby food market is rather limited**. Therefore, domestic production is not great. Alpina Productos Alimenticios is the main provider of baby food and milk formula, in Colombia. Alpina's milk formula is positioned in the mid-priced segment, which makes this brand popular even amongst lower-income families.¹⁰⁷

5.10.3.2 Imports and exports

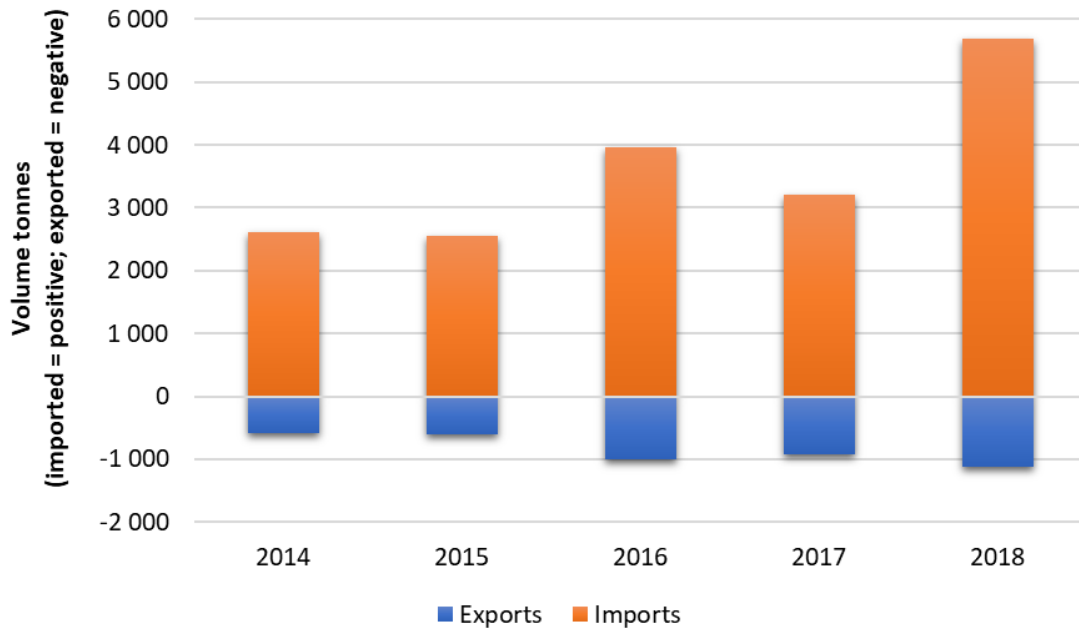
Colombia is a net importer of baby food, as set out in Figure 5-43 and Figure 5-44. Imports of homogenised and other food preparations for infant use dropped in 2017 and then went up in 2018. Last year, Colombia imported 5 687 tonnes of homogenised (over double the 2014 volume), as well as other 12 726 other preparations intended for infant use (up to 7 722 tonnes in 2014).

In 2018, **Mexico was the leading importer of baby food**. Not only nearly all imports of homogenised were shipped from Mexico, also nearly half other preparations for infants were provided by the central American country. Chile and Switzerland also accounted for large shares of shipments to Colombia. Amongst the EU country, Ireland and Spain stood out, each exporting 6% of total food preparations for infants shipped to Colombia.

¹⁰⁶ *Ibid.*

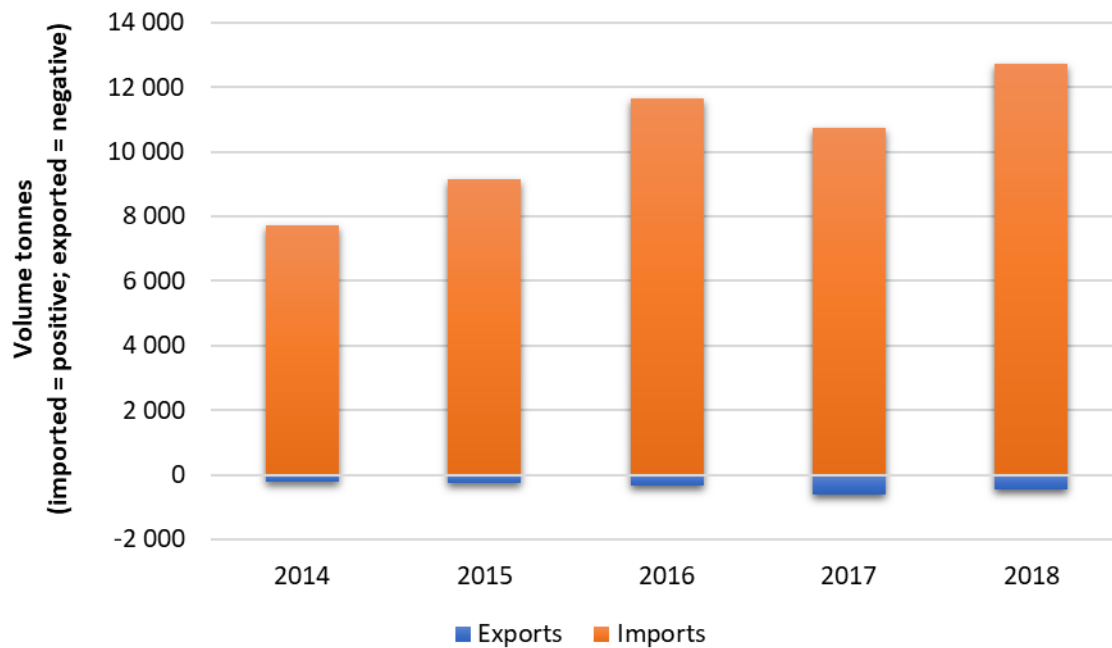
¹⁰⁷ Euromonitor International: Packaged Food, 2019.

Figure 5-43: Trade balance (imports and exports) of prepared baby food (homogenised preparations of jams, jellies etc.) in Colombia, 2014-18; tonnes



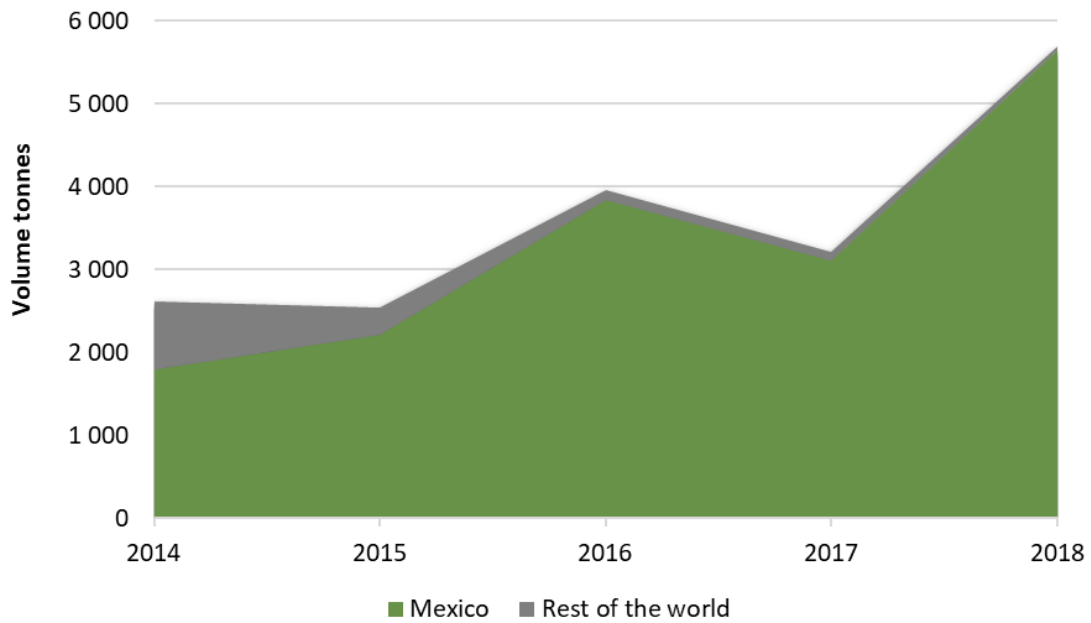
Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN code 200710.

Figure 5-44: Trade balance (imports and exports) of prepared baby food (food preparations for infant use) in Colombia, 2014-18; tonnes



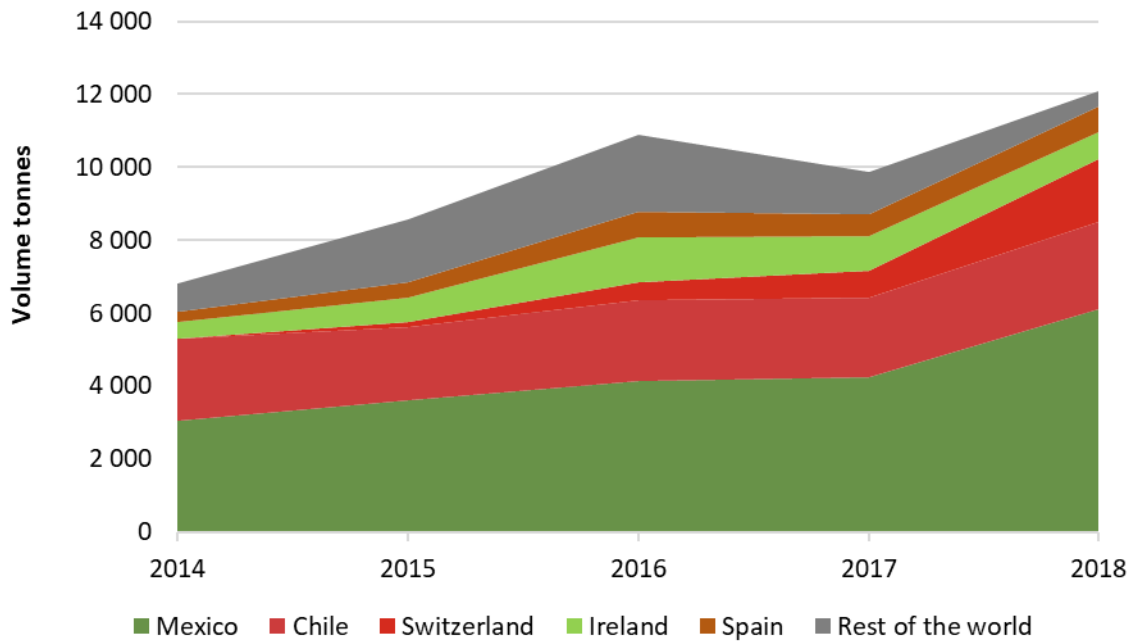
Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN code 190110.

Figure 5-45: Colombian imports of prepared baby food (homogenised preparations of jams, jellies etc.) by country, 2014-18; tonnes



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
 Data for CN code 200710.

Figure 5-46: Colombian imports of prepared baby food (food preparations for infant use) by country, 2014-18; tonnes



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
 Data for CN code 190110.

5.10.3.3 Main competitors

As outlined in section 5.10.3.1, domestic brand Alpina Productos Alimenticios is very popular amongst different segments of the population. On top of that, Mexican shipments dominate the imports in the baby food category. EU companies that wish to export baby food to Colombia also face the competition of Chile and Switzerland in the category of food preparation for babies (see section 5.10.3.2).

5.10.4 Specific market entry requirements

Market Access and Entry

As reported in section 4.2.1, baby food producers must submit the Import Registration form to the MINCOMEX and pay duties in order to ship their products to Colombia. Imported products must comply with Law 9/1979, as well as all with further food and safety rules, as described in detail in section 4.2.2.

In terms of tariffs, **EU homogenised products benefits from a duty-free access to the Colombian market**, under the EU-Andean Trade Agreement. On the contrary, a 11.3% duty applies to milk formulas (CN codes 1901.10.10, 1901.10.91, and 1901.10.99), above the tariff quota of 1 760 tonnes.

Detailed information on import duties and Rules of Origin can be consulted on the European Commission website:

<https://madb.europa.eu/madb/atDutyOverviewPubli.htm?countries=CO&hscod=190110>

<https://madb.europa.eu/madb/atDutyOverviewPubli.htm?countries=CO&hscod=200710>

Customs procedures

A list of standard documents required for import baby food into Colombia is presented in section 4.2.1 (Table 4-1). Furthermore, as outlined in Table 4-2 in section 4.2.1, the following documents are requested to ship certain baby food products to Colombia:

- Sanitary Registration of Foodstuffs,
- Preliminary Import Registration,
- Zoosanitary Import Permit,
- Authorisation of Foreign Foodstuffs Manufacturers,
- Certificate of Analysis,
- Veterinary Health Certificate for Animal Products.

Any other up to date information on appropriate documents concerning customs procedures can be consulted on European Commission website:

<https://madb.europa.eu/madb/datasetPreviewIFpubli.htm?countries=CO&hscod=190110>

<https://madb.europa.eu/madb/datasetPreviewIFpubli.htm?countries=CO&hscod=200710>

SPS measures

All sanitary and Phytosanitary measures concerning the import of baby food into Colombia are in line with international standards.

Up to date information on appropriate documents concerning SPS measures:

<https://madb.europa.eu/madb/datasetPreviewIfpubli.htm?countries=CO&hscod=190110>

<https://madb.europa.eu/madb/datasetPreviewIfpubli.htm?countries=CO&hscod=200710>

Labelling

As described in more detail in section 4.2.3, baby food must comply with generic labelling rules, as provided for in Resolutions 5109/2005 and 1506/2011. It should also be stressed that in accordance with **Resolution 333/2001 on nutrition and health claims** (see also section 4.2.3), food for children over six months and under four years of age are allowed to **make nutrition claims related only to vitamins, minerals and proteins**. In these cases, the food must be “high in” or “good source of” the nutrient object of the declaration. There are also restrictions on the promotion of infant formula (see section 6.2).

5.10.5 Distribution

Grocery retailers were the main distribution channel for baby food, in 2018, accounting for 59% of total sales within the category. However, non-grocery specialists, namely health and beauty specialists, which accounted for nearly 35% of total sales of baby food, are gaining ground, to the detriment of hypermarkets and supermarkets.

Figure 5-47: Distribution channel overview of baby food in Colombia (2018); retail value



Source: Euromonitor International: Packaged Food, 2019.

5.10.6 Challenges for EU products

European exporters face the competition from a few well-established domestic producers and imported Mexican brands. What is more, market entry access of baby food products can be challenging, as authorities request the production of several documents. This in turn may contribute to make the export process lengthy and burdensome. Furthermore, tariff quotas apply to some baby food products.

Market Takeaway: Prepared baby food

Consumption: Sales are limited, but consumption is dynamic and growing, as parents have increasingly hectic lives.

Competition: Mid-price brands are popular amongst Colombians; Mexican imports are dominant.

Distribution: Most baby food is distributed through modern grocery retailers (especially hypermarkets), as well as health and beauty specialists.

Challenges: Market access can be lengthy and burdensome due to strict entry requirements; some EU products also face tariff quotas.

Opportunities: As breastfeeding rates are dropping; milk formula products are growing in importance. A healthy trend can be observed, with an increasing number of families looking for more natural or sugar-free products. EU products can benefit from their good reputation in terms of safety.

5.11 Pasta

5.11.1 SWOT analysis

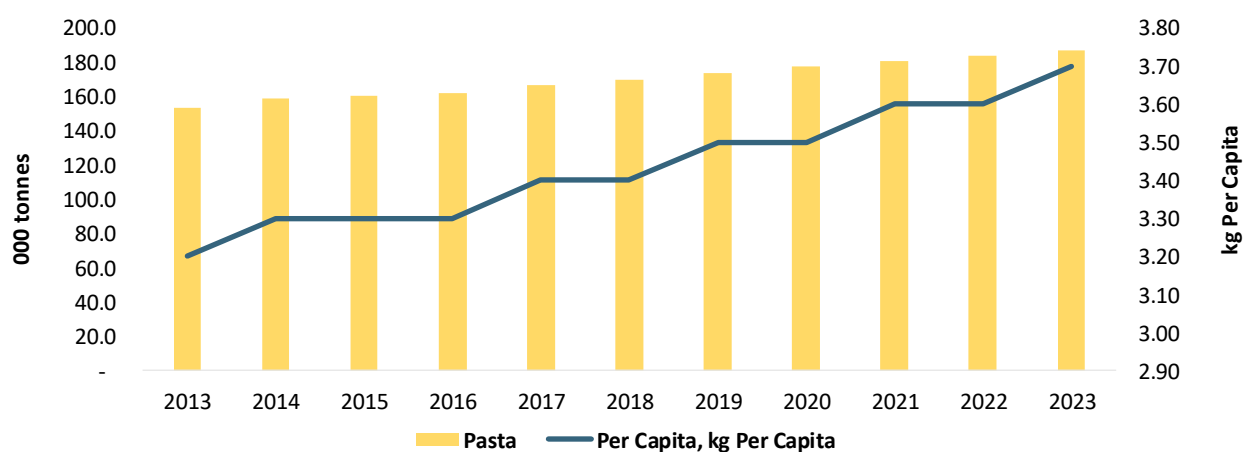
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ Italian pasta is highly valued. ▪ EU accounts for most imports of pasta. ▪ Per capita consumption of pasta is on the rise. 	<ul style="list-style-type: none"> ▪ Both total and per capita consumption of pasta are limited. ▪ Pasta is not usually eaten as a main dish.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ EU pasta producers benefit of a duty-free access to the Colombian market. ▪ Healthier types of pasta, e.g. wholegrain pasta, are highly valued by health-conscious consumers. ▪ Consumption of pasta is higher in large cities. 	<ul style="list-style-type: none"> • Domestic production accounts for most sales in the country. • Mexican exports of pasta are rather high in volume and value.

5.11.2 Consumption

5.11.2.1 Evolution of consumption

In Colombia, total pasta consumption grew at an annual rate of 2.1% in 2013-2018 and is projected to see **sustained growth in the coming years**, passing from above 166 600 tonnes in 2018 to nearly 187 200 tonnes in 2023 (Figure 5-48). Per capita consumption of pasta, which grew from 3.2 kg per capita in 2013, to 3.4 in 2018, is expected to moderately increase in the future, exceeding 3.7 kg in 2023.

Figure 5-48: Evolution and forecast of market for pasta (000 tonnes) and per capita (kg) pasta consumption in Colombia, 2013-2023



Source: Euromonitor International: Packaged Foods, 2019.

Note: figures for 2018 to 2023 based on forecasts.

5.11.2.2 Consumer profile and purchase criteria

Consumers

Consumption of pasta is relatively low in the country, as this dish is normally considered a side dish, rather than a main course. Indeed, within the Latin American region, Colombia is the fourth minor consumer of pasta.¹⁰⁸ Most consumers of pasta are concentrated in large cities and touristic areas, where a wide choice of Italian restaurants can be easily found.

Drivers and method of consumption

Depending on the region and climate, consumers have different preferences with regards to pasta. Notably, in the main cities of Colombia, consumers like to eat Fusilli with chicken and bacon sauce, as well as Lasagne with Bolognese sauce, which can be found on the menu of different restaurants. In cold climates, pasta with vegetable soups is more popular; while in warm climate, consumers are more likely to choose pasta salads with tuna, chicken and vegetables. The most popular types of pasta are Fusilli, Penne Rigate, Spaghetti, Fettucine and Linguine, in preparations such as: Spaghetti alla Bolognese, Fettucine all'Amatriciana, and Lasagne, as well as in soups and salads.¹⁰⁹

Purchase criteria

Regarding pasta, the main Colombians' purchase criteria can be summarised as follows:

- **Price:** consumers usually look for the best deals and discounts, and pasta is considered an affordable product.
- **Health-orientation:** health-conscious consumers have a preference for fortified, wholegrain, or high in fibres pasta, which is considered healthy. Gluten-free pasta was also recently introduced in the Colombian market by Productos Alimenticios Doria.
- **Versatility:** pasta is preferred to other staples because of its versatility, as it can be cooked as a main dish, a side dish or as an ingredient in salads.
- **Origin:** Colombians have a preference for domestic brands, however Italian pasta is highly-valued, especially by wealthier consumers.

5.11.2.3 Recent market trends

Sales of pasta are set to moderately grow over the next years, due to the product's affordability, convenience and wider availability of imported products across the country.

¹⁰⁸ Cada uno de los colombianos solo consume tres kilogramos de pasta cada año, <https://www.larepublica.co/empresas/cada-uno-de-los-colombianos-solo-consume-tres-kilogramos-de-pasta-cada-ano-2843327>

¹⁰⁹ What are the types of pasta preferred by Colombians?, <https://www.wradio.com.co/noticias/economia/cuales-son-los-tipos-de-pasta-preferidos-por-los-colombianos/20181025/nota/3816338.aspx#>

5.11.3 Offer

5.11.3.1 Domestic production

Due to the absence of a culture of pasta, volumes produced in Colombia are rather limited, in global terms. However, production of pasta and noodles combined is sufficient to satisfy domestic consumption. Indeed, **most local production (over 90%) is sold within the country of origin**. As outlined in Table 5-6, Colombia produced **172 379 tonnes of pasta and noodles**, for a total value of EUR 152 million. Colombia also produced around 435 and 653 tonnes of ready ravioli and lasagne, in 2017.

Table 5-6: Pasta production volume and value, 2017

Product	Volume, tonnes	Value, 000 EUR
Noodles and pasta	172 379	152 061
Ravioli	435	2 864
Lasagne	653	2 522

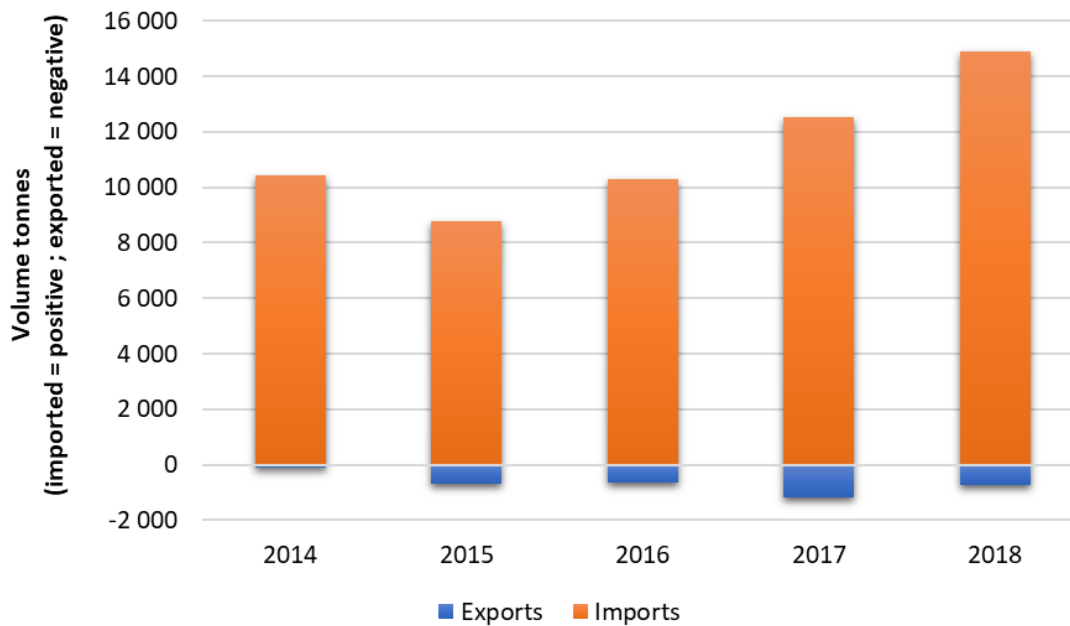
Source: Agra CEAS based on DANE figures.

5.11.3.2 Imports and exports

Despite the considerable production volumes of pasta and noodles combined, Colombia is a net importer of pasta (Figure 5-49). Imports saw a sustained growth since 2015, peaking in 2018, when they reached 14 880 tonnes. As outlined in Figure 5-50, **Italy accounted for 43% of total imports by volume**, in 2018. Imports of pasta from Italy have almost tripled between 2014 and 2018, as the EU-Andean FTA has enormously facilitated exports of products. Other significant importers were Mexico and Slovenia, which accounted for respectively 25% and 16% of the total volumes imported in 2018.

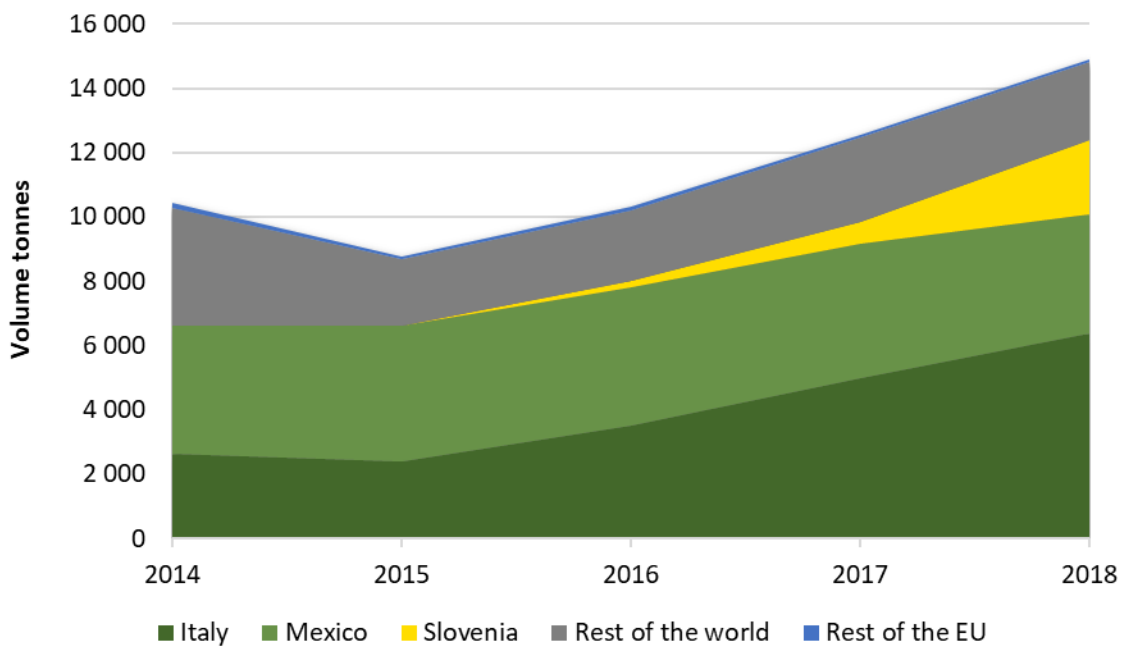
Along with exporting the largest volume of pasta into Colombia, Italy is also the first exporter in terms of value. Nonetheless, the unit value of Italian pasta was below the average (1 067 EUR/tonne), in 2018 (Figure 5-51).

Figure 5-49: Trade balance (imports and exports) of pasta in Colombia, 2014-18; tonnes



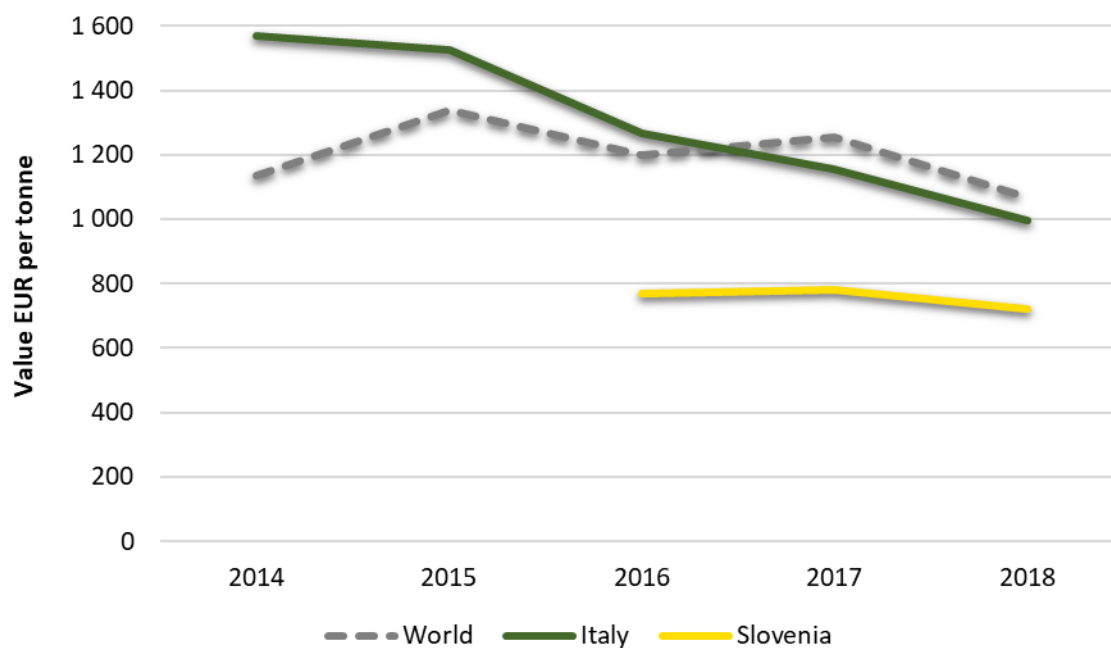
Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
 Data for CN code 1902.

Figure 5-50: Colombian imports of pasta by country, 2014-2018; tonnes



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
 Data for CN code 1902.

Figure 5-51: Per unit value of Colombian imports of pasta for selected countries, 2014-18 (EUR per tonne)



Note: 2014 and 2015 unit value of Slovenian exports are not available.

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 1902.

5.11.3.3 Main competitors

Colombia's production of pasta and noodles combined is high. Indeed, imported pasta accounts for a small share of total domestic consumption (less than 10%). Among the exporters, Mexico, which accounts for a third of total imports of pasta by volume, is a considerable competitor in the Colombian market. Productos Alimenticios Doria remained the domestic leader in pasta in 2018 thanks to its strong distribution network, active new product development and strong brand reputation. Doria also consistently implements strong advertising campaigns and offers products across all price tiers.¹¹⁰

5.11.4 Specific market entry requirements

Market Access and Entry

As reported in section 4.2.1, pasta producers must submit the Import Registration form to the MINCOMEX and pay duties in order to ship their products to Colombia. Imported products must comply with Law 9/1979, as well as all with further food and safety rules, as described in detail in section 4.2.2.

In terms of tariffs, **EU pasta benefits from a duty-free access to the Colombian market**, under the EU-Andean Trade Agreement.

¹¹⁰ Euromonitor International: Packaged Food, 2019.

Detailed information on import duties and Rules of Origin can be consulted on the European Commission website:

<https://madb.europa.eu/madb/atDutyOverviewPubli.htm?countries=CO&hscod=1902>

Customs procedures

A list of standard documents required for import pasta into Colombia is presented in section 4.2.1 (Table 4-1). Furthermore, as outlined in Table 4-2 in section 4.2.1, the following documents are requested to ship pasta to Colombia:

- Sanitary Registration of Foodstuffs,
- Preliminary Import Registration,
- Authorisation of Foreign Foodstuffs Manufacturers,
- Certificate of Analysis,
- Certificate of Fumigation (merely concerning pasta containing eggs and stuffed pasta).

Any other up to date information on appropriate documents concerning customs procedures can be consulted on European Commission website:

<https://madb.europa.eu/madb/datasetPreviewIpubli.htm?countries=CO&hscod=1902>

SPS measures

All sanitary and Phytosanitary measures concerning the import of pasta into Colombia are in line with international standards.

Up to date information on appropriate documents concerning SPS measures:

<https://madb.europa.eu/madb/datasetPreviewIpubli.htm?countries=CO&hscod=1902>

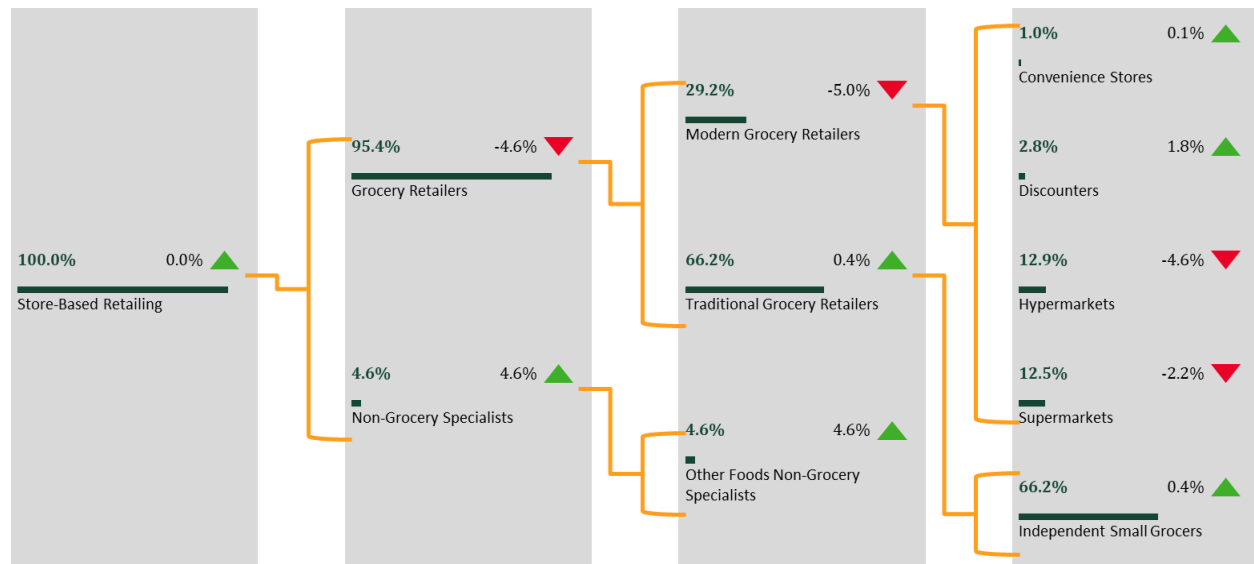
Labelling

As described in more detail in section 4.2.3, pasta must comply with generic labelling rules, as provided for in Resolutions 5109/2005 and 1506/2011.

5.11.5 Distribution

As reported in Figure 5-52, **sales of pasta rely on store-based retailing**. In 2018, traditional grocery retailers (especially independent small grocers) were the main distribution channel for pasta (66.2%). Modern grocery retailers followed, with hypermarkets (12.9%), supermarkets (12.5%), and discounters (1.8%) accounting for most of the sales in the category. However, except for discounters, modern grocery retailers are losing ground.

Figure 5-52: Distribution channels overview of pasta in Colombia (2018); retail value



Source: Euromonitor International: Packaged Food, 2019.

5.11.6 Challenges for EU products

Although EU producers have a duty-free access to the Colombian pasta market, they face the competition of domestic producers, which are dominant. Imports, indeed, account for a small share of total sales of pasta, and consumers often have a preference for local brands.

Market Takeaway: Pasta

Consumption: Sales of pasta are rather limited, as Colombians do not have a culture of pasta. However, consumption is on the rise.

Competition: Domestic producers dominate the market; Mexico is a significant exporter of pasta into Colombia.

Distribution: Pasta is mostly sold through independent small grocers. Modern grocery retailers are losing ground.

Challenges: The opportunities for imported pasta are limited, as most consumers prefer local brands.

Opportunities: Wholegrain pasta, fortified pasta and high in fibres pasta are gaining ground among health-conscious consumers; Upper-income consumers have a taste for premium pasta.

5.12 Jams

5.12.1 SWOT analysis

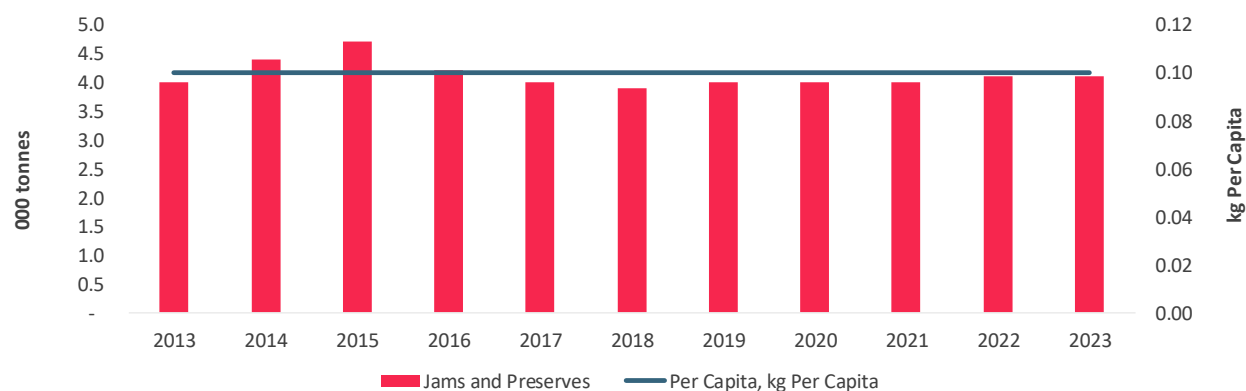
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ Colombians have a taste for jam, which is popularly eaten with arepas, bread and obleas. ▪ Imports of jams are on the rise. 	<ul style="list-style-type: none"> ▪ Consumption rates declined in the last years. ▪ Price remains a key purchase criterion. ▪ Sales are increasingly driven by health considerations.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ Natural and healthier products, with a lower content of sugar, are growing in popularity. 	<ul style="list-style-type: none"> • Wide availability of fruits, allows Colombia to produce several different types of jams. ▪ Imports are dominated by Chile and Mexico. ▪ Some EU jams products face a tariff quota.

5.12.2 Consumption

5.12.2.1 Evolution of consumption

As illustrated in Figure 5-53, **total sales of jams and preserves recorded a negative performance in 2013-2018**, down to nearly 3 900 tonnes in 2018. However, consumption is projected to recover over the next few years, reaching about 4 100 tonnes in 2023. Per capita consumption of jams and preserves is rather limited and is expected to stagnate in the future.

Figure 5-53: Evolution and forecast of jams and preserves (000 tonnes) in Colombia, 2013-2023; total volume



Source: Euromonitor International: Packaged Food, 2019.

5.12.2.2 Consumer profile and purchase criteria

Consumers

Jams are rather popular in Colombia, as both adults and children are used to using it at breakfast or with snacks. Blackberry jam is amongst the most popular ones; however, given the great availability of fruits across the country, consumers have a wide choice amongst different types of jams (see also section 5.12.3.1).

Drivers and method of consumption

Colombians have a taste for jam, although **concerns over sugar consumption are affecting consumption of this product**. Consumers are indeed increasingly shifting to craft or home-made products, which are perceived as more natural and healthier.

Colombians usually opt for jams at breakfast; *arepas*, which are sweet corn cakes are normally served with butter and topped jams or salty ingredients. Jams and preserves are also consumed in the afternoon with bread, crackers or yoghurt. Furthermore, two popular desserts are served with jam, namely *oblea*, a thin, round, brown wafer spread with jam, as well as *torta Maria Luisa*, which is filled with fruit jam.

Purchase criteria

As consumers are becoming increasingly health-conscious, their sales are increasingly driven by **nutritional considerations**. Notably, concerns regarding sugar content affect the sales of jams. However, **price remains a key purchase criterion**, as demonstrated by the increasing share of sales of jams through discounters (see section 5.12.5).

5.12.2.3 Recent market trends

Jams and preserves was one of the most affected categories within sweet spreads by the economic deceleration experienced in 2016-2017. However, sales in the category are set to recover over the next years.¹¹¹

5.12.3 Offer

5.12.3.1 Domestic production

Colombia produces one of the widest ranges of fruit in the world (see also section 5.1.2.1, within the Fresh Fruit and Vegetables snapshot). Most popular jams are made from pineapple, tree tomatoes, guanabana, strawberry, blackberry, mango, banana and raspberry. Given the relatively wide availability of fruit to manufacture jams, **Colombia's offer of jams and preserves exceeds the internal demand**. As outlined in Table 5-7, in 2017, Colombia produced around 10 756 tonnes of purée fruit, 5 969 tonnes of fruit jams and 721 tonnes of other products within the category.

Table 5-7: Jams and preserves production volume and value, 2017

Product	Volume, tonnes	Value, 000 EUR
Purée fruits	10 756	12 852
Fruit jam	5 969	8 445
Other jams and marmalades	721	2 945

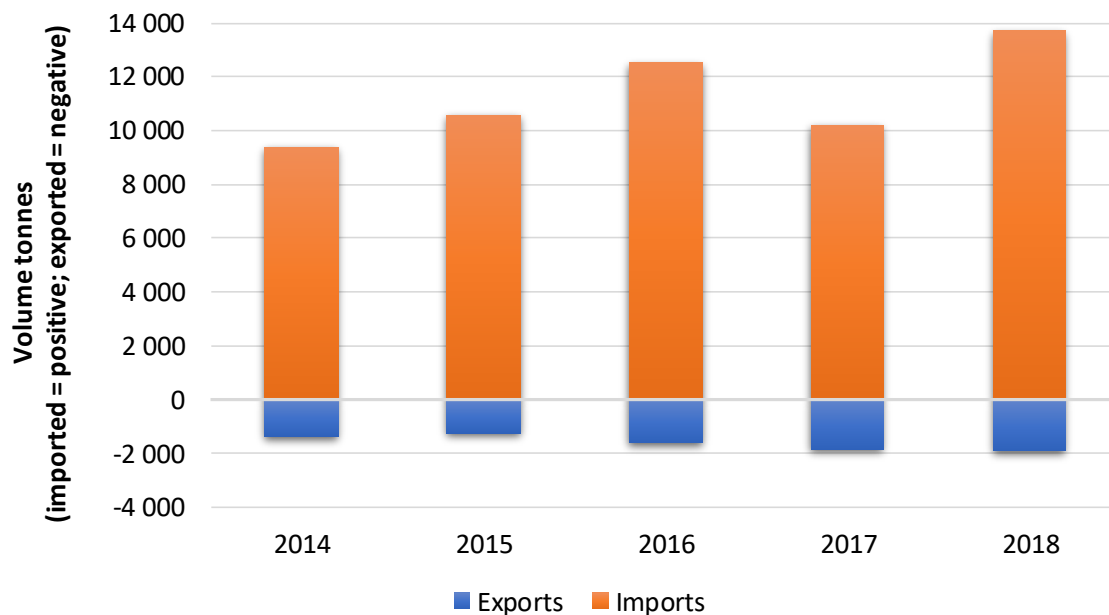
Source: Agra CEAS based on DANE figures.

¹¹¹ Euromonitor International: Packaged Food, 2019.

5.12.3.2 Imports and exports

As outlined in Figure 5-54, despite the large domestic production, **Colombia's volumes of imported jams largely exceed exports**. With the exception of 2016, when imports volumes fell below the 2015 value, imports recorded a tendential growth, reaching 13 732 tonnes in 2018. Also exports have shown a growing trend, although they stayed below 2 000 tonnes, in 2018.

Figure 5-54: Trade balance (imports and exports) of jams and fruit purees in Colombia, 2014-18; tonnes

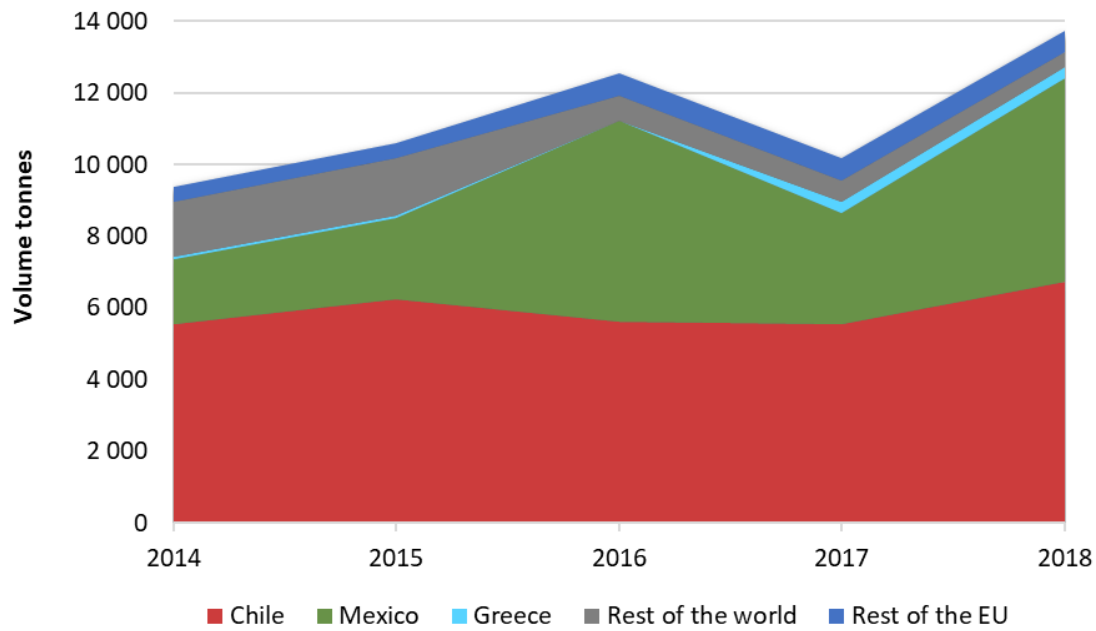


Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN code 2007.

The largest importers of jams in terms of volume are Chile and Mexico, respectively accounting for 49% and 41% of 2018 total imports by volume. Amongst the EU countries, Greece took the lead, with 302 tonnes imported into Colombia, in 2018. Other EU Member States accounted for a further 4% of total imports by volume, with the Netherlands, Spain and France accounting for nearly all of these shipments.

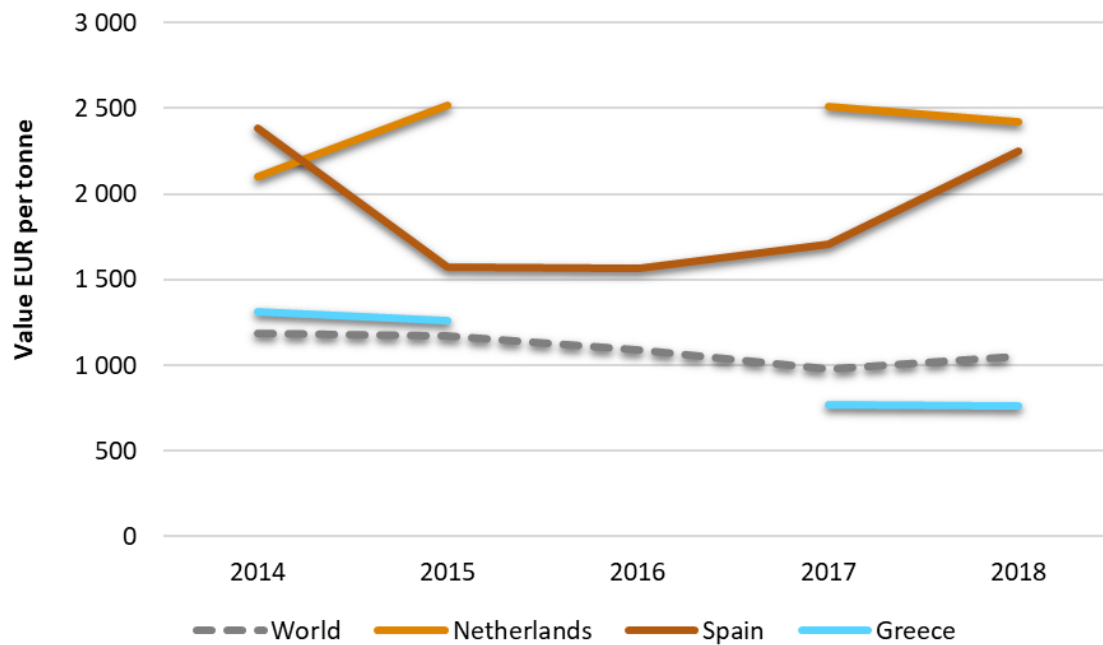
Not only they are the largest imports in terms of volume, Chile and Mexico also account for most imports in terms of value. Per unit value of imported EU jams varied between countries, with Greece recording the lowest value, namely 763 EUR/tonne, in 2018. Spanish and Dutch imports, on the other hand, were highly valued.

Figure 5-55: Colombian imports of jams by country, 2014-18; tonnes



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
 Data for CN code 2007.

Figure 5-56: Per unit value of Colombian imports of jams for selected countries; 2014-2018; (value EUR per tonne)



Note: 2016 Per unit value of Colombian imports of jams from Greece and the Netherlands were not available.

Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
 Data for CN code 2007.

5.12.3.3 Main competitors

Given the wide availability of fruit across the country, it is hardly surprising that Colombia's production of jams is substantial. Furthermore, Chile and Mexico exporters account for most shipments of such products into Colombia.

5.12.4 Specific market entry requirements

Market Access and Entry

As reported in section 4.2.1, jams producers must submit the Import Registration form to the MINCOMEX and pay duties in order to ship their products to Colombia. Imported products must comply with Law 9/1979, as well as all with further food and safety rules, as described in detail in section 4.2.2.

In terms of tariffs, some **EU jams face 15% rates above a tariff quota of 7 867 tonnes for goods with a sugar content of 70% or more**. This is the case for the products outlined below:

- Jams, fruit jellies, marmelades (CN codes 2007.91.10 and 2007.99.91)
- Purée and pastes (CN code 2007.91.20 and 2007.99.92)

Detailed information on import duties and Rules of Origin can be consulted on the European Commission website:

<https://madb.europa.eu/madb/atDutyOverviewPubli.htm?countries=CO&hscod=2007>

Customs procedures

A list of standard documents required for import jams into Colombia is presented in section 4.2.1 (Table 4-1). Furthermore, as outlined in Table 4-2 in section 4.2.1, the following documents are requested to ship jams products to Colombia:

- Sanitary Registration of Foodstuffs,
- Preliminary Import Registration,
- Authorisation of Foreign Foodstuffs Manufacturers,
- Certificate of Analysis.

Any other up to date information on appropriate documents concerning customs procedures can be consulted on European Commission website:

<https://madb.europa.eu/madb/datasetPreviewIFpubli.htm?countries=CO&hscod=2007>

SPS measures

All sanitary and Phytosanitary measures concerning the import of jams into Colombia are in line with international standards.

Up to date information on appropriate documents concerning SPS measures:

<https://madb.europa.eu/madb/datasetPreviewIFpubli.htm?countries=CO&hscod=2007>

Labelling

As described in more detail in section 4.2.3, jams must comply with generic labelling rules, as provided for in Resolutions 5109/2005 and 1506/2011.

5.12.5 Distribution

Nearly all sales of spreads, including jams, took place through grocery retailers. In 2018, independent small grocers were the main distribution channel for spreads, with a 53% share, followed by modern grocery retailers (47%). Amongst the latter, hypermarkets took the lead with a 23% share, followed by supermarkets (21%) and discounters (almost 3%). Sales of spreads through discounters and independent small grocers posted the highest growth, in 2018. On the contrary, hypermarkets and supermarkets recorded a negative performance.

Figure 5-57: Distribution channel overview of butter and spreads (including jams) in Colombia (2018); retail value



Source: Euromonitor International: Packaged Food, 2019.

5.12.6 Challenges for EU products

Consumption of jams recorded a negative performance, mainly due to the economic deceleration of 2016-17. Furthermore, EU exporters face competition from domestic producers and imported jams from Chile and Mexico, which are usually available at lower prices. Finally, some EU products are also subject to tariff quotas.

Market Takeaway: Jams

Consumption: Sales recorded a negative performance in 2013-18; however, they are projected to recover.

Competition: Domestic production is strong; imports from Chile and Mexico challenge EU exporters.

Distribution: Jams are mostly distributed through independent small grocers, hypermarkets, and supermarkets.

Challenges: The wide availability of several locally-produced jams poses a challenge to EU exporters. Also, consumers of jams are price-sensitive; Finally, some EU products face tariff quotas.

Opportunities: Healthier products, e.g. with a lower content of sugar, are set to gain market share.

5.13 Biscuits and cereal bars

5.13.1 SWOT analysis

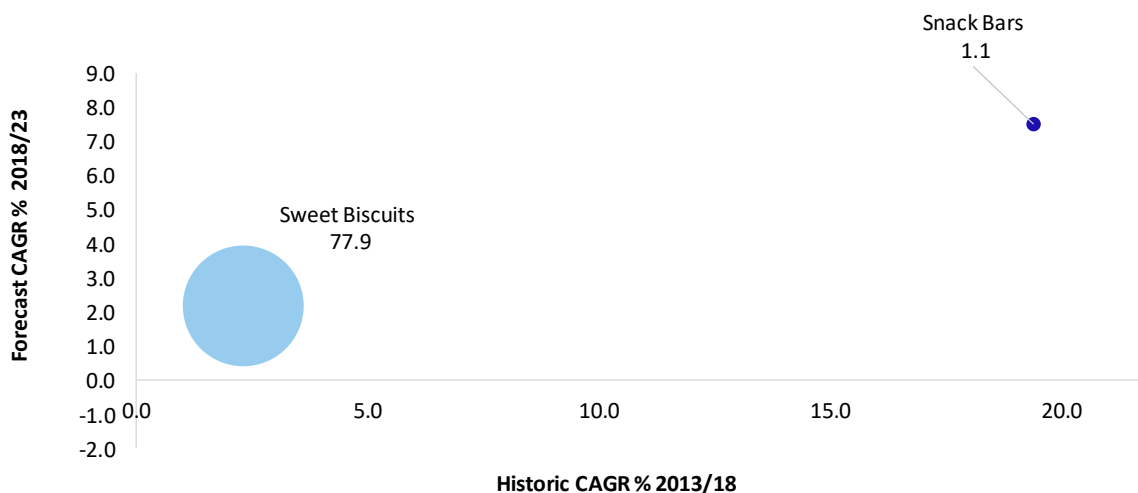
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ Sales in the category are on the rise. ▪ EU companies account for most exports of cereal bars. ▪ EU products are granted duty-free access to the Colombian market. 	<ul style="list-style-type: none"> ▪ Consumer prefer salty snacks to sweet ones. ▪ Entry market procedures can be lengthy and burdensome.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ Health-conscious consumers have a preference for high fiber and low sugar products. ▪ Busy workers increasingly purchase biscuits and cereal bars. 	<ul style="list-style-type: none"> • Domestic production is relatively wide. • Imports of biscuits are dominated by non-EU countries.

5.13.2 Consumption

5.13.2.1 Evolution of consumption

The market share of sweet snacks in Colombia is rather small, as consumers have a preference for salty snacks. In 2018, consumption of sweet biscuits reached 77 900, vis-à-vis 1 100 tonnes purchases in the snack bars segment. Both categories recorded a **positive growth over the past five years**, with snack bars posting a double-digit growth (by 19.4%).

Figure 5-58: Evolution and forecast of sweet biscuits and snack bars in Colombia, 2013-2023; total volume



Source: Euromonitor International: Packaged Foods, 2019.

5.13.2.2 Consumer profile and purchase criteria

Consumers

In Colombia, biscuits are normally eaten by both adults and children as snacks. However, increasingly busy consumer lifestyles have seen snacking become a **more important option for adults**, when there is little or no time for a full meal. As a result, adults are becoming the key target for biscuits and snack bars.¹¹²

Drivers and method of consumption

Colombians usually have biscuits and cereal bars as a snack in the afternoon. In this sector, a healthy trend can be observed, with consumers seeking healthier options, such as high fibre and low in sugar biscuits and bars.¹¹³

Purchase criteria

Colombian consumers highly value price and convenience. However, they are also gradually becoming more health-conscious, hence they pay more attention to the nutritional values of products and their composition.

5.13.2.3 Recent market trends

Sales within the category of sweet biscuits and snack bars are expected continue to rise over the next few years. However, in both segments, growth will tendentially slow down compared to the previous period (2013-18), mostly driven by health concerns.¹¹⁴

5.13.3 Offer

5.13.3.1 Domestic production

According to latest DANE figures, Colombia produced 121 256 tonnes of sweet biscuits in 2017. Unlike other Latin American countries, where sweet biscuits are a dominant segment within the snack category, Colombia is a larger producer of salty snacks.

5.13.3.2 Imports and exports

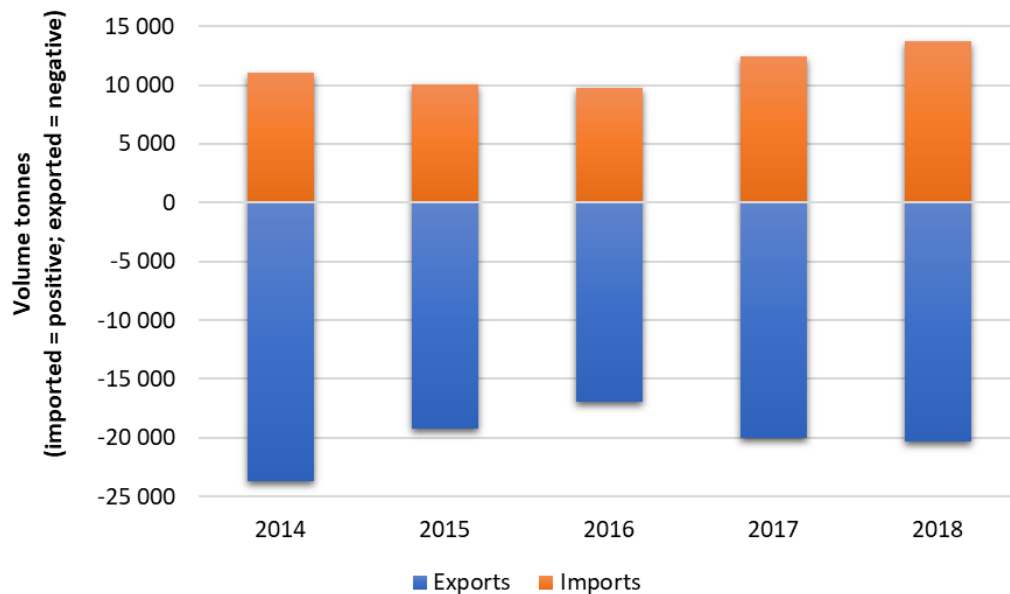
As set out in Figure 5-59 and Figure 5-60, while Colombia is a net exporter of sweet biscuits, waffles and wafers, the country almost only imports cereal bars. Imports of biscuits, waffles and wafers have shown a positive trend in the last years, growing from 8 776 tonnes in 2016, to 12 094 in 2018. On the contrary, imports of cereal bars have dramatically dropped in recent years, down to 645 tonnes in 2018.

¹¹² Euromonitor International: Packaged Food, 2019.

¹¹³ *Ibid.*

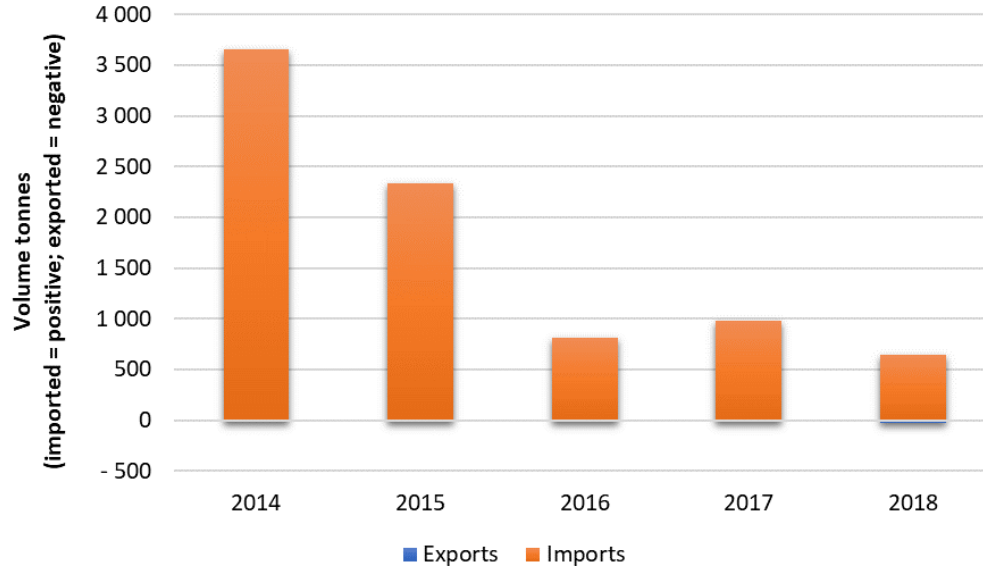
¹¹⁴ *Ibid.*

Figure 5-59: Trade balance (imports and exports) of biscuits, waffles and wafers in Colombia, 2014-18; tonnes



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN codes 190531 and 190532.

Figure 5-60: Trade balance (imports and exports) of cereal bars in Colombia, 2014-18; tonnes



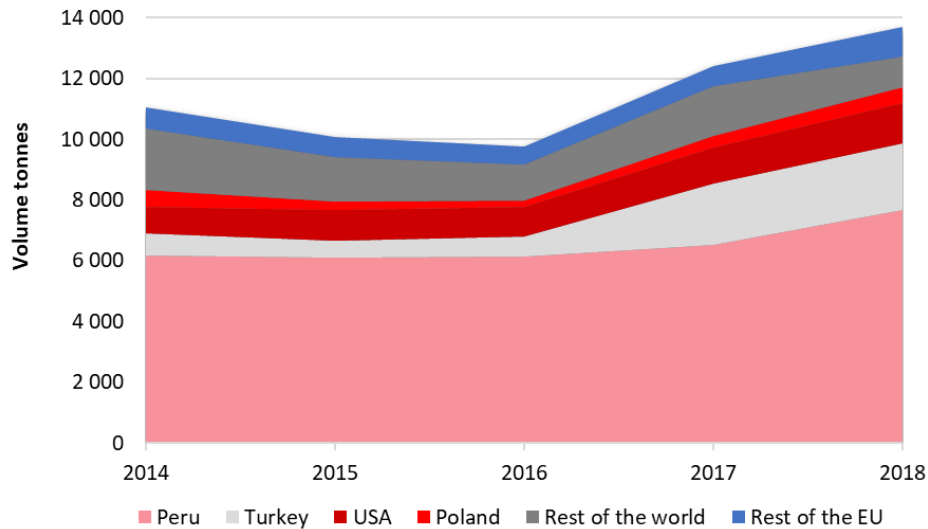
Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN code 1904200000.

In 2018, most **biscuits, waffles and wafers imported into Colombia came from Peru** (56% of total volumes). Also, Turkish and US companies shipped large volumes of biscuits, accounting for 16% and 9% of total imports by volume respectively. Amongst EU exporters, Poland took the lead, with 536 tonnes exported to Colombia (or 4% of total imported volumes). The rest of the EU accounted for a further 7%

of total imported volumes, split between producers from Spain, Denmark, Netherlands and Portugal (Figure 5-61).

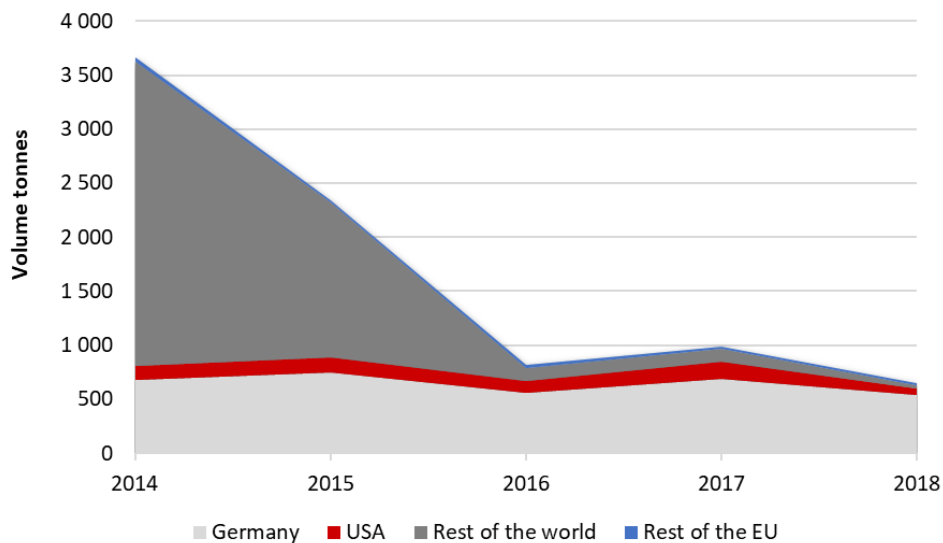
The situation is rather different for **cereal bars**, where **EU producers dominate imports**. Notably, German imports accounted for 83% of total volumes shipped into Colombia, in 2018; US imports lagged far behind, accounting for a mere 9% (Figure 5-62).

Figure 5-61: Colombian imports of biscuits, waffles and wafers by country, 2014-18; tonnes



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN codes 190531 and 190532.

Figure 5-62: Colombian imports of cereal bars by country, 2014-18; tonnes



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN code 1904200000.

5.13.3.3 Main competitors

EU companies that wish to export biscuits and cereal bars to Colombia face competition from strong local producers. Furthermore, Peru and Turkey (biscuits) and the United States (cereal bars) account for large shares of imports. In terms of company shares, Cía de Galletas Noel continues to be the leader in biscuits and cereal bars.

5.13.4 Specific market entry requirements

Market Access and Entry

As reported in section 4.2.1, producers of biscuits and cereal bars must submit the Import Registration form to the MINCOMEX and pay duties in order to ship their products to Colombia. Imported products must comply with Law 9/1979, as well as all with further food and safety rules, as described in detail in section 4.2.2.

In terms of tariffs, biscuits and cereal bars are granted duty-free access to the Colombian market, under the EU-Andean Free Trade Agreement.

Detailed information on import duties and Rules of Origin can be consulted on the European Commission website:

<https://madb.europa.eu/madb/atDutyOverviewPubli.htm?countries=CO&hscod=190531>

<https://madb.europa.eu/madb/atDutyOverviewPubli.htm?countries=CO&hscod=190532>

<https://madb.europa.eu/madb/atDutyOverviewPubli.htm?countries=CO&hscod=190402>

Customs procedures

A list of standard documents required for import biscuits and cereal bars into Colombia is presented in section 4.2.1 (Table 4-1). Furthermore, as outlined in Table 4-2 in section 4.2.1, the following documents are requested to ship jams products to Colombia:

- Sanitary Registration of Foodstuffs,
- Preliminary Import Registration,
- Authorisation of Foreign Foodstuffs Manufacturers,
- Certificate of Analysis,
- Certificate of Fumigation (only applicable to cereal bars).

Any other up to date information on appropriate documents concerning customs procedures can be consulted on European Commission website:

<https://madb.europa.eu/madb/datasetPreviewIFpubli.htm?countries=CO&hscod=190531>

<https://madb.europa.eu/madb/datasetPreviewIFpubli.htm?countries=CO&hscod=190532>

<https://madb.europa.eu/madb/datasetPreviewIFpubli.htm?countries=CO&hscod=190402>

SPS measures

All sanitary and Phytosanitary measures concerning the import of biscuits and cereal bars into Colombia are in line with international standards.

Up to date information on appropriate documents concerning SPS measures:

<https://madb.europa.eu/madb/datasetPreviewIfpubli.htm?countries=CO&hscod=190531>

<https://madb.europa.eu/madb/datasetPreviewIfpubli.htm?countries=CO&hscod=190532>

<https://madb.europa.eu/madb/datasetPreviewIfpubli.htm?countries=CO&hscod=190402>

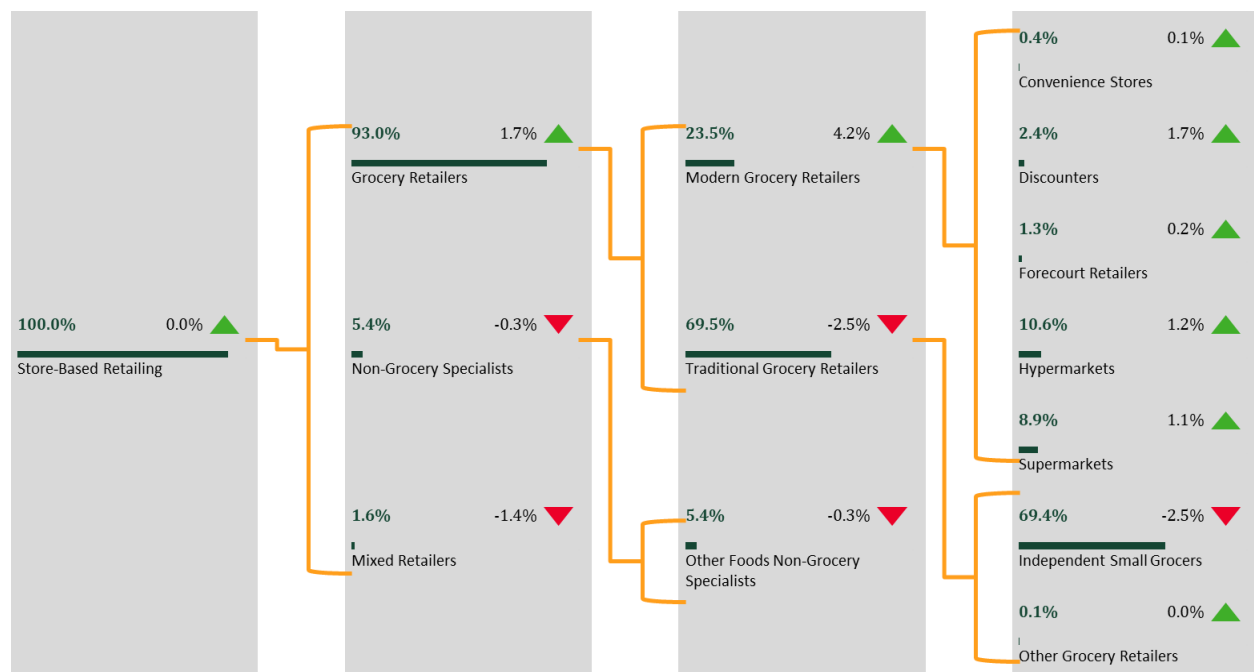
Labelling

As described in more detail in section 4.2.3, biscuits and cereal bars must comply with generic labelling rules, as provided for in Resolutions 5109/2005 and 1506/2011.

5.13.5 Distribution

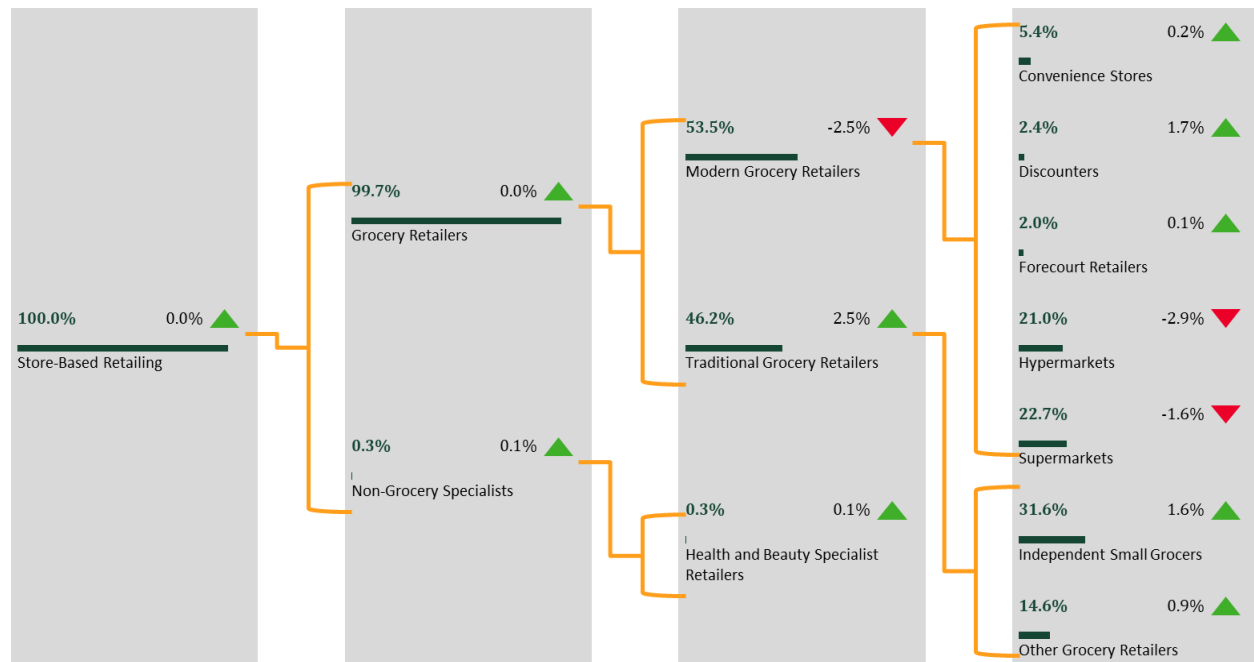
Distribution of both biscuits and cereal bars is dominated by grocery retailers. However, while traditional grocery retailers are the main distribution channel for biscuits (accounting for nearly 70% of total sales), over half sales of cereal bars are done through modern grocery retailers.

Figure 5-63: Distribution channel overview of sweet biscuits in Colombia (2018); retail value



Source: Euromonitor International: Packaged Food, 2019.

Figure 5-64: Distribution channel overview of snack bars (including cereal bars) in Colombia (2018); retail value



Source: Euromonitor International: Packaged Food, 2019.

5.13.6 Challenges for EU products

Colombians have a preference for salty snacks, rather than sweet ones. This trend is on the rise, driven by the growing number of health-conscious consumers. Furthermore, local producers and non-EU exporters dominate the biscuits market. Finally, several documents are requested to access the market, making the import procedures lengthy and burdensome, in some cases.

Market Takeaway: Biscuits and cereal bars

Consumption: Consumption is on the rise, particularly in the cereal bars segment, driven by busy consumers.

Competition: Domestic producers and non-EU exporters have a dominant role in the biscuit and cereal bars market.

Distribution: While sales of biscuits are mostly done through independent small grocers, cereal bars distribution channels are more diverse.

Challenges: Entry market procedures can be lengthy and burdensome.

Opportunities: EU products benefit from duty-free access to the Colombian market; The healthy segment is booming.

5.14 Ice cream

5.14.1 SWOT analysis

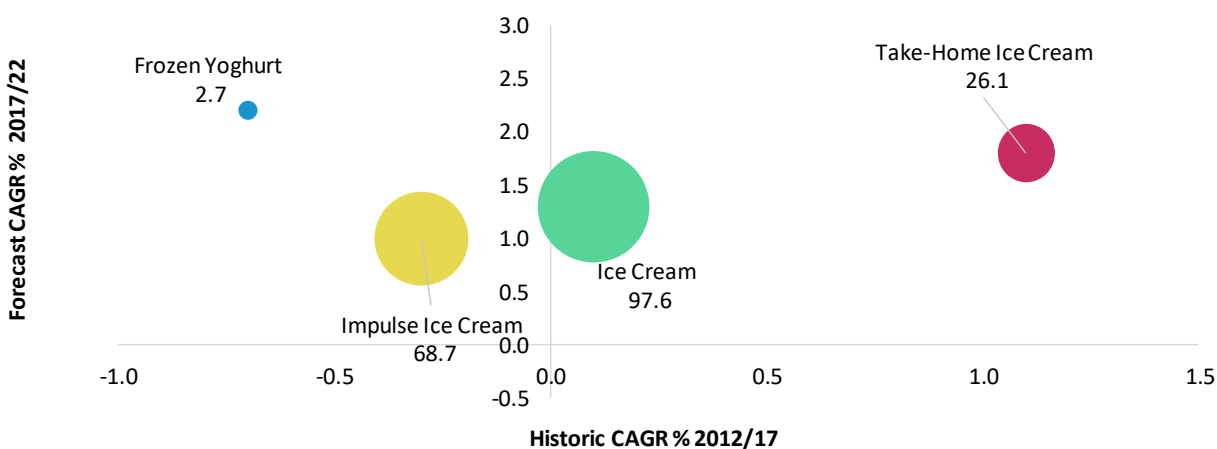
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> ▪ Colombians have a taste for milk ice cream. ▪ Polish ice cream accounts for most imports of ice cream. 	<ul style="list-style-type: none"> ▪ Colombians prefer unpackaged ice cream, to be shared in company of friends. ▪ EU ice cream faces tariff quotas.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> ▪ Consumption and imports levels are growing. ▪ Ice cream is increasingly perceived as a product for all seasons. ▪ People of all socioeconomic levels have access to this product. 	<ul style="list-style-type: none"> • Volume of imported packaged ice cream is very low. • Strong domestic production. • Increasing number of outlets where ice cream is sold unpackaged.

5.14.2 Consumption

5.14.2.1 Evolution of consumption

Driven by growth in take-home ice cream, total sales of ice cream recorded a slight increase in 2013-18, by 0.1%. With nearly 69 million litres sold in 2018, the most popular segment within the category continued to be impulse ice cream, followed by take-home ice cream (26 million litres). Frozen yoghurt is, on the contrary, not very popular amongst Colombians. Per capita consumption of ice-cream stood at 2 litres in 2018 and is expected to remain steady over the next years.

Figure 5-65: Evolution and forecast of market for ice cream (000 tonnes) in Colombia, 2013-2023



Source: Euromonitor International: Packaged Food, 2019

Note: figures for 2018 to 2023 based on forecasts.

5.14.2.2 Consumer profile and purchase criteria

Consumers

In Colombia, people of all ages consume ice cream, especially adults in the age between 18 and 55, followed by children under 12 years old. Furthermore, women purchase ice cream more often than men. In terms of preferences, Colombians are more willing to opt for an unpackaged ice cream in company of friends and family. However, packaged ice cream is growing in importance. Notably, dairy ice cream dominate take-home sales, although it is also largely preferred as an impulse product. Consumers prefer dairy ice cream because of its nutritional properties, but also because they prefer its taste and aspect. The less popular water ice cream remains an impulse product.^{115 116117}

Drivers and method of consumption

Most consumers purchase ice cream in shops, ice cream stores, supermarkets, as well as through the famous *tilines* selling ice cream in the street. There are, indeed, over 200 000 ice cream shops in Colombia and about 20 000 *tilines*; however, both sell mostly unpackaged products.

The main drivers for the consumption of ice cream can be summarised as follows:

- Wider offer: unlike in the past, ice cream is currently available at most supermarkets, restaurants, fruit shops, bakeries and several other outlets.
- Acceptance of ice cream as a product for all seasons: ice cream is increasingly being consumed in colder seasons as well.
- Product of mass consumption: due to its low price, ice cream is accessible to people of all ages and socioeconomic levels. However, sales have been mostly driven by the middle-class.¹¹⁸¹¹⁹

Purchase criteria

When purchasing ice cream, consumers largely pay attention to price. However, they are also increasingly health-conscious, hence they have a growing preference for low-in sugar products. That said, as noted above ice cream is often an impulse purchase in Colombia, meaning that the above purchase criteria may be overlooked by some consumers / in certain circumstances.

¹¹⁵ Euromonitor International: Packaged Food, 2019.

¹¹⁶ Colombia: Así se mueve la industria de los helados en el país, <https://www.america-retail.com/colombia/colombia-asi-se-mueve-la-industria-de-los-helados-en-el-pais/>

¹¹⁷ El mercado de helados en Colombia crece en promedio 3,1%, <https://www.revistaalimentos.com/noticias/el-mercado-de-helados-en-colombia-crece-en-promedio-31-anual/>

¹¹⁸ Colombia: Así se mueve la industria de los helados en el país, <https://www.america-retail.com/colombia/colombia-asi-se-mueve-la-industria-de-los-helados-en-el-pais/>

¹¹⁹ El mercado de helados en Colombia crece en promedio 3,1%, <https://www.revistaalimentos.com/noticias/el-mercado-de-helados-en-colombia-crece-en-promedio-31-anual/>

5.14.2.3 Recent market trends

Lately, take-home ice cream have been increasingly popular and it is expected that more and more Colombians will have preference for this type of ice cream. Dairy ice-cream are projected to dominate the sales and unpackaged distributon is widely preferred (also through *tiines*).

5.14.3 Offer

5.14.3.1 Domestic production

Colombia is a large producer of ice cream. In total, over 90 thousand tonnes of ice cream were produced in 2017, of which most were milk-based ice cream. However, fruit-based ice cream account for most production in terms of value (Table 5-8). Driven by increasing consumption, production has grown since then.

Table 5-8: Ice cream production volume and value, 2017

Product	Volume, tonnes	Value, 000 EUR
Milk-based ice cream	79 893	31 160
Fruit-based ice cream	10 924	166 717

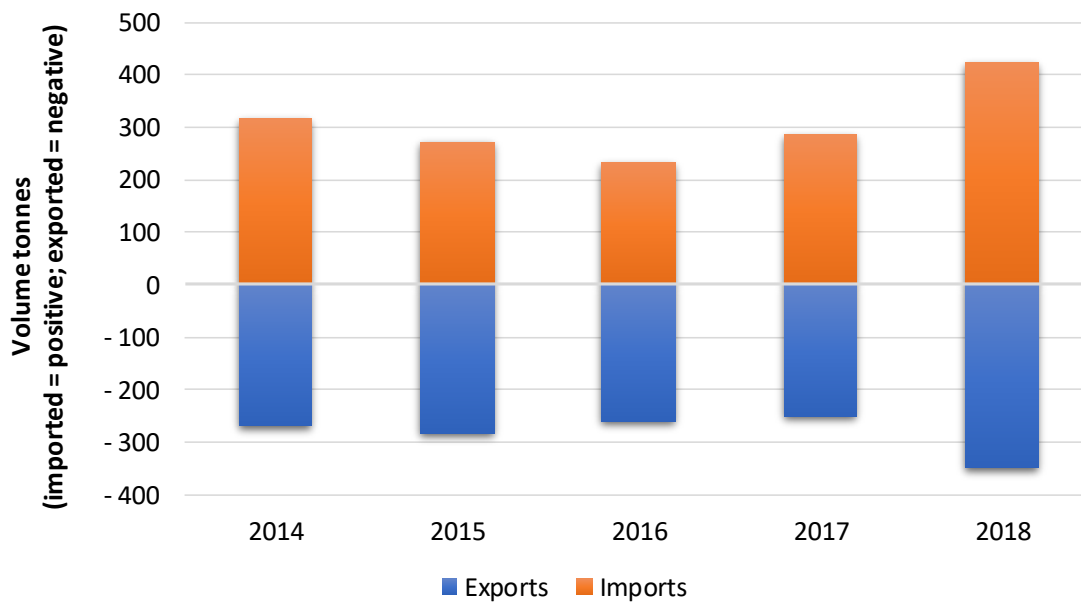
Source: Agra CEAS based on DANE figures.

5.14.3.2 Imports and exports

Colombia's imports of ice cream exceed exports, as set out in Figure 5-66. Although they have been experiencing a rapid growth, imported volumes remain modest, reaching only 422 tonnes in 2018.

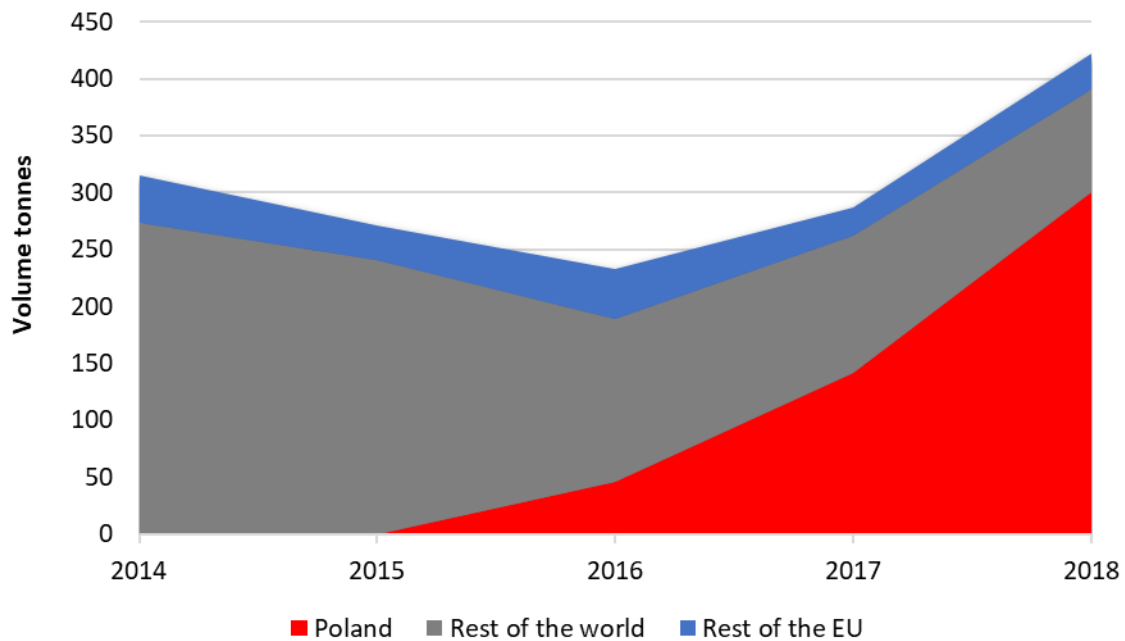
In 2018, Poland was the leading exporter of ice cream in terms of both volume and value. Nearly three quarters of all ice cream shipped to Colombia was indeed of Polish provenance (Figure 5-67), with a value of just over EUR 536 thousand. Unit value of Polish exports (1 784 EUR/tonne) was however well below the world average (Figure 5-68).

Figure 5-66: Trade balance (imports and exports) of ice cream in Colombia, 2014-18; tonnes



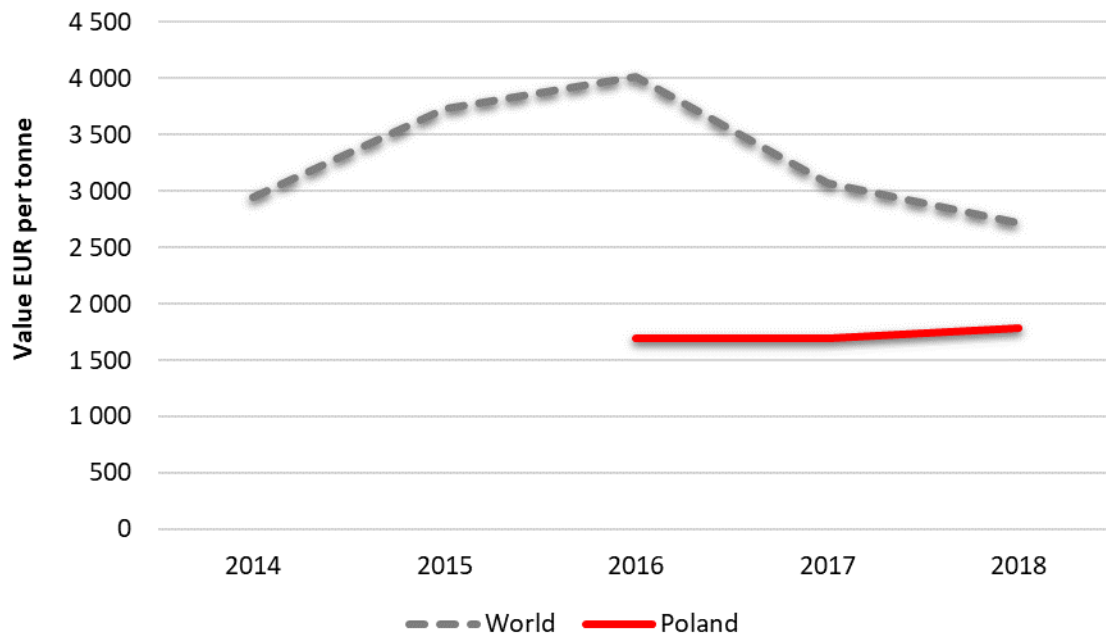
Source: Trade Map, International Trade Centre - <https://www.trademap.org/> Data for CN code 2105

Figure 5-67: Colombian imports of ice cream by country, 2014-2018; tonnes



Source: Trade Map, International Trade Centre - <https://www.trademap.org/> Data for CN code 2105

Figure 5-68: Per unit value of Colombian imports of ice cream for selected countries, 2014-18 (EUR per tonne)



Source: Trade Map, International Trade Centre - <https://www.trademap.org/> Data for CN code 2105

5.14.3.3 Main competitors

Colombian ice-cream market, as indicated in section 5.14.3.1, includes significant domestic manufacturers, which effectively should be seen as main competitors. Imports of ice-cream to Colombia are diverse in terms of countries involved, however it should be pointed out that the total volume remains rather low.

5.14.4 Specific market entry requirements

Market Access and Entry

As reported in section 4.2.1, ice cream producers must submit the Import Registration form to the MINCOMEX and pay duties in order to ship their products to Colombia. Imported products must comply with Law 9/1979, as well as all further food and safety rules, as described in detail in section 4.2.2.

In terms of tariffs, EU ice cream products face 15% rates above a tariff quota of 390 tonnes.

Detailed information on import duties and Rules of Origin can be consulted on the European Commission website:

<https://madb.europa.eu/madb/atDutyOverviewPubli.htm?countries=CO&hscod=2105>

Customs procedures

A list of standard documents required for import ice cream into Colombia is presented in section 4.2.1 (Table 4-1). Furthermore, as outlined in Table 4-2 in section 4.2.1, the following documents are requested to ship ice cream to Colombia:

- Sanitary Registration of Foodstuffs,
- Preliminary Import Registration,
- Authorisation of Foreign Foodstuffs Manufacturers,
- Certificate of Analysis.

Any other up to date information on appropriate documents concerning customs procedures can be consulted on European Commission website:

<https://madb.europa.eu/madb/datasetPreview/fpubli.htm?countries=CO&hscod=2105>

SPS measures

All sanitary and Phytosanitary measures concerning the import of ice cream into Colombia are in line with international standards.

Up to date information on appropriate documents concerning SPS measures:

<https://madb.europa.eu/madb/datasetPreview/fpubli.htm?countries=CO&hscod=2105>

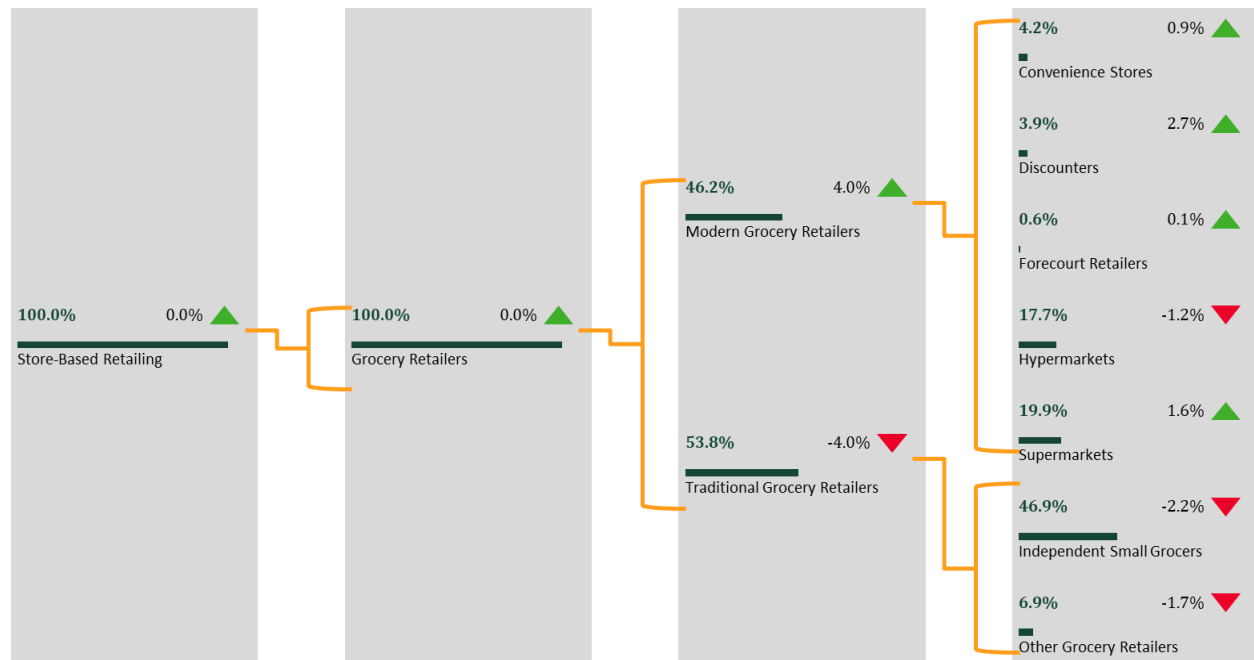
Labelling

As described in more detail in section 4.2.3, ice cream must comply with generic labelling rules, as provided for in Resolutions 5109/2005 and 1506/2011.

5.14.5 Distribution

As set out in Figure 5-69, all sales of “off-trade” packaged ice cream were completed through grocery retailers, in 2018. Traditional grocery retailers took the lead with nearly 54% of total sales; most of those were done through independent small grocers, in 2018. Amongst modern grocery retailers, supermarkets and hypermarkets stood out. However, discounters are rapidly growing in importance as a distribution channel for ice cream. Apart from all these outlets, there are over 200 000 ice cream shops in Colombia and about 20 000 *tilines* selling takeaway products.

Figure 5-69: Distribution channels of ice cream in Colombia (2018); retail value



Source: Euromonitor International: Packaged Food, 2019.

5.14.6 Challenges for EU products

The biggest challenge European producers should take into account is large domestic production as well as strong preference of Colombian consumers for unpackaged type of ice-cream, which is expected to grow. Secondly, as indicated in previous sections, Colombian imports are rather minor, hence the knowledge of European ice-cream might be relatively low.

Market Takeaway: Ice cream

Consumption: Consumption on rise, however particularly in the segment of unpackaged ice-cream.

Competition: Strong domestic production, imports rather minor in terms of volume.

Distribution: Ice-cream distributed in almost equal quantities through traditional and modern grocery retailers, discounters' shares on rise

Challenges: Consumers' preference for unpackaged type of ice-cream as well as dominance of Colombian manufacturers on the market.

Opportunities: Growing demand for ice-cream across all socioeconomic levels.

5.15 Fresh meat

5.15.1 SWOT analysis

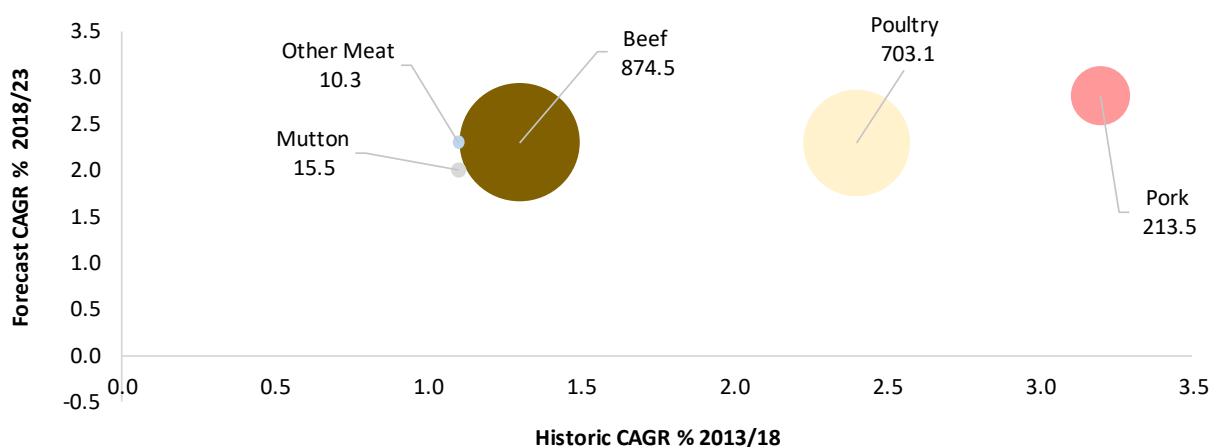
STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none"> Large market. Consumers' preference for various types of meat 	<ul style="list-style-type: none"> Complex framework related to market entry. Large domestic production, especially beef. Imports from the EU not significant in volume.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none"> Growing consumption of meat across all segments. 	<ul style="list-style-type: none"> Dominance of other exporters (mostly US) on the Colombian market.

5.15.2 Consumption

5.15.2.1 Evolution of consumption

Consumption of fresh meat in Colombia has been steadily growing and is expected to remain on the upward trend. As presented in Figure 5-70, beef, with an increase of 1.3% per year in years 2013-2018, is the largest segment. Poultry is the second biggest fresh meat segment in Colombia and increased by 2.4% per year in its market size. Both segments are projected to note a stable growth of 2.3% per year in the next years. Colombians consume much less pork, which is a third biggest segment, however, it noted the highest growth in years 2013-2018 as well as it is expected no record the highest growth over the forecast period. Mutton and other meat do not constitute a major market in Colombia.

Figure 5-70: Evolution and forecast of fresh meat market (000 tonnes) in Colombia, 2013-2023; total volume



Source: Euromonitor International: Fresh Food, 2019.

5.15.2.2 Consumer profile and purchase criteria

Consumers

Colombian consumers include meat in many of their traditional dishes and, in general terms, have preference for a meat-based diet. Both beef and poultry are widely used in a vast variety of dishes¹²⁰. Due to slowly progressing internationalisation and diversification of Colombian cuisine, consumption of other types of meat, such as pork is gaining popularity.

Drivers and method of consumption

There are several key drivers impacting the meat consumption and preferences in Colombia. The most influential driver has to do with Colombian cuisine tradition, which includes certain types of meat. More affluent consumers tend to base their method of consumption on novelty-seeking, which often includes less known combinations. In general, with abundance of Colombian restaurants/food service market, meat consumers have many opportunities to try variety of dishes with beef and/or poultry.

Purchase criteria

Like in other food sectors, price plays a crucial role when purchasing fresh meat. That said, it should be mentioned that Colombian consumers also pay great attention to the quality of fresh meat. Effectively, they prefer to purchase products through traditional retailers, often by-the-weight meat; meaning they favour local produce.

5.15.2.3 Recent market trends

As described in the section 5.15.3.1, fresh meat market in Colombia has been on rise and it is projected to stay on the upward trend. All segments are expected to note very similar CAGR growth oscillating between 2% to 2.8% per year in the incoming years. Beef and poultry are to remain the most popular fresh meat in Colombia, followed by pigmeat, which market size is predicted to grow the fastest.

5.15.3 Offer

5.15.3.1 Domestic production

Colombian production of fresh meat is substantial, especially in the bovine sector. Colombia has the fourth largest cattle herd in Latin America, with breeds and inventory creating great potential for exports. The cattle herds in Colombia are mostly concentrated in the departments of Antioquia, Córdoba, Casanare, Meta and Caquetá¹²¹. Colombian bovine meat industry can be characterized by favourable location and quality pastures throughout the year. Colombian beef is well perceived and known for its high quality.

¹²⁰ Traditional Colombian Food ; <https://www.medellincolombia.co/where-to-eat-in-medellin/traditional-colombian-food/>

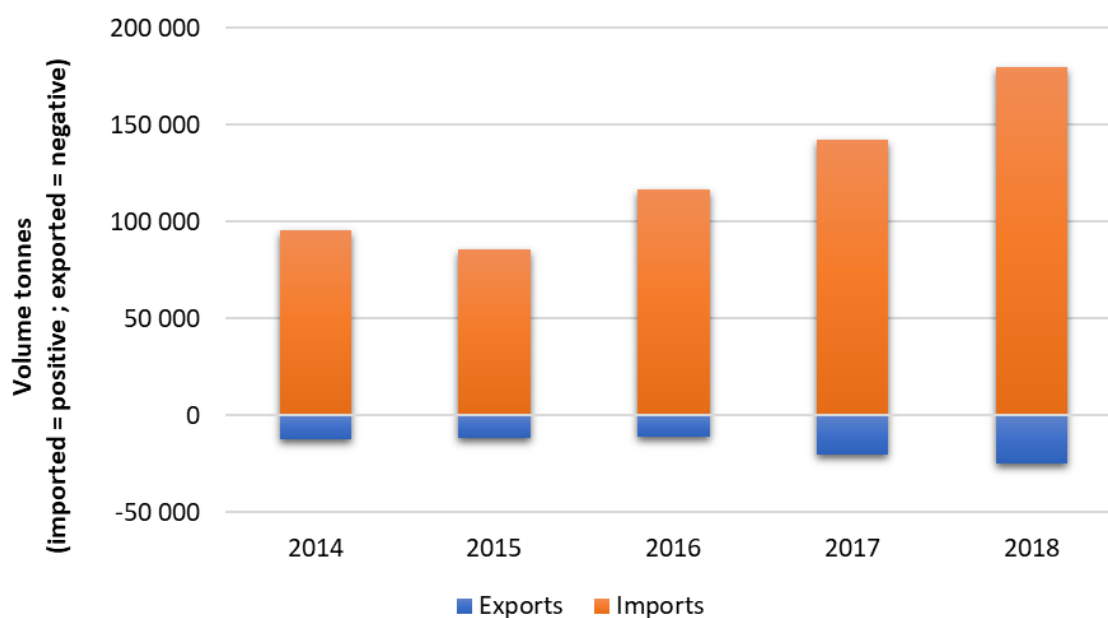
¹²¹ Inversión en el sector Cárnico en Colombia ; <https://www.inviertaencolombia.com.co/sectores/agroindustria/carnico.html>

The poultry industry has been continuously growing, noting a massive increase of 79% in production¹²² comparing 2010 and 2018 numbers. That said, since 2016 Colombian poultry sector has noted a slight contraction¹²³. Nevertheless, given the fact that stable and low costs of poultry drive demand¹²⁴, the poultry sector is said to continue growing.

5.15.3.2 Imports and exports

Colombian imported volumes of fresh meat have been heavily outweighing the exports, which constitute only the small part in the domestic import/export fresh meat market. Imports have been continuously increasing since 2016 and reached almost 180 000 tonnes in 2018. Like imported volumes, exports have been on rise and accounted for nearly 25 000 tonnes in 2018 (Figure 5-71).

Figure 5-71: Trade balance (imports and exports) of fresh meat in Colombia, 2014-2018; tonnes



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN code 0201, 0202, 0203, 0204, 0206, 0207.

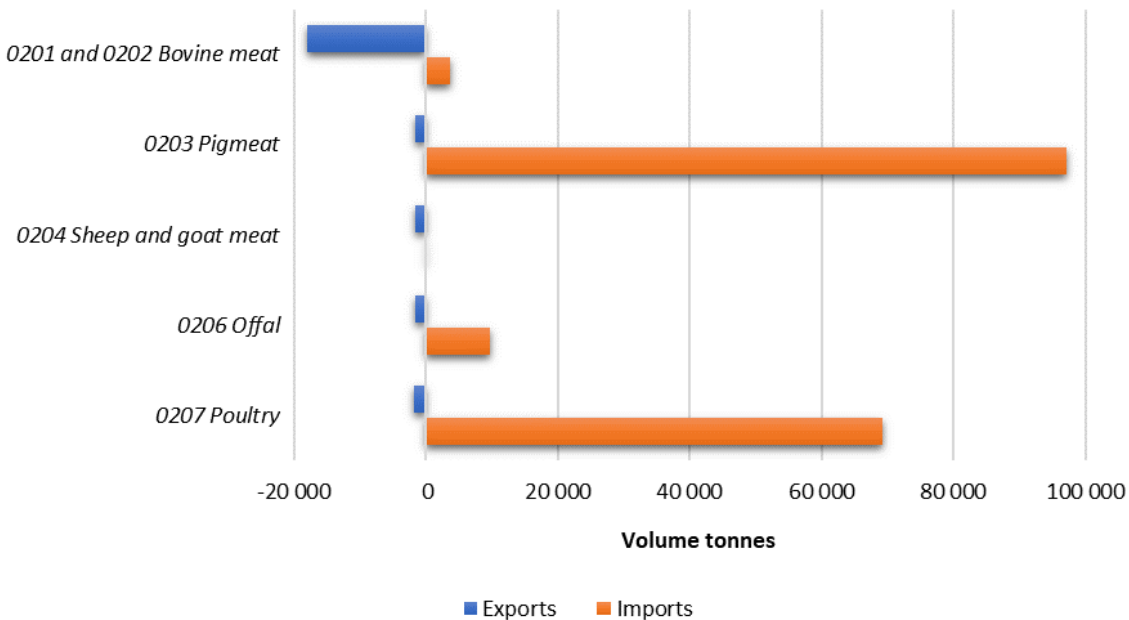
¹²² In terms of value

¹²³ LA PRODUCCIÓN Y CONSUMO AVÍCOLA EN COLOMBIA SE DISPARAN ; <https://avicultura.com/la-produccion-y-consumo-avicola-en-colombia-se-disparan/>

¹²⁴ El pollo y el huevo van ganando la guerra de la proteína ; <https://www.dinero.com/pais/articulo/aumenta-la-produccion-y-consumo-de-pollo-y-huevo/266218>

As Figure 5-72 shows, pigmeat is the most common imported fresh meat in Colombia, reaching nearly 100 000 tonnes in 2018, followed by poultry, which import volume is almost 70 000. On the other hand, Colombian most notable exports apply to bovine meat, which in 2018 reached almost 20 000 tonnes.

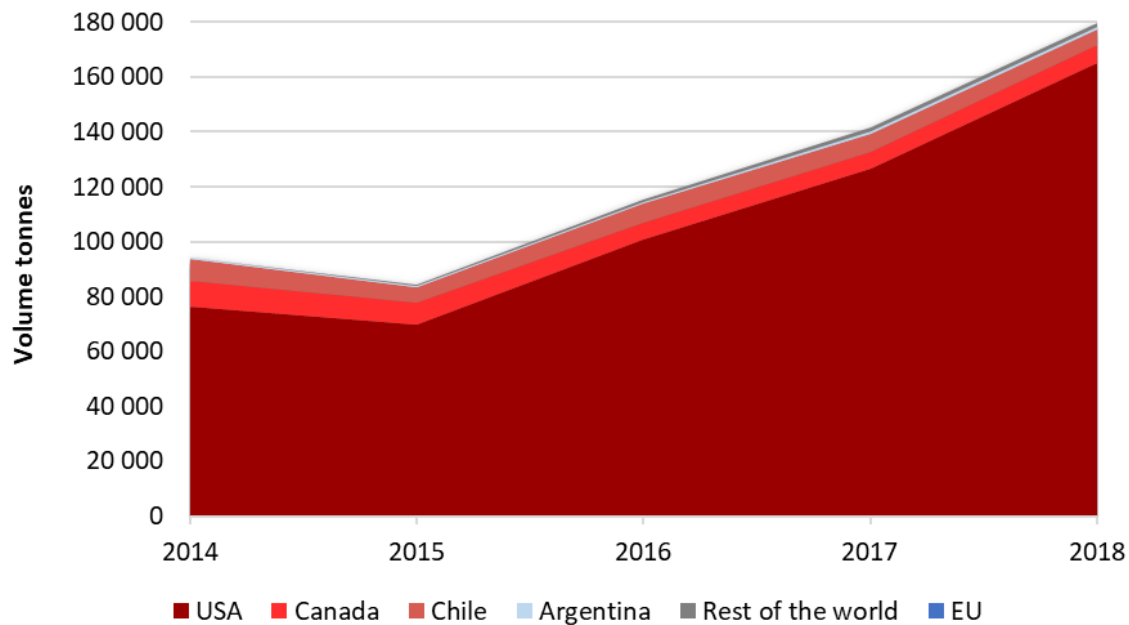
Figure 5-72: Trade balance (imports and exports) of fresh meat in Colombia, by type, 2018; tonnes



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>
Data for CN code 0201, 0202, 0203, 0204, 0206, 0207.

Colombia imports fresh meat almost exclusively from USA, with minor involvement of other exporters from Canada and Chile. EU imports of fresh meat are very marginal and years 2014-2018 did not bring any significant fluctuations in importers' shares.

Figure 5-73: Colombian imports of fresh meat by country, 2014-18; tonnes



Source: Trade Map, International Trade Centre - <https://www.trademap.org/>

Data for CN code 0201, 0202, 0203, 0204, 0206, 0207.

5.15.3.3 EU GI products

As reported in section 9, under the EU-Colombia and Peru Trade Agreement, several products are recognised as Geographical Indications in Colombia, however the list do not include any fresh meat products.

5.15.3.4 Main competitors

As outlined in section 5.15.3.1, domestic production in Colombia is substantial, securing self-sufficiency in the case of the beef sector. Moreover, capacity of Colombian poultry producers has been on gradual increase. Furthermore, as seen in section 5.15.3.2, Colombian imports usually apply to pigmeat and poultry and are largely dominated by US producers.

5.15.4 Specific market entry requirements

Market Access and Entry

As described in section 4.2.1, European producers should register their products with the INVIMA and MINICOMEX¹²⁵. Furthermore, products must comply with the Law 9 of 1979 on imports of food products,

¹²⁵ In accordance with Decree 3075/1977, the following products are not subject to registration: (a) non-transformed chilled and frozen animal-origin food products, (b) non-transformed natural food products, and (c) raw materials for food preparation.

(see section 4.2.2). Producers should be also mindful of other necessary documentation (detailed Table 4-2), such as:

- Authorisation of foreign foodstuffs producers,
- Certificate of analysis,
- Preliminary import licence,
- Preliminary Import registration,
- Sanitary registration of foodstuffs,
- Veterinary health certificate for animal products,
- Zoosanitary import permit.

Furthermore, it should be noted that certain types of European fresh meat face additional challenges, mainly linked to disease outbreaks, such as African Swine Fever (ASF). The main issue here is lack of recognition of regionalisation which, in effect, hinders access of pigmeat from the EU. In addition, the process of granting the market entry is rather complex and stringent. That said, the process of introducing the facilitating measures in this aspect is being discussed with Colombian authorities.

Detailed information on import duties and Rules of Origin can be consulted on the European Commission website:

https://madb.europa.eu/madb/datasetPreviewFormATpubli.htm?datacat_id=AT&from=publi&hscode=0402&countryid=CO

Customs procedures

A list of standard documents required for imported fresh meat in Colombia is presented in section 4.2.1

Any other up to date information on appropriate documents concerning customs procedures can be consulted on European Commission website:

https://madb.europa.eu/madb/datasetPreviewFormATpubli.htm?datacat_id=AT&from=publi&hscode=0402&countryid=CO

SPS measures

All sanitary and Phytosanitary measures concerning the import of are in line with international standards. It should be pointed out though that additional documentation might be required (as per Table 4-2).

Up to date information on appropriate documents concerning SPS measures:

https://madb.europa.eu/madb/datasetPreviewFormATpubli.htm?datacat_id=AT&from=publi&hscode=0402&countryid=CO

Labelling

As described in more detail in section 4.2.3, all imported dairy products must be labelled in line with:

- Regulation in terms of labels or labels requirements (Resolution 5109 of 2005).

- Requirements for labelling or labels regarding additives (Resolution 1506 of 2011).

5.15.5 Distribution

Colombian consumers tend to choose traditional distribution channels for their fresh meat purchases. It should be also remembered that foodservice constitutes large share when it comes to distribution channel.

5.15.6 Challenges for EU products

EU producers might find challenging entering the Colombian market, as the domestic production is significant. The beef sector is self-sufficient, and the poultry sector has been on very rapid growth in terms of its production capacity. Moreover, any shortages in fresh meat volumes, mostly pigmeat and poultry, are filled by US producers, which are major exporters of fresh meat to Colombia. Lastly, due to the fact that EU exports are very low – largely limited by the restrictions on pigmeat trade - the level of knowledge about EU products is poor.

Market Takeaway: Fresh meat

Consumption: Consumption of fresh meat has been on rise and it is projected to remain on the upward trend in the next years.

Competition: Market relies both on domestic production as well as imports, especially from USA

Distribution: Fresh meat is being distributed through traditional channels as well as foodservice.

Challenges: Lack of European imports and lack of knowledge on European products. Stringent controls and legislative framework connected to disease outbreaks.

Opportunities: Increasing consumption of fresh meat across the segments.

6 Communication

6.1 Communication strategy

Penetrating the Colombian market with new products usually requires an extensive communication campaign. Companies' marketing strategies frequently include a combination of traditional media, such as radio, television, newspapers, and new media, namely social networks/platforms.

This section is therefore aimed at introducing the main communication channels (new and traditional media, as well as fairs) available in Colombia, as well as key regulations for the advertisement of F&B.

6.1.1 Online & Digital Media

Although traditional media continue to dominate the Colombian media landscape, Internet has been gaining ground and it is more and more common to observe that the main newspapers, television and radio are consumed online¹²⁶.

In Colombia, over 70% of the population owns a smartphone and around **63% of the population have access to the internet**. Among active users, social media platforms such as **Facebook, Whatsapp, Youtube, Instagram and Twitter** are the **most popular**. Currently, 59% of Colombians access social networks and platforms at least 10 times a day¹²⁷.

Social media platforms provide several opportunities for brand marketing in the Colombian market. However, in order to plan and implement a successful advertising strategy through social media, it is important to understand the different platforms and how they are used by target customers. Digital advertising agencies (see box below) may provide companies with support to develop a successful digital marketing strategy.

Colombian Main Digital Advertising Agencies:

ON Digital, <https://ondigital.co/>

Reinv3nt, www.reinventpublicidad.com

Ketchum, www.ketchum.com

DDB Colombia, www.ddbcol.com.co

Ariadna, www.ariadnacommunicationsgroup.com

Grupo Sancho, www.sanchobbdo.com.co

Young&Rubicam Group, www.yrindochina.com

Digital marketing in Colombia has recorded a considerable increase, hence changing the traditional marketing mix, with internet becoming a core part of companies' communication strategy. Indeed, digital advertising has been growing at of the fastest rates in the region, with only Peru predicted to have a faster

¹²⁶ Media Landscapes: Colombia, <https://medialandscapes.org/country/colombia>

¹²⁷ Media Landscapes: Colombia, <https://medialandscapes.org/country/colombia>

rate of growth. In 2019, advertisers are indeed expected to spend nearly EUR 260 million on online advertising, accounting for 17% of total ad spend¹²⁸.

Internet advertising has proved successful for several companies, in terms of enhancing brand awareness and online brand presence, as well as penetrating a specific target market. The way online and social medias can be used in Colombia for marketing purposes is further analysed in the sections below.

6.1.1.1 Social media platforms

Social media marketing is growing in importance in Colombia, considering that:

- Approximately 34 million people actively use social media, a figure that is on a constant growth;
- 88% of the population uses the internet every day;
- On average, Colombians spend 3 hours and a half a day on social media;
- The average Colombian consumer looks for information on social media for every purchase they make.¹²⁹¹³⁰

Facebook, YouTube and Instagram

With over **30.3 million users**, **Facebook is the most popular social medium** in Colombia. Colombia ranks number 14 worldwide for number of users on Facebook; Bogotá is the ninth city in the world by Facebook users, with about 6.5 million profiles. Of all active users, around 10 million are people aged 25 to 34 and 51% are women. Women are also the most likely to click on Facebook ads.

With nearly **22 million users**, **YouTube** is the second most popular social media platform. **Instagram** follows, with nearly **11 million users**. Instagram is the fastest growing social network, with over **7 million users focus on food and beverages**. Around 57% of total Instagram users are women, while people aged 25 to 34 account for nearly 4 million users¹³¹¹³².

Tips to advertise products on social networks and video platforms

- Custom account/page: One way to enhance brand awareness on social networks is to create an account/page specifically for the Colombian market, and post content in Spanish. Instagram and Youtube are particularly useful to highlight the visual identity of the brand, while Facebook and Twitter accounts enable interaction with the consumers including keeping them up to date with companies' news. A successful post on these social networks can increase traffic to the company's

¹²⁸ Digital Advertising Spend Growing In Colombia; <https://webcertain.com/site/knowhowAmp/Digital-Advertising-Spend-Growing-In-Colombia/kb1153>

¹²⁹ We Are Social & Hootsuite: Digital 2019 – Colombia; <https://fr.slideshare.net/DataReportal/digital-2019-colombia-january-2019-v01>

¹³⁰ Social media influence: Qualitative study of Colombian consumer attitude toward social media and its influence; <http://www.diva-portal.org/smash/record.jsf?pid=diva2%3A1112915&dswid=8800>

¹³¹ Facebook & Instagram users in Colombia 2019; <https://napoleoncat.com/blog/social-media-users-in-colombia/>

¹³² Export.gov: Colombia – eCommerce; <https://www.export.gov/article?id=Colombia-eCommerce>

website. In this respect, understanding the target consumers and what best gain their attention is crucial.

- **Paid advertising:** Facebook and Instagram allow one to start a paid campaign, which can be personalised according to the final goal (e.g. attract new followers, send traffic to the website), the audience, and the budget. The audience can be selected on the basis of several criteria e.g. location, gender, interests etc.
- **Influencers:** working with an influencer is key to enhancing brand awareness and penetrating a specific target audience. Through native speaking celebrities the brand can indeed connect more personally with target users. Furthermore, influencers' advertising ensures more exposure through spreading the brand among their followers. Influencers can be remunerated with a fee, or (mostly micro-influencers) with an exclusive experience (e.g. a discount), and/or recognition (e.g. share their posts on the company's social media accounts).

6.1.1.2 Food blogs

Another successful strategy to promote a product in Colombia is to work with food bloggers to write a promotional post on their blog. The tips indicated in section 6.1.1.1 are valuable also with regards to food blogs. Popular food bloggers are also influencers who often cross over between written blogs and social media platforms; therefore, working with them often means the opportunity to expose the brands on several platforms.

6.1.2 Traditional Media

Traditional media play a prevailing role in the daily life of the average citizen of Colombia. At the beginning of the last century the habitual consumption was of national and regional traditional printed newspapers; as of today, the consumption of electronic media (television and radio) in digital form either from mobile phones, computers or tablets has become the norm.

Penetration of traditional media in Colombia is set out below:

- **Television:** with an average consumption of 4 hours per day, television is Colombians' favourite media channel. Almost all families have at least one TV and the public signal reaches 92% of the whole country. Two private channels (Caracol and RCN) dispute the popularity with 80% of the national audience.
- **Print media:** 55% of the population over 12 years of age read newspapers, with most of them aged 25 and 65 years. Newspapers are read several times a week by nearly 38% of the people, followed by a rough 28% who reads it daily.
- **Radio:** the second most consumed media after television, radio has also the highest reach, as 48.3 million of Colombians, i.e. about 80% of the population uses it.¹³³

¹³³ Media Landscapes: Colombia, <https://medialandscapes.org/country/colombia>

6.1.3 Fairs and exhibitions

In addition to the digital approach, some companies decide to advertise their products on various trade fairs, which presence on the Colombian market is still limited but on the rise. Exhibitions constitute a promising opportunity to develop better brand recognition and initiate market interest. However, as some exhibitions might only reach local audience, it is advisable to research the exhibition's profile in advance. On the other hand, some of them might create synergies when accompanied by an online presence. It is also worth remembering that participation costs are usually directly proportional to the rank of the exhibition and its scope.

A list of upcoming exhibitions is included in section 8.3. Updated lists may be found online on websites such as:

- www.neventum.com/tradeshows/food/colombia
- 10times.com/colombia/food-beverage
- www.tradefairdates.com/Fairs-Colombia-Z48-S1.html
- www.eventseye.com/fairs/c1_trade-shows_colombia.html
- www.ntradeshows.com/food/colombia

6.2 Advertising regulations

In Colombia, advertisements of food and beverages must comply with [Law 1480 of 2011](#) (the Consumer Protection Statute), which introduced mandatory guidelines regarding accuracy and truthfulness of advertisements. Under the Statute, **misleading advertising is forbidden**. The body responsible for ensuring compliance with advertising rules is the Superintendence of Industry and Commerce (SIC).

Certain behaviours involving advertising may be deemed as unfair competition under Law 260 of 1996 (the Unfair Competition Law), for example, misleading comparative advertising and certain conducts related to ambush marketing.

The following restrictions apply to the advertising of certain food and beverage products:

- **Alcoholic beverages** are subject to restrictions on advertising hours and types of advertisement, and special conditions to carry out the advertisement, such as the inclusion of mandatory phrases.
- **Infant formula** cannot be subject to promotions or rebates.

Food advertising must meet the following requirements:

- It must comply with sanitary standards;
- It must fulfil the conditions in which the sanitary registration was granted;
- It must ensure that information does not mislead consumers by statements or omissions;
- The information contained in the advertising should not be contrary to the promotion of healthy habits;
- There should not be claims regarding medicinal, preventive, curative, nutritional or special properties that could lead to misperceptions about its true nature, origin, composition or quality;

- It must clearly indicate the natural or synthetic origin of the basic raw materials used in food processing; and
- The advertisement cannot suggest that the food alone fills the nutritional requirements of the individual or imply that the product has properties that replace a balanced diet or provide all nutrients.

On top of that, a draft bill regulating the advertising of sweetened food and drinks, especially to minors, is in place¹³⁴.

¹³⁴ Lexology: Advertising & Marketing in Colombia; <https://www.lexology.com/library/detail.aspx?g=2cf7f902-395f-472c-9318-03b7a7d6a86e>

7 Colombian Etiquette

7.1 Quick facts

- Colombia’s business culture varies across the country. In large cities (in particular Bogotá and Medellín) the business culture is rather formal, while in smaller cities, the culture tends to be more informal.
- Titles are important and it is recommended to use terms like “Doctor” as a form of respect, when addressing anyone with a degree.
- When meeting, a firm handshake, combined with strong eye contact and a smile make the best first impression. Kissing women on their right cheek is acceptable once you have met her several times; shaking hands is considered more respectful when firstly meeting.
- Colombians like to know that visitors have a positive impression of their country.
- On departure the handshaking and kissing will be repeated.
- Conservative dress code is recommended for all meetings in Bogotá and Medellín. Smart casual dress may be acceptable, or even desirable, in smaller cities, especially those in more tropical climates.
- Business meetings must be arranged at other times than Christmas/New Year and Easter week, when Colombians usually take holidays.
- It is advisable to engage a local interpreter for a first meeting with a potential partner.

7.2 Key DOs and DON'Ts



- Be on time at meetings.*
- Be formally dressed in large cities.*
- Use titles.*
- Use firm handshakes and eye-contact.*
- Engage an interpreter for a first meeting.*
- Engage in talks about Colombia.*



- Forget your business cards.*
- Be too formal in small cities.*
- Kiss women on the cheek when meeting them for the first time.*
- Arrange meetings during Christmas/New Year and Easter periods.*



8 Directory of Trade Support Projects, Organisations, and Service Providers

There are a variety of services available, both within the EU and in Colombia, for producers wishing to export to Colombia. These service providers include EU funded projects, services provided by Member States and their embassies, other organisations and service providers, as well as buyers, importers and distributors.

- Section 8.1 contains the project profiles for EU funded initiatives operating in Colombia.
- Section 8.2 contains the contact information for Member State embassies within Colombia. Section 8.3 contains a listing of service providers including some information on the services available.
- Section 8.4 provides a calendar of exhibitions, trade shows, and other events to be held in Colombia in 2019-20.
- Section 8.5 contains a database of professionals' contacts (buyers, importers and distributors).

8.1 European Union Organisations

Certain EU funded, or co-funded, projects within Colombia offer a range of business facilitation services and information providing important insights into the Colombian market. Depending on your company profile these services can be free or fee based; and are available for companies from any EU Member State.

LATIN AMERICA IPR SME HELPDESK

































The [Latin America IPR SME Helpdesk](#) facilitates the expansion of the European Small and Medium-Sized Enterprises (SMEs) which are interested in or already operating in Latin America, through increased know-how of the usage and enforcement of the Intellectual Property (IP) rights system. Accessible services are free of charge, user-friendly, first-line personalised and confidential advice on IP and related issues, plus factsheets, training, and online resources.



EUROCAMARAS, the [Association of European Chambers in Colombia](#) (*Asociación de las Cámaras Europeas en Colombia*) is an association of European companies operating in or related to Colombia. EUROCAMARAS is dedicated, since 1998, to the strengthening and joint promotion of trade between Colombia and the EU Member States and Switzerland. It consists of seven binational cameras, involving the France, Germany, Italy, the Netherlands, Spain and the United Kingdom.

8.2 Directory of EU Member State Embassies/Consulates

EU MS	Address	Contact information
Austria (Embassy)	Cr. 9 No. 73-44, Oficina 402 110221 Bogotá, Colombia	☎ (+57) (1) 745 2086 / 8189 ; (+57) (1) 744 3418 ✉ bogota-ob@bmeia.gov.at 💻 www.bmeia.gov.at/oeb-bogota
Belgium (Embassy)	Calle 92 No 11-51, Oficina 503 110221 Bogotá, Colombia	☎ (+57) 1 744 9553 ✉ bogota@diplobel.fed.be 💻 www.diplomatie.belgium.be/colombia
Bulgaria (Honorary Consulate)	Calle 70 A No. 4-41, Bogotá, Colombia	☎ (+57) 1 346 2011 ✉ cumana@brigardurrutia.com.co ; glujan@bu.com.co
Croatia (Honorary Consulate)	Carrera 8A# 107A-35, Bogotá, Colombia	☎ (+57) 1 612 8785 ✉ consulhonorariocroacia.bogota@gmail.com
Cyprus (Honorary Consulate)	Carrera 6, No. 86-57, Apartamento 702 Bogotá D.C., Colombia	☎ (+57) 1 621 0227 ; (+57) 320 835 1375 ✉ e.eliades@yahoo.com
Czechia (Embassy)	Edificio AB Proyectos, Calle 98 No. 9A- 41, Oficina 602, Bogotá DC, Colombia	☎ (+57) 1 742 9142 ✉ bogota@embassy.mzv.cz 💻 www.mzv.cz/bogota
Denmark (Embassy)	Carrera 13 # 93-40, Bogotá DC, Colombia	☎ (+57) (1) 746 8016 ✉ bogamb@um.dk 💻 colombia.um.dk
Estonia	<i>Embassy of Poland in Bogotá is concurrent to Estonia</i>	
Finland (Embassy)	Calle 116 # 7-15, Piso 12, 110111 Bogotá, Colombia	☎ (+57) 1 744 7176 ✉ sanomat.bog@formin.fi 💻 colombia.finland.fi
France (Embassy)	Carrera 11, 93-12 apartado aéreo 29611 Bogotá, Colombia	☎ (+57) 1 638 1400 💻 co.ambafrance.org
Germany (Embassy)	Edificio Torre Empresarial Pacífica, P.H. Calle 110 No. 9-25, piso 11 Bogotá, D. C. Colombia	☎ (+57) 1 423 2600 ✉ info@bogota.diplo.de 💻 www.bogota.diplo.de
Greece (Honorary Consulate)	Carrera 13 No. 75 – 20, Santa Fe de Bogotá D.C., Colombia	☎ (+57) 1 211 3576 ✉ consuladodegrecia@telmex.net.co
Hungary (Embassy)	Carrera 7 #75-51, Edificio Terpel, Oficina 301, Bogotá, Colombia	☎ (+57) 1 541 8465 ✉ mission.bog@mfa.gov.hu 💻 bogota.mfa.gov.hu
Ireland (Embassy)	Piso 12, Edificio Cusezar, Calle 116 #7- 15, Bogotá D.C., Colombia	☎ (+57) (1) 743 6342 ; (+57) (0) 31 743 6342 ✉ bogotaemexternalmail@dfa.ie

EU MS	Address	Contact information
		 www.dfa.ie/colombia
Italy (Embassy)	Calle 93 B, n. 9-92, Bogotá, Colombia	 (+57) 1 2187 206 ; (+57) 1 2941 512  ambbogo.mail@esteri.it  ambbogota.esteri.it/ambasciata_bogota/it/
Latvia (Honorary Consulate)	Calle 120 No. 11B-30 (505), Bogotá, Colombia	 (+57) 300 563 0779  consuladoletonia@gmail.com
Lithuania (Honorary Consulate)	Calle 125 N° 16-07, Santa Barbara, Bogotá, Colombia	 (+57) 805 0168 ; (+57) 350 460 4279 (mobile)  consulituania@outlook.com
Luxembourg	<i>Embassy of the Netherlands in Bogotá is concurrent to Luxembourg</i>	
Malta (Honorary Consulate)	Carrera 6 # 151 – 18, 801, Bogotá Colombia	 (+57) 1 668 5370  maltaconsul.bogota@gov.mt
Netherlands (Embassy)	Carrera 13, No. 93-40, 5th floor Bogotá, Colombia	 (+57) 1 638 4200  bog@minbuza.nl  www.paisesbajosytu.nl/su-pais-y-los-paises-bajos/colombia
Poland (Embassy)	Carrera 21 bis No 104A-15, Bogotá, Colombia	 (+57) 1 214 0400 ; (+57) 320 488 0275  bogota.amb.sekretariat@msz.gov.pl ; bog.amb.wk@msz.gov.pl  www.bogota.msz.gov.pl
Portugal (Embassy)	Edificio Advance, Calle 99 # 7A - 77 Oficina 507, Bogotá, Colombia	 (+57) 1 307 2990  bogota@mne.pt  www.bogota.embaixadaportugal.mne.pt
Romania (Embassy)	Carrera 7, no. 92-58, Bogotá, Colombia	 (+57) 1 256 6438 ; (+57) 1 256 6719  ambrombogota@outlook.com  bogota.mae.ro
Slovakia (Honorary Consulate)	Edificio Julio Ospina Caribe Carrera 64 No. 72-64 piso 4, Medellín, Colombia	 (+57) 4 445 5555 ext. 4415, 4201  coneslovaquia@une.net.co
Slovenia (Embassy in Brazil is responsible for Colombia)	SHIS - QL 8 - Conjunto 8 - Casa 7 - Lago Sul CEP: 71620-285 Brasília / Distrito Federal, Brazil	 (+55) 61 3365 1445  sloembassy.brasilia@gov.si
Spain (Embassy)	Calle 92, n.º 12-68, Apartado Aéreo: 90355, 12-68.-Bogotá, Colombia	 (+57) 1 622 00 90  emb.bogota@maec.es  www.exteriores.gob.es/Embajadas/Bogota
Sweden (Embassy)	Calle 72 No. 5-83, piso 8, Edificio Avenida de Chile, Apartado Aéreo 52966, Bogotá D.C., Colombia	 (+57) 1 325 61 00  ambassaden.bogota@gov.se  www.swedenabroad.com/bogota

EU MS	Address	Contact information
United Kingdom (Embassy)	Carrera 9, No 76 - 49, Floor 8, Edificio ING Barings, Bogotá, Colombia	 (+57) 1 326 8300  embajadabritanica.bogota@fco.gov.uk  www.gov.uk/government/world/colombia

8.3 Other organisations and service providers

Service provider	Address	Contact information
SERVICES FOR AUSTRIAN COMPANIES		
Advantage Austria in Bogotá	Oficina Comercial Av. Calle 82 No. 10-33, Oficina 403, Bogotá, Colombia	 (+57) 1 321 5455  bogota@advantageaustria.org  www.advantageaustria.org/co
SERVICES FOR BELGIAN COMPANIES		
Belgo-Luxembourg-Colombian Chamber of Commerce	<i>Not available</i>	 (+32) 0 473 784 882  info@belcol-cc.com ; daniel.jordan@skynet.be  www.belcol-cc.com
Flanders Investment & Trade in Bogotá	Calle 92 No 11 – 51 Oficina 503 Bogotá, Colombia	 (+57) 1 744 9554  bogota@awex-wallonia.com  www.flandersinvestmentandtrade.com/en/contact/foreign-offices/colombia
Wallonia Export & Investment in Bogotá	Calle 92 No 11 – 51 Oficina 503, Bogotá, Colombia	 (+57) 1 328 7170  bogota@awex-wallonia.com ; m.inghels@awex-wallonia.com  www.awex-export.be/fr/marches-et-secteurs/colombie
SERVICES FOR BRITISH COMPANIES		
The Colombian-British Chamber of Commerce	Calle 104 No. 14 A-45 Office 301. Bogotá, Colombia	 (+57) 1 256 2833  comunicaciones@colombobritanica.com  colombobritanica.com
British & Colombian Chamber of Commerce	Mappin House, 4 Winsley Street London, W1W 8HF, United Kingdom	 +44 (0) 207 235 2106  info@britishandcolombianchamber.com  britishandcolombianchamber.com
UK Colombia Trade	Carrera 9 No. 76-49 Piso 9, Bogota, Colombia	 (+57) 1 326 8237  info@ukcolombiatrader.com  ukcolombiatrader.com
SERVICES FOR BULGARIAN COMPANIES		
Bulgarian Chamber of Commerce & Industry	17, Adriana Budevskia Str. Sofia 1463, Bulgaria	 (+359 2) 8117 400 ; 987 26 31  bcci@bccibg.com  www.bcci.bg
SERVICES FOR CROATIAN COMPANIES		

Service provider	Address	Contact information
Croatian Chamber of Economy	Rooseveltovej trg 2, 10000 Zagreb, Croatia	✉ investicije@hgk.hr; hgk@hgk.hr 🌐 www.investincroatia.hr
SERVICES FOR CZECH COMPANIES		
Czech Trade in Bogotá	Calle 98 No.9A-41 oficina 602, Edificio AB Proyectos, Bogotá, Colombia	☎ (+57) 1 311 289 65 98, 742 91 42 ✉ barbora.kapralova@czechtrade.cz 🌐 www.czechtradeoffices.com/es/co
SERVICES FOR CYPRIOT COMPANIES		
Cyprus Chamber of Commerce and Industry	38, Grivas Dhigenis Ave. & 3, Deligiorgis Str., P.O.Box 21455, 1509 Nicosia	☎ +357 22889800 ✉ chamber@ccci.org.cy
SERVICES FOR DANISH COMPANIES		
Danish Chamber of Commerce	Dansk Erhverv, Børsen, DK-1217 Copenhagen K	☎ +61 8 9848 2065 ✉ info@danskerhverv.dk 🌐 www.danskerhverv.dk
SERVICES FOR DUTCH COMPANIES		
Colombian-Dutch Chamber of Commerce	Calle 90 No 19, 41 Oficina 801 Edificio Quantum. Bogotá, Colombia	☎ (+57) 1 744 9566 ✉ gerencia@hollandhouse-colombia.com 🌐 www.hollandhouse-colombia.com
SERVICES FOR ESTONIAN COMPANIES		
Estonian Chamber of Commerce & Industry	Toom-Kooli 17, 10130 Tallinn	☎ +372 604 0060 ✉ koda@koda.ee
SERVICES FOR FINNISH COMPANIES		
Nordic Chamber of Commerce in Colombia	Calle 72 No.5-83 of. 901, Bogotá, Colombia	☎ (+57) 1 345 2721 ✉ cccn@cable.net.co 🌐 www.camaracolombonordica.com
SERVICES FOR FRENCH COMPANIES		
French-Colombian Chamber of Commerce & Industry	Carrera 13 N° 94 A – 25, Oficina 412, 315 800 62 98, Bogotá, Colombia	☎ (+57) 1 622 4362 ; (+57) 1 745 2181 ✉ ccifc@france-colombia.com 🌐 www.france-colombia.com
Business France in Bogotá	Carrera 11 N° 93 -12 – Cuarto piso, 110221, Bogotá, Colombia	☎ (+57) 1 638 1470 🌐 www.businessfrance.fr
SERVICES FOR GERMAN COMPANIES		
German-Colombian Chamber of Industry & Commerce	Carrera 13 No. 93 - 40, piso 4, Bogotá, Colombia	☎ (+57) 1 651 3777 ✉ info@ahk-colombia.com 🌐 kolumbien.ahk.de
SERVICES FOR GREEK COMPANIES		
Enterprise Greece – Invest & Trade	109 Vasilissis Sophias Avenue, 115 21 Athens, Greece	Tel: +30 210 335 5700 Email: info@enterprisegreece.gov.gr
SERVICES FOR HUNGARIAN COMPANIES		

Service provider	Address	Contact information
Hungarian Export Promotion Agency	1095 Budapest, Ipar utca 5	☎ 06 1 810 1600 ✉ info@hepa.hu 💻 hepa.hu
SERVICES FOR IRISH COMPANIES		
Latin America.ie	<i>Not available</i>	✉ business@latinamerica.ie 💻 www.latinamerica.ie
SERVICES FOR ITALIAN COMPANIES		
Italian Chamber of Commerce in Colombia	Cra 12A # 77A - 52 Bogotá Edificio Montreal Center - Ufficio 703	☎ (+57) 1 310 7524 ✉ contacto@ccicolombia.com 💻 italiano.ccicolombia.com
Italian Trade & Investment Agency in Bogotá	Calle 93b 9-92, Bogotá, Colombia	☎ (+57) 1 703 0410 ✉ bogota@ice.it 💻 www.ice.it/it/mercati/colombia/bogota
Italian Association for the Italian-Caribbean Trade	Viale Strasburgo 10/12 - 35030 Rubano (PD), Italia	☎ (+39) 049 859 1734 ✉ associazione@italia-caraibi.org 💻 www.italia-caraibi.org
SERVICES FOR LATVIAN COMPANIES		
Latvian Chamber of commerce and industry	35 Krisjana Valdemara str., Riga, LV-1010, Latvia	☎ +371 67225592 ✉ info@chamber.lv
SERVICES FOR LITHUANIAN COMPANIES		
Association of Lithuanian Chambers of Commerce, Industry and Crafts	Vašingtono a. 1-63A, LT-01108 Vilnius	☎ +370 5 261 21 02 ✉ info@chambers.lt
SERVICES FOR LUXEMBURG COMPANIES		
Belgo-Luxembourg-Colombian Chamber of Commerce	<i>Not available</i>	☎ (+32) 0 473 784 882 ✉ info@belcol-cc.com ; daniel.jordan@skynet.be 💻 www.belcol-cc.com
SERVICES FOR MALTESE COMPANIES		
The Malta Chamber of Commerce, Enterprise and Industry	64, Republic Street, Valletta, Malta	<i>Not available</i>
SERVICES FOR POLISH COMPANIES		
Polish Investment & Trade Agency in Bogotá	<i>Not available</i>	☎ (+57) 1 9 25 83 912 ✉ dorota.siry@paih.gov.pl 💻 paih.gov.pl/foreign_trade_office_bogota#
SERVICES FOR PORTUGUESE COMPANIES		
Portuguese-Colombian Chamber of Commerce	Calle 72 No. 5 – 83, Piso 5, Bogotá D.C., Colombia	✉ rosariomarques@portugalcolombia.com ; geral@portugalcolombia.com 💻 portugalcolombia.com

Service provider	Address	Contact information
AICEP Portugal Global in Colombia	Edificio Advance Cl.99, #7A-77, Of.507, Bogotá, Colombia	☎ (+57) 1 307 29 90 Ext. 805 ✉ antonio.aroso@portugalglobal.pt 🌐 www.portugalglobal.pt/EN/about-us/overseas-network/Pages/ARedeAicep.aspx?idPontoRe de=57
SERVICES FOR ROMANIAN COMPANIES		
Romanian-Colombia Bilateral Chamber of Commerce	Str. Vasile Alecsandri, nr. 7, cod postal 600008, Bacau, Romania	☎ 0234 537 491 ✉ office@crcc.ro 🌐 crcc.ro
SERVICES FOR SLOVAK COMPANIES		
Slovak Chamber of Commerce & Industry	Gorkého 9, 81603 Bratislava, Slovakia	☎ +421 2 54433272
SERVICES FOR SLOVENIAN COMPANIES		
Chamber of Commerce and Industry of Slovenia	Dimičeva 13, SI-1504 Ljubljana	☎ + 386 1 5898 000 ✉ info@gzs.si
SERVICES FOR SPANISH COMPANIES		
Hispanic-Colombian Chamber of Commerce	Calle 90 # 18-16, Bogotá, Colombia	☎ (+57) 1 742 8800 ✉ contacto@camaco.es.com.co 🌐 camaco.es.com.co
Catalonia Trade & Investment in Bogotá	Cra. 11a #94-56, Oficina 501, Centro Ejecutivo 95, Bogotá, Colombia	☎ (+57) 1 749 5678 🌐 catalonia.com/offices/bogota.jsp
SERVICES FOR SWEDISH COMPANIES		
Nordic Chamber of Commerce in Colombia	Calle 72 No.5-83 of. 901, Bogotá, Colombia	☎ (+57) 1 345 2721 ✉ cccn@cable.net.co 🌐 www.camaracolombonordica.com
Swedish-Colombian Chamber of Commerce	Swedish-Colombian Handelskammaren (CCCS) Box 55922, SE- 10216 Stockholm, Sweden	✉ info@svenskcolombianska.com 🌐 www.swedishchambers.se/www.svenskcolombianska.com
Business Sweden in Colombia	Calle 71 no 6-21 Oficina 501, Edif. La Ceiba, Bogotá D.C, Colombia	☎ (+57) 1 7346040 🌐 www.business-sweden.se/Export/marknader/amerika/Colombia



























8.4 Calendar of trade events and exhibitions in 2019-2020








































Event	Date	Recurrence	Venue	Organiser Details
SEPTEMBER 2019				








































Event	Date	Recurrence	Venue	Organiser Details
Expo Alimentos	3-5	Annual	Compensar, Avenida 68, Bogotá	☎ 31 15025070 ✉ adriana.amaya@axiomab2b.com 💻 expoalimentos.com
OCTOBER				
Cafes de Colombia Expo	17-20	Annual	En Corferias - Carrera 37 No 24 - 67 Bogotá	☎ +57 1 381 0000 ✉ Ndiaz@corferias.com ; lcubillos@corferias.com ; DChingate@corferias.com 💻 cafesdecolombiaexpo.com
Expo La Barra	24-25	Annual	Compensar, Avenida 68, Bogotá	☎ 311 502 53 08 ✉ gerente@revistalabarra.com 💻 expolabarra.com
APRIL 2020				
Tecno Lácteos y Tecno Cárnicos	20-21	Biennial	Gran Salón Santafé, Hotel Sheraton, Bogotá	☎ +57 1 863 4697 ✉ info@sofexamericas.com ; milena@sofexamericas.com 💻 tlatca.sofexamericas.com
JUNE 2020				
Alimentec	9-12	Biennial	Corferias Centro Internacional de Negocios y Exposiciones, Bogotá	☎ +57 1 210 9979 ✉ d.zuleta@koelnmesse.co 💻 feriaalimentec.com
SEPTEMBER 2020				
Congreso Nacional Avícola	5-7	Biennial	Centro de Convenciones CENFER de Bucaramanga, Santander	☎ +57 1 321 1212 ✉ congreso2018@fenavi.org 💻 congresonacionalavicola.com







































8.5 Database of professionals' contacts

List of relevant buyers, importers and distributors









































Company name	Type	Area of interest	Contact information
18scalini	Distribution	Italian F&B	 3573495 - 2499287  contacto@18scalini.com  www.18scalini.com
Alitec de Colombia S.A.S	Import/ Distribution	Condiments	 +57 (2) 380 9603  ventas@alticdecolombia.com  www.alitecdecolombia.com
Almendras y Chocolates	Distribution	Confectionary	 +57 3108748944  www.almendrasychocolates.com
Alternative Beer	Import	Premium beer	 +57 310 534 3246  info@alternativebeer.com.co  alternativebeer.com.co
Arflina	Import/ Distribution	F&B	 +57 (1) 795 6840  contacto@arflina.com  www.arflina.com
Artegel	Import/ Distribution	Ingredients, Sweet products	 +57 (1) 268 6080  comercial@artegel-italia.com  artegelitalia.com.co
Austin	Distribution	Meat	 +57 (4) 4 48 77 26  www.austin.com.co
Badia	Importer	Ingredients	 +57 (4) 448 5774  info@badiacolombia.com  badiacolombia.com
Best Choice	Import/ Distribution	Ingredients	 +57 (1) 428 4631 – 428 3004 – 300 1139  ventas@bestchoiceltda.com  www.bestchoiceltda.com
Bodega Gourmet	Import	Premium food and beverages	 +57 (4) 448 8466  info@bodegagourmet.com  www.bodegagourmet.com
BoGourmet SAS	Import/ Distribution	Premium Wine and Spirits	 +57 320 243 9563  info@bo-gourmet.com  www.bo-gourmet.com
Campania LTDA	Import/ Distribution	Italian F&B	 +57 (1) 249 2659/79  campania.com.co
Carnes Proa	Import/ Distribution	Meat	 +57 (1) 271 4365 – 271 4375  info@carnesproa.com ;  pedidos@carnesproa.com








































			 carnesproa.com
Carsdecol	Import/ Distribution	Foodstuff	 +57 3102681188  comercial@carsdecol.com  carsdecol.com
Casa Ibanez	Import/ Distribution	Processed meat, Olive oil, Chocolate etc.	 551 7317 - 663 1412  casaibanez@casaibanez.com  www.casaibanezcolombia.com
Casa Italia Gourmet	Import/ Distribution	Italian foodstuff	 +57 320 478 5136  info@casaitaliagourmet.com  www.casaitaliagourmet.com
Casa Pedro Domecq	Import/ Distribution	Wine, Spirits	 +57 (1) 254 1000  www.pdc.com.co
Cava de Quesos	E-commerce/ Import/ Distribution	F&B	 +571 305 409 7500  info@cavadequesos.com  cavadequesos.com
Centurion Foods	Import/ Distribution	Cheese	 321 573 0517 - 321 573 0491 - 321 573 0484 - 321 591 0181  centurionfoods.com
Chiminigagua	Import/ Distribution	Italian wine	 +57 (1) 282 0885 - 478 5191  chiminigaguaitda@gmail.com  www.chiminigagua.com
Comercializadora Internacional L&G S.A Ci	Importer/ Distribution	Fruit, Snacks	 +57 (1) 613 1182  www.comercializadoralyg.com
Comestibles Alfa LTDA	Import/ Distribution	Premium food	 +57 (1) 893 2191  contactenos@comestiblesalfa.com  comestiblesalfa.com
Corbastos	Wholesale market	Mainly fresh products	 +57 (1) 453 7188  atencioncliente@corabastos.com.co  corabastos.com.co
De Hispania	Distribution	Spanish F&B	 +57 (2) 374 4488 - 442 5431  ventasxmayor@dehispania.com.co  dehispania.com.co
Dicermex	Import	Premium F&B	 +57 (1) 244 2727  presidenciamed@dislicores.com  dicermex.com.co
Dislicores	E-commerce/ Import/ Distribution	Chocolate, Spirits, Wine etc.	 +57 (4) 232 3060/288 6494  presidenciamed@dislicores.com  www.dislicores.com
Dismel	Import/ Distribution	Foodstuff and pet food	 3205424180  gustavo.franco.m@dismelltda.com

			 dismelltda.com
Disnar S.A.S	Distribution	F&B	 370 4453 - 370 4454 ; (321) 556 7859  www.disnarsas.com
Distribuidora A&H	Import/ Distribution	Wine	 (5) 6658044 ; 3157316423  distribuidora.ah@gmail.com  ahwines.co
Distribuidora Colombia	Distribution	Wine, Spirits	 +57 (5) 662 8324 ; +57 (5) 662 8327  info@distribuidoracolombia.com  www.distribuidoracolombia.com
Distribuidora de Frutas Santa Clara LTDA	Distribution	Fruit	 +57 (4) 285 2046  distribuidorasantaclara@une.net.co
Distrimarket S.A	Import/ Distribution	Beer, Wine, Spirits, Processed F&V etc.	 889 1022  distrimarket.com.co
Divinus	E-commerce/ Import/ Distribution	Wine	 +57 (4) 539 9609  info@divinus.co  divinus.co
Eccellenze Italiane S.A.S	Import	Italian F&B	 +(57) 315 540 9871 ; +(57) 317 668 0934  administracion@eccellenzeitaliane.co  www.eccellenzeitaliane.co
Enalia LTDA	Import	Wine	 369 0040  redsocial@enalia.com.co  www.enalia.co
Escobar Vinos y Licores	Import/ Distribution	Spirits, Wine	 +57 (1) 3410156 - 336 3492  vinoypoesia330@hotmail.com  www.escobarvinosylicos.com
Eurocolombia	Import/ Distribution	Spirits, Wine	 +57 (1) 286 1677  www.eurovinocolombia.com
Foodbox	Import/ Distribution	Meat	 +57 (1) 7714756  foodbox.com.co
Fresh World	Import	F&V	 +57 (1) 293 9598/9629  info@freshworld.com.co  www.freshworld.com.co
Fruandina	Import/ Distribution	Fruit	 +57 (1) 841 5680 / 841 5681  asifrut.com
Frutcom S.A.	Import	Fruit	 +57 (1) 452 3506  frutcom@frutcom.com
Fruticola de Colombia	Import/ Distribution	Premium fruit	 +57 (2) 666 8050  info@fruticoladecolombia.com  www.fruticoladecolombia.com

Fruto Vitale SAS	Import	Fruit	 +57 (1) 740 5334  administracion@frutovitale.com.co  frutovitale.com.co
Gabrica	Import	Pet food	 +57 (1) 519 0040  www.gabrica.co
Global Wine & Spirits	Import/ Distribution	Wine, Spirits	 +57 4846090  contactcenter@gwspirits.com  gwspirits.co
Gopa Importaciones S.A.	Import/ Distribution	Confectionary	 +57 (1) 201 7379  gopaimportaciones.com
Greco S.A.	Import/ Distribution	Chocolate & Confectionary, Olive oil,	 +57 (4) 289 3390  www.greco.com.co
Green & Fresh LTDA	Import	Fruit	 +57 (1) 265 6096  astridsuarez@hotmail.com  www.greenandfresh.com.co
Grupo Exito	Retail	F&B	 01 8000 412 040  www.grupoexito.com.co
Grupo Megalimentos	Import/ Distribution	F&V	 +57 212 750.4040 / 4041 / 4042  info@grupomegalimentos.com  www.grupomegalimentos.com
Grupo Sterling	Import/ Distribution	Beer, Wine, Spirits	 +57 (1) 415 2355  reception@gruposterling.com  gruposterling.com
Iconopet	E-commerce/ Distribution	Pet food	 iconopet.com
Il Magazzino Italiano	Import/ Distribution	Italian F&B	 +57 1 6102900  prodotti@email.com
Impodulces	E-commerce	Confectionary	 +57 (1) 309 9314  www.impodulces.com.co
Importadora Becerra Gallego LTDA	Import	Fruit	 +57 (1) 293 3063  impbecgall2@tutopia.com
Importfrut	Import/ Distribution	Fruit	 +57 (1) 265 7653  jexcol@yahoo.com
Inali Zona Franca S.A.S.	Import/ Distribution	Condiments and spices	 +57 (2) 320 8484  contacto@inali.co  www.inali.co
Internacional de Comercio S.A.S	Import/ Distribution	Processed meat	 +57 (1) 615 7778 – 759 4420  gerenciaaym@ayminternaciona.com  ayminternacional.com

JuanBe S.A.	Import/ Distribution	Wine, Spirits	☎ +57 (1) 4167950 ✉ contacto@juanbe.co 🌐 juanbe.co
Jumbo Cencosud	E-commerce	F&B	☎ +57 (1) 657 9797 🌐 www.tiendasjumbo.co
La Careta	Distribution	Spirits	☎ +57 (4) 448 1646 🌐 informacion.licoreslacareta.com.co
La Casa de los Quesos	E-commerce / HoReCa	Cheese	☎ 966 179 355 ✉ info@lacasadelosquesos.com 🌐 lacasadelosquesos.com
La Factoria Gourmet	Import/ Distribution	Italian & Spanish foodstuff	☎ +57 (1) 745 6975 ✉ info@lanacionaldelicores.com 🌐 www.lafactoriagourmet.com
La Licorera	E-commerce	F&B	☎ 382 7017 🌐 www.lalicorera.com
La Mejor S.A.	Distribution	Wine, Chocolate & Confectionary	☎ +57 (1) 217 19 09 / 235 95 43 🌐 www.distribuidoralamejor.com
La Nacional de Licores	Distribution	Spirits	☎ 432 56 10 ✉ info@lanacionaldelicores.com 🌐 www.lanacionaldelicores.com
La Peseta Gourmet	Import/ Distribution	Spanish foodstuff	☎ +57 (1) 310 6288 ✉ info@lapesetagourmet.com 🌐 www.lapesetagourmet.com
La Rioja	Import/ E-commerce	Spanish foodstuff	☎ +57 (1) 702 7953 ✉ tiendacalle94@larioja-foods.com 🌐 larioja-foods.com
Les Châteaux de Pascal	Import	French wine	☎ +57 (1) 257 9501 ; +57 (1) 316 693 4036 ✉ info@emporium.com.co 🌐 www.leschateauxdepascal.com
Licorela	Import/ Distribution	Premium wine	☎ 4826000 ✉ ventas@licorela.com; gv@licorela.com 🌐 www.licorela.com
Mambo	Import/ Distribution	Fresh and processed fruit	☎ +57 5 662 5545 ; +57 5 674 5360 🌐 www.mamboshipchandler.com
Maxifrutas LTDA	Import/ Distribution	Fruit	☎ +57 (1) 451 7555 – 264 9743 ✉ maxifrutasltada@etb.net.co
Mercato Italiano	Import/ Distribution	Italian food	☎ +57 (1) 6731953 ; +57 (1) 6791181 ; +57 317 403131 ✉ comercial@mercatoitaliano.co

			 www.mercatoitaliano.co
Mesa Italiana	Import/ Distribution/ E-commerce	Italian food	 +57 444 4675  www.mesaitaliana.com.co
Morenos	Import/ Distribution	Chocolate & Confectionary, Ice cream	 +57 (1) 630 3930  r.moreno@morenos.com.co  www.morenos.com.co
Nieto y Milevcic LTDA	Import	Fruit	 +57 (1) 428 6677  oficinacorabastos@setaspotin.com
OCICO	E-commerce	Pet food	 +57 (1) 703 6997 ; +57 304 408 3080  ventas@ocico.co  www.ocico.co
Parupa Colombia	Import/ Distribution	Foodstuff	 +57 318.484.3443  info@parupa.com  www.parupa.com
Pets Andina	Import/ Distribution	Pet food	 +57 3507072378  info@petsandina.co  www.petsandina.com
Premium beers	Import/ Distribution	Premium beer	 7522980 – 7521526  info@premiumbeers.com.co  premiumbeers.com.co
Rappi	E-commerce	F&B	 +57 (1) 316 3535  www.rappi.com.co
Romago	Import/ Distribution	Wine	 +57 (1) 680 223  importadoraromago.com
Santifruit	Import	Fruit	 +57 (7) 676 0793  mywebrhs.wixsite.com
Sestier Di Venezia LTDA	Import	Italian wine	 +57 (1) 702 3236  info@sestierdivenezia.com  www.sestierdivenezia.com
Soca International	Import	Chocolate & Confectionary, Biscuits	 +57 (1) 390 5856  info@soca.com.co  www.soca.com.co
Solo Fruver	E-commerce/ Distribution	F&V	 +57 (2) 337 3652 ; +57 (2) 371 2727  info@tiendasolofruver.com  www.solofruver.com
Sunterra Trading	Import	Processed fruit	 +57 4 313 8647  info@sunerratrading.com  www.sunerratrading.com
Sweet Brands	Import/ Distribution	Confectionary	 +57 (1) 305 6536  info@sweetbrands.co

			 sweetbrands.co
The First Fruit LTDA	Import/ Distribution	European F&B	 +57 (1) 450 0641  thefirstfruit@etb.net.co
The International Executive	Import/ Distribution	Wine, Spirits, Gourmet food	 tinterex.com
The Wine Store	Import	Wine	 (1) 610 4240 – 316 5238621  tienda@thewinestore.com.co  www.thewinestore.com.co
Tiendas Ara	Distribution	F&B	 servicioalcliente@tiendasara.com  www.aratiendas.com
Tropi Abastos	Distribution	F&B	 +57 (1) 447 0088  info@tropiabastos.com  www.tropiabastos.com
Tropi Huila S.A.S	Distribution	F&B	 +57 (8) 826 5566  info@tropihuila.com  www.tropihuila.com
Unifrutas LTDA	Import/ Distribution	Fruit	 +57 (1) 264 1147 – 424 4056  unifrutasltada@yahoo.es  asifrut.com
Vigomez S.A.	Import/ Distribution	Fruit	 +57 (1) 452 16 19 - 370 20 88  logística@vigomez.com  vigomez.co
Vinal s.a.s	Import/ Distribution	Olive oil, Wine	 312 648 5404  ventascal@vinal.co  vinal.co
Vinalium	Import/ Distribution/ HoReCa	Wine	 (+57) 311 277 43 23  info@vinalium.com.co  www.vinalium.com.co
Vinas Boutique	Import/ Distribution	Wine	 +57 (4) 312 1897  importaciones@vinasboutique.com  www.vinasboutique.com
Vincorte S.A.	Import/ Distribution	Wine	 +57 (2) 3110909 ; +57 (2) 4890808  www.vincorte.com
Vino Sylicores	Distribution	Wine	 +57 (4) 354 1212  www.vinosylicos.com.co
Vinos del Rio	Import/ Distribution	Wine	 317 4278020  ventas@vinosdelrio.com  www.vinosdelrio.com
Wine&Co.	Import/ Distribution	Wine	 +57 1 254 1001  www.wineco.com.co

9 European products registered as GIs under the EU-Colombia and Peru Trade Agreement

EU agricultural products and foodstuffs (33)

Trademark Name	Product Category
CZECHIA	
Českobudějovické pivo	Beer
DENMARK	
Danablu	Cheese
FRANCE	
Brie de Meaux	Cheese
Camembert de Normandie	Cheese
Canard à foie gras du Sud-Ouest	Processed meat (Duck fatty liver)
Comté	Cheese
Emmental de Savoie	Cheese
Huile d'olive de Haute-Provence	Olive oil
Huile essentielle de lavande de Haute-Provence	Oil (Lavender essential oil)
Huîtres de Marennes-Oléron	Fresh fish, molluscs, and crustaceans (Oyster)
Jambon de Bayonne	Processed meat (Ham)
Pruneaux d'Agen / Pruneaux d'Agen mi-cuits	Processed F&V (Dried cooked plums)
Reblochon	Cheese
Roquefort	Cheese
GERMANY	
Bayerisches Bier	Beer
Münchener Bier	Beer
GREECE	
Ελιά Καλαμάτας (Elia Kalamatas)	Olives
Φέτα (Feta)	Cheese
Μαστίχα Χίου (Masticha Chiou)	Gum
ITALY	
Aceto balsamico Tradizionale di Modena	Other products – Sauce
Gorgonzola	Cheese
Grana Padano	Cheese
Mortadella Bologna	Processed meat
Prosciutto di Parma	Processed meat (Ham)
Prosciutto di San Daniele	Processed meat (Ham)
Prosciutto Toscano	Processed meat (Ham)
Provolone Valpadana	Cheese
Parmigiano Reggiano	Cheese
Taleggio	Cheese
Zampone Modena	Processed meat

Trademark Name	Product Category
PORTUGAL	
Queijo de São Jorge	Cheese
SPAIN	
Idiazábal	Cheese
Priego de Córdoba	Olive oil

Source: Annex XIII of the EU-Colombia and Peru Trade Agreement.

EU Wines and Spirits (82)

Trademark Name	Product Category
AUSTRIA	
Inländerrum	Spirits
Jägertee / Jagertee / Jagatee	Spirits
CYPRUS	
Κουμανδάρια (Commandaria)	Wines
Ζιβανία / Τζιβανία / Ζιβάνα / Zivania	Spirits
FINLAND	
Finnish berry liqueur / Finnish fruit liqueur	Spirits
Vodka of Finland	Spirits
FRANCE	
Alsace	Wines
Anjou	Wines
Armagnac	Spirits
Beaujolais	Wines
Bordeaux	Wines
Bourgogne	Wines
Cadillac	Wines
Calvados	Spirits
Chablis	Wines
Champagne	Wines
Châteauneuf-du-Pape	Wines
Cognac	Spirits
Côtes de Provence	Wines
Côtes du Rhône	Wines
Côtes du Roussillon	Wines
Fronton	Wines
Graves (Graves de Vayres)	Wines
Haut-Médoc	Wines
Languedoc (Coteaux du Languedoc)	Wines
Rhum de la Martinique	Spirits
Margaux	Wines

Trademark Name	Product Category
Maury	Wines
Médoc	Wines
Moselle	Wines
Pommard	Wines
Romanée Saint-Vivant	Wines
Saint-Emilion	Wines
Saint-Julien	Wines
Sauternes	Wines
Touraine	Wines
Val de Loire	Wines
GERMANY	
Korn/Kornbrand	Spirits
GREECE	
Oúzo (Ouzo)* <i>Product of CYPRUS/GREECE*</i>	Spirits
HUNGARY	
Tokaj	Wines
IRELAND	
Irish Cream	Spirits
Irish whiskey / Uisce Beatha Éireannach / Irish whisky	Spirits
ITALY	
Asti	Wines
Bardolino (Superiore)	Wines
Brunello di Montalcino	Wines
Chianti	Wines
Conegliano - Valdobbiadene - Prosecco	Wines
Franciacorta	Wines
Grappa	Spirits
Lambrusco di Sorbara	Wines
Lambrusco Grasparossa di Castelvetro	Wines
Montepulciano d'Abruzzo	Wines
Soave	Wines
Toscana/a	Wines
Vernaccia di San Gimignano	Wines
Vino nobile di Montepulciano	Wines
LITHUANIA	
Originali lietuviška degtinė / Original Lithuanian vodka	Spirits
POLAND	
Polska Wódka / Polish Vodka	Spirits
PORTUGAL	

Trademark Name	Product Category
Douro	Wines
Porto, Port or Oporto	Wines
Vinho Verde	Wines
SLOVAKIA	
Vinohradnícka oblasť Tokaj	Wines
SPAIN	
Alicante	Wines
Brandy de Jerez	Spirits
Cataluña	Wines
Cava	Wines
Empordà	Wines
Jerez – Xérès – Sherry	Wines
La Mancha	Wines
Málaga	Wines
Navarra	Wines
Priorat	Wines
Rías Baixas	Wines
Ribera del Duero	Wines
Rioja	Wines
Rueda	Wines
Somontano	Wines
Utiel-Requena	Wines
Valdepeñas	Wines
Valencia	Wines
SWEDEN	
Svensk Vodka / Swedish Vodka	Spirits
UK	
Scotch Whisky	Spirits

Source: Annex XIII of the EU-Colombia and Peru Trade Agreement.

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