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**CARACAS, VENEZUELA  
MARCH, 1994**

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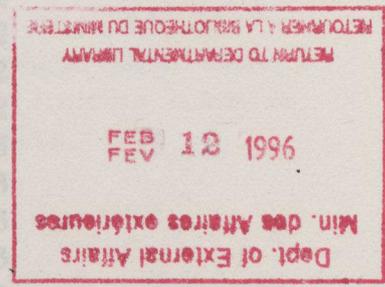
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## 1. VENEZUELA: BASIC DATA

### 1.1. GEOGRAPHY

Venezuela is located in the continental upper northeast corner of South America, just above the equator (East 60°/73°; North 1°/12°). Total land area 912,050 Km<sup>2</sup>. There are four different climate types in Venezuela: plains, jungle, mountains and the coastal. Major cities and most developed areas are located in regions accessible by water.

### 1.2. CLIMATE

The Venezuelan climate varies with land elevation, from tropical in the low-lying coastal region to temperate in the highlands. The only seasons in the country are the rainy season from June to November, and the dry season from December to May.

### 1.3. POPULATION 21.7 Million (1994)      Annual growth 2.35%

About 80.0% of the population lives in urban areas, concentrated in the coastal region and in areas of petroleum, mining and industrial development. The current population is ethnically diverse, reflecting a blend of aboriginal, european and african ancestors. Almost two-thirds are under 25 years of age. Immigrants have been an important source of manpower since the 1940 oil boom.

|                  |             |           |                |           |
|------------------|-------------|-----------|----------------|-----------|
| 1.4. MAIN CITIES | Caracas*    | 4,100,000 | Maracaibo      | 1,300,000 |
|                  | Valencia    | 1,000,000 | Barquisimeto   | 750,000   |
|                  | Maracay     | 600,000   | Puerto la Cruz | 450,000   |
|                  | (* Capital) |           |                |           |

### 1.5. TIME

Venezuela is four hours behind GMT and one hour ahead EST.

## 1.6. BUSINESS HOURS

Commercial offices open at 08:00 for an eight-hour day that includes a one or two hour lunch break. The work week is Monday to Friday, but some commercial establishments also operate on Saturday.

## 1.7. MEASURES

The metric system of weights and measures is used.

## 1.8. LANGUAGE

Venezuela's official language is Castilian Spanish but many businessmen speak or understand English. To a lesser degree, some french is used.

## 1.9. LEGAL SYSTEM

The legal system is based on Roman Law and the Napoleonic Code. The main tenets of the legal system are embodied in the Constitution (dated January 25, 1961), Congressional Laws, Executive Decrees, and legal norms of the Republic. The hierarchy of laws proceeds as follows: the Constitution, general laws, uniform (organic) laws, ordinary laws, regulations, decrees and resolutions.

The Supreme Court of Justice, the highest court, is the court of last resort. It is divided into three subject matter jurisdictions (politico-administrative, penal and civil), with five judges each.

## 1.10. POLITICAL SYSTEM

Venezuela is a federal republic of 22 states and a federal district. The current constitution established a democratic system of government based on the principle of separation of powers between the Executive, Legislative and Judiciary branches of government. The Executive Branch is made up of the President, whose term in office is five years, and the Council of Ministers. The Legislative Branch consists of the Senate and the Chamber of Deputies. The Judiciary consists of the Supreme Court of Justice and lower courts of the general and special jurisdiction.

## 1.11. GOVERNMENT

There are popular elections every five years to fill positions in Congress, the presidency and state governorships. The President is elected

directly by the people and can only serve one term for five years. During the past 35 years, Venezuela has become one of the most actively democratic countries in Latin America. In fact, voting is compulsory for any Venezuelan over the age of 18.

#### **1.12. RELIGION**

Religious freedom is guaranteed by the Constitution, either privately or openly. Roman Catholicism predominates.

#### **1.13. EDUCATION**

The Venezuelan Government provides education at all levels. There are nine years of elementary school, two to three years of secondary school, and three to seven years of university and technological studies. Public education is free at all levels. Approximately 11 percent of the national budget is assigned to education. Thirty percent of this amount is allocated to universities or technological schools.

#### **1.14. CURRENCY**

The bolivar is the Venezuelan monetary unit, designated by the symbol Bs. Bank notes are issued in units of 5, 10, 20, 50, 100, 500 and 1,000 bolivars, while coins are minted in units of 0.05, 0.10, 0.25, 0.50 cents and 1, 2 and 5 bolivars.

#### **1.15. STANDARDS**

There is a disparity of wealth between the very small upper class (1.0%) and the large lower class (78.0%) sectors of the population. The Venezuelan small middle class (21.0%), still have one of the highest standards of living in Latin America. Per capita income was estimated at US\$ 3,360 in 1993. Although the current rise in prices, inflation and interest rates has undermined the living standards of the middle and, in particular, lower sectors of the population. There is a substantial underground economy that increases, in many cases, the general standard of living.

#### **1.16. HOLIDAYS**

Statutory holidays for 1994/5 are: New Year's Day (January 1), Carnival, Easter, Declaration of Independence (April 19), Labour Day (May 1), Army Day

(June 12), Battle of Carabobo (June 24), Independence Day (July 5), Simon Bolivar's Birthday (July 24), Columbus Day (October 12), Christmas Eve and Day (December 24/25). Other holidays vary according to certain regions. However, when a holiday falls on Tuesday or Thursday, it is customary to make a holiday of the preceding or the following day.

### **1.17. SOCIAL LIFE**

The main leisure and recreational activities are sports (baseball), outings to the beach and mountains, and cultural events. Caracas has a strong cultural life.

### **1.18. BRIEF HISTORY**

Venezuela was discovered in 1498 by Columbus. The country was a Spanish colony for three centuries until 1810 when it declared independence. The man who led Venezuela to independence from Spanish domination was Simon Bolivar, Liberator of Venezuela and other five nations. The second half of the 19th century and the first half of the 20th century was not a propitious period in Venezuelan history. This epoch was filled by internecine warfare among landed strongmen or "caudillos", which had a devastating effect on the civil and political society. Since 1958 Venezuela has enjoyed democratically-elected civilian governments.

### **1.19. ECONOMY**

The Venezuelan economy is based on free enterprise, with a mixture of public and private ownership. Up to the beginning of this century, the economy of the country was based on agriculture (coffee, cocoa and livestock), as well as some commercial and handicraft activities. In the first years of the 20th century, petroleum became the principal factor in the economy. Currently the oil and mining industries, under government control, are the largest elements in the gross national product. The slump in oil prices and the burden of servicing the foreign debt have resulted in a recessionary economy; in 1993 inflation rate was at approximately 46 percent and purchasing power has been reduced; on the other hand, there is crawling peg devaluation of around 2.5 percent monthly against US currency. Despite attempts to diversify the economy, the country is still heavily dependent on oil as a revenue generator (64.3% of GDP). Agriculture accounts for only 6.0% of GDP; manufacturing, considered to be highly inefficient, accounts for 17.0% of GDP.

Venezuela is a resource rich country with extraordinary potential for economic growth. It is already the wealthiest country in Latin America in per capita terms. These factors combine with Venezuela's democratic system of government and vigorous, stable economy to make it one of the leading political and economic nations in Latin America. It is also one of the most attractive, dynamic markets and the most promising potential supplier of industrial goods on the continent.

## **1.20. AGRIFOOD PRODUCTION**

Venezuela has good natural climatic conditions and land appropriate for agriculture, especially the cultivation of: corn, coffee, cocoa, cotton, rice, sesame seed, tobacco, plantains and for cattle raising. Its 2,816 kilometres of open coast provide immense fishing resources, as well as excellent condition for aquaculture. The foreign investor is encouraged to investigate these areas. Foreign ownership of farmland is permitted.

The Venezuelan Agrifood industry infrastructure is probably among the best in Latin America, however it was developed under intensive and frequent political intervention which limited Venezuelan agrifood potential in terms of volume and quality. Consumers grew accustomed to stable food prices; due to massive state subsidies to the sector, which favour local production of food goods with major components of imported raw materials.

## **2. AGRIFOOD MARKET DATA.**

### **2.1. GENERAL OVERVIEW.**

Opportunities abound in the Caribbean for Canadian exporters of high-value food products (deli) and alcoholic beverages due to the significant increase in tourism and the expanding hotel and restaurant trade in the area. Geographic proximity to Canada (through U.S.-Florida), favourable import policies since countries accession to GATT and moderate freight rates makes Venezuela and the Netherlands Antilles (Aruba, Bonaire and Curaçao) an easily penetrated market.

The Netherlands Antilles like other of island nations of the Caribbean are primarily tourism oriented and must import most food products. Most food is imported to the Netherlands Antilles without import restrictions.

In 1993, the Caribbean region imported U.S.\$ 3.9 billion in foodstuffs, the bulk of which originated in United States. Aruba (8 minutes by plane from Venezuelan coasts and 25 minutes from Caracas) exemplifies an ideal Caribbean market for high value food products. Located off the coast of Venezuela, this island nation remains an autonomous part of the Kingdom of the Netherlands. Aruba actively promotes tourism and is expected to significantly expand its accommodation capacity by the end of 1993. With a small population (61,000) and a large influx of visitors (nearly 9,000 rooms), the resort and restaurant industries as well as the supermarket trade in Aruba and Curaçao have tremendous growth potential. Currently over ninety percent of all manufactured grocery items are imported from U.S. based brokers, fresh goods are imported from Venezuela.

Venezuela, too, is a very attractive market for high-value food products due to its emergence as a popular tourist and business destination (Margarita Island, Canaima Forest, The Andes and Caracas), its oil-rich economy, and its stable currency and democratic political tradition. The United States is Venezuela's most important partner, representing 60 percent of its international food trade, followed by Canada with 15 percent. However, Canadian processed food imports to Venezuela increased more than 70 percent during 1992/1993. In recent years, the Venezuelan Government has opened the economy to foreign investment and is in the process of rapidly reducing trade barriers and duties as well as privatizing many public services. Duties have been reduced on a majority of food products from 50 percent to 20 percent, since Venezuela's accession to GATT at the end of 1990, increasing market potential for Canadian exporters.

The Venezuelan economy is dominated by the petroleum industry, which represents 80 percent of its exports and 84 percent of the Government revenue. (Agriculture, however, accounts for only 6 percent of the GDP, and historically has been heavily subsidized. Manufacturing makes up 17 percent of the GDP and is highly inefficient). Thus, in the Government's attempt to diversify the economy, tourism has become a top priority. This move will capitalize on Venezuela's crossroads location, gorgeous natural scenery, and its well-developed hotel industry (nearly 66,000 rooms). Canada continues to represent 26.2 percent of

Venezuela' international tourist trade. Thirteen hotels are already undergoing privatization with the possibility of 100 percent foreign ownership.

Nowadays, the eastern coastal area (Margarita island and Puerto La Cruz) is the most important tourist attraction in Venezuela and has the largest private property investment in the country (hotels, resorts, time-sharing, condominiums, houses, etc.). Buyers and investors are local high/middle class, as well as, foreigners who came first as tourists and were enticed by with the affordable real-estate prices.

Most importers of high-value food products in Venezuela, depend on Florida (Miami) based food brokers/traders that supply them with a large quantity of imported premium goods from countries like: France, Italy, Spain, Portugal, Britain, Denmark, Holland, etc., due to the strong influence of the European culinary habits in the high income Venezuelan society.

One of the most outstanding features of Caracas, Venezuela's capital, is its immense variety of good local and international restaurants. Both Venezuelans and tourist alike frequent the myriad of restaurants offering specialities from around the world.

Evidently, both the Venezuelan and the Netherlands Antilles markets offer unlimited potential for Canadian exporters of high-value food products. Canadian exporters, as well as food brokers can target these deli-market, hotel and restaurant industries to capitalize on these regional growing markets.

New authorities at the Minister of Agriculture plans to implement following programmes:

- a) Financial assistance to the sector.
- b) Implement limited protectionist measures for domestic products.
- c) Implementation of price bands for 12 agrifood commodity products.
- d) Standardize regional import duty tariffs.
- e) Develop educational programme for farmers.

Venezuelan and Caribbean importers/wholesalers of high-value food have contacts with Miami based food brokers who supply them with all kinds of foodstuffs, deli products and beverages (alcoholic and non-alcoholic).

## 2.2. STRENGTHS AND OPPORTUNITIES.

Canadian high-value food goods due to attractive labelling and quality, will present an image of prestige to Venezuelan and Netherlands Antilles consumers.

Moreover the heavy European/American influence on Canadian taste may be a major advantage in marketing high-value food products in these Caribbean areas.

The following list shows some product categories for which there is good potential:

1. Dairy products (cheese, butter, processed milk, etc.)
2. Meat preserved products (ham, sausages, pates, etc.)
3. Fish products (salmon, cod, tuna, sardines, sea food, crab, and lobster meat, etc.)
4. Confectionary (sweet and salt) (chocolates, candies, corn and wheat snacks, crackers, cookies, biscuits, nuts, etc.)
5. Vegetables (frozen and canned) (mushrooms, asparagus, all beans, carrots, salads, potatoes, sweet corn, etc.)
6. Fruits (fresh, frozen, canned, dry and preserved)
7. Spirits and liqueurs (beer, whisky, liqueurs and soft drinks, etc.)
8. Other foodstuffs (honey, spices, pickles, spreads, syrups, sauces, soups, etc.)

However, as Canadian food goods will be "imported" once in Venezuela and the Netherlands Antilles, companies interested on this growing market must concentrate on their top of the line products. As their high-value food products, are going to compete only with the best of local and overseas products.

## 2.3. WEAKNESSES.

There are some difficulties that can eventually limit the high-value food trade from Canada:

1. Lack of Canadian food product stock with Miami brokers.
2. Venezuelan and Netherlands Antilles lack of knowledge of Canadian products, brands, prices, qualities, companies, distributors, brokers, etc.

3. Lack of direct transportation facilities between Canadian and Caribbean (Venezuela and Netherlands Antilles) Ports.
4. Venezuelan slow local legal product registration (brand, sanitary, etc.)
5. Lack of payment facilities.
6. Local businessmen's excessive profit margins.
7. Lack of storage and distribution facilities for frozen products un non urban areas.

### 3. AGRIFOOD SECTOR PROFILE.

#### 3.1. DESCRIPTION.

Imported processed and non-processed agrifood goods for human consumption.

#### 3.2. VENEZUELAN CUSTOMS POSITION.

Processed and non-processed food goods customs tariff code system are based on the Andean Pact (NANDINA) classification of products, which is as follows by category:

- **LIVE ANIMALS AND ANIMALS PRODUCTS. (code 01.01 up to 05.99)**
  - Live animals.
  - Meat and edible meat offal.
  - Fish and crustaceans, molluscs and other aquatic invertebrates.
  - Milk and dairy produce; bird's eggs; natural honey; edible products of animal origin, not elsewhere specified or included.
  - Products of animal origin, not elsewhere specified or included.
- **VEGETABLES PRODUCTS. (code 06.01 up to 14.09)**
  - Live floriculture products.
  - Edible vegetables, plants, roots and tubers.
  - Edible fruits and nuts; peel of citrus fruit or melons.
  - Coffee, tea, mate and spices.
  - Cereals.
  - Products of the milling industry; malt; starches; inulin; wheat gluten.
  - Oil seeds and oleaginous fruits; miscellaneous grains; seeds and fruits; industrial or medicinal plants; straw and fodder.
  - Lac; gums; resins and other vegetable saps and extracts.
  - Vegetable plaiting materials; vegetable products not elsewhere specified or included.

- **ANIMAL OR VEGETABLE FATS AND OILS AND THEIR PRODUCTS; PREPARED EDIBLE FATS; ANIMAL OR VEGETABLE WAXES. (code 15.01 up to 15.99)**
- **PREPARED FOODSTUFFS; BEVERAGES; SPIRITS AND VINEGAR; TOBACCO AND MANUFACTURED TOBACCO SUBSTITUTES. (code 16.01 up to 24.99)**
  - Preparations of meat, of fish or of crustaceans, molluscs or other aquatic invertebrates.
  - Sugars and sugar confectionery.
  - Cocoa and cocoa preparations.
  - Preparations of cereals, flour, starch or milk; baker's wares.
  - Preparations of vegetables, fruit, nuts or other parts of plants.
  - Miscellaneous edible preparations.
  - Beverages, spirits and vinegar.
  - Residues and waste from the food industries; prepared animal feed.
  - Tobacco and manufactured tobacco substitutes.

### **3.3. THE MARKET.**

In Venezuela there are real market opportunities for all kinds of processed and non-processed food goods, since the Government introduced a new policy of eliminating import restrictions and gradually lowering duties in all these categories. Significant growth on the consumption of imported food goods is shown on the last three years.

Most local importers choose traditional traders suppliers from the American east coast, because they are usually faster, more reliable and they can supply small amounts and qualities of various goods for a single container.

The recent economic recession brought about many changes in Venezuelan lifestyles, an ironically successful market is fancy and deli goods. Obviously sophisticated consumers with high purchasing power noticed that price and quality of local products in some cases were not competitive with imported ones.

### **3.4. COMMERCIAL PRACTICES.**

#### **3.4.1. IMPORT REGULATIONS AND DUTIES.**

Since Venezuela's accession to GATT at the end of 1991, the Government introduced a new policy of gradually lowering import duties and eliminating import restrictions for all kind of food goods and other products.

The current applicable customs tariff schedule is as follows:

- a) Legal classification of products is based on the "NANDINA" system tariff code number for each product according to its category.
- b) There is an Ad-Valorem Duty that goes from 5.0% up to 40.0%. Import tax paid by product entering the country under the General Treatment policy, as a percentage of its cost. There is an additional 5.0% customs service tax.
- c) Since end of 1993 a Value Added Tax (VAT) of 10.0 percent was introduced to all kind of goods and services involved on the production and distribution chain.
- d) A new tax is supposed to be implemented on deluxe deli goods.

#### **3.4.2. QUALITY STANDARDS.**

Imported food goods should be accompanied by a certificate of health, issued by a recognized authority, and must comply with local phytosanitary regulations on quality standards (similar to those in Canada).

Food goods arriving in Venezuela are detained (a maximum of 24 hours), until passed by the Department of Health and Customs inspectors, with the assurance that the product is of acceptable quality for human consumption.

#### **3.4.3. PACKAGING.**

Packaging materials must be safe and hygienic to preserve the quality of the imported food goods in a container and on shelf space. Traders dislike to handle heavy packages in outlets (12 to 15 kilograms).

There are no specifications or regulations on label design, as long as they

are in **Spanish** and include: product name and type, weight or volume in metric system, country of origin, name and address of manufacturer and local importer, grade of product, list of ingredients, durable life, instructions to use (if necessary) and lot number.

#### **3.4.4. SUPPLIER/IMPORTER RELATIONSHIP.**

Venezuelan food goods importers contact suppliers well in advance, in order to have the required products on time, due to the local bureaucratic difficulties involved, which can affect shipments.

Most local importers operate as wholesalers or distributors on a nationwide basis. Some importers may ask for exclusive importing rights, but that of course is negotiable. Efficient handling of transport procedures is vital to success in this very competitive market. A term of delivery not respected will usually mean the cancelation of an order.

Generally, importers have a basic knowledge of the overseas trade network for food goods, but in some cases will need particular assistance. Many of them depend on Florida (Miami) based traders and brokers that supply them a large selection of goods.

#### **3.4.5. PAYMENT METHODS.**

Importers terms can vary but usually, offers should be made F.O.B., although C.I.F. offers may be requested. Form of payment is generally through letter of credit (supported by a bank involved with international trade) after the product has landed in Venezuela and been inspected and approved by local authorities.

Importers and retailers margins are between 20.0% to 25.0% each. Consumer prices at retail stores goes about 80.0% above C.I.F. price, due to operational costs.

#### **3.4.6. DISTRIBUTION.**

##### **3.4.6.1. BY CHANNELS.**

The Venezuelan distribution organization for food goods is quite simple. There are 55,701 outlets nationwide; 85 food wholesalers, 212 large supermarket chains, 2,938 independent supermarkets, 9,515 medium groceries and 42,961

small groceries. Which makes an average of 72 homes per outlet.

Storage and distribution facilities for frozen products and for deli high-value products are limited to metropolitan areas.

#### 3.4.6.2. BY AREA.

The primary market areas are metropolitan and urban (with 36.0% of the total purchasing power). Consolidation of shipments to Caracas, Valencia, Porlamar (Duty Free & Trade Area), Maracaibo and Barquisimeto is a common feature for distribution through the rest of the country.

|                  | <u>POPULATION</u> |               | <u>PURCHASING POWER</u> |
|------------------|-------------------|---------------|-------------------------|
|                  | <u>'000</u>       | <u>%</u>      | <u>%</u>                |
| METROPOLITAN (*) | 5,164,6           | 23.8%         | 29.0%                   |
| OIL STATES       | 3,146,5           | 14.5%         | 13.0%                   |
| EASTERN STATES   | 3,949,4           | 18.2%         | 14.0%                   |
| CENTRAL STATES   | 6,661,9           | 30.7%         | 31.0%                   |
| ANDEAN STATES    | 2,777,6           | 12.8%         | 13.0%                   |
| <b>TOTAL:</b>    | <b>21,700,0</b>   | <b>100.0%</b> | <b>100.0%</b>           |

(\*) Caracas and the metropolitan zone.

#### 3.5. RECOMMENDATIONS.

The following recommendations may facilitate a new supplier's entry into the Venezuelan market:

- a) Develop a relationship with importer or agents.
- b) Enclose a certificate of analysis of the proposed product with a letter of introduction to the importer.
- c) If the importer asks for exclusive rights for the product, include a clause in the contract for a minimum level of annual purchases.
- d) If you can not write your correspondence in Spanish please use English.

Spanish capability in your company is very useful.

- e) When samples are requested, they should be promptly dispatched with a certificate of analysis.
- f) Enquiries from buyers must be immediately answered.
- g) Shipments should conform with samples and delivery schedule on which basis the order was placed.

### 3.6. CONCLUSIONS.

The import of processed and non-processed food goods to Venezuela, requires the closest collaboration between exporters and importers to establish bonds of trust and mutual advantage. Consumers and distributors are aware of the good quality and image of Canadian food goods. However, this is a very difficult and competitive market for new suppliers who must compete with traditional ones in the U.S. and Europe, and satisfy importers on the following key elements: Price, Quality, Consumer Service and Financial Facilities.

### 3.7. VENEZUELAN MARKET FACTS:

- TOTAL POPULATION: 21,7 MM

- TOTAL HOMES: 4,0 MM

- SOCIO-ECONOMIC STRUCTURE:

|              |       |
|--------------|-------|
| HIGH INCOME: | 1.0 % |
|--------------|-------|

|                |        |
|----------------|--------|
| MEDIUM INCOME: | 21.0 % |
|----------------|--------|

|             |        |
|-------------|--------|
| LOW INCOME: | 36.0 % |
|-------------|--------|

|              |        |
|--------------|--------|
| POOR INCOME: | 42.0 % |
|--------------|--------|

|               |               |
|---------------|---------------|
| <b>TOTAL:</b> | <b>100.0%</b> |
|---------------|---------------|

- TOTAL OUTLETS:

|                           | <u>OUTLETS</u> | <u>SALES POWER</u> |
|---------------------------|----------------|--------------------|
| LARGE SUPERMARKET CHAINS: | 212            | 37.0 %             |
| INDEPENDENT SUPERMARKETS: | 2,938          | 50.0 %             |
| MEDIUM GROCERIES:         | 9,515          | 8.0 %              |
| SMALL GROCERIES:          | 42,961         | 5.0 %              |
| <b>TOTAL:</b>             | <b>55,626</b>  | <b>100.0%</b>      |

- HOMES PER OUTLETS: 72

- LARGE FOOD WHOLESALERS: 85

- PRICE ANALYSIS STRUCTURE(\*):

|                 | <u>COST \$</u> | <u>% MARGIN</u> | <u>% ACCUMULATED</u> |
|-----------------|----------------|-----------------|----------------------|
| IMPORTER:       | 100.00         | 15.0            | 15.0                 |
| DISTRIBUTOR:    | 115.00         | 20.0            | 38.0                 |
| RETAILER:       | 138.00         | 30.0            | 80.0                 |
| CONSUMER PRICE: | 180.00         | -               | -                    |

(\*) without VAT.

#### 4. VENEZUELAN TRADE STATISTICS.

##### 4.1. VENEZUELAN AGRIFOOD IMPORTS (IN MM US\$) \*

| <u>SECTORS</u>        | <u>1991</u>  | <u>1992</u>  | <u>% VAR.</u> |
|-----------------------|--------------|--------------|---------------|
| ● ANIMAL PRODUCTS     | 190          | 172          | -9.5          |
| ● VEGETABLE PRODUCTS  | 413          | 523          | 26.7          |
| ● FATS AND OILS       | 162          | 172          | 6.2           |
| ● PREPARED FOODSTUFFS | 299          | 424          | 41.8          |
| <b>TOTAL:</b>         | <b>1,064</b> | <b>1,291</b> | <b>21.3</b>   |

(\*) source: O.C.E.I. Trade Yearbook 1992.

4.2. CANADIAN AGRIFOOD EXPORTS (IN MM CDN\$) \*

| <u>SECTORS</u>        | <u>1992</u> | <u>1993</u> | <u>% VAR.</u> |
|-----------------------|-------------|-------------|---------------|
| ● GRAINS              | 69          | 49          | -28.9         |
| ● VEGETABLES          | 26          | 29          | 11.5          |
| ● PREPARED VEGETABLES | 1           | 2           | 100.0         |
| ● OTHER PRODUCTS      | 2           | 4           | 100.0         |
| TOTAL:                | 98          | 84          | -14.8         |
| S.O.M.:               | 7.6%        | N.A.        |               |

(\*) source: Statistics Canada/Agriculture Canada 1993.

According to Statistics Canada data, Venezuela is ranked number one in Latin America as largest per capita agrifood importer (1992 Cdn\$ Venezuela 4.62, Colombia 3.17 and Mexico 2.28) and the fourth largest market (1992 Cdn\$ 98 millions) in value for Canadian agrifood products in Latin America. Canadian Share of Market of total Venezuelan agrifood imports for 1992 was 7.6 percent.

5. AGRIFOOD LIST OF MAJOR CONTACTS

5.1 ASSOCIATIONS.

1. CAMARA VENEZOLANA DE LA INDUSTRIA DE ALIMENTOS.  
(VENEZUELAN FOOD INDUSTRY ASSOCIATION)  
CONTACT: SIMON NOBILE (PRESIDENT)  
CENTRO EMPRESARIAL LOS RUICES, PISO 5, OFICINA 510,  
AV. DIEGO CISNEROS, CARACAS, P.O. BOX 5159 CARMELITAS.  
TEL.(582)239-9818 FAX.(582)238-3268
2. CAMARA DE VIVERES.  
(FOOD ASSOCIATION)  
CONTACT: ELEAZAR GUILLEN (PRESIDENT)  
EDF. CARCELIA, P.B., LOCAL C, CALLE 600, QUINTA CRESPO,  
CARACAS.  
TEL.(582)41-0764 FAX.(582)483-7427
3. CAMARA NACIONAL DE ENLATADORES DE PESCA.  
(NATIONAL ASSOCIATION OF CANNED FISH)  
CONTACT: ROSA DE ARMAS  
CALLE LOS LABORATORIOS, TORRE BETA, PISO 1, OFC. 103,  
LOS RUICES, CARACAS. P.O. BOX 3673 CARMELITAS 1010.  
TEL.(582)238-1711 FAX.(582)238-0277
4. CAMARA DE COMERCIO DE CARACAS.  
(CARACAS COMMERCE ASSOCIATION)  
CONTACT: FRANCISCO AGUERREVERE (PRESIDENT)  
AV. ANDRES ELOY BLANCO, EDF. CAMARA DE COMERCIO DE  
CARACAS, LOS CAOBOS, CARACAS.  
TEL.(582)571-3222 FAX.(582)571-0050 TLX.24652
5. CAMARA DE COMERCIO VENEZOLANA-CANADIENSE.  
(VENEZUELAN-CANADIAN COMMERCE ASSOCIATION)  
CONTACT: KENNETH JOHNSON (PRESIDENT)  
AV. MIRANDA, PARQUE CRISTAL, TORRE ESTE, PISO 4, LOS PALOS  
GRANDES, CARACAS.  
TEL.(582)285-5667 FAX.(582)285-3280

**5.2. SUPERMARKET CHAINS.**

1. C.A. DISTRIBUIDORA DE ALIMENTOS (CADA)  
CONTACT: ANTONIO MENENDEZ (VICE-PRESIDENT)  
AV. EL ROSARIO, EDF. CADA, LOS CHORROS, CARACAS 1071.  
TEL.(582)283-5832 FAX.(582)284-5113
2. CENTRAL MADEIRENSE C.A.  
CONTACT: JOSE VIERA (GENERAL MANAGER)  
CALLE EL LIMONCITO, KM.1, CARRETERA PETARE-STA. LUCIA,  
EDO. MIRANDA.  
TEL.(582)291-2444 FAX.(582)242-5860
3. AUTOMERCADO TIA.  
CONTACT: MIGUEL BRITO (MANAGER)  
AV. MADRID, EDF. TIA, LA CALIFORNIA NORTE, CARACAS.  
TEL.(582)21-0623 FAX.(582)22-2078
4. CASA PARIS-SUPERMERCADOS VICTORIA.  
CONTACT: ARMANDO PARIS (GENERAL MANAGER)  
CIRCUNVALACION No.2, ZONA INDUSTRIAL MARACAIBO,  
MARACAIBO, EDO. ZULIA.  
TEL. (5861)34-8011 FAX.(5861)34-8619

**5.3. IMPORTERS/DISTRIBUTORS (FRESH & PROCESSED AGRIFOOD).**

1. CONSORCIO COMERCIAL ROBERTO CORREA.  
CONTACT: ROBERTO CORREA (PRESIDENT)  
EDF. ROCO, CALLE 4 CON CALLE 11, LA URBINA, CARACAS.  
TEL.(582)241-1380 FAX.(582)241-1540
2. EXPORTACIONES, IMPORTACIONES Y REPRESENTACIONES HIVE.  
CONTACT: JUAN GIL JIMENEZ (PRESIDENT)  
CALLE EL LORO, EDF. ISABEL, QUINTA CRESPO, CARACAS.  
TEL.(582)41-7261 FAX.(582)483-8225

3. VIVERES CARACAS C.A.  
CONTACT: DAJ KARPEL (GENERAL MANAGER)  
EDF. BOSCHI, CALLE 10, LA YAGUARA, CARACAS.  
TEL.(582)49-7841 FAX.(582)49-7846
4. LA MARINA CARACAS C.A.  
CONTACT: ORLANDO URRIBARRY (GENERAL MANAGER)  
MERCADO MAYOR DE COCHE, EDF. A, LOCAL 31, COCHE,  
CARACAS.  
TEL.(582)681-5430 FAX.(582)681-3331
5. OPERADORA MAXY'S C.A.  
(LARGEST COMMODITY STORE CHAIN)  
CONTACT: FRANCISCO RAMIREZ (VICE-PRESIDENT)  
AV. PRINCIPAL COLINAS DE BELLO MONTE, BELLO MONTE,  
CARACAS.  
TEL.(582)92-0478 FAX.(582)92-0070
6. FRIGORIFICO LARA C.A.  
CONTACT: SALVATORE STELLUTO (PRESIDENT)  
CALLE 500, EDF. HOEL PEREZ, OFC. 4, QUINTA CRESPO,  
CARACAS.  
TEL.(582)41-1948 FAX.(582)483-9066
7. VIVERES NAVARRA C.A.  
CONTACT: JESUS RUIZ DE OTUVA (GENERAL MANAGER)  
HORNO NEGRO A RIO, QUINTA CRESPO, EDF. GONZALEZ-NAVARRA,  
CARACAS.  
TEL.(582)483-8995 FAX.(582)42-4069
8. COMPAÑIA ANONIMA DISTRIBUIDORA DE PRODUCTOS.  
(LINKED WITH SUPERMERCADOS VICTORIA AND DAIRY INDUSTRY)  
CONTACT: EDUARDO FINOL LEON (EXPORT-IMPORT DIRECTOR)  
3a. AV. LAS DELICIAS DE SABANA GRANDE, EDF. LAS DELICIAS,  
MEZANINA, CARACAS 1060-A. P.O. BOX 62424  
TEL.(582)905-3674 FAX.(582)71-4453 TLX.25303

9. INTERNACIONAL DE DESARROLLO LA GRANJA C.A. (FROZEN FOOD)  
CONTACT: JOSE BURG (PRESIDENT)  
AV. LA ESTANCIA, TORRE DIAMEN, PISO 9, OFC. 96, CHUAO,  
CARACAS. P.O. BOX 68855 CARACAS.  
TEL.(582)92-4233 FAX.(582)993-3436
10. INTERNACIONAL DE ALIMENTOS Y DELICATESSES C.A.  
(LARGE DELI DISTRIBUTOR)  
CONTACT: JOSE PIÑERUA (MANAGER)  
CALLE 9 CON 6, EDF. INTERNACIONAL DE ALIMENTOS, LA URBINA,  
CARACAS.  
TEL.(582)241-7475 FAX.(582)241-9369
11. DISTRIBUIDORA SERVIFOOD'S C.A.  
(LARGE DELI IMPORTER/DISTRIBUTOR)  
CONTACT: JOSE ALDARIZ (PRESIDENT)  
CALLE CHAMA, CENTRO COMERCIAL POLO 1, LOCAL PB1-PB2,  
COLINAS DE BELLO MONTE, CARACAS.  
TEL.(582)752-1723 FAX.(582)752-4069
12. MAKRO COMERCIALIZADORA S.A.  
(LARGEST WHOLESALER DISTRIBUTOR)  
CONTACT: JACOB DE JONGE (PRESIDENT)  
AV. ROMULO GALLEGOS CON CARRETERA PETARE-GUARENAS, LA  
URBINA, CARACAS.  
TEL.(582)242-2611 FAX.(582)242-5725

#### 5.4. LIQUEURS AND CONFECTIONERY.

1. WEITZMANN TRADING CO. S.A.  
CONTACT: WALTER WEITZMANN (GENERAL MANAGER)  
ESQ. LAS MADRICES, EDF. ROLIZ, PISO 3, OFC. 32, CARACAS.  
TEL.(582)561-5847 FAX.(582)562-1783
2. H.L. BOULTON & CO.  
CONTACT: WILLIAM BOULTON (GENERAL MANAGER)  
AV. UNIVERSIDAD, TORRE EL CHORRO, PISO 11, CARACAS.  
TEL.(582)564-1822 FAX.(582)563-8176

3. C.A. DISTRIBUIDORA CHUMACEIRO.  
CONTACT: RONALD CHUMACEIRO (GENERAL MANAGER)  
CALLE LAS MERCEDES, No. 25, EDF. CORVENCAN, CARACAS.  
TEL.(582)261-1239 FAX.(582)261-1913
4. DISTRIBUIDORA BENEDETTI C.A.  
CONTACT: LUIS VEGAS (MANAGER)  
AV. LIBERTADOR, MULTICENTRO EMPRESARIAL DEL ESTE,  
EDF. LIBERTADOR, TORRE C, PISO 2, CHACAO, CARACAS.  
TEL.(582)32-3961 FAX.(582)261-7262
5. TAMAYO & CIA. S.A.  
CONTACT: LUIS RIVAS (MARKETING MANAGER)  
CALLE SOROCAIMA, EDF. ATRIUM, PISO 7, EL ROSAL, CARACAS.  
TEL.(582)905-1611 FAX.(582)905-1622
6. EMPRESAS POLAR (DIRECCION DE IMPORTACIONES)  
(BEER, CORN MEAL, SNACKS AND ICE CREAM)  
CONTACT: RAUL MAESTRE (EXPORT/IMPORT DIRECTOR)  
EDF. FUNDACION POLAR, 2a. TRANSVERSAL, LOS CORTIJOS DE  
LOURDES, CARACAS 1071.  
TEL.(582)239-1990 FAX.(582)239-7120

#### 5.5. FISH.

1. ALIMENTOS EL FARO C.A.  
CONTACT: RAIMUNDO AMILIBIA (MANAGER)  
3a. TRANSVERSAL NORTE, No 1, GUAICAIPURO, CARACAS.  
TEL.(582)571-5833 FAX.(582)571-4239
2. ALIMENTOS MARGARITA C.A.  
CONTACT: EDUARDO OROPEZA (MANAGER)  
CALLE LOS LABORATORIOS, EDF. TORRE BETA, PISO 1, OFC.103,  
LOS RUICES, CARACAS.  
TEL.(582)238-1711 FAX.(582)238-0277
3. CONSERVAS ALIMENTICIAS LA GAVIOTA S.A.  
CONTACT: FRANCISCO MARTINEZ (MANAGER)  
CALLE SANTA ROSA, No. 5, GUAICAIPURO, CARACAS.  
P.O. BOX 3275 CARACAS 1070-A.  
TEL.(582)573-3332 FAX.(582)572-4953

4. PROEBA C.A.  
CONTACT: RICARDO CASTRO IGLESIAS  
CARRETERA PETARE-GUARENAS, Km. 4, QTA. LA FLORENCIA,  
SECTOR LA FLORENCIA, PETARE, EDO. MIRANDA.  
P.O. BOX 75944 EL MARQUES.  
TEL.(582)291-2082 FAX.(582)291-2958
5. PRODUCTOS MAR C.A.  
CONTACTO: CARLOS TOVAR  
AV. URDANETA, ESQ. LAS IBARRAS, EDF. PASAJE LA SEGURIDAD,  
TEL.(582)561-1021 FAX.(582)563-2070
- 5.6. **FAST FOOD CHAINS.**
  1. BURGER KING AND PIZZA HUT.  
CONTACT: MARIA GOMEZ (GENERAL MANAGER)  
AV. ROMULO GALLEGOS, EDF. OCAÑA, PISO 2, EL SEBUCAN,  
CARACAS 1071.  
TEL.(582)284-5113 FAX.(582)284-6256
  2. DUNKIN DONUTS DE VENEZUELA.  
CONTACT: HAYDEE OROZCO (GENERAL MANAGER)  
CALLE 3-A, EDF. CENTRO PROFESIONAL LA URBINA, PISO 9,  
SUITE A, LA URBINA, CARACAS 1070.  
P.O. BOX 2023 CARACAS 1010-A  
TEL.(582)241-5506
  3. Mc DONALDS (BURGERS)  
CONTACT: ROBERTO ALVARADO (PRESIDENT)  
CENTRO COMERCIAL CIUDAD TAMANACO, TORRE C, PISO 13, OFC.  
13-01, CHUAO, CARACAS 1060.  
TEL.(582)261-1236 FAX.(582)261-1559
  4. TROPIBURGER S.A. (BURGERS, PIZZAS, DONUTS & DELIS)  
CONTACT: MARCIAL GONZALEZ (GENERAL MANAGER)  
CALLE PARIS, QTA. SAN ANTONIO, LAS MERCEDES, CARACAS 1060  
TEL.(582)92-3933 FAX.(582)92-5495

5. ARTURO'S - PREPARADOS ALIMENTICIOS INTERNACIONALES C.A.  
(FRIED CHICKEN)  
CONTACT: DANIEL TORRES (PRESIDENT)  
CALLE 10, No. 14, EDF. PAICA, LA URBINA, CARACAS 1070.  
P.O. BOX 76843 EL MARQUES, CARACAS.  
TEL.(582)241-0155 FAX.(582)241-3665

5.7. **DAIRY PRODUCTS AND FRUIT JUICES.**

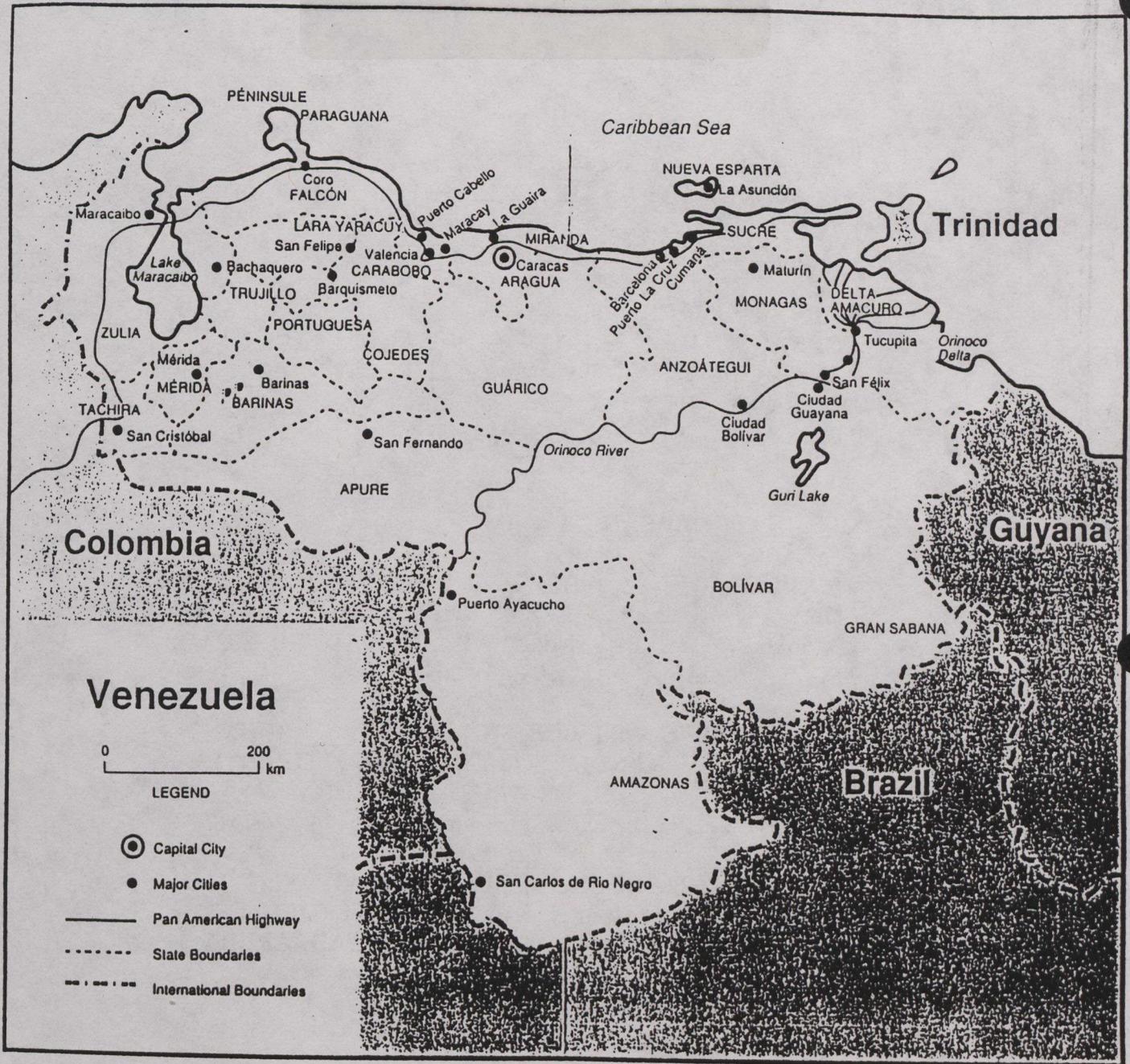
1. INDULAC C.A.  
CONTACT: HECTOR LEZAMA (COMERCIAL DIRECTOR)  
AV. SAN FRANCISCO, EDF. INDULAC, COLINAS DE LA CALIFORNIA,  
CARACAS 1070.  
P.O. BOX 1949 CARACAS 1010-A  
TEL.(582)213-322; FAX.(5875)81-1330
2. INDOSA  
CONTACT: RODRIGO AGUDO (GENERAL MANAGER)  
AV. SAN FRANCISCO, EDF. INDULAC, COLINAS DE LA CALIFORNIA,  
CARACAS 1070.  
TEL.(582)214-722
3. ILAPECA  
CONTACT: FRANCISCO COSTA (GENERAL MANAGER)  
3a. AV., EDF. LAS DELICIAS, PISO 3, LAS DELICIAS, CARACAS  
1050.  
TEL.(582)719-871 FAX:(582)726-698
4. PROLACA  
CONTACT: ENRIQUE FONTESILLA (GENERAL MANAGER)  
CALLE BOLIVAR, EDF. DISTRIBUIDORA PROLACA, CATIA, CARACAS  
1030.  
TEL.(582)890-723
5. SILSA  
CONTACT: JORGE BEZARA (PRESIDENT)  
AV. LA ESTANCIA, CENTRO BANAVEN, TORRE B, PISO 6, OFC.62,  
CHUAO, CARACAS 1060.  
TEL.(582)913-011 FAX.(582)928-429 TLX.24898

6. UPACA  
CONTACT: CARLOS HERNANDEZ (GERERAL MANAGER)  
AV. LOS ATICOS, No. 109-42, MARACAIBO, CP 4001,  
EDO. ZULIA.  
TEL.(5861)22-210
7. FRICA  
CONTACT: NEMESIO TORRES (PRESIDENT)  
CALLE HANS NEUMANN, EDF. CORIMON, PISO 1, LOS CORTIJOS DE  
LOURDES, CARACAS 1071.  
TEL.(582)203-5700 FAX.(582)239-9343 TLX.25218 CORMO VC
- 5.8. MARGARITA ISLAND DUTY FREE.
  1. CAMARA DE IMPORTADORES Y EXPORTADORES DEL PUERTO LIBRE  
DE MARGARITA.  
(IMPORTERS & EXPORTERS ASSOCIATION OF MARGARITA'S FREE  
PORT)  
CONTACT: FRANK ARMAS (EXECUTIVE DIRECTOR)  
CALLE CHARAIMA ENTRE SAN RAFAEL Y FRATERNIDAD,  
PORLAMAR, EDO. NUEVA ESPARTA.  
TEL.(5895)61-0108 FAX.(5895)63-2222 TLX.95542 CIPL
  2. SIGO S.A.  
CONTACT: MILTON MARTINEZ (DIRECTOR)  
AV. JUAN BAUTISTA ARISMENDI, EDF. LA PROVEDURIA,  
PORLAMAR, EDO. NUEVA ESPARTA. P.O.BOX 369  
TEL.(5895)22-150 FAX.(5895)61-6256 TLX.95114 MAXIM
  3. LA BODEGA DE BLAS C.A.  
CONTACT: URBANO ALBANI (MANAGER)  
AV. SANTIAGO MARIÑO, LA BODEGA DE BLAS, PORLAMAR, EDO.  
NUEVA ESPARTA.  
TEL.(5895)61-8268 FAX.(5895)61-3579 TLX.95290 URG1
  4. SELEX DE VENEZUELA C.A.  
CONTACT: GIONANNI INCANDELA (MANAGER)  
AV. CIRCUNVALACION, CENTRO COMERCIAL RENE, LOCAL B,  
MERCADO DE CONEJEROS, PORLAMAR, EDO. NUEVA ESPARTA.  
TEL.(5895)61-5522 FAX.(5895)61-0545 TLX.95512 SELEX VC

5. LEMCA.  
CONTACT: FRANCISCO ROTEMBERG  
AV. MIRANDA, EDF. TELECARIBE, PORLAMAR, EDO. NUEVA  
ESPARTA.  
TEL.(5895)24-244 FAX.(5895)61-8267 TLX.95124
6. RATAN DE MARGARITA.  
CONTACTO: JUAN MARTIN (GENERAL MANAGER)  
AV. 4 DE MAYO, EDF. COMERCIAL RATTAN, PORLAMAR, EDO.  
NUEVA ESPARTA.  
TEL.(5895)61-7911 FAX.(5895)61-8021

5.9. DUTCH CARIBBEAN ISLANDS.

1. CHAMBER OF COMMERCE AND INDUSTRY CURAÇAO.  
CONTACT: ROBERT WILLEMS (DIRECTOR)  
KAYA JUNIOR SALAS, No. 1, WILLEMSTAD, CURAÇAO.  
TEL.(5999)61-3918 FAX.(5999)61-5652
2. CHAMBER OF COMMERCE AND INDUSTRY ARUBA.  
CONTACT: ALEXANDER SOULAGNIER (PRESIDENT)  
ZOUTMANSTRAAT 21, ORANJESTAD, ARUBA.  
TEL.(2978)21-566 FAX.(2978)33-962 TLX.5174 KVKAR
3. ARUBA TRADE AND INDUSTRY ASSOCIATION.  
CONTACT: HERMAN E.N. KUIPERI (DIRECTOR)  
L. G. SMITH BOULEVARD 23, ORANGESTAD, ARUBA.  
TEL.(2978)27-593



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