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Report Highlights:

The U.S.-Peru Trade Promotion Agreement (PTPA) has significantly benefitted U.S.-origin food and agricultural product exports to Peru. Despite Peru's 2015 economic slowdown, demand for U.S. consumer-oriented foods should exceed the \$230 million by year's end; recording their second highest dollar figure since the PTPA's implementation in 2009. U.S. consumer-oriented food exports to Peru in 2014 grew to a record \$240 million (highest export level since calendar year – CY 1970), up by \$176 million or 280 percent compared to CY 2009 levels. The United States with a market share of almost 20 percent is Peru's major supplier of consumer-oriented food products. Improving economic growth in 2016-19, will further stimulate demand for U.S.-origin product.

SECTION I: MARKET SUMMARY

Peru's real gross domestic product (GDP) grew only 2.4 percent in 2014, sharply down from earlier projections of 5.5-5.6 percent. The slump is attributed to the fall in global metal prices (i.e., copper and gold), negatively affecting the country's export revenues. Peru's GDP is estimated to grow to 2.7 percent in 2015 and then to 3.6 percent in 2016. The mining and hydrocarbon sectors remain key drivers of the economy despite falling global metal prices related to weakening demand from China. Growth in 2016-17 will be boosted by the implementation of new infrastructure and mining projects. Peru's nominal GDP in 2015 is estimated at \$189.5 billion, down 6.5 percent or off by \$13 billion from 2014's level. Peru's nominal GDP is forecast to reach \$191 billion in 2016. Downsize risks persist given Peru's vulnerability to weaker demand for its extractive export commodities (e.g., copper).

Prior to the economic slowdown commencing in 2014, Peru for over a decade had been one of the world's top performing economies; registering sustained high growth accompanied by low inflation. The Central Bank (Banco Central de Reserva del Perú – BCRP) has a core inflation band target of 1-3 percent, which Peru maintained through 2013. Peru's consumer price inflation reached 3.2 percent in 2014 and is estimated to average 3.4-3.5 percent in 2015. Adverse weather in the form of a strong-to-severe El Niño in 2015/16 could disrupt agricultural production and drive up food prices. Further currency depreciations will increase import costs and lead to inflation. The forecast is for economic growth gathering momentum and oil prices recovering slightly in the medium-term, inflation will remain above the BCRP's target level through 2016-19.

The U.S.-Peru Trade Promotion Agreement (PTPA) has significantly benefitted U.S.-origin food and agricultural product exports. U.S. consumer-oriented food exports to Peru in 2014 grew to a record \$240 million (highest export level since calendar year – CY 1970), up by \$176 million or 280 percent compared to CY 2009 levels. Despite Peru's 2015 economic slowdown, demand for U.S. consumer-oriented foods should exceed the \$230 million by year's end; recording their second highest dollar figure since the PTPA's implementation in 2009. The United States with a market share of almost 20 percent is Peru's major supplier of consumer-oriented food products. Improving economic growth in 2016-19, will further stimulate demand for U.S.-origin product.

FAS Lima believes that Peru's demand for imported food and agricultural products will remain good through the medium-term. Improving economic growth in 2016-19, will further stimulate demand for U.S.-origin product. We expect 2015 total retail food sales reaching \$19.5 billion; some \$3.9 billion or about 20 percent will be in supermarket sales. Domestic consumption will benefit in the medium-term from government stimulus measures seeking to boost consumer spending and maintain investor confidence.

FAS Lima estimates U.S.-origin food processing ingredients exports to Peru reaching \$280 million in CY 2015, an increase of \$14 million or five percent compared to 2014. Driving growth in CY 2015 (January-October) are fats and oils, that at \$71.2 million are up \$27 million or 62 percent compared to 2014. Beer and wine (up 42 percent), pet food (up 38 percent), and baby food (up 31 percent) are the next best performing categories.

FAS Lima sources report that total food service in 2015 reached \$7.8 billion. The draw of Peru's international tourist destinations, like Cuzco, provides a tremendous platform as well. Casual dining restaurants accounts for 30 percent of total restaurant sales.

The best prospects for U.S.-origin food products reside in supplying high-end hotels and restaurants. Casual dining and family-style restaurants, along with coffee shops and fast food chains (averaging eight percent growth over the past five years), also afford good possibilities.

Although Lima accounts for one third of Peru’s population of 30 million (Central Intelligence Agency, July 2015 estimate), strong demand in the interior of the country is driving new supermarket openings. Cuzco, Ucayali, Huanuco, Moquegua and Cajamarca are being targeted by shopping center developers, utilizing supermarkets as anchor stores. Demand is strongest for imported U.S. products in the form of canned goods, packaged foods, and ready-to-eat meals.

Peru’s food retail market includes 224 modern retail food stores (154 in Lima). Modern grocery retailers such as supermarkets chains and convenience stores are expanding into Lima’s lower-middle income districts. Modern retailers are benefitting from consumers’ improved access to credit, enticing buyers with deep discounts on certain items when utilizing store credit cards.

Table 1: Main Economic Indicators, Ecuador, Expenditure of GDP (Percentage)

	2013 Actual	2014 Actual	2015 Estimate	2016 Forecast
Nominal GDP (\$ billions)	201.8	202.7	189	191
Real GDP Growth	5.7	2.4	2.7	3.6
Consumer Price Inflation	2.8	3.2	3.5	3.6
Imports of Goods and Services (\$ billions FOB)	\$44.0	\$42.6	\$36.9	\$39.8
Private Consumption (% real change)	5.3	4.1	3.6	3.7
Public Sector Consumption (% real change)	6.8	9.9	6.9	6.0
Exports of Goods and Services (\$ billions FOB)	\$42.8	\$39.5	\$32.6	\$41.6
Unemployment Rate	6.5	6.2	6.1	5.9

Sources: Central Bank (BCRP), National Statistics Institute, Central Intelligence Agency, FAS Lima office research.

General and Agricultural Export-Import Trade Situation

U.S.-Peru bilateral food and agricultural products trade in CY 2015 (January-October) at \$2.4 billion is down \$70 million or about three percent lower compared to 2014’s record high of \$3.17 billion. The [U.S.-Peru Trade Promotion Agreement](#) has been instrumental in boosting bi-lateral trade in food and agricultural products between the United States and Peru. Five years after entering into force (February 1, 2009), trade between the two partners reached record highs. From 2009 to 2014, bilateral food and agricultural products trade jumped from \$1.4 billion to \$2.4 billion – a 71 percent increase. From 2009 to 2014, U.S. exports of food and agricultural products to Peru jumped from \$530.3 million to \$1.28 billion – nearly a 142 percent increase.

The U.S.-Peru Trade Promotion Agreement strengthens U.S.-origin food and agricultural products’ competitiveness within the Peruvian market. High-end consumers are familiar with the quality of U.S. products. FAS Lima foresees exports of U.S.-origin consumer-oriented products to Peru becoming as important as U.S. bulk commodity exports in the next few years.

U.S. food and agricultural product exports to Peru at \$939 million in CY 2015, are down \$25 million or about three percent lower compared to 2014 levels; U.S. food exports in 2014 reach a record high of \$1.28 billion and in 2015 will again surpass the one billion dollar mark. Peru’s imports of U.S.-origin soybeans (\$42 million) and soybean meal (\$84 million) are at record highs, imports of U.S. soybean oil (\$65 million) are also going strong.

Peru’s food and agricultural products exports to the United States at \$1.45 billion are down \$46 million or about three percent lower compared to 2014 levels. Peru’s food and agricultural products exports to the United States reach a record high of \$1.88 billion in 2014. The consumer-oriented food category accounts for 70 percent of U.S. total food imports from Peru. Exports to the United States of other fresh fruit (\$320 million), fresh vegetables (\$251 million), and processed fruit and vegetables (\$235 million) are doing well, while its exports of other dairy products (\$16 million) and of bananas and plantains (\$35 million) are at record highs in 2015.

Peru provides preferential tariff treatment to fellow Andean Community (CAN) members Bolivia, Colombia, and Ecuador, as well as to Mexico, Paraguay, Argentina, Brazil, Uruguay, and Cuba. Chile remains the United States’ chief competitor within the Peruvian imported fruit market. Proximity, along with year round supply allows Chile’s fruit to sell in the Peruvian market at lower, more competitive prices.

Advantages and Challenges Facing U.S. Products in Peru

Advantages	Challenges
<ul style="list-style-type: none"> - The U.S.-Peru Trade Promotion Agreement (PTPA) grants duty-free access to two-thirds of all U.S.-origin food and agricultural products, including high-value food products. - An active supermarket industry that is promoting increased demand for high-value food products. - Growth of new supermarket outlets in Lima’s suburbs of Lima and other cities. - Appreciation for U.S. food quality and culture. - Perception of modern retail outlets as cleaner, convenient and time saving. - Increased health consciousness among the Peruvian population. - Middle-class expansion. 	<ul style="list-style-type: none"> - Consumers prefer to buy fresh produce in traditional markets. - Supermarkets, the main source of imported food products, account for only 30 percent of the retail food market share in Lima and 12 percent in the provinces. - New local food brands are appearing in the market at very low prices. - Provincial supermarkets are supplied by Lima-based companies. - Lack of brand awareness among some consumers. - Government organized food promotion campaign called “Buy Peruvian.” - Traditional markets dominate retail sales in secondary cities. - Domestic producers manufacture more affordable product according to local taste preferences.

SECTION II: EXPORTER BUSINESS TIPS

Supermarket chains are the main channel for marketing imported food products. These target mainly middle- and upper-income consumers. FAS Lima recommends that exporters of U.S. food and agricultural products contact large importers, wholesalers/distributors or supermarkets directly. Exporters should approach gas marts, grocery (bodegas), and convenience stores through local importers/wholesalers/distributors. Importers generally purchase based on price and quality. There exists however niche markets for higher-value products for upper-income consumers, where pricing is not necessarily a concern.

Be diligent in selecting an agent or a representative. Visits to Peru and face-to-face meetings here are highly recommended. Conduct a background check of the prospective partner before signing permanent contractual arrangements. The local partner selected should provide information on consumer trends, as well as identify niche markets, market development activities, and business practices.

Road Map for Market Entry

FAS Lima recommends that U.S. exporters consider the following steps:

- Identify the distribution channel that will best fit the export company's market strategy.
- Depending of the channel chosen, identify a strategic import partner.
- Obtain the sanitary registration either directly or through a local partner.
- Request import permits as required.
- Forward to the import partner copies of customs clearance documentation prior to shipment.
- Provide ongoing support to the importer to help build consumer demand.

Food Standards and Regulations

Sanitary inspection, food registration, packaging and control regulations for food and beverages are contained in Supreme Decree No. 007-98-SA (September 25, 1998). The Ministry of Health's Directorate General for Environmental Health ([Dirección General de Salud Ambiental](#) - DIGESA) is the U.S. Food and Drug Administration's (FDA) counterpart; it regulates the registration and supervision of processed foods and beverages.

The Ministry of Agriculture's National Food Safety and Quality Service ([Servicio Nacional de Sanidad y Calidad Agro-Alimentaria](#) - SENASA) develops and implements Peru's sanitary and phyto-sanitary regulations; its U.S. counterparts are the Animal and Plant Health Inspection Service (APHIS) and the Food Safety and Inspection Service (FSIS).

The National Institute for the Defense of Competition and for the Protection of the Intellectual Property (INDECOPI) is responsible for trademarks and labeling standards and controls; it promotes competition, protects intellectual property, and ensures quality.

General Import and Inspection Procedures

To clear Peru Customs (SUNAT), imports must count with a Unique Customs Declaration (DUA), a commercial invoice, an airway bill or bill of lading, a packing list, and an insurance letter. Imports must also be accompanied by a DIGESA food sanitary registration for processed food products. For animals, plants or their by-products a health certificate is required.

The customs agent transmits the DUA electronically to SUNAT, which assigns a level of customs clearance control. SUNAT channels imports along a green, orange, or red lane. The green lane permits entry of the product upon payment of duties. The orange lane requires additional documentation review; while the red lane requires both a document review and physical inspection.

Food and Beverage Sanitary Registration

The registration process must be initiated by a SUNAT registered company, in possession of a valid tax identification number (RUC). DIGESA registration information must be uploaded to the VUCE website (*Ventanilla Unica de Comercio Exterior*). This site handles formalities for goods transiting, entering or leaving Peru. Requirements include:

- Simplified Trade System Form (SUCE - *Solicitud Unica de Comercio Exterior*) must to be filled out on the [VUCE website](#).
- A physical/chemical and microbiological quality analysis from a quality control laboratory, the analysis must be performed by an authorized laboratory in Peru.
- A certificate of free sale and use issued in the country of origin within the past year. DIGESA accepts certificates of free sale and use issued by a state Department of Agriculture or chamber of commerce of the locality where the product is manufactured.
- Labeling information.
- Compositional analysis performed by an INDECOPI accredited laboratory for food and beverage products; analysis performed must indicate nutritional properties.
- Payment of administrative fees.

Sanitary registration, or renewal, occurs only if the application complies with all established requirements. This procedure should take no more than seven working days. Verification of the product's sanitary quality is carried out after sanitary registration or renewal. Sanitary registration of food and beverages are valid for five-years from date of issue. Renewals must occur between seven and sixty days of the registration's date of expiry. For additional information, see our FAIRS – Food and Agricultural Import Regulations and Standards Narrative Country Report 2015.

Certificates for Animals, Plants and By-Products

Prior to shipment, an import permit must be opened with Peru's SENASA. A copy of the permit must be forwarded to the exporter. The exporter must provide the importer with an official health certificate from the country of origin. SENASA port inspectors verify compliance with import requirements. For new to market animal and plant products, a risk assessment must be carried out in accordance with the Andean Community, World Trade Organization (WTO), Codex *alimentarius* (CODEX), or World Organization for Animal Health (OIE) recommendations, as well as per the sanitary requirements of the exporting country.

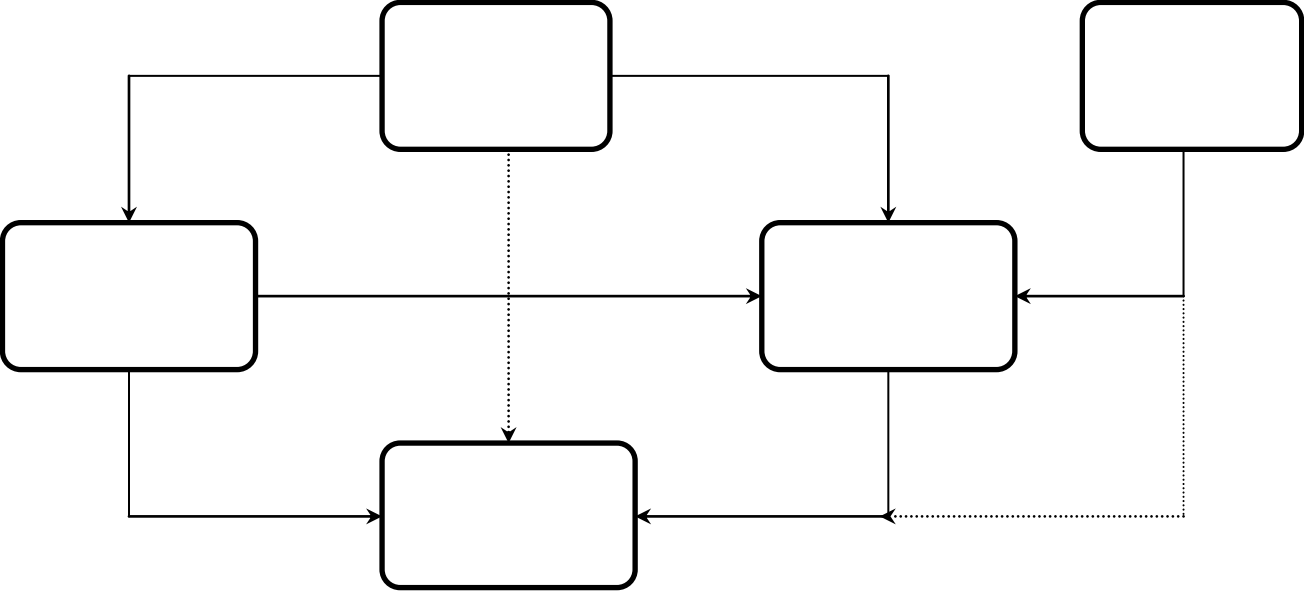
Certificates for animal and plant and their by-products must be error free, contain no pen or ink changes, or have any other type of amendments. If applicable the product must be packaged in food safe packaging, labeled in accordance with U.S. regulations. The product must identify its content, net weight and the facility where it was produced. USDA’s Animal and Plant Health Inspection Service (APHIS) issues sanitary/phyto-sanitary certificates for animals, plants and their by-products. USDA’s Food Safety and Inspection Service (FSIS) will certify meat and its byproducts, while the Agricultural Marketing Service (AMS) issues certifications for U.S. dairy products.

Labeling Requirements

Imported packaged foods must carry a separate adhesive label before reaching the point of sale. A Spanish language translation of the label must include the importer/distributor’s contact information. Peru’s [Manufactured Products Labeling Law 28,405](#) (November 30, 2004) requires labeling for all value-added products ([Peru’s Congress is proposing to amend articles 5, 6, and 7](#)). Non-compliant value-added products must be properly relabeled; this is to occur prior to customs clearance. For additional information, see our FAIRS – Food and Agricultural Import Regulations and Standards Narrative Country Report 2015.

SECTION III: MARKET SECTOR STRUCTURE AND TRENDS

Market Structure



- Major supermarket chains are forceful negotiators.
- Supermarket suppliers supply a wide range of products.
- Major food importers/distributors supply all major supermarket chains and provincial retailers. Major supermarket chains will request product exclusivity.
- Food products are often imported in consolidated containers.
- Major supermarket chains import high-end products directly to earn higher margins.
- Distributors and wholesalers conduct frequent in-store promotional activities, assigning their

own support personnel in each store.

Retail Food Sector

FAS Lima forecasts Peru's demand for imported food and agricultural products to remain good through the medium-term. Improving economic growth in 2016-19, will stimulate demand for U.S.-origin product. We expect 2015 total retail food sales reaching \$19.5 billion; some \$3.9 billion or about 20 percent will be in supermarket sales. Domestic consumption will benefit in the medium-term from government stimulus measures seeking to boost consumer spending and maintain investor confidence.

Peru's food retail market includes 237 modern retail food stores, with 159 alone in Lima. Twelve new stores (five in Lima and seven in provinces) were opened in 2014, representing however the lowest growth in the past six years. Three stores have been opened in first half of 2015; six additional stores will be opened prior to the end of 2015. Modern grocery retailers such as supermarkets chains and convenience stores are expanding into Lima's lower-middle income districts as well. Modern retailers are benefitting from consumers' improved access to credit, enticing buyers with deep discounts on certain items when utilizing store credit cards.

The traditional channel includes corner stores (i.e., bodegas/small grocery stores) and open markets, which together account for 80 percent of all food purchase sales. These corner stores benefit from proximity to consumers, usually within walking distance of most households. Catering primarily to lower-income groups, Peru's small independent grocers specialize in providing a mix of affordably priced goods in smaller retail package sizes.

Best prospects for U.S. exporters within the consumer-oriented category reside with snacks foods, fruit and vegetable juices, fresh fruit (i.e., pears, apples, and grapes), and canned fruits and vegetables. Dairy products (especially cheese), beef and poultry meat and their byproducts, and pet food along with wine and liquor also evidence strong possibilities.

Food Processing Sector

FAS Lima estimates U.S.-origin food processing ingredients exports to Peru reaching \$280 million in calendar year (CY) 2015, an increase of \$14 million or five percent compared to 2014. Driving growth in CY 2015 (January-October) are fats and oils, that at \$71.2 million are up \$27 million or 62 percent compared to 2014. Beer and wine (up 42 percent), pet food (up 38 percent), and baby food (up 31 percent) are the next best performing categories.

Peru's processed foods category is estimated to surpass \$7.8 billion in CY 2015 sales. Baked goods (\$2.6 billion) and dairy products (\$2.4 billion) both of which are up four percent in 2015 dominate the category. New packaged bread products are helping to boost demand for baked goods. Dairy products increase is attributed to growing demand for canned and evaporated milk products by Peru's low-income families.

Key players include Grupo Gloria, ALICORP, and San Fernando. There are some 3,000 companies in Peru engaged in food processing. The 50 largest food processors are reporting CY 2015 sales of \$22.5 billion. The food processing sector is forecast to grow, despite the current economic slowdown, as domestic consumption benefits from stimulus measures boosting consumer spending and continued investor confidence.

Local food manufacturers have tapped into consumers' demand for quality at affordable prices. Food manufacturers source both domestic and imported product ingredients for their food product manufacturers. These are successfully tailoring product to consumers' demand for healthier food products. Some manufacturers are now producing food products for distribution through vending machines to meet time-starved consumers' demand for a quick fix.

HRI Food Service Sector

FAS Lima sources report that total food service in 2015 reached \$7.8 billion. The draw of Peru's international tourist destinations, like Cuzco, provides a tremendous platform as well. Casual dining restaurants accounts for 30 percent of total restaurant sales.

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The National Statistics Institute (INEI) reports that 33 percent of consumer's food expenditures today are allocated towards restaurant meals. Demand for restaurant meals is forcing the foodservice category to become more competitive; roughly 14,000 restaurants open yearly. The Ministry of Foreign Trade and Tourism (MINCETUR), estimates that the country counts with 200,000 full service restaurants; Lima alone has 66,000 restaurants.

The best prospects for U.S.-origin food products reside in supplying high-end hotels and restaurants. Casual dining and family-style restaurants, along with coffee shops and fast food chains (averaging eight percent growth over the past five years), also afford good possibilities.

SECTION IV: BEST HIGH-VALUE PRODUCT PROSPECTS

Best Consumer-Oriented Product Prospects

Product/ Product Category	2014 Market Size estimate	2014 Imports	2009-14 Average Annual Import Growth	Import Tariff Rate	Key Constraints Over Market Development	Market Attractiveness for USA
Cheese (HS 0406)	24,956 MT	4,394 MT \$24 million	14%	0406.10, 0406.20, and 0406.40: 0% 0406.30 and 0406.90: 0%	Competitor Market Share Argentina: 23 percent Netherlands: 6 percent. Strong preference for EU cheese at high-end HRI and Retail Sectors	<ul style="list-style-type: none"> - U.S. cheeses are used in the food processing sector, but also have potential in the HRI and retail food sectors. - The United States with a market share of 48 percent is the largest supplier. - PTPA: 17 years linear; 2,500 MT quotas with a 12 percent per annum increase.
Confectionary (non-chocolate) (HS 1704)	24,000 MT	17,458 MT \$48 million	13%	0%	Competitor Market Share Colombia: \$32 million China: \$4 million Strong local competition. Major owners are foreign companies	<ul style="list-style-type: none"> - The United States accounts for three percent of total imports (\$1.3 million in 2014).
Confectionary (chocolate) (HS 1806)	24,500 MT	5,548 MT \$25 million	15%	0%	Local industry is competitive	<ul style="list-style-type: none"> - The United States' strength is in retail sector chocolate. - The United States with a market share of 14 percent is the largest supplier.
Food Preparations (HS 2106.90)	N/A	19,000 MT \$180 million	18%	0%	Competitors: ALICORP (Peru); local presence is strong, foreign companies present.	<ul style="list-style-type: none"> - The United States with a market share of 23 percent is the largest supplier.
Prime and Choice Beef (HS 0202.30)	Total Beef and Offal Market: 296,782 MT	2,000 MT \$13 million	41%	0%	Competition with quality beef cuts from Bolivia, Argentina, and Uruguay	<ul style="list-style-type: none"> - Consumers' increased purchasing power is driving demand for quality U.S. beef. - United States holds 47 percent market share of imported beef.
Edible Beef Offal (Liver) (HS 0206.22)	12,000 MT	4,142 MT \$5.5 million	0%	0%	Local production covers most of the market size	<ul style="list-style-type: none"> - The United States with 67 market share is the largest supplier.
Fruit and Vegetable Juices (HS 2009)	N/A	20,636 hl \$10.9 million	54%	0%	Competitors: Brazil: 7 percent	<ul style="list-style-type: none"> - Imports from the United States are up 258 percent since 2013. - The United States with

						80 percent of market share is the largest supplier.
Pet Foods (HS 2309.10)	46,000 MT	16,244 MT \$22.4 million	12%	0%	Competitors: Argentina: 49 percent Colombia: 15 percent Growing local pet industry. Informal industry.	- The United States holds a 24 percent import market share.
Turkey (HS 0207.27)	36,000 MT	7,055 MT \$6.5 million	8%	0%	Competitors: Brazil: 84 percent Strong local poultry industry.	- Peruvians consume turkey at Christmas and New Year's. - Growing food retail sector. - USAPEEC has initiated a market penetration plan. - The United States holds 14 percent market share.
Poultry Meat Cuts (HS 0207.14)	1.8 Million MT	10,949 MT \$11 million	45%	TRQ: 15,117 MT 0%	Competitors: Brazil: 26 percent Strong local competition. Frozen is not common.	- Peru is a major consumer. - TRQ: six percent increase per annum. Only 15 percent of TRQ is being utilized.
Bread, Pastry, Cookies (HS 1905)	N/A	5,789 MT \$17.6 Million	7%	0%	Competitors: Colombia: 26 percent Strong local competition.	- The United States holds 14 percent of market share.
Soups and Broths (HS 2104)	N/A	1,279 MT \$4 million	9%	0%	Competitors: Chile: 30 percent Strong local competition.	- The United States with 31 percent market share is the largest supplier.
Sauces (HS 2103)	N/A	6,663 MT \$15 million	11%	0%	Strong local competition.	- The United States holds 14 percent market share.
Nuts and Almonds (HS 0802)	N/A	1,131 MT \$9 million	50%	0%	Competitors: Chile: 23 percent; very competitive in almonds and walnuts production	- Importers recognize the superior of U.S. nuts and almonds. - U.S. exports have grown 85 percent in 2014. - The United States with 73 percent market share is the largest supplier.
Wine (HS 2204)	41 million liters	9 million liters \$37 million	17%	0%	Competitors: Argentina: 39 percent Chile: 27 percent Spain: 14 percent Small niche market for U.S. wines	- Niche market for quality wines. - Peru's wine consumption is growing to 1.3 liters/person. - Import value has grown 76 percent in respect 2013. - Demand for low cost

						wines.
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Note: HS = Harmonized Tariff System. TRQ = Tariff Rate Quota, on a first-come first-serve basis.

Sources: World Trade Atlas, FAS Lima office research, Office of the U.S. Trade Representative (USTR), Ministry of Agriculture, Gestion and El Comercio (Peru) Newspapers.

SECTION V: KEY CONTACTS AND FURTHER INFORMATION

U.S. Embassy Lima, Foreign Agricultural Service (FAS) Office of Agricultural Affairs
Mailing Address: FAS OAA Lima, Unit 3785, DPO, AA 34031
Phone: (511) 434-3042 • Fax: (511) 434-3043 • E-mail: Aglima@usda.gov

For additional information, see www.fas.usda.gov. See also to our Food and Agricultural Import Regulations and Standards (FAIRS) reports, FAIRS Export Certificate, Food Processing Ingredients Sector, and HRI Food Service Sector GAIN reports.

Trade Associations

American Chamber of Commerce Peru – Executive Director: Aldo Defilippi
Address: Av. Ricardo Palma 836, Miraflores, Lima 18
Phone: (511) 705-8000 • Fax: (511) 241-0709 • www.amcham.org.pe

National Society of Industries (SNI) – President: Andreas von Wedemeyer
Address: Los Laureles 365, San Isidro - Lima 27
Phone: (511) 616-4444 • Fax: (511) 616-4433 • www.sni.org.pe

Hotel and Restaurant Association (AHORA) – President: Freddy Gamarra
Address: Av. Benavides 881, Miraflores, Lima 18 • Phone: (511) 444-4303 • Fax: (511) 444-7825 • E-mail: ahora@ahora-peru.com • www.ahora-peru.com

Ministries and Government Agencies

Ministry of Agriculture (MINAG) – Minister: Mr. Juan Manuel Benites
Address: Av. La Universidad N° 200 – La Molina
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National Agricultural Sanitary and Phytosanitary Service (SENASA) – Director: Jorge Barrenechea
Address: Av. La Molina 1915 – Lima 12
Phone: (511) 313-3300 • Fax: (511) 340-1486 • www.senasa.gob.pe

General Environmental Health Bureau (DIGESA) – Director: Mrs. Monica Saavedra
Address: Las Amapolas 350, Urbanización San Eugenio - Lima 14
Phone: (511) 442-8353 • Fax: (511) 422-6404 • www.digesa.minsa.gob.pe

Customs (SUNAT) – Superintendent: Mr. Victor M. Ramos
Address: Av. Garcilazo de la Vega 1472 – Lima 1
Phone: (511) 315-3300 • Fax: (511) 315-3318 • www.aduanet.gob.pe

National Institute for the Defense of Competition and for the Protection of the Intellectual Property (INDECOPI) – President: Mr. Herbert Tassano
Address: Calle de la Prosa 138 - San Borja • Phone: (511) 224-7800 • Fax: (511) 224-0348 • www.indecopi.gob.pe

APPENDIX - STATISTICS

Table A: Key Trade and Demographic Information

Agricultural Imports From All Countries (\$Mil) / U.S. Market Share (%) ^{1/}	\$4.58 billion/ 24%
Consumer Food Imports From All Countries (\$Mil) / U.S. Market Share (%) ^{1/}	\$1.27 billion/ 19%
Edible Fishery Imports From All Countries (\$Mil) / U.S. Market Share (%) ^{1/}	\$176 million/ 1.6%
Total Population (Millions) / Annual Growth Rate (%)	30.4 million/ 0.97%
Urban Population (Millions) / Annual Growth Rate (%)	23.8/ 1.7%
Number of Major Metropolitan Areas	Ten Metropolitan Areas Lima (Capital) 9.8 million
Size of the Middle Class (Millions) / Growth Rate (%)	12.4 million/ 1.9%
Per Capita Gross Domestic Product (U.S. Dollars)	\$11,198 PPP
Unemployment Rate (%)	6.1%
Per Capita Food Expenditures (U.S. Dollars)	\$1,532
Percent of Female Population Employed	68%
Exchange Rate (Jan-Oct 2015)	\$1:00 = S/. 3.15

Sources: (1) FAS-UNTrade, Economist Intelligence Unit, Peru INEI (Instituto Nacional de Estadísticas e Informática), Peruvian Association of Market Research Companies, Central Intelligence Agency, USDA-Economic Research Service, World Bank, FAS Lima office research.

Table B: Consumer Food and Edible Fishery Product Imports (2014)

Peru Imports (In Millions of Dollars)	Imports from the World			Imports from the U.S.			U.S Market Share		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
CONSUMER-ORIENTED AGRICULTURAL TOTAL	1,069	1,137	1,274	176	207	241	16	18	19
Snack Foods (Excl. Nuts)	71	81	81	6	6	5	8	7	6
Breakfast Cereals & Pancake Mix	25	28	27	1	1	1	3	3	2
Red Meats, Fresh/Chilled/Frozen	61	68	72	20	28	28	33	41	39
Red Meats, Prepared/Preserved	7	7	8	1	1	2	13	14	20
Poultry Meat	37	47	43	10	13	10	27	27	23
Dairy Products (Excl. Cheese)	231	193	286	42	44	46	18	23	16
Cheese	18	23	24	8	10	12	47	42	47
Eggs & Products	2	2	2	2	2	1	92	94	53
Fresh Fruit	65	68	69	7	14	12	10	20	17
Fresh Vegetables	0	0	0	0	0	0	0	0	0
Processed Fruit & Vegetables	90	108	111	9	13	15	10	12	14
Fruit & Vegetable Juices	6	6	11	2	2	9	32	39	79
Tree Nuts	10	11	14	2	4	7	24	34	47
Wine & Beer	43	43	44	1	1	2	3	2	4
Nursery Products & Cut Flowers	12	14	18	2	2	6	17	13	33
Pet Foods (Dog & Cat Food)	19	23	22	5	6	5	24	26	24
Other Consumer-Oriented Products	371	416	440	59	62	82	16	15	19
FISH & SEAFOOD PRODUCTS	128	202	62	0	0	0	0	0	0
Salmon	2	3	2	0	0	0	0	0	0
Surimi	0	0	0	0	0	0	0	0	0
Crustaceans	4	7	11	0	0	0	1	0	0
Groundfish & Flatfish	1	37	34	0	0	0	0	0	0
Molluscs	4	2	3	3	1	1	64	47	40
Other Fishery Products	116	153	12	0	0	2	0	0	13
AGRICULTURAL PRODUCTS TOTAL	4,425	4,375	4,581	572	757	1,109	13	17	24
AGRICULTURAL, FISH & FORESTRY TOTAL	4,803	4,842	5,024	599	775	1,133	12	16	23

OBS: Based on latest full calendar year (January-December) data.

Source: World Trade Atlas, FAS Lima office research.

Table C: Top 15 Suppliers of Consumer Foods and Edible Fishery Products (2014)

Peru - Top 15 Suppliers CONSUMER - ORIENTED AGRICULTURAL IMPORTS				FISH & SEAFOOD PRODUCTS					
	\$1,000	2012	2013	2014		\$1,000	2012	2013	2014
United States	176,195	206,176	241,465		Ecuador	61,805	69,398	43,260	
Chile	234,003	248,283	235,049		Thailand	6,238	28,297	35,959	
New Zealand	111,883	74,613	120,739		Chile	11,988	37,580	33,756	
Colombia	83,625	93,803	87,630		China	9,169	11,751	14,203	
Argentina	71,618	76,872	70,814		Vietnam	11,539	7,252	8,753	
Brazil	68,423	63,193	70,696		International Waters	18,405	13,975	8,329	
Mexico	59,525	58,156	58,920		Argentina	6,053	5,277	6,699	
Bolivia	23,827	42,211	56,469		Peru	706	424	4,012	
Netherlands	21,159	23,834	34,908		Spain	721	235	2,932	
Spain	26,487	32,037	28,319		United States	2,936	974	2,815	
Ireland	14,861	14,760	26,058		New Zealand	2,958	1,465	2,282	
United Kingdom	13,220	11,539	24,357		Ghana	1,079	561	2,192	
Denmark	11,328	19,238	21,225		Brazil	571	335	1,916	
China	13,724	13,849	18,730		Belize	0	0	1,605	
Italy	11,847	15,212	17,706		Philippines	0	0	813	
Others	127,093	147,242	164,145		Others	5,924	24,768	6,493	
World	1,068,819	1,141,020	1,277,229		World	140,092	202,293	176,019	

OBS: Based on latest full calendar year (January-December) data.

Source: World Trade Atlas, FAS Lima office research.