

GLOBAL FOOD MARKETER™ NEWSLETTER

Export news from the Midwest and Northeast



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COMPLETE YOUR 2016 EXPORT PLAN USING FOOD EXPORT'S NEW, INTERACTIVE WEBSITE!

As you may have noticed, we updated our website earlier this month and created a new, interactive design that is easier to navigate, providing you with the information you need to grow your export business. The homepage now provides more activity information and direct links leading you to programs and services that are the best fit for your company. Additionally, the new site boasts easier access to upcoming programs that have approaching registration deadlines.

Food Export is also developing a new Export Services Directory, enabling you to search for vendors that can provide the services you need on your export journey—everything from logistics support and freight forwarders, to translation and interpreter services. We'll also be updating our popular Online Product Catalog feature in the months to come, making it even easier for you to get international trade leads for your specific products.



These new features, coupled with our new, modern registration processes, educational tools and more information about industry events and news, will make www.foodexport.org your daily online destination. More new features are coming in the months ahead—we'll keep you posted as they are rolled out!

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Register for an Online Account!

Be sure to register for an online account on www.foodexport.org to make the most of your customized online experience—it's quick and easy! Just click on Register at the top right corner of our homepage.



MARKET FOCUS: CHINA

According to euromonitor.com, China is growing more rapidly than any other major economy, although the pace in 2014 was the slowest in more than 20 years. Real Gross Domestic Product (GDP) was forecast to grow by 7.1% in 2015, down from 7.3% in 2014.

In 2014, China's population was almost 1.4 billion—an increase of more than 385 million since 1980. China is rapidly urbanizing. As recently as 1980, less than 20% of China's population lived in cities, but today more than half of all Chinese live in urban areas and up to 70% are expected to be urbanites by 2030.

The median age in China is steadily rising. In 2014, it was 40.8 years—18.4 years greater than the figure for 1980. In fact, population aging is occurring more quickly in China than in most other countries. In 2014, the number of those over 65 years had reached 158.6 million. This figure represented 11.7% of total population, up from just 4.7% in 1980. In 2020, a projected 15.9% of all Chinese will be over 65 years.

China's increased wealth has led to an increase in consumption of imported food and agricultural products. Chinese imports of U.S. food and agricultural products increased from \$13.1 billion in 2009 to \$24.5 billion in 2014. That represented an increase of 87% and China remains the largest export market for agricultural products.

BEST PRODUCT PROSPECTS

Consumer oriented foods with the highest potential in the Chinese market include: nuts, dried fruit, seafood, poultry meat, frozen vegetables (especially sweet corn), baby food, dairy products, baking ingredients, bread bases, cereals, frozen potato products, fresh fruit, and premium ice cream. Products not present in significant quantities which have good sales potential include processed dried fruit (blueberries and cranberries), Mexican and Indian food, ready to cook and ready to eat foods, natural and organic foods (niche market) and functional foods.

IS CHINA THE RIGHT MARKET FOR YOU

Food Export provides the services, activities, and support you need to help determine if China is the right market for your product. If you're interested in developing potential export sales, exploring new markets, meeting global buyers, or receiving funding assistance in marketing your products overseas, contact us.

UPCOMING ACTIVITIES IN CHINA



Food Show PLUS!™ at SIAL China

May 4-7, 2016, Shanghai, China

Early Registration Deadline:

January 13, 2016 - \$225

Registration Deadline:

February 10, 2016 - \$350

Food Show PLUS!™ at Food & Hotel China

November 7-10, 2016, Shanghai, China

Early Registration Deadline:

July 18, 2016 - \$225

Registration Deadline:

August 15, 2016 - \$350

SUCCESS STORY

KANSAS COMPANY EXPANDS IN CANADA THROUGH BUYERS MISSION



March 2014, Nu Life Market, located in Scott City, Kansas, attended Food Export's Natural Products Buyers Mission at the Natural Products Expo West Show. There they met with a broker from Canada who was very interested in their gluten-free flour, bran and grain.

According to CFO Kelsey Baker, "Food Export's Buyers Mission helps us meet international buyers that we would otherwise not have the opportunity to interact with. Using the Branded Program

helps our company exhibit at tradeshows, which gives us significant exposure and is strongly responsible for our growth." Post event Nu Life was able to report \$120,500 in sales to Canada. As a result, Nu Life has expanded production in their ingredient products area and hopes to produce a new product label for Canada starting next year.

Nu Life Market is a producer of grains and flours in health and wellness foods. Their products are produced under strict food safety protocol in a dedicated gluten free, dairy free, peanut free, and soy free facility. Nu Life takes great pride in the fact that they process, clean, inspect, package and ship only the highest quality products from their manufacturing plant.

NEWS STORIES

PROTEIN POSITIONING ON THE RISE

Protein content has been one of the key areas of activity in new product development in the food and drinks industry over the past couple of years, finds IFT.org. According to Innova Market Insights, nearly 4% of global launches in the 12 months that ended in June 2015 used a high-in or source-of protein positioning, rising to nearly 8% in the dairy sector and 14% in the yogurt category.

In Europe, recent launches include Lactel's Sporteus protein-enriched milk drinks in France, positioned as sports beverages; the leading U.S. protein shake Muscle Milk Protein in Germany; and Austrian dairy company Nöm's extension of its fasten flavored milk range with a fasten Protein Drink option.

Yogurts and milk drinks are the current leaders in terms of activity, but there may also be opportunities in other products such as cheese, particularly soft and fresh products, reports IFT.org.

FOOD EXPORT ASSOCIATION OF THE MIDWEST USA® AND FOOD EXPORT USA®-NORTHEAST

We are non-profit organizations comprised of state agricultural promotion agencies that use federal, state, and industry resources to promote the export of Midwestern and Northeastern food and agricultural products.

Food Export-Midwest and Food Export-Northeast administer many services through Market Access Program (MAP) funding from the Foreign Agricultural Service (FAS) of the USDA.

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NEWS STORIES

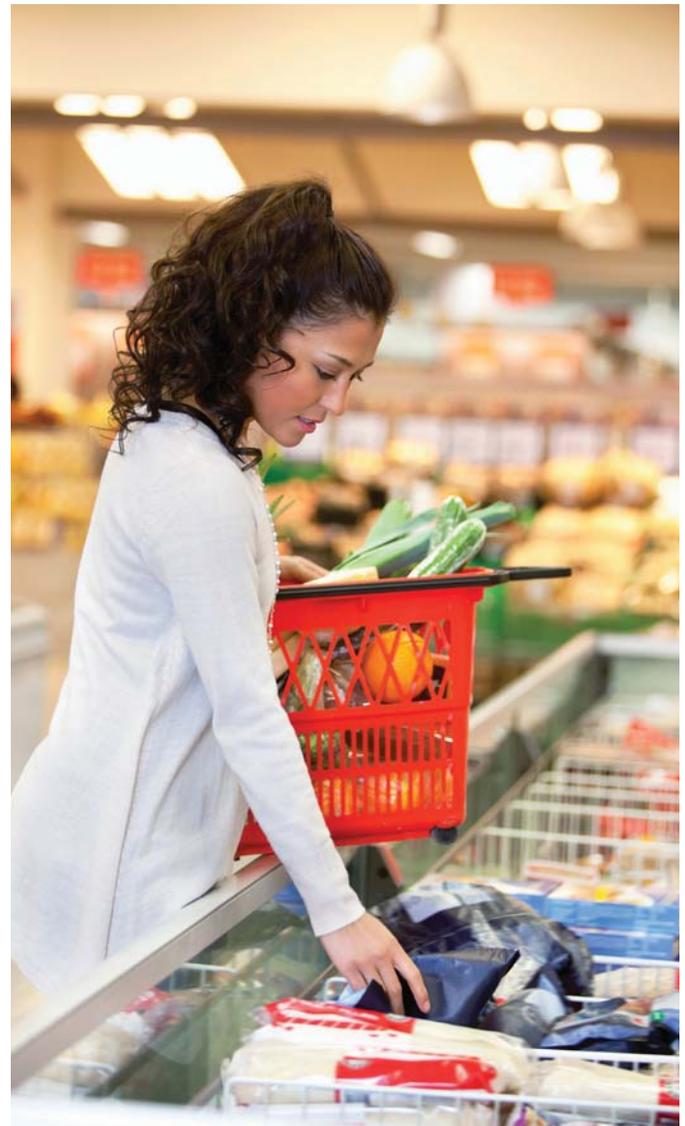
GLOBAL FROZEN FOOD MARKET CONTINUES TO EXPAND

According to a report by Transparency Market Research (TMR) entitled "Frozen Food Market - Global Industry Analysis, Size, Share, Growth, Trends and Forecast, 2013 - 2019," product innovation, surging demand from emerging economies, and the growing popularity of ready-to-eat meals are the main factors that fuel the global frozen food market. Busy and hectic lifestyles are also reasons why people today are choosing frozen foods. TMR predicts the global frozen food market, which in 2012 was valued at \$224.7 billion, to reach \$293.7 billion by 2019.

Another prominent factor driving the global frozen food market is the growing population of working women. Frozen foods are considered to be the next generation convenience foods. Furthermore, the global frozen food market is consistently expanding with high focus on developing freezing techniques that do not affect the nutritional content in frozen fresh foods such as vegetables and fruits.

The TMR report found with a share of more than 35%, Europe held the highest share of the global frozen food market in 2012. Ongoing market trends suggest that revenue-wise, the Europe frozen food market will expand at a 3.8% CAGR from 2013 to 2019. With a consumption share exceeding 15%, Germany holds the highest share of the Europe frozen food market. The Asia Pacific frozen food market (with China and India leading the way) is expected to be the dominant regional player in the global frozen food market.

Meet one-on-one with international buyers looking for U.S. frozen food products at Food Export's Frozen Food Buyers Mission at AFFI-CON, taking place February 20-21, 2016, in San Diego, California. Visit our website to register today!



FOOD EXPORT–MIDWEST AND FOOD EXPORT–NORTHEAST ACTIVITIES

Branded Program: Did you know that you might be eligible for up to 50% reimbursement on travel and exhibition fees for some of these activities? Visit www.foodexport.org for more information.

BUYERS MISSIONS

Buyers Missions bring buyers from all over the globe to U.S. cities. U.S. food and beverage suppliers meet one-on-one with pre-qualified, international buyers to generate sales leads. Imagine meeting with numerous buyers from multiple countries all in one day.

Specialty Food Buyers Mission at the Winter Fancy Food Show

January 16-18, 2016, San Francisco, California
Registration Deadline: December 4, 2015 - \$225

2016 Northeast Buyers Mission

January 25, Boston, Massachusetts
January 27, New York, New York
January 28, Philadelphia, Pennsylvania
Early Registration Deadline: November 20, 2015 - \$250
Registration Deadline: December 11, 2015 - \$300

Value-Added Feed Ingredients Buyers Mission at the International Production & Processing Expo

January 27, 2016, Atlanta, Georgia
Early Registration Deadline: November 20, 2015 - \$150
Registration Deadline: December 14, 2015 - \$225

Frozen Food Buyers Mission at AFFI-CON

February 20-21, 2016, San Diego, California
Registration Deadline: January 8, 2016*

*Suppliers must be AFFI-CON 2016 registered attendees to participate in this Buyers Mission. This activity is no-cost for attendees.

FOCUSED TRADE MISSIONS

Focused Trade Missions bring small groups of U.S. suppliers to a country with the goal of building participants' export businesses. You're able to see the market dynamics first-hand, meet and build relationships with interested importers, and discover your products' potential in that market.

Focused Trade Mission to Canada for Retail, Food Service and Ethnic Products

February 16-18, 2016, Vancouver, Canada
Registration Deadline: December 1, 2015 - \$600

Focused Trade Mission to Chile for Sweets and Snacks Products

February 29 - March 1, 2016, Santiago, Chile
Registration Deadline: December 9, 2015 - \$600

Focused Trade Mission to Colombia for Sweets and Snacks Products

March 2-4, 2016, Bogota, Colombia
Registration Deadline: December 9, 2015 - \$600

Focused Trade Mission to India for Retail and Food Service Products

March 7-11, 2016, New Delhi & Mumbai, India
Registration Deadline: December 14, 2015 - \$600

FOOD SHOW PLUS!™

Food Show PLUS!™ provides the logistical assistance you need to be a more effective exhibitor. Services may include registration assistance, pre-show product research, translations of booth and sales materials, technical interpreters at your booth, local industry tours, on-site show assistance from food marketing experts, and much more!

Food Show PLUS!™ at Gulfood

February 20-25, 2016, Dubai, UAE
Registration Deadline: November 27, 2015 - \$350

Food Show PLUS!™ at Int'l Food and Beverage Exhibition (FOODEX)

March 7-11, 2016, Tokyo, Japan
Early Registration Deadline: November 20, 2015 - \$250
Registration Deadline: December 14, 2015 - \$350

Food Show PLUS!™ at ANTAD

March 14-18, 2016, Guadalajara, Mexico
Early Registration Deadline: November 23, 2015 - \$225
Registration Deadline: December 21, 2015 - \$350

Food Show PLUS!™ at Food & Hotel Asia

April 11-15, 2016, Singapore
Registration Deadline: December 21, 2015 - \$225
Early Registration Deadline: January 19, 2016 - \$350

FIND EXPORT SUCCESS. CALL US. WE'RE HERE TO HELP.

Visit www.foodexport.org to get complete details and register online. Or call your Food Export Liaison to answer any questions.

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Please note: Dates and locations are subject to change and upcoming activities are pending funding from the Foreign Agricultural Service (FAS) of the USDA. Visit our website for more event information.

PROGRAMS AND SERVICES THAT DRIVE RESULTS.

Our programs are designed to work together to help you achieve export success. They focus on educating you about the benefits of exporting, helping you explore and enter new markets and remaining successful and competitive once in the market.



Make your market.SM



EXPORTER EDUCATION

Start Here and Become Export Ready!

Learn the Why's and How's of exporting. See what export opportunities may be waiting for you. The right education and preparation can definitely enhance your exporting readiness and produce results!

FOODEXPORT HELPLINE™

ONE-TO-ONE ANSWERS

Get answers tailored to your company, products and export markets. Food Export Helpline™ is a complimentary service that provides one-on-one assistance on many export-related topics, with customized export advice specifically for you.

EXPORTESSENTIALS ONLINE

ON-DEMAND KNOW HOW

Stop by foodexport.org and find a wealth of information under "Export Essentials"—an educational introduction to the fundamentals of exporting. Each section provides detailed information to answer your questions about exporting.

GLOBALFOOD MARKETER™

NEWSLETTER • E-NEWS

Read export news specifically for U.S. companies in the Midwest and Northeast. Our bi-monthly newsletter also covers hot markets, trends and profiles of companies successfully exporting. Visit foodexport.org to sign up for your free subscription.

SEMINARS+ WEBINARS

INDUSTRY KNOWLEDGE BANK

Take one of Food Export's hands-on seminars throughout the year at many locations on important export topics. Webinars are complimentary and offer a convenient way to learn the why and how of exporting.



MARKET ENTRY

Explore Markets and Promote Your Products!

Become confidently armed with exporting intelligence. Now you're ready to explore markets and meet with buyers!

MARKETBUILDER

INDUSTRY INSIGHTS • MARKET INTELLIGENCE

Get our MarketScan which includes customized competitive overview, importation analysis, referrals and importer list. The RepFinder also includes in-market assistance appointments with targeted importers. Use one component or get the Market Builder package and save!

FOODSHOW PLUS!™

INTERNATIONAL TRADESHOW SUCCESS

Become a more confident international exhibitor with our tradeshow enhancement package. Food Show PLUS!™ can maximize your tradeshow success with: pre-show product research, material translation, in-market briefings, lead generation and more.

ONLINEPRODUCT CATALOG

24-7 ONLINE EXPOSURE

Upload your product information and photos into this virtual directory and get 24-7-365 exposure and attract more international buyers. It's simple to use and the best part—offered at no charge!

BUYERSMISSIONS

INTERNATIONAL BUYERS • HERE AT HOME

Meet international buyers and promote your products without leaving the U.S. Our buyers are pre-screened, qualified and interested in U.S. products from the Midwest and Northeast.

FOCUSED TRADEMISSIONS

TOTAL MARKET IMMERSION

Experience total market immersion for your product and brand. Travel and explore a market. There's no better way to understand the local food industry landscape, assess the competition and learn about the promotion of your products.

EXPORTADVISOR PROGRAM

CUSTOMIZED CONSULTING

The Export Advisor Program is a year-long service which provides custom assistance from an experienced advisor to help your company kick start or improve your exporting efforts.



MARKET PROMOTION

Become a Global Brand!

Remain Competitive Internationally. Food Export offers reimbursement for a wide variety of international marketing activities.

BRANDEDPROGRAM

50% MORE INTERNATIONAL MARKETING

Enroll in Food Export's 50% cost-share reimbursement program and learn how you can make the most of your marketing budget. Qualifying companies can make their promotional efforts go even further. Get your brand out there. Eligible international marketing expenses include in-store promotions and demonstrations, promotional and point-of-sale materials, advertising, electronic marketing, international tradeshow and more!

FIND EXPORT SUCCESS. CALL OR EMAIL US. WE'RE HERE TO HELP.

Call: (312) 334-9200 or (215) 829-9111 | E-mail: info@foodexport.org | Visit: www.foodexport.org

Food Export-Midwest and Food Export-Northeast administer many services through Market Access Program (MAP) funding from the Foreign Agricultural Service (FAS) of the USDA. Persons with disabilities who require alternate means of communication of program information should contact us. Food Export -Midwest and Food Export-Northeast do not tolerate fraud and are vigilant in preventing fraud in any of our programs. Food Export does not discriminate, and we reserve the sole right to accept or deny companies into our programs. For complete participation policies and our code of ethics, visit: www.foodexport.org/termsandconditions.

FOOD EXPORT HELPLINE™: COLOMBIA

Q: A group of employees at my company attended the webinar on “Destination Colombia: A Growing Market for U.S. Foods.” We learned a lot but are interested in researching the market further. We produce non-dairy yogurt flavored soft drinks and were approached by two importers from Colombia at a recent tradeshow. We wonder if you could fill us in a little more, especially on the product specific export data, the product registration process, the Free Trade Agreement and duties and taxes.

A: It was an appropriate title for the webinar to be sure and was well done. We hope that webinars, like all educational offerings, are a first step to further education and research. U.S. foods have become increasingly popular in Colombia even prior to the Colombian Trade Promotion Agreement, or CTPA, entering into force. It is a Free Trade Agreement (FTA) with a slightly modernized title. Your questions are quite common and necessary to understand the market, so let’s see if we can supplement that understanding more here.

U.S. EXPORTS OF AGRICULTURAL PRODUCTS TO COLOMBIA

Many suppliers are not aware that Colombia became the 10th largest market for U.S. agricultural products in 2014. Exports totaled \$2.4 billion, which ranked it higher than Vietnam, Germany, Turkey, UK, Thailand, Australia, and Brazil, for example. In 2011 prior to the CTPA, Colombia ranked 24th as a market. The 2010-2014 growth rates were 195%, which was the highest in the top 49 U.S. export markets. From 2012, when the CTPA was entered into force, through 2014 the growth rate for U.S. agricultural exports was 62%, which was also the highest in the top 49 markets. It is clear, exports ramped up in advance of the CTPA and have grown since. Through May 2015, U.S. exports to Colombia have increased 2% on a year to date (YTD) basis and they now rank 9th overall at \$1.2 billion, at a time when many of their regional neighbors are in decline to varying degrees. This is all extremely positive news.

The U.S. is the largest supplier of food and agricultural products to Colombia and it is the largest market for U.S. agricultural products in Latin America after Mexico. Of the 2014 U.S. export total of \$2.4 billion, \$580.7 million was consumer oriented, a new record high and an increase of 38%. That is about a 41% market share of imported agricultural products. The top categories of U.S. consumer food exports included pork and pork products, prepared foods, dairy products, poultry meat, fresh fruit, processed vegetables, non-alcoholic beverages (such as yours), chocolates, tree nuts, and snack foods.

PRODUCT REGISTRATION

Once in negotiations with a potential import partner in Colombia, the product registration process must be completed. This is mandatory to allow the products into the country. This is administered by Colombia’s INVIMA. All processed retail food items, including products imported in bulk for repackaging for retail use without further processing, must be registered and approved by INVIMA.

INVIMA reports product registration is not required for: products that are not subject to any transformation, such as grains, fruits, fresh vegetables, honey, etc.; products of animal origin not subject to any transformation process; products used as raw materials by the food industry or Hotel-Restaurant-Institutional (HRI) sector in food preparation. A transformed product is defined by the GOC as having been subjected to processing that resulted in a change in its internal structure.

The INVIMA registration is only for the applicant (exporter or importer) and the specified manufacturer. Whenever the U.S. exporter wants to change its Colombian importer, there are two approaches: If the U.S. exporter is the applicant for the INVIMA registration, they must submit an application for registration modification to INVIMA; if the Colombian importer is the applicant, the U.S. exporter must initiate a new registration process, specifying the new importer(s). Afterward, the U.S. exporter may change the importer(s) whenever necessary. It is recommended that the U.S. exporter conduct the registration process and changes through a legal representative in Colombia.

The INVIMA registration is valid only for the specifications (e.g., product description and size) mentioned in the registration. If another form or presentation of the same product is to be imported, the registering company needs to inform INVIMA in writing of the new product.

The INVIMA registration of processed foods requires: (1) completing the registration form; (2) obtaining a Certificate of Legal Representation; and, (3) obtaining a Certificate of Free Sale, COFS, stating that the products are approved for human consumption in the U.S. The COFS needs to be issued by a U.S. government (state, local or federal) public health authority. In some states the Department of Agriculture issues the COFS and in others it is the State Department of Health or a like organization. Other designated agencies can issue a COFS but since it is food it is best done by the agency that inspects the manufacturing plant process on an annual basis. The Certificate of Legal Representation can be produced by the exporter in a brief signed and stamped statement indicating the buyer has the authority to distribute the products within the market.

Although not required, the INVIMA registration can be expedited if a description of the manufacturing process and a list of the ingredients is submitted, including any additives, preservatives, and colorings/dyes. The above listed documents must carry an “Apostille” stamp. The “Apostille” stamp is produced by different U.S. state authorities,



including a notary or a State Secretary. The fee ranges but is usually \$10 to \$15. A translator approved by the Ministry of Foreign Affairs must translate these documents into Spanish.

For further details on Food and Agricultural Import Regulations and Standards (FAIRS), please read the Foreign Agricultural Service (FAS) Global Agricultural Information Network or "GAIN" report on the subject on www.fas.usda.gov under "Data and Analysis."

THE CTPA, DUTIES & TAXES

There are a few simple steps to analyzing the duties and taxes on food products in Colombia as well as qualifying your product for the CTPA. These were pointed out prior to the Q&A in the webinar and are in your handout. Although information on this and other trade agreements is available through a number of individual websites, the platform with the most coverage and links to many individual sites is located at www.export.gov.

The Harmonized System, HS, code for your yogurt flavored beverages is 220290. To check on the tariff elimination schedule you click on "What's My Tariff" and then type in the destination and the HS code. Note that the tariff is in Spanish, like many others in the region. It does say "Non-alcoholic Beverages Nesoi" which means "Not elsewhere specified or included." You do not have fruit juice or milk as ingredients which have their own specific codes. Duties on products under your code were eliminated when the CTPA entered into force May 2012. That is if they actually qualify for the agreement according to the specific rules of origin for the code.

The rules of origin appear at the bottom of the page. There are a few that pertain to the fruit juice and milk ingredients which are somewhat strict, as most agreements are. Since you have neither, your rule is at the bottom and says "A change to all other goods of subheading 2202.90 from any other chapter." You should always know the country of origin of your ingredients whether you imported them directly or not in order to fulfill FTA and TPA obligations. This says that as long as your ingredients were not already a prepared

beverage upon import, the product qualifies for the CTPA. If all the ingredients are from the U.S. it qualifies easily but that is not likely with multiple ingredients such as yours.

As far as documenting origin goes, like many of the more recent trade agreements you will see that there is no official certificate of origin requirement as the importer is the one responsible for declaring the products qualify for preferential tariff treatment under the agreement. However there is a basic template for creating a certificate on your own letterhead if the buyer requests that to present to Colombian customs.

Notice the page also refers you by hotlink to USDA's "Agricultural Tariff Tracker" which is located also at www.fas.usda.gov. This database has the tariff elimination schedule in it but also has detailed information on food product aggregates as well as tariff rate quotas and safeguard measures for specific products. It does not have the rules of origin in it but has a links page to nearly all of the important websites on FTAs and TPAs. Neither database has the taxes included in them as they are focused only on the duty in the agreement.

You can click on "Rules of Origin" and then on "Customs Info Database." Create an email account for this free service. Then select Colombia and type in the HS code of 220290. The product description and the full tariff extension come up as well as an icon of dollars and sense. Click on that and then on "calculate" and the tariff treatment for the product comes up. It indicates the duty would be 15% on the product if it did not qualify for the TPA. If it does, it indicates it is free from duty which we now know. It also mentions there is a VAT or Value Added Tax of 16%. There is no duty on the product so the importer needs to pay 16% of the Cost, Insurance and Freight, CIF price.

For further illustration please see the recorded webinar "Export Essentials: Free Trade Agreements: How to Track Tariff Reductions and Quotas" as well as "Export Essentials: Navigating Food Export Requirements" on www.foodexport.org.