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Brazil

Kosher Foods

Report

2001

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Report Highlights:

The Brazilian Jewish Community is the seventh largest in the world and second in South America, after Argentina, with an estimated population of 130,000 families. They account for 85 percent of kosher food consumers. Ethnic groups and vegetarians account for the other 15 percent. Imports of Kosher foods increase during the Jewish holidays. The United States and Israel are the Brazilian main suppliers of Kosher Foods.

Includes PSD changes: No
Includes Trade Matrix: No
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MARKET OVERVIEW

Brazil's Jewish Community is the seventh largest in the world and the second largest in South America, after Argentina, with an estimated population of approximately 130,000 families. The majority of this community lives in the states of São Paulo and Rio de Janeiro. The remainder is found throughout the other major Brazilian cities, including Porto Alegre in the state of Rio Grande do Sul, Belo Horizonte in the state of Minas Gerais, Curitiba in the state of Paraná, and some northern cities.

The first significant Jewish migration to Brazil took place in 1904, to the state of Rio Grande do Sul in the Southern Region of Brazil. Rio Grande do Sul now is the location of the third largest Jewish community in the country. Later arrivals settled in the South-East Region, many in the former capital, Rio de Janeiro. After the capital moved to Brasilia in the Center-West Region, most of the Jewish community eventually moved to the state of São Paulo, which is the major business center in the country today. The size of the Jewish community has been stable in recent years and, according to some religious leaders, they do not expect it to grow significantly in the future.

Jewish Communities in Brazil	
São Paulo	70,000 families
Rio de Janeiro	6,300 families
Porto Alegre	2,000 families
Other cities	51,700 families

The Brazilian Jewish community includes the Jewish descendants of North African, Turkish, Egyptian, Lebanese, and other Middle Eastern Jews, collectively known as Sephardic, or "Sepcharadim" in Portuguese. Sephardic Jews are the largest group of Brazilian Jews, with about 2,500 families in the state of São Paulo alone. They are regular but not exclusive consumers of kosher foods.

A second, smaller group – the Ashkenazi Jews, or "Ashkenazim" in Portuguese – are descendants of German, Polish, Russian, and other European Jews. The most observant members of this group consume only kosher foods. They account for 85 percent of kosher food consumers in the Jewish community.

Members of the Reform Jewish community in Brazil are of different ancestries. In general, they do not consume kosher foods on a regular basis, but do make purchases during traditional festival and holiday periods.

Orthodox Jews – of either Ashkenazic or Sephardic descent are the main consumers of kosher foods. However, non-Orthodox Jews may also follow the "Kashrut" or kosher laws, either for religious or cultural tradition reasons. During certain Jewish celebrations, consumption of these products extends to the whole community.

The main religious events associated with an increase of kosher food consumption are Passover (or Pessach), Shavuot, Rosh Hashana, Yom Kippur, and Sukkoth. Although the dates of these holidays vary slightly from year to year, they always fall at the same general time. Importers, retailers, and the institutional market all handle kosher food in Brazil. However, estimating the total market size is difficult, since consumption is seasonal in nature, increasing during the Jewish holidays and remaining stable, but at a lower level, during non-holiday periods.

Jewish Holidays in 2000 and 2001

Holiday	2001	2002
Passover	April 8, Sunday	March 28, Thursday
Shavuot	May 28, Monday	May 17, Friday
Rosh Hashana	September 18, Tuesday	September 7, Friday
Yom Kippur	September 27, Thursday	September 18, Wednesday
Sukkoth	October 2, Tuesday	September 21, Saturday

Non-Jews account for 15 percent of kosher consumption. For example, other ethnic or religious groups such as the Lebanese, Syrians, and some Seventh Day Adventists are important markets for kosher products. Brazilians who are vegetarians purchase significant amounts of "parve" products – "pareve" in Portuguese, because of the assurance that this designation provides that neither meat nor dairy products are included in the product. Other consumers select kosher products for different reasons, including taste, cultural traditions, a reputation for high quality, or a perception of sanitary and quality assurance provided by the kosher certification.

Domestic Production of Kosher Products

Despite its small size, the kosher food sector has attracted some Brazilian food processors. Domestic producers see a clientele with high purchasing power and low price sensitivity.

Several local food processors have begun to manufacture kosher products, in separate production facilities from their mainstream foods. Local manufacture requires specialized equipment that has been carefully cleaned, or "koshered," to meet the Kashrut requirements. In general, locally manufactured kosher products are more price competitive than imported kosher products. Both imported and domestic kosher products can be found at local supermarkets and independent stores. The first Brazilian company involved in domestic kosher food processing was "Braskosher," located in São Paulo, which started operations in 1989. The main local kosher products manufacturers are:

Knorr	soups, seasonings, and spices
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Toscano	vinegar
Damm	seasonings and spices
Alcyon	canned tuna and sardines
Bauducco	cookies
Bela Vista	cookies
Hellmann's	mayonnaise
Romanhola	pasta
Santa Cecilia	wines

The Beit Lubavitch Congregation in Rio de Janeiro maintains a web site, which informs the Jewish community about the availability of approved kosher products. Lists of kosher certified-products are updated periodically, and can be found at www.BEITLUBAVITCH.org.br

A few importers deal exclusively with kosher products. These companies have been in the market for several years and have won the respect of Jewish organizations and entities (such as restaurants, catering services, supermarkets etc.) and individuals. Some mainstream importers also import kosher food, particularly for the Jewish holidays.

Certification Process

The Brazilian Orthodox Jewish community strictly observes kosher certification of foods. The community prefers certifications issued by the strictest Rabbinate and relies upon the rabbi who certified the product. Occasionally, disputes occur between certifying rabbis; a stricter rabbi might inspect and reject products certified by a less strict rabbi. The rejected products are then stigmatized as "non-kosher" and may not sell. In the past, entire batches have been rejected and importers have lost shipments. Brazilian Jews often have very close relationships with their rabbis who are consulted by consumers and merchants about suppliers, and who provide recommendations about manufacturers of kosher food, when further information is needed (type of certification, certifying Rabbi, ingredients, etc.).

All United States kosher certifications are accepted in Brazil. Acceptance of a particular certification varies with the individual consumer and with the various market segments. The "OU" (U inside the O) – Union of Orthodox Jewish Congregations – is the most familiar among consumers. Strict supervision adds to the status of the products.

The recent devaluation of the Brazilian currency, the "Real" (symbol = R\$), has caused a slight decline in imports and consumption of imported goods and increases in local prices (exchange rate is currently US\$1 to R\$2.6). Food mixes and prepared foods have been most affected. Local contacts believe that despite of the devaluation of the Real, there is still room for growth in the kosher import market. Kosher food is mostly consumed by a market segment of the population with higher purchasing power that is likely to maintain consumption patterns for

religious reasons, making these consumers less price sensitive than the overall population. In addition, local kosher food production is limited, leaving consumers with little choice. Lack of variety is the most frequent complaint about kosher foods in the local Jewish community, whose members sometimes bring products back from trips to Israel or the United States.

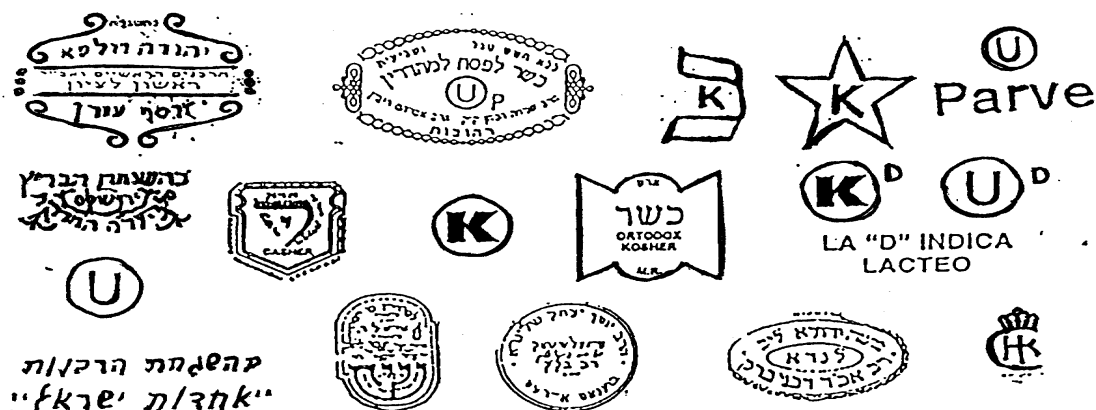
Most imported kosher food products marketed in Brazil are sourced from the United States and Israel. According to importers, prices in Israel are lower but a larger variety of products can be found in the United States. Imports from Israel often come through the United States (The Brazilian importer buys the product from a United States supplier or distributor and sells it in Brazil), since there is no import duty for such products entering the United States from Israel.

Based on the imported and domestic kosher products which are available, and according to some local contacts, current kosher food consumer preferences include: fruit juices, red and white wines, sparkling wines, gefilte fish, matzos for Passover, soups, fish balls, seasonings, ketchup, mustard, jellies, cookies, chocolates, gums, candies, canned tuna fish, mayonnaise, and pie dough. The main United States kosher food brands marketed in Brazil are Manischewitz, Tampree, and Kedem. The main brands imported from Israel are Osem and Kedem.

According to some local contacts, locally produced kosher wines are too sweet and several preferred kosher wines are from California. There are significant opportunities for exports of kosher champagne and dry red and white wines to Brazil, which are difficult to find in local market. Other accepted alcoholic beverages are Tequila, light-colored rum, United States beer (especially light beers), and vodkas.

The local Jewish community strictly observes to the laws of Kashrut when purchasing meat and meat products. Slaughter operations must be under the supervision of a rabbi and employ kosher-trained staff. Meats are supplied mainly by the local market, or imported from Argentina, due to its close proximity to Brazil. There is a significant Jewish community in Buenos Aires, which guarantees a supply of appropriately prepared products. In addition, imports from Argentina have the advantages of being fresher, and are assessed low or no import duties, because Argentina is one of Brazil's MERCOSUR partners. Although kosher meats from the United States are preferred among some Jews because its preparation is considered well supervised, imports of meats from the United States are small, since local importers tend to avoid purchasing perishable products from the United States, due to the lengthy shipping transit time (about 60 days) from order to arrival in stores. Rib steaks, rib roasts, and vacuum-packed meat are valuable kosher products which are not found in Brazil, and represent a potential market for United States exporters. Frozen and smoked cuts (including salami, pastrami, and corned beef), smoked salmon, beef bologna, and most types of frozen meats and dairy products (frozen whipped cream, butter and cheese), seem to be well accepted by Brazilian kosher food consumers, and offer potential export opportunities.

Following are some of the most accepted kosher certification symbols:

**R**

etail and Institutional Sales

Development of the local kosher industry has led to increased competition at the retail and wholesale levels. However, the Brazilian Government is imposing some new regulations for imports of all food products (i.e. label registration, plant registration, product registrations fees for each product to be marketed (imported and domestically produced) which must be paid by the Brazilian importer. (Please see Packaging and Labeling section below for more information.) These changes increase the cost of imports. As a result, some small importers are now buying their products from major importers. The number of importers of kosher products is limited and mostly concentrated in the state of São Paulo. Usually, Brazilian kosher importers seek exclusive distribution rights from exporters. Trade reports indicated that changing importers may be difficult once a relationship is established.

United States kosher food exporters may find it difficult to sell large quantities, unless they educate their consumers by alerting non-kosher consumers to the quality and safety assurance provided by the kosher certification symbols. Contacts recommended consideration of such marketing strategies.

Kosher foods and ingredients can be found at independent stores located near Jewish communities and in some kosher delicatessen shops, mainly in São Paulo, Rio de Janeiro, and Porto Alegre (state of Rio Grande do Sul). Kosher products are also sold at a few supermarket chains, in special kosher sections. One of the largest Brazilian supermarket chains, Pão de Açúcar, has a section for kosher food and imports these products through an exclusive importer, who guarantees Pão de Açúcar the marketing rights to those specific products.

The institutional market in Brazil is growing and supplied mainly by a few kosher food producers located in the state of São Paulo, who also sell to airline companies, including United Airlines, American Airlines, Varig, and others; hospitals; and catering services known as "buffets."

Kosher restaurants and food service can be found at local Jewish schools, clubs, congregations, and Jewish athletic clubs. There are no firm figures for the number of kosher restaurants in

Brazil, but the Jewish Congregation estimates there are 10-15 kosher food service organizations in Brazil. Kosher food is generally not included as a feature of specialized cuisines, because of limited availability of kosher ingredients and, as contacts say, because it has not proven cost-effective.

For information about kosher-certified restaurants, catering services, and hotels, a local Jewish Congregation maintains food service lists on its web site at www.BEITLUBAVITCH.org.br

Import Duties and Other Taxes

Brazil treats kosher food items as ordinary imports, for customs duty purposes. Below are some import duties assessed on frequently purchased food products.

Meats: bone-in	12.5 %
Meats: boneless	14.5 %
Fish and seafood (fresh, chilled, and frozen)	12.5 %
Canned seafood	18.5 %
Gums	22.5 %
Non-chocolate candies	22.5 %
Chocolates	22.5 %
Baby foods	16.5% - 20.5 %
Cookies and biscuits	20.5 %
Pastry	20.5%
Jellies, fruit and vegetable	16.5 %
Juices	16.5 %
Beer	22.5 %
Wine	22.5 %
Vodka	22.5 %
Rum	22.5 %

Brokerage expenses and other local taxes must be considered. The state value-added tax "Imposto sobre Mercadorias e Serviços" or "ICMS" which varies from 18 to 25 percent in the state of São Paulo, must also be considered. Another tax which is applied to some of the above

products is the industrialized products tax "Imposto sobre Produtos Industrializados" or "IPI" which is 15 percent. Importers report that storage costs at ports run about 25 to 27 percent of freight cost.

Shipping Recommendations

Kosher products should be shipped to Brazil well in advance of targeted holiday sales dates in order to clear Brazilian customs and enable brokerage and transportation processes to be completed in time for final distribution. Local importers report that an average of 60 to 70 days is needed from ordering to availability for distribution. This time frame should be observed when products are shipped for Jewish holidays.

Packaging and Labeling

Retail packed foods from the United States and from the European Union are popular among Brazilian kosher food consumers. Small packs are preferred, due to the relative higher prices of imports.

According to the Brazilian Consumer Protection Law 8078 of September, 1990, all food and beverages must provide the consumer with correct, precise, clear and easily readable information about the product in Portuguese. The Brazilian importer is responsible for the label translation and registration.

Imports of wine, beer, and distilled spirits as well as animal origin products (meats, seafood and dairy products) must be made only by a Brazilian company registered with the Brazilian Ministry of Agriculture, Livestock and Food Supply (MAPA). All unprocessed products of plant origin (fresh fruits, nuts, bulk products, dry fruit, etc.) must be accompanied by a USDA/Animal and Plant Health Inspection Service (APHIS)/Plant Protection Quarantine (PPQ) Phytosanitary Certificate. Frozen fruits and vegetables do not need phytosanitary certificates.

Brazilian regulations require imported United States products such as beef, other meats, seafood and dairy products to originate from a processing plant supervised by a federal agency of the United States Government, either USDA/Food Safety and Inspection Service (FSIS) for meat and poultry, USDA/Agricultural Marketing Service (AMS) for dairy, or the United States Department of Commerce/National Marine Fisheries Service (USDOC/NMFS) for seafood; which is then registered with MAPA. In the past, these registrations were handled by the USDA/Foreign Agricultural Service office at the United States Embassy in Brasilia. However, MAPA is revising registration procedures, which are not yet public.

For more detailed information on label and plant registration as well as on Brazilian import policy and regulations, please check the "Food and Agricultural Import Regulations and Standards - FAIRS", Report number BR1615 Report, available on the FAS homepage: www.fas.usda.gov.

Promotion

USDA contacts recommended promotion of kosher imports be planned and carried out in partnership with Jewish federations and congregations such as "Beit Chabad" and "Beit Lubavitch". Most of these organizations have Internet home pages, with sections on kosher food. Magazines whose main readers are Jews, such as "O Hebreu", are also excellent media for the promotion of consumer-ready products. These magazines usually publish ads on imported kosher wines, other beverages, and food products. Community leaders and importers encouraged companies planning promotions to develop a relationship with local religious leaders, to which they attribute the success of products such as kosher Coca-Cola.

For information on these congregations and magazines, please see the next section of this report, Key Contacts.

Key Contacts

Brazilian Importers

1. ALBEE COMERCIAL E IMPORTADORA LTDA.

Alameda Ribeiro da Silva , 793

Campos Eliseos

01217-010 São Paulo - SP

Tel.: (55 11) 3661-3377

Fax: (55 11) 3825-5271

2. KARIS IMPORTS

Rua Matteo Forte, 259

Lapa

05038-160 São Paulo - SP

Tel.: (55 11) 3611-4200

Fax: (55 11) 3611-5915

3. CASA SANTA LUZIA

Alameda Lorena, 1471

01424-001 São Paulo - SP

Tel.: (55 11) 3082-4949

Fax: (55 11) 3088-0663

E-mail: santaluzia@originet.com.br

Web: www.santaluzia.com.br

4. CASA ZILANA

Rua Itambé, 506

01239-000 São Paulo - SP

Tel./Fax: (55 11) 257-8671

Fax: (55 11) 259-5632

5. GOURMAND ALIMENTOS

Rua Funchal, 538 - 15th floor

Vila Olimpia

04551-060 São Paulo - SP

Tel/Fax: (55 11) 3842-5050

E-mail: gourmand@totalwork.com.br

6. CIA. BRASILEIRA DE DISTRIBUIÇÃO (Pão de Açúcar)

Rua Brigadeiro Luiz Antonio, 3126

01401-001 São Paulo - SP

Tel.:(55 11) 3886-0736

Fax: (55 11) 3884-2677

7. PICK IMPORTAÇÃO, EXPORTAÇÃO E COMERCIO, LTDA.

Rua Afonso Brás, 644

04511-001 São Paulo - SP

Tel.: (55 11) 3834-9588

Fax: (55 11) 3834-8787

8. EXPAND IMPORTADORA E EXPORTADORA LTDA.

Rod. Raposo Tavares, Km. 26½

Moinho Velho

Cotia

05577-900 São Paulo - SP

Tel.: (55 11) 4613-3300

Fax: (55 11) 4612-9033

9. ADIMEL COMERCIAL E IMPORTADORA LTDA.

Av. São Luiz, 112 - 13o andar

01046-906 São Paulo - SP

Tel.: (55 11) 259-5499

Fax: (55 11) 259-5855

10. FRANCO SUISSA IMPORTADORA E EXPORTADORA

Rua Machado Bittencourt, 392

04044-001 São Paulo - SP

Tel.: (55 11) 5549-7599

Fax:(55 11) 5549-0306

11.AURORA INDUSTRIAL E COMERCIAL LTDA

Rua Funchal, 449

04551-060 São Paulo - SP

Tel.: (55 11) 3845-2288

Fax: (55 11) 3845-2735

12. ALL KOSHER

Alameda Barros, 391 - Loja 12
Higienópolis
São Paulo - SP
Tel/Fax: (55 11) 3825-1131

13. KOSHER HOUSE

Rua Anita Garibaldi, 37 - Loja A
Copacabana
22041-080 Rio de Janeiro - RJ
Tel./Fax: (55 21) 2255-3891

14. GINSENG

Rua Marques de Sao Vicente, 124
Gavea Trade Center
Gavea
22451-040 Rio de Janeiro - RJ
Tel.: (55 21) 2511-5847
Fax: (55 21) 2540-6494

15. WAL-MART

Rua James Holland, 668
São Paulo - SP
Tel.: (55 11) 6915-3700
Fax: (55 11) 6915-3761

Restaurants and Food Services ("Buffets")

1. KOSHER MEAL RESTAURANT

Rua da Consolação, 3679
São Paulo - SP
Tel.: (55 11) 3063-1293
Fax: (55 11) 3061-9897

2. KOSHER PIZZA & RESTAURANT

Rua Pe. João Manoel, 801
São Paulo - SP
Tel.: (55 11) 0800-114-666

3. BEIT CHINUCH RESTAURANT

Rua Pe. João Manoel, 727
São Paulo - SP
Tel.: (55 11) 3088-5111

4.. BUFFET FRANÇA

Av. Angélica, 750
São Paulo - SP
Tel.: (55 11) 3662-6111
Fax: (55 11) 3662-6222

5. INTERCONTINENTAL HOTEL

Alameda Santos, 1123
São Paulo - SP
Tel.: (55 11) 3179-2611
Fax: (55 11) 3179-2619

6. BARILAN SCHOOL

Rua Pompeu Loreiro, 48
Copacabana
Rio de Janeiro - RJ
Tel.: (55 21) 2235-3110

7. SHERATON HOTEL

Av. Niemayer, 121
Rio de Janeiro - RJ
Tel.: (55 21) 2274-1122
Fax: (55 21) 2239-5643

8. THE KOSHER DELLI

Rua da Consolação, 3679
São Paulo - SP
Tel.: (55 11) 3086-1058

9. MAZAL TOV BUFFET

Rua Peixoto Gomide, 1724
São Paulo - SP
Tel.: (55 11) 3083-7614 / 3064-5208

10. BUFFET MOSAICO

Rua Hungria, 1000
São Paulo - SP
Tel.: (55 11) 3818-8831 / 3818-8834
Fax: (55 11) 3815-6980

11. BUFFET CHARLOT

Av. João Dias, 266
São Paulo - SP
Tel.: (55 11) 5523-7788
Fax: (55 11) 5521-9663

12. BUFFET MENORA

Rua Maranhão, 404
Higienópolis
São Paulo - SP
Tel.: (55 11) 3825-3422
Fax: (55 11) 3826-8883

13. BUFFET FRANÇA
Av. Angelica, 750/752
São Paulo - SP
Tel.: (55 11) 3662-6111 / 3662-6222

Jewish Entities, Associations and Congregations (São Paulo, Rio de Janeiro, Brasilia)

1. FEDERAÇÃO ISRAELITA DO ESTADO DE SÃO PAULO
(Israeli Federation of the State of São Paulo)
Rua dos Pinheiros, 498 - 5o andar
Tel.: (55 11) 3088-0111
Fax: (55 11) 3082-5785

2. EMBASSY OF ISRAEL
SES - Av. das Nações, Qd. 809 - Lote 38
70424-900 Brasília - DF
Tel.: (55 61) 244-7675
Fax: (55 61) 244-6129

3. CONSULATE GENERAL OF ISRAEL
Av. Brigadeiro Faria Lima, 1713
01452-001 São Paulo - SP
Tel.: (55 11) 3815-7788
Fax: (55 11) 3815-7293

4. CONGREGAÇÃO ISRAELITA PAULISTA - Rabbi Henry Sobel
(Israeli Congregation of the State of São Paulo)
Rua Antonio Carlos, 633
01309-011 São Paulo - SP
Tel.: (55 11) 256-7811
Fax: (55 11) 257-1446

5. CONFEDERAÇÃO ISRAELITA DO BRASIL
(The Brazilian Israeli Confederation)
Rua da Consolação, 22/23 - 8th floor
01301-100 São Paulo - SP
Tel.: (55 11) 3063-2852
Fax: (55 11) 3063-2854

6. O HEBREU Magazine

Rua Cunha Gago, 158
05421-000 São Paulo - SP
Tel/Fax: (55 11) 3819-2283

7. BEIT LUBAVITCH
Av. Visconde de Albuquerque, 685
Leblon
22450-001 Rio de Janeiro - RJ
Tel./Fax: (55 21) 2294-3138
E-mail: beuthner@openlink.com.br
Web: www.BEITLUBAVITCH.org.br

8. BEIT CHABAD (State of São Paulo)
Rua Russia, 195
01448-040 São Paulo - SP
Tel./Fax: (55 11) 3082-0576

Other States

1. BEIT CHABAD (State of Parana)
Rua Alferes Angelo Sampaio, 370
80250-120 Curitiba - PR
Tel.: (55 41) 242-6414
Fax: (55 41) 244-8266

2. BEIT CHABAD (State of Rio Grande do Sul)
Rua Schiller, 1055
90430-150 Porto Alegre - RS
Tel./Fax: (55 51) 335-1264
E-mail: beit.chabad@jewishmail.com

3. BEIT CHABAD (State of Minas Gerais)
Rua Timbiras, 501
30140-060 Belo Horizonte - MG
Tel.: (55 31) 273-7772 Fax: (55 31) 261-7550
E-mail: chabad@globalsite.com.br

4. BEIT CHABAD (Brasilia - D.F.)
SHIS QI 05 - Conj.8 - Casa 21
71615-080 Brasília - D.F.
Tel./Fax: (55 61) 248-3172
E-mail: chabadbrasil@persocom.com.br

5. BEIT CHABAD (State of Pernambuco)
Rua Jorge Couceiro da Costa Eiras, 603
51021-300 Recife - PE

E-mail: bcrecife@elogica.com.br

Brazilian Government

1. Ministry of Agriculture and Food Supply - MAPA
Agriculture (Animal and Plant Health, and Food Safety Inspection) Defense Agency - SDA
Animal Origin Products Inspection Service - DIPOA
Esplanada dos Ministérios, Bloco D - Anexo A - sala 431
70043-900 Brasília - DF
Tel.: (55 61) 218-2684
Fax: (55 61) 218-2672
Web: www.minag.gov.br

2. Ministry of Agriculture and Food Supply - MAPA
International Commerce Department - DCI
Animal Origin Products Inspection Service - DIPOA
Esplanada dos Ministérios, Bloco D - Anexo A - sala
70043-900 Brasília - DF
Tel.: (55 61) 218-2339
Fax: (55 61) 226-9850
Web: www.minag.gov.br

USDA/FAS Offices in Brazil

Office of Agricultural Affairs - OAA
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SES - Av. das Nações - Quadra 801 - Lote 03
70403-900 Brasília - DF
Tel.: (55 61) 226-3159
Fax: (55 61) 226-6784
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Agricultural Counselor - William W. Westman

Agricultural Trade Office - ATO/SP
Alameda Santos, 2224
Edifício Suarez Trade, Conj. 11
01418-200 São Paulo - SP
Tel.: (55 11) 3082-3528
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E-mail: ATOSaoPaulo@fas.usda.gov
ATO Director - Marcus Lower

