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United States Department of Agriculture
Foreign Agricultural Service

January 2002

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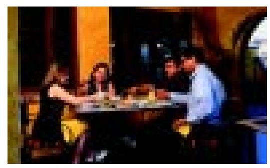
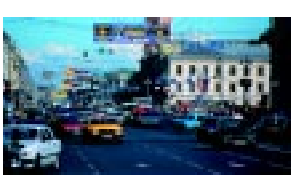
Features





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Mexico Proves a Resilient, Robust Market for U.S. Exports

For centuries, Mexico and the United States have had strong social, political, cultural and economic bonds. Implementation of the North American Free Trade Agreement (NAFTA) and efforts toward a Free Trade Area of the Americas (FTAA) are important recent initiatives bringing the countries closer together.

But in addition to these agreements and other areas of cooperation between the governments, the two countries enjoy a free exchange of social and cultural influences, contributing to trade and economic growth.

U.S. agricultural, fish and forest product exports to Mexico reached a record $6.8 billion in 2000. Sales are estimated to have set another record, $7.4 billion, in 2001. And market analysts think Mexico holds further opportunities, particularly in its food processing and retail sectors.

The Economic Landscape

Mexico has a free-market economy increasingly dominated by the private sector. Its number of state-owned enterprises fell from more than 1,000 in 1982 to fewer than 200 in 2000. Seaports, railroads, telecommunications, electricity, natural gas distribution and airports have been privatized and expanded. The nation continues to make an impressive recovery from the recession that began in 1994. In 2000, its gross domestic product (GDP) totaled $915 billion, and GDP growth reached 6.9 percent.

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Mexico has a population of just over 100 million and a workforce of nearly 40 million. About 22 million Mexicans can regularly afford to purchase imported food products. The younger generation is especially receptive to international influences and willing to purchase imports. About 40 percent of the workforce is made up of women, spurring demand for prepared meals and eating out.

With its stable government and currency, Mexico has retained its attraction for foreign investors, who put over $4 billion into the country's food and beverage processing industries in the past several years.

A Burgeoning Processing Market

Mexico is a major producer of agricultural goods, from bulk commodities to processing ingredients to consumer-ready items. The country has nearly 13,000 food processing firms, from small family operations to large firms that are among the most efficient and mechanized in the world.

The Mexican market for processed foods has been growing rapidly since 1995, and its food processing industry output has been expanding 5-10 percent per year in recent years. But despite its impressive growth and production variety, the Mexican food processing industry cannot supply all of the products demanded by Mexican customers.

The United States is Mexico's number one source of food ingredient imports. The United States dominates Mexican imports

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of whey protein, food starches, tallow, edible lactose, seasonings, natural and artificial sweeteners, colorings, flavorings, dough conditioners and beverage bases. Thickeners, texturizers, preservatives and spices also represent strong prospects.

Retail Sales on an Upward Trend

Mexico's retail sector continues expanding, with domestic and foreign firms jockeying for position in a very competitive market. The retail market was characterized by moderate sales growth and strong competition in 2000, with total store sales up 10 percent from the year before.

In 2000, U.S. exports of consumer-oriented products to Mexico reached a record $2.7 billion–roughly 70 percent of it ($1.9 billion) in the retail sector.

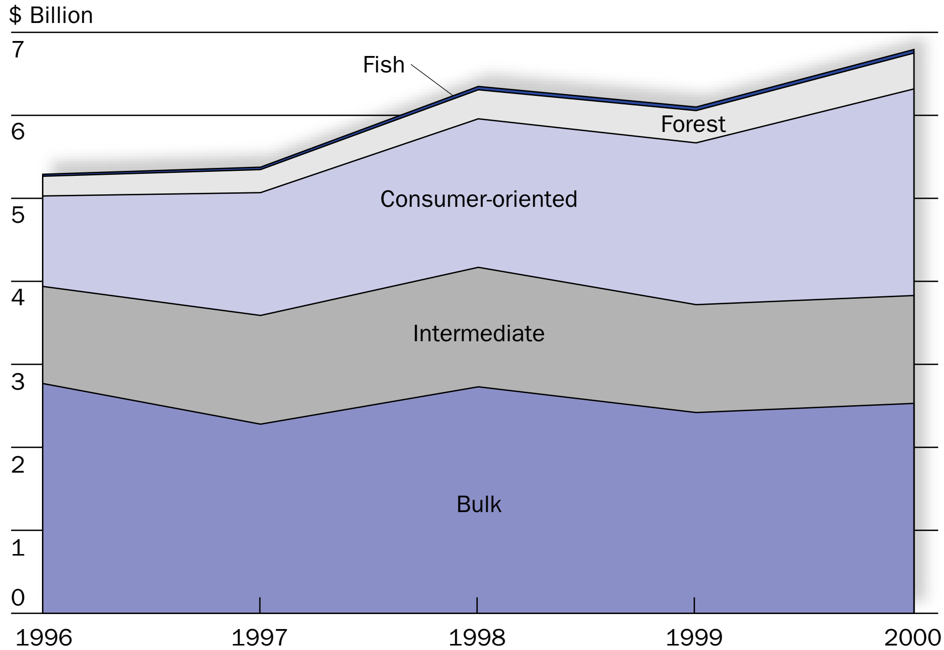
Large retailers and convenience stores represent the best sales venues for U.S. exporters. Importers, distributors and wholesalers continue to control the retail market, especially at the convenience and mom-'n'-pop store level.

Nevertheless, some major retailers (Wal-Mart, Gigante, Soriana and Casa Ley) have implemented direct purchasing for some of their departments, and so deal directly with foreign suppliers. Other retail chains will likely adopt this strategy in the next five years.

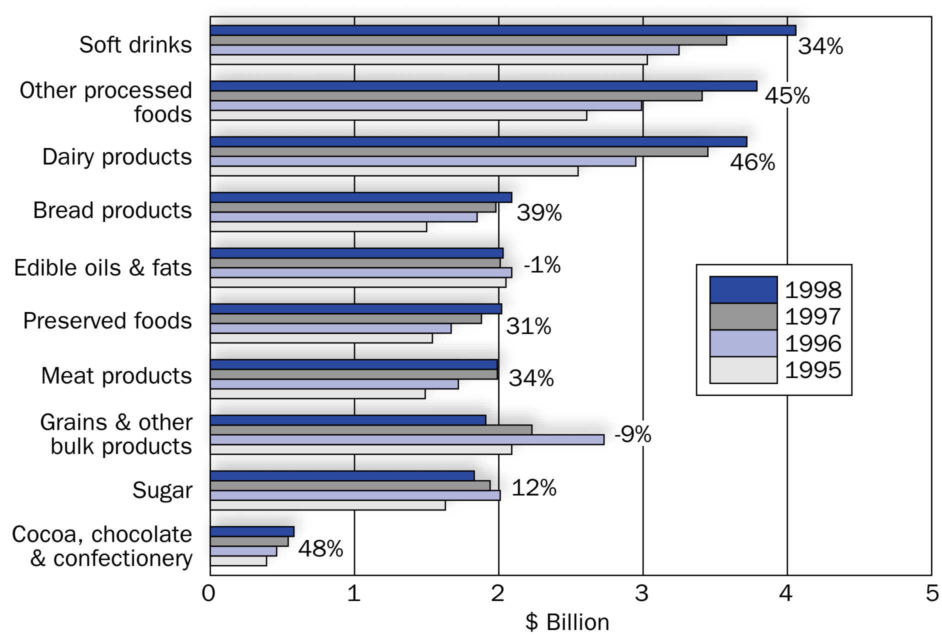
Net sales growth figures in 2000 for the four leading retailers in Mexico were: Wal-Mart, with 11.7 percent; Gigante, 8.8 percent; Soriana, also 8.8 percent; and Comercial Mexicana, 6.8 percent. All figures exceed 1999 data.

In the next year or so, Wal-Mart plans to spend $464 million to open 62 new outlets. HEB, another large U.S. retailer, will build 35 outlets in northern Mexico. Comercial Mexicana will invest $140 million in its stores.

U.S. Exports to Mexico Have Shown a Steady Upward Trend Overall

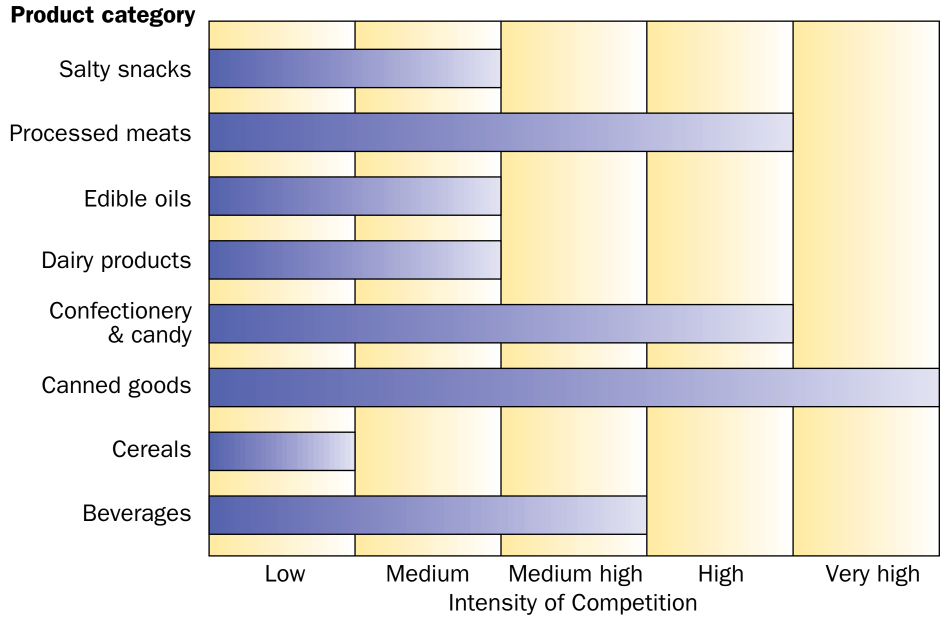


Most Segments of Mexico's Food Industry Have Shown Double-Digit Growth*



*From 1995 to 1998.

The Intensity of Competition for Mexico's Food Processing Industry Varies By Product Category–Creating Opportunities U.S. Suppliers Can Target



Traditional retail stores (such as grocery stores and mom-'n'-pop shops), although a large market segment, are not yet a viable option for imported products because of their comparatively small size and limited refrigeration. Operators often have only limited knowledge of imports, restricting their outlets' potential for U.S. products.

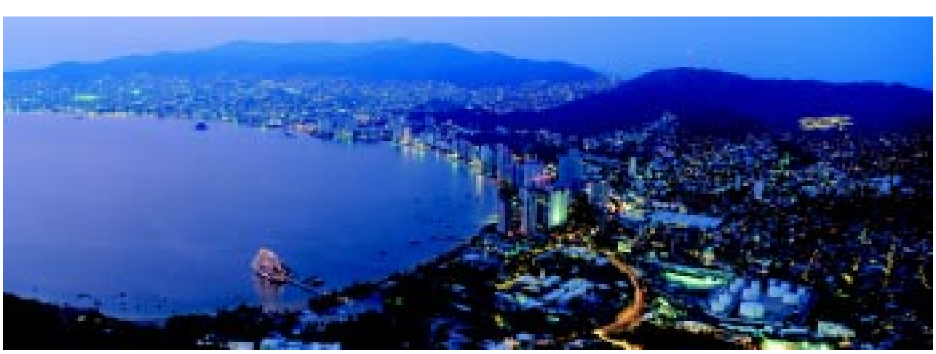
With their large numbers of customers, convenience stores comprise the fastest-growing segment of the retail sector. These outlets tend to be located in large and medium-size cities, usually in middle-income neighborhoods and business districts. Convenience stores typically offer longer hours and good service. The number of imported products they offer is growing, and has great potential for increased sales.

Market Advice and Words to the Wise

Despite its many advantages, Mexico also presents considerable challenges as a market for U.S. agricultural exports. For example, the number of consumers who can afford imports remains constrained by unequal income distribution, low wages, underemployment and limited advancement opportunities.

Moreover, the United States is not the only nation with which Mexico has strong trade and treaty ties. In 2000, Mexico completed free trade agreements with the European Union (EU), Israel, El Salvador, Guatemala and Honduras. Mexico also has a preferential trade agreement with Colombia, and is pursuing agreements with other countries in Latin America and Asia.

NAFTA secured preferential import duties for many U.S. products. However, now that Mexico has a free trade agreement with the EU, many products from that region also enjoy advantages. The number of EU products on Mexican store shelves is consequently climbing.



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Mexican consumers are very price-conscious, so U.S. suppliers should first consider marketing their less expensive product lines and presentations. Imports can be anywhere from 15 to 40 percent more expensive than similar local products.

The Mexican peso has been very stable in its parity with the strong U.S. dollar, helping to keep U.S. products competitive. This equilibrium must continue if U.S. companies are to increase their market presence and sales.

Retailers are awaiting the outcome of a Mexican government proposal to implement a value-added tax of 15 percent on food products and pharmaceuticals. Many retailers fear such a tax would seriously restrict consumer spending. However, in the long run, the measure could have a positive effect on the economy, by providing the government with needed additional revenue.

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As is the case in shipping to any country, exporters must make sure their products meet Mexican quality standards and labeling requirements. Regulations and controls for imported products sometimes change without advance notice, causing problems and delays for exporters.

Mexico requires that all labels for imported processed products be in Spanish, although they may be in another language as well. If the label is in two languages, the Spanish print must be the same size as that of the other language.

Tips for Traders

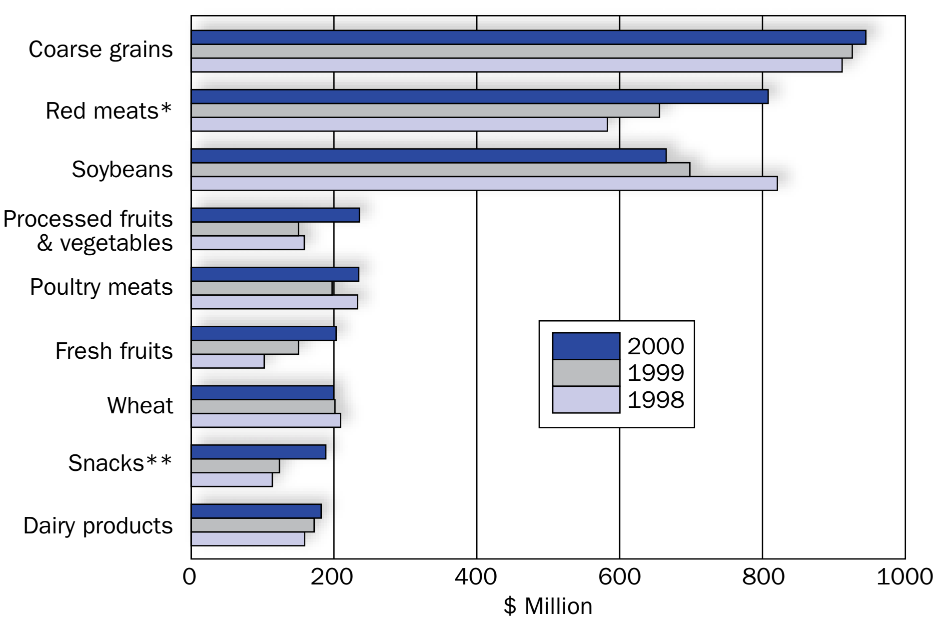
The best way to understand the Mexican market is to visit it to assess both opportunities and competition. Consult buyers, retailers, wholesalers, distributors and other players to prepare an effective entry strategy.

Local representation is essential to exporting success. U.S. suppliers should attend or participate in trade shows and missions to find potential representatives–importers, sales agents, distributors or buyers. Contacting a local distributor can be a useful first step toward market entry.

U.S. companies should take normal business precautions whenever dealing with potential representatives, including checking references. An effective representative must be able to ensure products are available at points of sale, assist with paperwork preparation and provide timely, thorough information on changes in import procedures and documentation.

U.S. suppliers should provide support for in-store and media promotions to familiarize customers with products. If possible, develop supplemental informational materials (such as promotional pamphlets) in Spanish. ■

Top U.S. Earners in the Mexican Market



*Fresh, chilled and frozen. **Excluding nuts.

For general market and retail sector information, or for assistance in identifying trade contacts and developing marketing strategies for Mexico, contact:

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This story is based on FAS Reports MX1080 and MX1099. To find them on the Web, start at **www.fas.usda.gov**, select **Attaché Reports** and follow the prompts.

For details on promotion and marketing opportunities for the Mexican market in the next year or so, see MX1127.

The Mexican Market For Kosher Foods

By Chad R. Russell

U.S. exporters of kosher food would do well to look to the growing Mexican market for sales. The size of Mexico's Jewish community is around 50,000. While it is not likely to increase much in the next few years, growing numbers of non-Jewish customers are purchasing kosher products, for both quality and sanitary reasons.

Some hotels and restaurants also purchase kosher foods for quality reasons, and to provide banquets for the Jewish community. According to trade contacts in Mexico, food and catering services offer the best potential for kosher products.

Supermarkets in predominantly Jewish neighborhoods in Mexico City normally feature kosher sections for meat, poultry, dairy products and some other processed foods, especially during Passover in the spring. Processed kosher products are often found in specialty delicatessens and Jewish mom-'n'-pop stores.

Kosher product prices generally run 15-50 percent above non-kosher prices. But certain kosher items, such as cheeses, may have lower prices than conventional items, since manufacturers and distributors sometimes agree to standardize prices.

Kosher Certification

In Mexico, two Jewish *kashrut* committees authorize kosher certification of products. They work closely with manufacturers of all types of consumer-ready products to ensure they meet strict Jewish dietary standards. This cooperation allows wholesalers

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and retailers to sell kosher-certified products.

Certifying organizations have arranged with Mexican slaughterhouses to perform kosher slaughter in separate areas of the facilities, under the supervision of rabbis.

Institutional Sales

Some 12-15 kosher caterers operate in Mexico City. They normally obtain their kosher products from food distributors and importers, as opposed to importing the products directly from manufacturers.

Mexican demand for kosher foods has increased more than 30 percent over the past 5 years, because of the many ceremonies and religious holidays celebrated by the Jewish community. While many Jews do not strictly observe kosher laws, they do expect restaurants and caterers to serve them kosher foods during celebrations and religious holidays.

Domestic Production v. Imports

Domestic manufacturers produce approximately 90 percent of fresh kosher products (such as meats and poultry) sold in Mexico. They also supply most of the market's canned and frozen products.

Mexican stores import many kosher items especially for important Jewish holidays. After the holidays end, stores often return to selling domestic kosher foods. The United States is the number one foreign supplier of kosher foods.

Kosher Promotion

The marketing of kosher foods in Mexico is a two-step process. The first step is to obtain kosher certification. The second step is to reach kosher consumers through press releases and advertisements in the Jewish media. The kosher consumer tends to be brand-loyal, interested in quality and well-read, making print media an effective promotional tool.

Many leading kosher manufacturers use the certification symbols to obtain preferred placement for their products in stores. Some food retailers in large Jewish communities give priority to kosher-certified brands when allocating critical shelf space.

The best way to promote kosher products in Mexico is through religious organizations, specialty distributors and caterers. Mexico City has 10-12 Jewish publications, including newspapers and magazines, that advertise kosher products. Each community has its own publications, all of which have kosher food sections.

Many Mexican supermarkets and large retail food chains have kosher food sections that would be ideal for in-store promotional activities. ■

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For details, see FAS Report MX1175. To find it on the Web, start at **www.fas.usda.gov**, select **Attaché Reports** and follow the prompts.

Beautiful Belize: A Market With Potential

By Daniel Orellana and Frank Coolidge

Belize may be the second smallest country in Central America, but it offers opportunities for exporters able to overcome risks and willing to explore new markets.

Belize at a Glance

Belize has a population of 243,000. The United States is the country's main trading partner. In 2000, the United States exported $32 million in agricultural products to Belize. Consumer-oriented foods were top sellers, especially snacks, fruit and vegetable juices and chilled meats.

The United States is also a major consumer of Belizean goods, buying $67 million in imports, mainly sugar and bananas. But sales disparity does not mean the country lacks market potential—if several barriers are lifted.

Benefits To Consider

Why might U.S. exporters consider shipping to Belize? It's nearby, and strongly influenced by North American culture. It's directly accessible by air and sea, and English is the official language.

Since 1976, the Belizean dollar has been pegged to the U.S. dollar at two to one. Belize's per capita income level, $2,800, is among the highest in Central America.

A Country of Challenges

But there are requirements to challenge exporters. To protect local agricultural production, the government requires import licenses on 27 products, including eggs, meats and potatoes. Procedures for obtaining import licenses are cumbersome and lack transparency; the U.S. government has work to do to achieve more open trade and product access.

Belize bars imports of many products, such as rice, beans, flour, pepper sauce, peanut butter and citrus; imports are permitted only if there is a declared national shortage. Import duties on food products are high, averaging 20 percent; a further tax of 18 percent is levied on all food items.

Market Outlets

The supermarket concept in Belize is more mature than elsewhere in Central America. A growing number of shoppers use medium-size supermarkets, though so far Belize has only two major chains.

But Belize has limitations in distribution and storing of refrigerated products. Outside the capital, Belmopan, lack of refrigerated transport and the high costs of equipment and electricity curtail market opportunities.

However, there is good access to cold storage in the hotel and restaurant industries, which cater almost exclusively to tourists. These businesses also tend to have wider latitude to import raw materials than supermarkets do.

Most consumer product sales at the high end of the tourism industry take place on Belize's islands. There may be an opportunity to run a supply service to the islands, but costs haven't been calculated.

In the last few years, over 10,000 Chinese have settled in Belize, creating a potential niche market for U.S. producers of Asian foods.

There is a trend toward more small convenience stores attached to gas stations, creating opportunities for snacks and other ready-to-eat products.

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Potential in Processed Foods

Processed foods offer further opportunities. Belize can supply only a fraction of the products needed by its processed food industry.

Until recently, Belize imported about $5.7 million in dairy products and $1.2 million in meat products from Europe per year. But due to bovine spongiform encephalopathy concerns, Belize has prohibited imports from these countries—creating an opening for $6.9 million worth of products. U.S. firms now have a better chance to compete for this market.

Another option with potential would be for a U.S. firm to form a joint venture with a Belizean firm to build and operate a food processing plant. The products would have immediate access to Caribbean countries and highway links to the rest of Central America.

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For details, see FAS Report BH1001. To find it on the Web, go to **www.fas.usda.gov**, select **Attaché Reports** and follow the prompts.

Colombia Still Ranks as the Largest U.S. Market in Central and South America

by Luz Hernandez

Colombia is holding onto its place as the second largest U.S. agricultural export market in Latin America, after Mexico. U.S. agricultural, fish and forest exports to Colombia totaled $424 million in 2000—virtually unchanged from the year before, despite continued repercussions from the severe recession of 1999. This article concentrates on Colombia's food processing industry as a market for U.S. agricultural products. Colombia's retail food sector was covered in the July 2001 issue of *AgExporter.*

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The Big Picture

Colombia faces many challenges to its prosperity. Total industrial output fell nearly 15 percent in 1999. Unemployment reached a record-high 20 percent in 2000, exacerbating unequal income distribution.

Colombia also confronts difficulties for two of its leading exports, oil and coffee. The country must find new petroleum reserves to offset declining production.

International coffee prices have dropped precipitously in the past several years, and the market is likely to remain soft for the foreseeable future. Meanwhile, Colombia's production has declined, curtailing its competitiveness.

Public security concerns persist, constraining foreign investment. The government's peace negotiations with insurgents will therefore continue to play a pivotal role in Colombia's economic performance.

Signs of Strength on the Bottom Line

Yet there are clear signs that Colombia is on the road to recovery. The country's

A Commercial Crossroads

Located in the northwest corner of South America, Colombia has both Atlantic and Pacific coastlines. This strategic position makes it a commercial bridge into South America for suppliers in North America, Europe and Asia.

Colombia has seaports with container facilities on both coasts: Barranquilla, Cartagena and Santa Marta on the Atlantic, and Buenaventura on the Pacific. The country's geographical proximity to the United States is a big plus, because it helps reduce costs for such integral activities as training trips, product and equipment transportation and trade show participation.

gross domestic product (GDP) totaled $250 billion in 2000, up 2.8 percent from the year before. The inflation rate averaged 8.7 percent, and the Colombian peso remained fairly stable.

Colombia's industrial output grew 9.7 percent in 2000, good news after the sharp decline of the previous year. Total imports jumped 7.6 percent by the end of 2000. Through August 2001, U.S. agricultural exports to Colombia climbed 4 percent, despite a drop in the value of bulk commodities due to price declines. U.S. consumer-oriented product sales rose 7.5 percent for the same period.

So overall, Colombia seems poised for muted growth in the next several years. The government is working to keep the recovery on track by maintaining low interest rates and putting the public sector into better fiscal shape.

Food Processing–a Pillar of the Economy

The Colombian food market is dynamic and efficient. Colombia's main processing companies–Colombina, Alpina and

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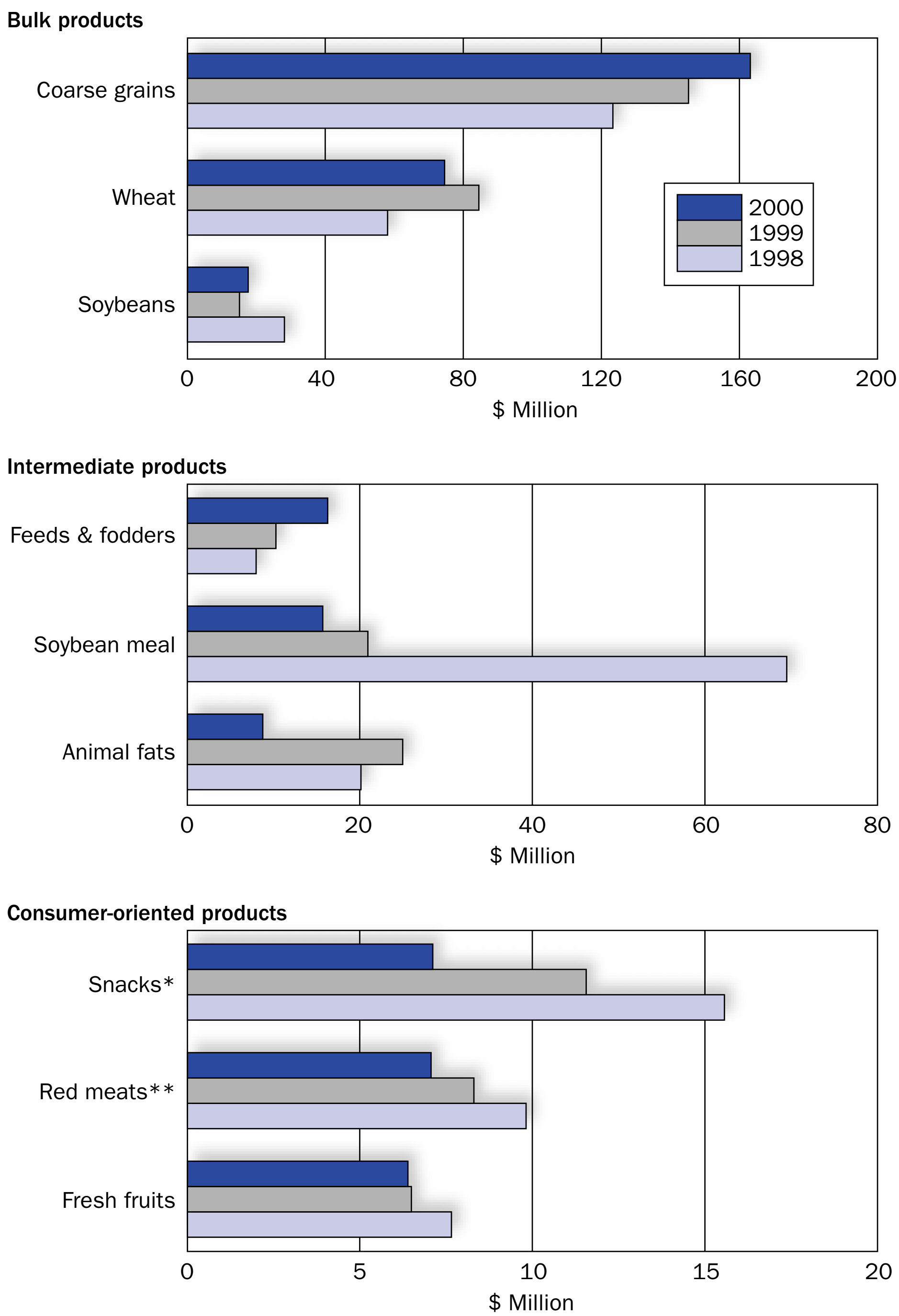
Although Shipments of Many Products Have Dropped Sharply Since the 1999 Recession, U.S. Best Sellers Still Span the Bulk, Intermediate and Consumer-Oriented Spectrum



*Excluding nuts. **Fresh, chilled and frozen.

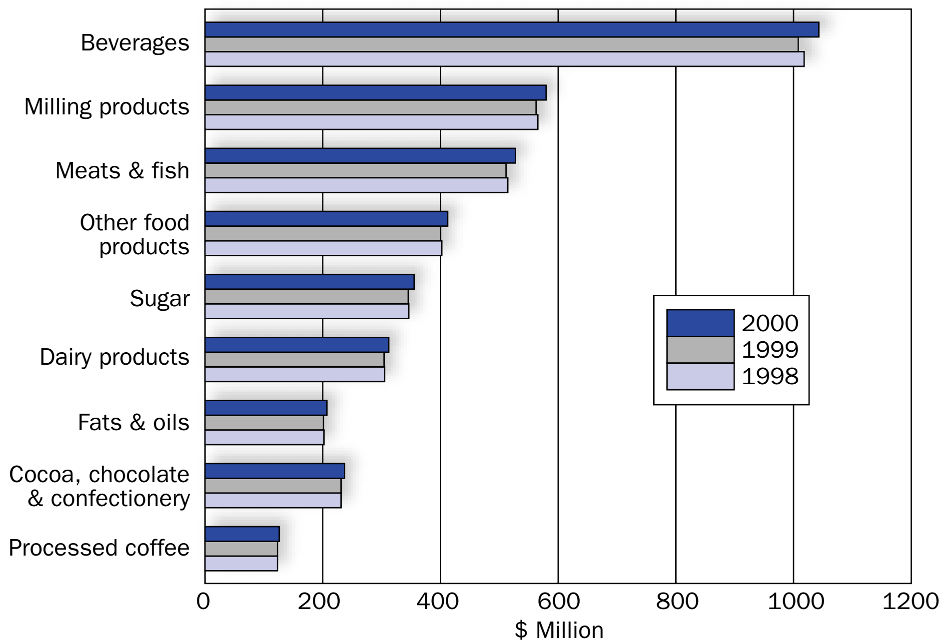
Levapan—with state-of-the-art technology and strong business acumen, compete successfully at home and abroad.

The food processing industry is one of the largest and most vital sectors of the Colombian economy, generating 3.8 percent of GDP. It accounts for 29 percent of industrial production and 19 percent of industrial employment. Food production is estimated to have climbed 3 percent in 2000.

Colombia is a major producer in many intermediate and consumer-ready categories, including: dairy products; breakfast cereals; snacks; baked goods; confectionery items; oils and margarines; dry mixes for jellies, sauces and condiments like mayonnaise, mustard and ketchup; poultry feed; and pet food.

But demand in Colombia for processed foods and other high-value products has grown so much in the past few years that it is outstripping the domestic industry's capacity to keep up with it. Colombia's food processing sectors rely heavily on foreign suppliers for ingredients like thickeners, preservatives, modifiers, flavorings, spices and dry mixes for sauces.

Colombia's Food Processing Industry Has Demonstrated Modest but Widespread Growth



The Challenges and Costs of Exporting

Not surprisingly, given this market's rapid growth and strong potential, competition for it has become increasingly intense. Colombia's stores feature food products from around the world, and Colombian companies are launching a variety of new frozen and ready-to-eat products.

As a member of the Andean Community, Colombia grants duty-free entry to agricultural products from fellow members Bolivia, Ecuador, Peru and Venezuela. For other countries, it imposes a variable import duty system on 13 basic commodities and 141 additional commodities–resulting in high and sometimes unpredictable duties that can range from 20 to 157 percent. Colombia also has preferential bilateral trade agreements with Chile and Mexico, which can make their products very competitive. For example, while U.S. wines bear a 20-percent duty, Chilean wines enter duty-free.

The Colombian government applies a restrictive, discretionary licensing system that effectively limits imports of some products. Import licenses for selected products are rejected if authorities determine such imports would harm domestic production.

Moreover, the government encourages official entities and decentralized industrial and commercial organizations to "buy Colombian." For example, when conditions offered by prospective contractors are fundamentally equal, contracts tend to be awarded to domestic providers of goods and services.

The import process has multiple layers, and paperwork can become a burden. And despite government efforts, artificially low-priced contraband products disrupt sales of legally imported products.

Market Advantages

But in spite of these challenges–as the export figures show—U.S. firms have been doing business successfully in this market for many years. More important, several factors will sustain Colombia's attractiveness as a market.

The government has adjusted foreign investment legislation to foster joint ventures, franchising and other forms of investment. Increasingly, Colombian companies are undertaking joint ventures, licensing agreements, mergers and other alliances to improve their competitiveness and market position.

Colombia has a very sophisticated,

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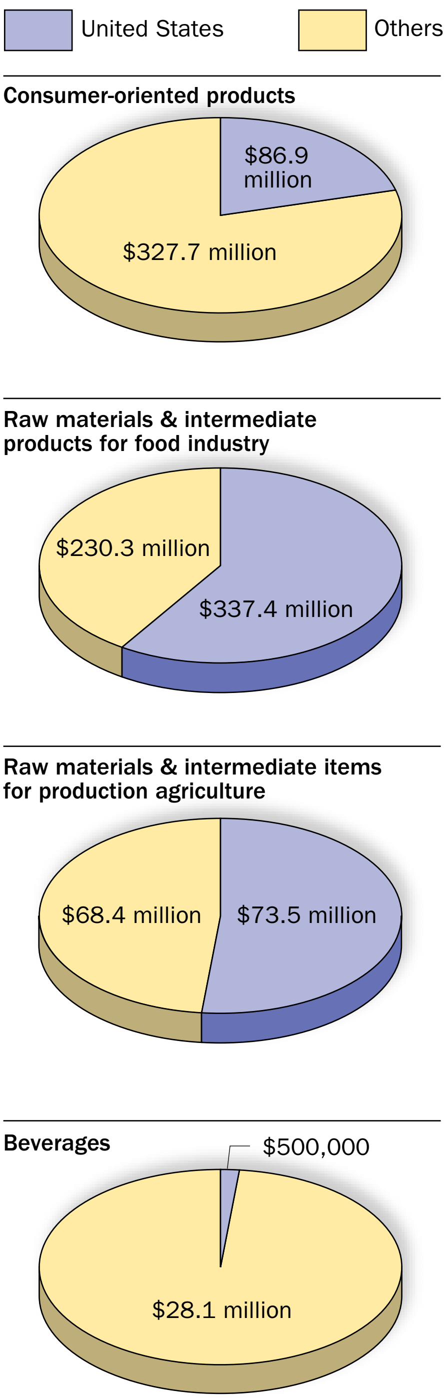
U.S. Share of Sectors That Support Colombia's Food Processing Industry



highly developed private sector. Many Colombian business persons have been educated in other countries, such as the United States. They often have considerable knowledge of, and confidence in, U.S. business practices and ethics. Colombians also tend to be friendly, straightforward and direct in conducting business.

Some Key Ingredients of Success

Here are some pointers for U.S. suppliers that want to establish or improve their position in Colombia's dynamic, growing market.

- Intensify advertising, sampling and promotional campaigns to compete with the wide range of quality products available. After-sales service and customer support is a decisive purchasing factor in Colombia.
- Take advantage of concession contracts offered by supermarkets for the promotion and sale of new or familiar products.
- Encourage prospective buyers to tour supplier and producer facilities, and send business representatives to tour Colombian facilities.
- Participate in trade shows at home and abroad. They are excellent opportunities to introduce new products, meet potential customers and personally address their technical needs and requirements.
- Appoint a local agent or sales representative. A reputable representative must be able to help with import procedures (which can be cumbersome), sales promotion and after-sales service (often crucial to success in the Colombian market).
- But be prepared to work closely and directly with customers. Colombians often prefer to deal directly with manufacturers or through their export divisions, rather than through outside representatives. ■

The author, an external contractor, based this article on reports prepared in conjunction with the Office of Agricultural Affairs, Bogota. For more information or assistance in exporting to this market, contact that office in the U.S. Embassy, Bogota, Colombia. Tel.: (011-57-1) 315-4147; Fax. (011-57-1) 315-2181; E-mail: agbogota@fas.usda.gov

For details, see FAS Reports CO1005 and CO1007. To find them on the Web, start at **www.fas.usda.gov**, select **Attaché Reports** and follow the prompts.

Eighty-five and Sunny — Venezuela's Hot For U.S. Foods and Beverages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By Rod McSherry

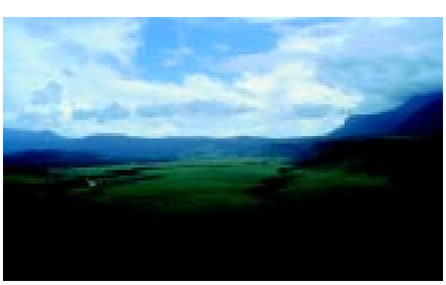
Where's a place just a few hours south of Miami with 25 million consumers with a penchant for U.S. baseball, where familiar quick-service restaurants abound, and it's always a good day for a barbecue?

Take a look on the northern rim of South America. There, on the southern shores of the Caribbean, you'll discover hidden opportunities that may have escaped the attention of other food and beverage exporters.

The Lay of the Land

Like the rain forests and Grand Savannah for which Venezuela is famous, the food and beverage market here can be rugged and sometimes unpredictable. However, for those who learn to navigate the straits–generally with the help of a trustworthy local guide–there are tremendous opportunities just on the other side.

However, unpredictability is still all too common in the areas of permits, inspection procedures and health and safety standards. But customs and tax authorities are being disciplined, and opportunities still abound for those who are willing to put in the effort.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And the local trade is adapting to the new business climate, continuing to expand food imports heading to this already $1.5-billion-a-year market.

Market Boosters

Unlike its neighbors, Venezuela has an economic engine virtually guaranteed to fuel its economy: oil. Since the 1970s, the flow of petroleum dollars into the relatively sparsely populated country has allowed the local consumer to be an international buyer, accustomed to ready access to the latest trends–from fashion and culture to foods and beverages.

Despite the ups and downs of the tumultuous 1990s, Venezuelans continue to be avid consumers of imported products, especially of U.S. foods and beverages. Growth in U.S. consumer-ready food exports to this market has been remarkable over the past three years–even as the country underwent dramatic political and economic change.

Domestic production capacity for consumer-ready products remains underdeveloped, and the resulting export opportunities for U.S. retail and food service products should continue to be significant for the foreseeable future.

Opportunities for U.S. exporters come in many shapes and flavors. Some possibilities may surprise even the most seasoned exporter. For example, although Venezuela is a major meat producer, the nation is among the fastest-growing meat importers in the region. Sales of U.S. beef are moving at an impressive clip, and opportunities for other meats, including poultry, are beginning to build momentum.

Another unexpectedly promising market niche is seafood. With sushi and other


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HIDDEN OPPORTUNITIES ABOUND IN THIS NEARBY MARKET.

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cuisines exploding onto the scene, importers are clamoring for reliable sources of high-quality fish, rice and seasonings. U.S. dairy products like sour cream, cheese, spreads and yogurt-based foods are also hot, attracting customers because of their quality and variety.

Fresh fruits have been notably successful in this market, generating tremendous demand for U.S. grapes, apples, pears, plums and other items. In contrast, one area that has not yet been scratched is fresh vegetables.

Essential Links

The main challenge for accessing this market is finding a solid representative or client in Venezuela. But fortunately, this is not difficult to do. The FAS office in Caracas, Venezuela knows this market inside-out, and is your direct link to establishing those crucial contacts you will need with major market players, from key importers to end users.

Opportunities to make such contacts are routinely organized by the FAS office through its major food and beverage promotion, the Great American Barbecue, held each year in June in Caracas. The office also organizes some of the region's largest buying missions to such important international shows as America's Food and Beverge Show, the Fancy Food Show, the Food Marketing Institute Show, the National Restaurant Association Show and the Produce Marketing Association Show. In the past few years, more than 200 new-to-market products have debuted at FAS-sponsored activities in Caracas, generating millions of dollars in new sales for U.S. suppliers.

The market is highly concentrated among the major importers and distributors, making it relatively easy to get to know the right people. These importers, together with FAS staff in Venezuela, can help you successfully negotiate government import requirements and paperwork.

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So, whether you're a seasoned exporter looking to expand your overseas markets or a newcomer just beginning your export efforts, Venezuela could be your next step in the right direction. It's a growing and dynamic market, but it's also a manageable size and relatively close. It could be well worth your while to get to know more about this neighbor with "American" tastes. ■

The author was the agricultural counselor at the U.S. Embassy, Caracas, Venezuela, from 1998-2001. For more information on the Venezuelan market, contact that office at: Tel.: (011-58-212) 975-8861; Fax: (011-58-212) 975-7615; E-mail: agcaracas@fas.usda.gov

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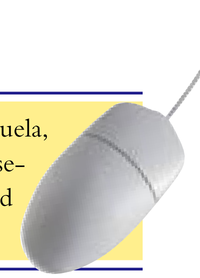

Changing the Way Venezuelans Shop –And Eat

Venezuela is a surprisingly dynamic and diverse country that boasts the second largest number of U.S.-based food franchises south of the U.S. border.

Well-known U.S. franchises such as McDonald's, Wendy's, TGI Friday's, Chili's, Papa John's and Tony Roma's, as well as Burger King, are growing beyond expectations and heating up demand for imported ingredients.

The long-awaited breakthrough of the hypermarket has finally come to Venezuela with the opening of a store partially owned by the Casino group from France and the Exito group from Colombia. Although representatives from U.S.-based mega-stores have visited Venezuela on exploratory missions, they have not begun constructing any outlets.

Venezuela has undergone a continuous metamorphosis–from a country of small food stores known as "bakeries" that sell a wide but inconsistent array of food and deli items to a country with state-of-the-art supermarkets that carry a phenomenal assortment of local and international brands.

This may well be the time to establish fundamental business relationships with these new points of sale and their suppliers. The FAS office in Caracas knows these market players and would be an ideal starting point for discovering your export potential.

Russian Food Retailers Look to Imports as They Grow

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As the Russian food retail sector moves from kiosks and traditional outdoor wholesale markets to well-equipped modern food stores, the largest Moscow food retailers—Perekryostok, Seventh Continent and Ramstor—planned to open as many as 20 new stores in 2001 alone. This retail trend means new export opportunities for U.S. agribusinesses.

Ready To Buy

Large Russian cities—particularly Moscow, St. Petersburg, Nizhniy Novgorod and Yekaterinburg—are experiencing sharp growth in their retail markets. Throughout the country, the general economic situation is improving, and consumer incomes continue to rise.

As a result, Russians are spending more on better quality food products and nonessential items, such as videos and jewelry. The fact that the average Russian is not burdened by long-term credit payments, such as home mortgages or car payments, also contributes to larger disposable incomes.

Moscow's Retail Rebirth

Moscow regional government officials recently unveiled a 20-year plan to invest $3 billion in renovating existing shopping facilities and, at the same time, approved a plan for constructing new shopping centers. The plan includes the construction of eight retail zones of 100,000 square meters each over the next 20 years.

The regional government hopes to attract further investment in the local retail sector from financial and business groups and will also encourage the development of trade associations.

Where the Stores Are

The majority of the new retail trading centers will be located in Moscow's outlying areas. At the moment, 64 retail outlets with 1.5 million square meters of floor space are under construction. New wholesale and retail centers are designed to have readily available warehouse space and service infrastructure—parking garages, gas stations, car services and offices.

More Choices, More Trade

Retail outlets in Moscow now offer about 30,000 types of food products (45 percent are imported). But throughout much of the rest of the country, consumers remain very price sensitive. As a result, 70 percent of consumers continue to buy food products at traditional wholesale markets to take advantage of the lower prices.

Supermarkets' retail trade has been growing about 10 percent annually. However, the capital, Moscow, still lags far behind other large European cities in terms of the number of large retail centers.

Retailers Unite, Build New Stores

There is a growing trend toward consolidation in the food retail sector, especially in Moscow, St. Petersburg and Yekaterinburg. In part, this is being done to maximize retailers' buying power and to create new marketing efficiencies. However, the existing retail chains are also trying to prepare for the entry of several large foreign retail chains, such as Germany's AVA and Metro Cash and Carry, France's Auchan and Dutch retail chain Spar.

Russian Retail Chains Unite

Seventh Continent, Russia's second largest retail food chain, has joined forces with four other non-food retail giants:

- **Arbat Prestige:** Chain of cosmetic stores, with 50 percent of total market share
- **M. Video:** Chain of video/appliance stores, with 12 percent
- **Starik Khottabyck:** Chain of home improvement stores, with 10 percent
- **Sport Master:** Chain of sport clothing, shoe and equipment stores, with 25 percent

RUSSIANS ARE SPENDING MORE ON FOOD AND NONESSENTIAL ITEMS, SUCH AS VIDEOS AND JEWELRY.

To maximize their efforts during this growth period, large retailers in Moscow and St. Petersburg have begun to create retail associations. Perekryostok, the largest Russian retail food chain, has joined with several other food retailers to form the Russian Retail Alliance. The Alliance now accounts for 72 retail outlets in Moscow and St. Petersburg, catering to more than 1 million buyers every month. Its total annual trade turnover is $500 million.

Seventh Continent, the second largest retail chain in Russia, has joined forces with four other non-food retail giants. Together, these five chains have 63 stores, which sold $410 million worth of goods in 2000. In 2001, the group planned to increase its retail volume twofold and open 30 new stores.

Five large retailers in St. Petersburg plan to create another retail association called Yunisam. Total sales of the new association are anticipated to reach $60 million.

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Opportunities To Export

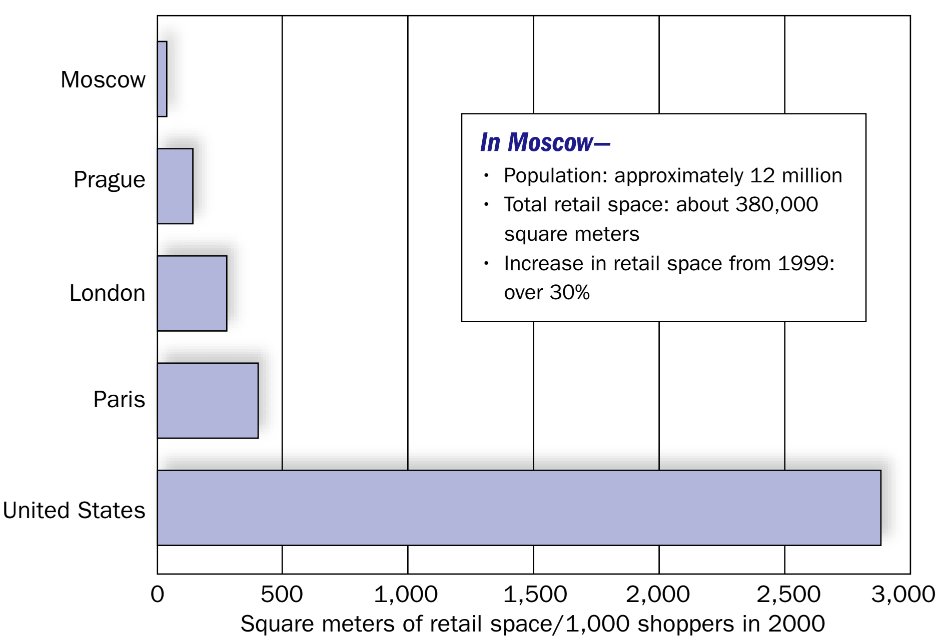
Although domestic food products still dominate the Russian retail food market because of their lower prices, improving consumer incomes should create greater demand for well-priced imports of good-quality food products. At present, imported food products make up 30 percent of Russia's total agricultural and food sales.

During the next few years, this dynamic food retail sector will bring new opportunities for domestic food manufacturers and foreign suppliers willing to make the effort to enter the Russian market. ■

Russia's Retail Trade Is Growing

- **Total sales volume of consumer goods in 2000:** 700 billion rubles (approximately $23.7 billion)
- **Imports' share of 2000 total agricultural and food sales:** more than 30 percent
- **Increase in total sales of consumer goods over 1999:** 133 percent
- **U.S. share of Russia's total retail sales in 2000:** 30 percent ($22 billion), up slightly from 1999
- **Average Russian worker's disposable income spent on retail purchases:** 75-80 percent
- **Average Russian worker's monthly income:** $50-$100, regional cities; $400, Moscow

Russian Shoppers Need More Stores



For more information, contact the U.S. Agricultural Trade Office, Moscow, Russia. Tel.: (7095) 728-5560; Fax: (7095) 728-5069; E-mail: agtrade@corbina.ru

For details, see FAS Report RS1303. To find it on the Web, start at **www.fas.usda.gov**, select **Attaché Reports** and follow the prompts.

Poland's Growing Wine Market

By Jolanta Ganczewska

The increasing popularity of wine among Poland's 40 million consumers during the 1990s reflects not only Poland's closer ties with the West, but also the growing belief by Poles that wine represents a healthy lifestyle. At the same time, Poland's accession to the European Union (EU) will reduce or eliminate some of the customs duties for most suppliers to the Polish market. Poland hopes to achieve EU accession by January 2004.

Economic Indicators

Poland remains a very attractive market for foreign investment and sales. The country has one of the fastest-growing economies in Central Europe, with economic growth averaging 5 percent annually over the last decade.

While the estimated economic growth for 2001 is only 2 percent, the new Polish government's plan to revive the economy could stimulate further economic expansion in the near future. As the Polish market grows, wine may be extremely profitable for U.S. exporters.

Whetting Wine Consumption

Poland's per capita wine consumption is significantly lower than that of other European countries. Poland's wine consumption is around 5.6 liters per person annually, while in France and Italy, annual per capita consumption is around 50-70 liters.

Polish consumer tastes have been influenced by Bulgarian vermouths. Poles prefer seasoned and sweet wines, and their market is dominated by lower-priced products. With consumption of wine expanding 10-15 percent a year, wine will soon rival beer and vodka in popularity with Polish customers.

Several large- and medium-sized firms have been importing wines for the past 10 years. These firms import from countries all over the world, including Australia, Chile, France, Germany, South Africa and the United States. Wines are also imported in bulk and bottled in Poland by 200 firms. The largest Polish bottling companies have sought foreign investment to modernize their bottling and distribution systems.

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Consumer preferences indicate that bulk wines bottled in Poland are not as popular as imported bottled wines. Polish consumers are very aware of country of origin codes and look for them when purchasing wines.

Wine consumption in Poland increases during the Christmas season, in February during winter carnival celebrations and also in the spring, when vodka consumption is discouraged because of religious observances. Large companies in the fine wine sector indicate that 30 percent of their total yearly sales occur during these periods.

The most popular categories are red, sparkling and white wines. Dessert wines are currently very popular with Polish consumers, but in a few years, dessert wines are expected to surrender some of their popularity to sparkling wines. Consumption of sparkling wines has been growing quickly and is expected to reach 1.6 liters per capita in the next decade.

As noted above, Poles have customarily favored beer and vodka. Vodka consumption still dominates the market, accounting for 53 percent of all alcoholic beverage consumption. Beer has a 37-percent market share.

However, the wine industry is growing tremendously each year, and it is estimated that more than 10,000 different wine brands are now present in Poland.

Distribution Flows

Most of the larger importers distribute wine through their own wholesale operations throughout Poland. Besides using their own distribution channels, importers also sell their products to independent wholesale firms, which in turn distribute wines to hypermarkets, specialty shops and small retail stores in larger cities. Currently, the largest retail stores do not import wines for

WITH CONSUMPTION GROWING 10-15% A YEAR, WINE WILL SOON RIVAL BEER AND VODKA IN POPULARITY.

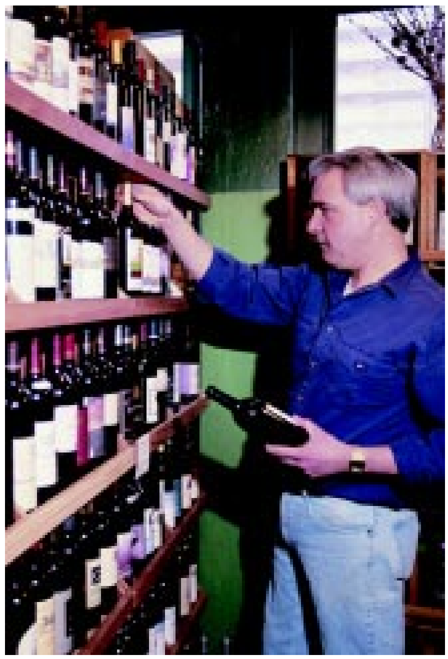
their own distribution, but rather obtain them from a local importer or a wholesaler. In recent years, small chains of specialty shops have emerged on the Polish market. These shops, located in larger cities, tend to concentrate on more expensive varieties of wine.

Trade Constraints

Currently, U.S. wines entering Poland face a 30-percent tariff, a 22-percent value-added tax and a $0.33-per-liter excise tax. A U.S.-Polish Trade Agreement of July 2001 will reduce the 30-percent tariff to 20 percent by Jan. 12, 2002, on selected table wines.

Companies wishing to import wines to be sold in Poland need to obtain a permit from the Ministry of Economy to conduct wholesale distribution. Retailers wishing to distribute wines must obtain permits from the local county authorities.

Wines imported in bulk and in individual bottles must have labels in Polish.



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The label must contain the following information:

- the name of the product,
- the name and address of the producer,
- the name and address of the importer and
- the alcohol content.

Bottles of imported wines can be distributed with original labels, but they must also bear stickers in Polish.

Poland does not permit the use of artificial colors in wine, and the content of sulphur must be limited. Polish regulations on import documentation are similar to those of the EU.

Staging Promotions

The Government of Poland has strict laws and regulations concerning the advertisement of beverages with alcohol content over 18 percent.

Companies use a variety of techniques to differentiate their products. The use of added-value promotions with the purchase of wines is very popular. In this sort of promotion, the company provides a gift with the purchase of wine, such as a corkscrew or a glass with a company logo on it.

Wine tastings are prohibited at supermarkets, hypermarkets and liquor stores. Specialized stores, however, may obtain permits to allow tastings. Some California wineries have pooled their resources to undertake promotions.

Price Plays Its Part

Price will play a major role in any growth in demand for and popularity of wines in Poland. Most of the population cannot afford high-quality wines. It is not surprising to find that cheaper brands of wines (with prices equivalent to beer) dominate the market.

Retail prices for wines vary, depending on the type (red, sparkling, white), the country and region of origin and the perceived quality. The popularity of a wine is influenced by "word of mouth" and by television series and films.

Current market trends show that Polish consumers prefer "exotic" and "ecological" wines from Chile and South Africa over wines from Bulgaria, primarily due to the assumption that these wines are more pure and healthful than other wines offered on the market.

Retail prices for wine can range from 8 to 100 zlotys ($2.00-$25.00) in supermarkets and from 20 to 1,200 zlotys ($5.00-$300) in wine specialty shops. ■

Entering the Market

Contacting the right importer will help a business enter the Polish wine market. Supermarkets, hypermarkets and specialty shops buy most of their wines through wholesalers, set up through large importers that have their own distribution channels and marketing contacts.

For a list of larger importers of wines in the Polish market and other key information, contact the author of this article:

Jolanta Ganczewska, agricultural marketing specialist, the Office of Agricultural Affairs, U.S. Embassy, Warsaw, Poland. Tel.: (011-48-22) 621-3926; Fax: (011-48-22) 628-1172; E-mail: agwarsaw@fas.usda.gov

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Trade Notes...

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U.S. Pavilion Stands Tall at ANUGA

The U.S. Pavilion at ANUGA, the world's largest biennial food show, in Cologne, Germany, attracted buyers from around the globe. Close to 165,000 buyers from 147 countries and 6,205 exhibitors attended the show. Due to the tense global situation, attendance was down a little more than 10 percent, primarily from Japan and North America. A total of 185 U.S. companies participated–120 of them in the U.S. Pavilion. In general, companies reported lighter traffic but good-quality contacts. Half of the U.S. exhibitors reported sales projections of $20 million for the next 12 months.

Canada Delays Prohibition on "5 a Day for Better Health" Logo

The Canadian Food Inspection Agency has agreed to delay implementation of its ban on the use of the U.S. promotional logo "*Eat Fruits and Vegetables–5 a Day–For Better Health*," on prepackaged fresh fruits and vegetables sold in Canada, from Dec. 1, 2001 until Sept. 1, 2002. The new enforcement date will allow U.S. fruit and vegetable producers, shippers and Canadian importers time to design and purchase new packaging material to comply with Canadian requirements.

U.S. Products on Display in China

Forty-five companies exhibited in the U.S. Pavilion at Food and Hotel CHINA 2001, one of the country's largest food shows, held in Shanghai. The show attracted 11,000 visitors and 435 exhibitors from 32 countries. More than 250 American products were exhibited, introduced and tested, producing 650 serious business contacts, $60,000 in on-site sales and $4 million in 12 months' projected sales. Products of most interest included: potatoes, pecans, almonds, beef, poultry, ice cream powder, in-shell sunflower seeds, dry peas, grapes and fresh vegetables.

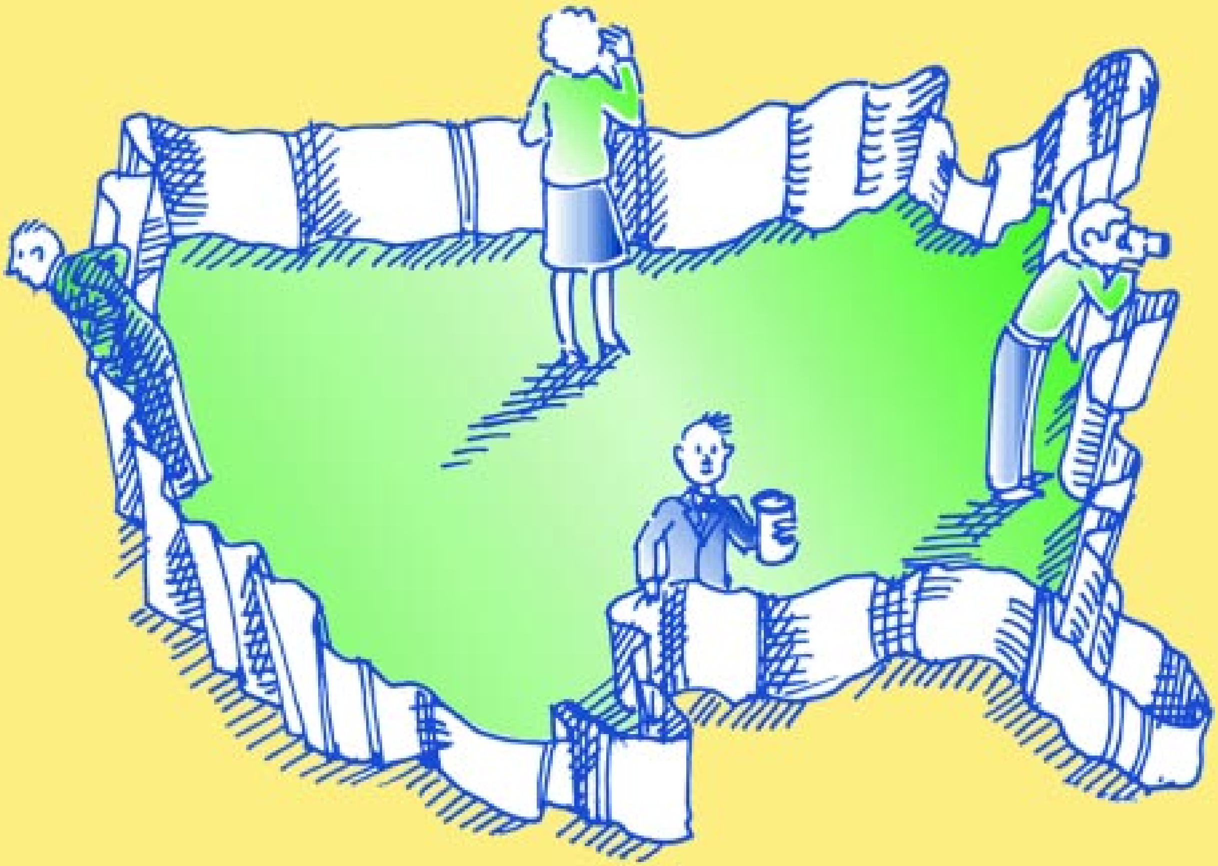
U.S. Kosher Foods Look to Europe for New Opportunities

In Europe, there is a growing market for kosher foods, which are attracting new consumers with their reputation for safety and wholesomeness. The U.S. kosher food market is valued at $130 billion, with 60,000 products manufactured by 8,000 companies. Although the European market is small by comparison, consumption is growing at a rate of 15 percent a year, and the market is valued at $5 billion–including $2 billion from France. USDA's Trade Show Office has endorsed Eurokosher 2002 as a good venue for U.S. exporters to get their share of the market.

New Zealand Expects Another Sharp Rise in Dairy Exports

New Zealand forecasts an 18- percent rise in dairy exports to $3.1 billion in the current New Zealand fiscal year, which ends March 2002. That increase follows growth of 37 percent last year. Expected improvements in international prices for butterfat and cheese are the major factors supporting the increase.

Think **outside** the borders.



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