

MARKET PROFILE



Market profile

Cocoa from Colombia



Subject of the study:	Cocoa from Colombia
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Contents

I. INTRODUCTION.....	2
II. SCOPE OF THE STUDY.....	3
III. SUPPLY.....	4
1. Cocoa cultivation.....	4
2. Cocoa production.....	8
IV. TRADE.....	13
1. Trade in cocoa-related products.....	13
2. Focus on European import trends and markets.....	18
3. Focus on organic cocoa in the EU.....	22
V. MARKETS.....	24
1. Market prices.....	24
2. Market access – legal requirements.....	27
3. Certification and labels.....	29
VI. APPENDIXES.....	32



I. INTRODUCTION

This market profile was produced as part of the collaboration between the Committee Linking Entrepreneurship - Agriculture - Development (COLEAD) and Value Chain Analysis for Development (VCA4D). VCA4D is a partnership between Agrinatura and the European Commission, which aims to carry out agri-based value chain analyses in European Union (EU) partner countries.¹ The VCA4D objective is to assess the extent to which value chains contribute to inclusive economic growth and are socially and environmentally sustainable. This market profile evaluates the Colombian cocoa market at the local, regional and international levels.



Colombia is known for its coffee beans, but Colombian cocoa² beans also have renowned qualities. The quality is considered outstanding and 95% of Colombian cocoa is classified as “fino de aroma”³ (only 5% of world cocoa bean production has this designation).⁴ Cocoa is one of the main commodities cultivated in the country and has been grown for thousands of years. It is also a symbol of peace at a time of transition to a more peaceful country,⁵ and as a substitution for the coca culture with the potential to offer better livelihoods and quality of life to its farmers. This crop is essential for the development of the country and, as such, has been prioritised by government agricultural development policy.⁶

2 Cacao is the term often used for the raw bean that grows on the tree and at some point in the processing, it becomes cocoa, but the definition varies. For simplicity, this report uses the term ‘cocoa’ throughout.

3 International Cocoa Organization (2016) ICCO Panel recognizes 23 countries as fine and flavour cocoa exporters. <https://www.icco.org/icco-panel-recognizes-23-countries-as-fine-and-flavour-cocoa-exporters/>

4 Rodriguez-Medina, C., Arana, A.C., Sounigo, O., Argout, X., Alvarado, G.A. and Yockteng, R. (2019) Cacao breeding in Colombia, past, present and future. *Breeding science*, 69(3): 373–382.

5 USDA (2016) Cacao for Peace Overview. Global Agricultural Information Network Report. United States Department of Agriculture. [https://apps.fas.usda.gov/newgainapi/api/report/downloadreportbyfilename?filename=Cacao%20for%20Peace%20\(CFP\)%20Overview_Bogota_Colombia_7-28-2016.pdf](https://apps.fas.usda.gov/newgainapi/api/report/downloadreportbyfilename?filename=Cacao%20for%20Peace%20(CFP)%20Overview_Bogota_Colombia_7-28-2016.pdf)

6 Thompson, A. (2022) How Colombia aims to build its cocoa market. Candy Industry online. <https://www.snackandbakery.com/articles/100203-how-colombia-aims-to-build-its-cocoa-market>

1 Jones, S. (2022) VCA4D Methodology. European Union. <https://europa.eu/capacity4dev/value-chain-analysis-for-development-vca4d-/wiki/1-vca4d-methodology>

II. SCOPE OF THE STUDY

This market profile takes into account all imported and exported food products containing cocoa. Table 1 provides information on the different commodities analysed for this profile and their respective codes according to the Harmonized Commodity Description and Coding System (HS).

Table 1: HS codes used for this profile

	HS code	Commodity name
Fresh or raw cocoa	18010000	Cocoa beans, whole or broken, raw or roasted
	18020000	Cocoa shells, husks, skins and other cocoa waste
Processed cocoa	18031000	Cocoa paste (excluding defatted)
	18032000	Cocoa paste, wholly or partly defatted
	18040000	Cocoa butter, fat and oil
	18050000	Cocoa powder, not containing added sugar or other sweetening matter
	180610	Cocoa powder, sweetened
Chocolate	180620	Chocolate and other food preparations containing cocoa, in blocks, slabs or bars weighing > 2 kg or in liquid, paste, powder, granular or other bulk form, in containers or immediate packings of a content > 2 kg (excluding cocoa powder)
	18063100	Chocolate and other preparations containing cocoa, in blocks, slabs or bars of <= 2 kg, filled
	180632	Chocolate and other preparations containing cocoa, in blocks, slabs or bars of <= 2 kg (excluding filled)
	18069011	Chocolate and chocolate products in the form of chocolates, whether or not filled, containing alcohol
	18069019	Chocolate and chocolate products in the form of chocolates, whether or not filled, not containing alcohol
	18069031	Chocolate and chocolate products, filled (excluding in blocks, slabs or bars and chocolates)
	18069039	Chocolates and chocolate products, unfilled (excluding in blocks, slabs or bars, chocolates)



III. SUPPLY

1. Cocoa cultivation

Three main families of cocoa are grown globally: Criollo, Forastero and Trinitario (a hybrid variety, cross-bred as a mixture of the first two). In Colombia, as in other parts of Latin America, most cocoa beans are from the Criollo family. The Trinitario variety is also quite common, while the Forastero type is produced only in small quantities.⁷ Most of the cocoa produced in Colombia is speciality cocoa, considered among the finest beans in the world. Colombia has excellent genetic diversity and suitable ecology for cocoa production, which encourages the development of this crop.⁸ There are also many new hybrid varieties being developed and promoted, but these are not always traceable or certified, which could affect overall productivity and quality.⁹

Concerning the cocoa value chain from production to processing, several local and multinational chocolate-producing companies have partial ownership and control of the early production stages, such as fermenting, by industrialising it to increase product quality.

Traditionally the early stages of the cocoa processing happen on the farm. First, the pods are harvested and split to extract the pulp and beans, which are wrapped in leaves and left to ferment for four to seven days depending on the variety. The beans are then separated and sun-dried for around 10 days before being transported to the local mill for cleaning, grading and onward shipment to the manufacturer (Figure 1).

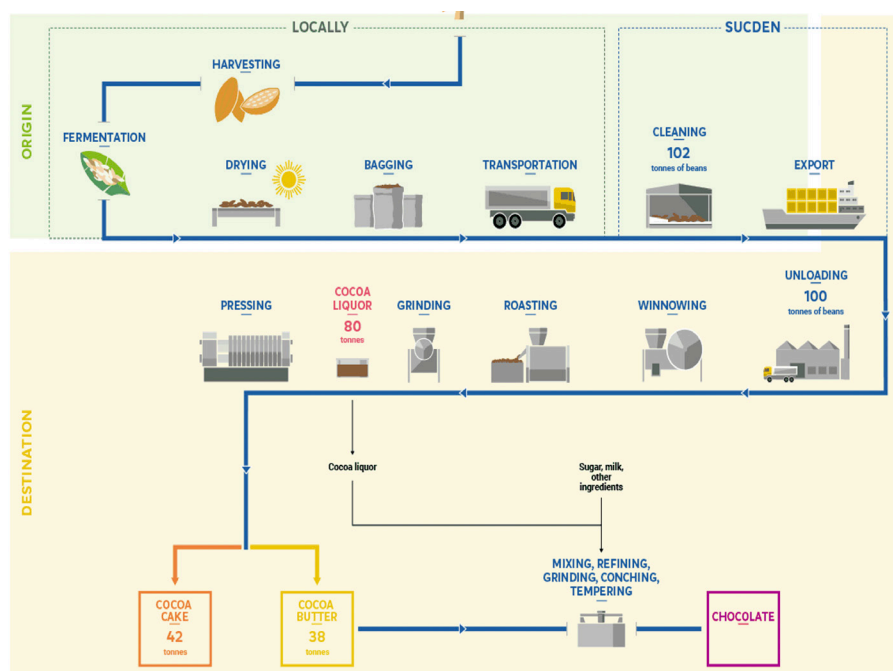


Figure 1. Cocoa process chart. Source: Sucden.¹⁰

7 Pelecanus (2021) Cocoa Guide Colombia – Features and Producers. <https://pelecanus.com.co/en/colombia-cocoa-guide/>

8 Invest in Colombia (undated). Cocoa, by-products and chocolate. <https://investincolombia.com.co/en/sectors/agricultural-products-food-production/cocoa-by-products-and-chocolate>

9 Perez, M.A., Cajiao, S. and Cuervo, C.J. (2019) Diagnostico de la Cadena del Cacao (2019). https://www.colombiamascompetitiva.com/wp-content/uploads/2021/09/CC_Guia-diagnostico-de-la-cadena-de-cacao-140721.pdf

10 Sucden (undated) Cocoa process chart. https://www.sucden.com/media/1364/cocoa_process_flowchart.pdf

According to a fine cacao importer based in Belgium, many Colombian producers currently suffer inconsistency in the fermentation process, which causes variations in the quality of the cacao beans and influences the flavour of the final product. Also, producers and cooperatives have difficulties in accessing export markets directly, being required to use an intermediary.¹¹

In the Tumaco region, the cacao is produced on community land, which is managed by indigenous people, whose community council decides on land use options. This region is interesting since there are old cocoa plants of the so-called “regional” variety, which have been abandoned for years because the land was within a conflict zone and difficult to access.

Once the cocoa reaches the manufacturer’s factory, the beans are roasted. Then the shells are crushed and removed in a wind-blown process known as winnowing, which isolates the seeds, called nibs. By this stage the flavours and aromas of chocolate are very recognisable. The nibs are ground into a thick brown liquid called cocoa liquor and further processed into the cocoa powder and butter used in chocolate confectionery, drinks and cooking. Exports to the EU are mainly in the form of dried beans or semi-finished products. Before the COVID-19 pandemic, global demand for chocolate was expected to grow by an estimated average annual rate of 3.4% to 4.5% up to 2024.¹² Figure 2 illustrates the stages of production of semi-finished cocoa products and chocolate.

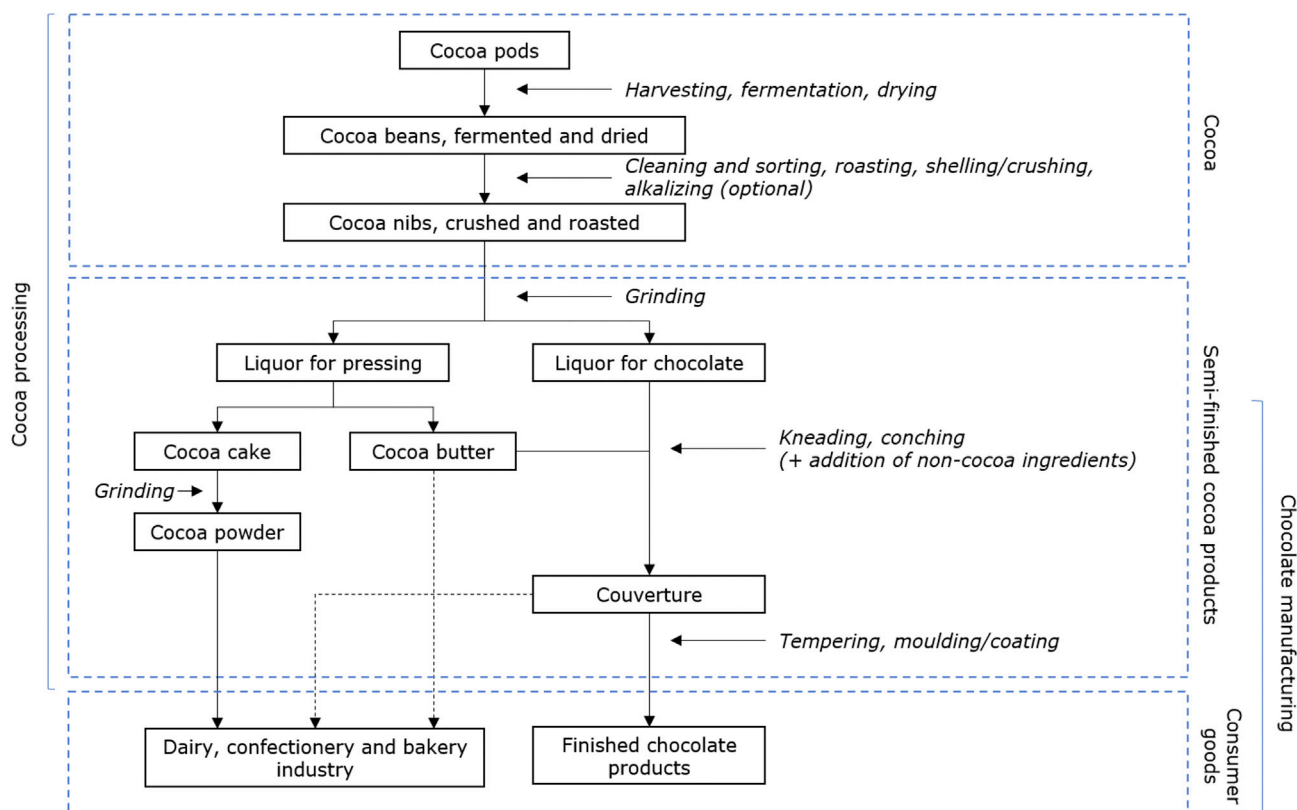


Figure 2. Stages of production of semi-finished cocoa products and chocolate.

Source: CBI adapted from UNCTAD (2008)¹³

¹¹ From an interview with Patricia Forero, Legast Chocolatier (2022).

¹² CBI (2021) The European market potential for semi-finished cocoa products. <https://www.cbi.eu/market-information/cocoa-cocoa-products/semi-finished-cocoa-products/market-potential>

¹³ CBI (2020) Entering the European market for speciality cocoa. European Union Centre for the Promotion of Imports from Developing Countries. <https://www.cbi.eu/market-information/cocoa-cocoa-products/speciality-cocoa/market-entry>.



According to the Ministry of Agriculture, about 52,000 families depend on cocoa culture in Colombia with 188,370 ha planted in 2020.¹⁴ Around 95% of the producers are considered as small scale. On average each farmer has only around 3 ha which creates two main issues: low yields and heterogeneous post-harvest processes, which affect the overall quality of the cocoa beans. In Colombia, cocoa yields average 450 kg per ha, however in some regions like Nariño, the yield reaches only 230 kg per ha. The reasons are numerous and include the age of the trees and poor management of the plantations. On the positive side, cacao “fino de aroma” is mainly produced in this area, and there is great potential for yield and quality improvement.¹⁵ Colombia also has an untapped potential, with an estimated 4 million ha of land potentially suitable for cocoa plantations. The government has set a strategy to renew 70,000 ha of plantations with new hybrid

clones, and this should increase productivity while maintaining good quality cocoa. The clones are not only productive, but also contain particular flavours. Particularly in the Tumaco region, a mass selection effort was conducted on the cocoa trees by Fedecacao¹⁶ by evaluating resistance to disease, productivity, and physical and organoleptic qualities of genotypes to increase the quality of local production.¹⁷ With the support of Swiss contacts, a post-harvest centre has been installed in the region.

Cocoa plantations are also being promoted with the objective of replacing current coca plantations, especially in the southern regions where most of the past conflicts were located. However, the wages paid to producers are often too low, and they can earn three times less than they earn when cultivating coca leaves; farmers also have more work to do with a cocoa plantation.¹⁸ This causes instability in

14 Ministry of Agriculture. (2021) Colombia registró la mayor producción de cacao de la historia, en el último año cacaotero. <https://www.minagricultura.gov.co/noticias/Paginas/Colombia-registr%C3%B3-la-mayor-producci%C3%B3n-de-cacao-de-la-historia,-en-el-%C3%BAltimo-a%C3%B1o-cacaotero.aspx>

15 Ministry of Agriculture. (2021) Colombia registró la mayor producción de cacao de la historia, en el último año cacaotero. <https://www.minagricultura.gov.co/noticias/Paginas/Colombia-registr%C3%B3-la-mayor-producci%C3%B3n-de-cacao-de-la-historia,-en-el-%C3%BAltimo-a%C3%B1o-cacaotero.aspx>

16 Fedecacao is the Federation of Cacao Producers, the main local organisation that advocates for the cacao producers. Fedecacao also represents Colombia before the International Cocoa Organization of which Colombia has been a member since December 2021.

17 Rodriguez-Medina, C., Arana, A.C., Sounigo, O., Argout, X., Alvarado, G.A. and Yockteng, R. (2019) Cacao breeding in Colombia, past, present and future. *Breeding science*, 69(3): 373–382.

18 Cacao Hunters. (2020) Tumaco: El sabor intenso de la perla del pacífico. <https://www.cacaohunters.com/blogs/tierras-del-cacao/tumaco-el-sabor-intenso-de-la-perla-del-pacifico>

a long-term strategy.

Colombian cocoa is used in the manufacturing of high-quality chocolates and chocolates with very low cocoa content, both of which are popular within the country and in the region. Two main local companies buy most (over 80%) of the current cocoa production: Nacional de Chocolates and Luker Cacao. Currently, fine aroma cocoa is being threatened in Latin American countries by the introduction and expansion of an improved clone, named CCN51, which is more productive and grown under monoculture conditions. Monoculture plantations may provide increased yield but require more agrochemical inputs and tend to be more susceptible to drought, soil erosion and land degradation. The organoleptic characteristics of CCN51 beans are often less appreciated, which translates into lower prices than for the national cocoa variety. However, properly fermented beans, even of lower quality, can have interesting results

with a good post-harvest process.

Higher prices through certification programmes often fail to sufficiently compensate for the yield gap between shaded and monoculture plantations, as they are not always accessible to smallholder farmers. The important role played by agroforestry systems for biomass production and biodiversity conservation in agricultural landscapes has, however, been demonstrated. Continuous efforts are therefore needed to allow smallholder farmers to be included in certification programmes and other supporting mechanisms, such as carbon funding, to preserve traditional shaded cocoa production systems.¹⁹

The organisation of small-scale farmers into groups is one way to facilitate access to certification or other financial incentives for sustainable practices.



¹⁹ Middendorp, R.S., Vanacker, V. and Lambin, E.F. (2018) Impacts of shaded agroforestry management on carbon sequestration, biodiversity and farmers' income in cocoa production landscapes. *Landscape Ecology* 33(2).

2. Cocoa production

Cocoa bean production

Colombia has historically been among the top 10 global producers of cocoa beans. Following a stable production volume averaging 42,000 tonnes per year between 2002 and 2016, production increased between 2017 and 2019, peaking at 102,000 tonnes in 2019 and decreasing again to 63,000 tonnes in 2020 (Figure 3). Most cocoa bean production in Colombia occurs in the Santander region, which accounts for 42% of national production. Other important regions are Antioquia (9%), Arauca (8%), Huila (7%), Tolima (7%) and Nariño (5%) (Figure 4).²⁰

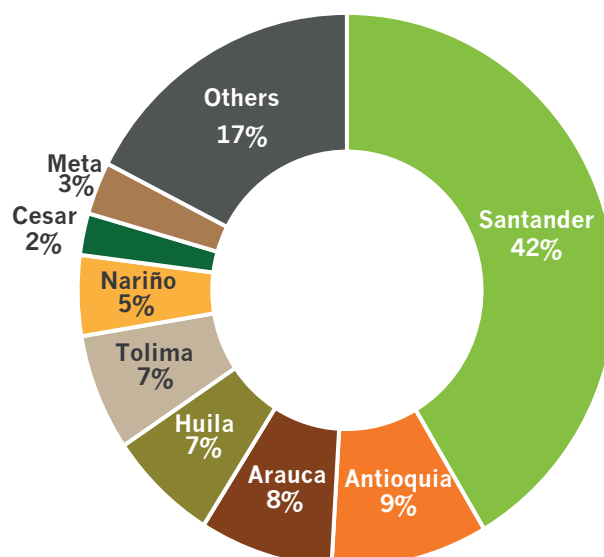


Figure 4. Main cocoa producing regions.
Source: COLEAD, based on Fedecacao.

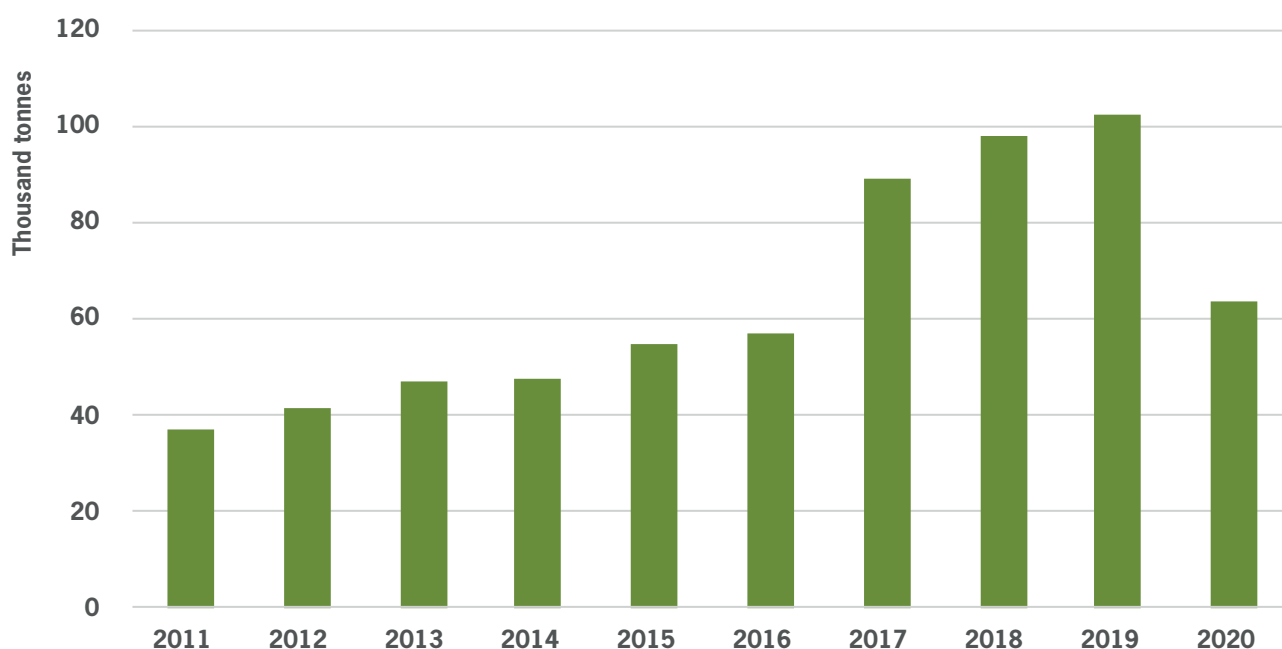


Figure 3. Annual production volumes of cocoa beans between 2011 and 2020 for Colombia only.
Source: COLEAD, based on FAOSTAT.

²⁰ Ministry of Agriculture. (2021) Colombia registró la mayor producción de cacao de la historia, en el último año cacaotero. www.minagricultura.gov.co/noticias/Paginas/Colombia-registr%C3%B3-la-mayor-producci%C3%B3n-de-cacao-de-la-historia,-en-el-%C3%BAltimo-a%C3%B1o-cacaotero.aspx

In 2020 the top 10 cocoa-producing countries (Figure 5) accounted for 91% of global cocoa bean production. Côte d'Ivoire is by far the largest producer, accounting for almost 40% of total global production in 2019. Of the top 10 producers, only Nigeria experienced a decrease in production between 2011 and 2020 (-13%). Over the same period, Colombia showed the third largest relative increase in production (total growth rate of 70%) after Peru (184%) and Ecuador (164%).

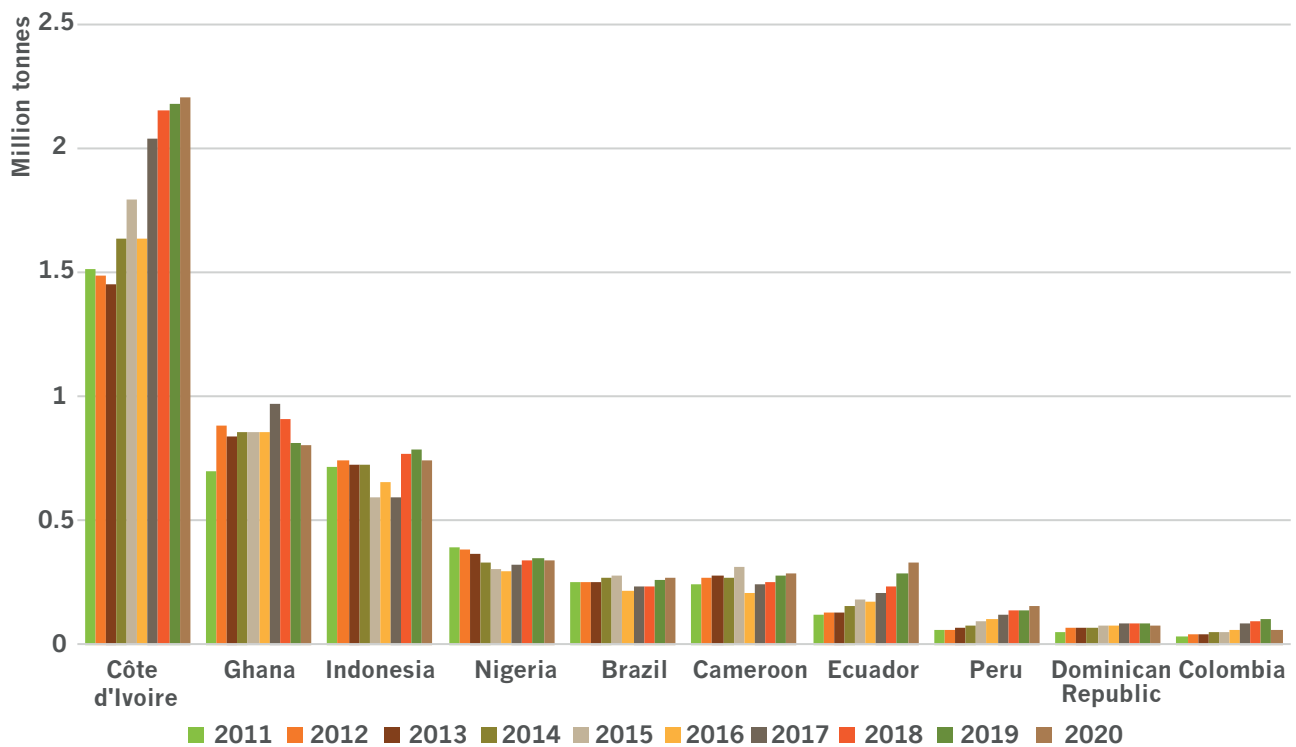


Figure 5. Top 10 global cocoa bean producers. Annual production volumes between 2010 and 2020. Source: COLEAD, based on FAOSTAT.

A comparison of the different world regions (Figure 6) reveals that sub-Saharan Africa produced about two thirds of all cocoa beans in 2020, while Asia and Latin America each produced about half of the remaining third. Although production has grown faster in Latin America than in Asia, these shares have remained relatively similar over the last 20 years.

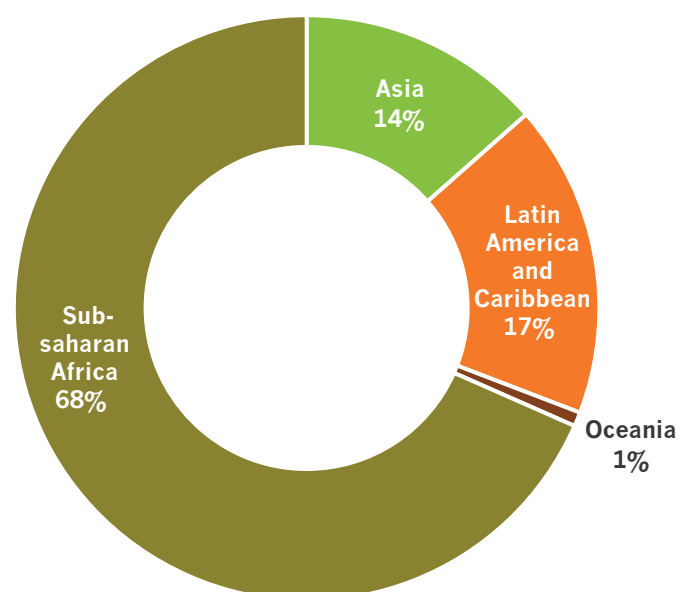


Figure 6. Share of cocoa production by world region in 2020 (total global production of 5.75 million tonnes). Source: COLEAD, based on FAOSTAT.

At the regional level, Brazil, Ecuador, Peru and the Dominican Republic are Colombia's largest competitors. Colombia is the fifth largest cocoa bean producer in the South America and Caribbean region, producing more than Mexico since 2012 and more than the Dominican Republic between 2017 and 2019. Colombian production registered a drop in 2020, while the same is not observed for all neighbouring countries (Figure 7).

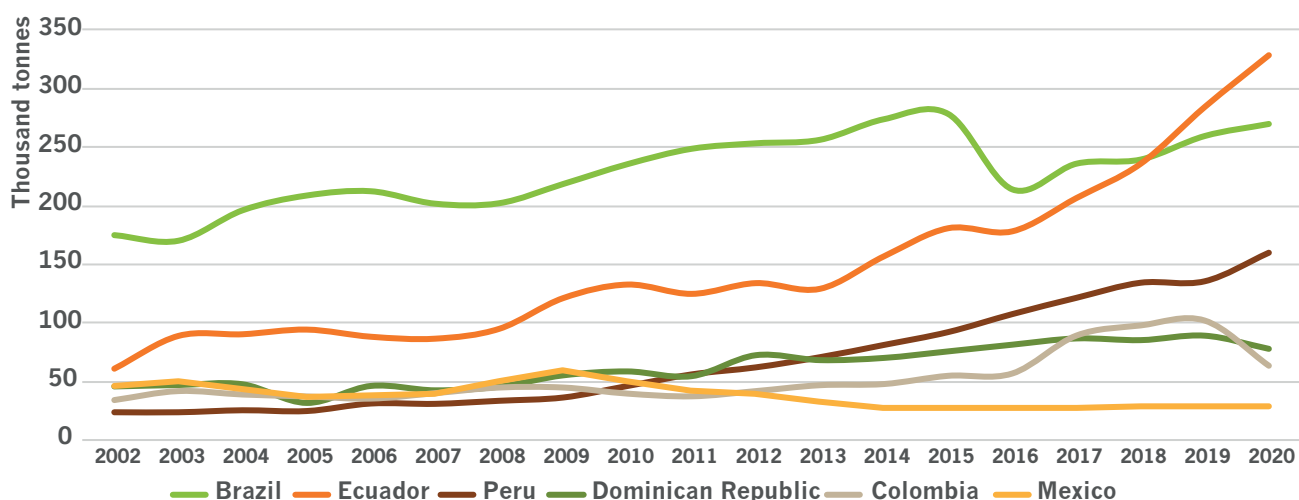


Figure 7. Cocoa bean production between 2002 and 2020 for the top six cocoa producers in the South America and Caribbean region. Source: COLEAD, based on FAOSTAT.

With 12.8 million ha available with potential for cocoa cultivation and only 176,000 ha currently being cultivated²¹, Colombia has high potential to increase its production in the coming years.

Semi-finished cocoa products (cocoa paste, cocoa butter, cocoa powder)

Semi-finished cocoa products include cocoa paste (defatted or not), cocoa butter and cocoa powder (sweetened or not). The top global exporters of semi-finished cocoa products are the Netherlands, Côte d'Ivoire, Indonesia, Malaysia, Germany, Ghana and France, which together exported about 75% of the volume of all semi-finished cocoa products worldwide in 2020. In 2020, Colombia was in 32nd place globally, after Uruguay and before Austria. In 2020, Colombia exported 7,400 tonnes of semi-finished cocoa products, representing only 0.2% of the global total. That year, Colombia ranked in sixth place in the Latin America and Caribbean region list of main exporters (Figure 8).

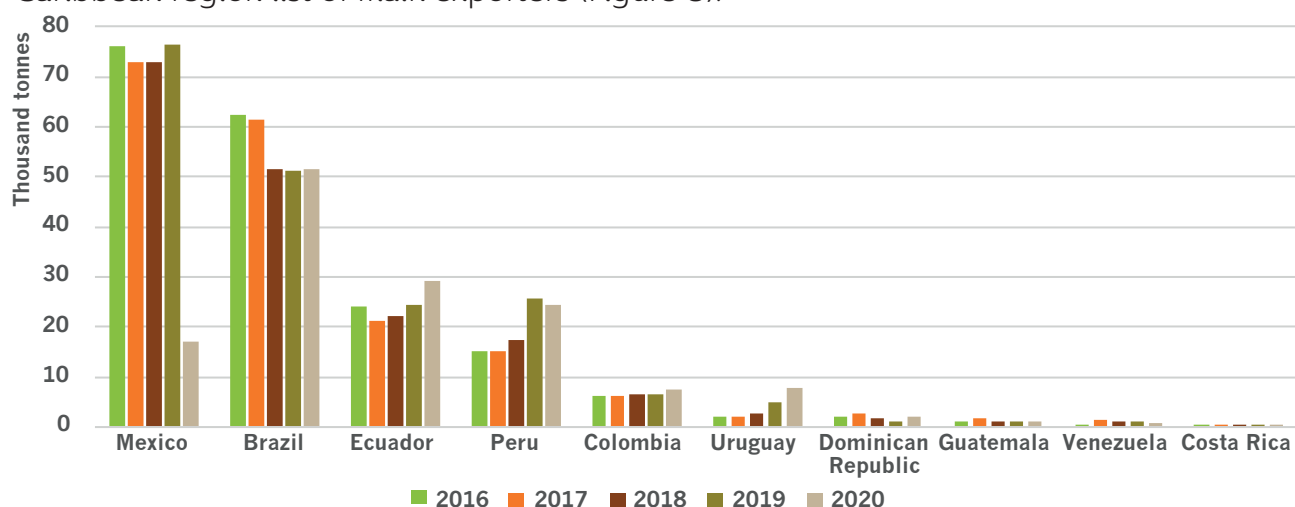


Figure 8. Top 10 exporters of semi-finished cocoa products (HS 180310, 180320, 180400, 180500 and 180610) in the Latin America and Caribbean region between 2015 and 2020. Source: COLEAD, based on CEPII BACI.

²¹ Thompson, A. (2022) How Colombia aims to build its cocoa market. Candy Industry online. <https://www.snackandbakery.com/articles/100203-how-colombia-aims-to-build-its-cocoa-market>

Chocolate production

It is hard to find figures for the total annual production of chocolates and other preparations containing cocoa in each country, but the world's leading producers can be identified based on raw bean imports and chocolate exports. Figure 9 shows that the Netherlands was the world's largest importer of cocoa-based ingredients in 2020; besides producing chocolate, it mainly operates as a hub country for cocoa beans in Europe. Germany, Belgium, Italy, France, Canada and the United States of America (USA) are the other top producers of chocolate products historically. These countries are ranked high in terms of imports of cocoa-based chocolate ingredients and exports of chocolate.

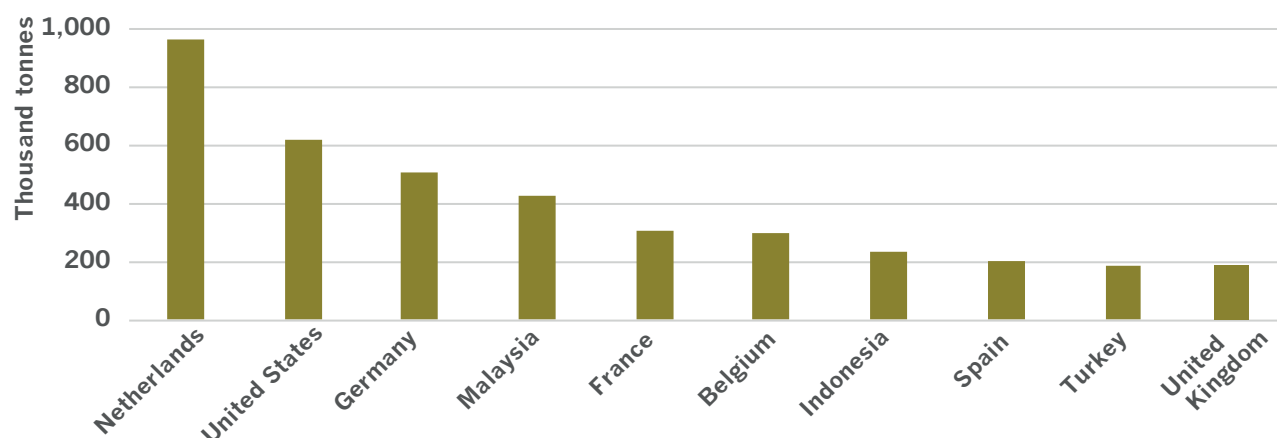


Figure 9. Top 10 importers of ingredients used for production of chocolates (cocoa beans, paste, butter and liquor; HS 180100, 180200, 180310, 180320 and 180400) in 2020. Source: COLEAD, based on CEPII BACI.

Recently, however, chocolate production has increased significantly in Eastern Europe (Poland and the Russian Federation) and Asia (Turkey), resulting in the appearance of these countries among the top 10 global exporters of chocolate (Figure 10). Colombia ranks 41st out of 188 chocolate exporters listed in the CEPII BACI trade database for 2020, with chocolate exports of about 13,000 tonnes. Although Colombia was the fifth largest producer of cocoa beans in the Latin America and Caribbean region in 2020, it ranks third in terms of exports of chocolates and other food preparations containing cocoa in the region (Figure 11).

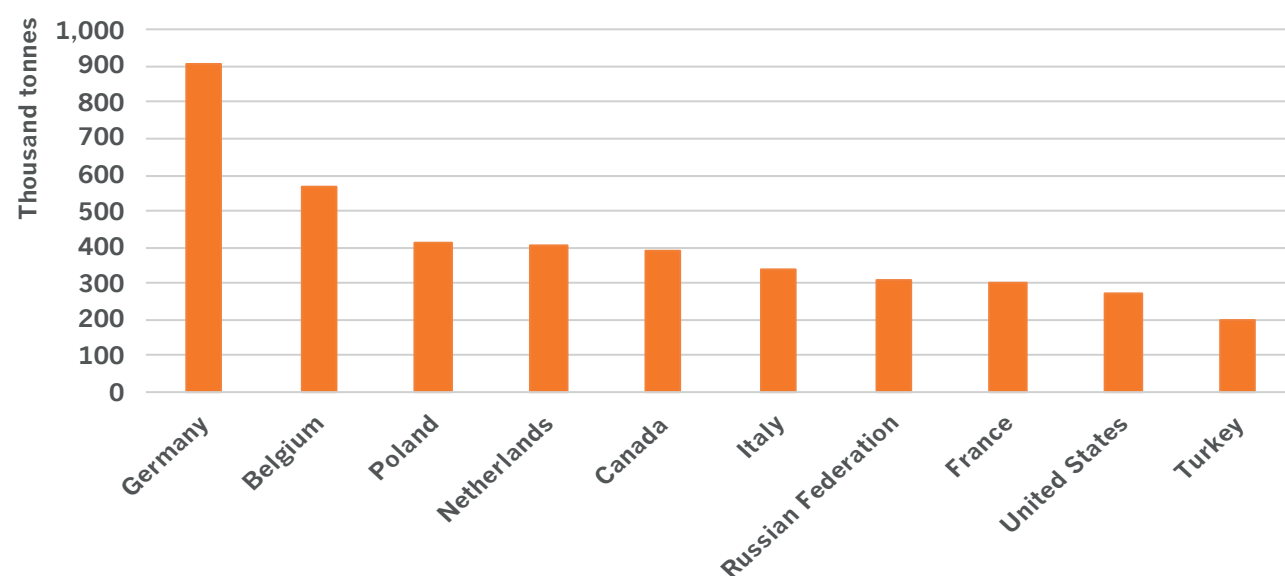
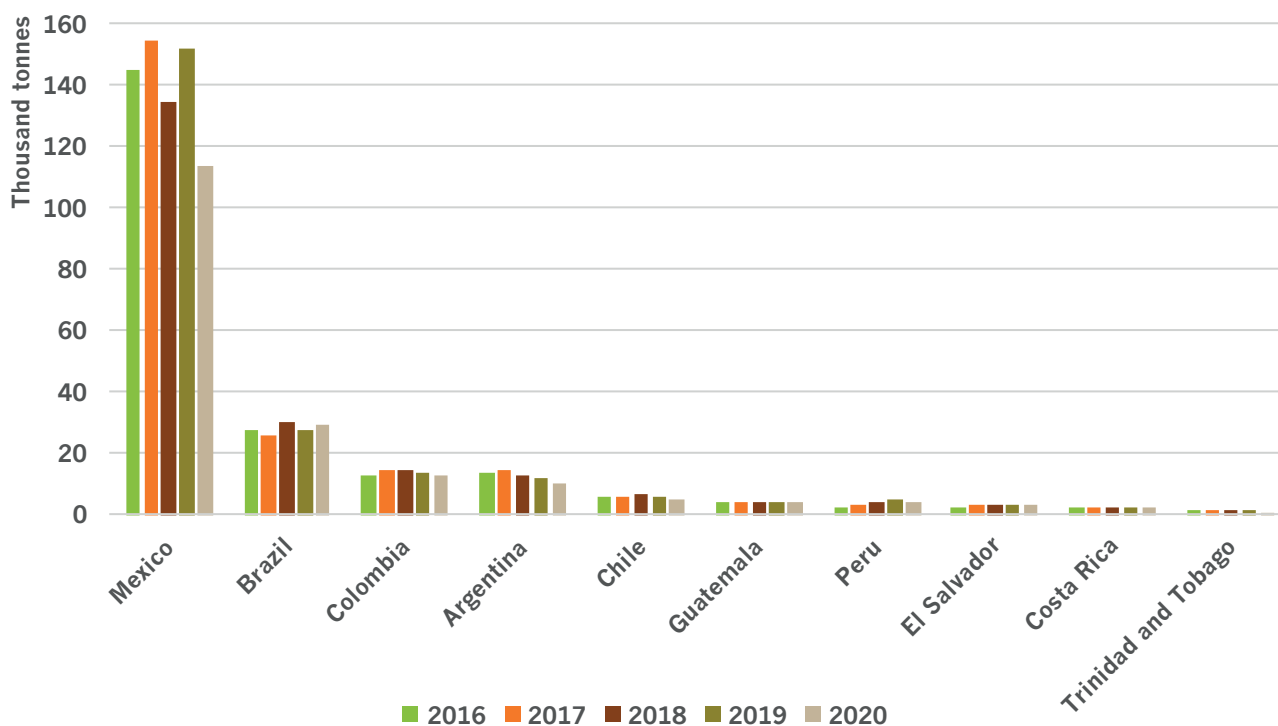


Figure 10. Top 10 exporters of chocolates and food preparations including cocoa (HS 180620, 180631, 180632 and



180690) in 2020. Source: COLEAD, based on CEPII BACI.

Figure 11. Top 10 exporters of chocolates and food preparations containing cocoa (HS 180620, 180631, 180632 and 180690) in the Latin America and Caribbean region between 2016 and 2020. Source: COLEAD, based on CEPII BACI.

Most of the world's finished chocolate products are supplied by seven multinational companies: Ferrero, Hershey, Lindt & Sprüngli, Mars, Meiji, Mondelez and Nestlé.

A non-exhaustive list of Colombian chocolate producers can be found in Appendix 2.



IV. TRADE

1. Trade in cocoa-related products

Cocoa beans

Traditionally the EU27+the United Kingdom (UK) and North America have been the main importers of cocoa beans. Recently, Asian countries (such as Indonesia, Japan, Malaysia and Singapore) have been increasing imports of cocoa beans from other regions (Figure 12). Asia became the second largest importer of cocoa beans in 2016, while the EU remained by far the largest. Over the 19 years spanning 2002–2020, European cocoa bean imports continued to grow at a compound annual growth rate (CAGR) of 3%. Asian imports from other regions decreased between 2002 and 2010 at a CAGR of -7%, then started to grow strongly at an impressive CAGR of 12%.

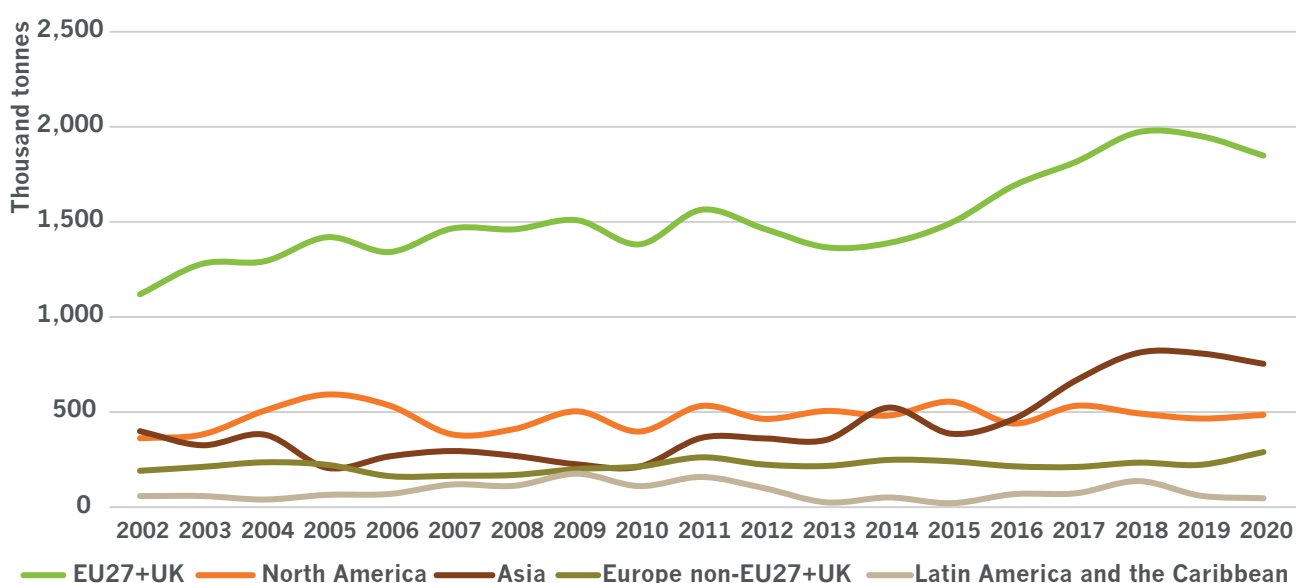


Figure 12. Import volumes (excluding intraregional trade) of raw or roasted, whole or broken cocoa beans (HS 180100) in the top five cocoa bean importing regions between 2002 and 2020. Source: COLEAD, based on CEPII BACI and Eurostat.



When considering Latin American and Caribbean cocoa bean exports in detail, the above-mentioned trends become even more evident. Since 2010, exports to Asia (mainly Indonesia, Japan and Malaysia) have grown rapidly (at a CAGR of 26% between 2010 and 2020), and Asia has been the main export destination for Latin American and Caribbean cocoa beans since 2018 (Figure 13). Exports to the EU and North America grew at a CAGR of 7% and 4%, respectively between 2002 and 2020, but since 2015 they have more or less stagnated, with only imports by North America showing a slight increase in 2020.

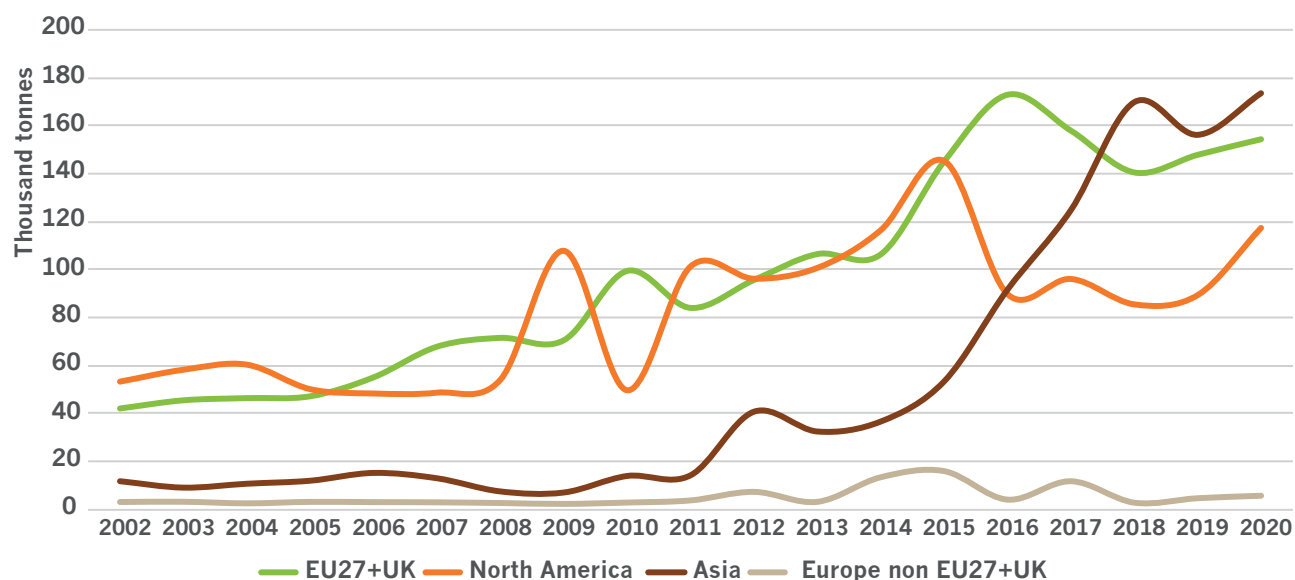


Figure 13. Imports (excluding intraregional trade) of raw or roasted, whole or broken cocoa beans (HS 180100) from Latin America and the Caribbean region to the top five cocoa bean importing regions between 2002 and 2019. Source: COLEAD, based on CEPII BACI and Eurostat.

These general trends seem to apply less to Colombian cocoa bean exports, as exports to Asia were stable between 2015 and 2019 and decreased in 2020. On the other hand, exports to Latin America and the Caribbean have increased exponentially since 2018 (CAGR of 18% between 2013 and 2020), reaching 9,000 tonnes in 2020, mainly to Mexico. The EU was the historical main market, peaking at 7,100 tonnes in 2016 and 2017, but exports to this region have decreased greatly since 2017, reaching only 1,200 tonnes in 2020 (Figure 14).

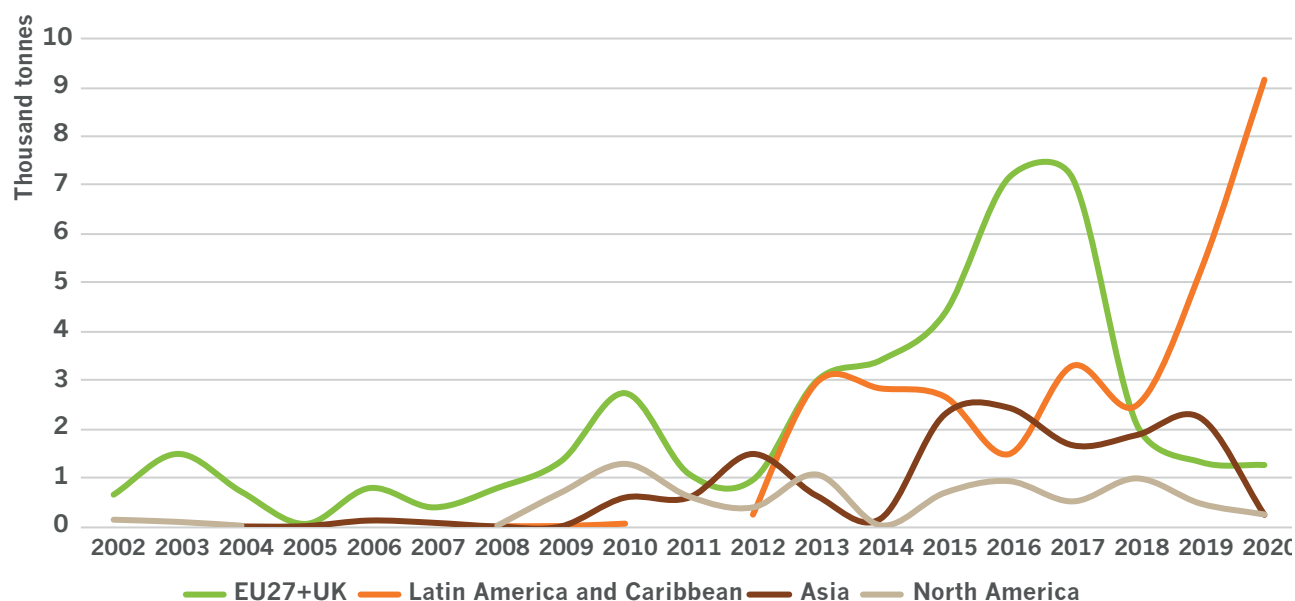


Figure 14 : Imports of raw or roasted, whole or broken cocoa beans (HS 180100) from Colombia by the top four importing regions between 2002 and 2020. Source: COLEAD, based on CEPII BACI and Eurostat.

As shown in Figure 15, the destination markets for Colombian cocoa bean exports were dominated by Mexico in 2020, which represented 82% of exports at 8,900 tonnes. Belgium and Italy accounted for the next 8% of Colombia's cocoa bean exports. Asian countries are further down the list, as well as the USA. There are only slight differences in the value shares compared to the volume shares. For example, Mexico's value share is slightly lower than its volume share (76% compared to 82%), suggesting that it imports more low-grade or uncertified cocoa beans, while the opposite is true for importers such as Belgium and Italy. Export markets have evolved; in 2010 Spain and the USA represented about half of the destination market, with Mexico increasing in importance from 2012 onwards, with imports growing exponentially since 2018.

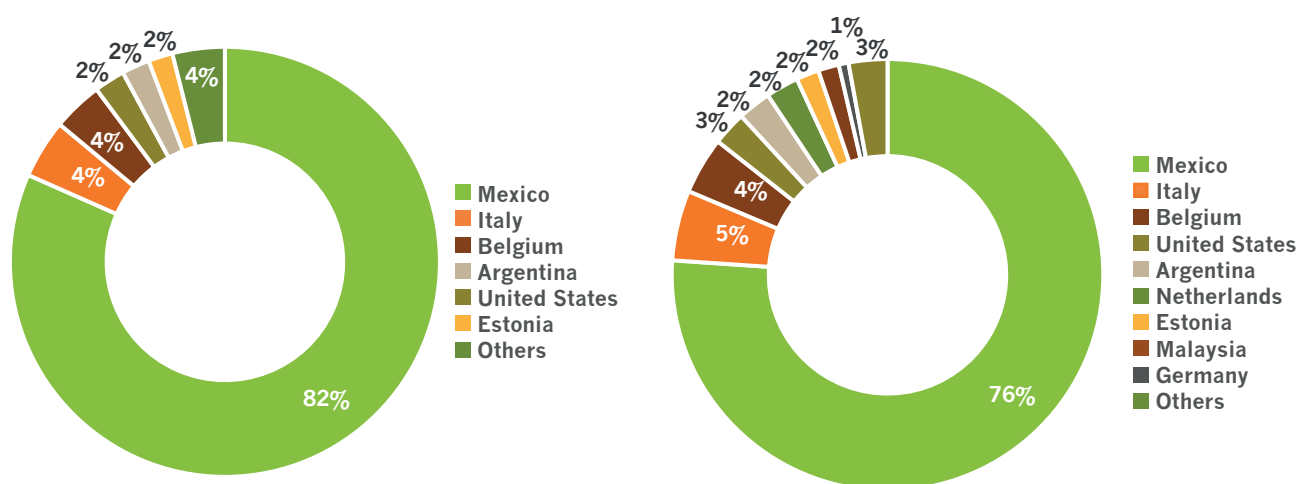


Figure 15. Volume share (left) and value share (right) of total Colombian cocoa bean (HS180100) export volumes (10,900 tonnes) and value (US\$28,700) by destination country in 2020. Source: COLEAD, based on CEPII BACI and Eurostat.



Semi-finished cocoa products

Semi-finished cocoa products exported by Colombia (7,400 tonnes in 2020) include cocoa paste (defatted or not), cocoa butter and cocoa powder (sweetened or not). As shown in Figure 16, , the main destination region for semi-finished Colombian cocoa products is Latin America and the Caribbean (43% of the total export volume in 2020), with the top five destination markets being Mexico, Costa Rica, Trinidad and Tobago, Argentina and Peru (this is similar to exports of Colombian cocoa beans). Exports to Latin America and the Caribbean have decreased since the peak in 2005 of more than 8,500 tonnes, with a CAGR of -7% between 2005 and 2020. Exports to the EU represented 32% of total export volume in 2020, at more than 2,000 tonnes, with Germany and the Netherlands representing more than 88% of this volume. Exports to the EU have varied at between 1,000 and 2,000 tonnes since 2002. Exports to North America follow a similar evolution but with smaller quantities, with only 800 tonnes exported to North America in 2020, representing 16% of total exports from Colombia, decreasing since 2002 with a CAGR of -3%. In terms of destination countries, the main destination in 2020 was the Netherlands, followed by the USA and Germany (Figure 17). This means that exports to Latin America and

the Caribbean are distributed more between different countries, rather than to one main hub. Contrary to global exports of cocoa beans, where Asia is becoming the main market, Colombian exports of semi-finished cocoa products to Asia are very low, at less than 50 tonnes in 2020.

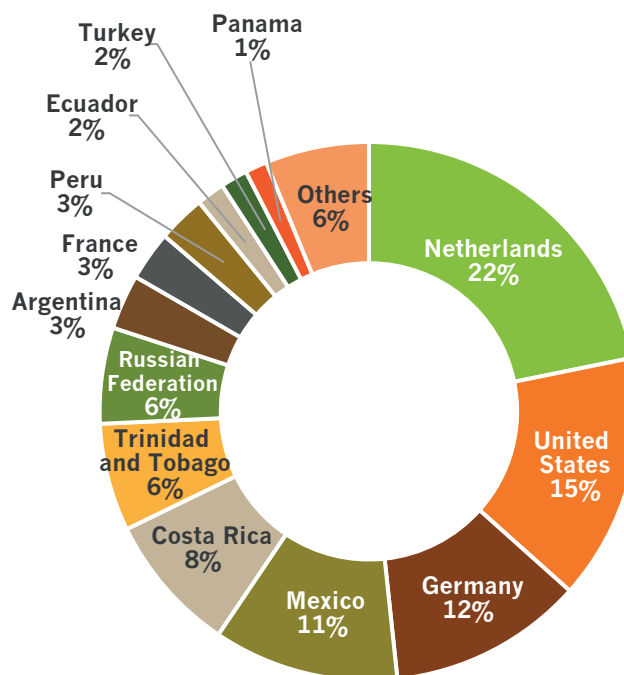


Figure 17. Volume share of total exports of Colombian semi-finished cocoa products (HS 180310, 180320, 180400, 180500 and 180610) (7,400 tonnes in 2020) by destination country in 2020. Source: COLEAD, based on CEPII BACI.

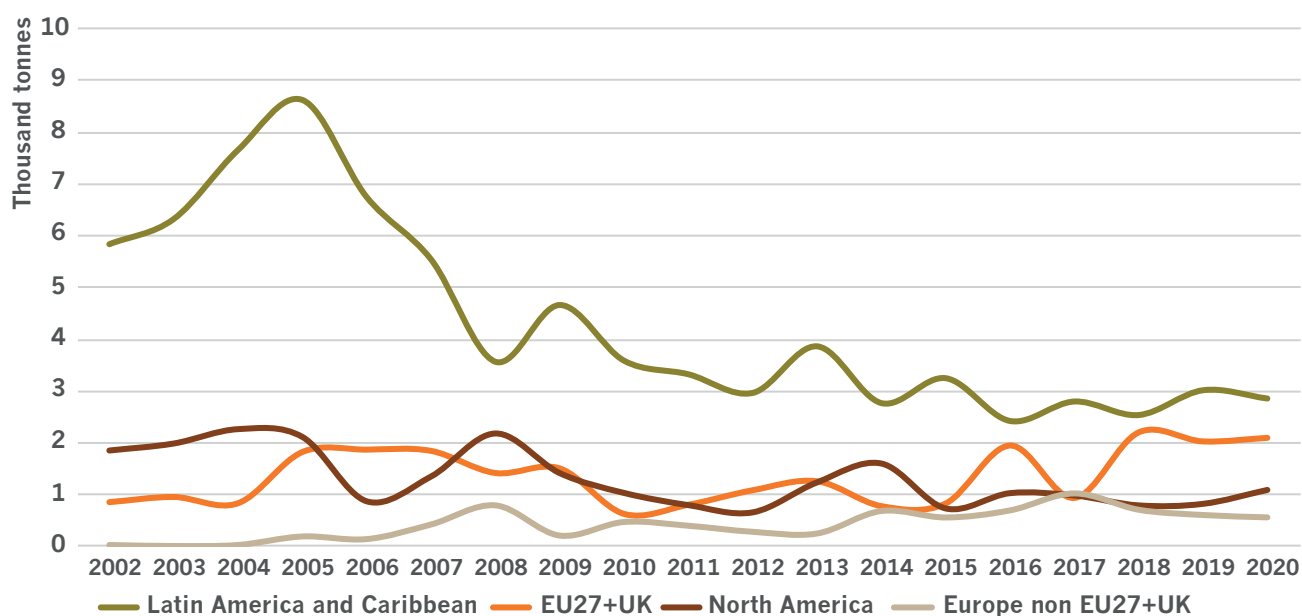


Figure 16. Volume of exports of Colombian semi-finished cocoa products (HS 180310, 180320, 180400, 180500 and 180610) to the top four destination regions between 2002 and 2020. Source: COLEAD, based on CEPII BACI and Eurostat.



Chocolate and food preparations containing cocoa

As seen in Figure 11, Colombia is the third largest exporter of processed cocoa-based food products (almost 13,000 tonnes in 2020) in the Latin America and Caribbean region. Exports are destined mainly for other Latin American countries (66% of the total export volume in 2020), such as Chile, Ecuador, Mexico, Panama and Peru. Exports to the Latin America and Caribbean region increased

between 2002 and 2020 with a CAGR of 3%, the trend being led mainly by exports to Venezuela, which was the main export market until 2012. Exports to sub-Saharan Africa (mainly South Africa) have increased up to 2009, being stable until 2014 and decreasing since then with a CAGR of -27% to only 500 tonnes in 2020. Exports to North America have increased during the period studied, exceeding those to sub-Saharan Africa since 2016, and growing with a CAGR of 6% between 2002 and 2020 (Figure 18).

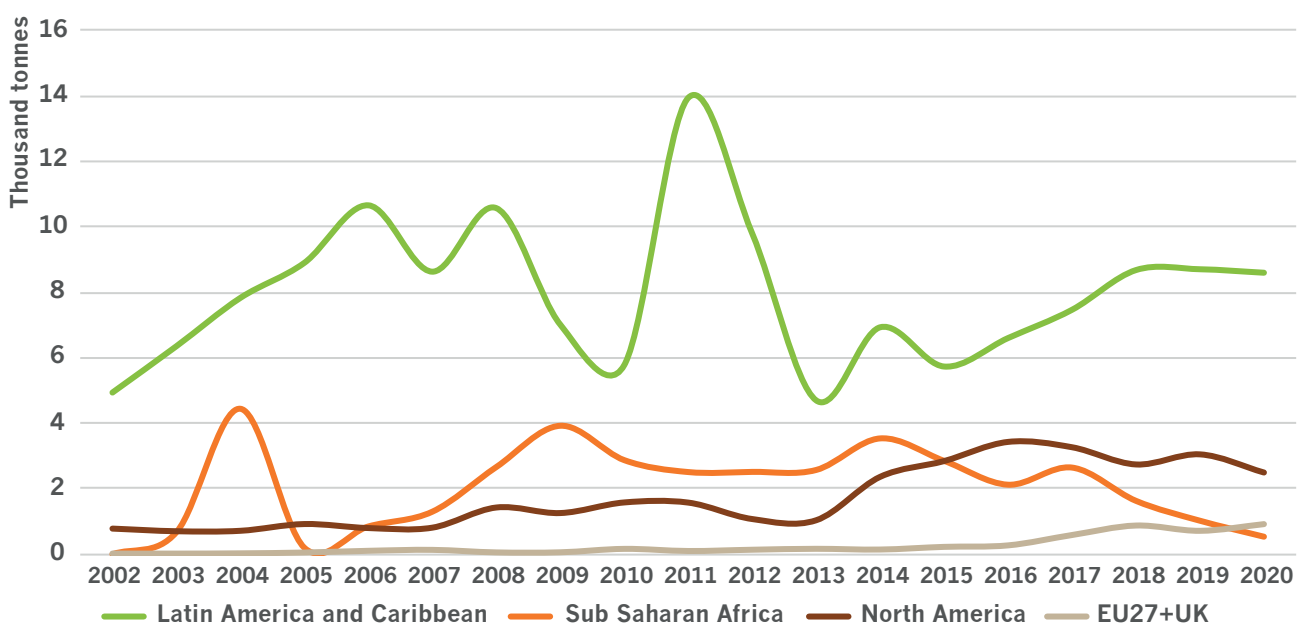


Figure 18. Volumes of exports of Colombian chocolate and other food preparations containing cocoa (HS 180620, 180631, 180632 and 180690) to the top four destination regions between 2002 and 2020. Source: COLEAD, based on CEPII BACI.

2. Focus on European import trends and markets

The European market for cocoa and chocolate comprises 90% bulk cocoa and 10% speciality cocoa. European countries have the highest per capita consumption of chocolate in the world. Consumers want more cocoa content and higher-quality chocolate, which provides opportunities for other producing countries to enter the European market.²² Europe is also the largest chocolate producer, as many of the large chocolate manufacturers have chocolate confectionery production plants there.

European demand for cocoa beans is high – the largest in the world – because of its role in the chocolate value chain and driven by the increasing demand for more cocoa content in chocolates. However, the grinding of beans in Europe is expected to decrease in the coming years, with grinding in producing countries expected to rise.

Cocoa beans

The four largest exporters of cocoa beans to the EU are all West African countries, which supply 86% of all cocoa beans imported by Europe and were the main suppliers of bulk cocoa of the Forastero variety (74% of all imported cocoa beans) in 2020. The leading country from Latin America is Ecuador, with Colombia appearing at only number 20 on the list (Figure 19).

The main European importers of cocoa beans from outside the region are the Netherlands (importing more than half of the total volume), Belgium, Germany, France and the UK (Figure 20). The Netherlands acts as a major trade hub within Europe and imported over 1 million tonnes of cocoa beans in 2018 and 2019, and 0.97 million tonnes of cocoa beans in 2020. It is also responsible for 53% of re-exports into Europe, mostly to Germany, although Germany is importing more and more directly from producing countries. Together the top four importers account for about 90% of the total volume of cocoa beans imported by the EU.

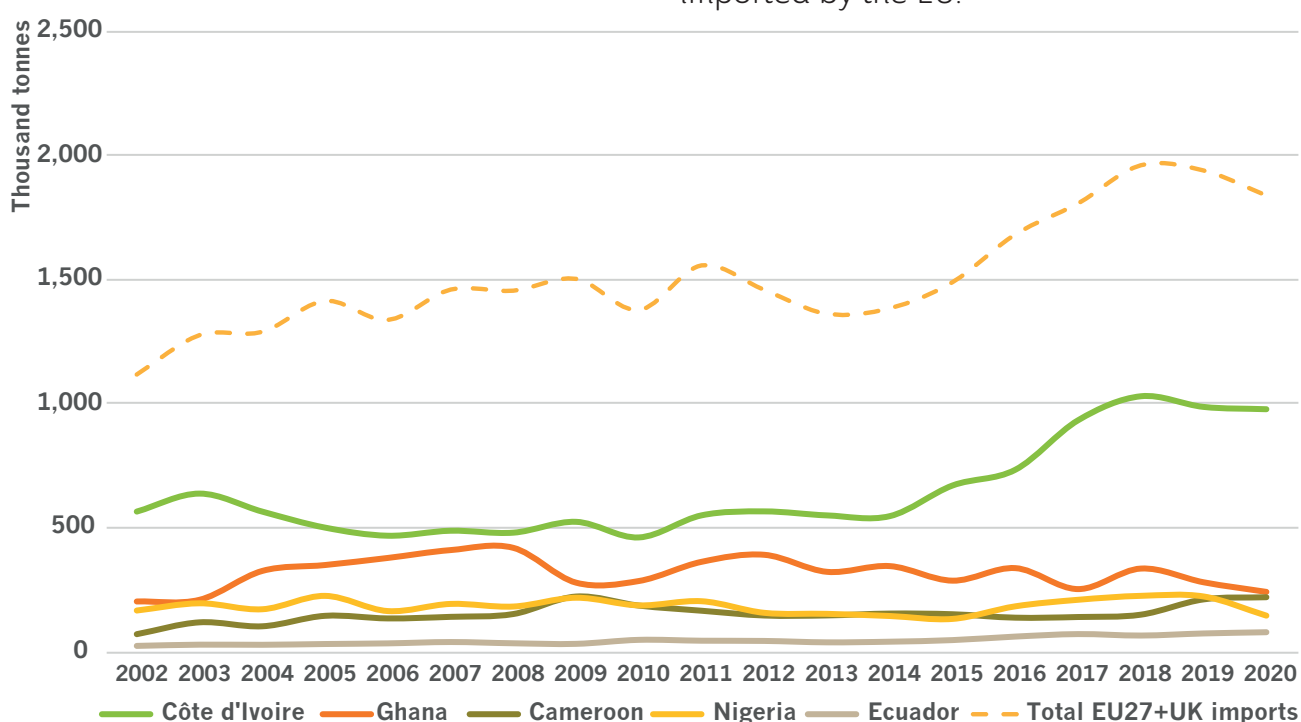


Figure 19. Import volumes of raw or roasted, whole or broken cocoa beans (HS 180100), showing the top five countries of origin and total EU27+UK imports between 2002 and 2019. Source: COLEAD, based on Eurostat.

²² CBI (2022). What is the demand for cocoa on the European market? European Union Centre for Promotion of Imports from Developing Countries. <https://www.cbi.eu/market-information/cocoa/trade-statistics>

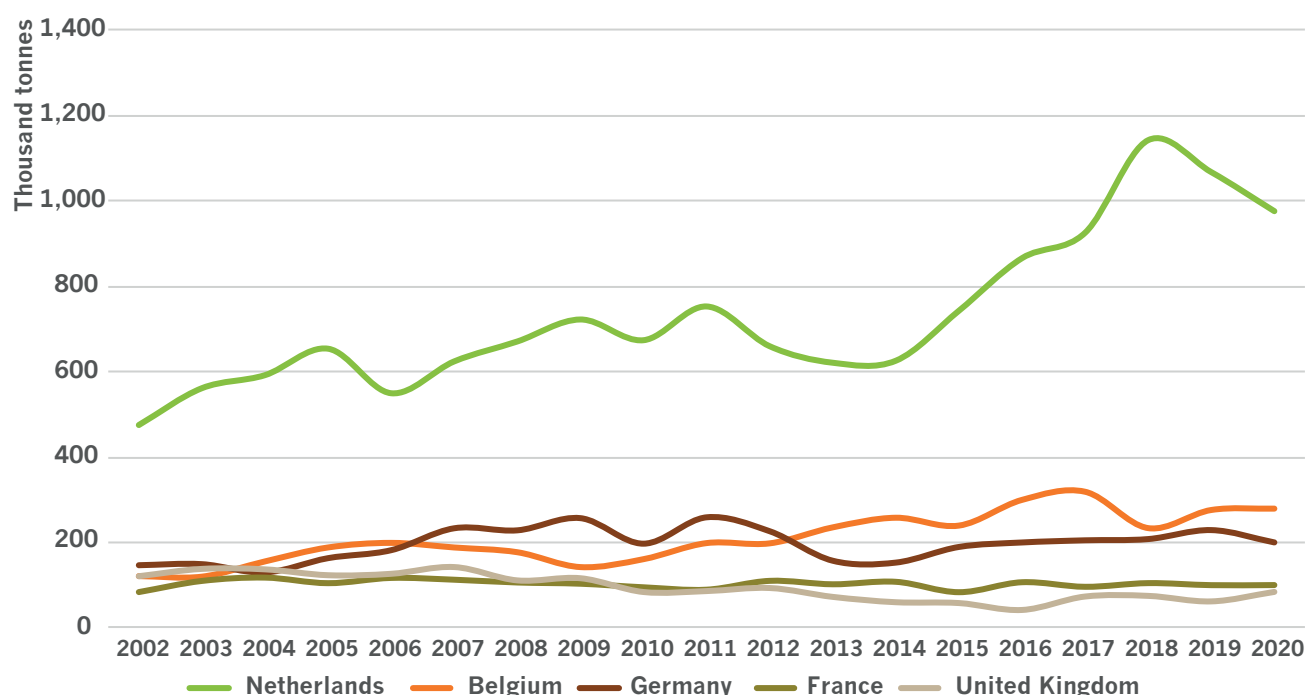


Figure 20. Import volumes of raw or roasted, whole or broken cocoa beans (HS 180100) of the top five EU27+UK importers between 2002 and 2020. Source: COLEAD, based on Eurostat.

After sub-Saharan Africa, Europe’s main suppliers of speciality cocoa beans is Latin America, representing 8.7% of total cocoa bean imports, with supplies originating in Ecuador (79,000 tonnes in 2020), the Dominican Republic (35,000 tonnes) and Peru (29,000 tonnes). Colombia’s exports to Europe were stable between 2002 and 2020 (CAGR of 0.8%), while exports from Ecuador have increased steadily and exports from the Dominican Republic and Peru experienced a reduction and stagnation since 2016 (Figure 21).

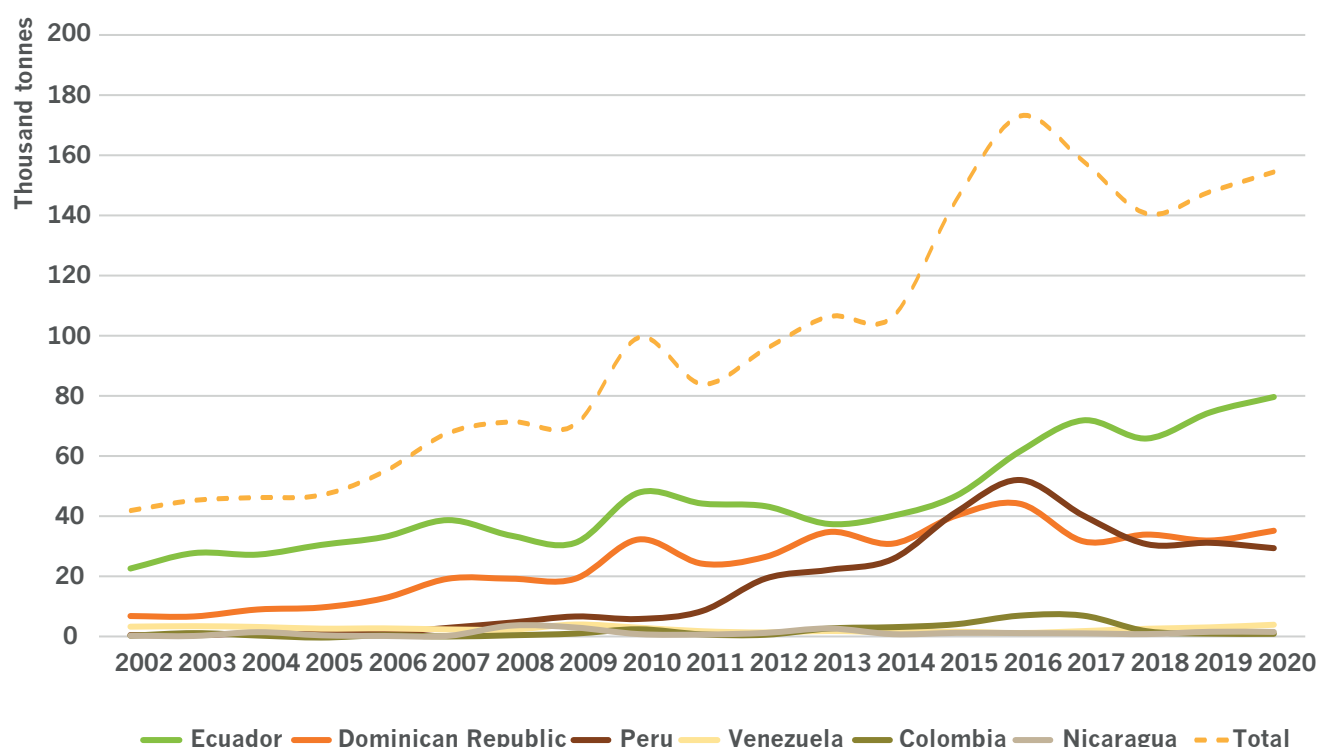


Figure 21. Total EU27+UK import volumes of raw or roasted, whole or broken cocoa beans (HS 180100) from the Latin America and Caribbean region between 2002 and 2020, showing the top five countries of origin. Source: COLEAD, based on Eurostat.

Semi-finished cocoa products

Total imports of semi-finished cocoa products by the EU from outside the region increased at a CAGR of 4% between 2002 and 2020. Côte d'Ivoire and Ghana are the main suppliers of semi-processed cocoa products, having together supplied 74% of the total volume imported by the EU in 2020 (Figure 22). Colombia ranked 15th in terms of the volume of semi-finished cocoa products imported by the EU, supplying less than 0.01% of the total import volume in 2020. When comparing Colombia with other suppliers from the Latin America and Caribbean region, exports from Colombia to the EU have increased slightly with a CAGR of 5% per year between 2002 and 2020, while exports from Brazil and Ecuador have been stagnant or decreased during the same period. Competitors such as Mexico and Peru have increased their shares of EU imports from Latin America (Figure 23).

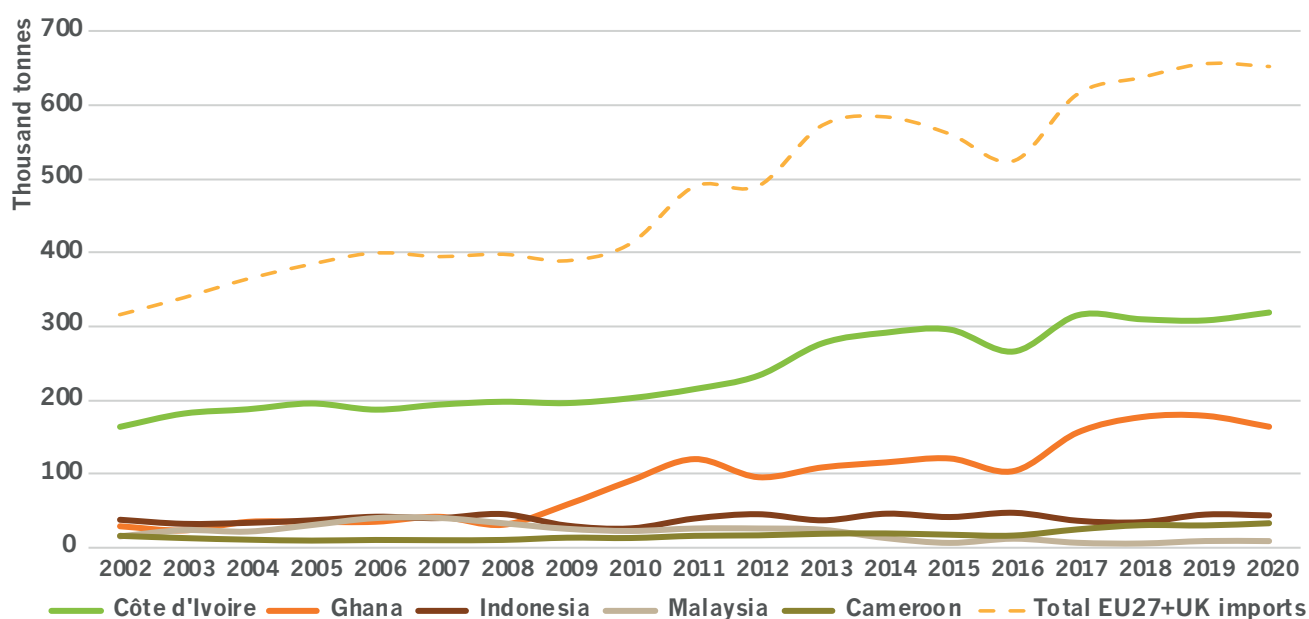


Figure 22. Total EU27+UK import volumes of semi-finished cocoa products (HS 180310, 180320, 180400, 180500 and 180610) between 2002 and 2020, showing the top five countries of origin. Source: COLEAD, based on Eurostat.

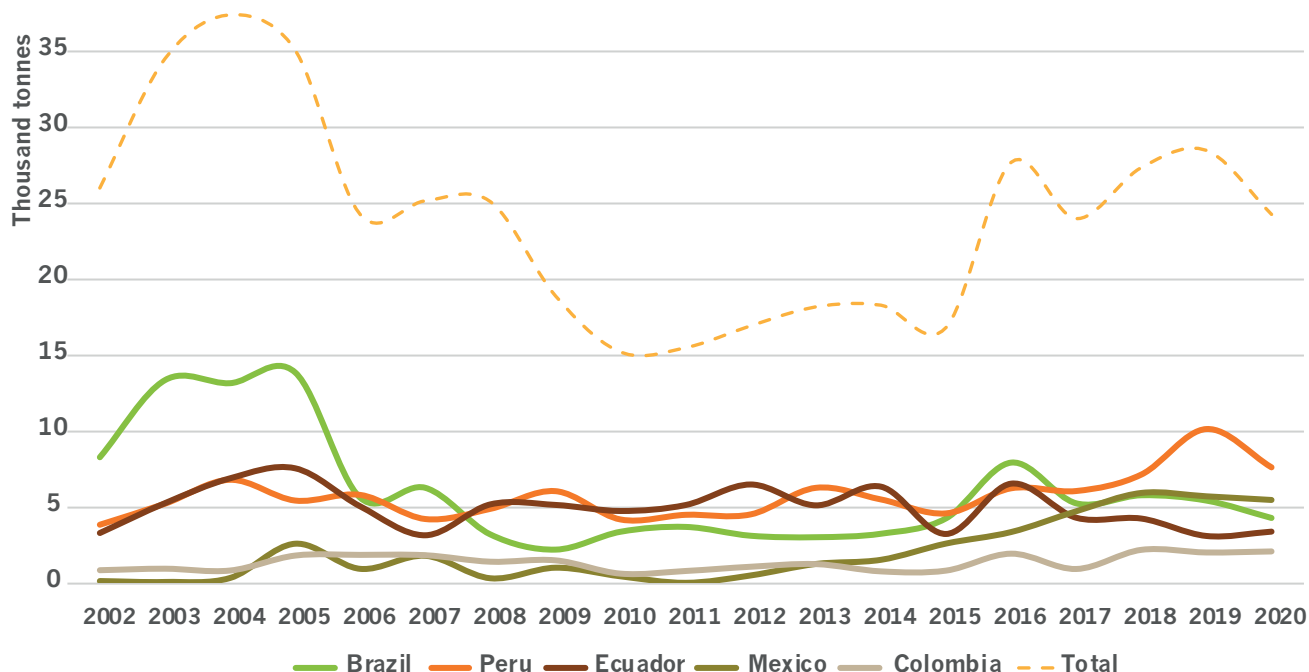


Figure 23. Total EU27+UK import volumes of semi-finished cocoa products (HS 180310, 180320, 180400, 180500 and 180610) from the Latin America and Caribbean region between 2002 and 2020, showing the top five countries of origin. Source: COLEAD, based on Eurostat.



Consumption trends

The main trends in imports of chocolate and cocoa beans to the EU are as follows.

- ✦ **Sustainability** in the cocoa value chain: consumers want to buy certified products to avoid deforestation and child labour, and to protect biodiversity and the environment. The demand for and sales of certified cocoa and chocolate products in Europe have increased in recent years.²³ There are private initiatives from multinationals and manufacturers themselves, as well as international initiatives to encourage this trend. (See section V.3 for more information on certification and labels.)
- ✦ Focus on the **origin of cocoa** and **traceability**: consumers have a growing interest in single origin, direct trade, shortening the cocoa chain and storytelling about where the beans come from. Single origins are now considered as mainstream products²⁴ High-end brands are now trying to differentiate themselves by focusing on even more
- specific origins and aiming to convince wealthier consumers to buy single estate origins. The El Rosario origin (in Necocli, Colombia) is an example of this new development.
- ✦ Interest in **speciality chocolates** is growing: there is greater global demand for fine flavour cocoa, and speciality and premium chocolate products, such as bean-to-bar makers (who control each step of the process from the imported raw bean through the roasting and manufacturing process to the chocolate product). There is also a search for diversity in flavour, differentiating high-quality and single-origin cocoa products from those of competitors. Mainstream chocolate companies in traditional European chocolate-consuming countries are investing in premium lines, while other retailers are developing high-end private-label products, making chocolate available at various prices for different types of consumers.
- ✦ **Health** and **wellness** influence consumption: due to increased demand for healthy eating (highlighted even more by COVID-19), there is a focus on organic products, no added sugar, high cocoa content, dark chocolate and even vegan or high-protein alternatives. As good quality cocoa means less sugar is needed, it is linked to the consumer demand for quality cocoa.

²³ CBI (2021) The European market potential for semi-finished cocoa products. European Union Centre for Promotion of Imports from Developing Countries. <https://www.cbi.eu/market-information/cocoa-cocoa-products/semi-finished-cocoa-products/market-potential>

²⁴ CBI (2022) Which trends offer opportunities or pose threats in the European cocoa market? European Union Centre for Promotion of Imports from Developing Countries. <https://www.cbi.eu/market-information/cocoa/trends>

3. Focus on organic cocoa in the EU27

It is important to note first that it is hard to observe trends in organic cocoa, as data on organic imports into the EU are available only for 2018, 2019 and 2020.

The vast majority (97%) of EU imports of organic cocoa products are cocoa beans (HS 1801: Cocoa beans, whole or broken, raw or roasted). In 2020, the EU imported 75,930 tonnes of cocoa beans (Figure 24).

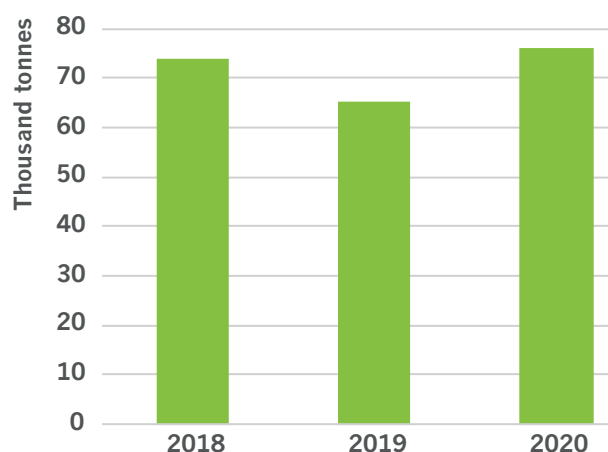


Figure 24. Volume of EU27 imports of organic cocoa beans (HS 1801) between 2018 and 2020. Source: COLEAD, based on TRACES (2022).

The Dominican Republic is the largest exporter of organic cocoa, with 24,940 tonnes exported in 2020 (37% of the total). Sierra Leone grew in importance from being the fourth largest exporter in 2018 to the second in 2020, with 24% of the volume (18,100 tonnes), followed by Peru (9,570 tonnes or 13% in 2020) and Congo (8,580 tonnes or 11%). The biggest importer is the Netherlands (52,390 tonnes in 2020), accounting for 69% of EU imports of organic cocoa beans. Italy had a larger share in 2018 (19%) than in 2020 (11%), while the shares of France and the Netherlands increased. Colombia was ranked as the 20th largest exporter of organic cocoa beans to the EU in 2020, with 37 tonnes recorded, exported almost entirely to the Netherlands. The remaining EU imports of products containing organic cocoa include processed organic cocoa and chocolate. The processed cocoa categories comprise mainly cocoa butter (1,294 tonnes in 2020), cocoa paste

(562 tonnes in 2020) and unsweetened cocoa powder (109 tonnes in 2020) (Figure 25). There is very little sweetened cocoa powder, with around 4 tonnes imported in 2020. Imports of cocoa paste increased by 189% between 2018 and 2020. At the same time, the share of cocoa butter in total imports decreased from 77% to 66%, although the volume increased slightly.

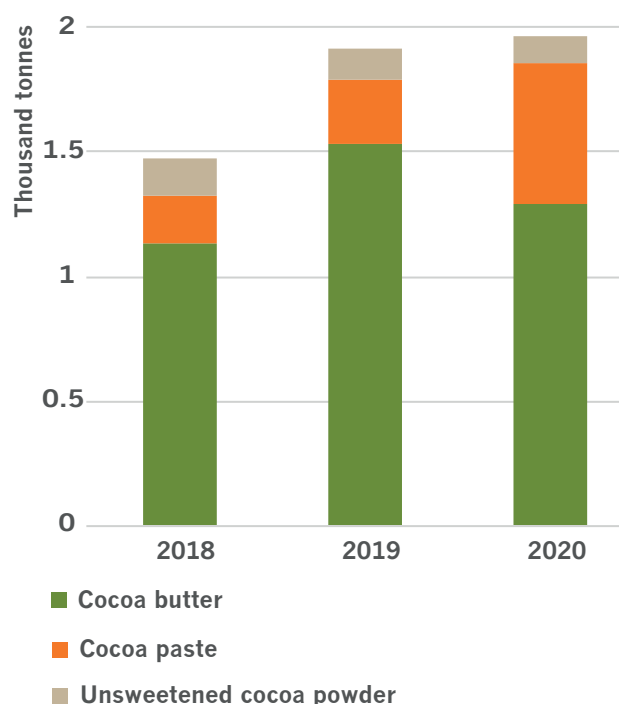


Figure 25. Volume of EU27 imports of organic processed cocoa (cocoa butter, cocoa paste and unsweetened cocoa powder) between 2018 and 2020. Source: COLEAD, based on TRACES (2022).

The main exporters of organic cocoa butter are Peru, representing half of EU imports, then the USA (with 31%, 396 tonnes, but no recorded exports in 2018 and 2019) and the Dominican Republic (around 120 tonnes and 9% of the total in 2020). The Netherlands (39%), France (32%) and Germany (26%) accounted for almost all imports in 2020, whereas Germany and the Netherlands shared 93% of imports in 2018.

The market for organic cocoa paste seems to be still developing. Vietnam appeared on the list of exporters in 2019 and represented half of EU imports in 2020. Similarly for importers, Belgium imported more than 270 tonnes

(50% of imports) in 2020, a large increase compared to the less than 1 tonne imported in 2018.

The organic unsweetened cocoa powder imported by the EU comes mostly from Peru (71 tonnes or 67% of the total in 2020) and Ecuador (17 tonnes or 16% in 2020). The main importers are Germany (45 tonnes or 43% in 2020) and the Netherlands (28 tonnes or 27%).

Imports of organic chocolate to Europe from the rest of the world account for smaller quantities than most of the previously mentioned organic cocoa-related products. It is still an important market, however, as the value is higher than that of raw organic cocoa beans. As shown in Figure 26, the most important imported chocolate product is HS 18063210: Chocolate and other preparations containing cocoa, in blocks, slabs or bars of ≤ 2 kg, with added cereal, fruit or nuts (excl. filled), with 28 tonnes in 2020, coming mainly from Canada (44%) and the USA (21%). This probably means that these countries import cocoa beans and re-export finished organic

chocolate products.

The other main imported organic chocolate product is HS 18063290: Chocolate and other preparations containing cocoa, in blocks, slabs or bars of ≤ 2 kg (excl. filled and with added cereal, fruit or nuts), which is similar to HS 18063210 mentioned above but includes chocolate with no filling. The origins of these two types of chocolates are very different. Here, the organic chocolate comes mainly from Ecuador (15 tonnes or 49% of the total in 2020) and Ghana (10 tonnes or 34%). The leading destination countries are the same for both products, i.e. the Netherlands, Germany and France.

Colombia's exports of organic cocoa-related products are very limited. In 2018, 53 tonnes of cocoa beans were exported to Europe from Colombia, and only 37 tonnes in 2020. Other cocoa-related products are almost non-existent, accounting for less than 1 tonne for all the years considered. At the moment only one brand (Equiori) is producing and exporting organic certified chocolate from Colombia to Switzerland. This represents supplies for the Helvetic brand Pakka.²⁵

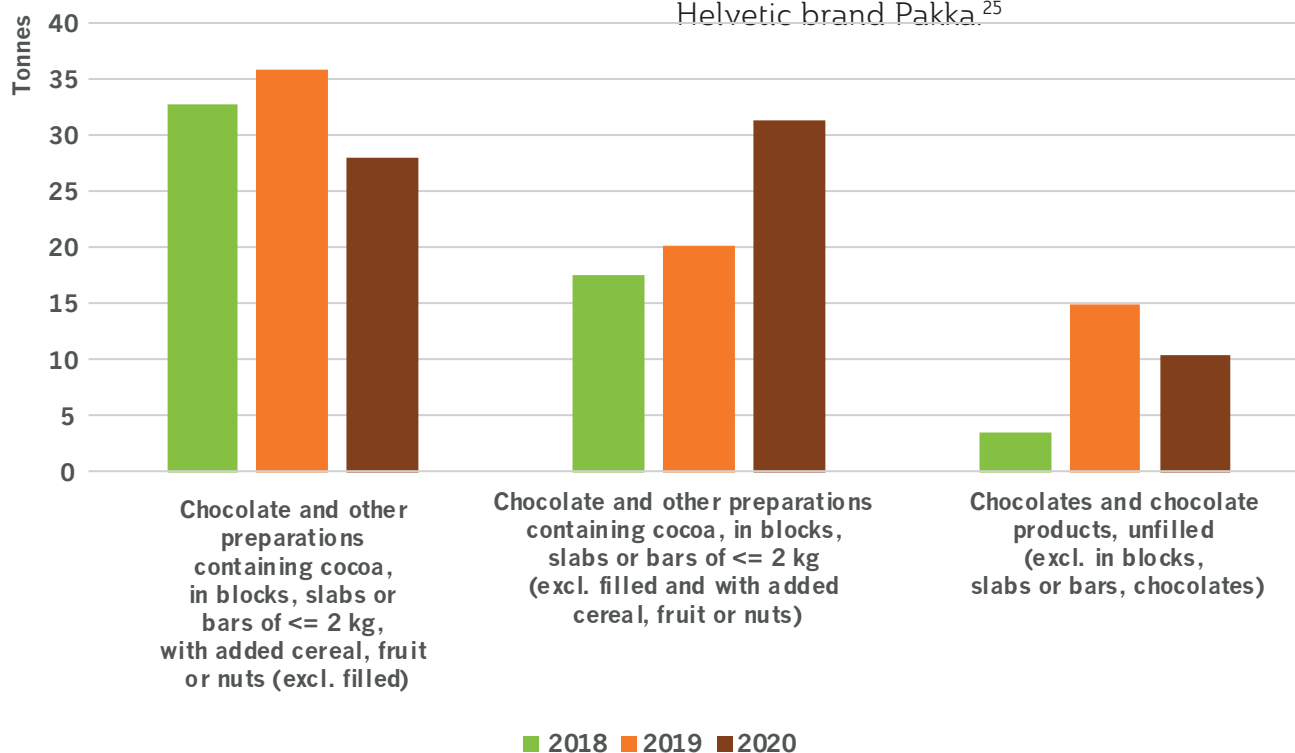


Figure 26 : Volume of imports of organic chocolate to EU27 from the rest of the world between 2018 and 2020 (tonnes). Source: COLEAD, based on TRACES (2022).

²⁵ Pakka (undated). Southern Partners: Equiori, Colombia. Pakka, Switzerland. <https://www.pakka.ch/en/suedpartner/equiori-colombia/>

V. MARKETS

1. Market prices

Cocoa beans

Conventional cocoa beans, or commodity cocoa (e.g. CCN51), are traded mainly as a commodity and the price is defined by the price of futures on the New York Stock Exchange (NYSE) regardless of the origin. Future prices have fluctuated at around US\$2,500 per tonne from 2020 to 2022, reaching almost US\$2,900 in February 2020 and dropping to US\$2,160 in December 2020. In 2021 and 2022, fluctuations were less severe. According to Fedecacao, national prices are around 10% below the international price. The average price paid in 2021 reached COL\$8,179 (Colombian dollar), equivalent to just over US\$2 per kg, while the international price reached COL\$9,087 per kg (US\$2.33). Colombia has established a cocoa price stabilisation fund, which sets a lower price and an upper price. Every producer, seller and exporter of cocoa pays a contribution to the fund when the international market price is greater than the upper value. This allows them to claim compensation from the fund when the international price falls below the lower value. The fund is administered by Fepcacao²⁶, a department of Fedecacao.

Producers, sellers and exporters also contribute Fondo de Fomento Cacaotero, which is a tax of 3% of the export value. This is used for research (7%), technology transfer and assessment (66%), commercialisation (7%) and other uses. In 2019 the fund collected over COL\$12 million (over US\$3 million) for this purpose.²⁷

Depending on the variety, quality and certification, certain cocoa beans can be sold as premium cocoa. Premium cocoa can attract higher prices than commodity cocoa and prices are less dependent on the price of futures on the NYSE. Prices per tonne can be negotiated directly by the buyer. Legast Chocolatier from Belgium sources around 2 tonnes per year of

cocoa beans from Colombia. This company adopts a meticulous process of selection and pays US\$4,000 per tonne at the farm gate. Legast usually requires the producer to send a sample before the shipment, but the farmer receives two to three times the price that would usually be received when selling the cocoa locally.²⁸ Premium cocoa beans are destined mainly for bean-to-bar producers and premium chocolate producers.

The volume of cocoa beans exported from Colombia to the EU increased by nearly ten times (994%) between 2002 and 2017, from 600 to 7,100 tonnes in 2017 worth €16.5 million, but exports dropped steeply after that to 1,200 tonnes in 2020 worth €3.6 million. Exports of cocoa beans to the EU represented a share of about 2% of national production in 2002, and this share gradually decreased to only about 1% in 2020.

Semi-finished products

After cocoa beans, cocoa butter is the most important cocoa-based export product in terms of value. The prices of cocoa products registered a steady increase over the last two decades without taking inflation into account. In 2020 the price of Colombian cocoa butter averaged around US\$5.34 per kg (free on board [FOB]) while it was US\$2.41 in 2002. However, there is a big difference in price depending on the cocoa butter quality, with premium cocoa butter from Equiori (organic) selling at COL\$40,000 (US\$10.24) and up to US\$24 per kg in the domestic market (El Molino Verde - B2C price).

The quantity of cocoa butter exported to the EU increased from 840 tonnes in 2002 to about 2,000 tonnes in 2020. Export quantities varied from less than 500 tonnes per year in 2010 to over 2,000 tonnes in 2018. Cocoa butter exports to the EU were worth €9 million in 2020 and accounted for 42% of the volume of Colombian cocoa butter exports.

²⁶ La Secretaría Técnica del Fondo de Estabilización de Precios del Cacao. <https://www.fepcacao.com.co/en>

²⁷ Interview with Ministerio de Agricultura, Cadena de Cacao (2021).

²⁸ Interview with Patricia Forero, Legast Chocolatier (2022).

Cocoa paste (not including chocolate or food with chocolate), follows in terms of the quantity and value of Colombian cocoa-based exports. Export volumes have grown almost continuously from 271 tonnes in 2002 to 1,440 tonnes in 2020 worth US\$5.2 million FOB. In terms of value, a decline is observed starting in 2016. Also, the average cocoa paste (defatted or not) price increased from US\$1.9 per kg in 2002 to US\$4.5 per kg in 2016, and slightly reduced after that to US\$3.6 per kg (FOB) in 2020. Again, premium cocoa paste is sold for very different prices, between US\$6 and US\$8.50 per kg (FOB).

The quantity of cocoa paste exported to the EU increased from 19 tonnes in 2002 to about 70 tonnes in 2020. Export quantities to the EU varied, e.g. from over 250 tonnes in 2005 to less than 20 tonnes in 2008. Cocoa paste exports to the EU were worth €325,000 in 2020 but accounted for only 5% of the total volume of Colombian cocoa paste exports.

Cocoa powder is the fourth most important cocoa-based product exported from Colombia. Sweetened cocoa powder has a slightly lower value than non-sweetened cocoa powder (e.g. fetching US\$2.7 per kg in 2020 compared with US\$2.8 per kg FOB for non-sweetened). It used to be exported in larger quantities, however this situation reversed around 2014 due to a strong decline in sweetened cocoa powder exports (from 5,800 to 100 tonnes) and a steady increase in non-sweetened cocoa powder exports (from 100 to 1,200 tonnes). Price trends for both types of cocoa powder are very similar. Prices went up from about US\$1 and 1.90 per kg in 2002 to reach a maximum of about US\$4 per kg around 2012, after which there was a slight decline again. Especially in the years between 2002 and 2008 there was a larger difference in price, with non-sweetened cocoa powder fetching about double the price of sweetened (which was at that time, however exported in much larger quantities). The price for premium organic cocoa powder (Equiori for example) is COL\$34,300 (US\$8.78) per kg, although Cacao Hunters powder can reach COL\$47,000 (US\$12) per kg on the domestic market.



Colombian exports of cocoa powder to the EU follow the same trends as for global exports, with a change in emphasis from sweetened to non-sweetened cocoa powder. Non-sweetened cocoa powder exports increased particularly from 2014 onwards. Total cocoa powder exports to the EU increased from 2.6 tonnes in 2002 to 17.1 tonnes in 2020 (worth €93,500). The cocoa powder exports to the EU represent only 1% of Colombia's cocoa powder exports. This is probably due to two main reasons. First, there is a big industry producing cocoa powder in the Netherlands, which makes for stiff competition. Second, the permissible level of cadmium in cocoa powder is set very low in the EU. Since cocoa powder can contain up to twice the quantity of cadmium as in a cocoa bean, many producers are unwilling to send cocoa powder to the EU to avoid potential interceptions.

Chocolate products

Finished chocolate is the most important cocoa-based export product for Colombia. The trade is categorised as chocolate and food with cocoa in blocks, slabs or bars of above 2 kg and below 2 kg, filled and not filled. Exports are highest for blocks of over 2 kg and non-filled chocolate of less than 2 kg. Colombian exports of all chocolate increased from 5,800 tonnes in 2002 to 13,000 tonnes in 2020. The price of these products fluctuated at between US\$2 and 3 per kg between 2002 and 2012. After this, prices increased up to US\$7 per kg in 2014, decreasing again to US\$3.6 per kg in 2020. This is mainly because the higher volumes exported consisted of more low-quality chocolate (with low cocoa content).

Regarding exports to the EU, average prices for Colombian chocolate have remained relatively stable at around €4 per kg (FOB). Colombian chocolate export volumes, however increased significantly, a trend driven mainly by the UK and German markets. Export volumes increased from 34 tonnes in 2002 to 889 tonnes in 2020 worth €3.6 million.

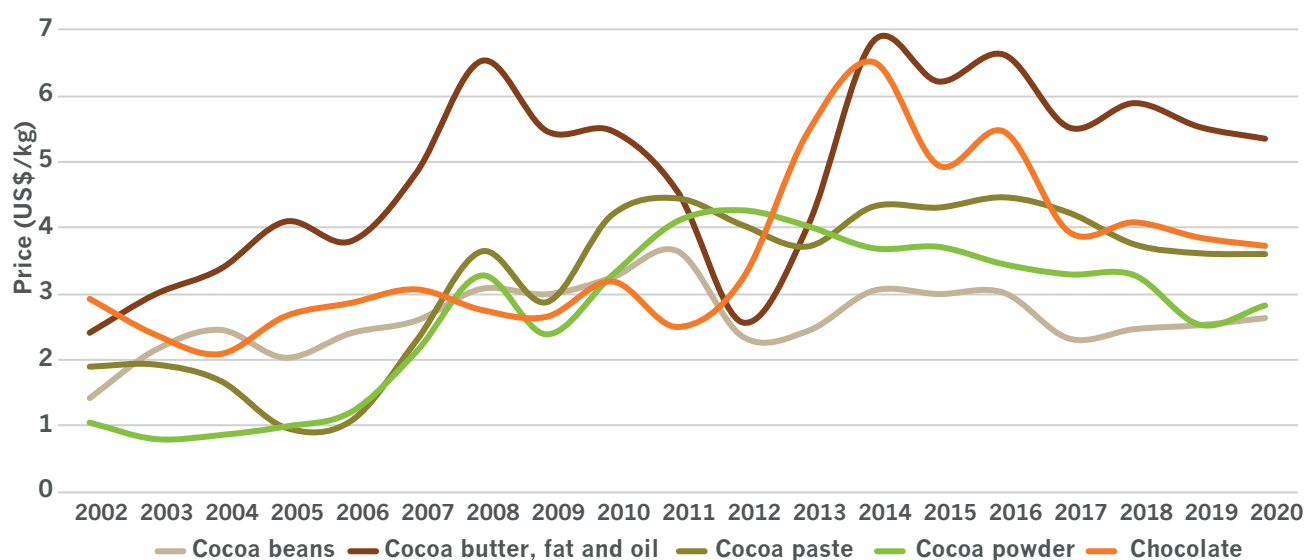
However, it should be noted that the price of finished chocolate products varies considerably, depending on the product and its certification. For example, premium brands have adopted small sized packaging of 60–90 g bars. These are smaller than the European market standard size of over 100 g. Consumer

prices in Colombia can be expensive for “fino de aroma” chocolate. Evok, for example, sells locally at COL\$21,000 per 90 g bar (US\$5.36) equating to around US\$60 per kg. Equiori sells an 80 g organic 100% chocolate bar at COL\$14,000 (US\$3.60 or US\$45 per kg), with a 70% chocolate bar selling for COL\$11,900 (US\$3.05 or US\$38 per kg).

Recently, a niche market is developing in heirloom cocoa. It guarantees to trace the history of the trees and produces minimal quantities. Most is sold under premium Colombian brands, such as Cocoa Hunters, which sells a line of heirloom chocolate for COL\$15,000 (US\$3.84) for 28 g (US\$137 per kg).

Premium chocolate drops is another form of chocolate export products with a price range of between US\$9 and 19 per kg. Some examples of brands and prices, sold usually with quality certificates, include Luker (COL\$37,500 per kg or US\$9.60), Cacao Hunters (COL\$74,500 per kg or US\$19) and Equiori organic chocolate drops (COL\$36,000–39,000 or US\$9.21–10). Colombia also has a market for a range of drops made with chocolate substitute, which is a mix of vegetable fat, sugar, cocoa powder and artificial aroma, with prices generally under COL\$20,000 per kg (US\$5). Most brands like Luker and Nacional de Chocolates offer both kind of products.

Figure 27 illustrates the prices (FOB) of the main Colombian cocoa-related commodities



exported between 2002 and 2020.

Figure 27 : Export prices (FOB) of the main Colombian cocoa-related commodities between 2002 and 2020.
Source: COLEAD, based on CEPII BACI.

Bean to bar

In recent years, bean-to-bar chocolate – made by chocolatiers from the bean through the whole process to finished chocolate – has seen growing demand. It is considered as a high-quality product and has prompted increased demand for cocoa beans imported into Europe, rather than chocolate being produced mainly in the country of origin with the final product being exported to Europe.

The growth in European bean-to-bar producers has made it more difficult for niche chocolate makers from Latin America to compete, mainly because EU buyers prefer locally produced chocolate, and it is easier to transport beans than finished chocolate. Currently, many EU producers' prices are more competitive for single-origin chocolate tablets than those produced in South America, with retail prices of chocolate bars ranging from €4.50 to 8 for 50–100 g tablets.

Legast Chocolatier is a Belgian chocolate maker that produces bean-to-bar tablets and pralines. It sources chocolate mainly from South America, with the interviewee having worked with Colombian producers from Santa Marta, Santander, Sierra Nevada and Tumaco regions. Legast imports around 2 tonnes per year of speciality cocoa beans from Latin America.²⁹ Other EU producers are selling 120 g chocolate bars using organic certified cocoa at €1.50–2.50 using single-origin cocoa from large-scale chocolate producers, such as Barry Callebaut. These are sold under many different private labels.

2. Market access – legal requirements

The EU Centre for the Promotion of Imports from Developing Countries (CBI)³⁰ sets regulatory measures and legal requirements. There are no

specific food safety regulations for cocoa and cocoa products, therefore, the General Food Law and the general rules on food hygiene should be referred to for regulations.³¹ As far as contaminants are concerned, cocoa is not very susceptible to microbiological infection. However, it is important to control the levels of other contaminants, such as pesticides (and to respect the maximum residue levels) and heavy metals such as cadmium (see EC No. 1881/2006).³²

In Europe, there is an integrated approach to food safety through farm-to-fork measures and adequate monitoring. The framework for this was established in European Commission Regulation 178/2002 and its amendments. The Regulation includes the establishment of the European Food Safety Authority (EFSA), which provides scientific advice and scientific and technical support in all areas impacting food safety.

The food safety concerns for the cocoa industry focus on food contaminants, mainly cadmium and heavy metals but also allergens, dioxins and polychlorinated biphenyls, bacteria, foreign matter, infestations, mineral oil hydrocarbons, polycyclic aromatic hydrocarbons, mycotoxins including ochratoxin A, and pesticide residue. Cadmium³³ is the main issue for heavy metals and the EU strengthened its regulation on cadmium in 2019.³⁴

Many regions of Colombia have been affected with high levels of cadmium (e.g. Arauca, Cordova and Santander). Regarding this issue, the Colombian government has set up a taskforce (*Mesa Nacional de*

31 European Commission (2002) General Food Law. https://food.ec.europa.eu/horizontal-topics/general-food-law_en

32 Commission Regulation (EC) No 1881/2006 of 19 December 2006. <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:02006R1881-20150521>

33 Cadmium is a toxic heavy metal, present in the soil of some cocoa plantations. It can accumulate in human tissue over time and can cause kidney and bone damage as well as being a carcinogen. Cadmium can be found naturally in soil because of volcanic activity, forest fires and weathering of rocks. The EU recently set maximum limits for cadmium in cocoa products, and it must be noted that the final product is evaluated, not the bean. More information in Appendix I.

34 CBI (2021). What requirements must cocoa beans comply with to be allowed on the European market? <https://www.cbi.eu/market-information/cocoa/buyer-requirements>

29 Interview with Patricia Forero, Legast Chocolatier (2022).

30 CBI (2021) What requirements must cocoa beans comply with to be allowed on the European market? European Union Centre for the Promotion of Imports from Developing Countries. <https://www.cbi.eu/market-information/cocoa/buyer-requirements>

Inocuidad en Cacao-Cadmio). This taskforce agrees and implements a series of actions that allow the country to minimise risks and face challenges and opportunities related to the regulations that establish the maximum concentration levels of chemicals and heavy metals, particularly cadmium, in cocoa and its derivatives. There are four main axes:³⁵

- ✦ Research and development: aims to strength the capacity of local laboratories to evaluate cadmium content.
- ✦ Traceability and food safety: develops and implements good practices aiming to reduce the presence of cadmium in plantations.
- ✦ Commercial strategy: looks for new markets and strengthens the position of Colombian cocoa.
- ✦ Transversal axis: consolidates information in the cocoa supply chain for private and public entities.

One of the consequences of cadmium regulations is countries producing “fino de aroma” cocoa have had to lower the price of high-quality beans with a high cadmium content. Large-scale industries benefit because they buy this cocoa and mix it with lower quality cocoa (low in cadmium) to improve its flavour. (See more information in Appendix I.)

The EU also has strict food labelling rules, which allow consumers to receive essential information and make informed purchasing choices. Exporters should refer to the general labelling and packaging guidelines, with specific rules for labelling of cocoa and chocolate products under EU Directive 2000/36/EC.³⁶ The minimum information to be provided on the packaging is the name of the product, the quality, the batch code, the country of origin, the net weight in kg and, in the case of certification, the name or code of the inspection body and the certification

number.

It is also important to stay informed about packaging trends, even when exporting raw materials for processing. For example, for cocoa of standard quality, importers generally prefer containers with large quantities of cocoa beans, whereas smaller packaging is preferable for high-quality products (jute bags, or even vacuum packaging for products of rare quality). Other additional requirements that buyers might request are quality criteria (International Organization for Standardization [ISO] Standards for cocoa beans ISO 2451:2017 and other quality assessments), food safety certification (such as GLOBALG.A.P³⁷), corporate social responsibility, sustainability certification, etc. Niche markets might also require organic or Fairtrade certification.

Export requirements

All cocoa beans exported from Colombia need to have the following certification documents:

- ✦ Exports must be made and billed by a Colombian company with a value-added tax (VAT) number (*Registro Unico Tributario* or RUT), which is duly authorised as an exporter at the National Tax and Customs Direction (*Direccion de Impuestos y Aduanas Nacionales* or DIAN).
- ✦ In the case of cocoa beans, the payment of the Cocoa Promotion Fee must be made before exporting. The Ministry of Agriculture will indicate every six months (before June 30 and December 31 each year) the value per kg of the respective product at the national or regional level.
- ✦ Verify the export approvals for your product. The Colombian Agricultural Institute (*Instituto Colombiano Agropecuario* or ICA) will issue the phytosanitary certificate as appropriate. A health inspection certificate is also required from the National Institute for Drug and Food Surveillance (*Instituto Nacional de Vigilancia de Medicamentos y Alimentos* or INVIMA).
- ✦ If sanitary requirements are already agreed between Colombia and the export

³⁵ Ministerio de Agricultura, Cadena de Cacao (2021).

³⁶ Directive 2000/36/EC of the European Parliament and of the Council of 23 June 2000 relating to cocoa and chocolate products intended for human consumption. <https://eur-lex.europa.eu/legal-content/EN/ALL/?uri=CELEX%3A32000L0036>

³⁷ GLOBALG.A.P. https://www.globalgap.org/uk_en/

destination country, the interested party must obtain a sanitary certificate for export directly from INVIMA, and follow the procedures established by this institution. The sanitary certificate for export will be issued directly by the INVIMA office at the port of departure and will have the signatures of the ICA and INVIMA sanitary inspectors from the place of shipment.

A digital platform is available to help exporters complete most export procedures³⁸, and it is necessary to have a token with a digital signature to access this system. In this virtual window, using the Single Foreign Trade Form (*Formulario único de comercio Exterior* or FUCE), exporters can carry out some procedures associated with a tariff subheading (a subheading appearing in the Standard Tariff), such as registration of national producers, electronic processing of prior export authorisation, access to government entities linked to the management of approvals, systems of simultaneous inspection, police registration, anti-narcotics, etc.³⁹

3. Certification and labels

Certification is increasing in the cocoa market because of stricter sustainability protocols set by manufacturers and retailers in Europe. The World Cocoa Foundation estimates that 22% of cocoa is certified,⁴⁰ even if it is not all sold as such. It is important for producers and exporters to meet the requirements of their target market, and it is becoming increasingly necessary to achieve certification. For example, it is becoming difficult for non-certified exporters to enter the European market.

Rainforest Alliance/UTZ⁴¹

38 Ventanilla única de comercio exterior www.vuce.gov.co

39 Government of Colombia/Procolombia (2022) Guía Práctica para conocer el proceso de exportación de bienes. https://procolombia.co/sites/default/files/guia_proceso_exportaciones_0.pdf

40 World Cocoa Foundation (2018). Beyond Certification: How Can Sustainability be Achieved in the Cocoa Sector? <https://www.worldcocoafoundation.org/press-release/beyond-certification-how-can-sustainability-be-achieved-in-the-cocoa-sector/>

41 UTZ certification is now part of the Rainforest Alliance, which was launched in 2020. The UTZ certification programme and its label are being phased out and producers and actors certified by UTZ are making the

This is the main certification body for cocoa and promotes sustainability and biodiversity preservation. The Rainforest Alliance was created to fight deforestation in cocoa production, and some indicators are designed for this purpose. It is the main certification required for bulk cocoa imports into Europe to adhere to the increasingly strict sustainability protocols of manufacturers and retailers. Bulk cocoa exporters without this certification will have difficulty accessing the European market. Europe is the largest market for cocoa within this certification (80% of certified actors are located in Europe, mostly chocolate manufacturers). The main suppliers of Rainforest Alliance and Fairtrade certified bulk cocoa beans are Côte d'Ivoire and Ghana, accounting for 81% of the world's supply. Both producers and supply chain actors can be certified. As of July 2022, there are two cocoa producers from Colombia that have the Rainforest Alliance/UTZ label.⁴²

Organic and Fairtrade

There is increasing demand for organic and Fairtrade cocoa in the speciality market, with such certification associated with high quality (see section on organic cocoa above). Colombia currently has a limited number of organic certified farmers, so the offer of organic products is very limited.

Changes in EU organic regulations will impact cocoa producers, most likely through changes in group certifications, which will affect smallholder producers operating in farmer groups and cooperatives. Additional changes concerning sampling will increase the costs of production. The Organic World Congress (2021)⁴³ estimated the additional costs for a small-scale producer organisation with 1,500 members would be about US\$1,000–2,000, or around 38% increase from the previous cost of organic certification.

The Fairtrade standards were updated in 2019,⁴⁴ allowing a higher premium price on

transition to the Rainforest Alliance programme.

42 The list of Rainforest Alliance/UTZ certificate holders can be found at https://utz.org/?attachment_id=12594

43 Organic World Congress (2021) <https://owc.ifoam.bio/2021/en>

44 Fairtrade (2019) Fairtrade Standard for Small-scale



the market to encourage producers to achieve certification.

Traceability

Certificate of origin EUR.1 is a document that certifies that the product has been produced in the country of origin, in this case Colombia. The certificate is required if exporters wish to take advantage of the economic partnership agreement between the EU and Colombia. Exporters of cocoa beans, derivatives and chocolate will have to pay VAT according to the level set by each EU country (e.g. 6% in Belgium). This Certificate of Circulation of Merchandise EUR.1 is issued by DIAN as the competent authority, and applies solely and exclusively to shipments where the value is greater than US\$6,000, otherwise a declaration of the origin (in English) in the invoice will be sufficient.⁴⁵

If the cocoa beans are organic, it is also necessary to obtain a Certificate of Inspection

(COI) document for each import, which is registered in the EU Trade Control and Expert System (TRACES). This document must be issued before the cargo is shipped. This requires the importer to validate the organic certificate of the producer (exporter); without this validation, it is not possible to sell or promote the products as organic in Europe, even if they are certified in the country of origin. To complete this process, both the exporter and the importer must be certified as organic by accredited organisations. The certificate is filled out first by the producer, who will complete the document with a detailed list of the products and subproducts, such as cocoa beans, chocolate, cocoa butter, etc.; the packaging in g or kg; and the total weight of the export. Once the document is in the system, the importer will have to provide information about the shipment details, such as an invoice, packing list, airway bill for airfreight, bill of landing for sea freight, certificate of origin and any other documentation. Once the cargo arrives in the EU, it needs to be validated by the organic authority at the port of entry. Finally, the document has to be signed and validated by the first consignee of the shipment. From 2022, It is imperative that the COI is issued

Producer Organizations V2.0. <https://files.fairtrade.net/standards/SPO-Requirements-Overview-2019.pdf>

⁴⁵ DIAN (2022) Procedimiento Para La Emisión Del Certificado De Circulación De Mercancías Eur.1 - Estados Miembros De La Unión Europea. La Dirección de Impuestos y Aduanas Nacionales. <https://www.dian.gov.co/Paginas/Certificado-de-Circulacion-de-Mercancias-EURL.aspx>

before the shipment has left the country to avoid further complications that could include the destruction of the shipment.

Main social and environmental issues related to cocoa

Deforestation in Colombia has increased since 2014 and is accelerated by criminal activities.⁴⁶ In addition to being a key environmental issue, it is therefore a pressing matter for this country. Deforestation is addressed in Colombia by the Cocoa, Forests and Peace Initiative scheme, particularly in such regions as Arauca, Guaviare, Nariño and Putumayo.⁴⁷ However, this scheme is not yet recognised by international markets.

The main label addressing deforestation is the Rainforest Alliance/UTZ. In the Fairtrade label some criteria also concern biodiversity protection and prohibit producers from cutting down protected forests to plant crops. The CDP (Disclosure, Insight, Action) programme is a not-for-profit charity that runs the global disclosure system for investors, companies, cities, states and regions to manage their environmental impacts.⁴⁸

Child labour and slavery are recurrent issues in cocoa production (and agriculture as a whole), and several big corporations in the chocolate industry have faced lawsuits for child labour. Although there is no specific child-labour-free certification for cocoa products, the Fairtrade label addresses this issue in its certification criteria.⁴⁹ The Rainforest Alliance/UTZ system also has rules on child labour, but there are reports of child abuse in certified farms, as discovered during independent audits.⁵⁰

Certification schemes are complemented by several additional initiatives, such as Cocoa Horizons, a programme focusing on cocoa farmer prosperity and helping build self-sustaining farming communities that protect nature and children.⁵¹ There are also national initiatives in each country, bringing together actors in the cocoa market (importers, manufacturers, chocolate makers, etc.) to ensure a sustainable value chain. For example, the German Initiative on Sustainable Cocoa⁵² and the Belgian Sustainable Trade Initiative's Beyond Chocolate partnership⁵³ are aiming to end deforestation, stimulate education for future generations and provide a living income for cocoa growers.

Colombia has been successful in developing strong marketing messages, as with the "Juan Valdez" strategy used to promote its coffee as "Café de Colombia". It has also launched the "Maria del Campo" branding to promote cocoa and chocolate from Colombia. While this campaign has yet to be as widely recognised as Juan Valdez, it is starting to promote a stronger image for Colombian cocoa (Figure 28).⁵⁴

Manifesto Cacao is a private initiative aiming to promote Colombian cocoa and create wider recognition in the international market. The campaign aims to create an image for cocoa as a speciality and rare product, rather than



Figure 28. Maria del Campo is the image chosen by Fedecacao to promote cocoa producers and represent them in international trade shows. Source: Fedecacao.

46 International Crisis Group (2021) A Broken Canopy: Deforestation and Conflict in Colombia. <https://www.crisisgroup.org/latin-america-caribbean/andes/colombia/091-broken-canopy-deforestation-and-conflict-colombia>

47 LukerChocolate (2020) Cocoa Crops: An Alternative to Deforestation In Colombia. <https://www.lukerchocolate.com/en/beyond-sustainability/cocoa-crops-an-alternative-to-deforestation-in-colombia/>

48 CDP website. <https://www.cdp.net/en/forests>

49 Fairtrade International (undated) Child labour. <https://www.fairtrade.net/issue/child-labour>

50 Whoriskey, P. (2019) Chocolate companies sell 'certified cocoa.' But some of those farms use child labor, harm forests. Washington Post, 23 October. <https://www.washingtonpost.com/news/energy-environment/wp/2019/10/23/chocolate-companies-say-their-cocoa-is-certified-some-farms-use-child-labor-thousands-are-protected-forests/>

51 Cocoa Horizons website. <https://www.cocoa horizons.org/program>

52 Forum Nachhaltiger Kakao (German Initiative on Sustainable Cocoa) website. www.kakaoforum.de/en/

53 Belgian Sustainable Trade Initiative Beyond Chocolate website. <https://www.idhsustainabletrade.com/initiative/beyondchocolate/>

54 Fedecacao (2022) Maria del Campo. <https://www.fedecacao.com.co/maria-del-campo>

treating it a commodity. It is proposed to create a fully traceable system with a quick response (QR) code to track the beans back to the producer.⁵⁵

VI. APPENDIXES

Appendix 1: Focus on cadmium and related regulations

Cadmium is a toxic heavy metal, present in the soil of some cocoa plantations. It can accumulate in human tissue over time and can cause kidney and bone damage as well as being a carcinogen. Only 4–5% of ingested cadmium can be absorbed by the human body, with the rest accumulating in the kidneys. Cadmium can be found naturally in soil because of volcanic activity, forest fires and weathering of rocks. Therefore, its presence in cocoa beans is influenced by many factors, including geographic location, soil acidity and the cocoa variety used. Thus, the cadmium problem relates to beans from certain regions of certain producer countries, particularly in the Latin America and Caribbean region.

The EU recently set maximum limits for cadmium in cocoa products, which came into force on 1 January 2019. For chocolate, three maximum levels have been established depending on the content of the chocolate variety (Table 2). The strictest maximum levels apply to the chocolate varieties mostly eaten by children. The darker the chocolate, the higher the maximum levels. A fourth maximum level is set for cocoa powder destined for direct consumption.

Table 2. EU maximum residue levels for cadmium in cocoa products.

Specific cocoa and chocolate products as listed below - Milk chocolate with <30% total dry cocoa solids	0.10mg/kg as from 1 Jan 2019
Chocolate with <50% total dry cocoa solids; milk chocolate with ≥ 30% total dry cocoa solids	0.30mg/kg as from 1 Jan 2019
Chocolate with ≥ 50% total dry cocoa solids	0.80mg/kg as from 1 Jan 2019
Cocoa powder sold to the final consumer or as an ingredient in sweetened cocoa powder sold to the final consumer (drinking chocolate)	0.60mg/kg as from 1 Jan 2019
<small>'For the specific cocoa and chocolate products the definitions set out in points A. 2, 3 and 4 of Annex I to Directive 2000/36/EC of the European Parliament and of the Council of 23 June 2000 relating to cocoa and chocolate products intended for human consumption (OJ L 197, 3.8.2000, p. 19) apply</small>	

Sources: European Commission Regulation from the Commission (UE) 2021/1323 of 10 August 2021, and CAOBISCO, ECA and FCC (2016)

It is important to note that the final product (chocolate or cocoa powder) is tested for cadmium, not the imported cocoa beans themselves.⁵⁶ Therefore, if cocoa beans are rejected by importers, it is in anticipation of tests on the final products and not because of the level in the beans themselves.

However, it should also be noted that many projects financed by the EU support the transition of coca plantations into cocoa plantations, especially in Colombia and Peru (Figure 29). For this reason, some countries requested an increase in cadmium levels accepted by the EU, but the request was unsuccessful and the EU maintained its position on the matter.

⁵⁵ Manifesto Cacao website: <https://manifestocacao.com/>

⁵⁶ European Commission (undated). Cadmium in Chocolate. https://ec.europa.eu/food/system/files/2019-03/cs_contaminants_catalogue_cadmium_chocolate_en.pdf

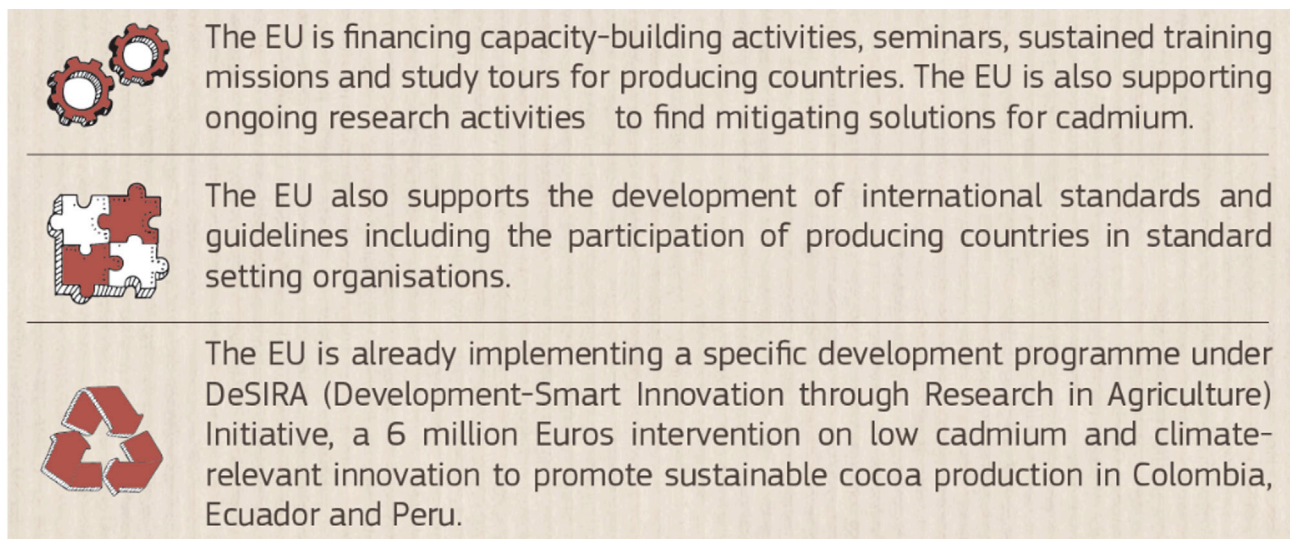


Figure 29. EU actions on cadmium in cocoa products. Source: European Commission.

According to the 2018 Report from the Commission to The European Parliament, The Council, The European Economic and Social Committee and The Committee of The Regions on Implementation of Free Trade Agreements,⁵⁷ the problem of cadmium in relation to Colombia, Ecuador and Peru is mentioned in the report on Latin American countries.

In 2019, Codex established its own limits on cadmium levels in chocolate, following a request from Ecuador, mainly to try to pressure the EU to increase its required levels; however, Codex implemented a slightly higher level for chocolate with over 70% cocoa solids of 0.9µg/kg, compared to 0.8µg/kg established by the EU for chocolate with over 50% cocoa solids. Codex is still debating a slightly higher level for chocolate with cocoa solids of 30% or less (0.3µg/kg, compared to the 0.1µg/kg established by the EU). However, Ecuador does not seem to agree with the limits established by Codex either.

From the private producer's point of view, this measure obliged them to look for alternatives to lower the absorption of cadmium itself. The University of the West Indies Cocoa Research Centre is studying the possibility that cocoa trees can be prevented from absorbing cadmium from the soil by planting companion crops that preferentially absorb it. It is also conducting large-scale analysis with varieties of cocoa, to see if there are varieties that are more or less likely to absorb cadmium from the soil. However, these studies will take several years to implement and may put some varieties of heirloom cocoa at risk.

In the meantime, blending high-cadmium cocoa with cocoa having lower levels also seems to be a possible alternative for some producers, although the search for the perfect bean is not a good solution for premium chocolate makers, because the traceability and the terroir of a prime single-origin cocoa bean is lost, to the detriment of local South American chocolate makers in particular. Some European importers blend different sources of cocoa to manage the level of cadmium. However, it may happen that some of them reject the cocoa beans, even though the final, processed cocoa would contain less cadmium than the raw material because of the blending but also because the chocolate-making process lowers the level of cadmium in the cocoa.

From the EU research side, a new, multidisciplinary and transdisciplinary research project financed by the European Commission's Development of Smart Innovation through Research in Agriculture (DeSIRA) initiative was launched in 2021. It is being implemented by the

⁵⁷ European Commission (2018) Report from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions. <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52018DC0728>

Alliance of Bioversity International, the International Center for Tropical Agriculture and other partners. The Clima-LoCa project focuses on mitigating the impacts of the new food safety regulations on cadmium in cocoa, and highlights the implications for productivity, climate resilience and the inclusion of small-scale cocoa farmers in Colombia, Ecuador and Peru. Such innovation may be technological (e.g. soil amendments or varieties), organisational (e.g. post-harvest strategies such as blending) or institutional (new rules governing processes in the value chain and new policies).

Discussion

The European Union has always taken the lead in regulating food safety. The measures introduced, in principle, are not intended to obstruct international trade but are designed to protect European citizens from hazardous products that may affect their health. However, the measures might be considered too strict, and taken without conclusive analysis. They might not be based on a hazard-based approach, but rather on risk assessments and scientific opinions from the European Food Safety Authority (EFSA).

Thus, some people consider that the decision to include chocolate in the list of products with high cadmium risk was not based on any direct effect that chocolate with a certain level of cadmium may have on human health. Instead, they say that it was based on EFSA's tolerable weekly intake (TWI) of 2.5µg/kg body weight, rather than the provisional monthly recommendation established by the Food and Agriculture Organization of the United Nations of 25µg/kg body weight, which is a TWI of around 3.57µg/kg body weight.

The conclusion of the Scientific Opinion of the Panel on Contaminants in the Food Chain on a request from the European Commission on cadmium in food stated: "Subgroups such as vegetarians, children, smokers and people living in highly contaminated areas may exceed the TWI by about 2-fold. Although adverse effects on kidney function are unlikely to occur for an individual exposed at this level." This conclusion means that even consumption of twice as much cadmium will not present any risk to human health. Nevertheless, chocolate was included on the list.

The limits were established by Regulation No. 488, causing distortions in the market for fine cocoa, especially coming from South American countries such as Ecuador and Peru, where the volcanic soil is more likely to lead to higher levels of cadmium in cocoa. Therefore, prices of fine cocoa with elevated levels of cadmium have fallen, and it has lost market share not only in Europe but worldwide.

Appendix 2: Colombian chocolate producers (non-exhaustive list)

Casa Luker SA

Chocolate factory with fine aroma cocoa.

It is a company with extensive experience in the manufacture of chocolate products and a wide range of mass consumption products.

It has more than 110 years of experience in the field (since 1906, the year in which it produced the first Luker chocolate bar, at Hacienda Enea in Manizales). It is probably the most emblematic chocolate company in Colombia.

It has a cocoa plant where it processes fine aroma cocoa, transforming it into chocolates (with more than 540 references for its customers). They buy 38% of the total cocoa production of Colombia (around 1,600 tonnes in average per month).

It has six certifications: ISO 9001:2015 Quality Management System, Hazard Analysis Critical Control Point (HACCP) Food Safety Management System, Business Alliance for Secure Commerce (BASC) Control and Safety Management System, Kosher Certification, Food Safety System Certification 22000 Food Safety Management System, and Non-GMO (genetically modified organism).

It offers a wide variety of chocolate products through its brands: Luker, Sol, Quesada, Don Sabroso and ChocoExpress. It also manufactures custom-made industrial products.

www.casaluker.com

+57 1 4473700

+57 1 8000112131

Calle 13 #68-98, Industrial Zone, Bogota
Colombia

National Chocolate Company SAS

Chocolate and snacks manufacturer.

It is a company that is part of Grupo Nutresa and whose activities include the manufacture of chocolate products, snacks and other nutritional products.

It has more than 100 years of experience in the market (since 1920).

It has two chocolate factories (or production plants) in Colombia, equipped with state-of-the-art technology and the highest quality standards to produce chocolate candies, chocolate drinks, nuts, cereal bars and chocolate ingredients for the industry.

It has various certifications: ISO 9001, ISO 14001, ISO 45001, BASC, British Retail Consortium (BRC), Business Process Management (BPM), HACCP, Kosher Certification and non-GMO, among others.

It is a supplier of a wide variety of chocolate products through its brands: Jet, Jumbo, Montblanc, Gol, Santander, Corona, Chocolisto, Chocolyne, Cruz, La Especial, Tesalia.

www.chocolates.com.co

+57 4 5311155

+57 1 8000 522121

(Factory): Via Autopista Medellín-Bogotá, Km. 2, Belén, Rionegro, Antioquia
Colombia

Triunfo SA Chocolate Factory

Chocolate and candy factory.

It is a company dedicated to the production and marketing of candies and chocolates, maintaining high quality standards.

It has more than 73 years of experience in the field (since 1947).

It has a production plant with a monthly capacity of around 100 tonnes of finished chocolate product and around 300 tonnes of confectionery.

It is a supplier of a wide variety of chocolate products including Triunfo brand bars, candies, assorted cases, chocolate figures and fine tablets.

www.chocotriunfo.com.co

+57 1 4205966

Cra. 68b #10-10, Bogota
Colombia

Macao Xocolatl	
<p>100% handmade chocolate factory.</p> <p>It has a chocolate shop dedicated to the production of handmade, original and natural chocolates.</p> <p>It has more than 16 years of experience in the market.</p> <p>It has production facilities with registration and sanitary concept, thus guaranteeing the products it delivers to the market.</p> <p>It offers a wide variety of products: healthy chocolates (with high fibre content, low in fat and without sugar), truffles and filled chocolates, alfajores (covered with chocolate) and decorative pieces.</p> <p>It also offers chocolates in presentation packs for corporate gifts and events.</p>	<p>+57 1 6917919</p> <p>WhatsApp: +57 315 3557224</p> <p>Cra. 49A #86D-35, Bogota Colombia</p>
MeLate Chocolate	
<p>Artisanal chocolate maker.</p> <p>It is a company specialised in 100% Colombian chocolates, handcrafted with the best quality ingredients, without additives or preservatives.</p> <p>It has more than 10 years of experience in the market (since 2010).</p> <p>It has an artisanal chocolate factory where it carries out the complete transformation process, from the cocoa bean (acquired from producers located in Urabá, Antioquia) to the final product, for pralines, chocolate bars and cup chocolate.</p> <p>It offers a wide variety of products: boxed chocolates, chocolate bars, chocolate drinks, desserts, pastries and corporate chocolates (for business gifts).</p>	<p>www.melatechocolate.com</p> <p>+57 310 5182624</p> <p>Cl. 83b #56-22, Itagüi, Antioquia Colombia</p>
Produl: Productora de dulces SAS	
<p>Manufacturer of chocolates and sweets.</p> <p>It is a Colombian company, located in Bogotá and dedicated to the production and marketing of sweets and fine chocolates from cocoa and 100% Colombian supplies.</p> <p>It has more than 17 years of presence in the market (since 2003).</p> <p>It has a production plant where it carries out the entire cocoa transformation process, from the cocoa bean (purchased directly from Colombian cocoa farmers) to the production of chocolate coatings and coated products with different chocolate-covered centers, in addition to obtaining other by-products derived from this process such as cocoa powder and cocoa butter.</p> <p>It is a supplier of a wide variety of chocolate products including dark and milk chocolate.</p> <p>It also offers chocolates, bonbons and almonds for corporate or advertising gifts.</p>	<p>www.produl.com.co</p> <p>+57 314 2106384</p> <p>Calle 25 Sur #8-67, Bogota Colombia</p>
Tropical Passion	
<p>Chocolate factory with tropical fruits. It is a company specialised in the manufacture of special chocolates made from selected tropical fruits and cocoa.</p> <p>It has a production facility where it uses ingredients of Colombian origin and does not add preservatives, dyes or artificial flavours. The basis of its manufacture is fresh fruit, selected, sanitised and prepared under an unprecedented technique developed at Tropical Passion and based on traditional knowledge.</p> <p>It uses packaging made mainly of sugarcane paper with a biodegradable seal.</p> <p>It offers a variety of products made from slices of 100% natural dehydrated fruit, with which it manufactures chocolate flower petals, chameleon tongues for children (no added sugar) and practical edible sheets for snacks.</p>	<p>www.tropicalpassion.com.co</p> <p>+57 1 5338263</p> <p>+57 311 5318590</p> <p>Dg. 115a #60-21, Bogota Colombia</p>

Colombina	
<p>It is one of Colombia's biggest producers of industrial candies and chocolates, with more than 90 years of experience. It is the biggest player in the confectionary industry in the Andean region, Caribbean and Central American markets with a turnover of over US\$600 million. Columbina produces well known brands like Nucita, Moments, Choco Break and Chocoballs. Its products are specialised for large-scale distribution.</p> <p>It has most quality certifications (e.g. ISO 9001, 14000, 22000; BPM; HACCP; BRC; BASC and Kosher).</p>	<p>https://colombina.com/ NIT 890.301.884-5 Carrera 1 # 24 - 56. Santiago de Cali +57 2 8861999</p>
Daza Cacao Premium	
<p>Produces and exports chocolate of Araucanian origin, made with fine aroma Colombian cocoa, which has been recognised on several occasions at the Chocolate Show in Paris. Products are designed for the premium chocolate market, placing special value on 100% natural products derived from cocoa of the highest quality, without additives.</p>	<p>http://www.dazacacao.com/ Cl. 15 Tame, Arauca, Colombia</p>
Equiori	
<p>Produces organic chocolate and cocoa products. It is the only brand providing organic chocolate from Colombia. Handles around 100 ha of certified plantations and exports to Europe under the brand Pakka.</p>	<p>https://equiori.co/ Calle 12F # 3-8, Oficina 203 Bogotá, Colombia (+57) 314 503 7596 hola@equiori.co</p>



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