Overseas Market Introduction Service

First Activity for

Seafish

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1. Overview

1.1. Workplan

Through this OMIS project the UKTI team in Brasilia will:

Provide a UK Seafood Export Profile for Brazil, using those written for other countries as a reference for the report layout, and including trade tariff and regulation information relevant to Brazilian imports of seafood products.

1.2. Methodology

The research for this report was largely based on desk research. We have researched official statistics from the Brazilian Government and other studies concerning consumption and the seafood market in Brazil.

2. Market Report

2.1. Matching Profile

2.1.1. Trade Environment

- The Brazilian middle-class is expanding quickly; as of 2012, 53% of Brazil's population (104 million people) has been classified as middle class. In the last ten years, 38 million people ascended to the middle-class, and the percentage is expected to continue growing.
- The world's 6th largest economy, Brazil is considered one of the world's fastest growing emerging markets. Brazil's GDP grew an average of 3.8% per year from 2002 to 2011 and 2.7% in 2011.
- In 2011, Brazil's trade volume totalled U$ 398 billion with the main trade partners being China (16.09% of the total value), USA (12.14%) and Argentina (8.22%). The UK was ranked as Brazil's 14th largest trade partner, participating with 1.75% of the total value.
- Politically, Brazil has been governed since 2002 by the Worker's Party (PT). Under PT, Brazil projected itself as a global player and trader: its exports grew 323% in the past decade, while imports increased by 379%.
- Between 2007 and 2011 the annual inflation rate varied between around 4% and 6%, amounting to 5.53% in 2012. The unemployment rate has steadily fallen from 9.3% in 2007 to 6% in 2011.

2.1.2 The Seafood Sector

- According to FAO, Brazil's total fishery production in 2009 reached 1,240,813 tonnes, representing 0.86% of the world's total production. In this context, Brazil occupied the 18th position in the world ranking of largest fish producers.
  Trade Balance
- The Brazilian Trade Balance of fish products is negative both in volume and value. There was a significant increase of imports between 2009 and 2010, surpassing US$ 1 billion.

Brazilian Trade Balance of Fish Products in 2009 and 2010						
Trade Balance	**Exports**		**Imports**		**Balance**	
	US$	**Kg**	**US$**	**Kg**	**US$**	**Kg**
2009	247,082,086	42,242,223	722,568,296	245,345,104	-475,486,210	-203,102,881
2010	263,324,066	38,204,440	1,011,589,911	285,591,554	-748,265,845	-247,387,144

Source: Brazilian Ministry of Fishery and Aquaculture (MPA) / Brazilian Ministry of Development, Industry and Foreign Trade (MDIC)

Export Destinations

- The USA is the lead destination for Brazilian exports of seafood, leading by a significant margin from the 2nd and 3rd largest destinations, Spain and France.

Top Destinations to Brazilian seafood products				
Country	**2009**		**2010**	
	US$	**Kg**	**US$**	**Kg**
USA	72,887,602	7,134,421	109,219,507	8,328,804
Spain	21,182,287	4,727,954	19,465,169	5,424,062
France	29,000,483	6,321,888	17,734,454	2,896,656
Hong Kong	12,683,342	913,953	14,688,759	1,110,561
Netherlands	8,717,6177	746,269	11,877,729	883,425

Source: MPA/MDIC

Production and consumption

National Production and Per Capita consumption of fish in Brazil				
Year	**Brazilian Population**	**National Production (kg)**	**Total consumed (kg)**	***Per Capita* consumption (kg)/year**
2010	190,732,694	1,264,764,913	1,859,006,640	9.75
2005	181,341,499	1,009,073,000	1,207,085,449	6.66
2000	170,143,121	843,376,500	1,142,107,510	6.71
1996	161,247,046	693,172,500	1,228,437,410	7.62

Source: MPA/MDIC

- There has been a significant increase in per capita fish consumption (27.9%) in the past 14 years, although the trend is not linear. Meanwhile, national production almost doubled in the same period, with an average growth of 5.9%/year. The annual per capita fish consumption in Brazil is still below the 12kg recommended by the World Health Organization (WHO).
- In 2010, 66% of the fish consumed in Brazil was of national origin, with 34% being imported. In 2005, 74% of the national consumption was of national origin, while imports participated with 26%.

Imports by category

Fishery Imports by category and average price						
Category	**2009**			**2010**		
	US$	**Kg**	**US$/ Kg**	**US$**	**Kg**	**US$/ Kg**
Frozen Fish	134,824,518	86,184,736	1.56	162,480,801	82,868,713	1.96
Crustaceans	710,334	111,388	6.38	752,412	40,363	18.64
Fresh Fish	144,137,023	33,986,715	4.24	203,369,989	34,427,465	5.91
Dried/Smoked Fish	214,318,216	38,175,240	5.61	305,918,652	47,880,277	6.39
Molluscs	8,768,708	4,144,933	2.12	16,108,512	4,694,556	3.43
Frozen Fish Fillets	183,122,970	67,242,656	2.72	265,806,449	93,847,278	2.83
Canned	26,396,158	9,330,446	2.83	44,888,176	16,036,016	2.80
Others	10,290,369	6,168,990	1.67	12,264,920	5,793,886	2.12
Total	**722,568,296**	**245,345,104**	**2.95**	**1,011,589,911**	**285,591,554**	**3.54**

Source: MPA/MDIC

Imports by species

- The main seafood species imported by Brazil in 2010 was cod, mainly from Portugal and Norway. Other species imported in high quantities included salmon, hake, sardine and blue shark.

Brazilian Seafood Imports by Species,Value and Origins			
Species	**Main origins**	**2010**	
		US$	**Kg**
Cod	Norway and Portugal	292,265,180	43,393,097
Salmon	Chile	185,875,417	28,492,571
Hake	Argentina	118,588,489	43,506,250
Sardines	Morocco	30,032,683	31,711,464
Blue Sharks	Uruguay	33,592,134	31,711,464

Source: MPA/MDIC

2.1.3 Consumer Trends

- Fish consumption in Brazil is low compared to the national consumption of red meat and poultry. While an average Brazilian consumes 9kg of fish annually, the same person eats 23kg of red meat and 13.3kg of poultry.
- Even though fish consumption is expanding, only 6.4% of Brazilians eat fish on a regular basis. Fish consumption is higher in the Northern Region of Brazil (21% of total food consumption), although it relies heavily on fresh water species, abundant in the Amazon's rivers.
- Recently, seafood consumption (especially salmon) has been spread by the expansion and popularization of Japanese cuisine/sushi bars. Japanese food businesses grew 700% in the past decade and are increasingly part of higher-classes' eating habits.
- To some extent, seasonal seafood consumption is related to Christian traditions, boosting fish consumption during Christmas and Easter periods. Due to Portuguese influence in Brazilian history and culture, it is traditional to consume cod on those dates, when red meat should not be eaten, according to the tradition.

2.1.4 UK Share and Export Opportunities

- Chile was the leading supplier of fisheries to Brazil in 2011, maintaining the considerable growth in the past few years. Chile mainly supplies salmon, although it has been increasing its trout exports to Brazil.
- China has presented an astonishing growth in fish exports to Brazil: Brazilian fishery imports from China have increased almost ten-fold in the past 3 years. The rapid expansion has called attention from the international media, which reported that Brazilian fishing companies were complaining because they could not compete with low-cost Chinese products.
- UK share in the Brazilian market is very low, ranking far behind the main suppliers. On the other hand, as the share of imported seafood is relatively high in Brazil and the per capita consumption of fish is on the rise, the UK may find export opportunities in Brazil. A successful example is the Netherlands, who ascended from a non-supplier in 2010 into a significant provider in the following year, with positive prospects for 2012.

Imports of fishes and crustaceans to Brazil by country, value and volume

Rank	Country	2010		2011		Variation (%)	
		US$	Kg	US$	Kg	US$	Kg
1st	Chile	254,200,208	41,019,206	282,323,894	47,015,459	11.1%	14.6%
2th	China	96,980,332	33,339,691	231,844,271	79,703,831	139%	139%
3rd	Norway	217,114,991	34,902,893	221,136,765	33,072,749	1.8%	5.2%
4th	Argentina	162,298,003	60,872,538	153,054,304	49,580,219	5.7%	18.6%
5th	Portugal	86,535,733	12,019,557	113,513,773	17,250,695	31.1%	43.5%
6th	Uruguay	52,499,123	23,184,151	36,136,071	13,912,582	31.1%	40%
7th	Morocco	30,185,750	32,055,748	12,656,503	12,488,978	58.1%	61%

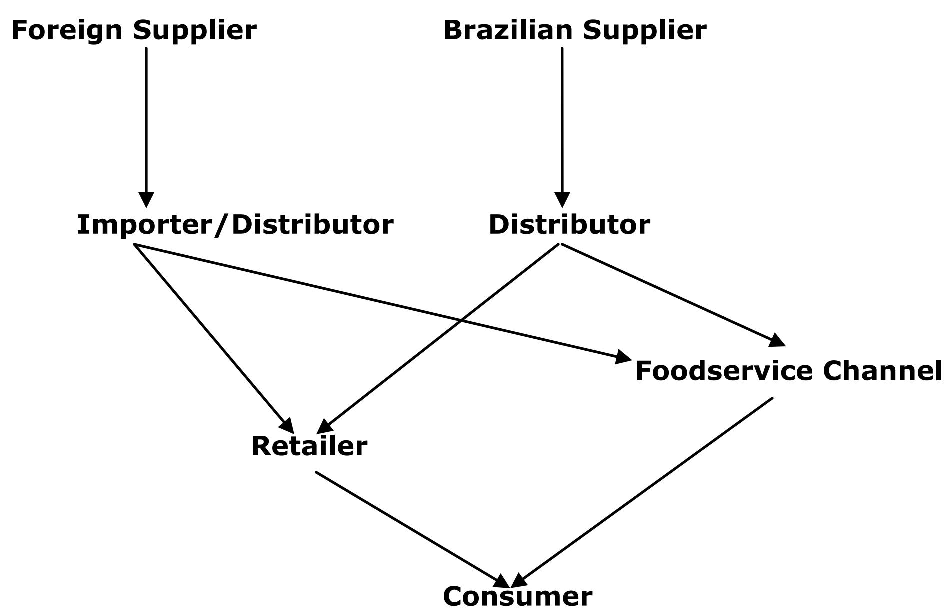
8th	Spain	9,168,215	4,296,143	11,903,420	4,264,511	29.8%	0.7%
9th	Netherlands	0	0	7,744,295	12,077,328	--	--
10th	Peru	3,185,976	1,387,569	6,619,732	3,424,760	107.8%	146.8%
Not ranked	UK	133,499	13,629	267,713	17,150	100.5%	25.8%

Source: MDIC

2.2. Doing Business Profile

2.2.1. The Supply Structure

- Exports to Brazil are normally internalized through importers that ditribute the products to retailers and foodservice channels.



2.2.2 The Retail Channel

- Recent research found that when choosing where to buy groceries, the main factor taken into account by the Brazilian consumer is the convenience of the store, rather than the price of the products.
- Besides the nation-wide retail chains, there are many regional and/or state retail chains of significant size. This is partially due to Brazil's enormous geographical dimensions.

Company	**Pão de Açúcar**	**Carrefour**	**Walmart**	**Makro**
Annual Turnover	£ 14.1 billion	£ 8.6 billion	£ 7.0 billion	£ 1.7 billion
Market Share	18.0%	11.0%	8.9%	2.2%
Subsidiaries	Pão de Açúcar, Ponto Frio, Casas Bahia, Extra, Assai, Compre Bem, Sendas	Carrefour, Atacadão, Dia%, Carrefour Bairro, Carrefour Express	Walmart, Big, Sam's Club, Mercadorama, Nacional, Maxi Atacadao	Makro
Number of stores/employees	1,571/149,070, distributed in 20 of Brazil's 27 states	500/70,000, distributed in 14 of Brazil's 27 states	521/81,504, distributed in 19 of Brazil's 27 states	76/8,537, distributed in 25 of Brazil's 27 states.
Web	www.grupopaodeacucar.com.br	www.carrefour.com.br	www.walmart.com.br	www.makro.com.br
Observations	Recently acquired by Groupe Casino (France)			

Source: IBEVAR/EXAME, 2012.

2.2.3 The Foodservice Channel

- The average Brazilian spends 13% of his annual expenditure on fish outside of his household. Eating out share increases substantially in higher income families.

- ABIA (Brazilian Association for the Food Industry) confirms that the value of the food industry for food consumed outside of the home increased from R$183 billion in 2010 to R$215 billion in 2011, an increase of 18%. This trend is likely to continue due to an increase in incomes, in the number of women entering the workforce, and the increased difficulty of locomotion between work and home.

- 26% of Brazilians eat out every day (as compared to around 50% in the USA) and food sold in restaurants 'by the Kilo' is very popular due to the quality and because each consumer can choose the quantity of food that he/she wants.

- In recent years, The Brazilian Federal Government has promoted a "Fish Week", in order to stimulate fish consumption around the country. During the above mentioned week, gastronomic events related to fish are promoted around the country and government circulates internet and television advertising encouraging the population to consume more fish, be it inside or outside the household.

2.2.4 Key Regulations and Tariffs

Bureaucratic Process

- According to bilateral agreements between Brazil and the UK, only registered companies can export to Brazil. The registration must be submitted by the sanitary authority in the UK.

- The registration will be analysed by the Brazilian Ministry of Agriculture, Livestock and Food Supply (MAPA), which will issue an Eligibility Certificate. Once eligible, the company must also register all products that will be exported.

Labelling

- In order to export to Brazil, each product must carry a Label Certificate, issued by MAPA. A company is only eligible to apply for a Label Certificate once it is registered to export to Brazil. A Label Register form (covering composition of the product, preparation process, storage system, quality control, etc) must be filled out and signed by the representatives of the company as well as the sanitary authority in the UK. The documents must be then forwarded to MAPA. Timing for approval usually ranges from 30-60 days, once the documents are received by MAPA.

- Labels must necessarily be provided in Portuguese. It must include, among other requirements, the trade name of the product, ingredients (including additives), name of producer, lot identification, date of production and validity, net weight and registration number (with SIF/DIPOA/MAPA) accompanied by the country of origin.

Tariffs

- The standard import duty on almost all live, fresh and frozen sea fish, including fillets, is 10%. The import duty on crustaceans and molluscs is also 10%.

- Besides the import duty on the product, Brazilian importers are subject to three other fees: two social-contribution fees (PIS/COFINS, totalling around 9%) and the circulation fee (ICMS, which varies from state to state, with an average of approximately 18%).

- It is worth noting that the Brazilian taxation system (including the import taxation) involves a “cascade effect”. In other words, there is an accumulative charging of taxes. While the import duty is charged on the customs value (cost, insurance and freight) of the product, the PIS/COFINS taxes are charged on the customs value *plus* the import duty, and so forth.

- Brazil operates an international trade product coding system called the Nomenclatura Comun do Mercosul (NCM). This system works the same way as the Harmonised Code system and, indeed, the code numbers used are very similar. Below we have some of the more common seafood products with their NCM codes and import tax (please note that this is not the total tax payable as PIS, CONFINS and ICMS also need to be included):

Frozen Salmon (NCM 0303.11.00): 10%

Fresh or Refrigerated Trout (NCM: 0302.11.00): 10%

Fresh or Refrigerated Salmon (NCM: 0302.13.00): 10%

Fresh or Refrigerated Tuna (NCM: 0302.31.00): 10%

Fresh or Refrigerated Anchovies (NCM: 0302.42.10): 10%

All Frozen Seafood Products (position 0303): 10%

All Fillets (position 0304): 10%

Lobsters (NCM: 0306.11.10): 10%

Prawns (NCM: 0306.16.10): 10%

All Crustaceans (position 0306): 10%

Molluscs: 10%

Organic Certification Requirements

- In 2011, the Brazilian government created a national seal that distinguishes organic products from others, the "Brazilian System of Evaluation of Organic Conformity" (SISOrg). Only a product with the SISOrg seal will be officially considered an organic product.
- All imported organic food and products must be produced in conformity with the Brazilian technical norms and must be certified by an "Evaluation Organ of Organic Conformity", accredited by the Brazilian Ministry of Agriculture, Livestock and Food Supply. It is worth noting that that are no agreements

between Brazil and any other country regarding the equivalence or mutual recognition of organic conformity evaluation systems.

- Thus, the foreign company must adjust its procedures to ensure that its products are being produced in conformity to the Brazilian regulation, which in many cases may present differences compared to its native country's organic regulation (e.g. UK). These legal requirements were established by Decree n° 6.323 (December 27th, 2007), Article 19.

Labelling and Bureaucracy Requirements

The veterinary authorities will have to contact DIPES/DIPOA (Department of Fisheries connected to the Department of Animal Origin Products) at the Ministry of Agriculture, Livestock and Food supply as there will be the need to obtain an eligibility certificate that authorises any company to export fish to Brazil.

The next step, to be ready to export, is to have the labels of each product registered. Please note that according to Circular no. 125/98/DCI/DIPOA, all foreign establishments that are approved for exporting to Brazil should be aware of the necessity of prior approval by DIPES/DIPOA Brasilia of labels that describe the product. E.g.: name of species, how was it processed (if it is frozen or smoked), if it is whole, fillets or bits and all the other descriptive information that a label for a specific product should contain. This process of label registering usually takes up to 90 days.

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ANNEX: The form below is for registering the label and origin of the product.

REPÚBLICA FEDERATIVA DO BRASIL
MINISTÉRIO DA AGRICULTURA, PECUÁRIA E ABASTECIMENTO - MAPA
SECRETARIA DE DEFESA AGROPECUÁRIA - SDA
DEPARTAMENTO DE INSPEÇÃO DE PRODUTOS DE ORIGEM ANIMAL - DIPOA
FORMULÁRIO DE REGISTRO DE RÓTULO E PRODUTO DE ORIGEM ANIMAL IMPORTADO

1 – IDENTIFICAÇÃO

1.1 - Nº de controle veterinário/sanitário do estabelecimento produtor no país de origem:

1.2 - Nome e endereço do órgão central responsável pelo controle veterinário/sanitário do estabelecimento produtor:

1.3 - Número de registro do produto no Ministério da Agricultura do Brasil: ..../................................(*)

1.4 - Data de entrada no DIPOA:.............../.............../...............

1.5 – Nome empresarial (denominação) do estabelecimento produtor:

1.6 - Endereço do estabelecimento produtor:

2 - PETIÇÃO

Sr. Diretor do DIPOA,
A firma acima qualificada, através do seu representante legal e do seu responsável técnico, requer que seja providenciado nesse Departamento o atendimento da solicitação constante do item 3 desta folha.

3 - NATUREZA DA SOLICITAÇÃO

3.1 - Solicitação:

3.1.1. - ☐ REGISTRO	3.1.2. - ☐ ALTERAÇÃO DE COMPOSIÇÃO / PROCESSO FABRICAÇÃO
3.1.3. - ☐ ALTERAÇÃO DO RÓTULO	3.1.4. - ☐ CANCELAMENTO

4 - IDENTIFICAÇÃO DO PRODUTO

4.1. - Nome do Produto (Denominação de venda) Original e em português:

4.2 - Marca:

5 - CARACTERÍSTICAS DO RÓTULO E DA EMBALAGEM

5.1 - Rótulo:

5.1.1. - ☐ IMPRESSO	5.1.3. - ☐ GRAVADO EM RELEVO	5.1.5. - ☐ LITOGRAFADO
5.1.2. - ☐ ETIQUETA	5.1.4. - ☐ GRAVADO A QUENTE	5.1.6. - ☐ OUTRO (____________________)

5.2 – Embalagem:
5.2.1. - ☐ LATA 5.2.2. - ☐ PAPEL 5.2.3. - ☐ PLÁSTICO 5.2.4. - ☐ EMBALAGEM NATURAL 5.2.5. - ☐ OUTRO (______________________)

6 – QUANTIDADE E FORMA DE IDENTIFICAÇÃO

6.1 - Quantidade de produto acondicionada em unidade de medida:

6. 2 - Data de fabricação ou de embalagem e o prazo de validade (local e forma de indicação):

7 - LOCAL E DATA

8 - AUTENTICAÇÃO

Assinatura e carimbo do representante legal do estabelecimento produtor	**Assinatura e carimbo do responsável técnico pelo estabelecimento produtor**

(*) Número seqüencial, seguido de barra e do número de registro oficial do estabelecimento junto ao Serviço Veterinário ou Sanitário de Inspeção. O número de registro deve ser indicado no rótulo e no corpo do certificado sanitário internacional dos produtos exportados para o Brasil.
Modelo conforme Ofício Circular DIPOA Nº 42/2010.

	REPÚBLICA FEDERATIVA DO BRASIL MINISTÉRIO DA AGRICULTURA, PECUÁRIA E ABASTECIMENTO - MAPA SECRETARIA DE DEFESA AGROPECUÁRIA - SDA DEPARTAMENTO DE INSPEÇÃO DE PRODUTOS DE ORIGEM ANIMAL - DIPOA **FORMULÁRIO DE REGISTRO DE RÓTULO E PRODUTO DE ORIGEM ANIMAL IMPORTADO**

9 - IDENTIFICAÇÃO

9.1 -Nº de controle veterinário/sanitário do estabelecimento produtor:
9.2 - Número de registro do produto no Ministério da Agricultura do Brasil: ..../..................................(*)

10 – COMPOSIÇÃO

10.1 - Ingredientes	**KG OU L**	**PERCENTUAL (%)**
TOTAL		**100%**

11 - PROCESSO DE FABRICAÇÃO

Descrição:

	REPÚBLICA FEDERATIVA DO BRASIL MINISTÉRIO DA AGRICULTURA, PECUÁRIA E ABASTECIMENTO - MAPA SECRETARIA DE DEFESA AGROPECUÁRIA - SDA DEPARTAMENTO DE INSPEÇÃO DE PRODUTOS DE ORIGEM ANIMAL - DIPOA DIVISÃO DE CONTROLE DO COMÉRCIO INTERNACIONAL - DCI **FORMULÁRIO DE REGISTRO DE RÓTULO E PRODUTO DE ORIGEM ANIMAL IMPORTADO**

11 - PROCESSO DE FABRICAÇÃO (cont.)

Descrição:

12 - SISTEMA DE EMBALAGEM

Descrição:

13 - ARMAZENAMENTO

Descrição:

14 - CONTROLE DE QUALIDADE/CONSERVAÇÃO DO PRODUTO

Descrição:

	REPÚBLICA FEDERATIVA DO BRASIL MINISTÉRIO DA AGRICULTURA, PECUÁRIA E ABASTECIMENTO - MAPA SECRETARIA DE DEFESA AGROPECUÁRIA - SDA DEPARTAMENTO DE INSPEÇÃO DE PRODUTOS DE ORIGEM ANIMAL - DIPOA DIVISÃO DE CONTROLE DO COMÉRCIO INTERNACIONAL - DCI **FORMULÁRIO DE REGISTRO DE RÓTULO E PRODUTO DE ORIGEM ANIMAL IMPORTADO**

15 - TRANSPORTE DO PRODUTO

Descrição:

16 - INFORMAÇÕES SOBRE O IMPORTADOR

Indicar o local e forma de aposição dos dados do importador:

17 - DOCUMENTOS ANEXADOS

Relacionar:

18 - LOCAL E DATA

19 - AUTENTICAÇÃO

Assinatura e carimbo do representante legal do estabelecimento produtor	Assinatura e carimbo do responsável técnico do estabelecimento produtor

REPÚBLICA FEDERATIVA DO BRASIL
MINISTÉRIO DA AGRICULTURA, PECUÁRIA E ABASTECIMENTO - MAPA
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DIVISÃO DE CONTROLE DO COMÉRCIO INTERNACIONAL - DCI
FORMULÁRIO DE REGISTRO DE RÓTULO E PRODUTO DE ORIGEM ANIMAL IMPORTADO

FORMULÁRIO DE USO EXCLUSIVO DA AUTORIDADE VETERINÁRIA/SANITÁRIA RESPONSÁVEL PELO CONTROLE HIGIÊNICO-SANITÁRIO DO ESTABELECIMENTO

1 - IDENTIFICAÇÃO

1. 1. – Nome empresarial do estabelecimento produtor:
1. 2. - Nº de controle veterinário/sanitário do estabelecimento produtor:
1.3 - Número de registro do produto no Ministério da Agricultura do Brasil: ..../................................(*)

2 - CERTIFICAÇÃO DA AUTORIDADE VETERINÁRIA/SANITÁRIA

Eu, abaixo assinado, certifico:

1. A empresa aplica adequadamente os métodos de controle de qualidade informados;
2. As instalações, equipamentos e fluxo de produção são adequados e aprovados para a elaboração do produto;
3. A empresa executa o processo de fabricação e atende à composição do produto conforme descrito;
4. O estabelecimento tem habilitação para exportar esse produto para o Brasil.

3. OBSERVAÇÕES

4. LOCAL E DATA

5. AUTENTICAÇÃO

Nome completo do funcionário do Serviço Veterinário/Sanitário responsável pelo estabelecimento produtor	**Assinatura e Carimbo do funcionário do Serviço Veterinário/Sanitário responsável pelo estabelecimento produtor**

Minimum and mandatory information for the LABEL TO BE ADDED TO THE ORIGINAL PACKAGE, FOR IDENTIFICATION IN PORTUGUESE, OF THE PRODUCT TO BE IMPORTED AND COMMERCIALIZED IN THE BRAZILIAN MARKET, according to IN 22/05.

1. Denomination of the product in Portuguese.
2. Ingredients: (in decrescent order of initial participation in the formula of the product, including, indicate any used addictives if it’s the case).
3. Produced by (companies name of the unit that manufactured the product) Indicating the location of the producing establishment (city, state, and country)
4. Est. Nº (number of sanitary control from the sanitary and veterinary service of Inspection of Products of Animal Origin). The stamp or official logo (inspection stamp) from the official body that does the sanitary control of the product registered on this label.
5. Identification of this batch
6. Date of manufacture (day/month/year)
7. Expiry date (day/month/year)
8. Liquid content
9. Registration at the Ministry of Agriculture sob nº 0000/000 (seqüencial nimbers – 4 algarisms, bar, flollowed by sanitary control nº of the establishment) for each product.

Industry (adjective native name of the country of origin

N.B.: Additional information about conservation, storage and use of the product can be inserted to the label, besides the necessity of addressing the legislation of the remaining entities of inspection.