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Report Highlights:

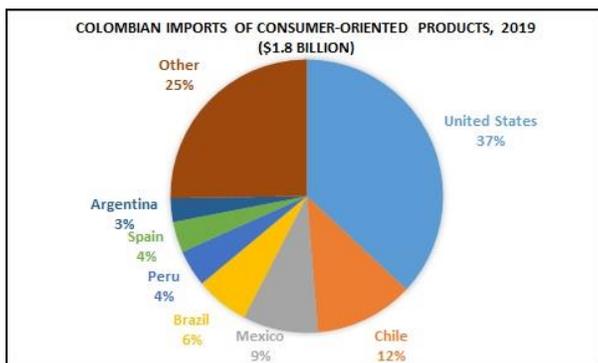
American exporters face new market conditions in Colombia, as well as new opportunities, as the country emerges from the novel coronavirus (COVID-19) pandemic. Private-label product market share, especially for more affordable rice, beans, and canned tuna, is increasing. Companies providing large discounts increased their market presence, benefiting from the economic downturn. COVID-19 influenced consumer habits and preferences. These are altering the landscape for retailers, food industry, and food service.

Market Fact Sheet: Colombia

Executive Summary: Colombia is the leading destination for U.S. agricultural exports in South America, followed by Chile and Peru. In 2019, U.S. agricultural exports to Colombia were valued at \$2.6 billion.

Imports of Consumer-Oriented Products:

Colombia's imports of consumer-oriented products from all suppliers grew 6 percent in 2019 to \$1.89 billion. Colombian imports from the United States grew by 15 percent to \$700.4 million in 2019, followed by Chile (\$222 million) and Mexico (\$169 million). Consumer-oriented products account for 29.7 percent of U.S. food and agricultural exports to Colombia.



Food Processing Industry: Colombia is a net importer of many food ingredients. There is a growing domestic demand for higher quality confectionary products. The Colombian fats and oils sector imports unrefined soybean oil and other oil seeds to meet industrial demand. The milling, bakery, and starches sectors have benefited from innovation in flavors and healthier ingredients.

[Food Processing Ingredients GAIN Report](#)

Food Retail Industry: Western style, large supermarkets are part of a noteworthy retail transformation in the last decade with major, domestic and international grocery chains opening new stores. Discount stores have increased market share and continue opening outlets throughout the country, offering private label portfolios. [Food Retail Industry GAIN Report](#)

Food Service Industry: The restaurant and food service sector is expected to expand as a consequence of growing incomes and higher participation of women in the labor force, resulting in a stronger incentive to dine out and/or utilize delivery food services; roasted chicken, hamburgers, and pizza are a few of the preferred products that Colombians order using delivery service. [Food Service Industry GAIN Report](#)

Population: 50.3 million (2020)

GDP: \$394.8 billion (32nd global ranking)

GDP per capita: \$6,432

Top 10 Main Consumer-Oriented Products Imported by Colombia (MM dollars):

Description	2018	2019	Change
Food preparations	\$253.4	\$276.7	9%
Frozen swine	\$195.5	\$203.5	4%
Fresh apples	\$92.1	\$93.3	1%
Frozen chicken (cuts/offal)	\$63.7	\$86.0	35%
Beer from malt	\$92.8	\$68.4	-26%
Food preparations for infant use	\$77.8	\$59.5	-24%
Concentrated milk and cream, fat content not exceeding 1.5%	\$30.6	\$54.6	79%
Wine	\$48.3	\$53.6	11%
Concentrated milk and cream, fat content exceeding 1.5%	\$34.1	\$51.2	50%
Dog and cat food	\$43.6	\$50.1	15%

Main HRI companies

Hotels	Restaurants	Institutional
Decameron	El Corral	Sodexo SAS
Hoteles Estelar	Frisby SA	Compass Group Services
Tour Vacation	McDonald's	Servihoteles

Top 5 Retailers	Top 5 Food Manufacturers
Grupo Exito	Grupo Nutresa
Alkosto	Colanta
Olímpica	Alpina
DI	Colombina
Cencosud	Nestlé de Colombia

Sources: Trade Data Monitor, World Bank, Global Agricultural Trade System, Euromonitor, DANE, IMF, various online sources. For additional information, contact agbogota@fas.usda.gov

I. MARKET SUMMARY

According to the IMF, Colombian Gross Domestic Product (GDP) will decrease 8.2 percent in 2020, after a stable GDP growth decade. But based on the Colombian Central Bank, the economy will recover by the end of 2021, reaching the 2019 economic level. The COVID-19 pandemic affected domestic demand due to higher unemployment and household income decrease. Six million of Colombians moved back from middle-income class to poverty threaten economic stability. According to the World Bank's 2020 Doing Business survey, Colombia has the third best business environment in Latin America, after Mexico, and Puerto Rico. For more information, please see [Colombia's Doing Business Profile](#).

Colombia is the third most populous country in Latin America with 50.3 million inhabitants. Eighty percent of the Colombian population resides in urban areas. Colombia is atypical of Latin America with decentralized urban centers and five cities with over one million residents: Bogota, Medellin, Cali, Barranquilla, and Cartagena. Urbanization keeps growing, stimulating changes in lifestyles and eating patterns.

Urban households in Colombia are becoming more typically dual income, resulting in an increasing demand for processed food and shopping convenience. Family size is decreasing. In Bogota, the average household was 3.1 members in 2019 and will be 2.2 by 2050. The population is aging as birth rates decrease and life expectancy increases. Venezuelan immigration is another key demographic trend. Colombia received approximately 1.8 million Venezuelans as of December 2020, affecting consumption of main food staples such as beans, rice and corn flour.

The COVID-19 seriously impacted the economy and caused a recession. Households decreased expenditures and changed purchase habits. For example, consumers preferred private label products. According to "The New Shopper Normal" survey published by Nielsen, new consumer habits will remain after the pandemic. From March to July 2020, sales of products related to cooking and baking at home constantly increased: flour (63 percent), pasta (35 percent) and sugar (10 percent). Colombian households are saving money and avoiding take-away meals (49 percent), reducing out-of-home entertainment (46 percent), decreasing new clothing expenditure (46 percent), buying cheaper food product brands (41 percent), and eliminating holiday travel (30 percent).

The consulting firm Dunnhumby analyzed new Colombian consumer trends, and concluded the following:

- Shoppers are looking for one-stop-shop by going fewer times to outlets, visiting fewer stores, and increasing their on-line purchases to reduce infection risk.
- Purchases are more conscious and less impulsive; buyers are thinking twice before making buying decisions and are more added-value sensitive.
- Opportunities exist for private label and convenience products.
- Opportunities exist for ready-to-cook and ready-to-eat products.
- E-commerce adoption has accelerated and retailers have had to face logistical challenges as they prepare for unexpected demand, while restaurants have had to adapt their menus.
- New e-commerce competitors are also looking for opportunities when it comes to final consumers.

Information on Colombian food trends is covered by the [Food Processing Ingredients GAIN Report](#), the [Food Retail Industry GAIN Report](#) and the [Food Service - HRI GAIN Report](#)

Advantages and Challenges for U.S. Exporters

Advantages	Challenges
The U.S.-Colombia Trade Promotion Agreement (CTPA) expands opportunities and market potential for many food and agricultural products.	Colombia has trade agreements with many other countries increasing competition with U.S. products.
U.S. agricultural products have a reputation for high quality.	Colombian per capita consumption for processed and semi-

	processed products is low; for example bread consumption is only 24kg/year, still low compared to other Latin American markets.
The success of American style restaurants provides an avenue for introducing U.S. recipes and food ingredients into the Colombian diet.	Depreciation of Colombian peso might affect U.S. export competitiveness.
The growth of tourism and the hotel and restaurant sectors will require a greater array of raw materials and ingredients to make final products more appealing to foreigners and fast changing domestic consumer tastes and preferences.	There is a cultural misperception that frozen products are unhealthy and lack quality.
The growing lower and middle-income population, especially youth and working women, are stimulating new consumer trends and a growth in processed foods.	Internal transportation costs from ports of entry are costly due to extremely poor infrastructure.
Market opportunities for health foods and organic products are expanding given growing obesity trends and GOC support for healthy living campaigns.	Cold chain is deficient and increases logistical costs.
U.S. food suppliers and manufacturers have a positive reputation for food safety, availability, quality, and delivery.	Increasing consumer preference for local products, especially dairy, fruits, vegetables and meat, due to government policies in reaction to Covid-19.

II. EXPORTER BUSINESS TIPS

Any U.S. exporter entering the Colombian market should understand customer needs and their purchasing requirements and specifications. Additionally, they must understand all Colombian standards and regulations to avoid clearance delays at ports of entry. Critical considerations for market entry include the following:

- Competition is based on quality, price and service;
- Develop market research to better understand competitors, consumers' preferences and business environment;
- Contact large importers, wholesalers/distributors, or retailers;
- Direct to consumers marketing strategies are imperative in order to penetrate the market, such as cooking demonstrations, and tastings, etc.;
- Social responsibility marketing techniques continue to perform well, using sales to generate funding for social programs;
- U.S. suppliers should develop ways to meet the needs of the Colombian market, ideally through personal visits, to better understand the market and identify needs of buyers and consumer trends;
- Consider consolidation when exporting small amounts of product;
- Establish direct contact with hotel and restaurant chains;
- Develop business relationships with top executives (marketing directors, purchasing managers, etc.) and expose them to U.S. business practices;
- Participate in local trade and promotion shows, such as [Alimentec](#), [Agroexpo](#) and [Expovinos](#), and also participate in trade delegations;
- Many Colombian company representatives visit trade shows in the United States, such as the American Food and Beverage Trade Show, the National Restaurant Association Show and the Fancy Food Summer Show, which are great opportunities to meet and educate Colombian importers;
- Develop Spanish marketing/communication materials, if feasible;
- Work closely with local importers to comply with food import regulations to facilitate the registration and import of food products and minimize port of entry risks;
- Support the importer with promotional campaigns.

For more information on doing business in Colombia, see [Colombia Country Commercial Guide](#)

III. IMPORT FOOD STANDARDS & REGULATIONS and IMPORT PROCEDURES

Customs Clearance

The Ministry of Commerce, Industry and Tourism (MINCIT) and the National Tax and Customs Directorate (DIAN) are responsible for the administration of overall import-export operations and customs procedures, respectively.

Documents Required by the Country Authority for Imported Food

Every Colombian importer must be registered with MINCIT. All U.S. exporters seeking to sell to a Colombian importer should verify that the importer has obtained the legal authorization to import food and agricultural products from MINCIT and, depending on the type of product to be imported, other government authorities including the Colombian Institute for Agriculture and Livestock (ICA) and the National Institute for the Surveillance of Food and Medicines (INVIMA). Additionally, every importer (company or person) must obtain an “electronic signature” from the Ministry of Finance. All of these procedures can be completed online at the [“Unique Window for Foreign Trade”](#).

ICA has the regulatory authority over the production, manufacturing and use of agricultural inputs (fertilizers, pesticides, seeds, etc.), feed, feed ingredients and non-processed agricultural commodities, as well as establishing and regulating Maximum Residue Limits (MRLs) for pesticide residues in both, animal and plant products. ICA is also responsible for developing and implementing animal and plant health import requirements.

INVIMA is the regulatory authority responsible for regulating food safety and sanitary conditions of products sold directly or indirectly for human consumption. The GOC is committed to following internationally accepted guidelines, such as Codex Alimentarius, for developing food safety and animal and plant health import regulations.

ICA and INVIMA JURISDICTION

ICA	INVIMA
<i>Bulk Products:</i> wheat, corn, coarse grains, rice, soybeans, oilseeds, cotton, pulses, etc.	<i>Bulk Products:</i> wheat, corn, rice, pulses, etc.
<i>Intermediate Products:</i> soybean meal, live animals, hides & skins, feeds & fodders, planting seeds.	<i>Intermediate Products:</i> soybean oil, animal fats, sugar, sweeteners.
<i>Consumer Oriented Products:</i> fresh fruits and vegetables, pet food.	<i>Consumer Oriented Products:</i> meat and meat products, eggs, dairy products, processed fruits and vegetables, fruit and vegetable juices, confectionary products, prepared food, alcoholic and non-alcoholic beverages.

Labeling Requirements

Information must be provided in Spanish either on the label or, under certain circumstances, on an authorized sticker/label affixed to the product. In certain cases, in the absence of English labels, INVIMA will authorize Spanish labels to be affixed to the product during or after the nationalization process at authorized warehouses or storage facilities. However, INVIMA will require original labels that to, at the very least, include expiration date and lot number.

When food products or food raw food materials originate in countries where information on the expiration date and/or minimum shelf life (“best before...”) information is not required, the importer must get prior approval from INVIMA by providing that information in a document issued by the producer/manufacturer. Note: A U.S. date is registered MM/DD/YYYY, whereas in Colombia the date is registered DD/MM/YYYY.

Tariffs and FTAs

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

There are significant opportunities for imported, value-added food products and raw materials in Colombia due to shifting consumer preferences. U.S. competitors for raw materials for processing and value-added products are MERCOSUR, Canada, and the European Union, all of which have free trade agreements with Colombia.

For further information on specific agricultural products based on the Harmonized Tariff Schedule (HS) and TRQ schedule for certain agricultural products, please refer to Section 2 of the following link: [Colombia Trade Promotion Agreement - Final Text](#)

RICE: [http: Col-Rice ETC](#)

POULTRY: [Colom-Peq ETC](#)

Trademarks and Patents Market Research

The patent regime in Colombia currently provides a 20-year protection period for patents. Provisions covering protection of trade secrets and new plant varieties have improved Colombia's compliance with its World Trade Organization – Agreement on Trade Related Aspects of Intellectual Property Rights (TRIPS) obligations.

The FAIRS Country Report for Colombia contains detailed information on Colombia's import regulations and procedures and may be downloaded at [FAIRS Annual Country GAIN Report](#)

IV. MARKET SECTOR STRUCTURE AND TRENDS

The local food industry has reacted to consumer new trends. These changes include greater interest in healthy lifestyles and growing preference for lower price food products, including private label and smaller packaging.

Retailers are widening their private label portfolio and offering not only main staples, but “premium” product categories too, like healthy and organic food products. Private label annual sales grew 17.3 percent up to May 2020, while commercial brands, 11.3 percent. Retailers adjusted to quarantine measures by incorporating regular special offers and expanding their private label lines.

Other retailers offered discounts to consumers adapting to COVID-19 by widening product portfolio (mostly focusing on private label), improving logistics, adopting digital tools to better connect to clients, providing delivery service, and keeping expanding their presence in the country. Their market share increased from 13 percent in 2020 first quarter to 18 percent in the second quarter.

Mom-and-pop stores did not react as readily to new market conditions. Although there are some initiatives from the food industry to support the technology adoption by traditional shops, efforts are not enough. While 2020 first quarter mom-and-pop market share was 45 percent, it decreased to 32 percent in the second quarter.

Based on Euromonitor reports, strict lockdown led to a boom in digital platforms usage, as 70% of Colombians sought ways to simplify their lives. Most retailers have websites available for shopping online and all kind of smartphone applications ease the grocery shopping experience.

Digital platforms such as Rappi, Uber Eats, Domicilios.com and iFood successfully connected restaurants with consumers and have been key to face foodservice challenges that have arisen as a result of the pandemic.

Retail sector

Traditional retail outlets are still the most common shopping format in Colombia. A recent commerce surveys concluded that in Bogota there is a mom-and-pop store for every 94 homes and 49% of consumers prefer buying in this kind of stores because of proximity, convenience, product portfolio and services that are not found in other formats. The top products sold in mom-and-pop stores are beer, sodas, milk, cigarettes and snacks.

The biggest retailer in Colombia is Grupo Exito. This company has innovated through new retail formats and transformed a few Exito hypermarkets into Exito WOW and some Carulla supermarkets into Carulla Fresh Market in order to respond consumers' demands, ease and improve the shopper experience integrating off line and on-line platforms, and targeting different market segments based on new lifestyle trends.

It is estimated that 80 percent of Colombian households buy at least one product in discount stores. These shops are smaller and have a limited product portfolio, reason why consumers also buy from other retail players in order to satisfy their product needs.

Delivery services and online commerce have become the best option for consumers to buy main food and sanitary staples. Most retailers have websites available for shopping online and all kind of smartphone applications ease the grocery shopping experience. According to Euromonitor, food and beverages are among the products preferred by Colombian consumers when buying online. Most demanded food products during the isolation period were frozen vegetables, chickpeas, corn flour, dietary supplements, pasta, and lentils.

The table below provides information on main food retailers in Colombia.

Type	Retailer	2019 Sales (\$ million)	Outlets	Website
Supermarket, hypermarket and cash and carry	Grupo Exito	\$16,767	537	https://www.carulla.com/ https://www.exito.com/ https://www.surtimax.com.co/
Supermarket and hypermarket	Olímpica	\$1,866	371	http://www.olimpica.com/
Supermarket and hypermarket	Alkosto	\$1,759	16	http://www.alkosto.com/
Hard discount	D1	\$1,155	1,373	http://www.tiendasd1.com/
Supermarket and hypermarket	Cencosud	\$1,149	105	https://www.tiendasjumbo.co/ https://www.tiendasmetro.co/

Source: various online sources

Food service sector

In the last 10 years, Colombian consumers' tastes and preferences have changed as they seek new products and demand higher quality and product innovation. According to surveys from a local food service organization, fresh, premium meat cuts represent 48 percent of HRI purchases, followed by non-alcoholic drinks (17 percent), fruits and pulses (15 percent), other foods and beverages (16 percent) and other inputs (4 percent). Although Colombians like eating at home, and have been forced to as a result of COVID-19, they also enjoy eating at fast food restaurants due to convenience and affordability. Restaurants offer easy-to-deliver menus and become an ally to clients.

Food processing ingredients sector

In recent years, the Colombian food industry has undergone unprecedented consolidation and structural change through mergers, acquisitions, divestitures and new foreign competitors entering the market. Distribution channels have become more efficient with the increased presence of foreign competitors. Food industry joined e-commerce initiatives to guarantee product supply during COVID-19 challenging situation.

Colombian food processors import soybean and other vegetable oils and sweeteners. The industry is always interested in learning about new trends and sourcing healthier ingredients to respond to consumer preferences for low fat-sugar-sodium food products.

For more information, please see [Food Service GAIN Report](#) [Food Retail GAIN Report](#) and [Food Ingredients GAIN Report](#)

V. AGRICULTURAL and FOOD IMPORTS

Colombian Imports (in millions of dollars)	From the world			From the United States			U.S. market share		
	2017	2018	2019	2017	2018	2019	2017	2018	2019
Consumer Oriented Products	1,625.62	1,780.94	1,895.16	536.30	610.41	700.45	33%	34%	37%
Beef & Beef Products	20.43	26.22	31.59	14.63	19.84	24.62	72%	76%	78%
Pork & Pork Products	183.59	225.72	236.11	163.74	205.62	215.93	89%	91%	91%
Poultry Meat & Prods. (ex. eggs)	77.15	87.30	113.66	65.15	76.19	100.32	84%	87%	88%
Meat Products NESOI	10.37	12.54	12.53	5.83	6.52	6.91	56%	52%	55%
Eggs & Products	2.77	3.62	4.06	0.73	0.63	1.38	26%	17%	34%
Dairy Products	181.44	194.05	224.72	55.35	56.12	96.59	31%	29%	43%
Fresh Fruit	159.78	163.78	164.76	16.80	15.84	11.87	11%	10%	7%
Processed Fruit	59.18	70.07	67.09	9.43	10.84	11.74	16%	15%	17%
Fresh Vegetables	33.91	23.97	35.18	0.44	0.16	0.14	1%	1%	0%
Processed Vegetables	82.43	95.43	102.46	23.26	25.26	25.52	28%	26%	25%
Fruit & Vegetable Juices	12.53	11.20	12.39	3.06	2.27	2.21	24%	20%	18%
Tree Nuts	27.77	35.28	32.62	16.25	22.27	22.88	59%	63%	70%
Chocolate & Cocoa Products	49.15	57.31	59.84	15.62	17.16	17.23	32%	30%	29%
Snack Foods NESOI	65.12	66.13	74.03	7.26	8.12	7.63	11%	12%	10%
Condiments & Sauces	32.88	37.68	42.28	15.36	18.35	20.38	47%	49%	48%
Food Preps. & Misc. Bev	336.81	345.58	379.78	76.33	79.09	89.96	23%	23%	24%
Spices	18.65	21.38	18.45	2.14	2.07	1.83	11%	10%	10%
Tea	8.77	10.20	10.31	2.48	2.75	3.07	28%	27%	30%
Coffee, Roasted and Extracts	21.81	22.97	29.41	0.49	0.71	0.72	2%	3%	2%
Non-Alcoholic Bev. (ex. juices, coffee, tea)	47.98	43.79	26.25	9.05	7.75	8.65	19%	18%	33%
Wine & Beer	130.49	150.13	135.61	10.87	4.48	1.84	8%	3%	1%
Dog & Cat Food	30.86	43.61	50.10	19.87	26.23	27.94	64%	60%	56%
Nursery Products & Cut Flowers	31.77	32.95	31.93	2.17	2.13	1.11	7%	6%	3%
Other Related Products	703.48	877.50	903.45	60.57	116.21	148.46	9%	13%	16%
Distilled Spirits	59.03	82.69	100.80	2.46	3.69	4.58	4%	4%	5%
Ethanol	90.48	135.37	164.33	41.12	96.96	128.70	45%	72%	78%
Biodiesel & Blends > B30	0.00	0.00	3.54	0.00	0.00	0.00			0%
Forest Products	192.56	222.03	208.33	6.47	5.43	5.24	3%	2%	3%
Fish Products	361.41	437.41	426.44	10.52	10.13	9.95	3%	2%	2%

Source: Trade Data Monitor

Best consumer-oriented product prospects

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

The following product categories represent the major export opportunities and some emerging opportunities for U.S. food products to Colombia, based on 2015-2019 Colombian imports growth rates:

Product Category	2019 Import Value (USD million)	5-Yr. Avg. Annual Import Growth	Key Constraints Over Market Development	Market Attractiveness for USA
Poultry Meat & Prods. (ex. eggs)	\$113.66	21%	Aggressive marketing campaign to encourage Colombian chicken consumption	Chicken per capita consumption increased from 18.3 kg/year in 2005 to 36.1 kg/year in 2019
Pork & Pork Products	\$236.11	18%	Aggressive marketing campaign to encourage Colombian pork consumption Need to educate consumers to fight negative association of pork meat with human health	Pork per capita consumption increased from 3.3 kg/year in 2005 to 11.2 kg/year in 2019
Dog & Cat Food	\$50.10	13%	Pet owners still feed pets with table scraps	Growing pet ownership rates Owners look for pet food with nutritional benefits at a reasonable price
Beef & Beef Products	\$31.59	11%	COVID-19 deeply affected foodservice, main U.S. beef customer Growing competition from Argentina and Uruguay Lack of product knowledge	Consumers are willing to pay higher prices for high-quality beef
Wine & Beer	\$135.61	10%	Colombian preference is for Chilean and Argentine wines Wine consumption is still related to celebrations and holiday season	Income shifts and urbanization benefit growth of wine sales

VI. KEY CONTACTS AND FURTHER INFORMATION RELATED REPORTS

Please check following links for further information on Colombian market: [Food Processing Ingredients Guide](#), [Food Retail Industry GAIN Report](#), [Food Service - HRI GAIN Report](#) and [FAIRS](#)

POST CONTACT INFORMATION

Office of Agricultural Affairs (OAA)	USDA Animal Plant Health Inspection Service (APHIS)
U.S. Embassy, Bogotá, Colombia Carrera 45 No. 24B-27 Bogotá, Colombia Telephone: (57-1) 275-4622 e-mail : AgBogota@fas.usda.gov	U.S. Embassy, Bogotá, Colombia Phone: (57-1) 275-4572 Fax: (57-1)275-4571 e-mail: Roberto.Guzman@aphis.usda.gov

COLOMBIAN GOVERNMENT CONTACTS

Phytosanitary and Zoonosanitary Requirements	Food Product Registration and Health Permits
Ministry of Agriculture and Rural Development Colombian Institute for Agriculture and Livestock (ICA), www.ica.gov.co Avenida Calle 26 # 85b – 09, Bogotá, Colombia	Ministry of Health and Social Protection National Institute for the Surveillance of Food and Medicine (INVIMA), www.invima.gov.co Carrera 10 # 64 -28, Bogotá, Colombia
Mariluz Villamil Sandoval	Director Division of Food and Alcoholic Beverages

Deputy Manager Animal Health Protection Tel. (57-1) 332-3700 ext. 1200 E-mail: mariluz.villamil@ica.gov.co	Carlos Alberto Robles Phone: (57-1) 294-8700 Ext. 3920 E-mail: invimasal@invima.gov.co
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Attachments:

No Attachments