Required Report: Required - Public Distribution **Date:** October 23, 2026

Report Number: CO2026-0027

Report Name: Grain and Feed Update

Country: Colombia

Post: Bogota

Report Category: Grain and Feed

Prepared By: Alvaro Ortega, Agricultural Specialist

Approved By: Mark Rosmann

Report Highlights:

In MY 2026/27, Colombia's corn and rice output is forecast to fall, driven mainly by El Niño and by low farmgate prices that have kept producers from expanding planted area. Imports, however, are projected to increase, supported by modest economic growth and competitive international prices. The United States is expected to remain the main supplier of corn and rice, benefiting from preferential access under the U.S.–Colombia Trade Promotion Agreement, while tariffs on Mercosur corn continue to affect regional competition. In the wheat market, Colombia remains almost entirely dependent on imports; Canada continues to be the leading supplier, although U.S. wheat is gaining market share due to competitive pricing and logistical advantages.

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT POLICY

Commodities:
Corn

Table 1. Corn: Production, Supply, and Distribution

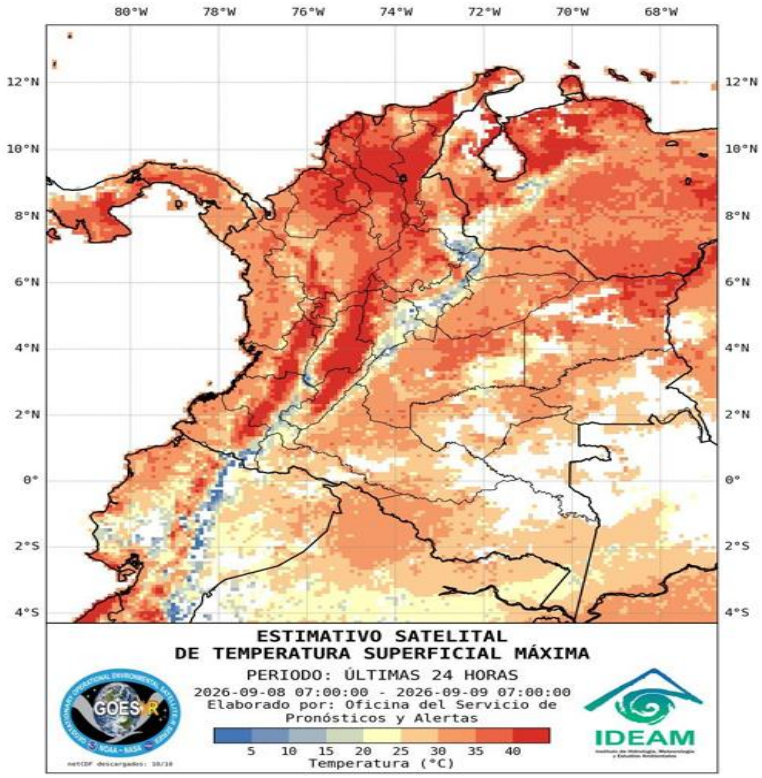
Corn	2024/2025		2025/2026		2026/2027	
Market Year Begins	Oct 2024		Oct 2025		Oct 2026	
Colombia	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	370	370	370	360	350	350
Beginning Stocks (1000 MT)	390	390	392	392	387	387
Production (1000 MT)	1500	1500	1550	1450	1400	1350
MY Imports (1000 MT)	7463	7463	8400	8200	8600	8300
TY Imports (1000 MT)	7463	7463	8400	8200	8600	8300
Total Supply (1000 MT)	9353	9353	10342	10042	10387	10037
MY Exports (1000 MT)	11	11	5	5	2	5
TY Exports (1000 MT)	11	11	5	5	2	5
Feed and Residual (1000 MT)	7350	7350	8350	8000	8400	8100
FSI Consumption (1000 MT)	1600	1600	1600	1650	1600	1660
Total Consumption (1000 MT)	8950	8950	9950	9650	10000	9760
Ending Stocks (1000 MT)	392	392	387	387	385	272
Total Distribution (1000 MT)	9353	9353	10342	10042	10387	10037
Yield (MT/HA)	4.0541	4.0541	4.1892	4.0278	4.000	3.8571
(1000 HA), (1000 MT), (MT/HA) MY = Marketing Year, begins with the month listed at the top of each column TY = Trade Year, which for Corn begins in October for all countries. TY 2026/2027 = Oct 2026 - Sept 2027						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Data source: FAS historical data series. Post estimates for MY 2026/2027.

Production

In MY 2026/27 (October–September), Colombian corn production is forecast to drop 6.9 percent from the revised MY 2025/26 estimate to 1.4 million metric tons (MMT), as El Niño brings higher temperatures and extreme heat waves that cause severe heat and water stress and sharply reduce yields. Temperatures above 32°C (90°F) negatively affect the fertilization process, while extreme heat above 35°C (95°F) reduces pollen production and can dry out the corn silk before fertilization occurs, resulting in empty kernels and incomplete or deformed ears (Figure 1).

Figure 1. Colombia: Satellite Estimate of Maximum Surface Temperature



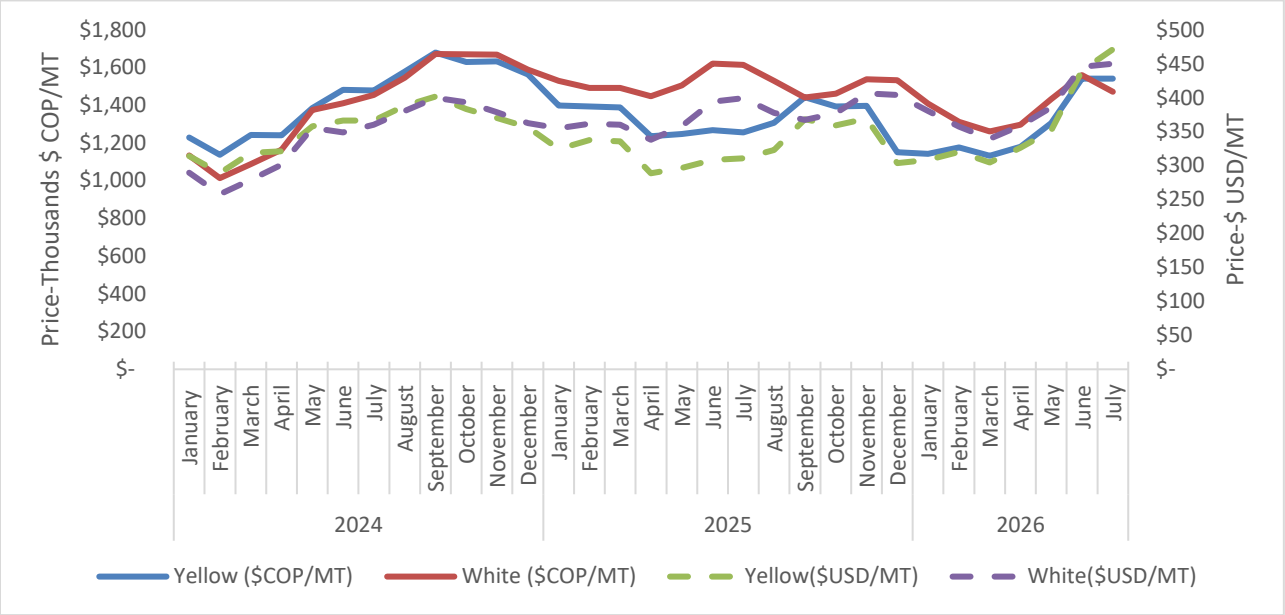
Data source: National Institute of Hydrology, Meteorology and Environmental Studies (IDEAM).

In Colombia, the impact of El Niño on corn is critical, since approximately 72 percent of the country's agriculture depends exclusively on rainfall, threatening yields in key producing regions such as the Eastern Plains (Llanos Orientales), the Caribbean region, and the Cauca Valley. In traditional rain-fed farming areas, the lack of water and elevated temperatures can ruin crops that were already ready for harvest or halt initial germination, while high temperatures accelerate the biological cycles of aggressive pests affecting corn, such as the fall armyworm (*Spodoptera frugiperda*) and the corn stalk borer.

Post revised its MY 2025/26 corn production estimate down to 1.5 MMT due to adverse weather throughout the year. In early 2026, an unusual cold front brought heavy rainfall to the Caribbean and Andean regions, especially the departments of Córdoba, Cundinamarca, and Tolima. A strong El Niño then set in starting in June 2026 and brought dry conditions through the second half of the year. Together, these events significantly reduced Colombian corn production.

Harvested area is projected to decrease to approximately 350,000 hectares (ha), as farmgate prices are not enough to justify expansion of planted areas (Figure 2) while yields are expected to decline slightly due to weather-related disruptions during recent planting cycles, primarily in Colombia's north coast.

Figure 2. Colombia: Domestic Average Monthly Corn Prices Paid to Producers Calendar Years (CY) 2024-2026, Thousand Colombian Pesos (COP)/Metric Ton (MT) and USD/MT

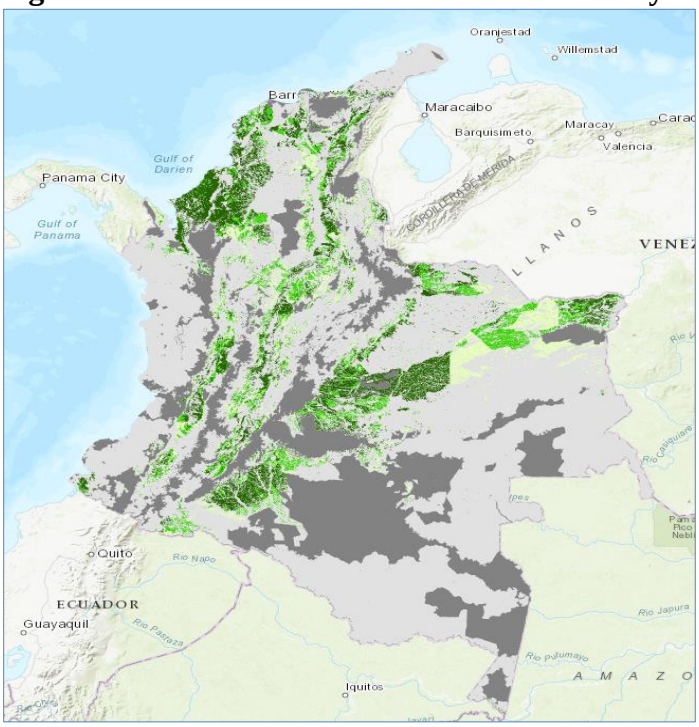


Data source: National Corn Producer Prices Report, Fenalce.
Note: U.S. dollar prices (USD) calculated using monthly average exchange rate from Banco de la República de Colombia.

In 2025, Colombia's corn output consisted primarily of yellow corn, representing about 70 percent of total production, followed by white corn at approximately 27 percent, while nearly 3 percent was destined for silage.[1] Commercial operations generate the majority of production, accounting for around 80 percent of output and roughly 60 percent of planted area, with average yields close to 5.7 MT/ha. In contrast, smaller, traditional subsistence farmers achieve yields near 2 MT/ha. Corn production is geographically concentrated, with roughly 70 percent of output originating in the departments of Córdoba, Sucre, and Bolívar on the northern coast; Tolima, Huila, and Valle del Cauca in the central region; and Meta in the eastern plains. The Agricultural Rural Planning Unit (UPRA)[2] has identified nearly 16 million ha in Colombia as suitable for corn cultivation (Figure 3); however, expansion remains limited due to infrastructure constraints, restricted access to agricultural inputs, and investment barriers, particularly in the eastern plains. Private sector initiatives[3] are underway to expand corn and soybean cultivation in the eastern plains; however, unresolved land tenure issues continue to pose a major constraint to investment.

[1] Source: Area and Production Statistics, Fenalce; published March 2026.
[2] Agency within the Ministry of Agricultural and Rural Development.
[3] One prominent investment is the *Soya-Maiz Proyecto Pais Initiative*, a program launched in 2020 to vastly scale planted areas of corn and soybean in the eastern plains region to build the domestic agricultural sector and substitute imports.

Figure 3. Colombia: Corn Production Suitability



Data Source: System for Rural Agricultural Planning (SIPRA), UPRA, March 2026.[4]

In 2025,[5] Colombia planted approximately 163,658 ha of genetically engineered (GE) corn, representing a 24 percent increase compared to 2024. The main GE-corn producing departments were Meta, Córdoba, Tolima, Valle del Cauca, and Cesar.

Consumption

In MY 2026/2027, corn consumption is forecast to increase to 9.76 MMT, supported by modest growth in the animal feed sector, while food, seed, and industrial (FSI) use remain stable. Per-capita FSI corn consumption is estimated at approximately 30 kilograms (kg). Feed demand is projected to reach 8.1 MMT, reflecting continued expansion in livestock production despite persistent inflation and moderate economic growth expected in 2026–2027.[6]

For MY 2025/2026, total corn consumption is revised upward to 9.65 MMT, primarily due to stronger feed demand. Lower international corn prices and a stronger Colombian peso reduced feed costs,[7]

[4] This map illustrates optimal areas for corn production for the second semester. The dark green illustrates the highly suitable land for corn production (8.2 million ha), medium green indicates moderately suitable (4.9 million ha), and light green corresponds to marginally suitable land (2.9 million ha). Light and dark grey areas are not suitable and are protected areas, respectively.

[5] Latest data available as of September 2026.

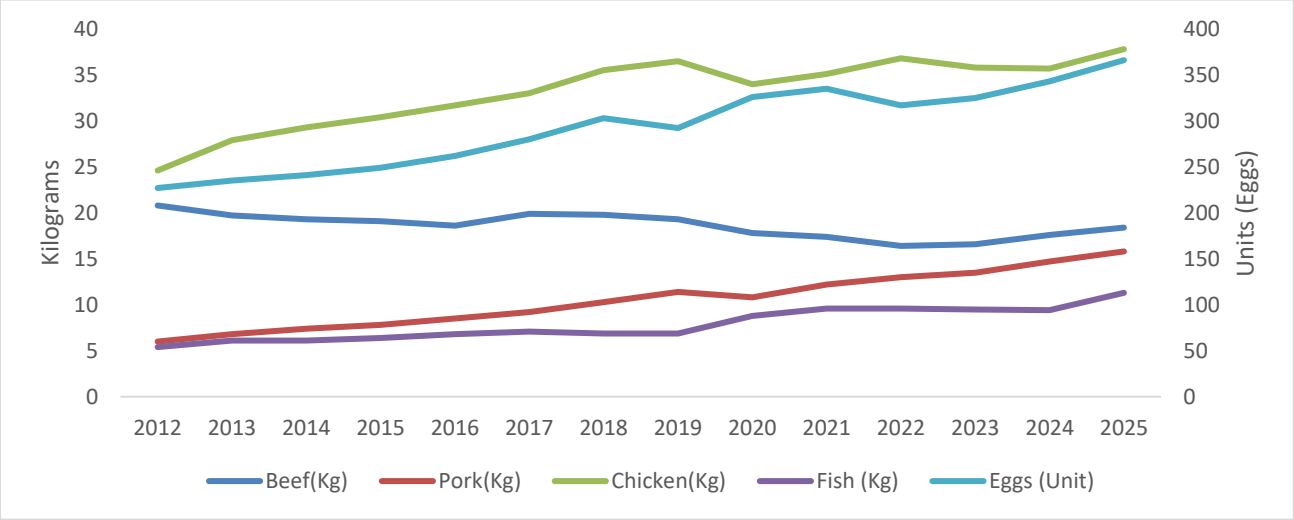
[6] According to Colombia's Central Bank January 2026 report, inflation is projected to rise to 6.3 percent in 2026 before declining to 3.7 percent in 2027, while economic growth is expected to moderate to 2.6 percent in 2026 and further slow to 1.6 percent in 2027.

[7] Feed formulation for pork ranges between 50-70 percent corn in the ration, which varies based on animal's diet and the type of production (e.g., finishing, lactation), in addition to current corn and soybean meal prices. Feed typically accounts for approximately 70 percent of total production costs.

supporting competitive prices for animal proteins and encouraging production growth in the poultry and pork sectors.

Yellow corn dominates domestic consumption because it is the primary ingredient in feed rations, while white corn is mainly used for food processing. Demand for feed grains continues to be driven by growth in animal protein consumption. Chicken remains the most widely consumed protein in Colombia, with per-capita consumption approaching 38 kg in 2025, followed by beef at about 18 kg and pork at roughly 16 kg per person. Pork consumption has grown steadily in recent years, while fish consumption remains comparatively low at around 11 kg per capita (Figure 4).

Figure 4. Colombia: Per Capita Animal Protein Consumption by Product (Kg and Units)



Data source: Colombia commodity producer associations including Fenavi (Poultry and Eggs), PorkColombia (Pork), Fedegan (Cattle), and Fedeacua (Aquaculture).

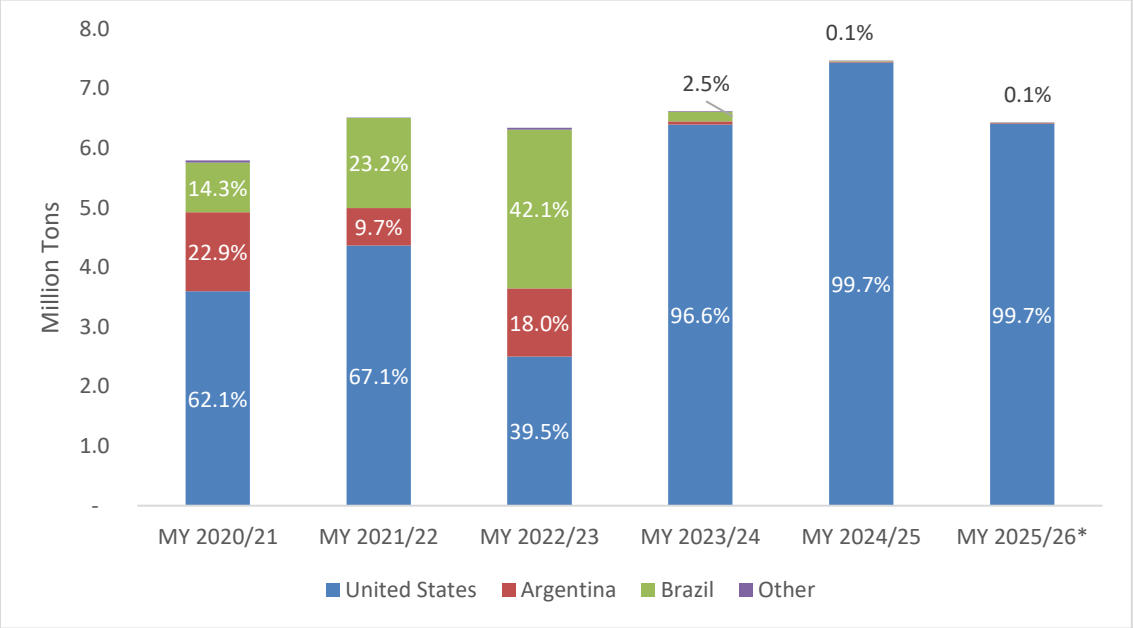
Trade

In MY 2026/27, corn imports are projected to reach 8.3 MMT, a 1.2 percent increase from the revised MY 2025/26 estimate, reflecting continued demand from the animal feed sector. U.S. corn is expected to retain a dominant share of the Colombian market, accounting for more than 95 percent of imports in both the current and forecast marketing years. This pattern is expected to persist while Mercosur tariffs remain in effect, and the U.S.-Colombia Trade Promotion Agreement (CTPA) continues to provide duty-free access for U.S. corn (see Policy section).

For MY 2025/2026, corn imports remain unchanged to 8.2 MMT due to strong demand from the feed industry. Import growth has been supported by lower international corn prices and the appreciation of the Colombian peso, which reduced imported grain costs. Approximately 95 percent of imported corn is used in animal feed rations, while the remaining 5 percent is destined for food and industrial uses.

The poultry industry remains the largest consumer of feed grains, accounting for approximately 56 percent of corn imports, followed by the pork sector with 27 percent. The cattle sector represents about 8 percent of feed corn use, while aquaculture and the pet food industry account for the remaining 9 percent.

Figure 5. Corn Imports by Origin, MYs 2020/21-2025/26 and % Share (MMT)



Data source: Colombia National Customs Office (DIAN), Trade Data Monitor (TDM).
* MY 2025/2026 estimate based on available trade data (October 2025 to June 2026)

Stocks

Ending stocks for MY 2026/27 are estimated at approximately 272,000 MT, a 30 percent decline from the previous marketing year. This level of inventory is equivalent to roughly two weeks of domestic consumption. Grain importers in Colombia typically maintain relatively low stock levels due to frequent import purchasing cycles.[8] There are no government policies establishing grain inventories.

Policy

Recent government actions affecting the corn sector have largely focused on reducing production costs and strengthening coordination across the value chain. A central policy tool is the Access to Agricultural Inputs Fund (FAIA), created under Law 2183 of 2022, which provides financial support to lower the cost of fertilizers, seeds, and crop protection products. The program prioritizes small and medium-scale farmers and aims to improve productivity across several agricultural value chains, including corn. In 2026, the Ministry of Agriculture expanded the program's funding and implementation to further facilitate producers' access to inputs and mitigate high production costs.

The Colombian government under then-president Gustavo Petro emphasized food sovereignty objectives, including reducing dependence on imported corn. In December 2024, the Ministry of Agriculture and Rural Development formally established the National Corn Council which began operations in early 2025 and serves as a coordination platform among producers, industry stakeholders, and government agencies to promote productivity improvements, encourage biotechnology adoption, and strengthen storage and logistics within the corn sector.

[8] This tendency accounts for the U.S. corn zero percent duty, and Mercosur-origin corn duties that are published every two weeks.

The corn sector also operates a checkoff program administered by Fenalce through the National Cereal Fund. The program collects a 0.75 percent levy on the sale price per kilogram of both yellow and white corn, with funds used to support research, technical assistance, and market promotion activities within the grain sector. Despite these initiatives, structural challenges such as infrastructure limitations, high production costs, and strong competition from imported grain continue to constrain the expansion of domestic corn production.

Although corn production is not as labor-intensive as other crop systems, two regulations have raised the cost of agricultural labor in Colombia. Law 2466 of 2025 (labor reform), in effect from June 2025 and reaching full implementation in 2027, reduces the maximum workweek to 42 hours, raises the Sunday pay premium to 100 percent, redefines nighttime working hours, expands paid leave, and limits fixed-term hiring. Alongside it, Decree 1469 of 2025 increased the 2026 minimum wage by 2 percent compared to the previous year.

Colombia continues to apply trade policy instruments that affect corn imports. As a member of the Andean Community of Nations (CAN), the country maintains the Andean Price Band System (APBS) for certain agricultural products, including corn, to stabilize domestic prices (Table 2). Imports from the United States are exempt from the APBS under the CTPA, which phased out tariffs on U.S. yellow and white corn in 2023.

Table 2. CAN: Corn Floor and Ceiling Prices (USD/MT)

Period	Commodity	Floor Price CIF	Ceiling Price CIF
June 25-July 26	Yellow Corn	288	354
	White Corn	261	376

Data source: CAN Resolution 2625/2026

Since July 2025, Mercosur tariffs on yellow corn imports have been decreasing in response to rising international prices. Reference prices and applicable duties for corn imports from Mercosur countries are updated biweekly (Table 3).

Table 3. CY 2025-2026 APBS Reference Price and Effective Duties on Mercosur Origin Yellow Corn (USD/MT)

	Reference Price	Tariff	Floor Price CIF	Ceiling Price CIF	APBS Tariff	Total Tariff
Jul-25	221	15%	285	350	33%	48%
Aug-25	220	15%	285	350	34%	49%
Sep-25	222	15%	285	350	33%	48%
Oct-25	224	15%	285	350	31%	46%
Nov-25	230	15%	285	350	28%	43%
Dec-25	234	15%	285	350	25%	40%
Jan-26	234	15%	285	350	25%	40%
Feb-26	239	15%	285	350	22%	37%
Mar-26	238	15%	285	350	23%	38%
Apr-26	240	15%	292	360	25%	40%
May-26	243	15%	292	360	23%	38%
Jun-26	226	15%	292	360	34%	49%
Jul-26	240	15%	292	360	25%	40%

Data source: CAN, Resolutions of Reference Prices under the APBS. Classified as Yellow corn HS 10059011.

Mercosur tariffs on white corn imports have remained unchanged since July 2025, as white corn international prices have remained steady. Reference prices and applicable duties for corn imports from Mercosur countries are updated biweekly (Table 4).

Table 4. CY 2025-2026 APBS Reference Price and Effective Duties on Mercosur Origin White Corn (USD/MT)

	Reference Price	Tariff	Floor Price CIF	Ceiling Price CIF	APBS Tariff	Total Tariff
Jul-25	261	15%	308	374	21%	36%
Aug-25	261	15%	308	374	21%	36%
Sep-25	261	15%	308	374	21%	36%
Oct-25	261	15%	308	374	21%	36%
Nov-25	261	15%	308	374	21%	36%
Dec-25	261	15%	308	374	21%	36%
Jan-26	261	15%	308	374	21%	36%
Feb-26	261	15%	308	374	21%	36%
Mar-26	261	15%	308	374	21%	36%
Apr-26	261	15%	310	382	22%	37%
May-26	261	15%	310	382	22%	37%
Jun-26	261	15%	310	382	22%	37%
Jul-26	261	15%	310	382	22%	37%

Data source: CAN, Resolutions of Reference Prices under the APBS. Classified as white corn HS 10059012.

Commodities:
Rice

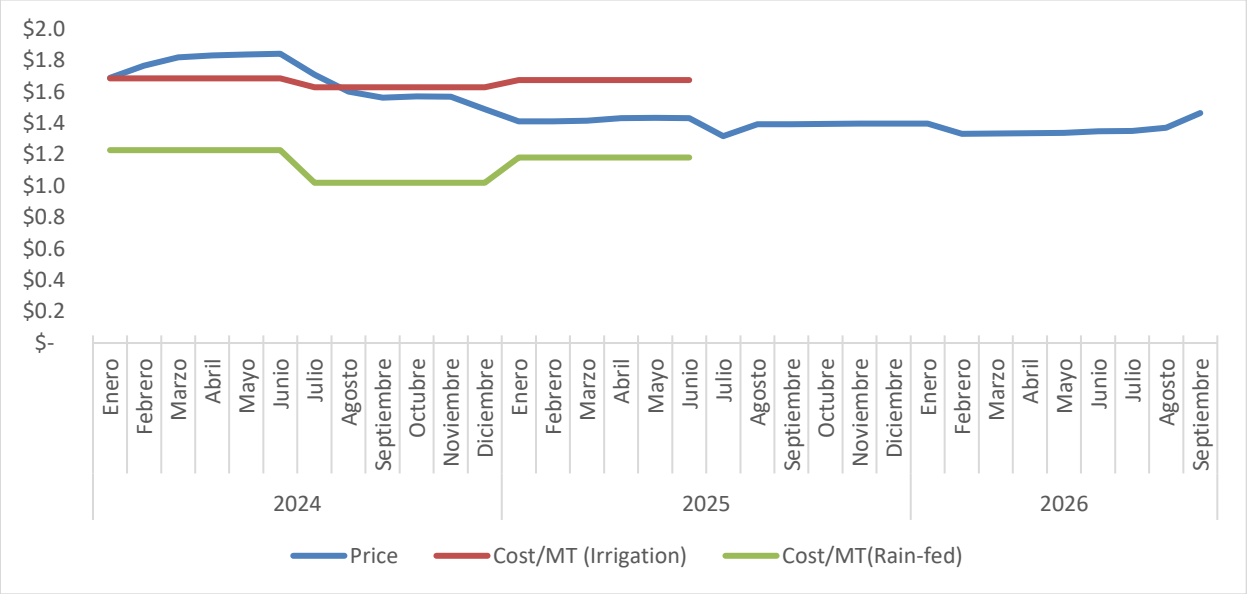
Table 5. Rice: Production, Supply and Distribution

Rice, Milled	2024/2025		2025/2026		2026/2027	
Market Year Begins	Apr 2024		Apr 2025		Apr 2026	
Colombia	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	627	627	588	590	575	560
Beginning Stocks (1000 MT)	107	107	229	229	146	178
Milled Production (1000 MT)	2048	2048	1889	1930	1925	1800
Rough Production (1000 MT)	3012	3012	2778	2838	2831	2647
Milling Rate (.9999) (1000 MT)	6800	6800	6800	6800	6800	6800
MY Imports (1000 MT)	174	174	108	108	220	240
TY Imports (1000 MT)	87	87	170	180	200	190
Total Supply (1000 MT)	2329	2329	2226	2267	2291	2218
MY Exports (1000 MT)	100	100	80	69	50	40
TY Exports (1000 MT)	100	100	80	69	50	40
Consumption and Residual (1000 MT)	2000	2000	2000	2020	2025	2030
Ending Stocks (1000 MT)	229	229	146	178	216	148
Total Distribution (1000 MT)	2329	2329	2226	2267	2291	2218
Yield (Rough) (MT/HA)	4.8038	4.8038	4.7245	4.8102	4.9235	4.7268

(1000 HA), (1000 MT), (MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Rice, Milled begins in January for all countries. TY 2026/2027 = Jan 2027 - Dec 2027

Production
In marketing year (MY) 2026/27 (April–March), Colombia's milled rice production is forecast at 1.8 million metric tons (MMT) on a milled rice equivalent (MRE) basis. This is a 6.7 percent decline from the revised MY 2025/26 estimate. The drop comes mainly from two factors: El Niño and farmgate prices that began falling in late 2024. Prices stayed low through early 2026 because of ample domestic supply, falling international rice prices, and the recent appreciation of the Colombian peso (COP) (Figure 6). In September 2026, however, prices rose 6.9 percent as harvested area shrank.

Figure 6. Domestic Rice Prices vs. Production Costs by Cropping System (COP/MT)



Data source: Colombian Rice Growers Federation (Fedearroz).
Note: Colombian peso prices based on green paddy rice on a national average. Production costs for 2025 are unpublished to date. COP 1 million equals USD $320 as on September 9, 2026.

The El Niño phenomenon drastically affects rice cultivation in Colombia by causing water scarcity, high temperatures, and significant delays in planting.

The lack of water, along with not knowing when the rain will finally arrive, makes many Colombian farmers delay their planting—or skip it altogether. As a result, the amount of land being used to grow rice drops sharply. In important rice-growing areas like the central region or the Caribbean coast, farmers could end up planting up to 20 percent less land than usual.

The impact of this climate phenomenon is not evenly distributed across Colombian territory; rather, it affects certain regions more severely. Rain-fed systems that depend exclusively on rainfall, such as the Orinoquía region, along with irrigation districts in the Andean region, particularly in departments such as Tolima, Huila, and Valle del Cauca, are the most exposed to prolonged periods of drought. Rice requires large volumes of water in both rain-fed and irrigated systems, so the vulnerability of these strategic regions points to a significant drop in national rice production. That drop could threaten food security, raise domestic prices, and reduce the incomes of thousands of the country's farmers.

Post revises MY 2025/26 Colombia milled rice production downward to 1.93 MMT to reflect updated harvest data. Although harvested area declined compared to the previous year due to lower prices, favorable growing conditions during the second half of 2025 supported improved yields.

For calendar year (CY) 2025, Colombia’s national average rice yield is estimated at approximately 5 MT/ha paddy basis. Rice is cultivated year-round, with roughly 65 percent of national production harvested between July and December. There are an estimated 16,000 rice producers distributed across five primary production regions. The eastern plains (Llanos) and the central region, which include Casanare, Meta, Tolima, and Huila departments, account for more than 70 percent of national output. Approximately 40 percent of total production originates in the Llanos, where rice is predominantly

grown under rain-fed conditions with average yields near 4 MT/ha. Producers in this region generally have greater flexibility to adjust planted area due to the availability of relatively large tracts of underutilized land. The central region, particularly Tolima and Huila, contributes about 30 percent of national production and relies largely on irrigation systems. Average yields are significantly higher, an reach 6.5 MT/ha.

Most rice growers in Colombia lack on-farm drying facilities or storage infrastructure, limiting their ability to store grain and market it later in the year. As a result, producers typically sell freshly harvested green paddy rice directly to millers, who then handle drying, storage, and processing. The Colombian milling sector consists of approximately 95 rice milling companies operating 121 mills nationwide. The largest firms, ORF S.A. and Grupo Diana, together account for nearly half of the national milling capacity and market share.

Consumption

In MY 2026/27, Colombia's milled rice consumption is projected to slightly increase to 2.03 MMT MRE basis. The modest growth reflects gradual economic recovery and population growth, although overall rice demand in Colombia tends to remain relatively stable from year to year given its importance as a daily staple.

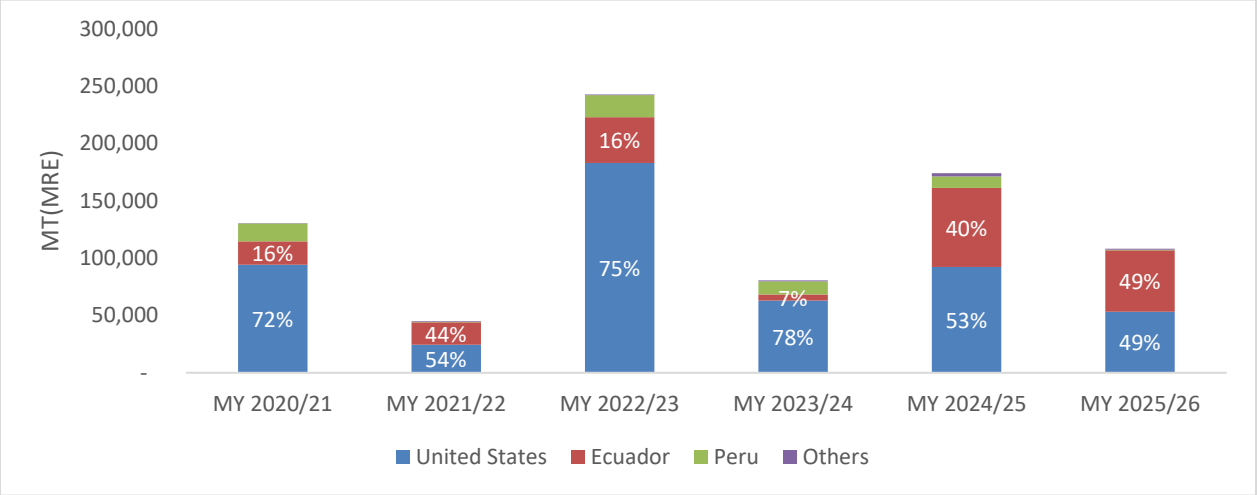
Rice is a central component of the Colombian diet, with approximately 98 percent of households consuming it regularly. Per capita consumption is high compared to other South American countries, averaging between 40 and 46 kg per person annually. Regional variation exists, with the north coast reporting higher per capita consumption. Rice is typically served as a daily side dish with traditional meals.

Retail distribution is dominated by small neighborhood stores or "*tiendas*," which account for about 90 percent of rice sales. Supermarkets and wholesale or traditional markets make up the remainder. In recent years, discount retail chains have expanded their presence and introduced private-label rice brands, which are gaining market share among price-sensitive consumers. Domestic production supplies approximately 90 percent of national demand, while imports cover the remaining 10 percent, depending on domestic production levels and price competitiveness.

Trade

In MY 2026/27, Colombian rice imports are forecast to rise by 122.2 percent year-on-year, reaching 240,000 MT (MRE). This increase is attributed to lower domestic production, favorable international prices, and the appreciation of the Colombian peso, which enhances the affordability of imported rice. The United States is expected to regain market share, supported by competitive pricing and Colombia's ongoing trade disputes with Ecuador.

Figure 7. Rice Imports by Country of Origin and Percent Share (MY, MT MRE)

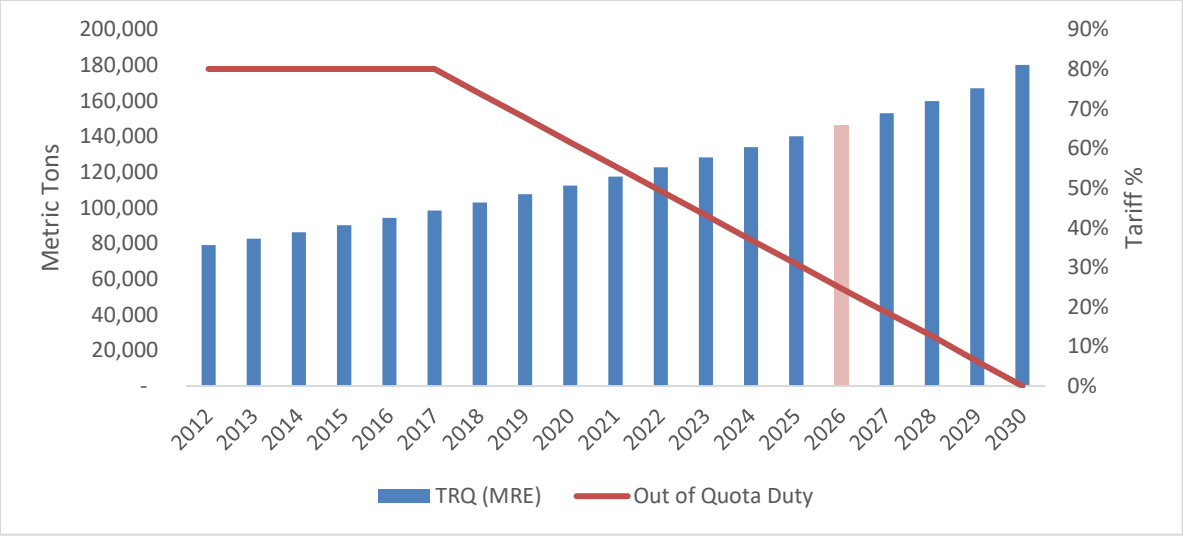


Data source: DIAN, Trade Data Monitor (TDM).

For MY 2025/26, rice import estimates have been revised to 108,000 MT (MRE). This reflects the full allocation of the first CTPA tariff-rate quota (TRQ) auction, which took place between February 1 and June 30, during which the Colombia imported 102,452 MT of rice. From April to December 2025, Colombia imported larger volumes of rice from Ecuador, drawn by its high quality and competitive prices (Figure 7). However, ongoing trade disputes and the imposition of reciprocal tariffs shifted market share toward U.S. rice for four months, until the dispute ended in June 2026.

For CY 2026, Colombia's U.S.-origin rice TRQ is set at 146,304 MT, with an out-of quota duty rate of 24.6 percent. The TRQ is scheduled to be phased out by 2030, at which time U.S. rice will be able to enter Colombia duty-free, quota-free (Figure 8).According to industry sources, competitive U.S. prices, a stronger Colombian peso, and government interventions that raised domestic rice prices together increased demand for U.S. rice. The June and October 2026 auctions allocated 21,267 MT and 22,585 MT, respectively, filling the full 2026 tariff-rate quota.

Figure 8. U.S. Rice CTPA Tariff Schedule (CYs 2012-2030) (MT)



Data Source: United States Trade Representative.

Colombia, Ecuador, Peru, and Bolivia, all CAN members, benefit from zero-tariff duties on rice trade. In 2023, Colombia lifted restrictions on milled rice imports from Ecuador, following a similar move for Peru in 2022. CAN-origin rice may enter Colombia during two annual windows: January 1 to June 30 and November 15 to December 31, with most imports from Ecuador and Peru supplying the southwestern market. However, ongoing trade tensions between Colombia and Ecuador have affected rice imports (see Policy section).

Colombia is not a major rice exporter and generally cannot compete on price with neighboring countries. Some milled rice continues to flow through Venezuela via the shared border, primarily due to supply shortages in Venezuela. For MY 2026/27, Colombian rice exports to Venezuela are forecast to increase, as Venezuela is expected to diversify its sources and Colombian production is projected to decline. Marginal exports to other destinations, such as Cuba,[9] may occur, bringing total MY 2026/27 rice exports to an estimated 40,000 MT milled rice basis.

Stocks

Ending stocks for MY 2026/2027 are projected at 148,000 MT MRE, representing a 17 percent decrease from the revised previous year's estimate. This reduction reflects lower production and ongoing market stabilization. The projected stock level is sufficient to cover more than one month of industry consumption. The Colombian government does not maintain official grain stockholding policies. In the past, the Ministry of Agriculture provided financial incentives to producers and millers to store rice inventories on an ad hoc basis, aiming to stabilize prices during the peak harvest season in the latter half of the year. However, this program has not been implemented since 2024.

Policy

Colombian rice sector programs are primarily managed by Fedearroz through the National Rice Fund, which collects a 0.5 percent checkoff from the sale price of each kilogram of green paddy rice at the point of purchase at the mill. Nearly 70 percent of rice growers are Fedearroz members, but all of them are benefiting from educational initiatives, technical training, and sales support. Fedearroz also provides extension services and implements the AMTEC program ("Massive Technological Adoption," in Spanish), which promotes the adoption of crop management technologies to enhance productivity and reduce costs with minimal environmental impact.

Trade policy developments in early 2026 further impacted the sector. In response to Ecuador's imposition of a "security tariff" on Colombian imports, Colombia's Ministry of Trade, Industry and Tourism (MINCIT) issued a February 2026 decree, imposing reciprocal 30 percent ad valorem tariffs on 73 HS codes—including paddy and milled rice, and prohibiting overland imports of Ecuadorian rice at border crossings. On March 2, following Ecuador's escalation of its own security tariff to 50 percent (effective March 1), MINCIT published a draft decree proposing a corresponding increase in Colombia's reciprocal tariffs to the same rate. The Colombian government cited high domestic inventories and concerns about contraband as justification for these measures. The dispute escalated further on May 1, when Ecuador raised its tariff to 100 percent, marking the peak of the conflict. The dispute between Colombia and Ecuador was ultimately resolved on June 1, and trade flows are expected to return to normal.

[9] As part of the government's efforts to address domestic oversupply, marginal quantities of rice have been exported to Cuba Source: Rice farmers from Tolima will sell 1,644 tons to Cuba and to public entities in Colombia, Colombian Presidency, published July 2025.

In 2026, the Colombian government is also supporting rice producers through the FAIA and the Agricultural Solidarity Fund (FONSA). FAIA subsidizes agricultural inputs such as fertilizers and seeds, with approximately COP 7 billion (USD $1.7 million) allocated to the rice sector. FONSA provides financial relief by restructuring, refinancing, or partially forgiving agricultural debt for producers affected by economic or production challenges.

To address ongoing price concerns, the Ministry of Agriculture also issued Resolution 241 of 2025, establishing a supervised pricing regime (*libertad vigilada*) for green paddy rice, with region-specific reference prices and standardized quality parameters. Industry groups criticized the set prices as too high, leading to a refusal to purchase at those rates. In response, the Superintendence of Industry and Commerce approved a voluntary stabilization agreement between producers and millers through Resolution 65722 on August 29, 2025, setting minimum prices, payment terms, and quality standards. Subsequent resolutions including 72845 (September 18, 2025) and 88766 (October 30, 2025) further clarified and extended the agreement's scope. On February 4, 2026, the Ministry of Agriculture issued Resolution 042, extending the rice minimum price mechanism through May 31,2026.

Commodities:
Wheat

Table 6. Rice: Production, Supply and Distribution

Wheat	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jul 2024		Jul 2025		Jul 2026	
Colombia	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	3	3	2	2	2	2
Beginning Stocks (1000 MT)	219	219	148	165	139	165
Production (1000 MT)	6	6	6	5	4	4
MY Imports (1000 MT)	1899	1899	1926	1926	2000	2150
TY Imports (1000 MT)	1899	1899	1926	1926	2000	2150
Total Supply (1000 MT)	2124	2124	2080	2096	2143	2319
MY Exports (1000 MT)	26	26	21	21	25	24
TY Exports (1000 MT)	26	26	21	21	25	24
Feed and Residual (1000 MT)	100	83	70	60	70	120
FSI Consumption (1000 MT)	1850	1850	1850	1850	1850	1975
Total Consumption (1000 MT)	1950	1933	1920	1910	1920	2095
Ending Stocks (1000 MT)	148	165	139	165	198	200
Total Distribution (1000 MT)	2124	2124	2080	2096	2143	2319
Yield (MT/HA)	2	2	3	2.5	2	2

Data Source: FAS historical data series. Post estimates for MY 2026/2027.

Production
For MY 2026/27 (July–June), Colombia's wheat production is forecast at approximately 3,800 MT on an estimated harvested area of 1,600 ha. Production remains limited and is concentrated in high-altitude areas of the departments of Boyacá, Cundinamarca, and Nariño. Wheat cultivation in Colombia is generally unprofitable due to low yields and challenging climatic conditions, and most farms are small,

typically under two ha, located between 2,800 and 3,200 meters above sea level. Domestic production mainly supplies local markets for traditional food products.

Consumption

In MY 2026/27, Colombia's wheat consumption is forecast to reach approximately 2.09 MMT wheat grain equivalent (WGE), reflecting modest growth in demand for wheat-based food products. Food, seed, and industrial (FSI) use accounts for nearly all wheat consumption and is expected to increase slightly as household demand for bread, pasta, and other processed wheat products remains stable due to projected moderate economic growth in Colombia, although persistently high inflation continues to constrain household purchasing power. Bread continues to be the primary wheat-based product in Colombia, with per-capita consumption estimated at around 22 kg in 2025, and nearly 70 percent of households consuming bread products daily. The bakery sector remains extensive, with more than 25,000 pastries and bakery shops operating nationwide.

Wheat consumption in MY 2025/2026 is estimated at 1.9 MMT WGE, a slight year-on-year decrease following a similar decline observed in previous years due to food inflation and weaker purchasing power. Still, household spending on wheat-derived foods, including bread, pasta, cookies, and other bakery products, remains significant. In 2024, Colombian households spent approximately 7.6 percent of total food expenditures on wheat-based foods, underscoring its importance in the national diet.[10]

Colombia's wheat milling industry includes around 40 milling facilities, primarily located along the northern coast, central, and southwestern regions, producing roughly 1.5 MMT of wheat flour annually.[11] Bread products represent the largest share of wheat consumption, accounting for about 70 percent, followed by cookies and crackers (12 percent), pasta (11 percent), household baking (3 percent), and less than 4 percent used in animal feed. Wheat used in feed rations remains limited and price-sensitive, as feed manufacturers typically substitute lower-cost ingredients such as corn or dried distillers grains when available.

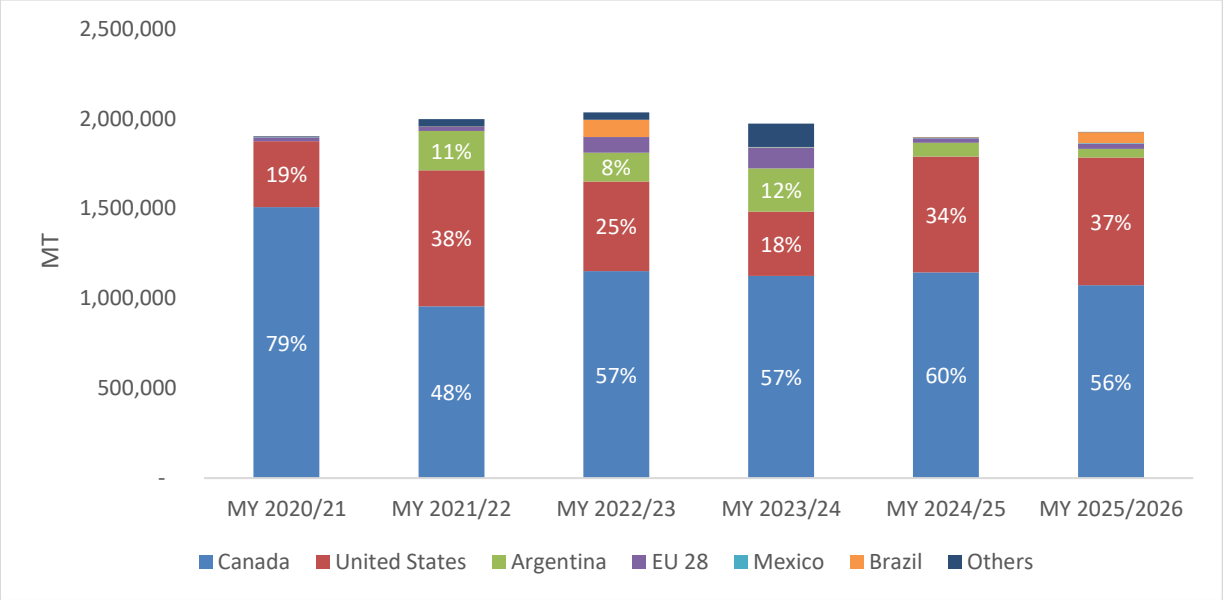
Trade

In MY 2026/2027 (July–June), wheat imports are forecast to increase 11.6 percent year-on-year to 2.1 MMT wheat grain equivalent (WGE), in line with marginal growth in domestic consumption supported by moderate economic expansion and promotional campaigns aimed at increasing demand for wheat-based foods. Colombia relies almost entirely on imports to supply its milling industry, as domestic wheat production remains minimal.

In MY 2025/26 wheat imports are revised downward to 1.9 MMT WGE, reflecting weakened demand, particularly from the animal feed sector, which has substituted wheat with more competitively priced feed ingredients. In addition, higher consumer taxes on certain processed wheat products have tempered import growth. Canada and the United States remain Colombia's principal wheat suppliers (Figure 9). However, recent trade patterns indicate larger imports of U.S. wheat at the expense of Canadian shipments, driven by competitive U.S. prices, favorable exchange rate conditions, and logistical advantages from Gulf export terminals. The diversity of U.S. wheat classes also allows millers to blend different protein levels to meet flour specifications for various wheat-based products.

[10] Source: Spending on wheat-derived foods reached COP 25.9 trillion in Colombia during 2024. Portafolio, July 2025.
[11] Colombia's milling factor is estimated between 77-79 percent.

Figure 9. Wheat Imports by Country of Origin (MY, MT, WGE) with % Market Share



Data source: National Directorate of Taxes and Customs (DIAN), TDM.

Colombia has approximately 60 wheat importers, supplying a well-developed milling industry. Nearly 98 percent of imports consist of raw wheat grain for domestic milling, while the remaining 2 percent correspond to processed wheat products, including pasta and other wheat-based foods. In the current year, imports of finished products—particularly pasta from Italy and Mexico—have increased, reflecting growing demand for processed wheat products in the retail and food service sectors. Traditionally, Colombia imports Canadian Red Spring and Prairie Spring Red wheat, valued for their high protein content required for bread flour production, whereas U.S. wheat exports to Colombia have primarily included Soft Red Winter wheat, accounting for the majority of shipments, followed by Hard Red Winter and Hard Red Spring varieties. Colombia also occasionally sources wheat from non-traditional suppliers in South America when price conditions are favorable.

Colombia imports wheat with varying protein levels to meet different processing requirements. High-protein wheat (above 13.5 percent), primarily supplied by Canada, is widely used for bread production and represents the largest share of milling demand, while lower-protein wheat including U.S.-origin is typically used in the production of cookies and confectionery products.

In MY 2026/27, Colombia's wheat product exports are expected to increase modestly, driven by growing demand for processed wheat products in regional markets. Exports consist mainly of pasta and wheat flour, with pasta accounting for the largest share of shipments. Since 2023, Cuba has become the main destination for exports of Colombian wheat products, followed by Mexico and the United States, while smaller volumes of wheat flour are also exported to Cuba. For MY 2025/26, exports reached 21,400 MT WGE, down from 26,000 MT WGE in MY 2024/25. The decrease reflects a gradual shift in the export mix toward pasta and other higher-value processed products, replacing the historical dominance of wheat flour exports.

Stocks
Ending wheat stocks in MY 2026/27 are projected at 200,000 MT WGE, equivalent to roughly one month of domestic consumption. Both feed manufacturers and flour mills typically operate with relatively low carry-over inventories; however, most milling facilities have storage capacity sufficient to cover up to two months of operational needs.

Policy
Colombia maintains an open trade policy for wheat imports, reflecting the country's heavy reliance on foreign supply to meet domestic demand. The country currently has 18 trade agreements in force, most of which grant zero-percent import duties on wheat, including shipments from Canada and the United States, Colombia's principal suppliers. Wheat imports from CAN members are currently duty-free due to government measures suspending the APBS mechanism. In 2024, the government of Colombia published a decree that established zero-percent tariffs on wheat imports from all origins for two years,[12] extending a policy first introduced in 2020 to mitigate global supply disruptions and elevated food prices during the COVID-19 pandemic. This measure helped maintain stable wheat import flows and supports price stability for wheat-based food products. This decree expired in August 2026, and it has not been renewed.

Domestic demand for wheat products is also influenced by broader food and nutrition policies. Under Law 2277 of 2023, the government implemented "healthy taxes" targeting ultra-processed foods high in sodium, added sugars, and fats. The policy introduced a 10 percent tax in 2023, which increased to 20 percent in January 2025. The regulation applies to products such as cookies and certain pastry items that exceed established nutritional thresholds, while bread is exempt due to its role as a staple food. Although the measure aims to improve public health outcomes, it has the potential to moderate consumption growth for some processed wheat products.

Mandatory fortification of mass-consumption foods, including wheat flour, a basic ingredient in products such as bread, must now meet the technical requirements set out in Decree 380 of 2026. The decree requires adding essential vitamins and minerals, such as iron, zinc, and vitamins A, B12, and D. The measure aims to prevent nutritional deficiencies and reduce inequalities in access to adequate nutrition.

Attachments:

No Attachments

[12] Decree 1092 of August 2024 notes, "By which the Customs Tariff for the importation of wheat is partially modified and the application of the Andean Price Band System for wheat is suspended."