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Market Information Latin America and Caribbean

The Food Ingredients Market in Brazil

August 2001



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

Prepared by the
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and the
Canadian Trade Commissioner Service

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THE FOOD INGREDIENTS MARKET IN BRAZIL



EXECUTIVE SUMMARY

New investment in Brazil is driving growth in the food industry. Latin America's leading economy is in a more stable and attractive state in the aftermath of its currency devaluation. A number of Brazil's industry sectors, including the food and food-processing sectors, are enjoying the return to positive growth.

Revenue in the Brazilian food sector reached an estimated \$73 billion ⁽¹⁾ in 1999 and represented a 10% share of Brazil's gross domestic product. The market is increasingly competitive, with new domestic and foreign entrants expanding with the local growth.

The food-processing sector will remain a critical component of Brazil's economy and Canadian firms looking to supply ingredients for food product processing will find opportunities in Brazil's market. Among the products in demand are food flavours, edible oils, tomato products, such as concentrates, sauces and ketchup, and potato products. Brazil's growing pasta market will also require more flour supplies in the coming years, thus providing great potential for Canadian wheat exporters.

As growth continues, new food-processing companies will be established and existing firms will expand. This will create demand, not only for more ingredients, but for new ingredients, products and suppliers.

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**THE FOOD INGREDIENTS MARKET
IN BRAZIL**



MARKET OVERVIEW

Brazil is the largest economic power in Latin America and the tenth-largest economy in the world. The country has a population of approximately 170 million, making Brazil the most populous country in Latin America. Seventy-five percent of the total population lives in urban areas, particularly in São Paulo, Rio de Janeiro, and Belo Horizonte.

Brazil's rapid population growth has assisted with the development of the country's economy. However, there has been a high cost in terms of social, environmental, and political problems in major cities.

Approximately 30% of the population is under 14 years of age; 65% is 15-64 years old; and 5% is over 65. The primary language is Portuguese and English is spoken to a lesser degree.

Brazil's gross domestic product (GDP) in 2000 was \$651.1 billion⁽²⁾. The effects of the economic liberalization program that started in mid 1994--the Plano Real (named after the Brazilian currency)--are still being felt. The Cardoso administration made economic stabilization and modernization its priorities in this plan, using both austerity and privatization programs as a driving force. Many local food services firms were able to use this economic situation to their advantage to fortify their position in the domestic market in the absence of strong competition from imports.

There have been numerous and continual changes in Brazil's trade policies and programs that are resulting in a more open and competitive national economy. However, inflation has had a significant impact on the economy and has been volatile: almost 5000% in 1993, compared with 2.5% in 1998. In recent years, it has remained high yet stable at 9% in 1999 and is estimated to decrease to 6% in 2001.

Trade is becoming more open and has almost doubled since 1990. Brazil's debt to GDP ratio was 48% in 1999, which has helped to reassure investors of the strength of the Brazilian economy. Brazil's relatively strong currency has encouraged imports, which in turn are contributing to a growing trade deficit.

Brazil is Canada's largest trading partner in South America. Total foreign direct investment (FDI) in Brazil increased to \$42.2 billion in 1998 from \$24.9 billion in 1997. In spite of the economic downturn, FDI increased to over \$42.5 billion in 1999 and has climbed to over \$30 billion in 2000. After the United States and Britain, Brazil is Canada's third most important country in terms of foreign investment, with more than \$7 billion invested to date.

Key Factors Shaping Market Growth

The inflation fighting policies implemented by the Brazilian government have profoundly affected numerous sectors of the nation's economy, including food product processing. As is the case with most industries, overall economic growth is required to support and sustain growth in the food-processing industry.

Brazil is heading in that direction. However, growth in this industry will also be linked to two population-related factors. First, Brazil's population is increasing and requires more food; second, the country is becoming increasingly urbanized.

According to the Brazilian Food Processors Association (ABIA), the growth in the food-processing industry has been driven by increased demand. As result of increased purchasing power among Brazilian consumers and a continuing influx of foreign multinationals,

expansion in a number of segments has been robust in the last two years. These segments included:

- confectionery;
- animal protein;
- dairy;
- oils and fat;
- beverages;
- canned fruits and vegetables;
- concentrated fruit juices; and
- frozen products. ⁽³⁾

These food products also contributed to growth in the food-processing sector. The ABIA estimates that production has increased by 28% in the last six years. Sales have increased 39% over the same period.

Brazil is the world's third-largest producer of beer and local producers continue to invest in expansion to keep up with growing domestic demand, as well as exports. The country is also the second-largest producer of chocolates in the world. Demand for these products has attracted local investment by major players, like Italy's Ferrero Rocher, which switched from exporting to local production after only three years in the market.

Opportunities

The ABIA conducted research from 1994 to 1999 to evaluate the growth performance of a number of processed food products. The Association found that yogurt and soft drinks had the greatest sales growth: 90.8% and 88.4%, respectively. Beer, cheese and cookies all experienced growth over 50%, followed by poultry products (43.2%), pork products (33.3%) and other meat products (29.1%). Fish products, canned vegetables and juices and dehydrated foods grew between 5% and 8% during the same period. ⁽⁴⁾

While poultry products achieved significant growth, poultry meat faces barriers in the Brazilian market and Canadian firms should seek guidance (see **Key Contacts and Support Services**) if they are interested in opportunities in this segment.

The domestic demand for health foods and processed organic foods is growing in Brazil, as the country continues to be influenced by international trends. The United States, in particular, has a guiding effect on Brazilian consumer preferences. Demand for these products is increasing and there is evidence that Brazilian shoppers will pay a premium for them.

Canadian firms will want to monitor signs of growth in this area, as specialized niches such as health ingredients and organic ingredients become more mainstream. Organic farming is growing rapidly in the south and southeast regions of Brazil, but it is growing from a very small base. Whether the domestic suppliers can accommodate the

market remains to be seen. Imports in this segment are negligible at this time.

Flavours

According to the U.S. Department of Commerce, Brazilian food industry specialists estimated sales in the food flavours and ingredients segment to be 6-15% higher than it was in 1999. Many firms that specialize in the flavour segment recorded substantial growth in 2000, including Duas Rodas and French Givaudan. IFF, for example, recorded a 30% increase in sales between February and April 2000.⁽⁵⁾ As a result, IFF opened a new \$39 million plant in Taubate to take over much of the production from its Rio de Janeiro facility, which is now dedicated exclusively to fragrances.

Ingredients for Pasta

Pasta consumption in Brazil is on the rise, and consolidation among the producers has made this category competitive. Local producers continue to invest in new pasta types, using selected hard wheats, semolina, and eggs. Major processing companies in this sector include J. Macedo, Bauducco, Plus Vita, Cruzeiro do Sul and Lapa.⁽⁶⁾ Brazil is the largest wheat importer in the world, and its flour industry has been modernizing and expanding to address some of this demand for pasta.

Argentina has been one of Brazil's main foreign suppliers to date, supplying approximately 90% of Brazil's total consumption, particularly after the implementation of the Mercosul agreement. However, Canada has remained a strong supplier of wheat (other than Durum) used in food processing, exporting 133 430 tonnes in 2000.

Other Grains, Seeds Cereals

Canada has been one of Brazil's main suppliers of canary seed, exporting 19 570 tonnes in 2000. Argentina was the only nation that exported a greater amount (21 618 tonnes) than Canada. Canada also is a leading exporter of other cereals and malt (both roasted and unroasted) to Brazil.

Edible Oils

According to the U.S. Department of State, edible oils offer opportunities for suppliers of ingredients. Soybeans in particular may provide Canadian firms with export opportunities. Ceval, one of Brazil's largest food processors, is the largest soy processor in Latin America, with facilities across Brazil and Argentina. Ceval also produces vegetable oils, margarine, vegetable crèmes, as well as processed meats and grains.

Tomato Products

Concentrates, sauces and ketchup processing and production in Brazil

are growing, resulting in greater demand for tomatoes and tomato by-products. Sales in this industry are estimated at \$1.3 billion, as demand continues to increase. Brazil produces a large tomato crop for domestic use, estimated at 2.7 million tonnes in 2000.⁽⁷⁾ However, many farmers are harvesting more lucrative fruit crops on land that was traditionally used for tomatoes.

Traditionally, Brazilian tomato imports have been in the form of tomato paste for processing. While this preference continues, the market has also expanded to include ready-to-sell sauces. Chile is a major exporter of tomato paste and preserved and prepared tomatoes to Brazil. Other tomato products are imported from Venezuela (fresh or refrigerated tomatoes); the United States (ketchup); Italy (whole tomatoes or pieces, prepared or preserved, and tomato paste); and Peru (tomato paste).

Potato Products

Canada has not taken full advantage of export opportunities for potato products. While imports of potato flour, meal and powder diminished, Brazil imported 1495 tonnes of potato flakes, granules and pellets in 1999. These imports originated in a number of countries, including Germany, the United States, Spain and the Netherlands. Canadian firms would benefit from exploring opportunities in this segment of the market, as they have in exporting frozen potato products.

Ingredients for Frozen Foods

Frozen food is one of the fastest-growing markets in the world, with a 25% increase over the last five years. Frozen food consumers are mainly business women and single-person families.

Frozen food is eaten 3-4 times a week by 44% of consumers; 35% eat frozen food once a week, 18% have it twice a week and 3% have frozen food once every ten days. Brazilian per-capita consumption is around 750/800 g a year.

Brazil's large population gives the impression of a large consumer base, but only 15% of the population can afford luxury goods and processed foods. Household income is growing, but price and quality will continue to be a priority in expanding the consumer base. The Brazilian population is embracing frozen food products of all types, and ingredients for the processing of these products will be in greater demand. Areas of particular interest to Canadian exporters are meat products and fruit for ice creams. Major Brazilian players in the frozen food-processing industry include Kraft Lacta Suchard, Kibon, Sorvane, Nutrimental and Technovin.⁽⁸⁾

The southeastern region of Brazil, which includes the states of Rio de Janeiro and São Paulo, is the strongest market for processed foods in Brazil. Other regions are developing, particularly the Northeast, but initial market entry strategies should be focussed on the southeast.

The distribution system in Brazil for frozen food 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, which is believed will directly benefit the frozen food industry.

COMPETITIVE ENVIRONMENT

Local Capabilities

Brazil's food-processing industry is mature and thriving. In many ways, it was assisted by the currency devaluation in 1999. Food ingredients with imported content became much more expensive, resulting in the replacement of many imported products with domestic offerings. The food industry employs an estimated 800 000 people in over 45 000 companies; however the bulk of these companies are small- and medium-sized businesses. ⁽⁹⁾

According to the Brazilian Institute of Geography and Statistics, Brazil's food industry trails only the petroleum industry as the largest sector of the economy. The largest food processors in the local market include Brazilian companies, such as Perdigão, Sadia, Ceval Alimentos and Santista Alimentos, as well as foreign firms, such as Nestle, Danone, Parmalat and Cargill. The U.S. Department of Agriculture estimates that the revenues of the top ten food processing companies in Brazil represent 10% of the total market.

International Competition

The Mercosul trade agreement among Argentina, Brazil, Chile, Paraguay and Uruguay has put other exporters at a distinct disadvantage. Canadian firms will be challenged to find ways to compete on price alone. U.S. and European firms have also become firmly rooted in the Brazilian market. U.S. firms have benefited from their early entry strategies, product delivery capabilities (volume and diversity) and global interest in the "American brand." European firms have also taken advantage of their capabilities, as well as cultural and traditional linkages with Brazil.

Despite the stagnation of the food sector in many other markets, Brazil retains considerable appeal to many foreign firms.

Canadian Position

Canadian companies face a number of barriers with regard to the Brazilian market. Generally, Canadian companies and their products are not familiar to Brazilian buyers. Canadian firms will need to invest a considerable amount of time and energy to establish the level of comfort and familiarity required to access the food product processing market.

Additionally, recent negative media coverage in Canada regarding the ban on Brazilian beef may have spawned some discontent among Brazilian businesses toward Canadians. This incident, coupled with the growing public awareness of the two-year old Embraer-Bombardier dispute, has strained Canada-Brazil relations in recent months. Canadian firms are advised to seek local assistance from experienced professionals when developing their strategy to sell their products to potential Brazilian clients.

Competitive Advantage Through Canadian Government Policies and Initiatives

The Canadian federal government and the diverse provincial departments and agencies responsible for promoting the export of agricultural and food products offer assistance to Canadian firms in many ways. In the past, these agencies have organized and participated in trade missions and events to promote Canadian food products in the Brazilian market. They ensure a Canadian presence in numerous Brazilian and Latin American trade shows and offer support to Canadian food exhibitors attending these events.

Additionally, the Trade Commissioner Service of the Department of Foreign Affairs and International Trade provides a wealth of information in the form of reports and market insights. Trade Commissioners in Brazil are available to assist export-ready firms by providing advice, key business contacts and current market intelligence.

Canadian Commercial Corporation

The Canadian Commercial Corporation (CCC) gives 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. The CCC will also act as a prime contractor on behalf of Canadian small and medium-sized enterprises, giving those businesses increased credibility and competitive advantage.

Export Development Corporation

Export Development Corporation (EDC) offers export financing and insurance to Canadian exporters. Additionally, insurance can be provided for larger transactions that are subject to the terms and conditions established by the buyer. EDC prefers to work through letters of credit, bank credits or bank guarantees. Approval for financing is considered on a case-by-case basis.

EDC has designated Brazil as one of five priority markets.

Accordingly, EDC has opened an office in São Paulo to cover Brazil and other Mercosul countries.

Program for Export Market Development

The Program for Export Market Development (PEMD) helps Canadian companies enter new markets 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. Eligible costs and activities include market visits, trade fairs, incoming buyers, product testing for market certification, legal fees for international marketing agreements, transportation costs of offshore company trainees, product demonstration costs, promotional materials, and other costs necessary to execute a market development plan. Activity costs are shared on a pre-approved, 50/50 basis.

The PEMD refundable contribution ranges from \$5,000 to a maximum of \$50,000. Preference is given to companies with fewer than 100 employees for a firm in the manufacturing sector and 50 in the service industry, or with annual sales between \$250,000 and \$10 million. Other components of the program include international bid preparation (Capital Project Bidding) and, for trade associations, developing international marketing activities for their membership. For additional information visit <http://www.infoexport.gc.ca/pemd/menu-e.asp> or call 1-888-811-1119.

WIN Exports

WIN Exports, a database of Canadian exporters and their capabilities, is used by trade commissioners around the world and by Team Canada Inc partners in Canada to match Canadian suppliers with foreign business leads, and to share information on trade events. To register your company in WIN Exports or for more information, visit http://www.infoexport.gc.ca/winexports/home_e.html or call 1-888-811-1119.

MARKET LOGISTICS

Channels of Distribution

Direct Sales

Canadian firms looking to supply food ingredients to Brazilian food processors will find that few companies import products directly. While there are certainly advantages to contacting food-processing companies directly, and building solid business relationships, Canadian exporters will benefit from exploring opportunities for partnerships with local importers and suppliers.

Agents and Sales Representatives

A good agent or sales representative can be an invaluable resource in the Brazilian food industry. Enlisting the services of an experienced and competent agent will help Canadian firms better understand the regulatory, marketing, promotional, and business intricacies of the industry. Agents can be the best advisors with regard to trends and potential opportunities. Additional information on qualified agents may be available from the Canadian Embassy or Consulates in Brazil (see **Key Contacts and Support Services**).

Market-entry Considerations

Canadian suppliers of food ingredients will find market entry challenging. Canadian firms face distinct disadvantages in the form of established local and foreign competition, language and cultural barriers, cost issues and perhaps most significantly, a general lack of awareness among Brazilians of Canadian companies and their capabilities.

Overcoming these efforts requires a concerted and calculated effort on the part of Canadian firms. It is imperative that Canadian exporters make their presence known to potential customers in Brazil, through personal contact and attendance at trade shows and other industry events.

While the use of English is growing in the Brazilian business community, Canadian firms must make all of their relevant sales and promotional literature available in Portuguese. Portuguese-speaking representatives will also contribute to the image of the Canadian firm.

Suggested Business Practices

There are cultural differences between Canada and Brazil that businesses wishing to enter the market should become familiar with. For example, the pace of negotiations is slower and is likely to require more personal contact. Some Brazilian executives do not respond favourably to short visits made by foreign business representatives. As well, attention to after-sales service is typically a concern to Brazilian buyers.

Canadians are advised to be familiar with the Brazilian economic and commercial environment prior to attempting to conduct business within the country. Office hours are typically 8:30 a.m. to 5:30 p.m.; however, executives often begin work later and stay later. The duration of lunches is typically two hours.

Business travellers require temporary visas if they are going to conduct business such as signing legal documents, engage in financial or commercial transactions, or conduct research.

Holidays in Brazil include: New Year's Day (January 1), Carnival (four nights and three days prior to Ash Wednesday), Good Friday, Easter Sunday, Tiradentes Day (April 21), Labour Day (May 1), Corpus Christi (June 11), Independence Day (September 7), Elections Day (October 5), Nossa Senhora Aparecida (November 15), Immaculate Conception (December 8), and Christmas Day (December 25). There are also various state, federal, or religious holidays proclaimed, and Canadian exporters should schedule their activities to avoid holidays.

Import Regulations

Brazil participates in Mercosul (Mercosur in Spanish), a Latin American trade agreement with Argentina, Chile, Paraguay, and Uruguay that gives preference to goods from these countries, creating a trade barrier to Canadian firms. The Mercosul common external tariff was implemented on January 1, 1995 and ranges between zero and 23%, with some exemptions (recorded on each Mercosul member's national list).

The importing system in Brazil is computerized through the Sistema Integrado de Comércio Exterior (SISCOMEX), which reduces paper work for importers and customs brokers.

Commercial invoices are required by law to include the following information: date and place of shipment, markings and numerical order of packages, clear and exact descriptions of the goods, country where the goods originated, weight and prices plus shipping, insurance and other costs. The description of goods on the commercial invoice must also be written in Portuguese.

Local Standards, Certificates or Registrations

Phytosanitary and/or health and sanitary product certificates are required for food products entering the country. These documents must be notarized by a Brazilian Consulate in Canada and should accompany the certificate of origin.

Food products require advance registration with the appropriate ministry: Health Ministry or Agriculture Ministry. These registrations are typically issued within two weeks.

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

Payment can be made by traditional forms (e.g. letters of credit or bank transfers) with no restrictions. Advance payments for imports are limited to 20% of the total value; the balance is released after the arrival of the goods. Full advance payments are allowed only for imports up to \$6,500 freight on board (f.o.b.). Preferred forms of payment are bank transfer, cash against documents, and letters of

credit.

PROMOTIONAL EVENTS

Event/Description	Organizer
<p>Brasil Pan Expo Center Norte August 2001 International Exhibition and Conference on Technology for the Bakery and Confectionery Industries.</p>	<p>Miller Freeman do Brasil Ltd. Rua Wanderley 848-04011 -011 São Paulo, SP Brazil Tel.: (55-11) 3873-0081 Fax: (55-11) 3873-1912</p>
<p>ABRAS September 2001 Rio de Janeiro Processed Food show organized by the National Supermarkets Association.</p>	<p>Paulo Limas Canadian Consulate-São Paulo Tel.: (55-11) 5509-4321, ext. 3372 Fax: (55-11) 5509-4260 E-mail: paulo.limas@dfait-maeci.gc.ca</p>
<p>Sweet Brazil March 2002 (exact date and location to be determined in Fall 2001) São Paulo, Brazil International Chocolates, Cacao, Candies, and Confectionery Show.</p>	<p>Deutsche Messe AG Hannover Fairs do Brasil Av. Angelica, 672 conj. 182 - 01228-000 São Paulo, SP Brazil Tel.: (55-11) 3662-4692 Fax: (55-11) 3826-8175 E-mail: hanover@snet.com.br Internet: http://www.hanover.com.br Miller Freeman do Brasil Ltd. (as above)</p>
<p>Food Ingredients South America Expo Center Norte August 2002 International Exhibition on Food Ingredients, Product Development, and Quality Control.</p>	<p>Reed Exhibition Companies R. Sansao Alves dos Santos, 433 - 5 andar 04571-090, São Paulo, SP Brazil Tel.: (55-11) 5505-7272 Fax: (55-11) 5505-7872</p>
<p>FOODSERVICE and HOSPITALITY BRAZIL Riocentro August 2002 International Food service and Hospitality Exhibition.</p>	<p>AMM Feiras & Negócios Av. Nove de Julho, 5966 cj 31 01406-200 São Paulo, SP Brazil Tel.: (55-11) 3063-3205 Fax: (55-11) 3068-9472#</p>
<p>ABIA Food Service 2002 (date and location to be announced) São Paulo ABIA is the leading Brazilian food service industry event.</p>	<p>Alexandra Houde 300 Leo Pariseau St., Suite 100 PO Box 159, Succ. Place du Parc Montreal, QC H2W 2M9 Tel.: (514) 289-9669 Fax: (514) 289-1034 E-mail: ahoude@sial-montreal.com</p>
<p>SIAL Montreal March 4-6, 2003 Montreal Incoming mission of key Brazilian buyers to provide Canadian exporters with an opportunity to showcase their products.</p>	

KEY CONTACTS AND SUPPORT SERVICES

Canadian Government Contacts

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SES Av. das Nações, Lote 16

Canadian Commercial Corporation
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70410-900 Brasilia, DF Brazil
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 Fax: (55-61) 321-4529
 Contact: David Weiner, First Secretary
 (Commercial/Economic)
 E-mail: david.weiner@dfait-maeci.gc.ca
 Internet: <http://www.dfait-maeci.gc.ca/brazil>

Canadian Consulate General-Rio de Janeiro

Rua Lauro Muller 116, Rm. 2707
 Torre Rio Sul Botafogo
 22290-116 Rio de Janeiro, RJ Brazil
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 Fax: (55-21) 275-2195
 E-mail: rio@dfait-maeci.gc.ca
 Internet: <http://www.dfait-maeci.gc.ca/brazil/rio>

Canadian Consulate General-São Paulo

CENU -Torre Norte
 Av. das Nações Unidas, 12.901 16th andar
 04578-000 São Paulo, SP Brazil
 Tel.: (55-11) 5509-4321
 Fax: (55-11) 5509-4260
 Contact: Claude N. Fontaine, Senior Trade Commissioner
 E-mail: infocentre-spalo@dfait-maeci.gc.ca
 Internet: <http://www.canada.org.br>

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Sir John Carling Building
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Brazilian Government Contacts

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2000 Mansfield St.
 Montreal, QC H3A 3A5
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 E-mail: cescobar@edc-see.ca

Ministry of Agriculture (Ministério da Agricultura e do Abastecimentos)

Esplanada dos Ministérios
 Bloco D
 70043-00 Brasilia, DF Brasil
 Tel.: 0800 611995
 Fax: (55-61) 321-8360

Ministry of Health (Ministério da Saude)

Esplanada dos Ministérios
 Bloco G
 70058-900 Brasilia, DF Brasil
 Tel.: (55-61) 226-0640

Brazilian Consulate General-Toronto
77 Bloor St. West, Suite 1109
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Ministry of Foreign Affairs (MRE)

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Esplanada dos Ministerios
Palácio do Itamaraty
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**Secretariat of Foreign Trade
(SECEX-Secretaria de Comércio
Exterior)**

Department of Operations of Foreign
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Praça Pio X, 54
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20091-040 Rio de Janeiro, RJ Brazil
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Fax: (55-21) 216-0563

**Technical Department of Tariffs
(DTT)**

Av. Presidente Antonio Carlos, 375 11
andar
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Tel.: (55-21) 240-2548
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Industry Contacts

**Brazil-Canada Chamber of
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Canadian Council for the Americas

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E-mail: cca@ccacanada.com
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**Brazilian Association of Trading
Companies (ABECE)**

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 and Tourism Association (ABRESI)**

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 Internet: <http://www.abresi.com.br>

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----- *Brazil: Economic Trends and Outlook*, September 1999.

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----- *Brazil Food Processing/Packaging Machinery-MERCOSUL*, November 2000.

----- *Brazil: New Investments in the Food Industry*, November 2000.

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United States. Department of State: Bureau of Western Hemisphere Affairs. *Brazil-Background Notes*, July 2000.

OTHER REFERENCE MATERIAL

Useful Internet Sites

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

Bloomberg Latin America: <http://www.bloomberg.com/sa/sahome.html>

Brazil and Biz: <http://www.brazilbiz.com>

Brazil Business Development Program: <http://www.bbd.com.br>

Brazil Trade Net: <http://www.dpr.mre.gov.br> and
<http://www.braziltradenet.gov.br/e/usrenglish.htm>

Brazilian Central Bank: <http://www.bndes.gov.br>

Brazilian Institute of Geography and Economics: <http://www.ibge.gov.br>

Brazilian Ministry of External Relations: <http://www.ibge.gov.br>

Brazilian Ministry of Finance: <http://www.fazenda.gov.br>

Business News Americas: <http://www.bnamericas.com>

Canadian Consulate General in São Paulo: <http://www.dfait-maeci.gc.ca/brazil>

Exhibitions 'Round the World: <http://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://amhost.amcham.com.br/publicadep/inside/ibhis.htm>

International Development Research Centre (IDRC):
<http://www.idrc.ca/lacro/investigacion/mercosur.html>

Latin American Newsletters: <http://www.latinnews.com>

Latin Trade: <http://www.latintrade.com>

Ministry of Foreign Relations: <http://www.mre.gov.br>

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

Tradeport: <http://www.tradeport.org>

Tradeshaw Central: <http://www.tscentral.com>

U.S. Department of Agriculture: <http://www.fas.usda.gov>

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

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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 facsimile at (613) 943-8820. 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:

1. All monetary amounts are expressed in Canadian dollars, unless otherwise indicated. The conversion rate to Canadian dollars is based on IDD Information Services, *Tradeline*, July 2001.
2. All monetary amounts are expressed in Canadian dollars, unless otherwise indicated. The conversion rate to Canadian dollars is based on IDD Information Services, *Tradeline*, July 2001.
3. Source: U.S. Department of Agriculture/ABIA, 1999
4. Source: U.S. Department of Agriculture/ABIA, 2000
5. Source: STAT-USA, 2000
6. Source: STAT-USA, 2000
7. Source: U.S. Department of Agriculture, Foreign Agricultural Service, 2000
8. Source: STAT-USA, 1999
9. Source: U.S. Department of Agriculture, Foreign Agricultural Service, 2000

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