

**SCOUTING MISSION to SÃO PAULO, BRAZIL**



**LIVRES CANADA BOOKS™**

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February 22-26, 2010

## MEMBERS OF THE DELEGATION

Margie Wolfe

President and Publisher, Second Story Press

Michel Maillé

Executive Director, Les Éditions Fides

Philip Cercone

Executive Director and Senior Editor, McGill-Queen's University Press

Dênya Rabêlo Castro

Interpreter

Christy Doucet

Programs Manager, Livres Canada Books

Livres Canada Books  
Suite 504 1 Nicholas Street  
Ottawa, Ontario K1N 7B7  
Tel (613) 562-2324

Fax (613) 562-2329

Email :[info@livrescanadabooks.com](mailto:info@livrescanadabooks.com)

Web [www.livrescanadabooks.com](http://www.livrescanadabooks.com)

Canada 

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## **Introduction and Background**

With a population of 190 million, Brazil is the 8<sup>th</sup> largest economy in the world, and growing quickly. Sustained economic growth combined with solid institutions, a democratic government, and a growing consumer market, make the country a stable environment for international business.

The Brazilian publishing market reached \$1.9 billion USD in sales for over 330 billion book copies in 2008, an increase of nearly 10% over 2007 according to the Foundation Institute of Economic Research of the University of São Paulo. The Brazilian Book Chamber states that 530 active publishing companies had issued at least five books in one year or produced up to 10,000 copies in 2008; however, the number of companies in the industry is upwards of 1,600.

Brazil faces its own set of challenges: a low literacy rate and, with only 2,676 retail locations, the main problem for publishers is the limited distribution of books. Publishers are countered by a large book-buying population (95 million) and a very successful door-to-door sales system that offers books directly to the consumer. The poverty levels in Brazil have also dropped dramatically in the past two decades. The percentage of Brazilians who live in extreme poverty fell from 8.8% of the population in 1990, to 4.2% in 2005. In 2007, for the first time, the United Nations included Brazil in the group of countries with the highest degree of human development.

The economy in Brazil is divided into 5 income brackets from A to E. Roughly 20 million Brazilians have migrated up from income brackets D and E to C from 2002 to 2007. Consumers from income bracket C, the middle class, are today estimated to number 97 million, or around 52% of the country's population. Much of the publishing activity in Brazil is currently focused on this growing middle class and the resulting consumer market expansion.

The Brazilian government has also launched efforts to encourage reading and to support the book industry in Brazil through annual investments of \$450 million USD in text books for libraries, primary and secondary schools, and other book acquisition programs. This amounts to the purchase of 50% of the editorial production of Brazil, and makes it clear that the great opportunity exists for educational and children's publishing. With a growing middle class and a strong economy, Brazilian publishers are becoming more aggressive in buying rights in all areas of publishing.

The objective of Livres Canada Books in organizing the scouting mission to São Paulo was to report on Brazil as a potential market for Canadian publishers in terms of rights sales and distribution. In view of the increasing interest in this country, and taking into account that the Bienal Book Fair is held in São Paulo this year, 2010 presented an excellent opportunity for the Association and the Canadian publishing industry to seek trusted intelligence in this market. The Livres Canada Books delegation consisted of three Canadian publishers with an active interest in or dealings with the Brazilian market the Livres Canada Books Programs Manager, and Brazilian interpreter and publishing consultant, Dênya Rabêlo Castro.

Delegates met with relevant Brazilian publishers, distributors, associations and government officials in order to gain an understanding of the different facets of the Brazilian publishing market. The delegation also met with officials at the Canadian Consulate General to discuss possible future support and to build upon the work and findings of the scouting mission.

Following the scouting mission, Livres Canada Books felt that a Canadian presence at the Bienal Book Fair in São Paulo would build on the momentum of the mission, and will therefore be inviting publishers to exhibit on a Canadian Collective stand in August, 2010.

### **The Children's Book Trade Perspective**

When it was suggested that we undertake this scouting mission, we felt confident Brazil was a country where Canadian publishers could do some excellent business. This trip reinforced that belief, but only for specific sectors.

During the week-long mission, we had individual meetings with publishers, wholesalers, distributors and retailers as well as a meeting with members of the national publishing association and a session with a the Canadian Consulate, all in São Paulo, Brazil

São Paulo is a huge city in a huge country. It's also a city for work, not play. Those who live in São Paulo pride themselves on long work days and, as with many large cities situated nearby one another, they have a rivalry with Rio de Janeiro, which they consider to be the less hard-working and more frivolous of the two cities. You can't even find a bus tour in São Paulo. The population is dense at about 18 million, and like LA, it has no city centre, really just districts, and we seemed to be in cabs all the time. Because of its size and the immense traffic, it is very hard for scheduled meetings to be held on time. Traffic and heavy rains can often cause long delays.

The size of Brazil has also contributed to a number of country-specific phenomena. First, there exists a huge door-to-door bookselling business. We met with the President of the Associação Brasileira de Fufusao do Livro (ABDL), an association of agents and distributors who sell books this way. There are more than 30,000 sales people who sell titles throughout the country. The variety of books include children's, religious, technical and professional titles, most of which are part of a series to encourage reader loyalty. Think of the old encyclopedia sales people in North America, and of consumer brands that capitalize on direct marketing. Avon, for example, is larger in Brazil than in the United States and includes many books in their catalogues. This phenomenon is also partially due to the fact that book stores are few, a scant 2600 locations for a population of 200 million. You can travel 1000 miles in-between book retailers.

A very interesting factor in people's publishing programs is how the population is officially stratified into A,B,C and D classes, the highest socio-economic class being A. Some publishers focus on the higher end, others target what they call the lower or C and D classes. Typically, the C & D groups are the focus of the door-to-door publishers.

The potential for children's publishing in Brazil is strong for a number of reasons. Due to the fact that Brazil has a very low literacy rate, the government on both the municipal and national levels has created a book purchase program, which means that three

selected titles are bought in quantities from 5,000 to 44,000 copies. This has become a major target for publishers, and has created an increased need for teachers guides. Up to 12 submissions in Portuguese per publisher, per year is allowed. A couple of Second Story titles that were bought by a Brazilian publisher have already been selected. As a result of this trip to Brazil another publisher, aware of these sales, has bought four more titles from the same series at the Bologna Children's Book Fair. In the various publisher meetings we had, including one speed-dating -like event organized by the Câmara Brasileira do Livro (the Brazilian Book Chamber) with approximately thirty Brazilian publishers, the importance of the educational market was reinforced.

Another big factor for children's publishing, is the door-to-door market. There are relatively few bookstores to service the huge and widespread population of Brazil (roughly 2,600 retail outlets). This organized service of 30,000 sales people working for a variety of specialty publishers sell directly to the consumer door-to-door. The door-to-door market buys children's, youth, religion, technical and professional titles.

We met with Donaldo Walter Buchweitz of Ciranda Cultural Editora, who is referred to as the "King" of this type of bookselling, has 52 sales representatives selling throughout the country. The owner of Ciranda Cultural Editora was already booked up for the Bologna Children's Book Fair, but is available to meet at Book Expo America. He is looking for fairly inexpensive series titles, which he will sell for 5 years. Some backlist will sell longer, but is more often Brazilian. He will print 1,000,000 copies per year of a dictionary with a list price of \$1.00. This buyer will also pay \$1.20 US per unit for picture books, no negotiation, when he joins a co-production. He buys and sells packaged licensed products, paperback fiction, as well as cloth and board books. He will pay between 4-10% royalties (most often 5%) and preferably his transactions will take place in American dollars (90% of the time). It is therefore generally recommended to use an American freight forwarder (eg: Clark Worldwide or Activeair) in order to consolidate invoicing for less bank charges. This market is for both children's and adult titles, and is high volume, low prices.

Other Publishers to note:

Melhoramentos : A large house who does children's books as well as adult cookbooks and travel. We as well as a number of other Canadian publishers already sell to them.

The education program mentioned above is huge for them (70% of their sales) and so they are looking for potential titles that would work for the schools. This publishing house will typically publish 2,000-3,000 copies of a title with a price point of \$70 USD and 20,000 copies with a price point of \$3-4, but cannot sell \$15-20 books.

Cancao Nova does children's and religious books. It reminds me a bit of a small Bayard.

Editora do Brasil sells a lot to schools, especially to private schools and is looking at picturebooks.

Callis, who has bought from several Canadians, does some lovely picture books herself which she is trying to sell. Callis also provides a number of workshops for teachers on how to use their books, for example, teaching timelines for use with their biographies. They publish supplementary material and participate in a lot of government programs with books for ages 6-14.

Campanhia Das Letras publishes quality children's and adult fiction, non-fiction and pocketbooks, as well as academic titles (anthropology, history, sociology) and some, but very little, poetry. Their list includes a significant amount of translation. They have bought from Groundwood and McClelland & Stewart. They only do the trade and educational markets. They do not attend Bologna at the moment, but attend both the London and Frankfurt book fairs.

Cedic is a mother and son team who are mostly looking to sell, but who do some of the most fabulous board and novelty books I have ever seen. They sell children's books in the door-to-door market. Their bestsellers are pedagogical with a mixture of education and Brazilian topics.

DCL: They have spent 42 years in the Brazilian market, and are leaders in the door-to-door market. They have bought rights to Disney and Marvel but are also looking for other educational materials and for reference, mystery, and Protestant-based religious titles on the adult side.

Buying on the adult side seems much more conservative. There doesn't appear to be much buying beyond bestsellers, some prizewinning literary, professional, semi-scholarly and technical titles. Only one of the publishers we met (Companhia das Letras) has already bought some adult fiction from Canada, including books by Alice Munro, Alberto Manguel and Anne Michaels.

In the retail chains we visited, Livraria da Vila and Livraria Cultura, which were quite stunning, we did see English-language sections. Most were bestsellers or technical/professional books. There were also large children's sections filled with translations of American mass market or branded books. The retail market has grown significantly within the last five years, and now hosts author readings, cultural cafés, and has expanded into online sales, which have now become massively important. However, the number of Brazilians who have a personal computer is few, and as such, the publishing industry is slowly joining the rest of the world in providing e-book formats. Companhia Das Letras, for example, had planned to launch its first 15 e-books in March and April of 2010. Melhoramentos started their digital publishing program by selling individual recipes from their cookbooks to iphones.

For those interested in purchasing rights, Brazil does some beautiful children's books, particularly picture books with some board and novelty books as well. We also saw some stunning cookbooks that might work well here.

Overall, it was a successful and informative trip. There are some strong possibilities for sales both in the short and long term. Certainly, we are finding that some of our meetings are already generating interest and sales and a return visit to the São Paulo Book Fair is recommended.

### **French-language Trade perspective**

Brazil offers some very real opportunities for Francophone publishers in 2010. The economy is growing and the number of readers is expected to increase substantially over the next few years, hence the emphasis on publishing children's books in Brazil. In addition, a middle class is emerging with considerable purchasing power. Some of the more promising sectors are listed below.

Generally speaking, the publishers we met confirmed that they are looking for:

- books for children, teens and young adults (fiction and non fiction);
- books for adults (fiction and non-fiction, social sciences).

More specifically...

#### *Children's books*

Of prime significance is the importance attached to education and reading programs by the various levels of government. Schools receive major funding to purchase not only materials relevant to existing programs and produced by Brazilian publishers, but also resources that we would qualify as complementary (as opposed to approved curriculum material). Keeping in mind that Brazilian publishers prefer to work from English rather than French, Francophone publishers of children's books would still do well to develop ties with Brazilian publishers working in the same genre.

#### *Practical books*

Brazilians love to eat well. Therefore, there is likely to be a strong market for cookbooks. This is an avenue to be explored.

#### *Religious books*

With a predominately Catholic population in Brazil (74%), there is considerable demand for books on spirituality as well as books devoted to liturgy and the catechism. Several major Brazilian publishers have significant religious lists and represent an opportunity for publishers with similar interests.

On a more general note, titles devoted to various aspects of the religious experience might also prove popular in Brazil. For example, Brazilians are fascinated by spiritualism.

It is important to note that it is essential to have a catalogue in order to do business in Brazil.

## **The Scholarly Perspective**

The potential for scholarly books for both English and French in Brazil is currently not as promising and exciting as it is for children's books. In many ways scholarly books face the same challenges as trade fiction and non-fiction. However, given the recent growth of the Brazilian economy, its ever strengthening currency, and the burgeoning of new, upscale bookstores -- in some cases more upscale than Chapters/Indigo in Canada -- in the country's major cities, such as São Paulo, Rio de Janeiro, Salvador, Brasilia, Fortaleza and Belo Horizonte, the near future prospects for exporting both scholarly and trade books published in Canada is promising.

A great deal of money is being put into the Brazilian book chain and educational systems and it should have a payoff in the near future. There are few indigenous Brazilian presses that specialize in publishing scholarly books and those that do delve in the genre tend to be trade publishers, which are also not many. But entrepreneurs are getting into publishing, or are expanding their lists, and a good way to grow is to purchase rights to quality scholarly/trade books that have worked well elsewhere in the world.

In some cases departments in Universities do publish, but they do not seek out Canadian publications at this time. Our trip was a first step in rectifying this tendency and we were enthusiastically received. The central government of Brazil shares with the states and private associations the responsibility for institutions of higher learning. Brazil contains more than 900 such institutions (including 73 universities, about the same number as Canada for a country of 190 million people), which have a combined annual enrollment of about 2 million students. Among the leading universities are the University of Brasília (1961) in Brasília; the University of São Paulo (1934); the Pontifical Catholic University of Campinas (1941); the Federal University of Rio de Janeiro (1920); and the Pontifical Catholic University of Rio Grande do Sul (1948), in Porto Alegre. Other institutions include schools of medicine, public health, law, social sciences, engineering, agriculture, forestry, and mining. Most states maintain public libraries in their capital cities; some have suburban branches. Most cities have public library systems. In Rio de Janeiro, the National Archive contains a collection primarily concerned with Brazilian history and the National Library, also in Rio de Janeiro, holds some 6 million books. The

University libraries stock a rich array of scholarly and non-fiction books in Brazilian Portuguese, but also in English as the educated Brazilian of today has a good reading knowledge of English.

There are today approximately some 1,700 bookshops in all of Brazil and they stock books principally in sciences, humanities, social sciences, technology, business, and health and nutrition. How-to books are very popular so one finds books on cigars for men, books on how to fold napkins for women, illustrated books for architects, and books for medicine and business. Mass market paperbacks are usually available in English – MacMillan for example has a sales force of some 40 sales reps who sell their whole list; mostly children and educational, but also trade and scholarly.

There are two sales potentials for scholarly books in Brazil: selling books primarily in the English language through representatives and wholesalers in the Brazilian market; and translations. The former is more common. There are two importers who import English-language books for bilingual schools (Portuguese and English), top level schools which offer curriculum in English, and universities. As well, online sales consist massively of imported English, and Spanish publications, as well as books from Portugal (Portuguese-Brazilian is different from European Portuguese, although an agreement was signed recently by the two countries to standardize the two) and the buying public prefers Brazilian websites as opposed to foreign ones, even including one whose namesake is Amazon.com!

There are three main company importers: Cultura, Saraiva, and SBS and these download the titles into their own websites. One of these companies reported a sales increase of 35% in 2009, over sales in 2008. These companies place selected English books in bookstores, including their own as is the case with SBS, which has a number of bookstores throughout Brazil. “Door to door” sales are big in Brazil and in some genres, such as scholarly, up to half the sales of scholarly/professional books imported can be sold “door to door” (one of the largest for children, for example, is Avon in whose catalogue publishers’ books and other products other than beauty are carried). This system evolved because bookstores were once few and far between.

Today because of security and crime reasons, affluent buyers live in protected, “compound” areas and it is more difficult to transact such sales. Responding to this then is internet marketing which is just being introduced (a type of “virtual door to door” claimed one person who has just gotten into this field). Scholarly and high-end specialized books are sold directly through this “door to door” method, such as to embassies and consulates, businesses, professional locations (medical, pharmaceuticals, lawyers), etc. Discounts from the list price of scholarly books are purchased at 35-40%; 50% for trade; and 60% for mass market. Payment terms are 150 days, 120, and 90 days. Brazilian importers access English books primarily from the USA and are air freighted out of New Jersey or Indianapolis, Indiana. Thus invoices are in US dollars.

There are some 12 university libraries that purchase English-language scholarly books on a regular basis, and government departments are a good source of books in areas such as public policy, health, education, and nutrition. In some cases there are publishers who publish in specific niches and these are interested in carrying books of scholarly, foreign presses on the same topic – for example Segmenta Pharma, which is interested in books on health and medicine, wishes to distribute some 60 titles on the list of McGill-Queen’s University Press to its customer-base of doctors, pharmaceutical companies, health professionals, etc.; and at the same time to seriously consider translating into Portuguese a few of the more trade-oriented titles for these professional individuals.

Another way of selling books is through translation rights and here the Brazilian publishers are interested in books dealing with South American subject matter, or world events. Here both Francophone and Anglophone Canadian publishers stand an equal chance of selling translation rights. Brazilian publishers look for translation rights at the Frankfurt Book Fair, Guadalajara, and their own Book Fair, which alternates yearly between São Paulo and Rio. As more publishers are located in São Paulo than Rio, the former provides better opportunities to sell translation rights. Books on Canadian subjects are a non-starter as possible titles for rights sales. But, if a Canadian publisher has a title on a South American subject, then there are good opportunities in Brazil.

In the past Brazilian publishers have typically looked for translation of such books in the USA, UK, or Europe, but they are now looking further afield; and Canada is one such new source. But the scholarly books in question have to be on broad subject matters and must appeal to an educated Brazilian audience. The number of houses in Brazil interested in scholarly books is not large, but we were repeatedly told that such publishers are emerging as Brazil's economy expands further. It is evident from statistics that more and more individuals are going to university, professorial and professional ranks are swelling, and new quality bookstores are being built at a rapid pace, especially in São Paulo. From our trade mission, I would say that scholarly and trade publishers, both Francophone and Anglophone, should go to the upcoming São Paulo Book Fair. There are good opportunities to sell translation rights, not only to the more established houses but to smaller and emerging Brazilian publishers, which are looking for proven quality books and which do not go to the Frankfurt and Guadalajara book fairs.

## APPENDIX – CONTACTS

### **Abrelivros (Association of scholarly and educational publishers)**

---

Contact: Cristina Roberts  
Title: Director  
Address: Rua Turiassu, 143 – Conjs. 101/102 –cep: 05005-001 São Paulo SP  
Tel.: 11 3826-9071  
Fax: 11 3666-2801  
Email: [abrelivros@abrelivros.org.br](mailto:abrelivros@abrelivros.org.br)

### **Associação Brasileira de Fomento do Livro (ABDL)**

---

Contact: Luis Antonio Torelli  
Title: President  
Address: Rua Marques de Itu, 408 cjs 71/72 Vila Buarque CEP:01223-000 São Paulo SP  
Email: [abd1@abdl.com.br](mailto:abd1@abdl.com.br)  
Website: [www.abdl.com.br](http://www.abdl.com.br)

### **Editora do Brasil**

---

Contact: Felipe Ramos Pletti  
Title: Publisher  
Address: Rua Conselheiro Nébias no. 887 01203-001 São Paulo SP  
Tel.: 11 3226-0211  
Email: [felipe@editoradobrasil.com.br](mailto:felipe@editoradobrasil.com.br)  
Website: [www.editoradobrasil.com.br](http://www.editoradobrasil.com.br)

### **Callis**

---

Contact: Miriam Gabbai  
Title: Publisher  
Address: Rua Oscar Freire, 379 – 6 º andar 01426-001 São Paulo SP  
Tel.: 11 3068-5600  
Fax: 11 3088-3133  
Email: [Miriam@callis.com.br](mailto:Miriam@callis.com.br)  
Website: [www.calliseditora.com](http://www.calliseditora.com)

### **Câmara Brasileira do Livro (Brazilian Book Chamber)**

---

Contact: Cristina Lima  
Title: Executive Manager  
Address: Rua cristiano Viana, 91 Pinheiros 05411-000 São Paulo SP  
Tel.: 55 11 3069-1300  
Fax: 55 11 3069-1303  
Email: [cristinalima@cbl.org.br](mailto:cristinalima@cbl.org.br)  
Website: [www.cbl.org.br](http://www.cbl.org.br)

Contact : Dolores Manzano  
Title: CBL- APEX Project Manager  
Email: [projetoapex@cbl.org.br](mailto:projetoapex@cbl.org.br)

Contact: José Henrique Grossi  
Title: Coordinator of the Bienal Book Fair 2010  
Email: [jhgrossi@cbl.org.br](mailto:jhgrossi@cbl.org.br)

## **Cedic**

---

Contact: Gislene Cavalheiro  
Address: Centro Difusor de Cultura Ltda. Av. Francisco Sales, 504 –Floresta CEP: 30150-220  
Belo Horizonte MG  
Tel.: 55 31 3224-3553  
Fax:  
Email: [bruin@uol.com.br](mailto:bruin@uol.com.br)  
Website: [www.cedicbrasil.com.br](http://www.cedicbrasil.com.br)

Contact: Carlos Cavalheiro  
Email: [ccavalheirof@gmail.com](mailto:ccavalheirof@gmail.com)

## **Ciranda Cultural**

---

Contact: Donaldo Walter Buchweitz  
Address: Rua Frederico bacchin Neto, 140 – Cj. 06 CEP: 05396-100 Pq.dos principes – São Paulo SP - Brazil  
Tel.: 55 11 3761 9500  
Email: [donaldo@cirandacultural.com.br](mailto:donaldo@cirandacultural.com.br)  
Website: [www.cirandacultural.com.br](http://www.cirandacultural.com.br)

## **Companhia Das Letras**

---

Contact: Ana Paula Hisayama  
Title: Editor  
Address: Rua Bandeira Paulista 702 cj 32 04532 002 São Paulo SP  
Tel.: 11 3707 3500  
Fax: 11 3707 3501  
Email: [ana.paula.hisayama@companhiadasletras.com.br](mailto:ana.paula.hisayama@companhiadasletras.com.br)

Contact: Marcelo Levy  
Title: Commercial Director  
Email: [marcelo.levy@companhiadasletras.com.br](mailto:marcelo.levy@companhiadasletras.com.br)

## **Consulate General of Canada**

---

Contact: Eelco H. (Ed) Jager  
Title: Consul & Senior Trade Commissioner  
Address: Av. Das Nações Unidas, 12.901 16<sup>th</sup> floor Terre Norte 04578-000 São Paulo SP -Brazil  
Website: [www.brazil.gc.ca](http://www.brazil.gc.ca)  
Email: [ed.jager@international.gc.ca](mailto:ed.jager@international.gc.ca)  
Phone: 55 11 5509 4302

Contact: Fernanda Whitaker  
Title: Trade Commissioner  
Email: [fernanda.whitaker@international.gc.ca](mailto:fernanda.whitaker@international.gc.ca)  
Phone: 55 11 5509 4363

Contact: Dina E. Thrasher  
Title: Media Relations and Public Affairs Officer  
Email: [dina.thrasher@international.gc.ca](mailto:dina.thrasher@international.gc.ca)  
Phone: 55 11 5509 4316

## **Contraponto Editora**

---

Contact: Cesar Benjamin  
Title: President

Address: Avenida Franklin Roosevelt, 23 Sala 1405. Centro, CEP 20021-120 Rio de Janeiro - RJ  
Tel.: 55 21 2544-0206  
Email: [contato@contrapontoeditora.com.br](mailto:contato@contrapontoeditora.com.br)  
Website: [www.contrapontoeditora.com.br](http://www.contrapontoeditora.com.br)

Contact: Teresa Dias Carneiro  
Email: [contato@contrapontoeditora.com.br](mailto:contato@contrapontoeditora.com.br)

#### **DCL –Difusão Cultural do Livro**

---

Contact: Otacilia de Freitas  
Title: Rights Department  
Address: Rua Manoel Pinto de Carvalho, 80, 02712-120 São Paulo SP  
Tel.: 11 3932-5222  
Fax: 800 7707-105  
Email: [otacilia@editoradcl.com.br](mailto:otacilia@editoradcl.com.br)  
Website: [www.editoradcl.com.br](http://www.editoradcl.com.br)

#### **Disal**

---

Contact: Humberto Lima  
Title: Sales  
Address: Av. Marques de São Vicente, 182 Barra Funda – CEP 01139-000 São Paulo SP  
Tel.: 11 3226-3100  
Fax: 800 7707-105  
Email: [humberto@disal.com.br](mailto:humberto@disal.com.br)

Contact :Carlos Eduardo Tristão  
Title: Marketing Manager  
Email: [cadu@disal.com.br](mailto:cadu@disal.com.br)  
Website: [www.disal.com.br](http://www.disal.com.br)

Contact :Cosme Barreto  
Title: Sales  
[vip@disal.com.br](mailto:vip@disal.com.br)  
Website: [www.disal.com.br](http://www.disal.com.br)

#### **Editora Fapi**

---

Address: Avenida Saramenha, 170 bairro: Guarani Belo Horizonte – MG CEP: 31840-220 SP  
Tel.: 55 31 3304-3322  
Fax: 55 31 3433-2250  
Website: [www.editorafapi.com.br](http://www.editorafapi.com.br)

#### **Humphrys Roberts Associates**

---

Contact: Terry Roberts  
Title: Director  
Address: Caixa Postal 801, Agencia Jardim da Gloria, 06709-970 Cotia SP  
Tel.: 11 4702-4496  
Fax: 11 4702-6896  
Email: [hrabrazil@uol.com.br](mailto:hrabrazil@uol.com.br)

#### **Jorge Zahar Editor**

---

Contact: Mariana Zahar Ribeiro  
Title: Publisher

Address: Rua México 31 sobreloja 20031-144 Rio de Janeiro, RJ  
Tel.: 55 21 2108-0808  
Email: [mariana@zahar.com.br](mailto:mariana@zahar.com.br)

### **Livraria Cultura**

---

Contact: Mario Motta  
Title: Buyer  
Address: Av. Paulista, 2073 Conjunto Nacional 01311-940 São Paulo SP  
Tel.: 11 3170-4044  
Fax: 11 3285-4457  
Email: [mmotta@livrariacultura.com.br](mailto:mmotta@livrariacultura.com.br)  
Website: [www.livrariacultura.com.br](http://www.livrariacultura.com.br)

Contact: Edson da Silva Grimello  
Title: Buyer  
Address: Av. Paulista, 2073 Conjunto Nacional 01311-940 São Paulo SP  
Tel.: 11 3170-4033  
Fax: 11 3285-4457  
Email: [edson@livrariacultura.com.br](mailto:edson@livrariacultura.com.br)  
Website: [www.livrariacultura.com.br](http://www.livrariacultura.com.br)

### **Livraria da Vila**

---

Contact: Samuel Seibel  
Title: Owner  
Shopping Cidade Jardim  
Avenida Magalhães de Castro, 12000  
Tel: (11) 3755-5811  
Website: [www.livrariadavila.com.br](http://www.livrariadavila.com.br)

### **Macmillan**

---

Contact: Cristina Roberts  
Title: Managing Director  
Address: Rua José Felix de Oliveira, 383 Granja Viana 06708-645 Cotia SP  
Tel.: 11 4613-2277  
Fax: 11 4613-2217  
Email: [cristina.roberts@macmillan.com.br](mailto:cristina.roberts@macmillan.com.br)  
Website : [www.macmillan.com.br](http://www.macmillan.com.br)

### **Editora Melhoramentos**

---

Contact: Breno Lerner  
Title: Publishing Director  
Address: Rua Tito, 479 VL. Romana (Lapa) CEP: 05051-000 São Paulo SP  
Tel.: 55 11 3874 0854  
Fax: 55 11 3874 0855  
Email: [blerner@melhoramentos.com.br](mailto:blerner@melhoramentos.com.br)

Contact: Miriam Regina Loturco  
Title: Foreign Rights Manger  
Email: [mrioturc@melhoramentos.com.br](mailto:mrioturc@melhoramentos.com.br)

Contact: Leila Bortolazzi Belistri  
Title: Editor

Email: [lbortola@melhoramentos.com.br](mailto:lbortola@melhoramentos.com.br)

Contact: Ana Célia de Mendonça Goda Cunha

Title : Editor

Email : [acgoda@melhoramentos.com.br](mailto:acgoda@melhoramentos.com.br)

### **Segmento Farma Editores**

---

Contact: Daniela Barros

Title: Coordinator of Journalism Affairs

Address: Rua Anseriz, 27CEP: 04618-050 Campo Belo

Tel.: 55 11 3093 3241

Fax: 55 11 3093 3300

Email: [segmentofarma@segmentofarma.com.br](mailto:segmentofarma@segmentofarma.com.br)