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SUBJECT: Brazilian Market for U.S. Winter Vegetables and Berries

REF: FAS 25073

1. The winter season for U.S. vegetables and berries coincides with the spring and summer months in most of Brazil, or the inseason for most of the products listed in paragraph four of FAS 25073. For this reason, The Office of Agricultural Affairs (OAA) believes there is a very limited market for non-speciality U.S. winter vegetables and berries. Based on observations at a few very upscale produce points of sale in Sao Paulo city, OAA staff have observed such speciality items as small peeled carrots in original U.S. consumer packages and fresh California strawberries which could fall into the category of U.S. winter produce. The OAA has also observed a supermarket advertisement in a local Manus newspaper about 15 months ago listing a number of U.S. fresh produce items. So yes there is a market, probably very limited, for certain speciality items or as in the case of Manus which is a distant market from the major specialized produce producing areas around Sao Paulo, Rio de Janeiro and other metropolitan areas of South Brazil. The wholesale produce market CEASA in Sao Paulo continues to dominate as the major price discovery market for fresh produce in Brazil.

In paragraph two we provide import data for 1996 to give an idea of the extent of the current market. We are not aware of any phytosanitary limitations on the products listed, however for fresh plant products an APHIS/USDA certificate is necessary. For further information on specific requirements check with APHIS/PPQ in Riverdale, MD.

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BRAZIL: IMPORTS OF SELECTED FRESH PRODUCE ITEMS, 1996

Code/Description	Quantity Metric tons	Value \$1000 FOB	U.S. Share of Quantity percent	
0702	tomatoes	972	141	0.1
0703.1	onions and shallots	3,985,427	38,118	0.01
0703.2	garlic	100,113	87,440	3
0704.1	cauliflower, broccoli	67	115	1
0704.2	brussel sprouts	5	12	--
0704.9	other cabbage	593	45	3
0705.11	head lettuce	18	26	27
0705.19	other lettuce	178	311	93
0705.21	endive, chicory	50	99	17
0705.29	other endive, chicory	151	388	9
0706.1	carrots	350	700	35
0706.9	beets, radishes	190	44	0.6
0707	cucumbers	3	3	--
0708.2	peas	8	11	--
0709.1	artichokes	50	67	10
0709.2	asparagus	68	174	20
0709.3	eggplants	3	3	0.9
0709.4	celery	48	43	--
0709.51	mushrooms	18	67	3
0709.6	peppers	53	9	0.3
0709.7	spinach	N/A	0.3	100
0709.9	other veks, nes	786	278	3
0810	Other fresh fruit:			
0810.1	strawberries	254	466	75
0810.2	raspberries	8	46	20
0810.3	currants	0.6	3	--
0810.4	blueberries	1.7	10	40
0810.9	persimon	126	158	8
0810.9	other fresh fruit	22,277	20,902	0.1

Source: Ministry of Finance

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3. Recommendation: For the time being we see limited opportunities for U.S. fresh winter vegetable exports to Brazil. Therefore we do not see any advantage with a short visit of an HTPD analyst and marketing specialist together with a trade team of U.S. growers and exporters. In addition to the limitations of the market due to relatively good domestic production and distribution of vegetables competing with U.S. supplies, the changes in import financing have taken away an interest spread which helped make it very attractive for imports of fresh produce or many other food products for which a similar domestic product was available or could be easily produced. For more information on these credit restrictions see BR7611 dated 4/4/97.

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