

Target Market Scan

QUESTION

Pays ciblé :	Brésil
Description de votre produit :	Vin
Numéro de nomenclature locale de votre produit :	220421
Activité des entreprises que vous souhaitez identifier :	Importateurs/distributeurs de vin.
Langue du Target Market Scan :	Anglais

REPONSE

Bonjour,

Nous faisons suite à votre demande et vous invitons à trouver ci-joint une analyse sectorielle et réglementaire vous permettant de tester votre offre sur le marché du vin au Brésil.

Nous restons à votre disposition pour toute précision.

Cordialement,

L'Equipe BNP Paribas

TARGET MARKET SCAN

- SUMMARY -

1. Market analysis

- A. Import/ export flows
- B. Market reports and trends

2. Regulatory analysis

- A. Customs duties and local taxes
- B. Shipping documents
- C. Market regulations

3. List of counterparts

Short list of selected counterparts (with company name, website, contact person and details)

1. Market analysis

A. Import/ export flows

Export flows from Brazil to the rest of the world and 20 main partners

Product: 2204.21 (Grape wines nes, fortified wine or must, pack < 2l)

2010		2011		2012	
Country of destination	Value in USD	Country of destination	Value in USD	Country of destination	Value in USD
World	\$2,594,801	World	\$3,179,442	World	\$3,053,281
USA	\$478,630	USA	\$811,025	China	\$642,163
Paraguay	\$449,197	Netherlands	\$395,356	Netherlands	\$538,729
Netherlands	\$301,962	China	\$333,386	Paraguay	\$353,503
United Kingdom	\$295,690	United Kingdom	\$285,642	United Kingdom	\$334,856
Angola	\$189,891	Paraguay	\$181,113	USA	\$214,418
Belgium	\$185,411	Germany	\$141,951	Canada	\$146,035
Germany	\$138,666	Canada	\$128,076	Japan	\$113,955
Poland	\$95,198	Denmark	\$83,057	Belgium	\$89,653
Japan	\$74,628	Italy	\$80,298	Poland	\$89,158
Denmark	\$69,161	Norway	\$78,591	Finland	\$67,959
Canada	\$49,366	Angola	\$69,001	Australia	\$56,045
Ireland	\$42,795	Luxembourg	\$65,592	Germany	\$53,479
Estonia	\$40,778	Belgium	\$62,339	Switzerland	\$47,240
Luxembourg	\$32,549	Argentina	\$55,460	Portugal	\$47,022
Switzerland	\$21,600	Poland	\$50,684	Norway	\$31,515
Portugal	\$18,970	Finland	\$50,394	Czech Rep.	\$27,789
France	\$18,904	Japan	\$48,398	Denmark	\$23,802
Australia	\$17,960	Australia	\$40,704	France	\$22,591
Neth. Antilles	\$12,808	Czech Rep.	\$37,271	Estonia	\$19,384
Bahamas	\$12,759	Ireland	\$35,690	Sweden	\$17,280

Source: Comtrade

Import flows to Brazil from the rest of the world and 20 main partners

Product: 2204.21 (Grape wines nes, fortified wine or must, pack < 2l)

2010		2011		2012	
Country of origin	Value in USD	Country of origin	Value in USD	Country of origin	Value in USD
World	\$223,080,695	World	\$261,541,896	World	\$260,965,670
Chile	\$72,983,389	Chile	\$84,920,257	Chile	\$93,076,304
Argentina	\$52,126,581	Argentina	\$58,802,220	Argentina	\$55,595,434
Portugal	\$29,299,792	Italy	\$35,428,719	Portugal	\$35,630,467
Italy	\$28,683,242	Portugal	\$34,894,528	Italy	\$29,977,339
France	\$18,778,566	France	\$22,909,861	France	\$21,618,141
Spain	\$8,698,824	Spain	\$11,123,031	Spain	\$11,655,242
South Africa	\$3,600,658	Uruguay	\$3,467,152	Uruguay	\$3,707,092
Uruguay	\$3,175,051	Australia	\$2,811,273	South Africa	\$3,026,986
Australia	\$1,864,846	South Africa	\$2,135,894	Australia	\$2,464,001
USA	\$1,344,921	USA	\$1,756,901	USA	\$1,995,493
New Zealand	\$947,043	New Zealand	\$1,267,863	New Zealand	\$790,355
Germany	\$784,674	Germany	\$933,545	Germany	\$591,167
Greece	\$196,361	Greece	\$414,329	Greece	\$296,900
Hungary	\$160,961	Hungary	\$256,240	Hungary	\$168,862
Lebanon	\$123,283	Lebanon	\$137,954	Romania	\$85,321
Bulgaria	\$94,727	Israel	\$68,676	Austria	\$85,116
Israel	\$93,252	Slovenia	\$62,602	Lebanon	\$47,826
Mexico	\$63,663	Austria	\$56,227	Israel	\$47,579
Austria	\$30,075	Tunisia	\$37,492	Tunisia	\$42,918
United Kingdom	\$22,292	Canada	\$35,032	United Kingdom	\$26,466

Source: Comtrade

B. Market reports and trends

- **The wine market in Brazil:**

<http://www.inv.gov.ar/PDF/ComercioExterior/InformeEstadiBrasil2011.pdf>

Source: National Wine Institute, Argentina

- **The Brazilian Wine Market:**

<http://www.calwinexport.com/files/Brazilian%20Wine%20Market%20Sao%20Paulo%20ATO%20Brazil%202-24-2011.pdf>

Source: USDA (United States Department of Agriculture)

- **The wine market in Brazil:**

http://www.winealley.com/atlas_50473_en.htm

Source: WineAlley

- **The wine market in BRIC countries (Brazil, Russia, India, China):**

<http://www.iwsr.co.uk/pages/news/pressreleases/Highpotentialwinemarketsdampenedbymarketcomplexities.pdf>

Source: IWSR (International Wine & Spirits Research)

- **Rosé wine consumption in Brazil:**

http://www.viti-net.com/vigne_vin/article/rose-etude-wineintelligence-civp-consommateurs-monde-2329-70020.html

Source: Viti-Net

- **The Brazilian thirst for wine:**

http://www.wine-business-international.com/156-bWVtb2lyX2lkPTQ1NSZtZW51ZV9jYXRfaWQ9--en-magazine-magazine_detail.html

Source: Meininger's

- **Brazilian wine market currently worth a total value of R\$217.5 million:**

<http://www.companiesandmarkets.com/News/Food-and-Drink/Brazilian-wine-market-currently-worth-a-total-value-of-R-217-5-million/NI6815>

Source: Companies and Markets

- **Rabobank sees positive future for Brazilian wine market:**

<http://www.foodbev.com/news/rabobank-sees-positive-future-for-brazil#.UkLgUH94DVI>

Source: foodbev.com

- **Focus on: The Brazilian wine market:**

<http://www.drinksint.com/news/fullstory.php/aid/3393>

Source: Drinks International

2. Regulatory analysis

A. Customs duties and local taxes

- Customs duties

When importing products classified “220421” (Wine of fresh grapes, including fortified wines; grape must other than that of heading 2009, other than sparkling wine, in containers holding 2 l or less) from Spain, Brazil applies a custom duty of 27% of CIF value.

- Local taxes

- Tax on industrialised goods (TIG/ IPI)

Tax on industrialised goods is levied at a rate of 10% of the duty paid value.

- Contribution to funding of social security (COF)

Contribution to funding of social security is levied at a rate of 7.6% of the duty paid value.

- Contribution to social integration programs (PIS)

Contribution to social integration programs is levied at a rate of 1.65% of the duty paid value.

- Additional freight fee for the renewal of the mercantile marine (AFF)

An additional freight fee for the renewal of the mercantile marine is levied at a rate of 25% of the ocean freight charges.

- Tax on the circulation of goods and services (TGS)

Tax on the circulation of goods and services is levied at different rates in the Federative Units.

The rates may vary for specific products and usually amount between 7% of the duty paid value and 25% of the duty paid value.

The TGS standard rates are the following:

Federative Unit	Standard rate
Acre	17%
Alagoas	17%
Amapá	17%
Amazonas	17%
Bahia	17%
Ceará	17%
Distrito Federal	17%
Espírito Santo	17%
Goiás	17%
Maranhão	17%
Mato Grosso	17%
Mato Grosso do Sul	17%
Minas Gerais	18%
Pará	17%
Paraíba	17%
Paraná	18%
Pernambuco	17%
Piauí	17%
Rio de Janeiro	18%
Rio Grande do Norte	17%
Rio Grande do Sul	17%
Rondônia	17%
Roraima	17%
Santa Catarina	17%
São Paulo	18%
Sergipe	17%
Tocantins	17%

B. Shipping documents

Documents to be submitted by the exporter/ producer:

- **Single administrative document (SAD)**

Customs export declaration.

The official model for declarations to customs by the normal procedure shall be the Single Administrative Document. The single administrative document is composed of a set of eight copies which have the following functions.

Copy 1: Retained by the Member State where the export or Community transit formalities are carried out.

Copy 2: Used for the statistical purposes of the exporting Member State.

Copy 3: Returned to the exporter after being stamped by the customs.

Copy 4: Retained by the office of destination upon completion of the Community transit operation or as the document providing evidence of Community status of the goods (T2L document).

Copy 5: Return copy for the Community transit procedure.

Copy 6: Retained by the authorities of the Member State in which import formalities are completed.

Copy 7: Used for statistical purposes by the Member State of import.

Copy 8: Returned to the consignee.

In order to take account of certain requirements connected with the use of data processing, dual-function copies have been designed. They are assembled in sets of 4 copies, of which two can be printed in succession in order to produce the desired combination of copies.

The declaration must be drawn up in one of the official languages of the Community which is acceptable to the customs authorities of the Member State where the formalities are carried out. If necessary, the customs authorities of the Member State of export may require from the declarant or his representative in that Member State a translation of the declaration into the official language or one of the official languages of the latter.

- **Exit Summary Declaration**

The exit summary declaration shall be lodged by the exporter before the goods leave the EU customs territory (at least 24 hours before commencement of loading into the vessel, if sent by Containerised maritime cargo, at least 2 hours before the departure, if sent by rail or inland waterways, at least 1 hour before the departure, if sent by road, at least 30 minutes before the take off, if sent by air).

- **Commercial invoice**

A document containing the details of the transaction.

The invoice is to be prepared in Portuguese, Spanish or English.

To be submitted in the original.

- **Proforma invoice**

A proforma invoice is a price quote or estimated invoice sent by a seller to a buyer in advance of a delivery of goods. It informs the buyer of the kind and quantity of goods, their value, and other important information such as weight and payment terms. This helps the buyer to make a transaction decision and to confirm the order.

- **Certificate of Origin**
A document certifying the origin of the goods to be imported.
Only required if specifically requested by the importer or for other reasons. The customs authorities usually do not require non-preferential proofs of origin.
- **Packing list**
A packing list provides details about the shipment such as number of packages, weight, volume and description of the merchandise. One objective of the packing list is to facilitate the inspection and survey of the consignment that comprises the shipment and is included in the invoice. Custom officials and carriers use the packing list as a check-list to verify the outgoing and incoming cargo.
- **Combined Certificate of Origin and Analysis for Beverages Derived from Grapes**
A document certifying the origin of wine and of products derived from grapes and wine and proving that scientific analysis has been conducted by a certified laboratory in the country of origin.
The document is a prerequisite for the Registration of Imported Beverages Derived from Grapes and for the Permit to Import Wine.
Required for customs clearance and market access.
To be provided by the exporter in the original or in a legalized copy authenticated by the issuing body of the original document.

Documents to be submitted by the importer:

- **Import Declaration**
Document has to be filled electronically on SISCOMEX online system.
- **Registration of Importers of Beverages**
A document certifying that importers of beverages and vinegars to be imported have been registered in Brazil.
Required for customs clearance and market access.
The document is a prerequisite for the Import Inspection Certificate for Beverages, for the Registration of Imported Beverages Derived from Grapes and for the Permit to Import Wine.

The registration is to be applied for by the importer at the nearest office of the Plant Inspection Service under the Ministry of Agriculture, Livestock and Food Supply = Serviço de Inspeção Vegetal do Ministério da Agricultura, Pecuária e Abastecimento (MAPA)
- **Import Inspection Certificate for Beverages**
A document certifying that beverages in general, fermented acids and wine, as well as products derived from grapes and wine have undergone import inspection.
Required for customs clearance.
Issued by the Inspection System of the Ministry of Agriculture, Livestock and Food Supply = Vigilância Agropecuária (VIGIAGRO) do Ministério da Agricultura, Pecuária e Abastecimento (MAPA)

The certificate is issued for products for which the relevant documentation has been submitted and which are imported by companies that have completed Registration of Importers of Beverages. It constitutes a marketing authorisation for the Brazilian market.

Transport documents

- **Bill of lading**

A bill of lading is a negotiable instrument which means it is a document of title and the title of the goods can be transferred using this document. Different bills of lading exist, depending on the method of transport.

- **Confirmation of insurance**

A confirmation of insurance is a document issued by an insurance company. It confirms that an insurance policy has been purchased. It covers the loss or damage of ships, cargo, terminals, and any transport or cargo by which property is transferred, acquired, or held between the points of origin and final destination. The terms and conditions covered are as per the insurance documents.

- **Sea Waybill**

A waybill is a document providing for the automatic release of cargo to a named consignee. It is a receipt of goods but not a negotiable instrument and is an evidence of contract of carriage. The use of waybill does not effect the terms of the carriage and the terms of carriage may differ as per the carriers policies.

- **Transit Accompanying Document (TAD) or Transit/Security Accompanying Document (TSAD)**

This document contains data valid for the whole of the declaration. The information contained in the Transit/Security Accompanying Document shall be based on data derived from the transit declaration.

- **Loading List***

The load list must show the following information:

- (1) the name of the ship or the flight number of the aircraft due to carry the goods,
- (2) the expected date of departure,
- (3) the destination,
- (4) the number of packages in each consignment,
- (5) the marks and numbers of those packages,
- (6) a description of the goods.

For goods carried in freight containers or vehicles, the last three items of information may be omitted provided that the appropriate container or vehicle manifests, showing the details required for those items and the identifying numbers of the containers or vehicles, are attached to the load list. A load list is not required for goods presented via a port inventory system and declared to Customs electronically using NES

- **Manifest (Cargo, Container, Vehicle, Vessel, Aircraft)**

A Manifest is a document specifying the contents of particular freight containers or other transport units, prepared by the party responsible for their loading into the container or unit.

C. Market regulations

In the first export, it will be subjected to an analysis by the VIGIAGRO. If that test is positive, no further analysis will be required for the following one to three years, as long as you send an identical product: brand, origin, packaging, etc ...

Labeling requirements

The following information is required by Brazilian law to be placed on labels of alcohol beverages. For a product whose label is not in the Portuguese language, an adhesive sticker can be placed on the original label containing all the required information:

- Brand name of product
- Type of product
- Net contents (in metric units)
- Importer's name, address and corporate ID number
- Producer or Manufacturer's name and address
- MAPA Registration number of importer
- Country of origin
- Alcohol content (% alc. by volume)
- List of ingredients
- Lot identification code
- Storage care
- Period of validity (if applicable)
- Gluten declaration: "Contém Glúten" (Contains Gluten) or "Não contém Glúten" (Does not contain Gluten)
- Warning statement must be declared in bold letters on labels for beverages with alcohol content above 13 percent alcohol by volume: "Evite o consumo excessivo de álcool" (Avoid excessive consumption of alcohol).

The unit must present:

- The stamp control: is acquired with the Federal Revenue (Receita Federal) at the beginning of customs clearance.
- Tax on Industrialized Products additional taxation, also known as Imposto sobre o Produto Industrializado (IPI).

The exporter should forward a sample of the package to the importer in order to confirm label compliance.

The labeling requirements are described in Article 9 of the Brazilian standard "STANDARD No. 64 OF 2002 9 rubble."

For further information, please visit the website of the Brazilian Union of viticulture (in Portuguese):

http://www.uvibra.com.br/legislacao_inst_norm64.htm

3. List of counterparts

Importers and distributors of wine in Brazil

BARRINHAS

Rua Da Batata, 500 Mercado Sao Sebastiao
Penha Circular 21011-020
Rio De Janeiro,
Brazil

Phone number: +55 21 2131 0021

Fax number: +55 21 2584 9596

Email: vendas@barrinhas.com.br

Web site: www.barrinhas.com.br

Contact person: Cláudio Moreira (CEO)

BRUCK IMPORT ANF EXPORT

Rua Paula Souza,
216-326 Sao Paulo
Brazil

Phone number: +55 11 2273 111

Fax number: +55 11 2291 914

Email: info@bruck.com.br

Web site: www.bruck.com.br

Contact person: Osório Henrique Furlan Jr (CEO)

CASA DO VINHO

Av. Bias Fortes, 1543 - Centro 30.170-012
Belo Horizonte
Brazil

Phone number: +55 31 3337 7177

Fax number: +55 31 3284 8189

Email: info@casadovinho.com.br

Web site: www.casadovinho.com.br

Contact person: nc

CASA FLORA IMPORTADORA

R. Sampaio Moreira, 139 Brás, São Paulo - Sp
Brazil

Phone number: +55 11 3327 5199

Fax number: +55 11 3328 5199

Email: flora@casaflora.com.br

Web site: www.casaflora.com.br

Contact persons: Adilson Carvalho Junior & Antonio Pereira Carvalho Neto (CEOs, shareholders)

CBD GRUPO PAO DE ACUCAR

01402-901 - San Paolo

Brazil

Phone number: +55 11 3886 0218

Fax number: +55 11 3885 2174

Email: sergio.castro@paodeacucar.com.br

Web site: www.grupopaodeacucar.com.br

Contact persons: Luis Garcia & Rafael Esteves (buyers)

CLUB DU TASTE-VIN

Av. Almirante Barroso.

139 E 20031-005 Rio De Janeiro

Brazil

Phone number: +55 21 2633 8866

Fax number: +55 21 3630 0607

Email: g.soares@tastevin.com.br / contato@lamourduvin.com.br

Web site: www.tastevin.com.br

Contact person: François Dupuis (buyer)

DECANTER VINHOS FINOS

Avenida Brasil,

630 Ponta Aguda

89050-000 Blumenau

Brazil

Phone number: +55 47 3326 0111

Fax number: +55 473 326 9088

Email: decanter@decanter.com.br

Web site: www.decanter.com.br

Contact person: Adolar Hermann (CEO)

EXPAND GROUP

Rodovia Raposo Tavares 26 5

Moinho Velho Cotia

Brazil

Phone number: +55 11 4613 3350

Fax number: +55 11 4612 2179

Email: gastao@expand.com.br / corporativo@expand.com.br

Web site: www.expand.com.br

Contact person: Flavio Aguiar (General manager)

GRAND VIN

Av. Barao Do Bananal, 1301

05024-000 - Sao Paulo

Brazil

Phone number: +55 11 3672 7133

Fax number: +55 11 3673 7133

Email: grandvin@grandvin.com.br

Web site: <http://loja.grandvin.com.br/>

Contact person: nc

IMIGRANTES BEBIDAS

Av. Miguel Stefano,
2096 Agua Funda –
04301-001 Sao Paulo
Brazil
Phone number: +55 11 5058 2099
Fax number: +55 11 5058 9252
Email: atendimento@imigrantesbebidas.com.br
Web site: <http://www.imigrantesbebidas.com.br>
Contact person: Celso Rueda (Operations supervisor)

VINEA STORE

Rua Manoel Da Nobrega,
1014 - Paraiso 04.001-003
Sao Paulo
Brazil
Phone number: +55 11 3059 5200
Fax number: +55 11 3059 5205
Email: contato@vineastore.com.br
Web site: www.vineastore.com.br
Contact person: Walter Fonseca de Souza (CEO)

VINHOS & VINHOS PONTO COM COMERCIO

R. Dez de Novembro,
689, Cidade Alta, Bento Goncalves,
Rio Grande do Sul
Brazil
Phone number: +55 54 3463 8380
Fax number : +55 54 3464 8380
Email: atendimento@vinhosevinhos.com
Web site: www.vinhosevinhos.com
Contact person: Ronaldo Zorzi (oenologist and buyer)

ZAHIL IMPORTADORA

Rua Das Margaridas,
282 Sao Paulo
Brazil
Phone number: +55 11 5049 2400
Fax number: +55 11 5049 0455
Email: azahil@uol.com.br
Web site: <http://www.vinhoszahil.com.br/loja.aspx>
Contact person: Antoine Zahil (Owner)

Sources:

Amber Road

Market Access Database

ICEX

USDA

Comtrade

Kompass