



**PROCOLOMBIA**

EXPORTS TOURISM INVESTMENT COUNTRY BRAND

# Business Opportunities in Colombia







Major multinational corporations including  
japanese companies, have chosen Colombia  
as an investment project destination



# Trading Relationship between Colombia and Japan

Japanese investment on Colombia from 2010 – 2015 was US\$286 million. 17 times bigger when compared to 2004-2009 (US\$ 15,9 million)

Over 80 Japanese companies are present in Colombia

96,5% invested on non traditional exports

Japan is the No. 1 investor from Asia in Colombia.

The logo for CASTEM, featuring the word "CASTEM" in blue capital letters with a yellow starburst graphic to the right.The logo for FUJITSU, featuring the word "FUJITSU" in white capital letters on a red rectangular background.The logo for SMFG (Sumitomo Mitsui Financial Group), featuring a green stylized "S" shape to the left of the text "SMFG SUMITOMO MITSUI FINANCIAL GROUP" in black capital letters.The logo for FURUKAWA ELECTRIC GROUP, featuring a red stylized "A" shape to the left of the text "FURUKAWA ELECTRIC GROUP" in black capital letters.

# TABLE OF CONTENT

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# INFRASTRUCTURE AND LOGISTICS



# Sectors of opportunity – Infrastructure: A major driver for growth

Some niche opportunities:



Airports



Ports



Roads



Fluvial National  
plan



Step railways

- US\$ 900 million in improvements for 47 airports (2015 – 2018)
- US\$1.4 billion between 2015 and 2018 to improve ports infrastructure
- US\$ 17 billion to increase road infrastructure:
  - 7.000 Km of Highways
  - 1.400 Km of Double Lane Highways
  - 141 tunnels
  - 1.300 Viaducts
- US\$ 1.8 billion to improve the navigability of Magdalena river
- US\$ 53 million: More than 900 km railways under adjustments
- PPP law 1508 in force since 2012.



# Sectors of opportunity - Infrastructure: A major drive for growth

 **iridium**<sup>®</sup>

Spain

In 2014, Iridium awarded two road concession projects in the government's "highway concession program (4G)".

Those projects total 78Km.

**STRABAG**

Austria

Strabag will be in charge of 75 Km of new highways, the modernization of a 65 km section

 **SHIKUN & BINUI**  
ARISON GROUP  
Renewable Energy

Israel

Shikun & Binui awarded the project "Corredor Perimetral de Oriente de Cundinamarca = 153 km length "

 **HEC**

China

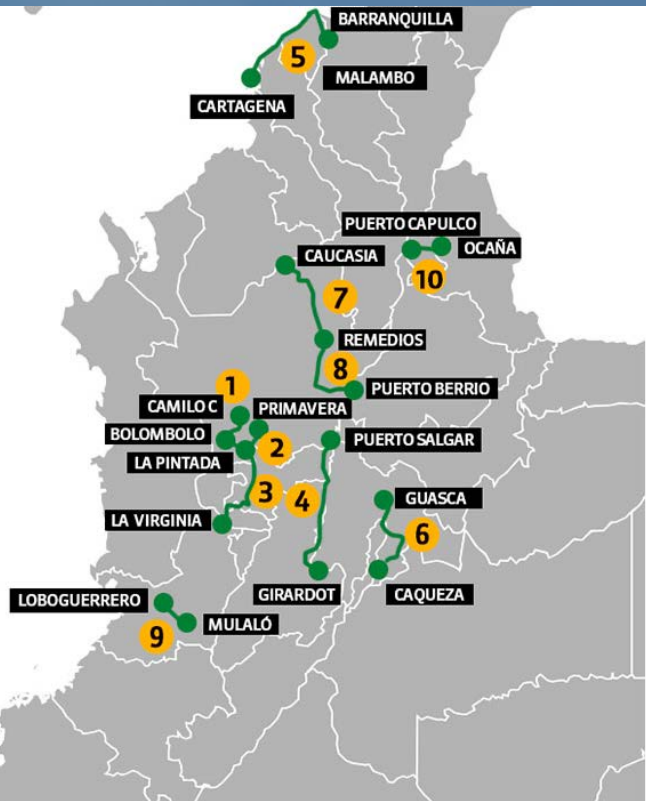
HEC will build "The mar 2 highway" that will improve the logistic development at the northeast region of the country. Total project length 246 km.



## Road Infrastructure



# First Wave



More than **US\$4,6 billion** In investment  
**10 Projects Awarded**

PROJECT	CURRENT STATE
PUERTA DE HIERRO – PALMAR DE VARELA Y CARRETO –CRUZ DEL VISO	Awarded on 19/05/2015
TRANSVERSAL DEL SISGA	Awarded on 28/05/2015
VILLAVICENCIO - YOPAL	Awarded on 02/06/2015
SANTANA – MOCOCHA – NEIVA	Awarded on 09/06/2015
SANTANDER DE QUILICHAO - POPAYÁN	Awarded on 16/06/2015
MAR 1: TÚNEL DE OCCIDENTE – SANTAFÉ DE ANTIOQUIA - BOLOMBOLO	Awarded on 30/06/2015
BUCARAMANGA – BARRANCABERMEJA – YONDÓ	Awarded on 06/07/2015
PASTO – RUMICHACA	Awarded on 24/07/2015
MAR 2: CAÑAS GORDAS – URAMITA – MUTATÁ – EL TIGRE – NECOCLÍ	Awarded on 21/09/2015
PUERTA DE HIERRO – PALMAR DE VARELA Y CARRETO –CRUZ DEL VISO	Awarded on 19/05/2015

**More than 1.100 km Involved**

Source:  
 ANI National Infrastructure Agency, March 2016  
 DNP Planning National Department, March, 2016



# Second Wave

PROYECTO	ESTADO
PUERTA DE HIERRO – PALMAR DE VARELA Y CARRETO –CRUZ DEL VISO	Awarded on 19/05/2015
TRANSVERSAL DEL SISGA	Awarded on 28/05/2015
VILLAVICENCIO - YOPAL	Awarded on 02/06/2015
SANTANA – MOCOA – NEIVA	Awarded on 09/06/2015
SANTANDER DE QUILICHAO - POPAYÁN	Awarded on 16/06/2015
MAR 1: TÚNEL DE OCCIDENTE – SANTAFÉ DE ANTIOQUIA - BOLOMBOLO	Awarded on 30/06/2015
BUCARAMANGA – BARRANCABERMEJA – YONDÓ	Awarded on 06/07/2015
PASTO – RUMICHACA	Awarded on 24/07/2015
MAR 2: CAÑAS GORDAS – URAMITA – MUTATÁ – EL TIGRE – NECOCLÍ	Awarded on 21/09/2015



More than 1.700 km Involved

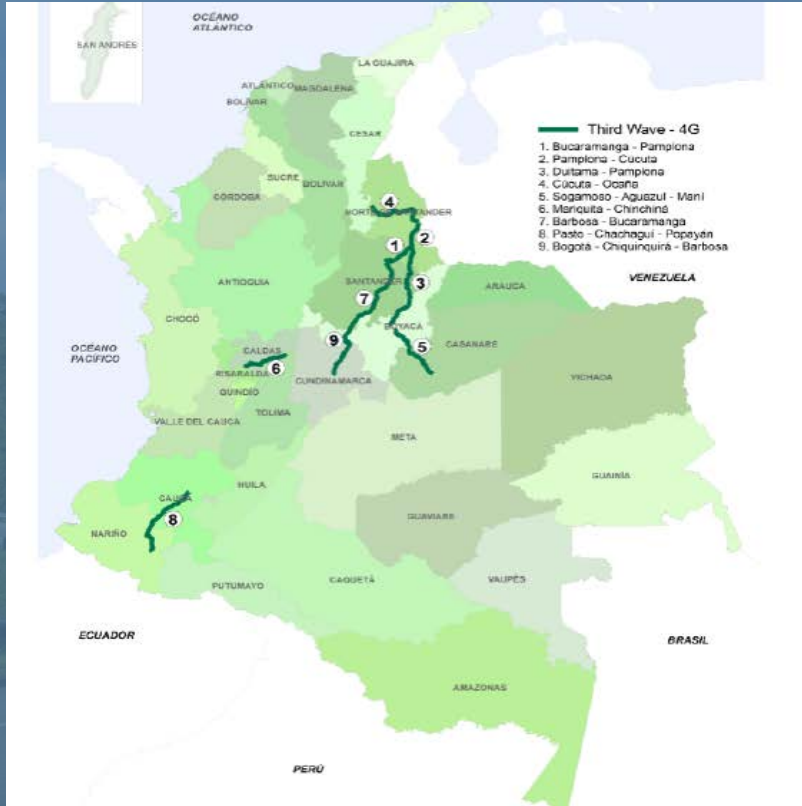
Source:  
ANI National Infrastructure Agency, March 2016  
DNP Planning National Department, March, 2016



More than **US\$4,7 billion** In investment

**9 Projects Awarded**

# Third Wave



## THIRD WAVE

### Fourth Generation Highways

**Investment**  
4,5  
USD Billions

**Execution**  
1.708  
KM

9 Proyectos

1. Bucaramanga – Pamplona
2. Pamplona-Cúcuta
3. Duitama – Pamplona
4. Cúcuta – Ocaña
5. Sogamoso-Aguazul-Maní
6. Mariquita-Chinchiná
7. Barbosa – Bucaramanga
8. Pasto-Chachagüí-Popayán
9. Bogotá – Chiquinquirá – Barbosa

**PPP Public Initiative**  
**2 Projects Awarded**





# Fourth Wave



## 9 PRIVATE INITIATIVES

### Fourth Generation Highways

Investment

USD\$3,2  
Billions

Execution

2.257  
Km

1. Ibagué – Cajamarca
2. Malla Vial del Meta
3. Chirajara – Villavicencio
4. Cambao – Manizales
5. Cesar – Guajira
6. Antioquia - Bolívar
7. Neiva - Girardot
8. Tercer Carril Bogotá – Girardot
9. Vía del Nus

PPP Private Initiative





**Railway Infrastructure**

# Phase 1: Existing railways are being repaired through a Public Initiative

## Dorada – Chiriguáná Corridor

**Awarded to:** Unión Temporal Ferroviaria Central.\*

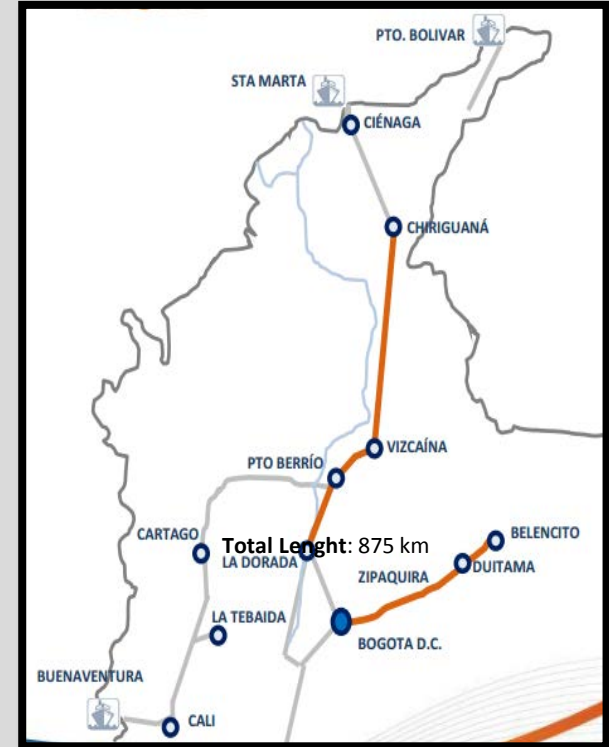
**Investment Cost:** US\$ 36,334,218

## Bogotá – Belencito Corridor

**Awarded to:** Dracol Líneas Férreas.

**Investment Cost:** US\$ 34,567,487

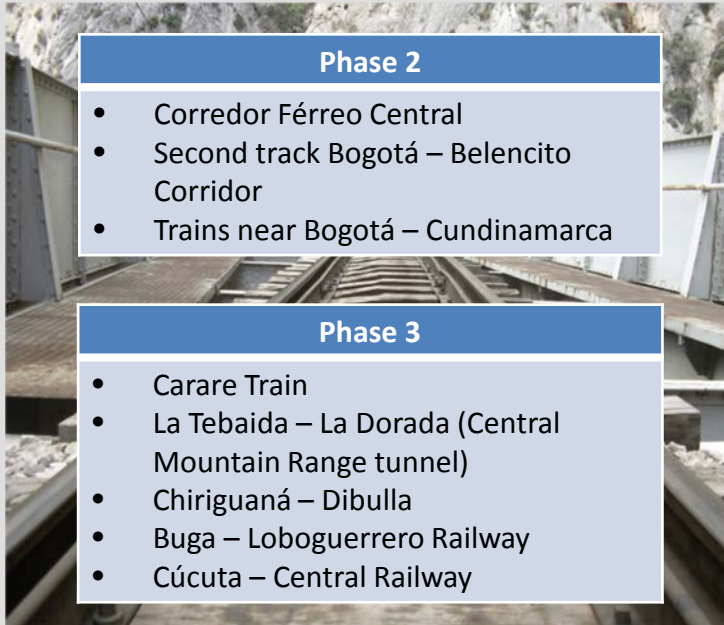
**Achievements:** Rehabilitation of the railway corridors between **Bogotá – Belencito** and **La Dorada – Chiriguáná**



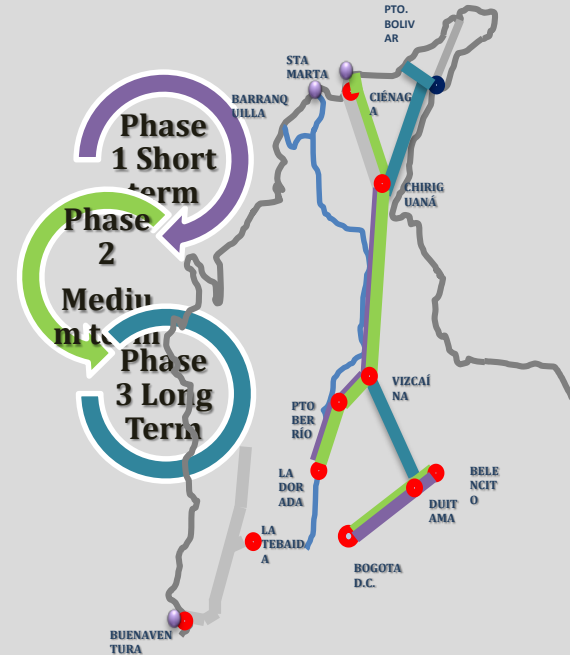
Source: National Infrastructure Agency–AN, 2015. TRM: \$2.500



# Once Phase 1 is completed, Phases 2 and 3 will begin through Private Initiatives



**Estimated Investment**  
US\$ 120 million annually





Llanos  
Orientales

# Project: Los Llanos Train



- ✓ Strategic project that covers the Apiay - Rubiales route. Also includes the construction of a railway provided with steel plates for oil transportation in trucks.
- ✓ The project developers plan to sign preliminary agreements with Pacific Rubiales to transport crude covering the same route.

**Investment\* : US120 Million**

PPP Private Initiative

PROCOLOMBIA CO

\*Estimated. \* TRM: US\$/COP: 3.000



Pacific Region

# Project: Train of the Pacific



- ✓ Project that seeks to connect through the central railway, local cargo from the Pacific Ocean to the Atlantic Ocean up to the ports located in the Caribbean.
- ✓ **SIZE:** 1.088 kilometers. More than 150 train cars and 10 train engines.
- ✓ **CAPACITY:** More than 30.000 tons per month.
- ✓ **PROJECT TIMING:** 30 years.
- ✓ **EXPECTED TIMELINE FOR INVESTMENT:** 6 years

**Investment\*:** US1.800 Million

PPP Private Initiative

PROCOLOMBIA CO

\*Estimated. \* TRM: US\$/COP: 3.000





Bogota

# Project: Bogota City Metro



- ✓ Previous Government: 2012 -2015: Underground subway studies
- ✓ New Government : 2016 – 2020  
Mayor Name: Enrique Peñalosa
- ✓ New Challenge: Design an elevated railway or at least some stages.
  - FDN National Finance Department will focus on the studies for an elevated railway.
  - August 2016: Expected date for the pre tender documentation.

## Investment\*: US\$9.7 Billion

PPP Public Initiative

**FDN National Finance Department** is the financial developments entity; that focuses on how local and international financial resources can be mobilized to guarantee the financial support of the infrastructure projects of Colombia.

\*Estimated. \* TRM: US\$/COP: 3.000

Source: FDN Financiera de Desarrollo Nacional June 2016



Medellin

## Project: Medellin City Tram Av. 80

The proposal includes a 136 km long rail network capable of transporting 1.8 m passengers a day.



- ✓ Project: City Tram
- ✓ Length: 13.5 Km
- ✓ Stations: 4 stations – 25 stops
- ✓ Passengers: 200,000 / day
- ✓ Investment (estimated\*): US\$ 833 M



## Investment\*: US\$833Million

PPP Public Initiative

PROCOLOMBIA CO

\*Estimated. \* TRM: US\$/COP: 3.000



Bogota

# Project: Bogota City Regio - Tram



- ✓ Project: Train-Tram electric train
- ✓ Length: 21.9 km 41.4 Km + 3.4 Km (to Airport)
- ✓ Passengers: 211.000/ year
- ✓ Wagons: More than 31 wagons
- ✓ Passengers can transfer from Regio Tram to Transmilenio
- ✓ Will transport passenger to the International Airport El Dorado



Investment\*: USD\$ 1.8 Billion

PPP Private Initiative



PROCOLOMBIA



\*Estimated. \* TRM: US\$/COP: 3.000





EL DORADO

# Airport Infrastructure



Bogota

## Project: New International Airport El Dorado II: Important for the tourism and productivity of the country



- ✓ Most important airport in Colombia.
- ✓ 3rd in Latin America in number of passengers after Sao Paulo and Mexico City.
- ✓ Connection center for the 3 major Latin American airlines: Avianca, LAN and Copa Airlines.
- ✓ 2 Runways of 4,000 mts.
- ✓ Area of 1,350 ha
- ✓ Will be located in the Municipality of Madrid, Cundinamarca.



**National Infrastructure Agency:**  
Will develop the geomorphological obstacles, field and operational studies.



**Civil Aviation:**  
Will develop technical studies.

**Investment\*: US\$1 Billion**

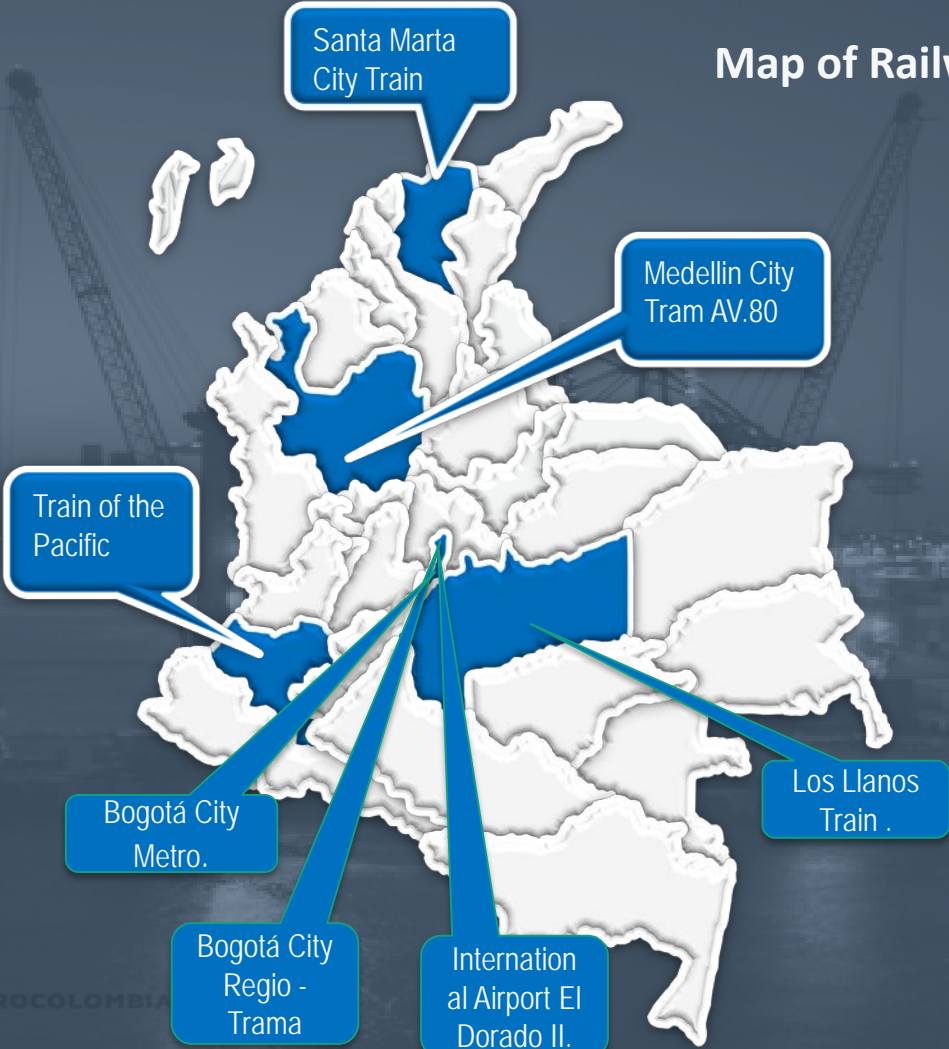
**Expected awarded date: 2018**

PPP Public Initiative

*Under technical studies*



# Map of Railway and Airport Infraestructure Projects





## Port Infrastructure





Ports

## Project: Ports along the Magdalena River



- ✓ Cormagdalena has received offers to build ports along the river. Some of most important concessions are:
  1. **Puerto Impala in Barrancabermeja:** with an investment of more than \$ 400 million usd and generates more than 1,900 direct jobs in this region.
  2. **Terminal Fluvial Andalucía:** in Gamarra, Cesar, another multipurpose port, will positively impact for the region of Magdalena Center.
- ✓ Cormagdalena has granted 43 port concessions and 26 in the department of Atlántico, 3 in Magdalena, 5 Santander, 4 in Bolivar, 3 in Cesar, 1 in Antioquia and 1 in Cundinamarca.

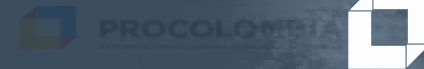
### Investment\*: US\$400 Million

PPP Private Initiative

If a company is interested in a port concession it should start an application for the grant in terms of the first law of 1991 - Decree 474 of 2015.

PROCOLOMBIA CO

\*Estimated. Source: Cormagdalena, February 2016





Ports

## Project: Puerto Antioquia

Maritime Port for Public use located in the Urabá Gulf in the department of Antioquia.



- ✓ PIO SAS (Puertos, Inversiones y Obras SAS) is the company that will construct the port.
- ✓ Located in Bahía Colombia, Golfo de Urabá, Atlantic Coast, near Nueva Colonia, next to the Leon River (Río León), City of Turbo, Antioquia Department.
- ✓ Located 340 km from Medellín and 28 km from Turbo.

**Investment\* : US\$400 Million**

PPP Private Initiative

Interest for a logistic operator or investor





Ports

## Project: Darien International Port

It is a multipurpose port located in Urabá Gulf in the Department of Antioquia. The marine terminal will have the capacity to handle containers, bulk cargo, dry bulk and liquid cargo.



- ✓ Concreto is the company that will construct the port.
- ✓ Construction will start during the second semester of 2016.
- ✓ Located in Necolí, Urabá.
- ✓ 380 km from Medellín, 820 km from Bogotá and 574 km from Manizales, Pereira and Armenia.

## Investment\*: US\$1 Billion

PPP Private Initiative

Interest for a logistic operator or investor





Ports

## Project: Deep Water Port in Barranquilla



- ✓ Located in Barranquilla, its expected to be the largest multipurpose deep water port in Colombia. Able to handle cape size vessels, adjacent to large industrial and logistic hub and access to Magdalena River, connecting the coast with mayor consumption and production centers.
- ✓ Barranquilla and the SPBC Sociedad Portuaria de Barranquilla project have ample land availability.
- ✓ Once fully developed, SPBC will have 11 docking positions with over 3.800 m of quay and more than 145 Ha in storage capacity.
- ✓ Ability to play a role in the Caribbean transshipment market

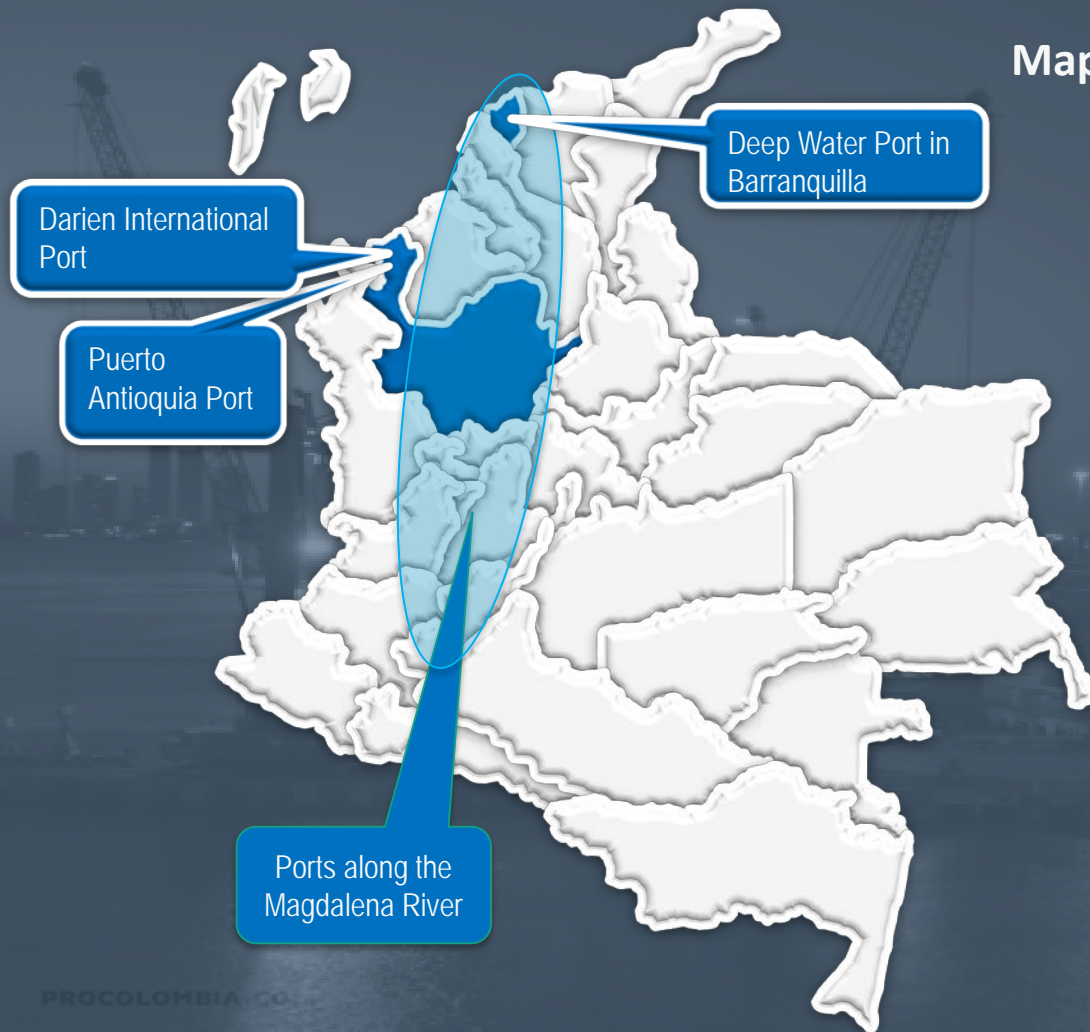
**Investment\* : US\$876 Billion**

PPP Private Initiative

- ✓ Currently valid until January 19, 2055.
- ✓ Has environmental license.



# Map of Ports Infrastructure Projects



# ENERGY



**PROCOLOMBIA**  
EXPORTACIONES TURISMO INVERSIÓN MARCA PAÍS

# Sectors of opportunity – Energy: a diversified source base and a pivotal location in the Americas

Colombia was ranked **first in Latin America and seventh in the world** according to the “Energy Architecture Performance Index 2014”. WEF, 2014.

**103** Power Generation projects in different stages: Installed capacity of **4,974 MW\***

**13** power transmission projects in different stages\*

High potential in Biofuels and alternative energies

Some niche opportunities



Wind

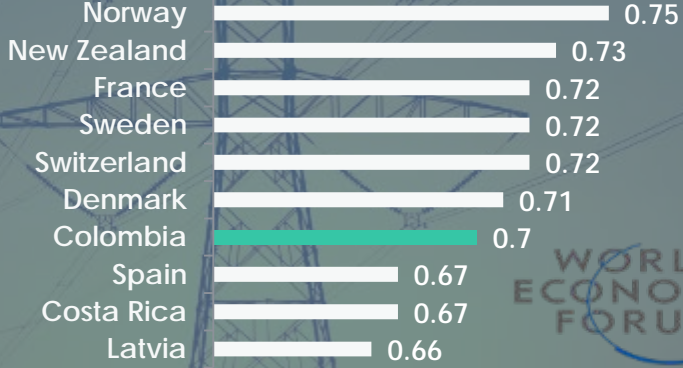


Solar



Geothermal

## The Global Energy Architecture Performance Index 2014



Source: World Economic Forum 2014 and UPME / \* UPME (Colombian Planning Unit of Mines and Energy). MW approx.



# Sectors of opportunity - Energy: A diversified source base and a pivotal location in the Americas

**endesa**

Spain

Endesa, the subsidiary of the Italian group Enel, acquired participation in Emgesa and Betania power generation companies with 2,895 MW of installed capacity.

 **UNION FENOSA**

Spain

Union Fenosa bought " Electricaribe and Electrocosta " and became the main power distribution and trading company in the North coast of Colombia.

 **AES**

United States

Colombia subsidiary of AES Corporation (Applied Energy Services). Chivor is one of the country's largest generator with a total effective installed capacity of 1,000 MW.

**steag**

Germany

The low-grade coal-fired power plant Termopaipa in Paipa (Colombia) was the first power plant abroad which was planned, financed and built by Steag.





## Structuring Company: Taller Empresarial

### Project Name: Small Hidroelectric Power Plants

- ✓ **Hydroelectric Plant:** Water from Antioquia, Valle del Cauca and Caldas Department rivers.
- ✓ **Type:** Run-of-river
- ✓ **Location:** Antioquia, Valle del Cauca and Caldas Department.

- ✓ **Total Capacity:** 112 MW
- ✓ **Expected Date to start Operation:** Full operation in 2017 and 2018 (65.68 MW), leaving only (19.9 MW) and 18.56 MW to enter into operation in 2019.
- ✓ **Total Investment:** 300 USD Million

The resources obtained will be used by the Developer to build seven (7) hydroelectric power plants or set of them with a total capacity of 112 MW to be installed in the Departments of Antioquia, Caldas and Valle del Cauca (Colombia).





# Structuring Company: Enerco

## Project Name: Small Hydroelectric Puente Guillermo

- ✓ **Hydroelectric Plant:** Water from the river Suarez
- ✓ **Type:** Run-of-river
- ✓ **Location:** Santander Department.

- ✓ **Total Capacity:** 4.6 MW
- ✓ **Total Investment:** 5.000.000 USD Million

The hydroelectric is already working but Enerco is interested in selling 100 % or a certain percentage of the project.





**Structuring Company:** Hidroarma

**Project Name:** Small Hydroelectric Plants Encimadas and Cañaverál

- ✓ **2 Hydroelectric Plant:** Water from the river Arma
- ✓ **Type:** Run-of--river
- ✓ **Location:** Between Antioquia and Caldas Department.

- ✓ **Total Capacity:** 174 MW (94 MW – 80 MW)
- ✓ **Expected Construction Time:** 45 months each project.
- ✓ **Total Investment:** 318 USD Million

Projects are currently owned by Hidroeléctricas del Rio Arma (“Hidroarma”). The Company is controlled by the Instituto para el Desarrollo de Antioquia (the “IDEA”), a public entity depending on the local Government of Antioquia with experience in the development and concessions of large infrastructure works.





**Structuring Company:** Camargo Correa and Generadora Union

**Project Name:** Small Hydroelectric AMBEIMA and CHILI

- ✓ **2 Hydroelectric Plant:** Water from the river Ambeima and Chili in the Tolima Department.
- ✓ **Type:** Run-of-river
- ✓ **Location:** Tolima Department.

- ✓ **Total Capacity:** 46 MW and 66 MW
- ✓ **Expected Construction Time:** 45 months – 45 months each one.
- ✓ **Total Investment:**
  - Ambeima 150 USD Million
  - Chili 220 USD Million

The projects is the construction of 2 hydroelectrics in the Tolima Department. The Brazilian company Camargo Correa and the Colombian company Generadora Union are the structuring companies of these 2 small hydroelectric plants.





## Structuring Company: De Brom Colombia

### Project Name: Punta Gallinas

- ✓ **Wind Park:** of 120 turbines
- ✓ **Type of Contract:** Construction, operation and maintenance of a wind park
- ✓ **Location:** La Guajira Department.

- ✓ **Total Capacity:** 300 MW
- ✓ **Expected Construction Time:** First Semester of 2018
- ✓ **Total Investment:** 490 USD Million

The wind park will consist of 120 wind turbines Gamesa G114 , 2.5 MW.  
0.10 U\$D will be the price per Kilowatt generation for the first year of commercial sales , with a pre agreement increase of 1.5 % per year in nominal terms included in the PPA (Power Purchase Agreement).



## Structuring Company : Colgeolica

### Project Name: El Ahumado

- ✓ **Type of Contract:** Construction, operation and maintenance of a wind park
- ✓ **Location:** La Guajira Department.

- ✓ **Total Capacity:** 100 MW
- ✓ **Expected Construction Time:**
- ✓ **Total Investment:** US\$ 200 Million

Viability to deliver energy through a substation located 19 kms from the wind park.  
Main road within the area of the project which ease transportation of machinery.



# Structuring Company: Taller Empresarial

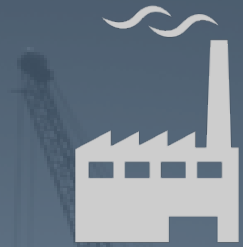
## Project Name: Biogas Doña Juana

- ✓ **Type:** The project uses the landfill gas produced in Bogota's landfill, Doña Juana, in order to produce Certified Emission Reductions (CERs or Carbon Credits) and simultaneously produce electricity.
- ✓ **Location:** Boyacá Department

- ✓ **Total Capacity:**
  - ☐ Power Plant I of 1.7 MW
  - ☐ Power Plant II of 9.9 MW
  - ☐ Power Plant III of 9.9 MW
- ✓ Total Investment: 15 USD Millon

The project is already working, but the structuring company is interested in selling the 100% of the project (15 USD million) or to sell a certain percentage. The project can include other landfills sale for 3 USD million in Cartagena, Monteria, Armenia and Tunja Departments.





# Structuring Company: Innercol

## Project Name: Innercol I

- ✓ **Type:** The Company is developing a Termoelectric Power Plant and will include pulverised coal technology.
- ✓ **Location:** Boyacá Department

- ✓ **Total Capacity:** 90 MW
- ✓ **Expected Date to start:** 2018.

Investment\*: 3.5 USD Million

\*Estimated. \* TRM: US\$/COP: 3.000





# Structuring Company: AEM

## Project Name: La Estrella

### Type:

- ✓ The company is developing a Coal-fired Power plant that will include the building of a 300 Mw (first estimation) coal fired mine-mouth.
- ✓ The company is owner of the coal mines concessions where the power plant will be located with 92,8 million tonnes in estimated resources (6,1M. proven).
- ✓ **Location:** Santander Department

- ✓ **Total Capacity:** 300 MW
- ✓ **Total Investment:** 531 USD Million

**Investment\* : USD 531 MM.**

**Revenue estimated: US 4,16 Billion.**

# AGRIBUSINESS



# Sectors of opportunity

# Agribusiness

## Some niche opportunities



Aquaculture



Cocoa



Cereals



Fruits and  
vegetables



Meat



Processed food



Rubber



Biofuels



Forestry

## Investment Opportunities

- Colombia is the 2<sup>nd</sup> largest flowers exporter worldwide, with around U\$1.285 million
- Colombia is the 3<sup>th</sup> largest coffee producer worldwide and the 2<sup>nd</sup> of Latin America.
- Colombia is the 4<sup>th</sup> largest producer of palm oil over the world, with around 1 million tonnes.
- Colombia has one of the largest biodiversity by km<sup>2</sup> in the world.
- In 2018, there will be one million more hectares due to "Colombia Siembra Plan"



# Sectors of opportunity

# Agribusiness



United States

Dole invested US\$ 15 million in a salad plant and a distribution center



Ireland

Smurfit Kappa is the larger provider of corrugated paper in Colombia.

They will invest US\$ 60 million in a new plant in Tocancipa



France

Established in 2007 as a result of a joint venture with the Colombian company Alquería.







Fruits and  
vegetables

**Project:** Plant 5,000 hectares in total of Persian Lime 31 miles southwest of Medellin starting with 820 hectares. The sale of the produce will be held in Colombia and abroad through trading companies that have already expressed interest in purchasing the product.

- ✓ Persian Limes harvest in Colombia do not have phytosanitary restriction or quarantine treatment when entering the USA and EU markets.
- ✓ Great opportunity in the local market due to climatic irregularities in typical harvested areas (Tolima and Santander).
- ✓ The next stage involves planting 820 acres of Persian Limes with the landowners already committed to contribute the land for its use in the project.
- ✓ Social Impact: Employ women of the countryside and build daycare facilities to assure a safe and fun place for the children while the mothers work.
- ✓ Connect with another projects which aims to legalize and give jobs to more than 800 illegal miners.

**Investment: US\$22 Million**

(5,000 acres)

**1<sup>st</sup> Stage Investment:** US\$ 3.3 million  
Investor IRR: 26%





Processed food

## Project: Fund and scale Lyotropic's business to reach international markets.

- ✓ Lyotropic SAS main brand LA FRUTA DICE, is a healthy snack consisting on freeze dried and cold press bites made out of exotic fruits such as pineapple, strawberry, golden berry, among others.
- ✓ Established in 2014, sales on its different channels started on June 2015.
- ✓ Its main objective is to share experiences through healthy, fun appropriate, different and inspiring products.

Investment: US\$ 1,3 Million



Processed food

## **Project:** Investment in the company, in order to increase production and strengthen the supply chain

- ✓ The products they offer are a unique mix of seeds, cereals, exotic fruits with high levels of vitamins, minerals and Omega 3.
- ✓ Company dedicated to develop, produce and sell high end healthy snacks.
- ✓ The products target customers that try to maintain a healthy lifestyle through a nutritionally balanced diet.

Investment: US\$2 Million



# MANUFACTURING



# Some key facts about Manufacturing in Colombia

manufacturing for the local and foreign markets

## Some niche opportunities:



Fertilizers



Plastic Packaging



Natural ingredients for cosmetics



Pesticides



Automotive



Ceramics



Metalworking



Architectural glass

- 3<sup>rd</sup> largest labor force in Latin America.
- 2<sup>nd</sup> in the region for competitive industrial labor (US\$1.6/hour)
- 0% import tariff relief for key industrial inputs
- 75% indirect financial support for Innovation and R+D+i projects
- 102 Free Trade Zones with 15% corporate tax
- Colombia is 40% more competitive and 60% faster than many ports in the Americas



# A regional platform for manufacturing activities with high standards of productivity

The logo for ABB, consisting of the letters 'ABB' in a bold, white, sans-serif font.

Switzerland

Its factory in Colombia is listed as one of the 'flagship factories' in the group, which has operations in more than 130 countries.



Unilever

Netherlands & United Kingdom

The new factory is one of its three most modern factories in the world, due to its modern approach and care for the environment.

The FOTON logo, featuring a stylized white 'V' shape above the word 'FOTON' in a bold, white, sans-serif font.

China

Foton invested more than US\$12 million in its new assembly plant for its SUV and 4x4 models

The Whirlpool logo, featuring a stylized white swirl above the word 'Whirlpool' in a white, serif font.

United States

Whirlpool had a joint venture with Haceb to produce washing machines.

Manufacturing plant: US\$ 70 million

# SERVICES



# Sectors of opportunity - Services IT, BPO, ITO, Shared Services, Apps

## Some niche opportunities



Cloud  
computing



Software  
development



Big data



Innovation and  
development  
centers



Aggregated shared services  
centers for diverse industries

Colombia is one **the three major providers** of IT services in the region.

- **The broadband connections increased** from 2.2 to 10.1 million between 2010 and 2015.
- In the next 4 years, **broadband connections will be triple** reaching 27 million connections.
- **Available labor force of more than 1,200,000 professionals** graduated in fields related to financial and value added shared service operations.
- VAT exemption for service exports.



# Sectors of opportunity - Services IT, BPO, ITO, Shared Services, Apps



United States

IBM opened its third Data Center in Colombia offering a processing power of 5 petabytes.

It's one of the most advanced centers for Cloud Computing and Big Data Analytics companies in the country.



Spain

Its BPO operation currently has more than 1,400 credit processes, customer service, and document management active positions.



DIRECTV  
United States

AT&T acquired DirecTV Colombia and it'll increase the telecoms offer Colombia through new services and packages.

UNISONO

Spain

It has two operations centers in Bogota where it manages a diversified portfolio of blue ribbon clients, with the capacity for up to a thousand positions.





# Sectors of opportunity – Real Estate

## Tourism Infrastructure, mixed projects

### Some niche opportunities



Nature & Adventure



Wellness

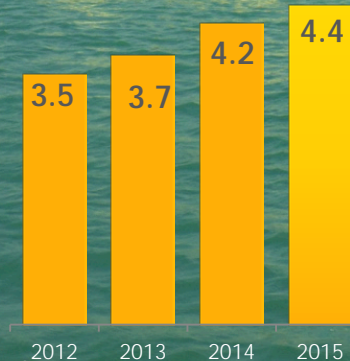


Entertainment



City Hotels

Inbound tourists\*  
2012 – 2015  
(million of people)



\*Inbound tourist includes: resident Colombians abroad, foreign non resident in Colombia, special cross borders, and cruise visitors.

Source: Migration Colombia and MinCIT. ProColombia calculations.

### Investment Opportunities in:

- Colombia ranks 25th in the ICCA ranking (International Congress and Convention Association)
- Luxury and wellness hotels can take advantage of the Colombian biodiversity to offer high quality services.
- Corporate Tax Exemption for hotels with more than 65% of their building by December 2017
- VAT exemption for health tourism services





# Sectors of opportunity

## Tourism infrastructure



United States

This American chain has 15 hotels in Colombia with more than 1,850 rooms



United Kingdom

Holiday Inn hotels opened in Bogota and Cartagena, totaling 331 rooms.



Spain

NH Hotels has 15 hotels in Colombia, with more than 1,600 rooms



Canada

This luxury chain has 2 hotels in Bogota with 126 rooms in the more exclusive locations in the city





# Name of the project: La Caracola

## Location: Santa Marta, Magdalena – Colombia

**Overview** : 100 junior suites , 80 suites, 70 villas, 10 villas plus, 4 restaurants, 4 bars, 2 pools, conference room, fitness center, heliport and Spa.

**Estimated investment:** US 40 – 50 million

- Grupo Argos and Múltiplo de 5 are looking for an investor that could commit the capital for the construction and maintenance of the hotel and villas.

### **Operation by Banyan Tree**

Developer and operator of high-end hotels, spas and premium resorts. Currently operates more than 36 hotels and resorts + 3 golf courses. Presence in China, Indonesia, Korea, Mexico, Vietnam, Thailand and UAE, among others.





SOCIEDAD HOTELERA  
TEQUENDAMA

# Name of the project: Hotel & Suites Tequendama

## Location: Bogota



**Overview** : 2 hotels in Bogota 573 rooms, 250 apartments,  
39 meeting rooms.

- Target: Corporate
- Average rate of COP \$ 290,000
- Market 65 % domestic - 35 % foreign.

### **Estimated investment:**

Sociedad Hotelera Tequendama is looking for **Franchise, operation and 10% sale of shares.**

It will require a minimum of participation to the franchise corresponding to 10% of daily occupation.

### **About Sociedad Hotelera Tequendama:**

The hotel's 60-year history has witnessed the most important business, trade fair events, diplomatic, social and political the country. The Hotel Tequendama Company S.A. is a corporation of mixed economy, the national, authorized by law 83 of 1947, under the Ministry of National Defense, under the legal system of industrial and commercial enterprises of the State, endowed with legal personality, administrative autonomy and independent capital





# Sectors of opportunity – Services Capital Funds

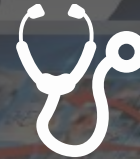
Colombia offers several benefits to invest in capital funds.

- Colombia was ranked fourth in Latin American and the Caribbean due to its favorable conditions for development of the PEF industry.
- 19 International General Partners in Colombia.
- Capital funds such as Advent International and Victoria Capital **have chosen the country as a hub to service other countries in the region**

Some niche opportunities



Real Estate



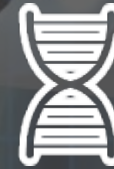
Health



Banking



TIC



Biotechnology



Energy



Agribusiness



Infrastructure



# Sectors of opportunity

## Services Capital Funds

### Brookfield

Canada

Investments mainly in the sectors of infrastructure, energy and real estate.

Investments in the Colombian power company SA as part of its expansion plan in the region.



BRICAPITAL

United States

Firm focused on investing in the category of hotel assets in Colombia.

Its largest investment in Colombia has been the Hyatt Regency Hotel in Cartagena.

DARBY  
PRIVATE EQUITY  
FRANKLIN TEMPLETON  
INVESTMENTS

United States

Mainly infrastructure investments.

In Colombia its investments have been focused in companies such as Intertug and Ocesa.







**PROCOLOMBIA**  
ready to assist you in assessing  
**investment opportunities**



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# THANK YOU



**PROCOLOMBIA**  
EXPORTACIONES TURISMO INVERSIÓN MARCA PAÍS



**TODOS POR UN  
NUEVO PAÍS**  
PAZ EQUIDAD EDUCACIÓN