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# **Report Name:** Grain and Feed Annual

**Country:** Colombia

**Post:** Bogota

**Report Category:** Grain and Feed

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**Approved By:** Colby Branch

**Report Highlights:**

In MY 2026/2027, Colombia's corn and rice production are expected to decline primarily due to low farmgate prices that have discouraged expansion of planted area, while imports 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 and ongoing trade frictions with Ecuador 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.

**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 | 0 | 350 |
| **Beginning Stocks** (1000 MT) | 390 | 390 | 392 | 392 | 0 | 377 |
| **Production** (1000 MT) | 1500 | 1500 | 1550 | 1450 | 0 | 1400 |
| **MY Imports** (1000 MT) | 7463 | 7463 | 8000 | 8200 | 0 | 8300 |
| **TY Imports** (1000 MT) | 7463 | 7463 | 8000 | 8200 | 0 | 8300 |
| **Total Supply** (1000 MT) | 9353 | 9353 | 9942 | 10042 | 0 | 10077 |
| **MY Exports** (1000 MT) | 11 | 11 | 2 | 5 | 0 | 5 |
| **TY Exports** (1000 MT) | 11 | 11 | 2 | 5 | 0 | 5 |
| **Feed and Residual** (1000 MT) | 7350 | 7350 | 7950 | 8050 | 0 | 8150 |
| **FSI Consumption** (1000 MT) | 1600 | 1600 | 1600 | 1610 | 0 | 1620 |
| **Total Consumption** (1000 MT) | 8950 | 8950 | 9550 | 9660 | 0 | 9770 |
| **Ending Stocks** (1000 MT) | 392 | 392 | 390 | 377 | 0 | 302 |
| **Total Distribution** (1000 MT) | 9353 | 9353 | 9942 | 10042 | 0 | 10077 |
| **Yield** (MT/HA) | 4.05 | 4.05 | 4.19 | 4.03 | 0 | 4.00 |
| OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query | | | | | | |

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

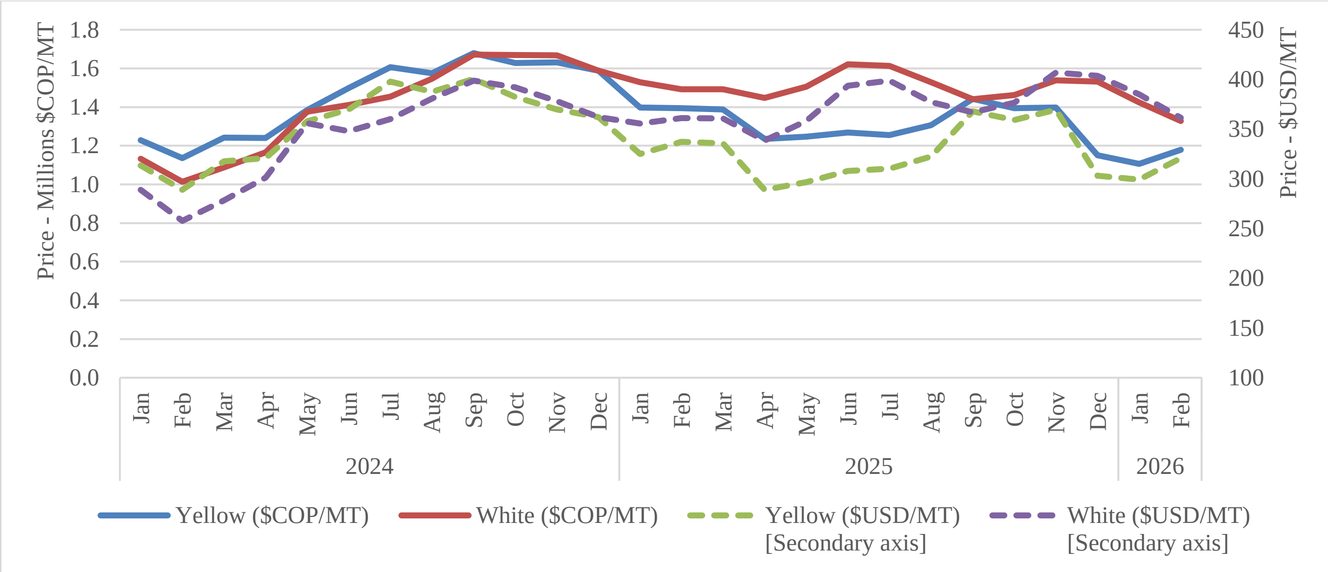
**Production**

In marketing year (MY) 2026/2027 (October-September), Colombian corn production is forecast to decrease 3.4 percent year-on-year from the revised estimate to 1.40 million metric tons (MMT). Production is expected to remain constrained by weak farmgate prices that continue to discourage expansion of planted areas (Figure 1). Harvested area is projected to decrease to approximately 350,000 hectares (ha), while yields are expected to decline slightly due to weather-related disruptions during recent planting cycles, primarily in Colombia's north coast.

In MY 2025/2026 corn production estimate is revised downward to 1.45 MMT, reflecting adverse weather conditions that affected several producing regions. In early 2026, heavy rainfall associated with an atypical cold front affected the Caribbean and Andean regions, particularly the departments of Córdoba, Cundinamarca, and Tolima. According to the National Federation of Cereal, Legume, and Soybean Growers (Fenalce), Córdoba, which is the second largest corn-producing department, received more than 200 millimeters of rainfall within a few days during a normally dry period. The precipitation occurred during critical harvest stages, delaying field operations, increasing grain moisture levels that required additional drying, and limiting access to fields due to soil saturation, which contributed to grain quality deterioration and higher fungal disease pressure. Fenalce estimates that approximately 2,373 hectares of corn were affected, impacting more than 1,000 producers.[1]

[1] Source: Corn and beans, the crops most affected by rainfall in the country, Fenalce, February 2026.

**Figure 1. Colombia: Domestic Average Monthly Corn Prices Paid to Producers Calendar Years (CY) 2024-2026, million 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.[2] 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)[3] has identified nearly 16 million hectares in Colombia as suitable for corn cultivation (Figure 2); however, expansion remains limited due to infrastructure constraints, restricted access to agricultural inputs, and investment barriers, particularly in the eastern plains. Private sector initiatives[4] 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.

In 2024[5], Colombia planted approximately 131,450 hectares of genetically engineered (GE) corn, representing a 7 percent decline compared to 2023 and reflecting the broader contraction in domestic corn production. The main GE corn producing departments were Meta, Córdoba, Tolima, Valle del Cauca, and Cesar.

**Figure 2. Colombia: Corn Production Suitability**

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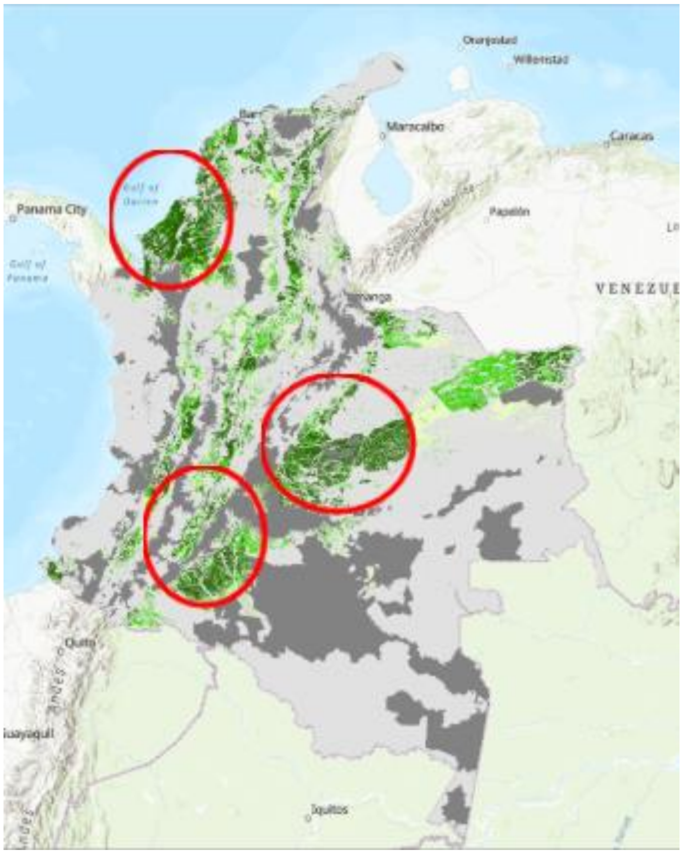
[2] Source: Area and Production Statistics, Fenalce; published March 2026.
[3] Agency within the Ministry of Agricultural and Rural Development.
[4] One prominent investment is the *Soya-Maiz Proyecto Pais Initiative*, a program launched in 2020 to vastly scale planted areas of corn and soybean in the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



**Data Source:** System for Rural Agricultural Planning (SIPRA), UPRA, March 2026.[6]

### Consumption

In MY 2026/2027, corn consumption is forecast to increase slightly to 9.77 MMT, supported by modest growth in the animal feed sector, while food, seed, and industrial (FSI) use remains stable. Per-capita FSI corn consumption is estimated at approximately 30 kilograms. Feed demand is projected to reach 8.15 MMT, reflecting continued expansion in livestock production despite persistent inflation and moderate economic growth expected in 2026–2027.[7]

For MY 2025/2026, total corn consumption is revised upward to 9.66 MMT, primarily due to stronger feed demand. Lower international corn prices and a stronger Colombian peso reduced feed costs[8], 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

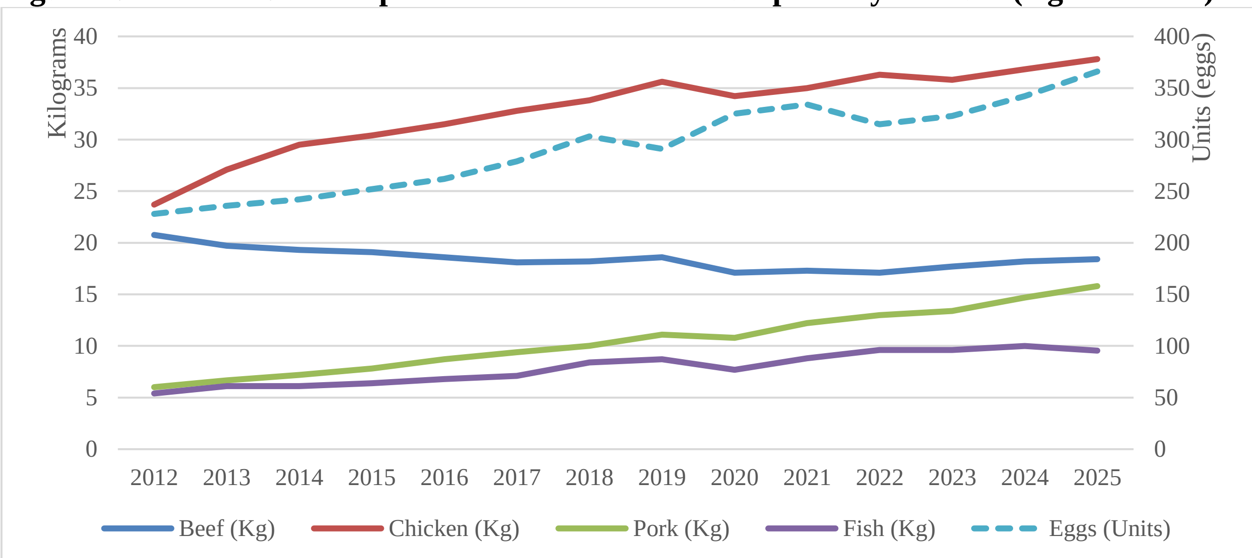
[6] This map illustrates optimal areas for corn production for the second semester. The dark green illustrates the highly suitable land for corn production (8.2 million ha), medium green indicates moderately suitable (4.9 million ha), and light green corresponds to marginally suitable land (2.9 million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

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

[8] 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.

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 and slightly declined in 2025, at around 9 kg per capita (Figure 3).

**Figure 3. Colombia: Per Capita Animal Protein Consumption by Product (Kg and Units)**




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

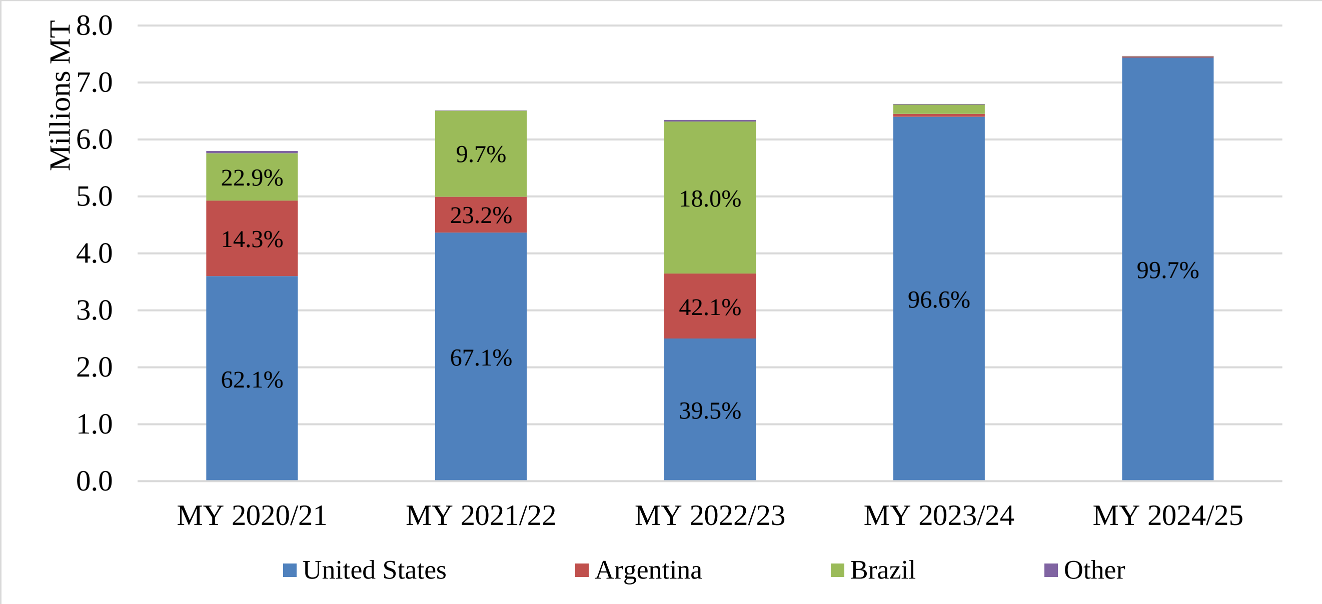
## Trade

In MY 2026/2027, corn imports are projected to reach 8.3 MMT, a 1.2 percent increase from the revised MY 2025/2026 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 are revised upward 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 the cost of imported grain. 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 65 percent of corn imports, followed by the pork sector with 17 percent. The cattle sector represents about 8 percent of feed corn use, while aquaculture and the pet food industry account for the remaining 10 percent.

**Figure 4. Colombia: Corn Imports by Country of Origin and Percentage Share (MMT)**




**Data source**: Colombia National Customs Office (DIAN), Trade Data Monitor (TDM).

## Stocks

Ending stocks for MY 2026/2027 are estimated at approximately 302,000 metric tons (MT), representing a slight 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.[9] 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 has also 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.

[9] 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.

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)[10]**

| Period | Commodity | Floor Price CIF | Ceiling Price CIF |
|---|---|---|---|
| April 2025 -March 2026 | Yellow Corn | $285 | $350 |
| | White Corn | $308 | $374 |
| April 2026-March 2027 | Yellow Corn | $292 | $360 |
| | White Corn | $310 | $382 |

**Data source**: CAN Resolution 2456/2024. CAN Resolution 2546/2025

Since April 2023, Mercosur tariffs on yellow and white corn imports have been established in response to declining 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 and White Corn (USD/MT)**

| 2025 – 2026 | Yellow corn (HS 10059011) | | White corn (HS 10059012) | |
|---|---|---|---|---|
| | Reference Price | Tariff % | Reference Price | Tariff % |
| April 1-15 | $227 | 29 | $270 | 16 |
| April 16-30 | $234 | 25 | $272 | 15 |
| May 1-15 | $241 | 21 | $277 | 13 |
| May 16-31 | $241 | 21 | $279 | 12 |
| June 1-15 | $227 | 29 | $264 | 19 |
| June 16-30 | $231 | 27 | $265 | 19 |
| July 1-15 | $226 | 30 | $261 | 21 |
| July 16-31 | $218 | 35 | $261 | 21 |
| August 1-15 | $222 | 33 | $261 | 21 |

[10] The CAN reference price is the biweekly average of daily, weekly, or monthly quotations observed in the referential markets (FOB Gulf based on the Chicago Board of Trade first position for corn). Such a reference price must be expressed in terms of CIF. Depending on how bi-weekly CIF reference prices of corn behave, the effective duties under the APBS for each period will be established.

| | | | | |
|---|---|---|---|---|
| **August 16-31** | $220 | 34 | $261 | 21 |
| **September 1-15** | $220 | 34 | $261 | 21 |
| **September 16-30** | $221 | 33 | $261 | 21 |
| **October 1-15** | $218 | 35 | $261 | 21 |
| **October 16-31** | $227 | 29% | $261 | 21% |
| **November 1-15** | $223 | 32% | $261 | 21% |
| **November 16-30** | $226 | 30% | $261 | 21% |
| **December 1-15** | $230 | 28% | $261 | 21% |
| **December 16-31** | $231 | 27% | $261 | 21% |
| **January 1-15** | $233 | 26% | $261 | 21% |
| **January 16-31** | $235 | 24% | $261 | 21% |
| **February 1-15** | $235 | 24% | $261 | 21% |
| **February 16-28** | $233 | 26% | $261 | 21% |
| **March 1-15** | $239 | 22% | $261 | 21% |
| **March 16-31** | $240 | 22% | $261 | 21% |

**Data source:** Andean Community of Nations, Resolutions of Reference Prices under the APBS.

**Commodities:**
Rice

**Table 4. 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 | 570 | 590 | 0 | 550 |
| **Beginning Stocks** (1000 MT) | 107 | 107 | 229 | 229 | 0 | 199 |
| **Milled Production** (1000 MT) | 2048 | 2048 | 1940 | 1950 | 0 | 1850 |
| **Rough Production** (1000 MT) | 3012 | 3012 | 2853 | 2868 | 0 | 2721 |
| **Milling Rate (.9999)** (1000 MT) | 6800 | 6800 | 6800 | 6800 | 0 | 6800 |
| **MY Imports** (1000 MT) | 174 | 174 | 100 | 120 | 0 | 200 |
| **TY Imports** (1000 MT) | 87 | 87 | 150 | 150 | 0 | 180 |
| **Total Supply** (1000 MT) | 2329 | 2329 | 2269 | 2299 | 0 | 2249 |
| **MY Exports** (1000 MT) | 100 | 100 | 100 | 80 | 0 | 50 |
| **TY Exports** (1000 MT) | 100 | 100 | 100 | 80 | 0 | 50 |
| **Consumption and Residual** (1000 MT) | 2000 | 2000 | 2025 | 2020 | 0 | 2030 |
| **Ending Stocks** (1000 MT) | 229 | 229 | 144 | 199 | 0 | 169 |
| **Total Distribution** (1000 MT) | 2329 | 2329 | 2269 | 2299 | 0 | 2249 |
| **Yield (Rough)** (MT/HA) | 4.80 | 4.80 | 5.01 | 4.86 | 0 | 4.95 |
| *MY = Marketing Year, begins with the month listed at the top of each column*<br>*TY = Trade Year, which for Rice begins in January for all countries. TY 2026/2027 = January 2027 - December 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 2026/2027 (April–March), Colombia's milled rice production is forecast at 1.85 million metric tons (MMT) on a milled rice equivalent (MRE) basis, representing a 5.1 percent decline from the revised MY 2025/2026 estimate. The reduction primarily reflects lower planted area, as producers respond to declining farmgate prices that began falling in late 2024. As of February 2026, prices received by farmers were approximately 5.6 percent lower year-on-year, contributing to continued protests by rice producers. Growers report that current market prices remain below production costs (Figure 6). Prices have remained under pressure due to ample domestic supply, combined with a downward trend in international rice prices and the recent appreciation of the Colombian peso, which has increased the competitiveness of imported rice.

Weather conditions across most of Colombia's principal, rain-fed rice producing areas in the Meta and Casanare departments have been generally favorable. Planting activities are expected to begin in mid-March, in line with the typical seasonal calendar (Figure 5). However, the planted area in this region, the eastern plains, is projected to contract as producers respond to continued weakness in rice prices. In contrast, rice fields along Colombia's north coast, which account for roughly 6 percent of national production, experienced significant flooding in early 2026. In the central producing region, particularly in the Tolima and Huila departments, above-average rainfall delayed planting during the early months of 2026.

**Figure 5. Rice field prepared for rain-feed planting in Meta Department.**

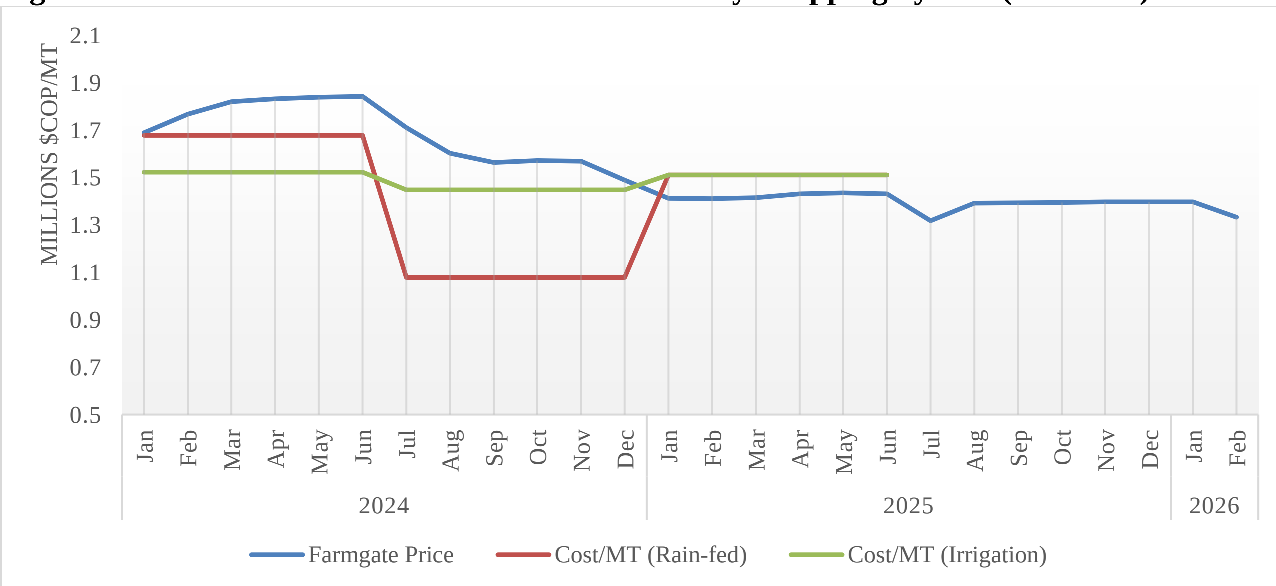
**Source:** Post field visit; Puerto Lopez, Meta department, March 5th, 2026.

Post revises MY 2025/26 Colombia milled rice production upward to 1.95 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 CY 2025, Colombia's national average rice yield is estimated at approximately 5 metric tons per hectare on a paddy basis. Rice is cultivated year-round, with roughly 65 percent of national production harvested between July and December. The country has 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 per hectare. 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 in this region are significantly higher, reaching about 6.5 MT per hectare.

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.

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




**Data Source:** Colombian Rice Growers Federation (Fedearroz).
**Note:** Prices based on green paddy rice on a national average. July 2025-February 2026 production costs unpublished to date.

## Consumption

In MY 2026/27, Colombia's milled rice consumption is projected to increase slightly to 2.03 million MMT on a MRE basis. The modest growth reflects gradual economic recovery[11] and population growth, although overall rice demand in Colombia tends to remain relatively stable from year to year because it is already a widely consumed 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 kilograms 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, known as "*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

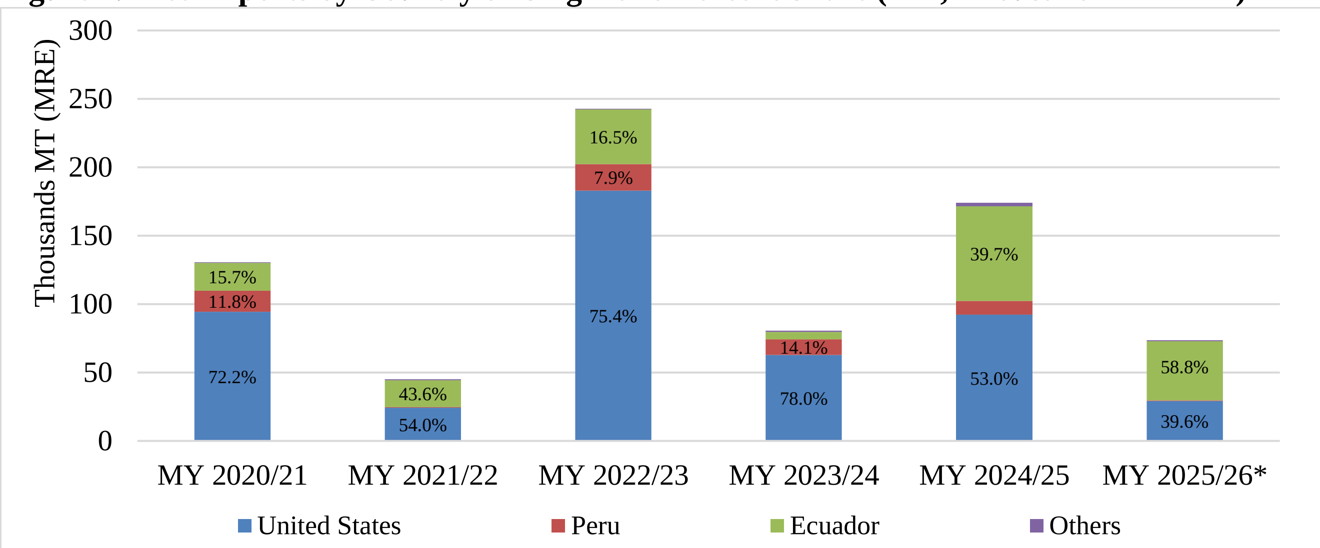
In MY 2026/27, Colombian rice imports are forecast to rise by 67 percent year-on-year, reaching 200,000 MT MRE. This increase is attributed to lower domestic production, favorable international prices, and the appreciation of the Colombian peso, which enhances the affordability of imported rice.

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

The United States is expected to regain market share, supported by competitive pricing and Colombia's ongoing trade disputes with Ecuador.

For MY 2025/26, rice import estimates have been revised to 120,000 MT MRE. From April to December 2025, imports totaled nearly 74,000 MT MRE. With the full allocation of the first auction of the CTPA tariff-rate quota (TRQ)[12], rice imports are expected to increase in the first quarter of 2026. During this specific period, April to December 2025, Colombia imported larger volumes of rice from Ecuador, attracted by high quality and competitive prices. However, ongoing trade disputes and the imposition of reciprocal tariffs are expected to shift market share toward U.S. rice in early 2026.

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

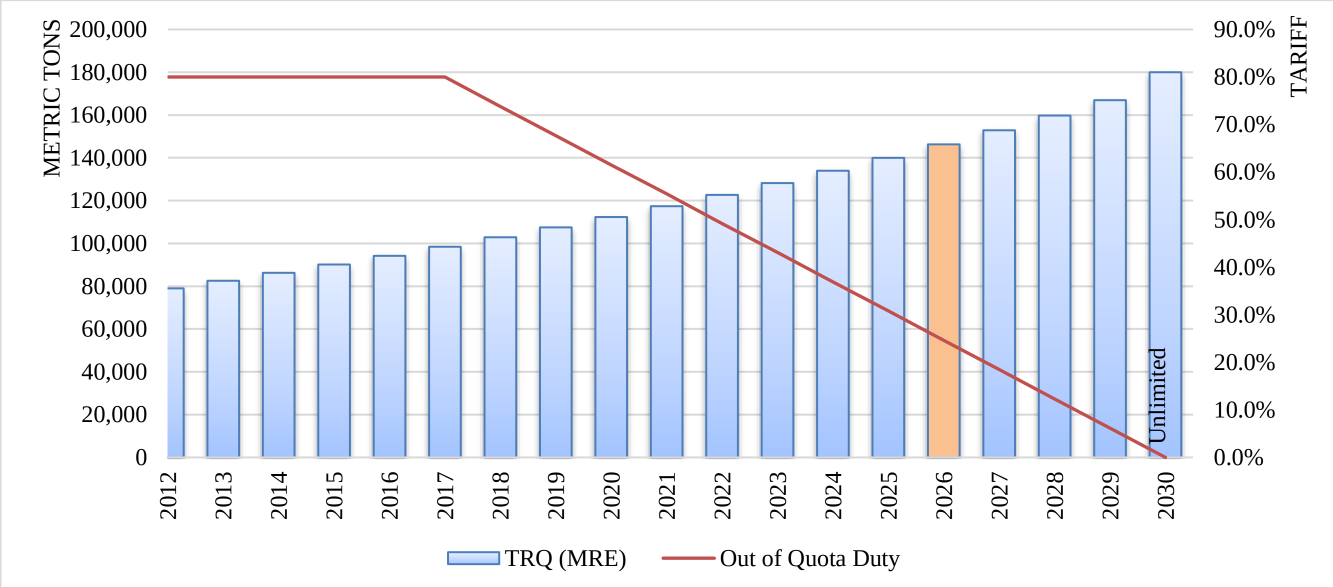



**Data source**: DIAN, TDM.
**Note**: * MY 2025/2026 includes available trade data from April 2025 to December 2025.

For calendar year 2026, TRQ for U.S. rice under the CTPA is set at 146,304 metric tons, 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). The first 2026 Colombia Rice Export Quota (COL-RICE) auction was fully subscribed, allocating 102,452 MT on a MRE basis. According to industry sources, increased demand for U.S. rice was driven by competitive pricing and the appreciation of the Colombian peso, as well as higher prices for domestic rice resulting from government interventions. Two additional COL-RICE auctions are scheduled for June and October 2026 to allocate the remaining 43,852 MT MRE of the quota.

[12] The first 2026 Colombia Rice Export Quota (COL-RICE) auction was fully subscribed. This amount represents 70 percent of the total annual quota and is eligible for entry into Colombia from February 1 to June 30, 2026.

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




**Data Source:** CTPA, Appendix 1.

Colombia, Ecuador, Peru, and Bolivia, members of the CAN, 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 recently 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 decrease slightly to 40,000 MT MRE, as Venezuela is expected to diversify its sources and Colombian production is projected to decline. Marginal exports to other destinations, such as Cuba[13], may occur, bringing total MY 2026/2027 rice exports to an estimated 50,000 MT MRE.

## Stocks

Ending stocks for MY 2026/2027 are projected at 169,000 MT MRE, representing a 15 percent decrease from the revised estimate for the previous year. 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.

[13] 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.

**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.

In 2025, government policy focused on stabilizing producer income in response to widespread protests over low farmgate prices and limited storage capacity. Road blockades by growers prompted the Ministry of Agriculture to negotiate a one-time support package of COP 21.9 billion (approximately USD 5 million) for small and medium-sized farmers, aimed at covering production costs and facilitating sales. These measures were complemented by expanded financing access and public procurement initiatives.

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 (SIC) 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—72845 (September 18, 2025) and 88766 (October 30, 2025)—clarified and extended the agreement's scope. On February 4, 2026, the Ministry of Agriculture issued Resolution 042, extending the minimum price mechanism through May 31, 2026.

In 2026, the Colombian government is also supporting rice producers through the Access to Agricultural Inputs Fund (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.

Trade policy developments in early 2026 have 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 decree on February 20, 2026, imposing reciprocal tariffs of 30 percent *ad valorem* on 73 HS codes, including paddy and milled rice, and prohibiting overland imports of Ecuadorian rice at border crossings. On March 2, MINCIT published a draft decree proposing an increase in reciprocal tariffs to 50 percent, following Ecuador's escalation of its "security tariff" to the same rate effective March 1. The Colombian government cited high domestic inventories and concerns about contraband as justification for these measures.

**Commodities:**
Wheat

**Table 5. Wheat: 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 | 0 | 2 |
| **Beginning Stocks** (1000 MT) | 236 | 236 | 165 | 165 | 0 | 143 |
| **Production** (1000 MT) | 6 | 6 | 6 | 6 | 0 | 4 |
| **MY Imports** (1000 MT) | 1899 | 1899 | 2200 | 2000 | 0 | 2050 |
| **TY Imports** (1000 MT) | 1899 | 1899 | 2200 | 2000 | 0 | 2050 |
| **MY Exports** (1000 MT) | 26 | 26 | 25 | 28 | 0 | 30 |
| **TY Exports** (1000 MT) | 26 | 26 | 25 | 28 | 0 | 30 |
| **Feed and Residual** (1000 MT) | 100 | 100 | 100 | 100 | 0 | 100 |
| **FSI Consumption** (1000 MT) | 1850 | 1850 | 1950 | 1900 | 0 | 1920 |
| **Total Consumption** (1000 MT) | 1950 | 1950 | 2050 | 2000 | 0 | 2020 |
| **Ending Stocks** (1000 MT) | 165 | 165 | 296 | 143 | 0 | 147 |
| **Total Distribution** (1000 MT) | 2141 | 2141 | 2371 | 2171 | 0 | 2197 |
| **Yield** (MT/HA) | 2 | 2 | 3 | 3 | 0 | 2 |
| *OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query* | | | | | | |

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

**Production**
For MY 2026/2027 (July–June), Colombia's wheat production is forecast at approximately 4,000 metric tons (MT) on an estimated harvested area of 1,800 hectares. Production remains limited and is concentrated in high-altitude areas of the departments of Boyacá, Cundinamarca, and Nariño, with Boyacá accounting for nearly 90 percent of national output in 2025. Wheat cultivation in Colombia is generally unprofitable due to low yields and challenging climatic conditions, and most farms are small, typically under two hectares, located between 2,800 and 3,200 meters above sea level. Domestic production mainly supplies local markets for traditional food products.

**Consumption**
In MY 2026/2027, Colombia's wheat consumption is forecast to reach approximately 2.02 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 kilograms in 2025, and nearly 70 percent of households consuming bread 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 2 MMT WGE, reflecting stable demand following the decline observed in previous years due to food inflation and weaker purchasing power. 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 the importance of wheat products in the national diet.[14]

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.[15] 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 use 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 slightly year-on-year to 2.05 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.

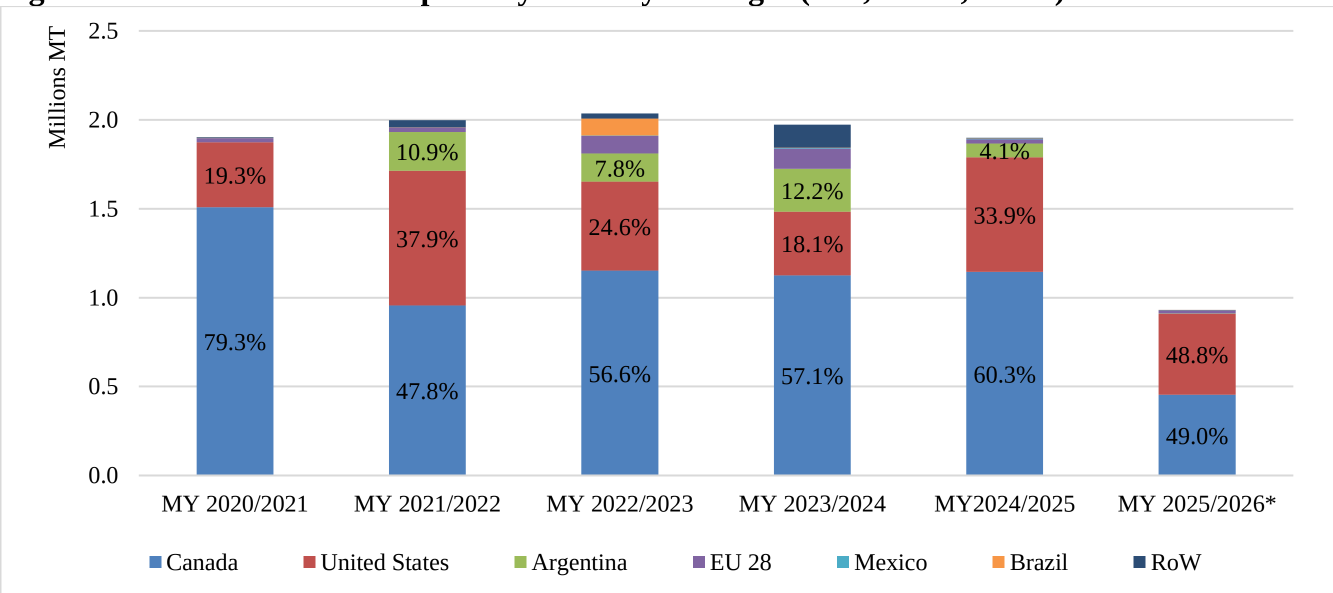
In MY 2025/2026 wheat imports are revised downward to 2.0 MMT WGE, reflecting softer demand, particularly from the animal feed sector, which has substituted wheat with more competitively priced feed ingredients such as corn and distillers grains. In addition, higher consumer taxes on certain processed wheat products have tempered import growth. Canada and the United States remain Colombia's principal wheat suppliers (Figure 10). 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.

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. 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.

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

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—often sourced from the United States—is typically used in the production of cookies and confectionery products.

**Figure 9. Colombia: Wheat Imports by Country of Origin (MY, MMT, WGE)**




**Data Source**: TDM.
**Note:** *MY 2025/2026 includes trade data from July to December 2025. Market share percentages included for Canada and the United States.

In MY 2026/2027, 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 product, followed by Mexico and the United States, while smaller volumes of wheat flour are also exported to Cuba. For MY 2025/2026, exports are estimated at 28,000 MT WGE, up from 26,000 MT WGE in MY 2024/2025. The increase 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 2026/2027 are projected at 147,000 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 temporarily suspending the APBS mechanism. In August 2025, the

government of Colombia published a decree that established zero-percent tariffs on wheat imports from all origins for two years[16], extending a policy first introduced in 2020 to mitigate global supply disruptions and elevated food prices during the COVID-19 pandemic. The continuation of this measure helps maintain stable wheat import flows and supports price stability for wheat-based food products.

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.

Regulatory requirements for wheat flour fortification remain unchanged. Since Decree 1944 of 1996, all wheat flour marketed in Colombia must be enriched with vitamin B1, vitamin B2, niacin, folic acid, and iron. Authorities started a review process of these standards in 2022 as part of a broader evaluation of nutrition policies, but no regulatory modifications have been adopted to date.

**Attachments:**

No Attachments

[16] 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.”