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Report Highlights:

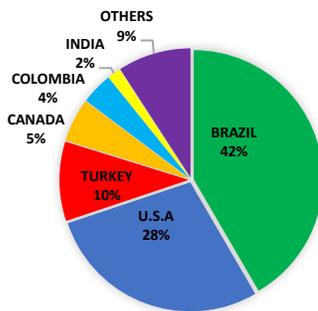
While Venezuela poses unique challenges as an export market, opportunities are growing for U.S. food and agricultural exporters to enter and expand in the market. Domestic production cannot meet consumer demand, leading to a continued dependence on imports. The emergence of a new type of retail outlet, “Bodegones,” that caters to middle and high-income consumers is creating a major market for imports of consumer-oriented products. The exemption of imported food products from tariffs since 2018, dollarization of the economy, and the liberalization of trade is creating a more enabling environment for exporters. In 2021, the United States exported USD 634.1 million in agricultural products to Venezuela, a 44.8 percent increase compared to 2020. This consolidated its position as Venezuela’s top supplier of food and agricultural products by volume with a 35.5 percent import market share, and second top supplier of these products by value with a 26.1 percent import market share.

Market Fact Sheet: Venezuela

Executive Summary: Venezuela is currently the fifth largest destination for U.S. agricultural exports in South America, followed by Ecuador and Argentina. In 2021, U.S. agricultural exports to Venezuela reached USD 634.1 million, an increase of 44.8 % compared to 2020. Trade in U.S. agricultural products to Venezuela has not yet recovered to pre-2015 levels due to a severe economic crisis and hyperinflation.

Imports of Consumer-Oriented Products: In 2021, Venezuelan imports of U.S. consumer-oriented products rose 53 percent to USD 96.4 million compared to USD 63.3 million in 2020.

AGRICULTURAL EXPORTS TO VENEZUELA, MARKET SHARE BY VALUE IN 2021



Food Processing Industry: Major suppliers of ingredients and raw materials include the United States, Brazil, Turkey, and Colombia. The food processing sector in Venezuela is composed of approximately 810 food and beverage manufacturers and processors. 50 percent of these companies are small-scale enterprises primarily focused on poultry, swine, and cheese. Shrimp and crab processing are rapidly growing. 45.9 percent of the food processing sector is made up of medium-scale enterprises and the remaining 4.1% is made up of large-scale companies.

Food Retail Industry: Until recently, the Venezuelan regime was the sole importer of food and agricultural products through the Food and Productive Services Corporation (CUSPAL), which is a business unit in the Ministry of Agriculture and Lands (MinPPAL). However, CUSPAL is no longer importing since the regime handed over import tasks to the private sector in 2020. Major supermarkets include varying types of chains that offer a comparable standard to U.S. supermarket retailers. Most major domestic supermarket chains belong to the Venezuelan National Supermarket Association (ANSA). Currently, there are about 5,884 supermarkets and 98,307 traditional “abastos” like corner stores. Corner stores dominate retail sales in the predominantly middle and low-income neighborhoods throughout Venezuelan cities and towns. A new food business model called “Bodegones” has emerged in Venezuela. Bodegones are like a grocery store in terms of size and offer only items from abroad, especially U.S. and European consumer-oriented products.

Quick Facts

2021 Population (millions): 27.9 (31.3 in 2017)
 2021 GDP (billions USD): 44.89
 2021 GDP Per capita (USD): 1,627.35
 2021 Imports of Consumer-Oriented Products (US million): \$96.4
 Major Crops and Value Chains: Corn, Rice, Sugar, Wheat, Poultry, Cattle, Dairy, Fish

Top Ten U.S. Consumer Oriented Products in Venezuela:

- Tree nuts
- Distilled spirits
- Processed vegetables
- Processed fruit
- Food preparations
- Confectionery
- Fresh fruit
- Fruit & vegetable juices
- Dog & cat food
- Chocolate & cocoa products
- Dairy products
- Bakery goods, cereals, & pasta

Origin of Venezuelan Agricultural Imports by Volume (Thousand MT) * Jan.-Dec. 2020 vs. Jan.- Dec. 2021*

Country	Jan - Dec 2020	Jan - Dec 2021	Annual Change %	% Mkt Share by Value in 2021
USA	1,323.7	1,416.2	7.0	35.5
Brazil	1,185.5	1,182.3	-0.3	29.6
Turkey	394.7	356.7	-9.6	8.9
Canada	153.1	292.6	91.2	7.3
Mexico	713.0	275.8	-61.3	6.9
Other Countries	462.2	466.1	0.8	11.7
Total	4,232.1	3,989.8	-5.7	-

Source: Trade Data Monitor. * Only products traded in M.T.

Top 5 Traditional Retailers	Top Non-Traditional Retailers
Dia a Dia Practimercados	Forum Supermarket
Central Madeirense	Rio Supermarket
Excelsior Gamma	Rio Vida
Lider Hipermercado	Que Papaya Hypermarket
Plazas Supermercado	

Data and Information Sources: Global Agricultural Trade System, TDM, ANSA, Venezuelan Food Chamber (CAVIDEA)

SECTION I: MARKET OVERVIEW

U.S. agricultural exports to Venezuela averaged USD 1.4 billion annually from 2010 to 2014. In 2013, Venezuela was the second largest destination for U.S. agricultural product exports to Latin America with trade values reaching USD 1.5 billion. The precipitous slide in U.S. agricultural product exports began in 2015 as low oil prices decreased government revenues, diminishing foreign exchange to import goods. This was the fourth straight year that U.S. agricultural exports fell below USD 1 billion. In 2018, the value of U.S. agricultural product exports to Venezuela fell around 6.4 percent from USD 399.3 million in 2017, which was the lowest value of trade in over a decade.

However, in 2021, Venezuelan agricultural imports totaled USD 2.4 billion, up 31.2 percent compared to 2020. U.S. agricultural exports to Venezuela were valued at USD 634.1 million in 2021, a positive change of 44.8 percent compared to USD 438 million in 2020. The United States was the second largest exporter of agricultural goods to Venezuela in 2021, behind Brazil who exported \$684.6 million to Venezuela in 2021. Increases in imports of bulk (46.8 percent) and intermediate products (39.7 percent), as well as consumer-oriented products (52 percent) drove U.S. growth. The United States remains the largest supplier of agricultural and food products by volume to Venezuela, with 35.8 percent market share. Venezuela is currently the fifth largest destination for U.S. agricultural exports in South America, followed by Ecuador and Argentina.

Nevertheless, the volume of Venezuelan imports fell by 5.7 percent in 2021 due to international price increases and the COVID-19 pandemic. Currently, stocks for most commodities continue to grow. Because of a better economic environment and new investments, inflation is no longer a major constraint, but low and stagnant purchasing power will remain the main factor affecting food security in Venezuela.

Opportunities are growing and U.S. companies can benefit from strong consumer preference for U.S. products, preference for U.S. technologies, and a de facto dollarization. Currently, more than 70 percent of food availability is of imported origin. Additionally, the United States enjoys geographic proximity to Venezuela, and much shorter shipping times (three to five days) compared to other suppliers.

Imports of Consumer Oriented Products

In 2021, Venezuela's total imports of consumer-oriented products from the United States rose 52 percent to USD 96.4 million, compared to USD 63.3 million in 2020. In 2021, Venezuela's total imports of consumer-oriented products from the United States rose 52 percent to USD 96.4 million, compared to USD 63.3 million in 2020. Top consumer-oriented exports to Venezuela from the United States include food preparations, bakery goods, cereals, pasta, and distilled spirits.

This increase in exports to Venezuela is linked to the emergence of "bodegones" in the past few years, a private-sector type of retailer that offers imported consumer-oriented products. These food stores, like mini-markets in size, but with a wider variety of imported products, are expanding rapidly in number. They offer mostly imported consumer-oriented products and other products that consumers often cannot find in traditional supermarkets. These imported products are usually priced higher than the same product in foreign countries. The number of "bodegones" in Venezuela is unknown as they are not affiliated to any food chamber or association. Some "bodegones" are virtual and only exist through

online platforms. These stores offer their products mainly in U.S. dollars but accept payment in Euros and local currency at the daily U.S. dollar exchange rate.

Public Sector

Until recently, the Venezuelan regime was the sole importer of food and agricultural products through the Food and Productive Services Corporation (CUSPAL), which is a business unit dependent on the Ministry of Agriculture and Lands (MinPPAL). This unit previously managed all public food production and distribution networks. But CUSPAL is no longer importing since the regime handed over import tasks to the private sector in 2020. There are currently no public supermarket chains. The regime-owned supermarket chain, “Abastos Bicentenario,” became “Tiendas CLAP¹,” a private supermarket, but very few CLAP stores remain in the country.

The Venezuelan regime tries to satisfy food supply through a combination of food tickets and direct subsidies (CLAP Bags). However, these programs are unable to meet the country’s demand. Local food production is not keeping up with domestic demand, which forces Venezuela to remain dependent on a continuous import of foods and other essential goods. Even the products included in the subsidized food ration boxes are imported. Products included in these boxes are usually processed foods and are imported from different countries except the United States. Most of these products come from countries such as:

- Mexico (mainly milk)
- Turkey (mainly pasta, rice and wheat flour)
- Canada (mainly wheat)
- Brazil (mainly sugar)
- India (mainly miscellaneous grains, oils seeds)
- Colombia (mainly lentils, corn flour)
- Argentina (mainly baking inputs)

Table 1. Main Exporters to Venezuela in 2021 and Top Products

Exporting Country	Total Ag Exports to Venezuela in 2021 (millions USD)	Top Products Exported to Venezuela in 2021
Brazil	\$934.4	Sugar, soybean oil, baking inputs
United States	\$634.1	Soybeans, corn, wheat
Turkey	\$223.1	Pasta, processed cereals, wheat flour
Canada	\$122.5	Mustard seeds, dog/cat food, wheat
Mexico	\$122.3	Milk/cream products, baking inputs, fish prepared/processed
European Union (27)	\$91.1	Processed food, ingredients, beverage bases, distilled spirits

¹ Tiendas CLAP is not the same as the CLAP Program

Colombia	\$88.9	Vegetable oil, soybean oil, baking inputs
India	\$36.5	Seeds (esp. oilseeds), oleaginous fruits, grains
Argentina	\$36.3	Wine, wheat flour, baking inputs

Source: Trade Data Monitor

Table 2. Advantages and Challenges for U.S. Exporters

Advantages	Challenges
<ul style="list-style-type: none"> • The private sector can now freely import food products from their preferred origin and seller. • The regime is no longer the dominant force in agricultural and food imports. • Venezuelan consumers consider U.S. products to be high quality. • There are growing opportunities to export products to higher income consumers through Bodegones. • Local retailers see U.S. suppliers as a reliable source in terms of volume, standards, and quality. • Media in Venezuela is highly influenced by U.S. culture and consumers are aware of U.S. brands and products. • Venezuelans are open to ready-to-cook and ready-to-eat imported food products. • U.S. franchises remain popular. Despite the economic crisis, some traditional U.S. franchises are surviving in Venezuela. • The Venezuelan economy is increasingly dollarized and the U.S. dollar is freely circulating in the country. 	<ul style="list-style-type: none"> • Oil sanctions imposed on the Venezuelan regime limit access to hard currency and international credit for importers. • Imported products are expensive for most consumers, who are very price sensitive. • Some countries, especially middle eastern countries, have trade agreements with Venezuela giving them preferential duties for some products, or allowing them to receive payments via oil exchange. • It may be difficult to obtain import permits and food registration numbers for some products. • Hyperinflation and devaluation have hurt the ability of consumers to pay for goods, with only 15 percent of the population able to afford U.S. dollars. • Failures in the supply of energy and public services can hinder effective export procedures and electronic transactions. • Consumption in Venezuela is falling.

SECTION II: EXPORTER BUSINESS TIPS

Supermarket chains are the main means for reaching middle to high-income consumers in Venezuela when products are readily available. U.S. exporters can approach gas marts, grocery stores, and convenience stores through major local suppliers (wholesalers/distributors). Depending on product brand and volumes, major food importers/wholesalers supply some supermarket chains, and especially provincial retailers. Distributors tend to supply smaller niche markets rather than big supermarket chains. Some big supermarket chains also have a sales department to supply some small markets or corner stores. Local importers will take advice from recognized international auditors in terms of obtaining quality certificates for the product offered by the exporter.

Tips to Consider When Exporting to Venezuela

- Exporters can contact importers, wholesalers/distributors, or supermarkets through the Venezuelan Supermarkets Association (ANSA), the Venezuelan Food Industry Chamber (CAVIDEA) or the Venezuelan American Chamber of Commerce (VENAMCHAM). When selecting a partner (an agent or a representative), consider conducting a background check of the prospective partner through local food and/or commerce chambers before signing permanent contractual arrangements.
- Supermarket chains are strong negotiators and may request exclusivity, especially if they can maintain high volumes of the product offered. If the product price set by the exporter is out of local market standards, importers may instead decide to approach local distributors who could offer a better price or the same price with lower logistical burdens. Remember that competition is based on quality, price, and service.
- It is important to build relationships with large importers and wholesalers/distributors. Personal visits/meetings are highly recommended and local food importers are willing to eventually travel to meet exporters. However, considering the situation in Venezuela and the unavailability of direct flights from Venezuela to the United States, sometimes these meetings must be done virtually.
- Consider investing in developing your own market intelligence to identify relevant needs of buyers and consumers. Local companies (including Venezuelan polling firms) and food associations can provide relevant information/data to identify niche markets, consumer trends, market development opportunities, and recommended business practices.
- Consider consolidation when exporting small amounts of product.
- Attend trade events like the National Restaurant Association Show or the Americas Food and Beverage Show, which provide opportunities to meet and educate Venezuelan importers. Local trade shows in Venezuela are currently not taking place.
- Many retailers are willing to display point-of-purchase marketing materials for U.S. brands and products, as long as marketing/communication materials are in Spanish.
- It is important to work closely with local importers to comply with food import regulations to facilitate the registration and import of food products and minimize port of entry risks.

SECTION III: IMPORT FOOD STANDARDS & REGULATIONS / IMPORT PROCEDURES

The Venezuelan regime implemented the United Nations Custom Computerized System (SIDUNEA)² in most Venezuelan ports of entry. With this system, clearing customs takes approximately five to eight working days. However, importers have reported delays in this process. By law, only nationals and private customs agencies with Venezuelan local staff are entitled to clear shipments through customs. A custom agent assesses customs, port charges, and taxes as well as fills out paperwork. Generally, the custom agent's fee is one percent of the CIF value, plus any other charges accrued during offloading.

All imported goods presented at the ports of entry must be officially declared to the National Integrated Tax Administration Service (SENIAT) authorities within five days of arrival. Fines may be levied and applied to any shipment when the customs entry is made later than five days after the date of arrival.

² The SIDUNEA Automated Customs System is the computer tool applied by the Customs and Tax Administration, for registration, exchange, and processing of information, as instrument for the processing and control of the arrival, storage, introduction, permanence, and extraction of goods.

When an importer either delays or refuses to claim a product arriving in Venezuelan ports, SENIAT will impound the goods not claimed, and if steep fines and storage fees are not promptly paid, it will sell the goods at auctions. All shipments must be made on a direct consignment basis. Customs regulations stipulate that the consignee is the owner of the shipment and is responsible for all customs payments. Importers must register all their products with the Ministry of Health Food Comptroller Division prior to placing the product on the Venezuelan market.

The following are customs documents required to export primary goods to Venezuela:

- Certificate of origin. This document accredits the place of origin of the goods, which determines the tariff or commercial treatment given to them at the time of their entry into a certain customs territory.
- Certificate of non-local production (CNP)
- Phytosanitary and zoosanitary certificates as relevant
- Licenses pertinent to the competent public agency

Further information on import procedures, duties, and custom fees are available in the Venezuelan Food and Agricultural Importer Regulations (FAIRS) Report, available at:

[FAIRS Annual Country Report Annual_Caracas_Venezuela_12-31-2021](#)

Note, the U.S. Department of the Treasury's Office of Foreign Assets Control (OFAC) administers economic sanctions related to Venezuela. These sanctions exempt transactions related to the export of agricultural and food products, and do not prevent the issuance of export certificates by the USDA.³

SECTION IV. MARKET SECTOR STRUCTURE AND TRENDS

Venezuela is immersed in a deep economic, political, and social crisis, which has a significant impact on consumers. The loss of purchasing power of the average Venezuelan – a product of hyperinflation – has led them to reinvent themselves, looking for alternatives to obtain additional income and modifying their purchasing and consumption habits to overcome the crisis.

Even before the coronavirus pandemic, Venezuela's deep economic crisis was taking a crippling toll on the country's children, with an entire generation at risk of growing up hungry and malnourished. Although food per capita consumption is low in Venezuela, it went from 13 kilograms of food per capita in 2018 to 25 kilograms in September 2021, allowing the food and beverage market room to grow.

Retail Sector Trends

According to information gathered from the “Venezuela Retail Radiography 2021” event, held by the National Supermarkets Association (ANSA), by 2019 there were about 5,884 supermarkets and 98,307 corner-stores (abastos). ANSA's estimates (which are currently being updated) reflect a growth in the supermarket chain format of 14 percent and a growth of 9 percent in hypermarkets. Additionally, the sector has increased with the opening of five new stores in 2020 and 44 in 2021, totaling a 7.4 percent expansion.

³ In addition, OFAC administers general licenses that authorize certain transactions involving certain blocked persons related to the exportation or re-exportation of agricultural commodities, to include food products. (Link to general licenses / OFAC guidance regarding Venezuela: <https://home.treasury.gov/policy-issues/financial-sanctions/sanctions-programs-and-country-information/venezuela-related-sanctions>)

Traditional corner-stores dominate retail sales in the predominantly middle and low-income neighborhoods, but the Bodegon retailer type has also emerged and expanded in Venezuela. Bodegones offer only items from abroad, especially consumer-oriented products imported from the United States and Europe. The market dynamics have changed. Nowadays, Bodegones are more visited than traditional supermarkets and consumers there spend approximately USD 10 more per month than what they spend in traditional supermarkets. Prices of products in Bodegones are very competitive compared to supermarkets, and this is due to the tax exemption applied to food imports in the country.⁴ These products are offered in U.S. dollars but can be paid in VES at the exchange rate of the day.

According to ANSA, the days when most purchases are made in traditional supermarkets are Fridays and Saturdays, but for Bodegones, most purchases are made on Wednesdays, Thursdays, and Fridays. Delivery services and online commerce have also become a good option for consumers to buy mainly food and sanitary staples. Retailers have adapted to new consumer habits by widening their private label portfolio, incorporating regular special offers, improving logistics to provide delivery service, adopting digital tools to better connect to clients, and even expanding their working hours.

COVID-19 challenged food manufacturers who have reacted to new consumer trends. These trends include a greater consumer interest in healthier lifestyles and growing preference for lower priced food products, including private label and smaller packaging, like individual condiment and sauce packets. To manufacturers, new trends include implementing channels to communicate directly with final consumers and developing new products.

According to a study carried out by ANSA, the table below reflects part of the products in which a consumer spends the first USD 50 when entering a traditional supermarket (only food products are mentioned) on a monthly basis, as well as the approximate quantity of that product that the consumer purchases during that month.

Table 3. Consumer priorities and best-selling imported product categories in traditional supermarkets in Venezuela

Product	Approx. Monthly Expense per Consumer (USD)	Approx. Volume per month
Corn Flour	\$6	7 kg
Powdered Milk	\$4.40	700 gr
Rice	\$4	4 kg
Edible Oil	\$3.70	1.7 kg
Sugar	\$3	3 kg
Pasta	\$3	2.8 kg
Mayonnaise	\$3	600 gr

⁴ In year 2018, the Venezuelan regime eliminated import tariffs for food products, agricultural products, and raw materials. The decree with the specifications and the products involved was published in the official gazette number 6393, which can be found [here](#). However, on August 6, 2021, the regime announced that tariffs exonerations would soon be eliminated for 597 harmonized codes (HC) related to finished products, as a strategic replacement for unfair competition, which may be affecting local production according to them. But the regime extended the exemption measure until August 31, 2021, for 4,458 products, and has been maintained up to now.

Sodas	\$3	4.7 liters
Coffee	\$2.70	500 gr
Margarine	\$2.60	1 kg
Wheat Flour	\$2.40	2.5 kg
Biscuits	\$2	400 gr
Snacks	\$2	200 gr
Tomato Sauce	\$1.60	600 gr

Source: ANSA “Retail Radiography event” 2021

Other Consumer and Retail Trends

- Canned products are a “must” in the country, especially green peas, corn, and mushrooms, due to their long-lasting quality.
- Frozen foods such as frozen fries are very sought after. Local potatoes are not ideal for fries and potato seeds are very scarce in Venezuela.
- Zelle and Pipol Pay platforms increased as means of payment during 2021.
- Proximity stores (i.e. local stores in neighborhoods) are growing in popularity as consumers can walk to save on gasoline costs.
- Stores have been focusing on improving supply, quality, and convenience to strengthen consumer loyalty. This has included investing in store illumination and customer service quality.
- Retailers are developing their own in-house brands. For example, Excelsior Gama Supermarkets has produced its own ice cream brand.
- Packaging styles have changed in terms of size and manufacturing materials (i.e. some canned food can now be found in solid plastic containers or cardboard packaging, or liquid food such as liquid milk can now be found in bags).
- Supermarkets are developing store sections dedicated to entrepreneurs to favor local production (in Venezuela, most new businesses are currently related to food).
- 23 percent of household inhabitants work from home and seek information through social networks.
- Stores are employing product efficiency strategies including showcasing products in-store that generate proven turnover and profitability.
- For some more affluent Venezuelan consumers, trends are more important than price. They are highly influenced by food trends in other countries.

SECTION V. AGRICULTURAL AND FOOD IMPORTS

Currently, the top bulk commodities exported to Venezuela from the United States include corn, wheat, rice, soybeans, and cotton. Despite global reduced wheat availability, the United States grew its exports of wheat to Venezuela in 2021. For intermediate products, the United States is the top exporter of soybean meal and oil to Venezuela and according to the National Poultry Federation of Venezuela (FENAVI), imports are expected to grow in the coming year as Venezuela’s feed industry increases its production. Table 4 below outlines the top consumer-oriented products being exported to Venezuela.

Table 4. Top U.S. Exports of Consumer-Oriented Products to Venezuela in 2020 and 2021

Product Category	US Exports 2020 (USD thousands)	US Exports 2021 (USD thousands)	2020 – 2021 % Change
Consumer Oriented Total	63,385	96,457	52
Food Preparations	30,283	53,666	77
Bakery Goods, Cereals, & Pasta	4,303	4,644	8
Distilled Spirits	1,790	4,176	133
Dairy Products	3,139	3,64	16
Processed Vegetables	1,236	2,668	116
Chocolate & Cocoa Products	2,038	2,576	26
Fresh Fruits	1,514	2,573	70
Dog & Cat Food	1,402	2,001	43
Poultry Meat & Prods. (ex. eggs)	1,386	880	-37
Tree Nuts	203	703	247
Confectionery	328	577	76

Source: BICO

Table 5. Product Categories Identified as Major Opportunities for U.S. Exports to Venezuela

Bulk Commodities	Intermediate Products	Consumer-Oriented
Corn	Soybean meal	Food Preparations
Wheat	Dextrins, Peptones, & Proteins	Bakery Goods, Cereals, & Pasta
Rice	Essential Oils	Distilled Spirits
Soybeans	Other Feeds, Meals & Fodders	Dairy Products
Cotton	Vegetable Oils (ex. soybean)	Processed Vegetables
Pulses	Planting Seeds	Chocolate & Cocoa Products
	Sugar, Sweeteners, Beverage Bases	Fresh Fruits
		Dog & Cat Food
		Poultry Meat & Prods. (ex. eggs)
		Tree Nuts

Top consumer-oriented products exported to Venezuela from the world

- Rice
- Pasta
- Food preparations for infants
- Alcoholic and Nonalcoholic Beverages
- Milk and cream in powder, concentrated, not sweetened, and sweetened
- Soybean meal
- Pulses or beans
- Corn Flour
- Sauces
- Breakfast Cereals
- Processed Vegetables
- Refined Sugar
- Canned Tuna

SECTION VI. KEY CONTACTS AND FURTHER INFORMATION

Venezuelan Affaires Unit (VAU)

Office of Agricultural Affairs (OAA)

U.S. Embassy, Bogotá, Colombia

Telephone: (57-1) 275-4622

e-mail: AgBogota@usda.gov

USDA / Foreign Agricultural Services (FAS)

<http://www.fas.usda.gov/>

Venezuelan Supermarkets Association (ANSA)

<http://www.ansa.org.ve/>

Venezuelan Food Industry Chamber (CAVIDEA)

<https://www.cavidea.org/>

Venezuelan American Chamber of Commerce (VENAMCHAM)

<https://www.venamcham.org/>

Venezuelan Agricultural Producers Association (FEDEAGRO)

<https://fedegro.org/>

DATANALISIS

<https://datanalisis.com/>

Attachments:

No Attachments.