Chapter 8

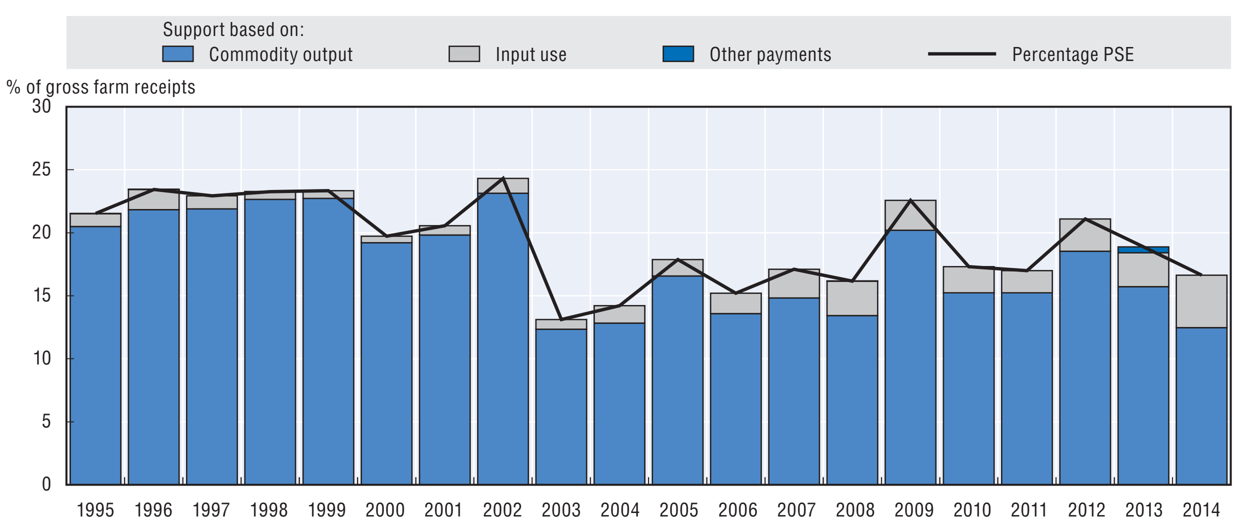
Colombia

The Colombia country chapter includes a brief evaluation of policy developments and related support to agriculture, contextual information on the framework in which agricultural policies are implemented and the main characteristics of the agricultural sector, an evaluation of support in 2013-14 and in the longer term perspective, and a brief description of the main policy developments in 2013-15.

Evaluation of policy developments

- Agricultural policies in Colombia are mostly based on policy instruments that are production and trade distorting, such as market price support (three-quarters of support to producers), ad hoc payments based on output, and unconstrained support based on variable input use. PSE averaged 19% of gross farm receipts in 2012-14 and general services (GSSE) accounted for only 15% of total support to the sector (TSE) during the same period. MPS represented 76% of the PSE, while budgetary transfers contributed the remaining 24%.
- Investments in general services to agriculture have been low during the last two decades, while the Colombian agricultural sector continues to faces numerous structural challenges. Policy efforts should focus on strategic investments like land restructuring and land tenure system (e.g. more than 40% of land ownership is informal), investments in irrigation and improvement of regulatory oversight on water supply, usage and storage; investments in transport infrastructure, strong R&D and innovation capacity of the sector; animal and plant health protection and control services; promotion of sustainable use of natural resources, investments in a national and functional extension/training and technical assistance system that fosters technology adoption in agri-food chains. Without adequate investment in these areas it will be very difficult to improve productivity, competitiveness and ensure the sustainable development of the sector.
- As new programmes are being created more clarity is needed. Currently, the majority of programmes cover very broad and different areas and thus, are implemented through a bundle of policy instruments, the impact of which can be difficult to measure and evaluate. For example, programmes that cover variable inputs subsidies can partly deal with funding of general services. The efficiency of allocating budgetary resources is therefore also hard to assess. A thorough review and impact assessment of the wide array of policy instruments and programmes to support agriculture, including those implemented by private producer associations with government outlays, would allow the redefinition and reorganisation of policy instruments based on evidence of costs and benefits. Institutional co-ordination should be improved and information better disseminated to farmers.
- Moving away from production- and trade distorting policy instruments towards measures to improve market functioning and investment in general services would help building sustainable growth and competitiveness in the sector.

Figure 8.1. **Colombia: PSE level and composition by support categories, 1995-2014**



Source: OECD (2015), "Producer and Consumer Support Estimates", *OECD Agriculture Statistics* (database), *http://dx.doi.org/10.1787/agr-pcse-data-en*.

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Contextual information

Colombia is the fifth largest and the third most populous country in Latin America, with a surface of 1.1 million km^2 and a population of 47 million people. The only South American country that borders both the Atlantic and the Pacific Oceans, Colombia also has abundant agricultural land and fresh water, is very biodiverse and is rich in natural minerals and fossil fuels. The share of agriculture in GDP declined from 15.3% in 1995 to 6.1% in 2013. The share in employment also experienced a decrease from 21.6% in 1995 to 17% in 2013. The sector makes an important contribution to national exports, with agro-food exports accounting for 11% of all exports in 2013. Colombia is a net exporter of agricultural and food products with a net surplus of USD 722 million in 2013. Colombia, like other Latin American countries, has a highly dualistic distribution of land ownership, the roots of which can be traced back to the colonial era. The sector is dominated by small-scale units, with two-thirds of farms smaller than 5 ha (about 4% of agricultural land) and only 0.4% of farms with more than 500 ha (representing close to half of agricultural land) (IGAC, 2012).

Table 8.1. **Colombia: Contextual indicators, 1995, 2013[1]**

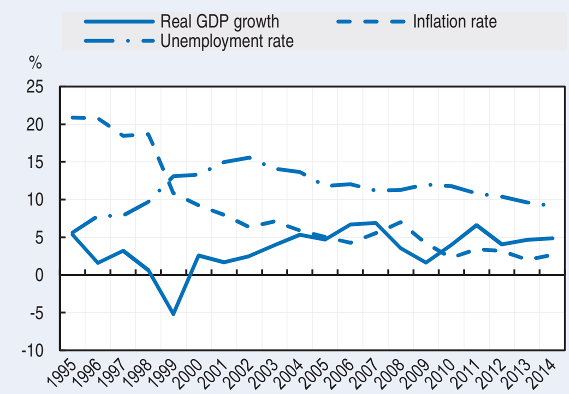
	1995	2013[1]
Economic context		
GDP (billion USD)	100	378
Population (million)	37	47
Land area (thousand km^2)	1 110	1 110
Population density (inhabitants/km^2)	32	42
GDP per capita, PPP (USD)	6 611	12 695
Trade as % of GDP	12.5	15.6
Agriculture in the economy		
Agriculture in GDP (%)	15.3	6.1
Agriculture share in employment (%)	21.6	16.9
Agro-food exports (% of total exports)	33.8	11.1
Agro-food imports (% of total imports)	9.9	9.7
Characteristics of the agricultural sector		
Agro-food trade balance (million USD)	2 074	722
Crop in total agricultural production (%)	58	59
Livestock in total agricultural production (%)	42	41
Agricultural area (AA) (thousand ha)	44 513	42 618
Share of arable land in AA (%)	5	4
Share of irrigated land in AA (%)	..	..
Share of agriculture in water consumption (%)	..	..
Nitrogen balance, kg/ha	..	..

1. Or latest available year.

Sources: *OECD Statistical Databases*, *UN Comtrade Database*, *World Development Indicators* and national data.

StatLink http://dx.doi.org/10.1787/888933235245

Figure 8.2. **Colombia: Main macroeconomic indicators, 1995-2014**



Source: OECD Factbook Statistics.

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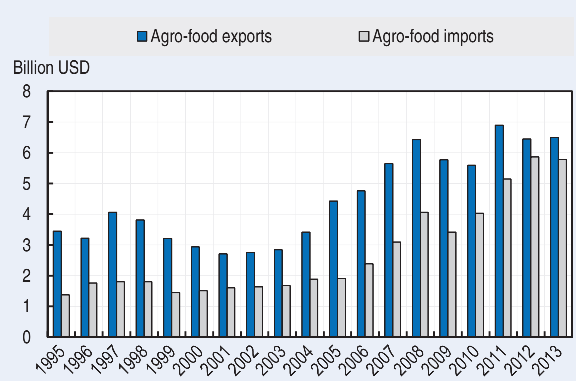
Figure 8.3. **Colombia: Agro-food trade, 1995-2013**



Source: UN Comtrade Database.

StatLink http://dx.doi.org/10.1787/888933234627

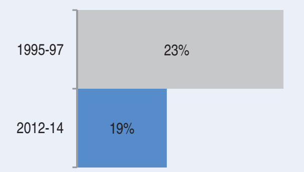
Note: Detailed definitions of contextual indicators and their sources are provided in the "Reader's guide".

Development of support to agriculture

Colombia's aggregate level of support to producers (%PSE) averaged 19% of gross farm receipts over the period 2012-14. Market price support (MPS) is the predominant component of PSE with an average share of 76% over the period 2012-14. MPS is mostly determined by the use of border measures, such as the Andean Price Band System (SAFP), for several agricultural products (e.g. maize, rice, poultry, milk, sugar, and pig meat). Budgetary transfers accounted for 24% of the PSE over the period 2012-14 and have been dominated by payments based on variable input use. In 2013 and 2014, however, large payments based on output were made to coffee producers. Outlays for the GSSE in Colombia have been quite small, accounting on average for 15% of the TSE during the period 2012-14.

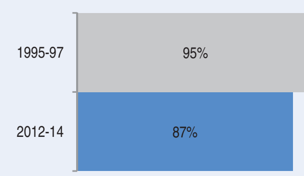
PSE as % of receipts (%PSE)

Since the 1990s Colombia has provided significant levels of support to its farmers. The PSE for 2012-14 was 19% of gross farm receipts, above the OECD average of 18% for the same period. In the latest years the %PSE has steadily declined from 21% in 2012 to 16.6% in 2014.



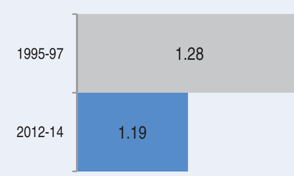
Potentially most distorting support as % of PSE

More than 75% of PSE is linked to commodity market price support alone. Variable input use support (without input constraints) accounts for 12% of PSE. These two types of support are considered to be the most production and trade distorting measures.



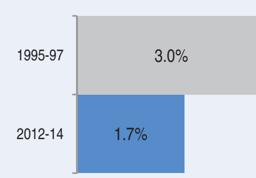
Ratio of producer price to border price (NPC)

Prices received by farmers, on aggregate, have been estimated to be 19% higher than those observed in the world markets.

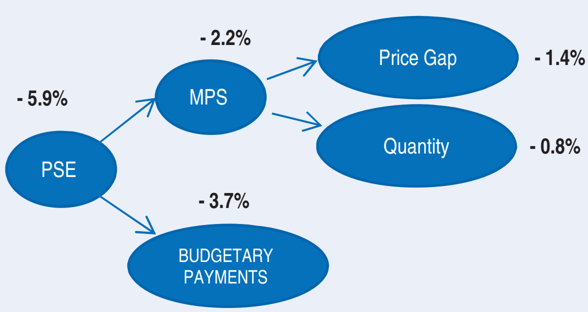


TSE as % of GDP

Total support to agriculture represents 1.7% of GDP for the period 2012-14, which is higher than the OECD average off 0.8%. The share of GSSE in TSE is 15%.

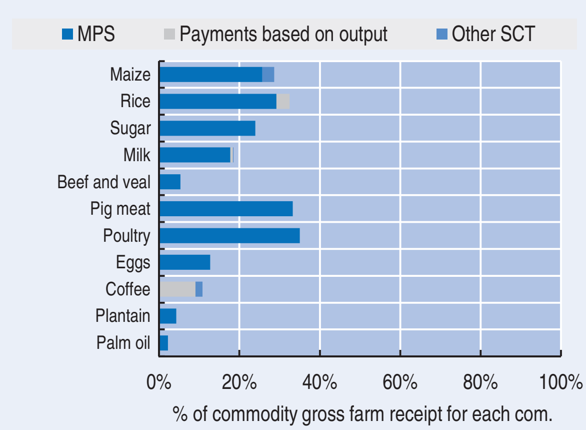


Decomposition of change in PSE, 2013 to 2014



The level of support in 2014 has declined due to a reduction of both MPS and budgetary payments.

Transfer to specific commodities (SCT), 2012-14



The most important Single Commodity Transfers (SCT) were for poultry, pig meat, rice, maize, sugar and milk, with 35%, 33%, 32%, 28%, 24% and 18.5% respectively of commodities gross farm receipts.

Table 8.2. Colombia: Estimates of support to agriculture

Million COP

	1995-97	2012-14	2012	2013	2014p
Total value of production (at farm gate)	**14 671 678**	**52 772 935**	**49 694 000**	**52 221 879**	**56 402 926**
***of which:** share of MPS commodities (%)*	72.9	78.9	77.8	76.2	82.8
Total value of consumption (at farm gate)	**10 956 358**	**45 720 540**	**43 936 630**	**46 313 245**	**46 911 745**
Producer Support Estimate (PSE)	**3 375 282**	**10 370 839**	**10 774 095**	**10 476 561**	**9 861 860**
Support based on commodity output	3 193 752	8 529 347	9 468 226	8 726 838	7 392 976
Market Price Support[1]	3 166 039	7 868 106	9 400 106	7 215 514	6 988 697
Payments based on output	27 712	661 241	68 120	1 511 323	404 279
Payments based on input use	180 958	1 754 931	1 305 869	1 490 041	2 468 884
Based on variable input use	130 669	1 120 594	864 499	1 035 400	1 461 881
with input constraints	112 678	635 731	391 195	768 588	747 409
Based on fixed capital formation	23 536	359 651	277 085	272 513	529 355
with input constraints	5 049	156 635	101 370	144 730	223 804
Based on on-farm services	26 753	274 687	164 284	182 128	477 648
with input constraints	0	127 020	79 945	94 673	206 441
Payments based on current A/An/R/I, production required	572	86 561	0	259 682	0
Based on Receipts / Income	0	0	0	0	0
Based on Area planted / Animal numbers	572	86 561	0	259 682	0
with input constraints	0	0	0	0	0
Payments based on non-current A/An/R/I, production required	0	0	0	0	0
Payments based on non-current A/An/R/I, production not required	0	0	0	0	0
With variable payment rates	0	0	0	0	0
with commodity exceptions	0	0	0	0	0
With fixed payment rates	0	0	0	0	0
with commodity exceptions	0	0	0	0	0
Payments based on non-commodity criteria	0	0	0	0	0
Based on long-term resource retirement	0	0	0	0	0
Based on a specific non-commodity output	0	0	0	0	0
Based on other non-commodity criteria	0	0	0	0	0
Miscellaneous payments	0	0	0	0	0
Percentage PSE (%)	**22.6**	**18.9**	**21.1**	**18.9**	**16.6**
Producer NPC (coeff.)	**1.28**	**1.19**	**1.24**	**1.19**	**1.13**
Producer NAC (coeff.)	**1.29**	**1.23**	**1.27**	**1.23**	**1.20**
General Services Support Estimate (GSSE)[2]	**319 320**	**1 834 091**	**1 847 596**	**2 138 354**	**1 516 322**
Agricultural knowledge and innovation system	80 888	413 238	404 313	378 562	456 840
Inspection and control	10 938	130 827	104 413	153 772	134 298
Development and maintenance of infrastructure	227 494	1 262 821	1 330 381	1 597 780	860 302
Marketing and promotion	0	27 203	8 490	8 239	64 881
Cost of public stockholding	0	0	0	0	0
Miscellaneous	0	0	0	0	0
Percentage GSSE (% of TSE)	**8.7**	**15.0**	**14.6**	**17.0**	**13.3**
Consumer Support Estimate (CSE)	**-3 105 722**	**-8 598 959**	**-10 063 043**	**-8 016 699**	**-7 717 135**
Transfers to producers from consumers	-2 872 668	-7 400 307	-9 252 578	-7 060 337	-5 888 004
Other transfers from consumers	-241 806	-1 239 278	-840 288	-986 101	-1 891 443
Transfers to consumers from taxpayers	0	0	0	0	0
Excess feed cost	8 751	40 626	29 824	29 740	62 313
Percentage CSE (%)	**-28.2**	**-18.9**	**-22.9**	**-17.3**	**-16.5**
Consumer NPC (coeff.)	**1.40**	**1.24**	**1.30**	**1.21**	**1.20**
Consumer NAC (coeff.)	**1.39**	**1.23**	**1.30**	**1.21**	**1.20**
Total Support Estimate (TSE)	**3 694 602**	**12 204 929**	**12 621 692**	**12 614 914**	**11 378 182**
Transfers from consumers	3 114 473	8 639 584	10 092 867	8 046 439	7 779 447
Transfers from taxpayers	821 934	4 804 623	3 369 113	5 554 577	5 490 178
Budget revenues	-241 806	-1 239 278	-840 288	-986 101	-1 891 443
Percentage TSE (% of GDP)	**3.0**	**1.7**	**1.9**	**1.8**	**1.5**
GDP deflator (1995-97=100)	**100**	**355**	**350**	**355**	**359**

Note: 1995-97 and 2012-14: unweighted averages. p: provisional. NPC: Nominal Protection Coefficient. NAC: Nominal Assistance Coefficient.

A/An/R/I: Area planted/Animal numbers/Receipts/Income.

1. Market Price Support (MPS) is net of producer levies and excess feed cost. MPS commodities for Colombia are: maize, rice, sugar, milk, beef and veal, pig meat, poultry, eggs, bananas, plantains, coffee, palm oil and flowers.

2. A revised GSSE definition with new categories was introduced in 2014. When possible, the revision was implemented for the whole time series. The GSSE series and the resulting TSE are not comparable with the series published previously. (For more details see the Annex 1.A1 to Chapter 1).

Source: OECD (2015), "Producer and Consumer Support Estimates", *OECD Agriculture statistics* (database). doi: dx.doi.org/10.1787/agr-pcse-data-en

StatLink *http://dx.doi.org/10.1787/888933235252*

Description of policy developments

Main policy instruments

The current framework for agricultural policy design is being shaped by the National Development Plan (PND) 2014-18, the Mission for the Transformation of the Countryside initiative (*Misión para la Transformación del Campo*), and the peace negotiations between the Colombian government and the Revolutionary Armed Forces of Colombia (FARC).

Domestic markets for many products are protected by import tariffs, tariff rate quotas and in particular the Andean Price Band System (SAFP). The SAFP aims to stabilise import prices for 13 commodities and their related first-stage processed products: rice, barley, yellow maize, white maize, soya beans, wheat, unrefined soya bean oil, unrefined palm oil, unrefined sugar, refined sugar, milk, chicken cuts and pig meat. The system establishes a floor price (lower band) and a ceiling price (higher band). When the international price is below the floor price, an additional import duty is imposed, and when the international price exceeds the ceiling price, a tariff reduction is granted. Meanwhile, the Free Trade Agreements (FTAs) signed and enforced by Colombia in recent years foresee a gradual phase-out of its application in relation to its main trading partners (e.g. the FTA with the United States in force since 2012). The average MFN applied for agricultural products is 15.8% compared to 5% for industrial goods. Colombia bound all of its tariffs in the Uruguay Round at rates varying between 15% and 227%. The highest average MFN tariffs are being applied for the groups of dairy products (43.5%) and animal products (20.8%).

Producer associations finance and administer the commodity Price Stabilisation Funds (FEP), which function on the basis of transfers to and from farmers. Six commodities are covered by a fund: cotton, cocoa, palm oil, sugar, beef and milk. FEPs make payments to producers when the selling price of a product falls below a minimum (floor) price. When the sales price of a product is higher than an established maximum (ceiling) price, producers contribute to the FEPs. The ceiling and floor prices are established by a Council formed by stakeholders and government, based on selected international prices for each product, while the transfers and compensations take into account a reference price indicator at which the products reach the market. While these funds currently do not represent government outlays, the government provided the initial capital for their set-up and is part of the Council that establishes the level of prices (floor or ceiling), furthermore (except for beef and cotton) these products are protected under the SAFP. These two combined mechanisms, SAFP and the FEPs, influence domestic prices which are normally higher than international prices.

Ad hoc payments based on output have been given to coffee, rice, cocoa and milk producers over the last four years (2011-14). The coffee support programme (PIC) has been the most important with government outlays in 2013 of around COP 1 trillion (USD 550 million), but only COP 68 billion (USD 14 million) in 2014. These payments were established to compensate production losses due to bad weather conditions (*Ola Invernal*) that hit the country during the season 2010-11.

Several programmes provide variable input support, as well as payments based on output and investment support:

- The commercialisation fund project, which is the most important in terms of outlays spent in 2014, has various components with different implementation mechanisms that provide mainly input subsidies, payments based on output, and include promotion programmes of agricultural products.

- The Rural Development with Equity programme (DRE) through its four components (the Rural Capital Incentive -ICR, the Special Credit Line-LEC, technical assistance support and subsidies for land adequacy) provides input subsidies, ranging from variable inputs like purchases of seed or renovation of crop plantations, to fixed capital formation such as subsidies for farm irrigation and drainage infrastructure, and on-farm services like subsidies for individual technical assistance as well as credit. The Commercialisation Fund and the DRE programmes accounted for more than COP 850 billion (USD 425 million) in 2014 contributing to around 33% of total government outlays administered by the Ministry of Agriculture.
- The Productive Alliances programme seeks to link smallholders with formal marketing structures. It finances investments and has components of variable inputs subsidies, fixed capital formation subsidies, on-farm services, as well as components of general services. Funds under the productivity improvement of agricultural and fisheries sector initiative, created in 2013, also provide multiple variable and fixed input subsidies.

In addition to the above programmes, financing instruments relate to the access to credit (including subsidised credit interest rates), debt rescheduling and insurance programmes. These financial policy instruments account for more than one third of budgetary outlays:

- The Financing Fund for the Agricultural Sector (FINAGRO) is a second-tier bank that provides funds to first-tier banks. Through this mechanism, farmers are able to access credit at preferential interest rates. Specific credit lines are for: i) working capital and marketing; ii) investment; and iii) the normalisation of portfolios, which includes alternatives for farmers to adjust their financial debt. In 2013-14, farmers have also been benefiting from debt rescheduling and sporadic write-offs.
- The National Agricultural Solidarity Fund (FONSA) provides financial support through partial or total debt relief to small agricultural and fishing farmers faced with climate, phytosanitary or pest issues. This includes debt restructuring (which applies to current loans), and refinancing and debt consolidation (which applies to current loans and overdue loans). FONSA outlays for 2014 were around COP 315 billion (USD 157 million) and the implicit subsidy coming from FINAGRO's preferential interest rates was estimated at COP 231 billion (USD 115 million).
- The National Agricultural Revitalisation Programme (PRAN) provides resources to restructure liabilities, adjust overdue loans and end litigation processes, as well as providing producers with the opportunity to reinstate their credit rating. Both FONSA and PRAN are part of the debt rescheduling and debt relief pillar of FINAGRO.
- FINAGRO also manages the Agricultural Guarantee Fund (FAG) that provides collateral to farmers, particularly smallholders.
- The government subsidises up to 80% of agricultural insurance premium, depending on the type of producer and whether the area to be insured has been financed with credit resources of FINAGRO.

Outlays for the GSSE have only been around 9% of TSE for the period 1994-2014, with a slight increase in 2014 (13% of TSE). Some general services include agricultural research and transfer, inspection and control, infrastructure (including farm restructuring), marketing, and promotion. In 2013-14, as regards agricultural knowledge generation, new programmes began to address the sector's adaptation to climate change; research projects for science, technology and innovation; and the strengthening of methodologies and planning for agricultural land use. New programmes directed at agricultural knowledge transfer have also been set-up in 2013-14.

In 2013-14, product safety and inspection programmes have addressed issues such as the genetic improvement of cattle herds, support to the network of laboratories in view of accreditation of quality standard ISO 17025, the Animal Traceability Programme – *IDENTIFICA*, and specific support to sanitary and phytosanitary requirements for agricultural exports. Pest and disease inspection and control programmes have received additional funding in 2013-14. The most significant programmes focused on input control include the development of animal, plant and microbial germplasm banks, as well as seed certification.

Programmes with a focus on ensuring the suitability of land for agricultural purposes have also been implemented in 2013-14. Referred to as adequacy of land, programmes implemented through the National Fund for Land Adequacy or Improvement provides irrigation and drainage infrastructure. These projects have also been complemented by financial support destined to studies and planning of land use in rural areas according to social, economic and environmental criteria, implemented by the Agricultural Rural Planning Unit (UPRA).

Farm restructuring has been dominated over the recent years by programmes addressing land issues of displaced population. The 2010-14 government implemented in 2011 a legal and operational framework for restituting land rights to those who were disposed as a cause of the long-standing internal conflict. The Victims and Land Restitution Law (*Law 1448 of 2011*) constitutes the first piece of legislation enacted to redress the suffering caused to millions of victims and internally displaced persons by the country's internal conflict. A complementary programme includes allocating land formerly used for illicit crops to conflict victims or poor farmers. Land formalisation programmes have seen their budget double in 2014 compared to 2013, while a similar budget was allocated in 2014 to address land issues (titling and adequacy) of indigenous and Afro-Colombian communities. MADR has engaged in 2013-14 in the marketing and promotion of certain agro-food products, such as promotion campaigns for milk and panela consumption, and promotion for the flowers sector.

Critical areas such as infrastructure for agricultural production and marketing, agricultural knowledge and agricultural knowledge transfer, and farm restructuring have received limited or no support. This, combined with poor land management, inefficient land tenure system (i.e. 40% of land ownership is informal) and a long-running internal conflict closely linked to drug trafficking, has deeply affected the evolution and performance of the Colombian agricultural sector. Although efforts have been made and agricultural R&D has received additional funding since 2010, more is needed to develop the enabling environment for an inclusive and sustainable agricultural growth.

Domestic policy developments in 2013-15

A commitment to agriculture and rural development was the first point agreed in the peace negotiations between the government and the Revolutionary Armed Forces of Colombia (FARC) that started in 2013. The agreement reached in May 2013 with the FARC includes issues such as access to and use of land resources, rural infrastructure and land adaptation programmes, social development, as well as incentives for agricultural development and food security.

The Agrarian Pact (*Pacto Agrario*), which includes subsidies and import measures, was launched in September 2013 in response to farmer protests. In early 2015, MADR launched the Rural Coordination Plans (*PARES*), which should allow producers to participate in the identification and definition of the projects to be financially supported; this first stage selection is then followed by consultations at local level, with the rural communities, social organisations, as well as central and municipal authorities (MADR, 2015).

In 2014, several programmes targeting family agriculture have been initiated and are meant to foster producer associations, product storage and marketing, as well as improved productivity and value-added generation. These programmes provide payments based on input use (variable input use, fixed capital formation, and on-farm services), and also have components of agricultural knowledge transfer (training). Two complementary programmes have been set up in 2014 in order to support competitiveness improvement of main agricultural products. These programmes provide on-farm services, as well as development and maintenance of storage, marketing and other physical infrastructure. One of the programmes is being implemented within the framework of the *Contratos Plan* – a tool aimed at promoting co-ordination among the various local authorities in order to boost regional development. The programme *Agroágil* was initiated in 2015 and aims to provide new banking solutions to all farmers, with particular emphasis on providing timely access to credit, as well as financial solutions tailored to the production cycle.

Trade policy developments in 2013-15

Colombia joined the WTO in 1995 as an original participant in the GATT and has signed several free trade agreements over the past 20 years, mainly with other American countries. In 2013, Colombia signed Free Trade Agreements (FTAs) with ***Korea*** (February), ***Costa Rica*** (May), ***Panama*** (September) and ***Israel*** (September), but these are not yet in force. In December 2014, the Colombian Senate approved in a first debate the Colombia-Korea FTA. The Colombia-Costa Rica FTA was ratified by Costa Rica in May 2014, while the Colombian Senate approved it in a second debate in November 2014. At a pluri-lateral level, Colombia is part of the Pacific Alliance Agreement. In February 2014, Colombia, Chile, Mexico and Peru signed the Additional Protocol to the Framework Agreement which liberalises 92% of their trade, with the remaining 8% over the coming years. The Government of Colombia forwarded the Additional Protocol to the Senate in September 2014. FTAs with Japan and Turkey are still under negotiation (MADR, 2013; OAS SICE, 2015).

The FTA with the ***United States*** entered in force in May 2012, while the FTA with the European Union entered in force in August 2013. The agreement with the United States provides for changes to domestic support and specifically the phasing out of the Andean Price Band System. For fruit and vegetables, Colombia obtained immediate market access to the US market, its sugar quota was tripled and a preferential quota was introduced for dairy products. The FTA with the EU provides Colombia new preferential market access for key agricultural products such as sugar, tobacco, flowers, palm oil, coffee, bananas and other fruits, and beef. Products considered sensitive such as maize, rice, sorghum, soybeans, pig meat and poultry were excluded from the tariff reduction process (MADR, 2013; MinCIT, 2013).

Following a wave of farmer protests in the second half of 2013, the Colombian government implemented a series of trade policy measures that affected elements of import duties, safeguards and tariff rate quotas. The government implemented three primary trade policy instruments, going in hand with the Agrarian Pact mentioned in the previous section: reducing import duties on agricultural inputs; eliminating a general 3 000 tonnes tariff rate quota (TRQ) for whey protein dairy products from countries that do not have an ongoing trade agreement with Colombia; reviewing and implementing trade safeguards. As a result, in October 2013, the government published safeguard quotas for the next two years for Andean Community (CAN) member countries Peru, Bolivia, and Ecuador, and for MERCOSUR members – Argentina, Uruguay, and Brazil – for the following products: fresh potatoes, pre-cooked and frozen potatoes, onions, dried beans, peas, tomatoes, pears, powder milk and other dairy products. These safeguard quotas are applicable for two years and are administered on a "first come, first served" basis (MADR, 2014; USDA GAIN, 2014).

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