

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Required Report - public distribution

Date: 12/26/2017

GAIN Report Number:

Peru

Exporter Guide

2017

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Report Highlights:

For over a decade, Peru has been one of the world's top performing economies, registering sustained high growth accompanied by low inflation. Among Peru's trade agreements is the U.S.-Peru Trade Promotion Agreement. U.S. origin food and agricultural product exports to Peru benefit significantly from the U.S.-Peru Trade Promotion Agreement. Despite Peru's 2017 economic slowdown, demand for U.S. consumer-oriented food is forecast to exceed \$250 million by year's end. This will set a record as the highest year in terms of value for this export category since the U.S.-Peru Trade Promotion Agreement's implementation in 2009.

Post:

Lima

I. Market Overview

For over a decade, Peru has been one of the world's top performing economies, registering sustained high growth accompanied by low inflation. However, Peru's economy has not been immune to the slowdown that Latin American countries have experienced since 2014. The fall in commodity prices (i.e., gold and copper) not only reduced export growth in these economies, but it also drastically dampened investment and prompted capital outflows that weakened currencies. The long-term outlook forecasts a rebound in investment and exports to Peru in 2018-2019, especially in the mining and construction sector.

Peru is a member of a number of bilateral and multilateral trade agreements that have opened new markets for its exports and increased demand for imported goods. This openness to international trade and Peru's growing middle class has transformed domestic food market channels. The number of Commercial Centers in Peru increased from seven in 2000 to 77 in 2016. Total 2017 sales in this sector are forecast at \$8 billion.

Among Peru's trade agreements is the U.S.-Peru Trade Promotion Agreement. U.S. origin food and agricultural product exports to Peru benefit significantly from the U.S.-Peru Trade Promotion Agreement. Despite Peru's 2017 economic slowdown, demand for U.S. consumer-oriented food is forecast to exceed \$250 million by year's end. This will set a record as the highest year in terms of value for this export category since the U.S.-Peru Trade Promotion Agreement's implementation in 2009. The U.S., with a market share of almost 21 percent, is a top supplier of consumer-oriented food products. Improving economic growth in 2017-19, will further stimulate demand for U.S. origin product.

The food market is price-sensitive. The low penetration of supermarket chains in Peru (18 percent) can be seen as an opportunity and challenge for retailers. The traditional channel (82 percent market share), consisting of small independent grocers, targets a large consumer base of low and middle income consumers. They offer a good mix of low to medium priced brands in small packages to favor sales to people with small daily budgets. Proximity is also a highly weighted feature within this market segment. Food products aligned with consumers' preference for convenience, low prices, and daily purchases perform best in the market.

Advantages and Challenges Facing U.S. Products in Peru

Advantages	Challenges
<ul style="list-style-type: none"> • The U.S.-Peru Trade Promotion Agreement 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 and convenience stores in Lima’s suburbs and other cities. • Appreciation for U.S. food quality and culture. • Untapped categories such as refrigerated and frozen products. • 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 25 percent of the retail food market share in Lima and 17 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. • Market access demands higher marketing costs. • Traditional markets dominate retail sales in secondary cities. • Domestic producers manufacture more affordable products according to local taste preferences.

II. Exporter Business Tips

The Peruvian market is complex and constantly evolving due to the low penetration of modern food retail channels. FAS Lima recommends that U.S. suppliers seeking entry into this market conduct thorough preliminary research to determine if there is a potential market for their products. The research should cover key marketing and regulatory issues including consumption trends, size of the market (imports), major distribution channels, current import tariff and local tax structure, and also government regulations and standards. Current U.S. suppliers should also consider consultations with importing partners to determine if any change of marketing strategies for existing products is needed.

Given the level of quality and packaging of U.S. consumer oriented food products the suitable channel for them is through supermarket chains. Supermarkets 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, small independent grocery stores (bodegas), and convenience stores through local importers/wholesalers/distributors. Importers generally purchase based on price and quality. There exists, however, niche markets for high 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; 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.

III. Import Food Standards & Regulations and Import Procedures

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 domestic and imported processed foods and beverages.

The Ministry of Agriculture's National Plant and Animal Health Service ([Servicio Nacional de Sanidad y Calidad Agro-Alimentaria](#) - SENASA) develops and implements Peru's sanitary and phytosanitary regulations. SENASA's U.S. counterparts are the Animal and Plant Health Inspection Service (APHIS) and the Food Safety and Inspection Service (FSIS). The National Quality Control Institute (INACAL) is the competent authority on standardization, accreditation, and metrology.

General Import and Inspection Procedures

To clear Peruvian Customs (SUNAT), imports must be accompanied by 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. 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 be filled out on the VUCE website (www.vuce.gob.pe)
- A physical/chemical and microbiological quality analysis from the manufacturer's quality control laboratory or by a laboratory in Peru accredited by INACAL or any other international accreditation entity recognized by the International Laboratory Accreditation Cooperation or the

Inter-American Accreditation Cooperation.

- Bromatological analysis results issued by a laboratory accredited by INACAL or any other international accreditation entity recognized by the International Laboratory Accreditation Cooperation or the Inter American Accreditation Cooperation.
- List of ingredients and quantitative compositional analysis of food additives, identified by their generic name and international numeric reference (SIN Code).
- Conservation and storing conditions.
- Information about the packaging indicating the type and material used.
- Lifetime information of the product under normal conservation and storing conditions.
- Identification system of the production batch.
- Labeling information.
- Payment of administrative fees.

Along with the signed application form, the importer needs to present the certificate of free sale and use. The certificate is requested by the supplier; normally it is issued by a state's Department of Agriculture or a local chamber of commerce. The label must comply with local regulations (see Section II - Labeling Requirements) and the registration receipt must be presented. All documentation must not be older than one year. A Spanish language translation of the documentation must be attached. For additional information, see our FAIRS – Food and Agricultural Import Regulations and Standards Narrative Country Report 2017.

Certificates for Animals, Plants, and By-Products

Prior to shipment, an import permit must be obtained from SENASA. A copy of the permit needs to 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 animals, plants, 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 and 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 and phytosanitary certificates for animals, plants, and their by-products. USDA's Food Safety and Inspection Service (FSIS) will certify meat and meat by-products, while the Agricultural Marketing Service (AMS) issues certifications for U.S. dairy products.

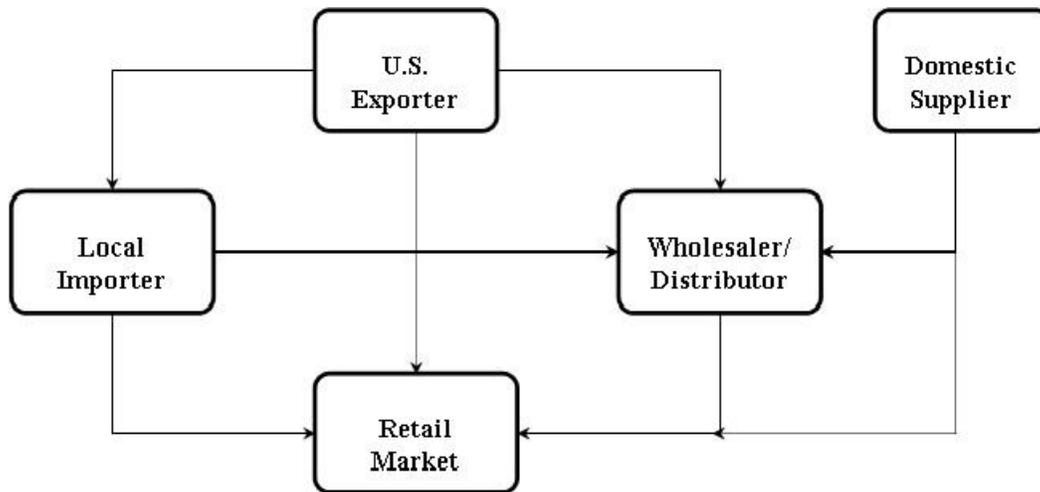
Labeling Requirements

All food and beverage products packaged for sale must be labeled in accordance with the provisions established in INDECOPI's Peruvian Metrological Standards NMP 001:2014 – Packed Products Labeling, as well as per article 117 of Supreme Decree 007-98-SA. An adhesive Spanish language label needs to be applied before an imported product reaches 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. [Supreme Decree 020-2005-PRODUCE](#) lists the products subject to this law; the list is subject to periodic revision. Non-compliant value-added products must be properly relabeled prior to customs clearance. For additional information, see our FAIRS – Food and Agricultural Import Regulations and Standards Narrative Country Report 2017.

IV. Market Sector Structure and Trends



- 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

There are three main supermarket chains in Peru: Cencosud (Wong and Metro), Saga Fallabella (Tottus) and Supermercados Peruanos (Vivanda and Plaza Vea). The market includes 252 conventional supermarkets and superstores, with 169 alone in Lima, and 111 convenience stores, with two outside of Lima. It is estimated that less than six new stores will be opened by the end of 2017. This represents the lowest growth in the past five years. Conventional supermarket chains and convenience stores are expanding into Lima's lower-middle income districts as well. These retailers benefit from consumers' improved access to credit, through which they entice buyers with deep discounts on certain items when utilizing store credit cards.

While the traditional channel holds approximately 80 percent of market share, the modern channel has experienced a high rate of growth in recent years. In 2017, conventional supermarket chain growth is projected at 4.3 percent. Conventional supermarkets are still reporting profits because of the maturity of

some of their outlets opened in 2016 and 2017 and an aggressive discounting campaign to encourage sales.

Higher-end supermarkets carry U.S. liquors, processed food, sauces, fresh and frozen meats, and cheeses. Retailers indicate that less than ten percent of their stock is imported. Most supermarkets target high and middle socio-economic consumer segments, which consider price and quality as key purchase determinants.

Food Processing Sector

The food industry in Peru accounts for almost 27 percent of the industrial GDP and sales are forecasted to reach \$14.3 billion in sales by the end of 2017.

Local food manufacturers have tapped into consumer demand for quality food at affordable prices. They are also successfully tailoring products to meet increasing consumer demand for healthier food products. Food product manufacturers source both domestic and imported product ingredients. Some manufacturers are now producing food products for distribution through vending machines to meet time-starved consumers' demand. Several larger processors import directly from the United States. Small processors rely on local distributors to import their ingredients.

Peruvians prefer fresh food over packaged food, particularly when it comes to vegetables, fruit, meat, and bread. However, packaged rice, pasta, snacks and cookies all have a strong presence in the market. Despite their strong preference for fresh ingredients, Peruvians are also looking for convenience as it is becoming more difficult to prepare large and elaborate meals at home. Therefore, some packaged food categories can be expected to see increased demand. The most successful will be those which are perceived as more natural and healthy while also offering traditional Peruvian flavors.

HRI Food Service Sector

The international recognition of Peru's gastronomy continues in 2017. Three Peruvian restaurants, Mado, Central and Astrid & Gaston are in the top 10 list of the Latin America's 50 Best Restaurants in 2017 occupying the first, second, and seventh position respectively. Recognized as the World's Leading Culinary Destination five times in a row (2012-2016), Peru is a perfect option for foodie tourism in the region.

Besides the growth of independent restaurants, other formats such as food chains have created opportunities in Peru's the food service sector. The expansion of shopping centers is allowing fast food chains and restaurants to reach new consumers. Sixteen new projects are projected for the period 2016-2018 (five projected to start operations in 2017) with an investment of almost \$860 million. Fast food and casual dining restaurants leverage the popularity of shopping centers to open outlets in Lima and the provinces. FAS Lima estimates that 25 percent of all food service sales occur at shopping centers, catering to younger, time-crunched consumers.

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 offer opportunities.

High-end restaurants, casual dining eateries, coffee shops, and fast food chains represent niche market opportunities for U.S. exporters. These establishments absorb 15 to 25 percent of all imported food products. The most frequently imported food ingredients include sauces, meats, processed fruits and vegetables, cheeses, and specialty products such as beef products, pork products, wines, and spirits.

V. Agricultural and Food Imports

BEST HIGH VALUE, CONSUMER-ORIENTED PRODUCTS PROSPECTS CATEGORIES

Product/ Product Category	2017 Market Size est.	2017 Imports	2011-16 Average Annual Import Growth	Import Tariff Rate	Key Constraints Over Market Development	Market Attractiveness for USA
Cheese (HS 0406)	27,750 MT	4,940 MT \$24 million	8%	0406.10, 0406.20, and 0406.40: 0% 0406.30 and 0406.90: 0%	- Competitors: Argentina (17% market share) and Chile (7% market share). - Strong preference for EU cheese at high-end HRI and Retail Sectors	- U.S. cheeses are used in the food processing sector, but have potential in the HRI and Retail Food Sectors. - The United States is the main supplier with a market share of 41 percent. - PTPA: 17 years linear; 2,500 MT quotas with 12 percent increase per annum.
Confectionary – Non Chocolate (HS 1704)	29,000 MT	17,100 MT \$43 million	0%	0%	- Competitors: Mexico and Colombia 39 and 28% market share respectively. - Strong local competition. Major owners are foreign companies	- United States 4 percent of total imports. Total imports estimated from the United States \$1.8 million in 2017

Confectionary – chocolate (HS 1806)	22,500 MT	5,860 MT \$25 million	8%	0%	- Chile is the largest supplier (16% market share). - Local industry is competitive.	- The United States' strength is in chocolate for the retail sector. Holds 15 percent of market share.
Food Preparations (HS 2106.90)	N/A	21,000 MT \$189 million	10%	0%	- Local production is strong. Foreign companies are present in Peru.	- United States is the largest supplier and holds 20 percent of market share. - In 2017 imports from the U.S. are projected to grow 2 percent.
Prime and Choice Beef (HS 0202.30)	Total Beef and Offal Market: 295,000 MT	1,500 MT \$10 million	9%	0%	- Competition with quality beef cuts from Uruguay, Paraguay, Brazil and Bolivia	- Consumers' increased purchasing power is driving demand for high quality U.S. beef. - United States holds 43 percent market share of imported beef.
Edible Beef Offal (Liver) (HS 0206.22)	14,000 MT	4,500 MT \$5.0 million	-6%	0%	Local production covers most of the market size	- The United States holds 77 percent of import market. - Government has initiated a campaign against child anemia.
Fruit & Vegetable Juices (HS 2009)	N/A	42,000 hl \$7.2 million	18%	0%	- Brazil is the second largest supplier with a market share of 24%. Mainly frozen juices.	U.S. is the largest supplier holding almost 34% of market share. - Healthy products are gaining terrain among consumers. - Growth of convenience store sector.

Pet Foods (HS 2309.10)	52,000 MT	19,200 MT \$27.5 million	13%	0%	<ul style="list-style-type: none"> - Growing local pet industry. - Major competitors: Argentina (30% market share), Brazil (24% market share and Colombia (8% market share) 	<ul style="list-style-type: none"> - The United States holds a 27 percent import market share of premium category. - Premium category holds 25 percent of market size.
Turkey (HS 0207.27)	36,000 MT	9,200 MT \$12 million	18%	0%	<ul style="list-style-type: none"> - Major exporter is Brazil (79% market share) - Strong local poultry industry. 	<ul style="list-style-type: none"> - Peruvians are major consumers of turkey during the Christmas and New Year's holidays. - The food retail sector is growing in Lima and in the interior. - U.S. holds 21 percent of import market share.
Poultry Meat Cuts (HS 0207.14)	1.5 Million MT	27.100 MT \$27 million	23%	TRQ: 22,211 MT 0%	<ul style="list-style-type: none"> - Strong local competition. - Frozen presentation is not common. - Brazil is the second largest supplier (44% market share) 	<ul style="list-style-type: none"> - Peru is a major poultry consumer. - TRQ: 6 percent increase per annum. Active presence of USAPEEC in the region. - Food service channel is growing.
Bread, pastry, cookies (HS 1905)	N/A	10,700 MT \$25 Million	19%	0%	<ul style="list-style-type: none"> - Ecuador with a 22 percent import market share is the main supplier. - Strong local competition. 	<ul style="list-style-type: none"> - United States holds 8 percent of import market share. Frozen presentation is becoming attractive for HRI and Food Retail.
Soups & Broths (HS 2104)	N/A	1,150 MT \$2.5 million	-5%	0%	<ul style="list-style-type: none"> - Strong local competition. 	<ul style="list-style-type: none"> - United States is the largest supplier in this category holding 38 percent of import market share. - Convenience store sector is growing.

Sauces (HS 2103)	N/A	7,350 MT \$17 million	57%	0%	- Strong local competition.	- United States imports are projected to grow 12% in 2017 the U.S. is the top import supplier in this category, holding 31% of import market share.
Nuts and almonds (HS 0802)	N/A	1,400 MT \$11 million	26%	0%	- Chile is very competitive in almond and walnut production, holding a 37% of market share.	- Importers recognize that the quality of U.S. nuts and almonds is better than competitors. - U.S. exports are expected to grow 18% in 2017. The U.S became the largest supplier, holding 62% of import market share.
Wine (HS 2204)	50 million liters	8 million liters \$26 million	1%	0%	- Argentina (40% market share), Chile (29% market share), and Spain (15% market share). - Niche market for U.S. wines.	- Niche market for quality wines. - Peru's wine consumption is growing to 1.5 liters / person. - HRI sector is growing and demanding high value products.

Agricultural Imports Statistics (Values in Millions of dollars)

Product	2012	2013	2014	2015	2016
Bulk Total	218	429	816	576	688
Corn	-	52	477	302	452
Wheat	71	206	165	88	89
Cotton	127	128	130	96	66
Soybeans	1	23	20	60	57
Pulses	18	19	18	21	20
Rice	1	1	5	7	3
Other Bulk Commodities	-	1	1	1	1
Oilseeds (ex. soybean)	0	0	-	-	-

Coarse Grains (ex. corn)	0	0	-	0	0
Tobacco	-	-	-	0	0
Intermediate Total	144	77	157	262	227
Soybean Meal	55	2	6	84	108
Other Intermediate Products	26	26	34	34	35
Soybean Oil	-	-	57	91	32
Feeds & Fodders NESOI	17	17	24	28	21
Planting Seeds	8	8	9	10	11
Sugar, Sweeteners, Bev. Bases	7	5	6	7	7
Vegetable Oils (ex. soybean)	3	4	8	6	5
Distillers Grains	3	5	9	-	4
Live Animals	8	5	4	2	3
Animal Fats	17	5	-	-	1
Hay	0	0	-	-	-
Hides & Skins	-	-	-	0	0
Agricultural Related Products	106	123	74	77	112
Ethanol (non-bev.)	81	81	42	57	76
Biodiesel & Blends > B30	1	21	9	1	21
Forest Products	18	17	17	14	10
Fish Products	4	2	3	2	3
Distilled Spirits	1	2	2	3	2
TOTAL	467	629	1,046	915	1,027

VI. 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 (AMCHAM) – 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: Jose M. 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 (MINAGRI) – Minister: Mr. Jose Manuel Hernandez

Address: Av. La Universidad N° 200 – La Molina

Phone: (511) 613-5800, Fax: (511) 711-3700, www.minag.gob.pe

Ministry of Foreign Trade and Tourism (MINCETUR)

Minister: Eduardo Ferreyros

Calle Uno Oeste 50-60, Urb. Corpac, San Isidro, Lima 27

Tel: (511) 513-6100, www.mincetur.gob.pe

Ministry of Environment

Minister: Elsa Galarza

Av. Javier Prado Oeste 1440, San Isidro, Lima 27.

Tel: (511) 611-6000, Fax: (511) 611-6000 Annex: 1634, www.minam.gob.pe

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: Luis Alfonso del Carpio.

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 Shiguiyama

Address: Av. Garcilazo de la Vega 1472 – Lima

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. Ivo Gagliufi

Address: Calle de la Prosa 138 - San Borja, Phone: (511) 224-7800, Fax: (511) 224-0348,

www.indecopi.gob.pe

Ministry of Production\National Fisheries Health Service (SANIPES)

Director: Ernesto Bustamante

Location: Carretera a Ventanilla Km. 5.2, Callao. Tel: (511) 715-0180

Surquillo Location: Domingo Orue 165, Piso 7, Surquillo. Tel: (511) 213-8570 www.sanipes.gob.pe

