



## The Biscuits Market in Brazil

**August 1999**

*(Également disponible en français sous le titre,  
Le marché des biscuits au Brésil)*

Prepared by the  
Team Canada Market Research Centre  
and the  
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The Team Canada Market Research Centre produces a wide range of market reports by region and sector for Canadian exporters. For further information please contact:

Market Support Division (TCM)  
Department of Foreign Affairs  
and International Trade  
E-mail: [research.center@dfait-maeci.gc.ca](mailto:research.center@dfait-maeci.gc.ca)

FaxLink Domestic service (613-944-4500);  
DFAIT Internet site  
(<http://www.dfait-maeci.gc.ca>)

Trade Evaluation and Analysis Division  
(TEAD)  
Agriculture and Agri-Food Canada  
Contact: Jim Lowe  
Telephone: (613) 759-7652  
Fax: (613) 759-7505  
E-mail: [lowej@em.agr.ca](mailto:lowej@em.agr.ca)

Agri-Food Trade Service  
(<http://ats.agr.ca>)

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## THE BISCUITS MARKET IN BRAZIL



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### EXECUTIVE SUMMARY

In 1998, the biscuit market in Brazil totalled \$3.2 billion in sales,<sup>(1)</sup> with consumption reaching about 1.2 million tonnes. The market is expected to continue its pattern of growth of more than 10% per year, in both sales and consumption, through 2000.

Argentina led the countries supplying the \$37.6 million import market in 1998, with \$12.6 million in exports, representing 33.5% of the import market. Canada's exports of biscuits continued to decline, reaching \$11,800 and just 0.03% of the import market in 1998. Canadian biscuit manufacturers considering exporting to Brazil are advised to include strong advertising and product development as key elements of their market strategy.

The biscuit market consists of sweet and savoury biscuits, with sweet biscuits the faster growing and more popular of the two subsectors. However, the trend of biscuit sales growth in recent years has been affected by Brazil's recent economic struggles. The economic recession that Brazil is currently experiencing has weakened consumer purchasing power. Consumers are currently less willing to spend extra money for higher priced goods when other products, perceived to be of similar quality, are less expensive. The biscuit market is highly competitive, making success highly dependent upon price competitiveness. Suppliers wishing to enter this sector should consider forming joint ventures or establishing domestic manufacturing facilities in order to lower production costs.

Although the market in southern Brazil is already highly developed and competitive, the northeastern market has not yet reached its full potential. The northeast is responsible for 26% of Brazil's total biscuit consumption - the highest percentage in the country - however, distribution networks are not efficient. Current modernization and privatization of northeastern ports will help decrease transportation time and expenses to inland areas, since goods will not have to make the trek from the south.

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## **THE BISCUITS MARKET IN BRAZIL**



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### **MARKET OVERVIEW**

The biscuit market in Brazil enjoyed much the same growth success through the 1990s as several other food markets, due in part to the economic prosperity brought about by the government's 1994 *Plan Real*. Biscuit manufacturers also made efforts to establish brand loyalty and to improve the quality of their products, which helped improve sales. Between 1991 and 1998, the biscuit market grew by 65%, reaching a total of \$3.2 billion in 1998, with projections for 10% sales growth per year through 2000.

The biscuit market is divided into two sectors: sweet (including sandwiches with filling and wafers) and savoury. Sweet biscuits are the largest segment of the biscuit market, posting an average annual growth rate of 17% from 1991 to 1998. This segment is expected to continue its steady growth, at an average rate slightly above the overall market rate, and to account for nearly 70% of total biscuit sales by 2000.

The savoury sector was slightly more volatile in the early 1990s, but settled into a pattern of steady growth after 1993. Between 1991 and 1998, the average annual growth rate was 17%, and growth is expected to average 12% per year until 2000.

The volume of biscuits consumed in Brazil grew steadily between 1991 and 1998, averaging 11% per year and topping 1.2 million tonnes in 1998, with salted biscuits accounting for 24%, sweet (dry) biscuits 21%, sandwiches with filling 42%, and other biscuits (wafers, and so on) 13%. Consumption growth is expected to continue at approximately the same rate through the turn of the century.

### **Key Factors Shaping Market Growth**

Brazil is currently experiencing an economic recession, following a period of growth brought about by the

stabilization of the economy under the *Plan Real*. Under this plan, Brazil saw the demise of hyperinflation and an increase in consumer purchasing power. Since that time, however, economic performance in Brazil has struggled. The Brazilian economy grew 3.7% in 1997, but slowed to just 0.5% in 1998, its smallest growth since 1992. On January 13, 1999, Brazil was forced to devalue its currency and allow it to float on global markets. Following the devaluation, the *real* plunged, losing more than 35% of its value, which threatened to significantly affect the country's economy, as well as the economies of its Latin American and MERCOSUR partners (the southern cone common market, which includes Brazil, Argentina, Uruguay and Paraguay, with Bolivia and Chile as associate members).

These economic struggles demonstrate Brazil's efforts to defend the overvalued *real* against similar economic collapses in the developing economies of Asia and Russia in 1998. Brazil has been able to recover more quickly than other struggling economies because it does not rely heavily on imports. Interest rates have fallen for eight consecutive periods, from 49% to 22%, and inflation is under control at a rate of less than 8% per annum. Predictions are that Brazil's 1999 economy will shrink by 1.5%.

The increases - historical and forecasted - in the value and volume of the Brazilian biscuit market reveal a rising demand for quality products in various formats. The market is shifting away from large, bulk type packages of biscuits. In 1993, there was an equal split in sales of large 500g packages and small 200g packages. In 1997, the division shifted in favour of small packages to a ratio of 35% to 65%. This shift is the result of a move away from traditional low-priced cream style crackers toward a variety of new products.

Conventional salted biscuits, such as cream crackers, have become "commodities," presenting narrow profit margins and creating a highly competitive market among a great number of producers, resulting in fiercely competitive pricing strategies by all involved.

### **Opportunities**

With the stabilization of the Brazilian economy, the biscuit market in Brazil will offer good opportunities for new participants in the market. It is expected that product innovation and advertising will be the most significant engines for growth in the biscuit sector.

The abundance of small biscuit producers in Brazil means that there are opportunities to form joint ventures. Canadian producers seeking joint ventures or shared production facilities in Brazil will benefit from tariff relief afforded to domestic producers. Producing goods in Brazil would also allow Canadian producers to avoid having to pay the Common External Tariff (CET) when exporting to neighbouring MERCOSUR countries. This strategy would allow Canadian biscuit producers to keep costs down, and competitively price their products.

### **Actual and Planned Projects**

Several Brazilian biscuit producers, including São Luiz, Aymore, Tostines, Mabel, and J Macedo Alimentos, announced expansion plans in late 1998. São Luiz, Aymore, and Tostines planned to launch a total of 14 new products, while Tostines also invested \$11.8 million to modernize its equipment and change its packaging design. The companies may, however, have put some plans on hold due to the severe currency devaluation that occurred in early 1999.

J Macedo Alimentos, the northeast-based manufacturer of *Agua* biscuits, which leads the northeastern biscuit market, announced plans in late 1998 to enter the southeastern biscuit market. Penetration of the market will take place through *Dona Benta*, Brazil's leading flour producer, which also operates in the biscuit market on a small scale. While J Macedo is able to price its products lower than competitors because of its reduced transport and raw material costs, and therefore enjoys a 5.7% market share in the northeast, the company will be forced to price its products higher when transporting them to the southeast.

Mabel, the sixth largest cookies producer in Brazil, invested \$14.8 million to build a plant in *Tres Lagoas*, in the state of *Mato Grosso do Sul*. The plant, which began operations in September, was constructed to increase company market share from 4.5% to 5.8% and to allow for exports to other Latin American countries.

## COMPETITIVE ENVIRONMENT

### Local Capabilities

Due to the logistics and costs of national distribution, the biscuit market is highly fragmented and therefore supplied mainly by small, regional producers. These producers control almost 60% of the biscuit market, with large name-brand producers making up the remaining 40%.

Leading producers in the sweet biscuit subsector in the 200g-package size are:

- Nestlé (São Luiz and Tostines), 23%;
- Danone (Aymore and Triunfo), 22%;
- Nabisco, 6%; and
- Parmalat, 4%.

In the savoury biscuit subsector, the leading producers and their market share are:

- Nestlé, 20%;
- Industrias Productos Alimenticios Piraque, 9%; and
- Aymore Products Alimenticios SA, 8%.

Recognizing the increasingly competitive nature of the market, companies have made several moves in recent years to improve the market position of their products. In the last two years, local biscuit manufacturers have invested over \$145 million to modernize their plants and thus be able to offer a greater variety of products, as well as increase production capacity. In 1998, a number of companies collectively invested \$60 million in marketing campaigns, according to the following break down:

- Nestlé (São Luiz), \$27 million (45%);
- Nestlé (Tostines), \$16.2 million (27%);
- Bauducco, \$3.6 million (6%);
- Nabisco, \$2.4 million (4%);
- Danone-Triunfo, \$1.2 million (2%); and
- Others, \$6 million (16%).

### International Competition

In 1998, Brazil imported \$37.6 million in biscuits, down from \$46.1 million in 1996. Argentina, the largest supplier of biscuits in the three-year period of 1996 to 1998, also saw its exports decline, from \$15.2 million to \$12.6 million in the same period. Despite the decline in the value of its exports, Argentina increased its share of the import market to 33% in 1998. Italy and Sweden each exported approximately \$6 million to Brazil in 1998, capturing 16.7% and 15.9% of the import market, respectively.

**Table 1: Top Five Suppliers of Biscuits to Brazil, 1996-1998 (\$ millions)**

Rank	Country	1996	1997	1998	Share of 1998 Market (%)
1	Argentina	15.220	10.167	12.611	33.5
2	Italy	3.630	6.166	6.285	16.7
3	Sweden	0.006	2.239	5.997	15.9
4	Denmark	7.984	4.500	3.138	8.3
5	Germany	1.072	1.707	1.551	4.1
	<b>TOTAL IMPORTS</b>	<b>46.141</b>	<b>35.028</b>	<b>37.694</b>	-

Note: HS code 190530

Source: *World Trade Atlas*, Global Trade Information Services, Inc., 1999.

Exporters outside MERCOSUR face significant challenges to capture shares of market sectors. Under the MERCOSUR customs union agreement, the four member countries aim to conduct free trade across their borders, including agricultural goods, while other countries still face various tariff and non-tariff barriers. MERCOSUR originally hoped to incorporate Chile and Bolivia by 2000; however, for now these countries remain associate members. In January 1999, inter-regional tariffs between Argentina and Brazil were eliminated following the completion of a five-year cycle of tariff rate deductions. January 2000 will bring the elimination of the same tariffs in Uruguay and Paraguay, completing the elimination of most tariff and non-tariff barriers to trade between the MERCOSUR member countries; however, the customs union will not be in full effect until January 2006, when the Common External Tariff will be uniformly applied by each of the MERCOSUR countries.

The European Union is set to commence free trade discussions with MERCOSUR, including on the topic of agriculture. These discussions are expected to take years to formulate an agreement; however, the impact of an EU-MERCOSUR free trade pact would significantly increase competition for all exports of Canadian agri-food products to the region. Talks will begin in November 1999 to address non-tariff issues, while tariff discussions will begin in July 2001.

### Canadian Position

To date, Canadian biscuit producers have had very little role in the Brazilian market. Canadian biscuit exports to Brazil in 1996 totalled \$42,600 (0.09% market share), but declined in 1997 and 1998 to \$11,800 (0.03% of the import market). Canada's market share varies according to subsector, with sweet biscuits typically comprising a larger percentage of Canadian exports.

**Table 2: Canadian Supply of Biscuits to Brazil, 1996-1998 (\$ millions)**

Rank	Country	1996	1997	1998	Share of 1998 Market (%)
28	Canada	0.042	0.021	0.012	0.03
	TOTAL IMPORTS	46.141	35.028	37.694	-

Note: HS code 190530

Source: *World Trade Atlas*, Global Trade Information Services, Inc., 1999.

### Competitive Advantage through Canadian Government Policies and Initiatives

#### ***Export Development Corporation***

The Export Development Corporation (EDC) offers a full range of trade finance services that helps Canadian Exporters and Investors do business in foreign jurisdictions, including higher risk and emerging markets. Founded in 1944, EDC is a Federal Crown Corporation that operates as a commercial financial institution. Principal services are Account Receivable Insurance, Political Risk Insurance, Bonding for International Transactions and the Financing of International Transactions. For more information, please call the EDC at 1-888-332-3320.

#### ***Canadian Commercial Corporation***

The Canadian Commercial Corporation (CCC) also offers small and medium-sized Canadian companies access to financing and better payment terms under the Progress Payment Program (PPP). The PPP concept was developed as a partnership between major Canadian financial institutions and the CCC. It enables the exporter's bank to open a project line of credit for the exporter's benefit, based on CCC approval of the project and the exporter's ability to perform. For more information, please contact the CCC.

#### ***Program for Export Market Development***

The Program for Export Market Development (PEMD) is the government's primary international business development program. The objective of PEMD is to increase export sales of Canadian goods and services

by sharing the costs of activities that companies normally could not or would not undertake alone, thereby reducing risks involved in entering a foreign market. The PEMD refundable contribution is a minimum of \$5,000 and a maximum of \$50,000. Preference is given to companies with annual sales greater than \$250,000 and less than \$10 million, or with less than 100 employees for a firm in the manufacturing sector and 50 in the service industry. Eligible activities, the costs of which are shared on a 50/50 basis, include market visits, trade fairs, incoming buyers, product testing for market certification, legal fees for marketing agreements abroad, transportation costs of off-shore company trainees, product demonstration costs, promotional materials, and other costs necessary to execute the market development plan (Other components of the program deal with international bid preparation under Capital Project Bidding, and with Trade Associations when developing international marketing activities for their membership). For additional information, or to receive an application, please contact the International Trade Centre in your province.

### ***WIN Exports***

Exporters are encouraged to register with WIN Exports, a database of Canadian exporters and their capabilities, which is used by trade commissioners around the world and by Team Canada partners in Canada to match Canadian suppliers to foreign business leads and to share information on trade events. For more information, please visit [www.infoexport.gc.ca/section2/winexp2-e.asp](http://www.infoexport.gc.ca/section2/winexp2-e.asp).

## **MARKET LOGISTICS**

### **Channels of Distribution**

The distribution system in Brazil for biscuits is well established in certain regions and non-existent in others. Recent developments in the system have seen the introduction of a North American style retail system, and it is believed that this new system will directly benefit the biscuit industry.

Most imports arrive at the ports of Santos and Rio de Janeiro before being transported overland to various destinations throughout the country. Generally, freight costs associated with distributing goods in this manner raise the cost of imported foods, making them more expensive in the northern than in southern or central regions. As the northeast food market continues to develop, and as regional ports become privatized and modernized, it will become more economically viable to ship directly to the northeast ports of Salvador, Recife, or Fortaleza, rather than to truck the products overland from southern ports for 2 000 to 4 000 kilometres.

### **Direct Sales**

Direct sales to the end user are rare, although opportunities are increasing. Food manufacturers, supermarkets, and large food retailers are beginning to buy a small percentage of imports directly from foreign suppliers. The most popular items to be imported directly are those selling in high volumes and with high turnover. Hiring an agent to aid in coordinating direct sales can be invaluable to establishing a successful import contract.

Foreign companies are permitted to engage directly in trade in Brazil. In many regions, particularly the northeast, foreign companies are being actively sought to invest with the lure of financial incentives.

The opportunity for direct sales is also increasing with the expansion of private label segments in retail outlets. Private labels necessitate the availability of quality products at competitive prices.

### **Agents and Sales Representatives**

Since for years the Brazilian market was closed to foreign competition, hiring a local agent/importer is critical to an exporter's success. The knowledge accumulated by agents during the years before the market was opened to imports can prove invaluable to newly exporting suppliers, saving both time and money for the supplying companies. The local agent or agents should be able to import the product, deal with regulatory agencies, handle local sales and distribution, and handle product promotion. Because of Brazil's geographic size, exporters may find it necessary to employ more than one agent to ensure national distribution.

Exporters are advised to choose an agent with the utmost care and to ensure that the agent is registered

with local authorities before signing an agreement. Before selecting an agent, exporters are recommended to verify the agent's reputation by contacting the Consulate in São Paulo. In addition, the Consulate can provide a list of companies that are capable of performing credit checks and can advise on details such as sales volume, employees, and recommendations for credit limits.

Once an agreement has been signed, a Brazilian agent is protected by law from unilateral termination of the contract without just cause. "Just cause" is limited to negligence of the agent, breach of the contract, acts by the agent that are damaging to the foreign principal, or conviction of the agent for a serious criminal offence.

### **Retail Distributors**

The development of supermarkets and hypermarkets has enabled the expansion and diversification of imported processed food product lines. These stores are introducing both one-stop shopping and a new line of convenience foods. Moreover, traditional markets and local stores are beginning to expand the product lines and kinds of food they carry. These are distribution channels with excellent potential for growth.

In the past two years, the Brazilian supermarket sector has experienced massive consolidation. In 1997 and 1998, three of Brazil's top five supermarket chains - the French-owned Carrefour and the locally owned Pao de Acucar and Bompreco - made a number of acquisitions in order to expand their markets in specific regions. Carrefour and Pao de Acucar added to their market leadership in São Paulo state, while Bompreco solidified its role as the market leader in the northeast. Jeronimo Martins and Sonae, Portugal's leading supermarket chains, and Wal-Mart Brasil also made significant purchases in late 1997. ABRAS, Brazil's association of supermarkets, estimates that within the next five years, Brazil's five largest chains will hold 40-45% market share. Overall, supermarkets and hypermarkets currently account for 75% of retail sector food sales. As the Brazilian retail sector continues with supermarket expansion and as the variety of products offered increases, opportunities for import growth will develop. With the diversification of consumer tastes, there will be a demand for both higher-quality foods, and a greater selection of international food options.

### **Market-entry Considerations**

Traditionally Brazilian companies have not significantly invested time or money into advertising or new product development. However, some Brazilian companies have begun to realize the need for new product development upon the arrival of, and increasing competition from, foreign suppliers. In properly promoting and developing products to suit the tastes of the Brazilian consumer, Canadian companies entering the market may be able to establish brand awareness among consumers and eventually generate brand loyalty.

Before the economic recession, Brazilians were willing to pay more for high quality products, which was good news for Canadian producers, whose products are already viewed as being of superior quality. Facing weakened purchasing power, however, consumers generally have become less willing to spend extra money on what may be viewed as "luxury" goods, and they are becoming more adept at assessing price versus quality. Canadian biscuit manufacturers considering entering the market are therefore advised to keep costs as low as possible, in an effort to appeal to the mass market. Alternatively, exporters may choose to adopt a premium pricing strategy targeting wealthier consumers, in recognition of the fact that imports are frequently beyond the means of most consumers anyway.

**Promotion:** Since there is little brand awareness of Canadian products in Brazil, it is important for exporters to undertake promotional and marketing activities. Processed food in Brazil is advertised through a variety of media types, the most popular of which is television. The Brazilian television industry, with 112 stations, is highly developed. Radio, magazines and newspapers are other advertising media employed.

The increasing competition expected as a result of growth in the supermarket and hypermarket sectors will necessitate strong in-store promotional strategies. In addition, competitive pricing is a must for products aimed at the price-conscious general consumer. If a product is to be priced higher, promotional material should stress its superior quality in order to address consumers' price concerns.

Exporters should be aware that some supermarkets display imported products in a separate part of the store. This type of product segregation should be avoided if possible, since import sections tend to have a lower volume of consumer traffic.



**Transportation and storage:** Fully 90% of the cargo shipped within Brazil is transported via its 1.6 million km of roadways. Rail transportation is not as well developed and is typically used only for grains or manufactured goods such as cars.

The most common method of transport into Brazil is via ship. In fact, ports handle approximately 98% of all trade. Brazil has one thousand ports, of which 39 are ocean ports, which can handle ships up to 100 000 tonnes. The two most important ports are in southern Brazil, in Santos and Rio de Janeiro, and have extensive facilities, such as bonded and/or refrigerated warehouses.

In addition to the ocean ports, Brazil has numerous river ports and approximately 50 000 km of navigable inland water ways.

### Suggested Business Practices

When establishing contacts in Brazil, exporters are advised to arrange for an introduction by a respected third party, rather than attempting to make contact on their own. Canadian Trade Commissioners can assist in arranging this type of introduction.

Brazilians are not receptive to the often-aggressive North American attitude toward conducting business. Exporters are encouraged to visit the country to foster trust through personal contact and to demonstrate long-term commitment to the business relationship. Since personal relationships are important to Brazilians, exporters are advised to keep the members of the negotiating teams consistent in order to avoid undermining progress that has been made. Exporters should be prepared to discuss all aspects of the contract simultaneously rather than sequentially. It is also advisable for exporters to arrange to have a local accountant and a notary or lawyer present during negotiations to advise on contractual issues, since Brazilians tend to be unreceptive to an outside legal presence. Fostering the business relationship through visits and personal contact is just as important following the successful close of a deal as it is during negotiations.

### Import Regulations

Imports to Brazil face duties ranging from 0% to 40%, with the average tariff under the CET being 17%. Several other taxes and fees are also levied against imports, as shown in Table 3.

**Table 3: Taxes and Fees Levied on Imports**

Syndicate Fee	-- 2.2% of c.i.f. value
Brokerage Fee	-- 1% of c.i.f. value
Warehouse Tax	-- 1% of import duty
Fee for handling charges	-- between \$28-\$140, but varies
Administrative Commission	-- fixed at \$140
Import Licence Fee	-- approximately \$140
Additional Port Tax	-- two fees totalling 3% of c.i.f. value
Merchant Marine Renewal Tax	-- 25% of ocean freight charge (sea imports only)

Source: *Customs Guide to The Americas, Brazil, 1997*

In addition, there are two government taxes that may be applied:

1) The Industrial Products Tax (IPI) is a federal tax levied on both imported and domestic products. The tax is assessed at the point of customs clearance for imports. The value of the tax is based on the c.i.f. value of the products, plus duties. As a guideline, products that incur a low import tariff generally pay a low IPI, and vice versa. Most agri-food products are exempt from the IPI, but exporters should confirm the exemption for biscuits.

2) The Merchandise Circulation Tax (ICMS) is a state government value-added tax that is applicable to both imports and domestic products. The value of the tax varies from state to state, but averages 17%. The ICMS on imports is assessed *ad valorem* on the c.i.f. value, duties, and IPI. The cost of this tax is generally

passed on to the buyer in the price paid for the product.

Current information concerning tariff duties and rates can be obtained by contacting:

Tariffs and Market Access Division (EAT)  
Department of Foreign Affairs and International Trade  
Tel: (613) 944-5070 / 944-1569  
Fax: (613) 992-6002

In May 1994, Brazil created four free trade zones, all located in northern Brazil to encourage trade in the north: Manaus, in the state of Amazonas; Macapá/Santana in the state of Amapá; Tabatinga, in the state of Amazonas, on the border with Peru; and Guajará-Mirim, in the state of Rondônia, on the border with Bolivia. Of these, the most developed is the Manaus Free Trade Zone, which offers special incentives to encourage industrial, commercial, and agricultural development in the heart of the Amazon. Thus far, the venture has been successful, warranting an extension of the incentives to 2013. Goods entering these ports are not subject to custom duties or to federal, state, or local import taxes.

Regulations governing inter-state trade vary from state to state. These regulations can restrict the movement of goods between Brazil's various states. For specific information on state restrictions and rules, contact the Canadian Embassy in Brasilia.

### **Local Standards, Certificates or Registrations**

*Health and Food Safety:* For the import of agri-food products, Brazilian authorities currently require a health and sanitary Product Certificate issued by Agriculture Canada and duly stamped by a Brazilian Consulate (Montreal or Toronto) in Canada. At the time of printing, the Brazilian government has informed the Canadian Embassy in Brazil that it has eliminated the requirement for consularization of Canadian sanitary certificates. Pending official notification, the Canadian Embassy in Brazil will be able to officially advise Canadian exporters according to the new regulations. For verification, Canadian exporters are encouraged to contact the Brazilian Consulate in Montreal or Toronto.

In January 1999, a new food safety inspection agency, the National Agency for Sanitary Surveillance (ANVS), was created to be the scientific regulatory agency responsible for the safety of all foods (except those such as meat, poultry, dairy, fisheries, alcoholic beverages, feed, and veterinary products, which fall under the Ministry of Agriculture), and other consumer products. The ANVS reports to the Ministry of Health, and includes five departments, including the Department of Food and Toxicology (concerned with food production) and the Department of Ports, Airports, and Borders (which covers food imports and exports). Imported food products must be registered with the ANSV before they enter the country.

The Brazilian Ministry of Agriculture and Food Supply (MAA) is expected to create a similar agency to monitor grain products, which could affect biscuit producers should its regulations influence the quality of flours. Animal and plant health, animal products, and beverages inspections are also likely to be monitored by the MAA.

*Registration at Brazilian National Health Agency:* The Brazilian National Health Agency has introduced changes to the legislation. As of 1 March 2000, imported food products will require registration, which must be in conformity with Ordinance SVS 120/99. Raw materials and natural food items are exempt from this requirement. For a copy of the legislation in English or French, please contact the Canadian Embassy in Brazil.

*Packaging and Labelling:* Shipping marks, port of destination, and package number must be prominently shown on the shipping case and positioned so as to avoid being covered by any later strapping. Markings of any other kind should be in a less prominent location and should be limited to essential data. Any identifying marks used on the bill of lading should also appear on the shipping case.

Labelling for biscuit products need not be approved by the Health Ministry, but must conform to Ordinance 42/98 issued by the Brazilian Health Ministry. For a copy of the legislation in English or French, please contact the Canadian Embassy in Brazil.

*Retail Packaging:* Brazilian consumers enjoy the attractive modern packaging of imported goods that

domestic products have yet to provide. Under the Brazilian Consumer Protection Code, all product labelling must include the following:

quality; price;  
quantity; guarantee;  
composition; shelf life;  
origin (to include name/address/phone of the producer); and  
risks to consumer health and safety.

All information must be clear, precise, easy to read, and translated into Portuguese. If the package is not printed in Portuguese, a label with the required information in Portuguese must be glued to the package.

*Import Permit:* The import permit is the most important document required for exporting to Brazil. To acquire an import permit, an application must be made to the Foreign Trade Department of the Bank of Brazil (DECEX).

There is a new automated system for obtaining import licences, called SISCOMEX. All applications for licences are now processed on-line for a fee of R\$30 (\$25.81 in 1999) per import statement, and R\$10 (\$8.61) per product added to the statement. For information on how to apply on-line, contact one of the Canadian consulates in Brazil or the Brazilian Secretariat of Foreign Trade (SECEX).

The issued permit will state that it is valid for 90 days, the maximum time for embarkation of goods, or in certain cases, for registering the Import Declaration. Exporters requiring an extension because of special operations or predefined exceptions should direct their petition to the Secretariat of Foreign Trade (SECEX).

*Commercial Invoice:* The invoice should be prepared by the manufacturer or the seller in the country of origin, and should provide the following: full address of the shipper, seller, and consignee; import permit number and other reference numbers; date of order; shipping date; delivery and payment terms; and complete description of the merchandise and markings.

*Pro-forma Invoice:* Exporters require this invoice in order to apply for an import permit, and the original should be notarized. The invoice must include a full description of goods, including:

- name and address of manufacturer or exporter;
- signed verification that product prices are current export market price for export to any country;
- if applicable, name and address of agent, distributor, representative, or concessionaire in Brazil, and statement of commission due;
- unit price, total cost, freight, insurance and other charges;
- if applicable, statement that published catalogues or price lists do not exist for the invoiced products.

*Bill of Lading:* The bill of lading should be nonnegotiable, numbered, and dated. A copy should be attached to each commercial invoice. The bill must also display the import licence number and expiration date, as well as the freight charges in both numbers and words.

*Special Documentation:* Various special documents are required for the importation of specific products. Exporters are encouraged to consult with local agents to ensure that the documentary needs for their products are met.

All documents must accompany the product when it enters customs and must be accurately completed to avoid long delays and/or fines. According to Brazil's Basic Import Regulations, the fines in Brazil can be very heavy; for example, importing without an import permit can result in fines ranging from 20% to 100% of the c.i.f. value of the products.

*Authentication of documents:* Documents requiring authentication, such as certificates of sale and letters authorizing an exporter's local agent or importer to act on their behalf, must first be notarized in Canada. The notarized documents can then be authenticated, free of charge, by sending them to:

Department of Foreign Affairs and International Trade  
Authentication and Service of Documents (JLAC)

125 Sussex Dr.  
 Ottawa, ON K1A 0G2  
 Tel: (613) 992-6602  
 Fax: (613) 992-2467

### Export Credit Risks, Restrictions on Letters of Credit or Currency Controls

On March 17, 1999, the Brazilian Central Bank announced its decision to lift restrictions on import financing that were introduced in 1997. Short-term financing is now allowed. The decision was made because of the scarcity of credit lines exceeding one year and with the aim of reducing the pressure exerted by imports on the demand for U.S. dollars and on the exchange rate. For more detailed information, please contact the Canadian Embassy in Brasilia.

### PROMOTIONAL EVENTS

#### Event/Description

#### Organizer/Contact

##### Gas & Shop

November 23-26, 1999  
 November 2000 (TBC)  
 São Paulo, SP Brazil  
 Aimed at suppliers of food to convenience stores such as snacks, beer, confectionary, biscuits and frozen products.

Miller Freeman do Brasil Ltda.  
 Rua Vanderlei 848  
 Cep: 05011-001  
 São Paulo, SP Brazil  
 Tel: (55-11) 3873-0081  
 Fax: (55-11) 3873-1912  
 Contact: Claudia Godoy  
 E-mail: [cgodoy@mfbr.com](mailto:cgodoy@mfbr.com)  
 Internet: [www.mfbr.com](http://www.mfbr.com)

##### ABIA Food Service 2000

February 8-11, 2000  
 São Paulo, SP Brazil  
 International trade show for food industry; cafeterias, restaurants, hotels, convenience stores, grocery stores.

AMM Feiras & Negócios  
 Av. Nove de Julho 5966 cj.31  
 Cep: 01406-200  
 São Paulo, SP Brazil  
 Tel: (55-11) 3063-3205  
 Fax: (55-11) 3068-9472  
 Contact: Ana Passoni  
 E-mail: [amm@mtecnetsp.com.br](mailto:amm@mtecnetsp.com.br)

##### Sweet Brazil

April 2000 (TBC)  
 São Paulo, SP Brazil  
 International chocolate, candies, confectionery and related products show.

Franca Feiras Empreendimentos  
 Alameda Mamoré 503 1<sup>st</sup> floor  
 Cep: 06454-040 - Alphaville  
 São Paulo, SP Brazil  
 Tel: (55-11) 7291-8188  
 Fax: (55-11) 7291-0200  
 Contact: Cintia Dias  
 E-mail: [feiras@franca.com.br](mailto:feiras@franca.com.br)  
 Internet: [www.franca.com.br](http://www.franca.com.br)

**FISPAL**

June 13-16, 2000  
 São Paulo, SP Brazil  
 International, open to traders only. The major products exhibited are food and beverage, raw material packaging, equipment and services.

Brasil Rio Promoções Empreendimentos  
 Rua Ministro Nelson Hungria 239 cj04  
 Cep: 05690-060 - Real Parque  
 São Paulo, SP Brazil  
 Tel: (55-11) 3758-0996  
 Fax: (55-11) 3758-0165  
 Contact: Ligia Castro  
 Internet: [www.grupobrasilrio.com.br](http://www.grupobrasilrio.com.br)

Brasil Pan - International Exhibition and Conference on Technology for Baking and Confectionery Industry in South America  
 July 2000 (TBC)  
 São Paulo, SP Brazil  
 Trade show for the baking and confectionery industry aimed at suppliers of equipments, machinery, ingredients, packaging, services and food and beverage products.

Miller Freeman do Brasil Ltda.  
 Rua Vanderlei 848  
 Cep: 05011-001  
 São Paulo, SP Brazil  
 Tel: (55-11) 3873-0081  
 Fax: (55-11) 3873-1912  
 Contact: Claudia Godoy  
 E-mail: [bpn@mfbr.com](mailto:bpn@mfbr.com)  
 Internet: [www.mfbr.com](http://www.mfbr.com)

**Tecno Alimentaria Latin America**

- 2<sup>nd</sup> Tecno Bebida  
 - 5<sup>th</sup> Food Ingredients Brazil  
 August 2-4, 2000  
 São Paulo, SP Brazil  
 Trade shows for the food and beverage industry aimed at suppliers of machinery, equipment, services, packaging and raw material (for Tecno Bebida) and food ingredients, flavourings, colourings and preserving devices (for Food Ingredients Brazil)

Miller Freeman do Brasil Ltda.  
 Rua Vanderlei 848  
 Cep: 05011-001  
 São Paulo, SP Brazil  
 Tel: (55-11) 3873-0081  
 Fax: (55-11) 3873-1912  
 Contact: Claudia Godoy  
 E-mail: [cgodoy@mfbr.com](mailto:cgodoy@mfbr.com)  
 Internet: [www.mfbr.com](http://www.mfbr.com)

**EQUIPOTEL**

August 2000 (TBC)  
 São Paulo, SP Brazil  
 International trade show for suppliers of machinery, products and services to restaurants, fast foods, chains and hotels.

Equipotel Feiras, Edições e Promoções Ltda.  
 Rua Afonso Celso 797  
 Cep: 04119-060  
 São Paulo, SP Brazil  
 Tel: (55-11) 574-5166  
 Fax: (55-11) 574-5043  
 Contact: Fernanda Secco

**ABRAS**

September 2000 (TBC)  
 Rio de Janeiro, RJ Brazil  
 Food showcase targeting agri-food manufacturers and retailers. Largest show in the sector in Brazil. Organized by the Brazilian Supermarkets Association.

ABRAS  
 Av. Diógenes Ribeiro de Lima 2872  
 Cep: 05083-901 - Alto da Lapa  
 São Paulo, SP Brazil  
 Tel: (55-11) 838-4500  
 Fax: (55-11) 837-9933  
 Contact: Claudio Guidini

**KEY CONTACTS AND SUPPORT SERVICES****Canadian Government Contacts**

**Canadian Embassy**

SES Av. das Nações, Lote 16  
70410-900 Brasília, DF, Brazil  
Contact: David Weiner  
First Secretary (Commercial/Economic)  
Tel: (55-61) 321-2171  
Fax: (55-61) 321-4529  
E-mail: [david.weiner@dfait-maeci.gc.ca](mailto:david.weiner@dfait-maeci.gc.ca)

**Canadian Consulate General, Rio de Janeiro**

Rua Lauro Muller 116, Room 2707  
Torre Rio Sul-Botafogo, 22290-116  
Rio de Janeiro, RJ Brazil  
Tel: (55-21) 542-7593 / 275-2039  
Fax: (55-21) 275-2195

**Canadian Consulate General, São Paulo**

Edifício Top Center  
Avenida Paulista 854, 5 Andar  
01310-913 São Paulo, SP Brazil  
Contact: Claude N. Fontaine, Senior Trade  
Commissioner  
Tel: (55-11) 253-4944  
Fax: (55-11) 3171-0058  
E-mail: [infocentre-spalo@dfait-maeci.gc.ca](mailto:infocentre-spalo@dfait-maeci.gc.ca)

**Department of Foreign Affairs and International Trade**

Market Support Division (TCM)  
125 Sussex Dr.  
Ottawa, ON K1A 0G2  
Contact: Robert Lazariuk  
Tel: (613) 995-1773  
Fax: (613) 944-0050

**Department of Foreign Affairs and International Trade**

South American and Inter-American Division  
(LSR)  
125 Sussex Dr.  
Ottawa, ON K1A 0G2  
Tel: (613) 996-3026  
Fax: (613) 944-0470

**Agriculture and Agri-Food Canada**

Sir John Carling Building  
930 Carling Ave.  
Ottawa, ON K1A 0C5  
Contact: Marcello di Franco, Senior  
International Market Development Officer  
Tel: (613) 759-7753  
Fax: (613) 759-7505  
E-mail: [difrancom@em.agr.ca](mailto:difrancom@em.agr.ca)

**Business Development Bank of Canada**

#400, 5 Place Ville Marie  
Montreal, QC H3B 2G2  
Tel: 1-888-463-6232  
Fax: (514) 283-0617  
Internet: <http://www.bdc.ca/>

**Canadian Commercial Corporation**

Metropolitan Centre  
50 O'Connor St., 11th Floor  
Ottawa, ON K1A 0S6  
Tel: 1-800-748-8191 / (613) 996-0034  
Fax: (613) 995-2121  
E-mail: [info@ccc.ca](mailto:info@ccc.ca)  
Internet: <http://www.ccc.ca>

**Canadian International Development Agency (CIDA)**

Place du Centre  
200 Promenade du Portage  
Hull, QC K1A 0G4  
Tel: (819) 997-5456  
Fax: (819) 953-5024

**Export Development Corporation**

151 O'Connor St.  
Ottawa, ON K1A 1K3  
Tel: (613) 598-2500  
Fax: (613) 598-6697  
E-mail: [export@edc4.edc.ca](mailto:export@edc4.edc.ca)  
Internet: <http://www.edc.ca>

**Agriculture and Agri-Food Canada**

*The Agri-Food Trade Service regional contacts:*

Al McIsaac  
*St. John's, NF*  
 Tel.: (709) 772-0330  
 E-mail: [mcisaaca@em.agr.ca](mailto:mcisaaca@em.agr.ca)

Shelley Manning  
*Halifax, NS*  
 Tel.: (902) 426-2137  
 E-mail: [mannings@em.agr.ca](mailto:mannings@em.agr.ca)

Bernard Mallet  
*Moncton, NB*  
 Tel.: (506) 452-3732  
 E-mail: [malletb@em.agr.ca](mailto:malletb@em.agr.ca)

Chris Pharo  
*Charlottetown, PEI*  
 Tel.: (902) 566-7310  
 E-mail: [pharoc@em.agr.ca](mailto:pharoc@em.agr.ca)

Marc Chénier  
*Montréal, QC*  
 Tel.: (514) 283-3815 (510)  
 E-mail: [chenierm@em.agr.ca](mailto:chenierm@em.agr.ca)

Nancy Cherny  
*Guelph, ON*  
 Tel.: (519) 937-5856  
 E-mail: [chernyn@em.agr.ca](mailto:chernyn@em.agr.ca)

Fay Abizadeh  
*Winnipeg, MB*  
 Tel.: (204) 983-8622  
 E-mail: [abizadehf@em.agr.ca](mailto:abizadehf@em.agr.ca)

Roy Gordon  
*Regina, SK*  
 Tel.: (306) 780-7134  
 E-mail: [gordonr@em.agr.ca](mailto:gordonr@em.agr.ca)

Rodney Dlugos  
*Edmonton, AB*  
 Tel.: (403) 495-5526  
 E-mail: [dlugosr@em.agr.ca](mailto:dlugosr@em.agr.ca)

Marg Toronchuk  
*New Westminster, BC*  
 Tel.: (604) 666-7797  
 E-mail: [toronchukm@em.agr.ca](mailto:toronchukm@em.agr.ca)

#### Taiwan Government Offices

##### Board of Foreign Trade

1 Hu Kou St.  
 Taipei, Taiwan  
 Tel: (886-2) 351-0271  
 Fax: (886-2) 331-5387

##### Bureau of Commodity Inspection and Quarantine

4 Chi Nan Rd., Section 1  
 Taipei, Taiwan  
 Tel: (886-2) 351-2141  
 Fax: (886-2) 393-2324

##### National Laboratories of Foods and Drugs, Department of Health

161-2 Kun Yang St.  
 Nanking District  
 Taipei, Taiwan  
 Tel: (886-2) 785-6283  
 Fax: (886-2) 389-9860

##### Customs Authority

Director General, Directorate General of Customs  
 85 Hsin-Sheng South Rd., Section 1  
 Taipei, Taiwan  
 Tel: (886-2) 351-2875  
 Fax: (886-2) 711-4166

#### Brazilian Government Offices in Canada

##### Brazilian Embassy

450 Wilbrod St.  
 Ottawa, ON K1N 6M8  
 Tel: (613) 237-1090  
 Fax: (613) 237-6144

##### Brazilian Consulate General, Vancouver

##### Brazilian Consulate General, Montreal

2000 Mansfield St.  
 Montreal, QC H3A 3A5  
 Tel: (514) 499-0968  
 Fax: (514) 499-3963  
 E-mail: [consbras@brasil.interax.net](mailto:consbras@brasil.interax.net)

1140 Bender St., Suite 1300  
 Vancouver, BC V6E 4G1  
 Tel: (604) 687-4589  
 Fax: (604) 681-6534  
 E-mail: [cbg@mindlink.net](mailto:cbg@mindlink.net)

**Brazilian Consulate General, Toronto**  
 Trade Commission  
 77 Bloor St. W., Suite 1109  
 Toronto, ON M5F 1M2  
 Tel: (416) 922-2503  
 Fax: (416) 922-1832  
 E-mail: [cgbtor@interlog.com](mailto:cgbtor@interlog.com)

### **Brazilian Government Offices in Brazil**

#### **Foreign Trade and Investment Department (DECEX)**

Av. Nilo Peçanha, 50  
 32 ° andar / sala 3216  
 20044-900 Rio de Janeiro, RJ Brazil  
 Tel: (55-21) 534-8145  
 Fax: (55-21) 262-1495

#### **Ministry of Foreign Affairs (MRE)**

Trade Promotion Department  
 Esplanada dos Ministérios  
 Palácio do Itamaraty - 70170-900  
 Brasília, DF Brazil  
 Tel: (55-61) 211- 6240  
 Fax: (55-61) 223 - 2392

#### **Technical Department of Tariffs (DTT)**

Av. Presidente Antonio Carlos, 375  
 11° andar 20020-010  
 Rio de Janeiro, RJ Brazil  
 Tel: (55-21) 240- 2548  
 Fax: (55-21) 240-2857

#### **Secretariat of Foreign Trade (SECEX: Secretaria de Comércio Exterior)**

Department of Operations of Foreign Trade  
 Paulo Cezar De Freitas Samico, Director  
 Praça Pio X, 54  
 4º Andar Sala 402  
 20091-040 Rio De Janeiro, RJ Brazil  
 Tel: (55-21) 216-0505 / 263-8796  
 Fax: (55-21) 216-0563

### **Chambers of Commerce and Industry Associations**

#### **Brazilian Association of Trading Companies (ABECE)**

Rua Da Quitanda, 191 - 6° andar  
 20091-000 Rio de Janeiro, RJ Brazil  
 Tel: (55-21) 253-1225  
 Fax: (55-21) 253-7278

#### **Brazil-Canada Chamber of Commerce**

Suite 300, 360 Bay St.  
 Toronto, ON M5H 2V6  
 Tel : (416) 364-3555  
 Fax : (416) 364-3453

#### **National Confederation of Industry**

*Rio de Janeiro*  
 Ac. Nilo Peçanha, 50/34° andar  
 20044-900, Rio de Janeiro, RJ Brazil  
 Tel: (55-21) 534-8000  
 Fax: (55-21) 262-1495

#### *Brasília*

SBN - Quadra 1 - Bloco C  
 Ed Rovertto Simonsen  
 70040-903 Brasília, DF Brazil  
 Tel: (55-61) 321-7788



**Brazilian Foreign Trade Association (AEB)**

Av. General Justo, 335/ 4° andar  
 20021-130 Rio de Janeiro, RJ Brazil  
 Tel: (55-21) 240-5048  
 Fax: (55-21) 240-5463

**Canadian Council for the Americas**

360 Bay St., Suite 300  
 Toronto, ON M5H 2V6  
 Tel: (416) 367-4313  
 Fax: (416) 367-5460

**Federation of Foreign Trade Chambers (FCCE)**

Av. General Justo, 307/ 6° andar  
 20021-130  
 Rio de Janeiro, RJ Brazil  
 Tel: (55-21) 297-0011  
 Fax: (55-21) 240-1622

Fax: (55-61) 224-2292

**National Confederation of Commerce**

Av. General Justo, 307  
 20021-000, Rio de Janeiro, RJ Brazil  
 Tel: (55-21) 297-0011  
 Fax: (55-21) 240-1622

**Canadian Banks in Brazil****Bank of Montreal**

(Banco De Montreal S.A.)  
 AV. Rio Branco 143-18 Andar  
 20040-006  
 Rio De Janeiro, RJ 20149 Brazil  
 Representative: Ely Couto  
 Tel: (55-21) 271-0428  
 Fax: (55-21) 242-9543

**Royal Bank of Canada**

(Banco Royal Do Canada (Brasil) S.A.)  
 Avendia Paulista 460-16 Andar  
 0310 São Paulo, SP, Brazil  
 Representative: C.A. Barbouth  
 Tel: (55-11) 283-3911  
 Fax: (55-11) 384-0508

**BIBLIOGRAPHY**

Canadian Foreign Service Institute Centre for Intercultural Learning Anthology. *Brazil - An Introduction*, 1997.

Euromonitor/Emerging Markets. *"The Market for Packaged Food in Latin America"*, 1996.

Exporter's Encyclopaedia. *Brazil Country Profile*, Dun & Bradstreet, 1995.

United Nations. International Trade Databank, 1997.

Department of Foreign Affairs and International Trade. *Overview of the Climate for Doing Business in Brazil*, January 1996 (faxlink no. 82199)

National Trade Data Bank, United States Department of Agriculture. *Foreign Agricultural Service: Brazil's Food Market*, 1996

**OTHER REFERENCE MATERIAL****Useful Internet Sites**

Agri-Food Trade Service:

<http://ats.agr.ca>

Brazilian Central Bank:

<http://www.bcb.gov.br>

Brazilian Development Bank:

<http://www.bndes.gov.br>

Brazilian Institute of Geography and Economics:

<http://www.ibge.gov.br>

Brazilian Ministry of External Relations:

<http://www.dpr.mre.gov.br>

Brazilian Ministry of Finance:

<http://www.fazenda.gov.br>

Brazilian Support Service to Small Business:

<http://www.sebrae.org.br>

BrazilTradeNet:

<http://www.dpr.mre.gov.br/e/default-e.htm>

Canadian Consulate General in São Paulo:

[http://www.dfait-maeci.gc.ca/spaulo/in/walt\\_in.htm](http://www.dfait-maeci.gc.ca/spaulo/in/walt_in.htm)

Exhibitions 'Round the World:

<http://www.exhibitions-world.com/>

Governments on the WWW: Brazil:

<http://www.gksoft.com/govt/en/br.html>

InfoExport:

<http://www.infoexport.gc.ca>

Inside Brazil:

<http://www.amcham.com.br/publicadept/inside/ibhis.htm>

International Development Research Center (IDRC):

<http://www.idrc.ca/lacro/investigacion/mercosur.html>

Strategis:

<http://strategis.ic.gc.ca/>

Tradeport:

<http://www.tradeport.org>

Trade Show Central:

<http://www.tscentral.com>

U.S. Department of Agriculture:

<http://www.fas.usda.gov/>

World Bank:

<http://www.worldbank.org/>

**READER EVALUATION**

Please help the Team Canada Market Research Centre to produce market reports which meet your information needs by completing this evaluation form and returning it by fax (613) 943-1103. Thank you for your valuable input.

**1. How did you obtain a copy of this market report?**

- InfoCentre FaxLink system
- Government worldwide web site
- InfoCentre help line
- InfoCentre bulletin board system
- Local government office
- Other: \_\_\_\_\_

**2. How would you describe this market report?**

	Strongly agree	Agree	No opinion	Disagree	Strongly disagree
Useful	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Complete	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Well organized	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Well written	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ideal length	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**3. In what form do you prefer to obtain these reports?**

- Print
- Electronic

**4. Based on the information in this report, what specific action(s) does your organization plan to take in this market? Check all that apply.**

- Seek an agent/distributor
- Contact Canadian trade office abroad
- Visit the market
- Participate in a trade show abroad
- Do more research
- Nothing
- Other: \_\_\_\_\_

**5. What other market reports would be of benefit to your organization? Please identify specific products and countries.**

└─
└─

**6. Which of the following categories best describes your organization? Check one only.**

- Processor/manufacture
- Government
- Trading house
- Student/academia
- Export service provider
- Consultant
- Industry/trade association
- Other: \_\_\_\_\_

**7. What were your organization's total sales last year, in Canadian dollars?**

- Less than 10 million     10 million to 50 million  
 More than 50 million     Not applicable

**Additional comments/suggestions for improvement:**

└─
└─
└─

**OPTIONAL** — The name of your organization is: \_\_\_\_\_