



# **Agri-Food Past, Present & Future Report**

## **Colombia**

### **May 2011**



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## Colombia

### Past, Present & Future Report March 2011

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# ***Colombia***

## **Past, Present & Future Report March 2011**

### **Executive Summary**

- With a population of 46 million people, Colombia has the 29<sup>th</sup> largest population in the world and the 2<sup>nd</sup> largest in South America.
- Colombia's GDP is also ranked as the 28<sup>th</sup> highest in the world, with real GDP growth of 4.7% expected at the end of 2010 and 4.6% in 2011.
- Canada's relationship with Colombia is amicable and was boosted by the signing of numerous Andean region free trade agreements (FTA) in 2007.
- In 2008, a new historic Canada-Colombia FTA was signed, allowing Canadian businesses open market access in Colombia, and providing greater access to exporters of products such as wheat, pulses, and barley.
- Colombia is Canada's 4<sup>th</sup> largest export market in South America after Brazil, Venezuela and Chile, and 6<sup>th</sup> largest trading partner in Latin America and the Caribbean (excluding Mexico).
- Colombia ranks as Canada's 22<sup>nd</sup> largest destination for agri-food exports, and in 2009, Canadian agri-food exports grew to \$247 million, from \$212 million in 2008.
- Top agri-food products are wheat, lentils, barley, and peas; however, there is a growing market for processed foods and value-added products. New opportunities are potentially available for exporters of beef, pork, liquors, animal feed and non-tropical fruits.
- Busier lifestyles and rising household incomes are providing opportunities for convenience foods, while changing demographics and consumer preferences are resulting in increased demand for health and organic products.

### **Overview**

The Republic of Colombia is located in Northern South America. With a population of 46 million people, Colombia has the 29<sup>th</sup> largest population in the world and the 2<sup>nd</sup> largest population in South America, after Brazil.

Colombia is a stable, well-established democracy run by a government committed to strengthening the economy through the implementation of tough macroeconomic policies. Strong economic growth in recent years has helped lower unemployment and poverty, and given the country's hopes of moving beyond its internal conflicts and realizing its full economic potential in the foreseeable future.

One of Colombia's main industries is agriculture. With the production of coffee, bananas, sugar, cotton and meat, farming is the mainstay of the Colombian economy. Agriculture accounts for 9.3% of GDP and employs over 17.1% of the workforce. Manufacturing and mining are the other main industries.

Colombia's main export market is the United States (U.S.), but trade with neighbouring countries is very important and Colombia is looking to expand into the Asia Pacific market. Colombia ranks as Canada's 32<sup>nd</sup> largest export destination in the world and ranks as the 42<sup>nd</sup> largest source of imports into Canada.

The two most significant trends affecting the consumer market are the ageing population and a rise in dual-income households. These shifts, along with increasingly busy lifestyles and health consciousness are all impacting consumption and the retail and foodservice industries, creating opportunities for agri-food exporters.

### Canada - Colombia Relations

Colombia is Canada's 4<sup>th</sup> largest export market in South America after Brazil, Venezuela and Chile, and 6<sup>th</sup> largest trading partner in Latin America and the Caribbean (excluding Mexico). Imports into Colombia are very diverse, creating many opportunities for Canadian exporters.

In 2009, Canadian Foreign Direct Investment (FDI) in Colombia totalled \$773 million; a decrease from the previous year of 25.1% likely due to the recession. FDI from Colombia in Canada is \$1 million which remained unchanged from 2008. Aside from mining, oil and gas exploration, and production, Canadian companies have invested in agri-food, pulp and paper, printing, forestry, education, plastics and shoe manufacturing. Very high profile Canadian companies are active in Colombia such as TransCanada Pipelines and Bata Footwear. Key Canadian investment is represented by companies such as McCain Foods.

Canada's relationship with Colombia is amicable and was boosted by the signing of the new historic Canada-Colombia FTA signed on November 21, 2008. This allowed Canadian businesses open market access to Colombia and provided greater access for exporters of products such as wheat, pulses, barley, paper products and heavy equipment. The FTA also provides greater stability for Canadian companies involved in manufacturing, oil and gas and mining. A reduction in Colombia's tariffs enhances trade opportunities in products of export interest to Canadian agricultural and industrial producers. Lower tariffs contribute to enhancing the competitive position of Canadian exports in Colombian markets.

<b>Canada-Colombia Bilateral Trade (2010)</b>	
<b>Colombia Total Trade</b>	<b>\$82.6 billion</b>
Exports	\$40.7 billion
Imports	\$41.9 billion
Trade balance	(\$1.2 billion)
<b>Canada-Colombia Trade</b>	<b>\$1.4 billion</b>
Exports	\$643.8 million
Imports	\$717.4 million
Trade balance	(\$73.6 million)
<b>Canada-Colombia Ag Trade</b>	<b>\$639.0 million</b>
Exports	\$276.8 million
Imports	\$359.2 million
Trade balance	(\$82.4 million)

- In 2009, Canada's exports to Colombia totalled \$601.7 million, down from \$708.8 million in 2008. This was largely due to the economic down turn. Prior to the recession, Canadian exports saw a steady increase from 2004-2008. In 2010, exports increased to \$643.8 million.
- Canada's largest exports included meslin and wheat, lentils, newsprint in rolls or sheets, vehicles (dumpers), and barley.
- Canada's imports from Colombia increased from \$638.7 million in

2008 to \$733.6 million in 2009 but declined slightly in 2010 to \$717.4 million.

- Imports primarily consisted of coffee, crude petroleum oils, bananas, coal and cut flowers.

## Agricultural Trade

Canada has traditionally held an agri-food trade deficit with Colombia. Colombia ranks 12<sup>th</sup> among Canada's top 20 agri-food import sources and Colombia is Canada's 22<sup>nd</sup> largest export market. In 2010, Canadian agri-food exports grew to \$276.8 million from \$249 million in 2009. With Colombia's growing agri-food industry, Canadian agri-food exporters have been quick to respond, successfully claiming a segment of the market for their products. In addition to a thriving agricultural sector that makes up approximately 18% of Colombia's economy, the country also has a major food processing sector which accounts for 27% of the manufacturing industry. Valued at 9.3% of Colombia's GDP, the agri-food sector is an important part of the Colombian economy.

In 2010, Canada's top agricultural exports to Colombia were grains and pulses. Specifically, top agri-food products were wheat, lentils, barley, and peas; however, there is a growing market for processed foods and value-added products. New opportunities are potentially available for exporters of beef, pork, liquors, animal feed and non-tropical fruits. Canada's top agricultural imports from Colombia were coffee, bananas and cut flowers.

<b>Canada's Top 5 Agricultural Exports to Colombia (2010)</b>	
Wheat and Meslin	\$127.9 million
Lentils, dried, shelled	\$61.4 million
Barley	\$23.0 million
Peas, dried, shelled	\$10.2 million
Canary seed	\$7.8 million

- Wheat and meslin, dried and shelled lentils, barley, canary seed, and dried and shelled peas have remained in Canada's top five exports to Colombia consistently over the past four years.

<b>Canada's Top 5 Agricultural Imports from Colombia (2010)</b>	
Coffee, not roasted, not decaffeinated	\$162.0 million
Bananas	\$80.8 million
Cut Roses	\$24.4 million
Cut Flowers	\$21.6 million
Cut Carnations	\$14.4 million

considerably more on the horticultural side, including more plants and cut flowers.

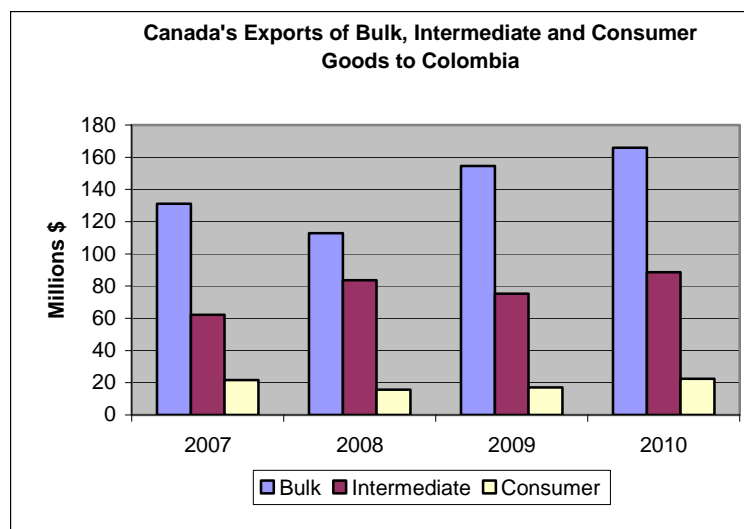
- Canada's top five agri-food exports account for a full 83.2% of Canada's agricultural exports to Colombia in 2010.
- Canada's exports have remained fairly stable but did experience a \$3 million decrease between 2007 and 2008. Canadian exports saw an increase of \$35 million in 2009, and an increase of \$29.9 million in 2010.

- Canada's top five agri-food imports from Colombia represent 84.4% of total agricultural imports.
- From 2007-2008, total agri-food imports from Colombia increased by \$19 million and increased a further \$49 million in 2009. In 2010 imports increased 13.8 million.
- Imports from Colombia, compared to exports from Canada, are

Complete statistical summary available: [www.ats-sea.agr.gc.ca/stats/da-do-eng.htm](http://www.ats-sea.agr.gc.ca/stats/da-do-eng.htm)

### **Canada – Colombia bulk, intermediate and consumer exports/imports:**

- In 2010, Canada's bulk exports to Colombia were \$165.8 million or 60% of all Canadian agri-food exports. The top five bulk exports were: wheat and meslin, barley, canary seed, durum wheat, and linseed.
- Intermediate exports were \$88.6 million or 32% of all Canadian agri-food exports. The top five intermediate exports were: lentils dried and shelled, peas dried and shelled, bovine, sheep and goat fats, canola, chick peas dried and shelled.
- Consumer-oriented exports were \$22.4 million or 8.1% of all Canadian agri-food exports. The top five consumer exports were: food preparations, margarine, swine cuts, chicken and capon cuts and edible offal, and non-alcoholic beverages.
- In 2010, Canada's bulk imports from Colombia were \$184.8 million or 51.4% of all Canadian agri-food imports. The top five bulk imports were: coffee not roasted and non-decaffeinated, refined sugar, coffee not roasted and decaffeinated, cocoa beans, and coffee roasted and not decaffeinated.
- Intermediate imports were \$6.2 million or 1.7% of all Canadian agri-food imports. The top five intermediate imports were: gelatin, plants, glucose and glucose syrup, animal products, and spices.
- Consumer-oriented imports were \$168.2 million or 46.8% of all Canadian agri-food imports. The top five consumer imports were: bananas including plantains, cut roses and rose buds, other cut flowers and flower buds, cut carnations and carnation buds, and cut chrysanthemums and chrysanthemum buds.



### **Economy**

Colombia experienced accelerated growth between 2002 and 2007; however, Colombia's infrastructure requires major improvements to sustain economic expansion. Colombia's economy grew only 2.6% in 2008 and contracted slightly in 2009, due to the global recession and a weakening demand for Colombian exports. As a result, the government cut capital controls and promoted investment incentives,

such as Colombia's free trade zone mechanism, and new bilateral investment treaties and trade agreements.

The expansion of banking and financial services will have a significant impact on the economic dynamics of Colombia. Rising incomes, and the wider availability of loans and credit, will drive up consumer spending. This will affect goods such as cars, appliances, durable goods, clothes and footwear. It will also mean greater spending on activities such as eating out, night-time entertainment and travelling, which are usually financed through credit card payments.

Colombia's top export is oil (closely followed by coal and coffee) as the country is rich in natural resources such as oil, coal, gold, silver, copper, nickel and iron ore.

<b>Gross Domestic Product (2010)</b>	
GDP	US\$283.1 billion
GDP (PPP)	US\$429.9 billion
Real GDP growth	0.8% 2009 4.7 % 2010
GDP/capita	US\$6,211
GDP/capita (PPP)	US\$9,445

Current:

- Colombia's exports were valued at \$36.8 billion in 2009, down sharply over 2008's total of \$39.4 billion. This was largely attributed to the global recession.
- Colombia's primary export commodities include: petroleum, coffee, coal, nickel, emeralds, apparel, bananas and cut flowers.
- Colombia's total imports were valued at \$37.0 billion in 2009, representing a \$4.7 billion decline from 2008's figure of \$41.7 billion.
- Colombia's largest import commodities include; industrial equipment, transportation equipment, consumer goods, chemicals, paper products, fuels and electricity.
- Colombia's GDP is ranked as the 28<sup>th</sup> highest in the world.
- In 2010, GDP composition by sector was: agriculture at 9.3%, industry with 38.0%, and services representing 52.7%.

Forecast:

- Inflation was 4.2% in 2009 and decreased to 2.4% at the end of 2010 and is expected to slightly increase in 2011 to 2.6%.
- After real GDP growth of 0.8% in 2009, growth increased to 4.7% at the end of 2010 and is expected to decrease slightly to 4.6% in 2011.
- Goods and services exports were 16.4% of GDP in 2009 and decreased by the end of 2010 to 15.7%. The forecast is that in 2011, goods and services exports will decline slightly to 15.1%.

### **Consumer Market**

The Colombian consumer base is drawn from a population of 46 million. While this is a relatively large consumer base, the market does enjoy the benefits of being very concentrated and compact. Areas of Colombia that are considered to be the most densely populated are: Bogota, Cali, Medellin, Barranquilla, and Cartagena. The major urban centres are more likely to have a higher concentration of dual income households, providing more export opportunities for Canadian companies in the domain of luxury food items, and organic foods. Due to the busier lifestyles in the urban centres, ready-made meals and time-saving food preparations could also be

key Canadian exports to Colombia.

The ageing population is one of Colombia's most significant trends. With improving healthcare services and products, as well as medical advances in Colombia, the inhabitants are living longer. While this may cause increased financial burden on the country's healthcare sector due to an increase in age-related medical issues. By contrast, it will provide opportunities for products that cater to these consumers.

The number of dual-income households is increasing and at the same time the birth rate is in a steady decline. This can be attributed to the fact that many women are deciding to enter the workforce right away; getting married and having children at a later date. Many young families are deciding not to have children at all or fewer of them. This may provide the development of a much wealthier middle class and in turn opportunities for luxury or imported food products.

Colombians consider lunch to be the most important meal of the day. A typical Colombian lunch starts with soup or fruit as an appetizer followed by a main course of meat or chicken and at least two portions of carbohydrates such as rice, potatoes or plantains. Fruit juices are usually consumed with lunch and desserts are also eaten. However, many Colombians have now diversified their diets. Instead of eating the traditional lunch, many prefer to consume lighter portions or other foods such as sandwiches, pizzas and ready-made salads.

The number of restaurants offering healthy lunch options has increased in the past few years, as Colombians have become more aware of the benefits of adopting a healthier lifestyle. There are differences in eating habits among the social classes in Colombia. People from higher socio-economic groups can afford to buy healthier and better quality foods, such as better quality beef, fish and larger quantities of vegetables; while people in the lower socio-economic groups consume more starches and lower quality fats.

- Older consumers will drive the sales of products such as vitamins, medical supplies, healthy foods, exercise and sporting equipment while seniors are trying to keep fit and active while they move towards a healthier lifestyle.
- Many Colombians cook their own meals at home because it is cheaper than eating out. However, the increase in dual-income households will drive sales in convenience food items such as frozen foods, since making meals from scratch can take quite some time. This means that the more traditional recipes are giving way to practical convenience foods; as a result, microwavable and canned products have seen a gradual increase in the Colombian market.
- Household products such as microwave ovens, freezers and dishwashers are expected to increase as well, as busier lifestyles drive the need for convenience.
- Due to changes in demographics and consumer preferences, there is a greater need for healthier and higher quality food. These preferences are becoming key drivers in the evolving Colombian food market.
- Although families with young children only comprise a small portion of the Colombian consumer landscape, they are driving trends towards fresh and organic foods. Overall, these consumers have increased health awareness and have developed new preferences for functional, low-fat and organic foods.
- The Colombian consumer market is expected to see an increase in sales for

- healthy foods such as fish, yogurt, fruits and vegetables while the sales of the less healthy foods like fats and oils will decline.
- Overall the consumption of fruit juices has increased while the consumption of carbonated soft drinks has declined. Many Colombians are shifting towards the healthier drinks, favouring natural beverages over those with artificial flavours and colours.
  - Colombia has seen a large increase of new supermarkets as well as the older traditional style markets.

### ***Opportunities***

The Canadian Trade Commissioner Service has listed Agriculture, Food and Beverages as a top priority sector in Columbia for Canada, followed by Metals, Minerals & Related Equipment, Services & Technology, and Oil & Gas Equipment & Services.

The U.S. Department of Commerce cited significant export opportunities in wheat, corn soy products, cotton, and food and beverage processing and packaging equipment.

### **Competitors**

In terms of competition, the U.S. is Canada's largest competitor. The U.S. is considered Colombia's most important trading partner with almost 40% of Columbia's exports destined for the U.S., and almost 30% of Colombia's imports coming from the U.S. The U.S. is the biggest exporter of consumer-oriented food to Colombia and American products are highly regarded for their quality and variety.

Colombia's largest import suppliers include: the U.S. which accounts for 28.9% of all imports, China at 11.3%, and Mexico at 7%. Colombia's largest export markets are: the U.S. representing 39.9% of Colombia's exports, Venezuela at 12.3%, and the Netherlands at 4.1%.

A U.S.-Colombia Trade Promotion Agreement (CTPA) achieves two key objectives for the United States: 1) it makes agricultural trade a two-way street and 2) it levels the playing field with respect to third country competitors in the Colombian market. Under the CTPA, Colombia will eliminate its price band system, which affects over 150 agricultural products. As a result, the U.S. will have greater market access and the elimination of tariffs. However, Colombia also relies heavily on the trade with its neighbours, especially Bolivia, Ecuador, and Peru, which are members of the Andean Community. With the cooperation agreement between the Andean Community and Mercosur, the Andean Community gained four new associate members: Argentina, Uruguay, Paraguay, and Brazil.

### **Access Issues**

Colombia is a member of the World Trade Organization, Andean Community, Latin America Integration Association, G-3 and Caricom.

The Canada-Colombia Free Trade Agreement (FTA), signed November 21, 2008, has helped level the playing field for Canadian businesses. With this new secure and predictable environment for investors, there are now lower prices and increased choice for consumers. The FTA secures bilateral investment which in turn

strengthens the economic ties between Colombia and Canada, thus encouraging bilateral trade.

Colombia maintains a tariff of 16.6% on agricultural products. Lower tariffs for Canadians will help to enhance the competitive position of Canadian exports in Colombian markets, and create opportunities for agricultural exports such as: beef, pork, wheat, barley and pulses, and non-tropical fruits such as apples, peaches and berries. Canada has placed an emphasis on faster tariff elimination for products that are of the highest importance to Canadian industry, such as Canada's main agricultural exports to Colombia.

A greater concern for exporters is non-tariff barriers to trade, such as those that address regulations, safety and hygiene standards, and technical conformity. Some other barriers include import licenses for many agricultural products. Although most are automatically issued, the ministry of agriculture has the right to revoke approved licenses if the domestic market is oversupplied.

Additional information on trade barriers can be found at Canada's International Market Access Report (CIMAR) database:

[w01.international.gc.ca/CIMAR-RCAMI/index.aspx](http://w01.international.gc.ca/CIMAR-RCAMI/index.aspx)

### **Business Travel Tips**

Colombians are hardworking and friendly people. Building personal relationships is a must. Colombians share similar business practices with those from North America. Colombia has a well-established business community and first-time business visitors will be pleased at the modern business environment and solid infrastructure in place. However, Spanish is the official language and it is best to hire an interpreter if your Spanish is limited as some people do not speak English.

Working breakfasts and lunches, cocktails, and receptions are normal, although less formal. Business attire is expected. Normal working hours are Monday to Friday from around 8:00am to 5:00pm. However, business visitors should be aware of the Colombian calendar when scheduling an appointment. For example, Holy Week (the week before Easter) is not an advisable time to do business.

Most business visitors stay in the urban cities, unless they have to make trips to mining and oil sites, as some areas are considered dangerous. It is best to hire a driver and vehicle. Ensure that you only ride "radio taxis", which your hotel can request. Never hail taxis in the street and never share a taxi with a stranger.

For more business and travel tips regarding Colombia, please visit the Department of Foreign Affairs and International Trade Canada's Travel Report for Colombia:

[www.voyage.gc.ca/countries\\_pays/report\\_rapport-eng.asp?id=60000](http://www.voyage.gc.ca/countries_pays/report_rapport-eng.asp?id=60000)

For more business tips on how to assess market potential in Colombia, please visit the Department of Foreign Affairs and International Trade Canada:

[www.tradecommissioner.gc.ca/eng/assess-market-potential.jsp](http://www.tradecommissioner.gc.ca/eng/assess-market-potential.jsp)

## **Agriculture Sector & Policies**

Agriculture contributes to roughly 10% of overall GDP. Around 40% of the country's land is used for agriculture, and a little over 17% of the workforce is employed in the agricultural sector. There have been recent problems farming land due to the overuse of pesticides, over-farming and water contamination. Major agriculture products are coffee, cut flowers, bananas, rice, tobacco, corn, sugarcane, cocoa beans, oilseed, vegetables, shrimp, and forest products. Colombia is also the third largest grower of bananas in the world.

Agri-business presents many opportunities for Canadian companies as Colombian growers seek agriculture expertise and new farm technology. Plant and animal science, such as genetics, is also needed for livestock breeding and tackling crop diseases. The agri-food and processed food sector has seen solid growth since the 1990s due to rapid urbanization and a demand for convenient, processed food. There is major demand for poultry, beef, pork, beer, snacks, eggs, fresh fruit and cereals. Although there is a local processed food sector, most of the supply comes from imported sources.

The Andean Community that Colombia is a part of, established The Common Agricultural Policy (CAP) to streamline the agriculture sector and make it more competitive. The result is a common market and standardized export policy, as well as harmonized food safety standards. These developments ensure a smooth supply chain between Andean countries and a price band for selected commodities.

For more information on the Andean Community, please visit the Agri-Food Trade Service's Agri-Food Regional Profile on the Andean Community (Bolivia, Colombia, Ecuador, Peru): [www.ats-sea.agr.gc.ca/lat/4326-eng.htm](http://www.ats-sea.agr.gc.ca/lat/4326-eng.htm)

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## Key Resources

Colombia at a Glance – ATS – 2009

<http://www.ats-sea.agr.gc.ca/stats/5163-eng.htm>

Colombia – Import, Export and Trade Information – Global Trade Atlas – 2009

<http://www.gtis.com/gta/secure/gateway.cfm>

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[http://www.voyage.gc.ca/countries\\_pays/report\\_rapport-eng.asp?id=60000](http://www.voyage.gc.ca/countries_pays/report_rapport-eng.asp?id=60000)