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Prepared By: Alvaro Ortega

Approved By: Rachel Nelson

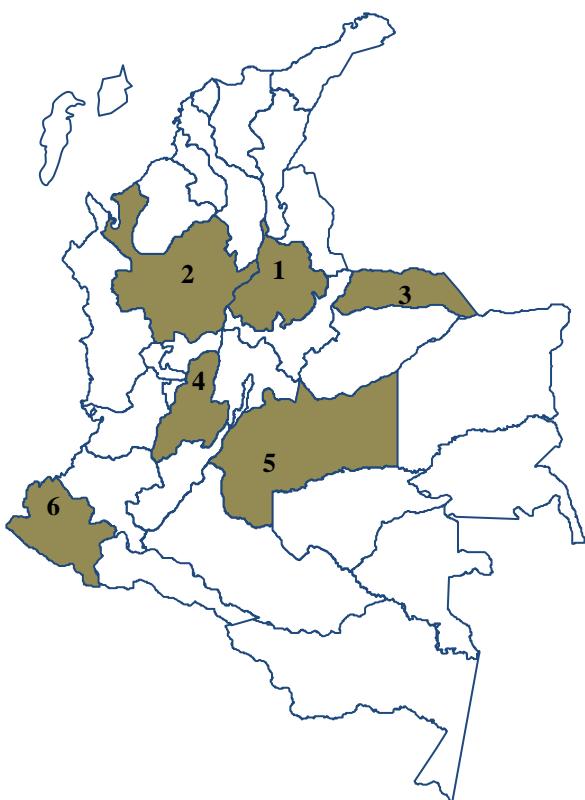
Report Highlights:

Colombia is the tenth largest producer of cacao globally. In 2024 Colombia produced 67,700 metric tons (MT) of cacao on a planted area of 200,000 hectares. Following two years of export declines, 2024 Colombian exports increased to 42,100 MT of cacao and derived products. The top five importers of Colombian cacao last year were the United States, Ecuador, Mexico, Venezuela, and Chile. Although Colombian cacao exports to the United States have risen 43 percent since 2023, reaching 8,683 metric tons, Colombia remains the 22nd largest supplier for the United States.

Colombian Cocoa Production

In 2024 Colombia ranked as the tenth largest producer of cacao¹ (also known as cocoa) cultivating the crop on 200,000 hectares (ha), far below the 7.3 million hectares identified by UPRA as having high potential for cacao production in Colombia. This highlights that there are still significant untapped opportunities for expansion. About 93 percent of cacao producers are smallholder farmers, averaging less than 4 ha in size. Cacao yields remain relatively low in Colombia, ranging between 0.45-0.46 ton per hectare. Santander Department is Colombia's primary cacao producing region, accounting for 41 percent of total production. Other departments with significant cocoa production include Antioquia, Arauca, Tolima, Meta and Nariño (Figure 1). Colombia produces cacao year-round, with two main seasons. These are the *principal* season, which runs from October to January, and the *Mitaca* season, which runs from May to June.

Figure 1. Main Colombian Cocoa Producing Departments with 2024 Production (MT)



Region	2024 Cocoa Production	% Total Cocoa Production In 2024
Santander (1)	28,044	41
Antioquia(2)	7,154	11
Arauca(3)	6,993	10
Tolima(4)	3,732	6
Meta(5)	3,104	5
Nariño(6)	3,081	5
All Others	15,570	22
Total	67,678	100

Data source: Colombian Ministry of Agriculture and Rural Development, National Association of Cacao Producers (Fedecacao).

Colombia is a major producer of high-quality, fine flavor cacao, with the majority of production focused on the *Criollo* and *Trinitario* hybrid varieties. Both varieties are commonly associated with fine flavor cacao, which is defined by the International Cocoa Association (ICCO) using on a variety of

¹ Source: International Cocoa Organization (ICCO).

characteristics² including the genetics of the materials planted, growing conditions, and how the cacao is processed. According to ICCO, approximately 80 percent of Colombia's cacao production is classified as fine-flavored, offering significant export opportunities due to growing demand.

Figure 2: Producing countries exporting either exclusively or partially fine or flavor cocoa

Countries	Council decision April 2024
Indonesia	10%
Haiti	10%
Dominican Republic	60%
Peru	75%
Ecuador	75%
Vietnam	80%
Papua New Guinea	80%
Nicaragua	80%
Colombia	80%
Trinidad and Tobago	100%
Madagascar	100%
Jamaica	100%
Grenada	100%
El Salvador	100%
Costa Rica	100%
Brazil	100%

source:ICCO

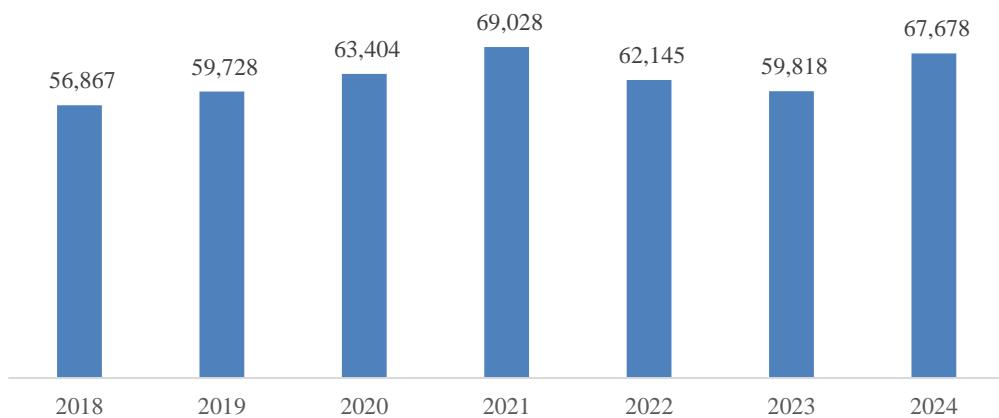
After consistent growth from 2018 to 2021, production experienced declines in 2022 and 2023, decreasing by 10% and 4%, respectively. This downturn was primarily caused by prolonged periods of rain, which disrupted flowering and fertilization. However, in 2024, production rebounded, increasing by 13% compared to 2023. This recovery was driven by planting renewals, the adoption of new technologies, and improved agricultural practices. (Figure 3).³ A common disease among cacao

² The ICCO definition of Fine flavor cocoa is stipulated in Article 2.2. of the International Cocoa Agreement 2010 (Ammended): Fine flavour cocoa is cocoa characterized by a complex sensory profile, composed of well-balanced basic attributes with aromatic and flavour notes; the complementary attributes can be clearly perceived and identified in the expression of its aromas and flavours; it results from the interaction between (a) a particular genetic composition, (b) favourable growing conditions in a given environment/terroir, (c) specific plantation management techniques, (d) specific harvesting and post-harvest practices and (e) stable chemical and physical composition, and integrity of the bean.

³ Favorable cacao prices led to producers increasing their on-farm investments, including new cacao cultivation.

producers is Frosty pod rot (*Moniliophthora roreri*), which remains the main constraint for cacao producers, affecting up to 40 percent when it occurs.

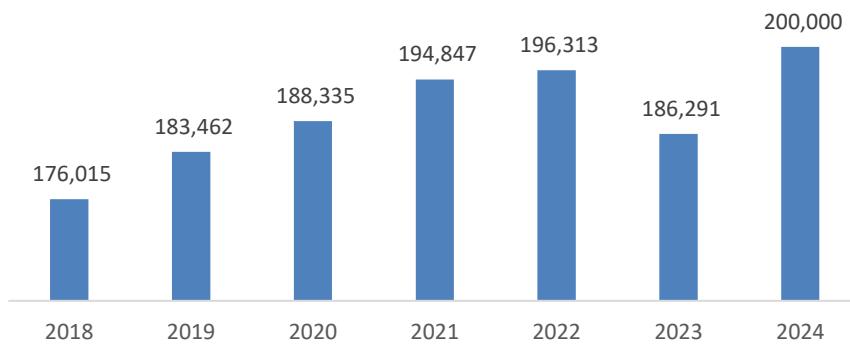
Figure 3. Colombian Cocoa Production 2018–2024 (MT)



Data source: Colombian Ministry of Agriculture and Rural Development (MADR)

The planted area of cacao in Colombia increased in 2024 due to several factors like high international prices driven by cocoa shortages in Africa, farmers' efforts to diversify by shifting from coffee to cocoa in response to climate change, and investments in technology and technical support.

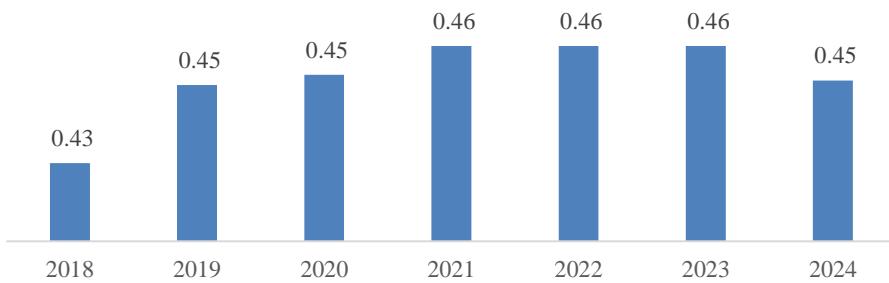
Figure 4: Colombia: Cacao Planted Area, 2018-2024 (ha)



Data source: MADR.

Over the past five years, Colombia's cacao production has remained mostly unchanged, with yields totaling 0.45 MT/ha in 2024 (Figure 5). Productivity remains unchanged, primarily due to the fact that 40% of the plantations are in a non-productive state and there is still a low adoption of good agricultural practices, which exacerbates the widespread presence of phytosanitary issues.

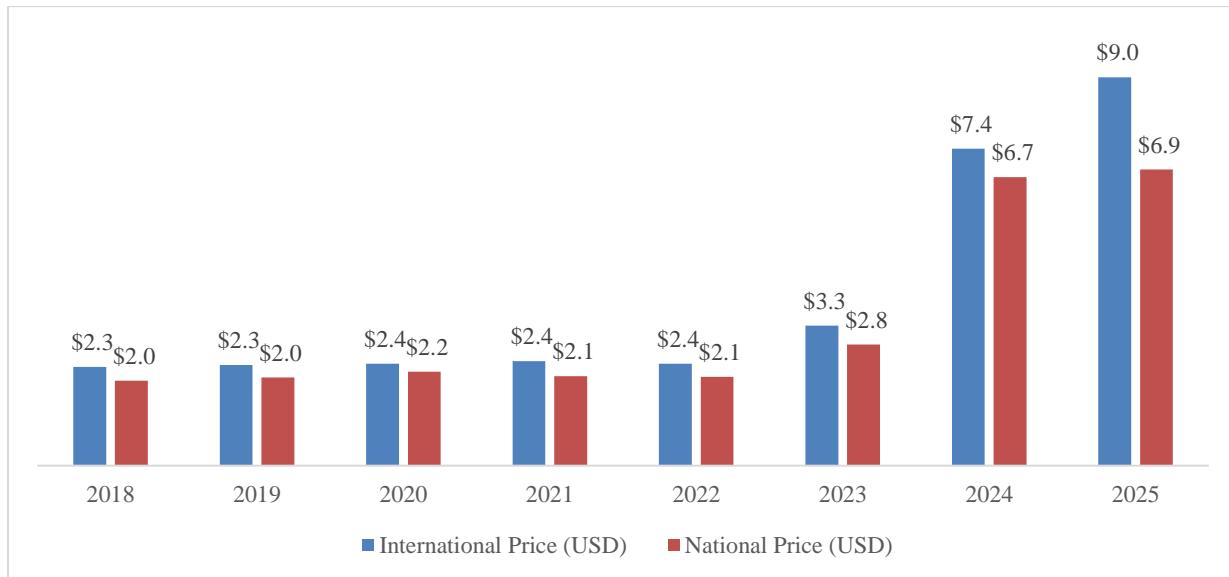
Figure 5. Colombian Cacao Yields (All Regions), 2018-2024 (MT/ha)



Data source: MADR, Fedecacao.

In 2024, Colombia's domestic cacao prices experienced a slight increase, driven by higher international cacao prices.⁴ However, the rise was less pronounced due to the sector's significant reliance on domestic consumption and limited export activity (Figure 6). High national and international prices for cacao have helped off-set rising production costs, particularly in inputs and labor. According to MADR data, the cost of planting 1 ha of cacao is estimated at USD \$4,916. Two years ago, the cost was estimated at USD \$3,252, reflecting increasing cost of inputs and labor.

Figure 6: Cacao National Price Paid to Farmer vs. International Price (USD per kg)



Data source: FEDECACAO.

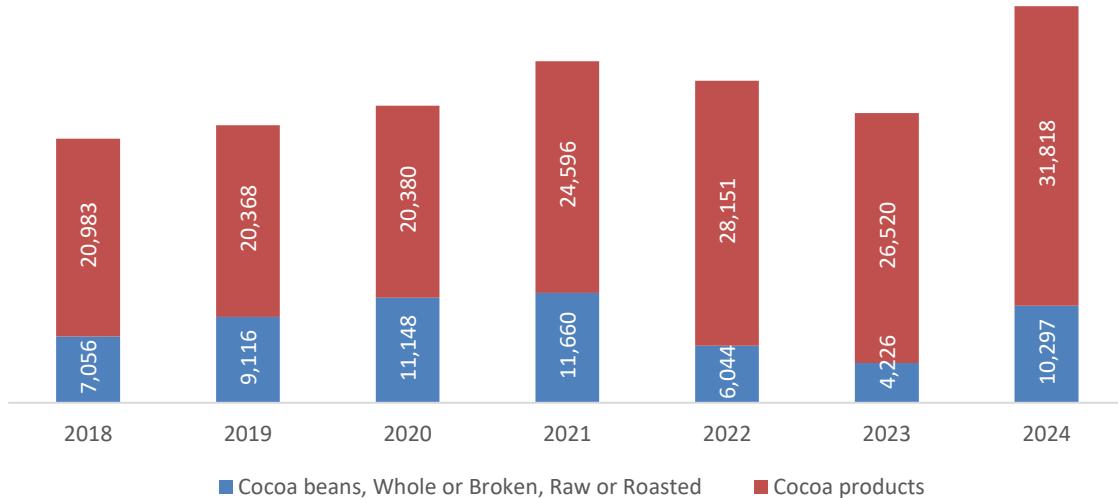
⁴ Cacao prices skyrocketed in this period due to decreased production in Côte d'Ivoire and Ghana, the two largest global cacao producers.

Colombian Cocoa Trade

Colombia exports cacao and its derivative products to more than 70 countries worldwide. In 2024, the country exported 42,100 metric tons of raw cacao beans and related products (Figure 7). The United States, Ecuador, Venezuela, Mexico, and Chile were the top five destinations, collectively accounting for 61 percent of Colombia's cacao exports. Cartagena serves as the primary port for these exports, with smaller shipments departing from Santa Marta.

Although Colombian cacao exports to the United States have risen 43% since 2023, reaching 8,683 metric tons, Colombia remains the United States' 22nd largest supplier.

Figure 7. Colombian Exports of Cocoa Beans and Processed Cocoa Products and Derivatives 2018-2024 (MT)



In 2024, Colombia exported 31,800 MT of processed cacao-related products, valued at approximately \$200 million—a 20 percent increase from 2023 figures. These products included cacao butter, paste, powder, and chocolate. The primary export destinations were the United States (\$62.4 million), Ecuador (\$19.7 million), Venezuela (\$13.5 million), Mexico (\$13.7 million), and Chile (\$8.1 million) (Table 1).

The main cocoa-derived products exported by Colombia are chocolates, accounting for more than 50% of total exports. This growth is driven by the diversification of companies and the decline in global production from other countries. Additionally, cocoa butter exports represent 11%, serving as an intermediate product used in chocolate confectionary production.

Table 1. Top 10 Colombian Cocoa Export Destinations in 2024 and percentage change 2023-2024 (MT)

	2023	2024	% Change 2023-2024	Primary cocoa products imported in 2024(% of imports by product)
United States	6,086	8,683	42.7	Chocolate products (69%) Cocoa butter (25.3%) Cocoa beans (2.6%)
Mexico	3,767	7,642	102.9	Cocoa beans (74.3%) Chocolate products (15.1%) Cocoa powder (0.4%)
Ecuador	4,131	4,177	1.1	Chocolate products (85.5%) Cocoa powder (13.9%)
Venezuela	2,457	3,223	31.2	Chocolate products (100%)
Costa Rica	1,274	1,948	52.9	Chocolate products (34.3%) Cocoa paste (23.2%) Cocoa powder (23.2%)
Belgium	1,611	1,742	8.1	Cocoa beans (86.1%) Chocolate products (11.6%)
Chile	1,614	1,710	5.9	Chocolate products (96.1%) Cocoa paste (1.5%)
Peru	1,197	1,569	31.1	Chocolate products (94.5%) Cocoa paste (3.8%)
Malaysia	100	1,224	1124	Cocoa beans (100%)
Panama	889	1,187	33.5	Chocolate products (87.5%) Cocoa powder (9.9%)

Data source: Trade Data Monitor.

In 2024 Colombian exports of cacao beans increased to 10,200 MT, more than double the amount in 2023, representing \$65 million in value representing and an estimated 14 percent of its total production. Much of this increase is because higher demand and lower production in Africa created opportunities for Colombia cacao. Coffee companies also participated more in the exportation of cacao, using their knowledge in distribution and commercialization. Top export destinations in 2024 for cacao beans included Mexico (\$31.8 million), Belgium (\$9.4 million), the United States (\$1.3 million), and Japan (\$400,000).

Consumption

The majority of Colombia's cacao production is consumed domestically, where it is enjoyed in various forms, such as a traditional "chocolate de taza" hot beverage and a range of confectionery products. This supports an average chocolate consumption of nearly 1 kg capita annually, significantly lower than other regions including the United States, where per capita consumption reaches approximately 4.5 kg per year. Despite widespread availability of chocolate products in Colombia, recent domestic food

regulations, including a tax on ultra-processed products introduced under Colombian Law 2277 of 2022, have contributed to a decline in the consumption of sugar-added products, including those containing cacao as an ingredient.⁵

Cacao Organizations in Colombia

The two government agencies overseeing the cacao sector in Colombia are the Ministry of Commerce, Industry and Tourism (MINCIT) and the Ministry of Agriculture and Rural Development (MADR. The Ministry of Commerce promotes the economic development and business growth of the cacao sector and encourages foreign trade and investment, mainly through ProColombia that promotes tourism, foreign investment in Colombia, non-mining energy exports and the country's image. MADR formulates, coordinates, and evaluates agricultural policies with the goal of promoting the competitive, equitable, and sustainable development of the agricultural sector. The main MADR agencies supporting cacao include:

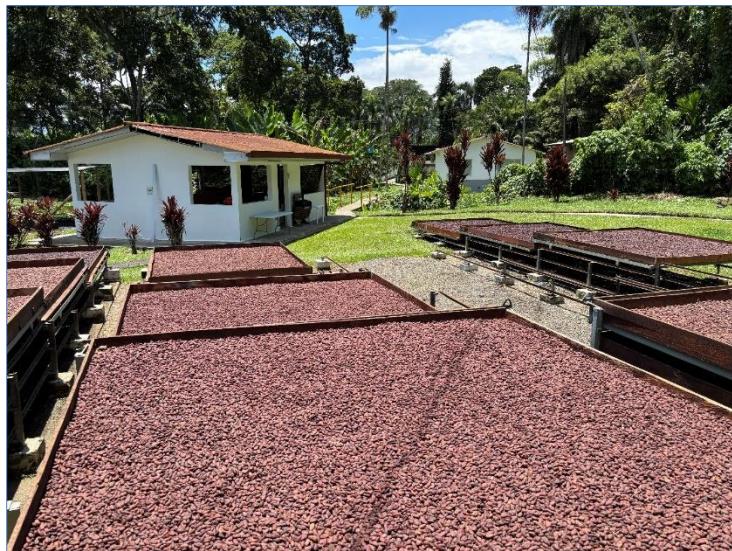
- The Colombian Corporation for Agricultural Research (AGROSAVIA) - leads cacao research, development and innovation and preserves genetic resources through the National Germplasm Collection
- The Rural and Agricultural Planning Unit (UPRA) - oversees public policy for the management of territories aiming to achieve productivity, competitiveness, land tenure, legal security, and efficient usage of rural soils
- Agricultural Colombian Institute (ICA) - the phytosanitary authority for cacao in Colombia
- Agricultural Sector Financing Fund (FINAGRO) - promotes the development of the rural sector with financing tools for stimulating investment
- The Agricultural Bank of Colombia (BANAGRARIO) - provides banking services to the rural sector. It offers services like financial solutions and loans for small and medium producers. Loans can be used for input acquisition, machinery and infrastructure.
- The Corporation Colombia International (CCI) - a nonprofit government institution that provides services to the agricultural sector for strengthening competitive and profitable agri-businesses

Fedecacao is a private, non-profit national association that represents the interests of 78% of cacao farmers in Colombia. Under the Cacao Development Quota, Colombian cacao farmers are required to pay a mandatory “parafiscal” contribution of 3 percent of the selling price for each kilogram of cacao they produce. Established by Law 67 of 1983, this fee applies to domestically produced cacao, including beans, nibs, broken cacao, cacao fruit pulp, and raisins. The association, FEDECACAO, is contracted by MADR to collect, administer, and invest the Cacao Development Quota funds into services for rural extension, research, and commercialization.

⁵ For more information on Colombina Law 2277 of 2022, see [FAS 2024 FAIRS Country Report](#).

There are two main Colombian multinational companies that dominate the processing and commercialization of cacao in Colombia: Grupo Nutresa (Compañía Nacional de Chocolates) and Casa Luker. These two companies are responsible for buying around 80 percent of Colombia's annual cacao production. These companies export cacao beans, transform cacao into derivative products for the national or international markets, and produce confectionery and food products for national consumption. According to FEDECACAO and the Colombian National Business Association, the number of companies processing cacao beans in Colombia has increased from 41 in 2010 to around 710 in 2024. The growing number of chocolate companies reflects a synergy between artisanal producers and multinational corporations. Artisanal producers are often located closer to cocoa growers, fostering direct relationships and sustainable practices. Meanwhile, multinational corporations invest heavily in research and development and possess resources to scale production and expand into global markets.

Figure 8: Cacao drying on Casa Luker, Caldas, Colombia



Data source: Post.

Fermentation plays a central role in the Competitiveness Agreement, a multi-agency initiative aimed at establishing production and export goals for Colombian cacao to reach by 2031. As part of the agreement's focus on sustainable production, post-harvest practices like fermentation and drying are prioritized to improve the quality of Colombian cacao and strengthen its position in global markets.

Challenges and Opportunities in the Colombian Cacao Sector

Tree Productivity

The productivity and quality of cacao trees are major challenges the Colombian cacao industry faces in improving production, profitability, and long-term sustainability. An estimated 40 percent of cacao farms are planted with trees that have unfavorable qualities such as old age, excess shade luminosity, and low tree density. In 2022, the MADR commissioned FEDECACAO to design and implement a

[National Cacao Renewal-Rehabilitation Plan](#), a multi-year initiative that supports cacao producers to utilize registered, improved cacao rootstock and increase Colombia's average plantation density from 700 trees per ha to 1,000 trees per hectare. MADR aims to introduce new genetic traits such as disease resistance, higher production, and bigger bean size. By 2030, the program's goal is to renew 30,000 hectares. According to Fedecacao, 2,700 hectares were renewed at the end of 2024.

Cadmium

Several policy changes within the European Union (EU) present potential challenges for Colombian cacao exports, which totaled \$31.8 million in 2024. Since January 2019, the EU has enforced Regulation No. 488/2014, which establishes maximum cadmium levels in cacao products ranging from 0.10 to 0.80 mg/kg, depending on the product type. In response, the Colombian government's Cacao Strategy includes a Food Safety Chapter focused on reducing cadmium contamination in the country's cacao production.

Cadmium, a toxic heavy metal, tends to accumulate in cacao plants and their beans, particularly in those grown in volcanic soils. In Colombia, certain regions are known to have higher levels of cadmium in cacao due to their unique soil composition. To address this issue, Colombia developed its first [cadmium cacao map](#), providing critical insights into regional variations and supporting efforts to manage cadmium levels in cacao production.

The EU Resolution 2023/1115 on deforestation introduces new requirements for Colombian cacao producers. Under the regulation, exporters of products classified as high-risk for deforestation, including cacao, must demonstrate that their goods are not sourced from recently deforested areas or production systems that contribute to forest degradation. According to FEDECACAO, over 90 percent of its affiliates are already georeferenced, a critical step toward meeting the EU's new compliance standards.

Attachments:

No Attachments.