

Main news

As of this month (June 2019), Datamar is making the DataLiner system available with a fresh month of data (May 2019 data) much earlier than previously done. Until now, customers had to wait 30 days to know the results of the previous month, although as of this month the time lag is down to under 20 days.

In the above dashboard, it is possible to verify that almost all the data has already been inserted into the DataLiner system, missing only some data from Hamburg Sud, which is updating the way it sends manifests to Datamar. Once done, the full data set should be available mid-month if not sooner.

Hence, although a fraction of May data is missing, the current amount of data already gives clients an excellent overview of the market, enabling them to make faster and more assertive decisions. The final data for May will be fully available and re-released on the first business day of July.

"We are committed to continuous improvement to meet the evolving needs of our customers. This has led Datamar to invest not only in the quality and reliability of the data but also in the timeframe for which this information is made available. The agility of the information allows strategies to be defined faster, collaborating with the productivity of the company as a whole," says Andrew Lorimer, director of Datamar.



Another recent improvement in Datamar's data delivery is the wide range of dashboards available to clients, allowing for easier visualization of the results of data, facilitating faster decision making.

DataLiner provides containerized maritime trade data for the entire East Coast of South America – made up of Brazil, Argentina, Uruguay, and Paraguay. Bulk and break-bulk data are also available for Brazil. The information is almost entirely based on vessel manifests received directly from shipping companies, supplemented with alternative sources whenever necessary. This allows for the provision of detailed information relating to the vessel, port, shipowner, exporter, and importer, as well as volumes shipped.

Ports, terminals and infrastructure

The Port of Suape (PE) has partnered with the Panama Canal Authority to increase its level of development and attract greater business opportunities.

The agreement, signed in Panama City, is valid for two years. In it, the parties have agreed to undertake joint initiatives such as

market efforts to spread the benefits resulting from the expansion of the canal and the interconnection that offers Suape as a strategic location along the sea route.

According to the development secretary of Pernambuco, Bruno Schwambach, signing the agreement reinforces the government's commitment to finding international partners. "We are seeking international partners that have operations with large ports and large shipowners. The Panama Canal is one of them, where we intend to make a very good synergy, considering the connection that it makes between the Pacific and the east coast of South America. So, we are getting behind these partnerships to show our full potential," commented the secretary.

For the president of the port complex, Leonardo Cerquinho, the agreement will be very positive for the port of Suape "because it will make new international sea routes viable, facilitating our second container terminal. This will be reflected in an increase in cargo handling and an increase in port business."

Port workers at Santos rejected a salary increment proposal by Codesp (São Paulo State Docks Company) and scheduled an indefinite strike starting next Wednesday (26/06). According to Every Cirino, president of Sindaport (Port Administration Employees Union), the proposal was declined because it is believed that it will be loss making for the workers.

Cirino explained that last month the dock workers were going to start striking but as Codesp decided to extend the current collective agreement for 30 days, the move was suspended. "However, almost a month passed and we have not made any progress with Codesp. Despite talks with President Tércio, the proposal presented by the company reduces salary increments that have been paid for years."

Cirino points out that the main demand being made is that Codesp fully maintains all clauses of the current Collective Labor Agreement and grant salary readjustments in line with the total inflation index during the relevant period.

Faced with this situation, Codesp employees will follow the schedule for the strike:

- 21/06 (Friday) or 22/06 (Saturday) – Notification of strike
- 25/06 (Tuesday) – Preparatory meeting for the strike
- 26/06 (Wednesday) – Strike – 10 hour demonstration at the door of Codesp presidential building

After 20 years, the Port of Ilhéus in Bahia will resume eucalyptus exports. The wood comes from Minas Gerais and will be shipped to destinations such as Portugal and China. In total, 50,000 tons of the wood are to be exported, which arrived at the port in May for prior storage.

This was only possible because the Bahia State Docks Company (Codeba) implemented a scheme to exempt general cargo from storage charges for 60 days at port facilities. In addition to eucalyptus, 30,000 tons of manganese extracted in the State of Bahia will also be shipped via Ilhéus. The operation was resumed, according to Codeba, after a decade.

On June 17 berth 4 was inaugurated at the Port of Itajaí (SC). This allowed it to be operating at full capacity again after being affected by a flood in 2008.

After more than a decade, the reinforcement and realignment works have been completed and will allow the port to receive up to four vessels simultaneously. The federal investment involved in the work reached R\$161m. Itajaí is first placed in reefer container movement second in movement of other containers, accounting for 5% of Brazil's trade balance of Brazil and more than 70% of the trade balance in Santa Catarina. Berths 3 and 4 were the last to be restored as works were halted by the company in charge in 2016 and resumed only in July 2017. Once works to the new evolution basin are completed later this year, the port will be able to receive vessels of up to 336m in length.

Starting in July, **the 6,000 outsourced port workers registered with the Worker Management Organ (Ogmo) at the Port of Santos**, will be able to apply for shift work via cell phone, tablet or computer. The system, dubbed Digital Shift Work, was presented to trade unionists on Tuesday (06/18). Last Wednesday (19/06), professionals can already look up information about shift work online.

The executive director of Ogmo, Evandro Schmidt Pause, guarantees that they will continue to attend to workers who prefer to be physically present as well as those who consult jobs online. "We will expand the alternatives. The conditions to compete for vacancies will be the same as face-to-face because the system will be synchronized and guarantee equal opportunities," he said.

The director explains that the measure has been debated for years. According to him, in all talks with union leaders and workers, the return was positive. Examples of success in adopting this system at other ports were also taken into account. "In Paranaguá [PR] for example, in two years the system has had an adhesion rate of 85%," he said.

Training and deployment

Schmidt says training will be held in the last week of June, between Monday and Friday. "We will even do simulations of the shifts for the workers to adapt." The Digital Shift Work system will begin on July 1st. Each week, the program will be deployed in a union. Since there are eight entities, the process is expected to be completed in two months. "The system preserves the existing methodology," explained Evandro Schmidt Pause.

Expansion works at the Port of Salvador, under the supervision of Salvador Container Terminal (Tecon) was suspended last Tuesday (June 18) by the Municipal Secretary for Development and Urbanisation (Sedur). According to the entity, the embargo will be maintained until all documents are presented that prove the exact area being leased as agreed with the Transport, Ports and Civil Aviation Ministry.

This is the second time that the works – estimated at R\$715m – are suspended. In March, Sedur paused the work because the agency did not have an urban permit to start the expansion works.

The Port of Pecém shifted a record 1.54m tons in May, equivalent to 4% year-on-year growth. The increase was mainly due to exports, which grew 29% over the same period comparison, to 480,019 tons. According to the Pecém Industrial and Port Complex Development Company, May was the best result for Pecém in the last five years. The total volume handled by the port during the first five months stood at 7m tons.

Solid bulk cargo accounted for 53% of the port's total movement, equivalent to 3.7m tons. Containerized cargo registered 78,275 units (122,293 Teus), a 28% increase year-on-year. The most prominent contributors to growth were coal, iron ore, steel, fertilizers, rice, salt, wheat flour, and fruits.

Logistics

VLI, a logistics company that integrates railroad, intermodal terminals, and ports as well as managing the concessionaire FCA (Ferrovia Centro-Atlântica), has completed the first sugar shipment for Tereos, the third largest producer in the world.

The cargo, marketed by Tereos Commodities Sugar, a trading arm of the Tereos Group that sells white and raw sugar in more than 60 countries, went through berth 3 of Tiplam at Santos on June 18, bound for China. All the products arrived at the port via the railroad and the multimodal structures of VLI.

From 2015 to 2018, VLI has already transported almost 15m tons of sugar along the same route. The volume is driven by the operation of the company's terminals in Uberaba and Guarará.

Strategic partnership

In 2018, Tereos and VLI signed a contract for joint investment in the construction of two warehouses in São Paulo state and a long-term contract for the transportation of 1m tons of raw sugar per year. The storage units will be installed within the VLI integrated system, which starts in the outskirts of São Paulo and ends at the Port of Santos. The agreement establishes a total investment from both entities combined of more than R\$200m.

Last year, growing agribusiness demand made FCA acquire 26 new locomotives, 15 of the SD70 BB model from EMD. With three of them, it is possible to draw up to 90 loaded wagons. The 11 other locomotives are from the ES43 BBi model and were produced by the GE unit in Contagem (MG).

Rumo Logística continues to increase the volume of B100 biodiesel transported via rail. It moved 78,000 cubic meters between January and May this year, a 31% year-on-year increase. Rumo's best month was April, when the volume was 50% higher than year-ago levels.

According to the National Agency for Petroleum, Natural Gas and Biofuels (ANP), Rio Grande do Sul is Brazil's largest producer state, having produced 1.4m cubic meters in 2018, 30% more than in 2017. Between January and April of this year the state already reached production levels of 482,614 cubic meters, 18% more than the same period last year.

The fuel used by the country's largest distributors is shipped via Rumo trains at terminals in the cities of Passo Fundo, Ijuí and Canoas. The cargo is transported to Araucária (PR), where it is offloaded and sent by road to markets in Paraná and São Paulo.

Concessions plan

During the inauguration ceremony for berth 4, the Infrastructure Minister announced that Itajaí would be included in the Federal Government's priority concessions plan, which will facilitate new investments. The intention is to jointly discuss the terms of a new international tender, in which the responsibilities of the winning company will define the duration of the concession.

Shipping

Maersk is testing a new fuel that provides its customers with carbon-neutral transportation. This is because the company is committed to providing increasingly sustainable solutions.



Maersk will soon offer customers carbon-neutral transport. A new biofuel-blend product - first of its kind in the industry - is being released with select Maersk customers like @hm Group and validated in a trial with the @DSGCoalition and @Shell this year. [maersk.com/news/articles/...](https://maersk.com/news/articles/)

♥ 119 05:40 - 20 Jun 2019

Some customers were selected for the test. The first company to use it will be the H&M Group, a Swedish clothing giant that aims to be environmentally friendly by 2040. The pilot project will use a biofuel that is the same blend of cooking oil tested and validated this year by the Dutch Coalition for Sustainable Growth (DSGC) and Shell.

Pilot test

In March, a group of Dutch multinationals (FrieslandCampina, Heineken, Philips, DSM, Shell, and Unilever) members of the DSGC joined forces with Maersk to undertake a biofuel-driven journey from Europe to China.

The pilot test, using up to 20% second-generation sustainable biofuels on the Mette Maersk mega-ship, traversed the 25,000 nautical miles round trip between Rotterdam and Shanghai with only biofuel blends. This operation saved 1.5m kg of CO₂ and 20,000 kg of sulfur.

"The biofuel test on board Mette Maersk has proven that decarbonized solutions for transport can now be used both technically and operationally. Although not yet an absolutely definitive solution, it is certainly part of the solution and can serve as a transition to reduce CO₂ emissions. With the launch of this product, Maersk seeks to assist our customers in migrating to sustainable supply chains," said Maersk's COO Søren Toft.

Considering the whole cycle of fuel production and transport, the use of Maersk's biofuel makes it possible to reduce emissions by 85% compared to conventional fuel. Maersk promised at the end of last year to decarbonize its activities by 2050.

Maritime transport remains the most carbon-efficient global means of transport but represents 2-3% of global emissions. This number will continue to grow unless it is controlled by industry leaders and public policy.

Trade

The ambassador of Bangladesh in Brazil, Zulfiqar Rahman, visited the Port of Paranaguá last Tuesday (05/18) to get to know its structure and discuss the possibility of new business between the Asian country and exporters from Paraná.

According to him, the goal is for Bangladesh to import up to US\$1bn in Brazilian products per year.

"The visit to the pier caught my attention, especially in terms of efficiency, about which I had already been informed," said the

ambassador. According to him, the focus of Bangladeshi imports will be soybeans, bran, sugar and cotton, among other products.

The country's honorary consul in Curitiba, Marcelo Grendel Guimarães, explains that the intention is to increase the purchase of food. "We have 160m people in Bangladesh. One of the objectives of this visit is to begin importing chicken to feed this entire population."

Rahman was welcomed by the business director of the company Portos do Paraná, André Pioli, who pointed out that in 2018 the port moved handled 53m tons. Also attending the visit were the ambassador of Bangladesh, Shameem Akhter, and the political advisor and head of chancellery, Samia Israt Ronee.

According to Argentina's statistics agency, its economy shrank 5.8% in the first quarter of 2019 as a reflection of the recession that brought down domestic consumption and production in the country. Despite the sharp drop there was a slight improvement over the previous quarter, which was the weakest quarterly performance in a decade. Argentina shrank 6.2% in the last quarter of 2018, shaken by a falling currency and unrestrained inflation.

A more detailed analysis of the country's economic performance shows that agriculture and livestock actually grew 7.7% while fishing rose 5.5%. However, private consumption fell by 10.5% and public consumption by 0.2%. Exports rose by 1.7%, and imports fell by 24.6%.

Ecolatina consultants said that after the first quarter decline, there are signs that the recession has finally hit the bottom and that the economy could begin to recover, mainly because of good harvests and the competitiveness of the foreign currency. This is evident in the export sector which, although moderate, has been rising gradually in the last two quarters.

Unemployment rises to 10.1% in the first quarter

Another problem that haunts the country is unemployment. Argentina's unemployment rate rose to 10.1% in the first quarter from 9.1% in the first three months of last year, according to state statistics agency INDEC. This is the highest level since the current president Mauricio Macri took office and the worst in thirteen years.

That means that there are 1.9m Argentinians without jobs, 220,000 more than a year ago. Including rural workers, the final number could be closer to 2m. Likewise, underemployment reached 11.8%, a 2% increase over the same period last year, when the figure was at 9.8%.

The Argentinian Naval Authority (PNA) has published a new edition of the Waterway and Maritime Activity Index, which measures the volume of cargo transported by these routes. The index tries to explain port activity, and thus to provide statistics on the performance of the Argentine port system as a whole. **The highlight was a significant 11.6% rise in shipping activity in May compared to April, with 11.1m tons transported**, which also represents a 28% year-on-year increase.

According to the index, exports increased 10.5% in May compared to April 2019, to over 10.2m tons, a 48.2% rise compared to the same period last year. Imports in the month rose 23.7% in relation to April, to 972,442 tons. Although this represents a

46.7% drop year-on-year, the accumulated highs during the first four months of 2019 allowed the total to reach more than 3.8m tons.

Meat

Beef exports grew 9.3% in May compared to April, reaching 149,960 tons, according to data from the Secretariat of Foreign Trade (Secex), released by the Brazilian Beef Exporters Association (ABIEC). Exports totaled US\$575.98m, up 11.4% over April. One of the main reasons for this growth is that shipments to Russia resumed again in October of last year.

In 2018 Russia was only placed 26th in terms of its quantity of Brazilian meat imports. In May it had jumped to 8th position amongst the main destinations, with a volume of 7,362 tons and revenue of US\$24.2m. Between January and May shipments to Russia grew 137% by volume and 140% in sales. Shipments during the period totaled 24,978 tons, with revenues of US\$81.34m. Brazil's total beef exports stood at 692,829 tons in the first five months of the year, up 16.7% compared to the same period in 2018. Sales totaled US\$2.6bn, up 7.7%.

The Brazilian Beef Exporters Association did not compare May 2019 data with May 2018 because last year there was a change in the methodology used by the Secretariat of Foreign Trade (Secex), which caused a delay in the disclosure of the monthly data.

More than 38% of all frozen chicken exported by Brazil in the first five months of 2019, left the country via the Port of Paranaguá (PR). During this period, total chicken sales stood at 1.6m tons, of which 637,600 tons were shifted via Paraná. Paraná remains the main exporter of the commodity, followed by Santa Catarina which shipped 626,900 tons during the same period.

Data from the Brazilian Animal Protein Association (ABPA) showed that Brazil's chicken exports were 3.6% higher year-on-year by volume and 6.3% more by revenue. In Paraná, these growth figures were 10.6% and 13.6% respectively. Chicken exports via Paranaguá originate mainly in Paraná, Mato Grosso do Sul and Santa Catarina. The main destinations are China, Japan, the United Arab Emirates, and Saudi Arabia.

In Paranaguá, the number of reefer containers for transporting chicken grew 328% year-on-year between January and May 2019, to 19,484 units. In the same period last year, there were only 4,553 units.

Record growth

In May, TCP recorded record turnover of reefer containers at 8,442 units, breaking the previous monthly record of 8,236 units registered in June 2017. The cumulative total for the year so far stands at 35,369 units. It is worth remembering that TCP has the largest reefer outlet park in the country.

Grain

According to the Argentina's Agricultural Secretariat, the country's producers are expected to plant 6.5m hectares of wheat in the 2019/20 season. The previous forecast was 6.46m hectares but this has gone up mainly due to the good amount of rainfall received. According to the report, about 39% of the season's wheat crop has been planted so far. The wheat in

Argentina is planted in June and July and harvested in December and January.

In June, heavy rains in eastern Argentina caused some delays in planting wheat. But experts say the storms should end up helping farmers grow more grain this season as water supplies are being replenished.

Other Cereals

Argentina's maize crop in the 2018/19 period reached 57m tons. The estimates were of 56m tons. The report also slightly reduced the government's 2018/19 soybean crop estimate to 55.6m tons, down from 55.9m tons.

After reaching a record volume last year, **Brazilian agribusiness shipments remain firm in 2019.** According to research conducted by Esalq/USP's Cepea (Center for Advanced Studies in Applied Economics) exports of Brazilian agribusiness products grew by 8% in volume terms in the first four months of this year compared to the same period last year. Meanwhile, revenues only grew 0.3% over the same period. Cepea pointed out that this was due to the fall in average prices. In addition, the appreciation of Brazil's currency caused Brazil's products to be more expensive. Hence, it was the sheer volume exported that kept growth in revenues positive.

Exported products

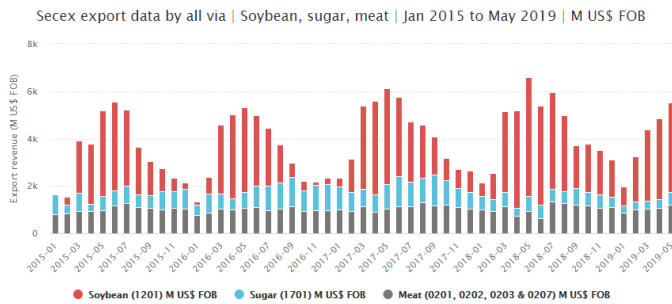
Cotton was the commodity that saw the greatest rise in shipments during the first four months of this year, increasing 75% year-on-year, with Brazil being ranked second in terms of international sales. Foreign sales of corn and coffee also showed significant growth at 42% and 32% respectively. Researchers at Cepea indicate that it should be a promising year for cotton, corn, and meat. It is expected that meat exports, especially to Asian countries, will continue to increase.

Destiny

China remains the main trading partner for Brazil's agribusiness exports, mainly comprising soybean complex, especially soybeans. Europe is the second largest destination for its agricultural products and the United States is third. Countries that make up the "others" group also have a significant 30% share of the total, especially Asian countries.

This should be another year of good grain harvest, which should keep product availability high, both for domestic consumption and for export. The exporter must keep an eye on the trade dispute between China and the United States, given that this favors Brazil, allowing it to maintain a larger share of agricultural product exports to China, including the meat market. On the other hand, prices on the international market have come down.

One must also consider the effect of the exchange rate. The Real has depreciated more strongly in recent months, which helps maintain the attractiveness of Brazilian products in the foreign market, favoring growth of export volumes. If the national currency remains devalued, the real turnover of the sector can continue growing in 2019.



Brazilian soybean prices fell after US President Donald Trump signaled on Twitter that trade tensions between the United States and China may decline again, opening up the possibility for tariffs to be removed between the two countries.



Had a very good telephone conversation with President Xi of China. We will be having an extended meeting next week at the G-20 in Japan. Our respective teams will begin talks prior to our meeting.

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Trump and Chinese President Xi Jinping are expected to resume trade talks at the next G20 summit.

If trade negotiations between the two countries thrive, American soybeans could be exported to China later this year, creating strong competition for Brazilian soybeans, which are currently sold at a high price. China imported a large volume of Brazilian soy in early June after trade negotiations with the United States failed.

According to Agroconsult, **Brazil will export a record 38m tons of corn in 2019.** Motivated by the country's bumper harvest and delayed cereal planting in the United States, the consultancy revised the figures released in March upwards, which had previously forecast exports of 31m tons.



Respondendo a @rallydasafra

As vendas externas devem chegar a 38 milhões de toneladas, conta 24 milhões de toneladas na safra passada.

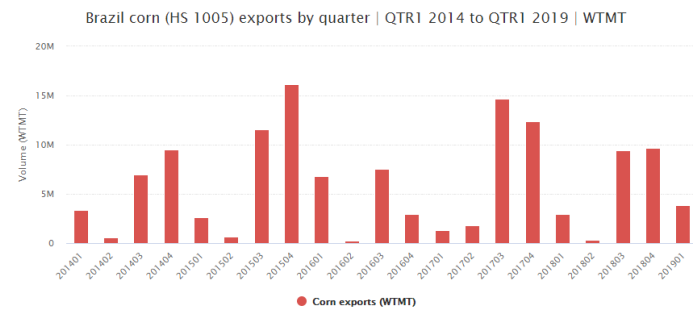
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Last year, crop failure limited Brazilian corn exports to only 24mn tons. According to government data, the country's annual record is 31m tons exported, reached in 2017.

According to Agroconsult, American corn is currently expensive due to limited supply. Whilst in a normal harvest the US would produce about 380m tons, this year's forecast is that it will reach 328m tons or less. As a result, Agroconsult's expectation is that Brazil will recover some of the markets it lost last year, including, but not limited to, exports to the United States.

Agroconsult estimated Brazil's total corn production in 2019 at 101.2m tons. It says this volume will be possible thanks to record production of the second crop, estimated by Agroconsult at 74.6m

tons. Brazil's consumption of corn, which is dictated by the poultry and pork industry, will exceed 60m tons this year for the first time, according to Agroconsult.



Bolivia plans to shift more than 70,000 tons of cargo via the Peruvian port of Ilo in 2019. The cargo handled so far in the year has already increased by 280% year-on-year, with 25,000 tons moved between January and April. According to Bolivian policy, this figure is expected to reach almost half a million tons for both imports and exports, which will allow it to be less dependent on Chilean ports.

According to Bolivia one of the advantages of the Port of Ilo over Chilean port Arica, is the quick receipt and despatchment of the cargo. This agility translates into fewer costs for users. Other elements that are an advantage for Ilo are coordination with the contracted transport company and interaction with customs since there are many Bolivians working at the port. Bolivia already began this diversification strategy away from the Port of Arica in 2018 when it lost 91,660 tons of Bolivian cargo that it had handled until then.

On Tuesday (06/06), **the federal government launched the 2019/2020 Safra Plan to support national agricultural production by supporting small, medium and large producers.** For this, the plan foresees an investment of R\$225bn, of which R\$222.74bn will be for rural credit (funding, commercialization, industrialization, and investments), R\$1bn for the Rural Insurance Premium Grant Program, and R\$1.85bn for marketing.

A novelty for the 2019/2020 Safra Plan is creation of the Fraternal Guarantee Fund (FAF), which aims to facilitate rural producers' debts with banks, distributors or agro-industries. In total, the BNDES already has R\$5bn for these renegotiations. In addition, small farmers will have R\$500m available to finance the construction or renovation of housing. These resources will allow for the construction of up to 10,000 houses.

Another new initiative in the 2019/2020 Safra Plan is to allow the producer to offer part of his property as a guarantee for agricultural financing. Currently it is only possible to offer the entire property as a guarantee.

Ore

Vale reported on Tuesday (19/06) that it is considering building a new railway and port in the state of Pará as an outlet for the Carajas Serra Sul mine owned by it.

According to the company, the new railroad would extend 400km from the current Carajás railroad to Vila do Conde Port in the state of Maranhão. The measure could contribute to the "demise" of the Port of Ponta da Madeira (Maranhão), currently used by the

mining company. In May Vale had reported that it was considering doubling its production at the Serra Sul mine to 150m tons per year.

Brucutu reopening

More news on Vale is that the mining company announced on Wednesday (19/06) that operations at Brucutu Island will be resumed within 72 hours. This is because the STJ (Superior Court of Justice) suspended the decision made by the Minas Gerais Court of Justice that prevented the activities of the Laranjeiras dam in Brucutu. With this, there will be an increase in the average quality of its products.

Oher cargo

A technical study carried out by the State deputy's office Tum (PSC-BA) indicates that the Port of Aratu in Salvador may be a viable alternative for fruit exports from the São Francisco Valley. According to the deputy, shipment by sea may represent a saving of up to US\$1,000 per lot shipped.

The study was presented by the Bahia's deputy to the Secretary of Agriculture, Livestock, Irrigation, Fisheries and Aquaculture, Lucas Teixeira. "Our objective initially is to carry out in depth viability studies and hence create a technical cooperation so that our fruit can be exported via our state, as a way to generate even more dividends for all the people of Bahia", he affirmed.

The São Francisco Valley, located in the north of Bahia, accounts for a large portion of Brazil's fruit production, exporting mainly mangoes and grapes to several countries such as Belgium, Holland, and Spain. Most of the exports go from farms located in cities such as Casa Nova and Juazeiro, but exports are still done via the port of Suape in Pernambuco State.

Bahia exports rise in May

Still on Bahia, according to Bahia's Planning Secretariat (Seplan), Bahia's exports recovered in May, reaching US\$758.2m – a 27.4% year-on-year increase. Considering the accumulated total between January and May, exports grew 2.5% to US\$3.15bn.

Export volumes have grown 22.3% in volume terms so far in 2019, driven by items such as oil, pulp, petrochemicals, metallurgy, cotton, and cocoa products. The exception was soybeans, which registered a decrease of 11.6%.

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Your contributions, criticisms, suggestions and, if you do them, press releases, will be welcome. Contact: datamarweek@datamar.com.br

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