

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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## Peru

### Exporter Guide

## Golden U.S. Food Export Opportunities in the Land of the Incas

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**Report Highlights:**

Despite Peru's slower economic growth forecast for 2015, the country still offers excellent opportunities for exporters of U.S. food and agricultural products. U.S. exports to Peru in calendar year (CY) 2014 (through September) are at \$832 million, up 36 percent compared to 2013 and are forecast to reach \$1 billion by year's end. The food processing industry (3,000 plus companies) is a dynamic sector of the economy, whose 2014 import demand for U.S. ingredients is set to grow five percent. Food service sales are estimated at \$8.7 billion in 2014, up seven percent compared to 2013. Best prospects reside in supplying high-end hotels and restaurants.

## **SECTION I: MARKET SUMMARY**

Despite economic growth slowing to 2.8 percent during the first eight months of 2014 (compared to average annual growth of 6.6 percent in 2010-13), accompanied by somewhat heightened political tension within the ruling Gana Peru party, President Ollanta Humala's administration will continue to maintain an orthodox policy stance towards fiscal and monetary policies. In the run up to the 2016 general elections, the administration is facing short-term challenges as a result of the sharp slowdown in economic growth. The Gana Peru party retains only 36 seats in the national congress, just one more than the main opposition party Fuerza Popular (Fujimorist party), after seven of its legislators split from the party in July 2014.

The consumer-oriented food product trade has benefitted significantly from the U.S.-Peru Trade Promotion Agreement (PTPA). U.S. consumer-oriented food exports to Peru in 2013 have grown to a record \$212 million (highest export level since calendar year – CY 1970), up by \$148 million or 232 percent compared to CY 2009 levels. U.S. exports in CY 2014 (January-September) at \$167 million are already up almost 10 percent compared to CY 2013 levels. With a market share of over 18 percent, the United States follows Chile as Peru's second largest supplier of consumer-oriented retail food products.

FAS Lima estimates import demand for U.S.-origin food processing ingredients growing about five percent through the end of CY 2014, slightly down from last year's growth of six percent. We estimate that there are some 3,000 plus companies engaged in food processing in Peru, with the 50 largest food processors reporting combined sales in CY 2013 of \$16 billion.

Food service sales reached \$8.1 billion in CY 2013 (latest full year data). We estimate that food service sales will reach \$8.7 billion in CY 2014, up seven percent or some \$600 million compared to 2013. FAS Lima sources comment that in 2014 restaurant sales of \$3.8 billion account for 44 percent of total food service sales. Fast food outlets follow with \$3.3 billion or 38 percent of total sales. Coffee shops, bars, and other independent outlets account for 18 percent of food service sales or \$1.8 billion. The sector is anticipated to grow by seven percent through 2018.

FAS Lima assumes that overall consumer demand for imported food and agricultural products in the short to medium-term will remain strong, driven by a growing middle class. Total retail food sales in 2013 reached \$20 billion, \$4 billion (20 percent) of which were in supermarket sales (up 10 percent compared to 2012). Roughly \$16 billion (or 80 percent) of all purchases occur within metropolitan Lima. Domestic consumption will benefit in the short- to medium-term from government stimulus measures aimed at boosting consumer spending and investor confidence. The national economy's heavy reliance on extractive mining, however, makes consumer and investor demand vulnerable to any prolonged price downswing for Peru's main export commodity (i.e., copper).

Although Lima accounts for one third of Peru's population of 30 million, 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 food 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)**

	2012 Actual	2013 Actual	2014 Estimate	2015 Forecast
Nominal GDP (\$ billions)	199.6	206.5	208.6	214.3
Real GDP Growth	5.9	5.7	2.8	4.5
Consumer Price Inflation	3.7	2.8	3.2	2.8
Imports of Goods and Services (\$ billions FOB)	\$41.1	\$42.2	\$40.2	\$39.2
Private Consumption (% real change)	6.1	5.3	4.3	4.5
Public Sector Consumption (% real change)	8.1	6.8	7.8	9.0
Exports of Goods and Services (\$ billions FOB)	\$46.3	\$42.1	\$36.4	\$39.7
Unemployment Rate	6.8	5.9	6.2	
Short-term Interest Rate (av; %)	19.2	18.2	15.7	15.8

Sources: Economist Intelligence Unit, Central Intelligence Agency, FAS Quito office research.

### General and Agricultural Export-Import Trade Situation

Exports of U.S. agricultural and related products to Peru in CY 2014 (January through September) are at \$832 million, up 36 percent compared to the same period in 2013. We are on track to reach the \$1 billion mark by the end of the year. Imports of U.S. corn at \$237 million in CY 2014 are at the highest export levels since at least CY 1970. Imports of U.S. cotton at \$107 million (up five percent) and soybean oil at \$37 million (up from three hundred thousand dollars) are going strong in 2014. Imports of U.S. wheat, at \$132 million, are down 35 percent compared to 2013.

U.S. imports of Peruvian agricultural and related products during January through September are at \$1.3 billion, up 30 percent compared to 2013. Imports of other fresh fruit are a record \$316 million (up 112 percent), coffee (unroasted) at \$114 million (up 19 percent), and shrimp at \$105 million (up 52 percent) are doing well. Imports of fresh vegetables at \$188 million (down six percent) are underperforming in CY 2014.

Bilateral agricultural trade in CY 2014 (January through September) is over \$2.1 billion, up \$528 million or 32.5 percent. We are running a \$500 million agricultural trade deficit with Peru, up some \$88 million or an increase of 21 percent compared to same period in 2013.

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 is at record highs. From 2009 to 2013, bilateral food and agricultural products trade jumped from \$1.4 billion to \$2.3 billion – a nearly 63 percent increase. From 2009 to 2013, U.S. exports of food and agricultural products to Peru jumped from \$530.3 million to \$851.7 million – nearly a 61 percent increase. Exports of U.S. consumer-oriented products at a record \$212 million in CY 2013 now account for 25 percent of U.S. food exports to Peru. Today U.S. consumer-oriented product exports at \$186 million are up almost seven percent compared to last year.

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.

Peru also provides preferential tariff treatment to fellow Andean Community of Nations (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 its fruit to sell in the market at lower, more competitive prices.

**Table 2: Advantages and Challenges Facing U.S. Food Product Exports to Peru**

Advantages	Challenges
<ul style="list-style-type: none"> <li>• 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.</li> <li>• Supermarkets are promoting increased demand for high-value food products.</li> <li>• Supermarket expansion is allowing for greater U.S. product exposure.</li> <li>• A growing middle class's recognition of U.S. food quality and culture.</li> <li>• Shipping proximity advantages for consumer-oriented products with growing demand (e.g., lower calorie ready-to-eat meals, frozen foods, and snacks).</li> </ul>	<ul style="list-style-type: none"> <li>• Short-term slowdown in economic growth.</li> <li>• Peruvians prefer meals that use fresh products.</li> <li>• The limited number of five-star hotels hinders U.S. product market penetration.</li> <li>• U.S. exporters need to tailor products and ingredients to local tastes and expectations.</li> <li>• Limited infrastructure and low quality service, discourages repeat tourist visits.</li> <li>• Significant presence of foreign competitors.</li> <li>• Acceptance of processed and frozen food is limited.</li> <li>• Lack of brand awareness among consumers.</li> <li>• Lower priced local food brands.</li> <li>• Local companies are adept at accurately tapping into consumer preferences.</li> <li>• Smuggling remains a concern.</li> <li>• Provincial supermarkets are supplied by Lima-based companies.</li> <li>• Government organized food promotion campaign called "Buy Peruvian."</li> </ul>

## **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 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 channel of distribution that will best fit the company's market strategy.
- Depending of the channel chosen, identify a strategic partner that will import the product.
- Obtain the sanitary registration either directly or through a local partner.
- Request import permits when required.
- Forward to the importer 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 General Environmental Health Bureau (DIGESA) is the counterpart to the Food and Drug Administration (FDA) regarding sanitary supervision and registration of food and beverages. The Ministry of Agriculture's National Agricultural Sanitary/Phyto-Sanitary Service (SENASA) is the counterpart of USDA's Animal and Plant Health Inspection Service (APHIS). The National Institute for the Defense of Competition and for the Protection of Intellectual Property (INDECOPI) is responsible for trademarks and labeling standards and controls.

### **General Import and Inspection Procedures**

In order 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. Imports will be directed to a green, orange, or red channel. Channel green permits

delivery of the product once duties are paid; channel orange requires review of the documentation; and channel red requires review of the documentation and a physical inspection.

### Food and Beverage Sanitary Registration

Registration is initiated by a SUNAT registered company, which must possess a tax identification number (RUC). DIGESA required information is loaded to the VUCE website (*Ventanilla Unica de Comercio Exterior*). Requirements include:

- a) Completion of the Simplified Trade System Form (SUCE - *Solicitud Unica de Comercio Exterior*) on the VUCE website.
- b) Physical-chemical and microbiological quality analyses issued by an authorized (Peruvian) quality control laboratory.
- c) A certificate-of-free sale (issued in the country of origin within the past year).
- d) Labeling information
- e) Compositional analysis (including nutritional properties) issued by an INDECOPI accredited laboratory.
- f) Payment of administrative procedures.

This procedure will take no more than seven working days if the information submitted is complete and meets DIGESA’s requirements. The Sanitary Registration is valid for five years from the date of issue and is renewable between seven and 60-working days prior to its expiration date.

### Certificates for Animals, Plants and Byproducts

Prior to product shipment, the importer must request a SENASA import permit. The exporter must provide the importer with an official country-of-origin sanitary/phyto-sanitary health certificate.

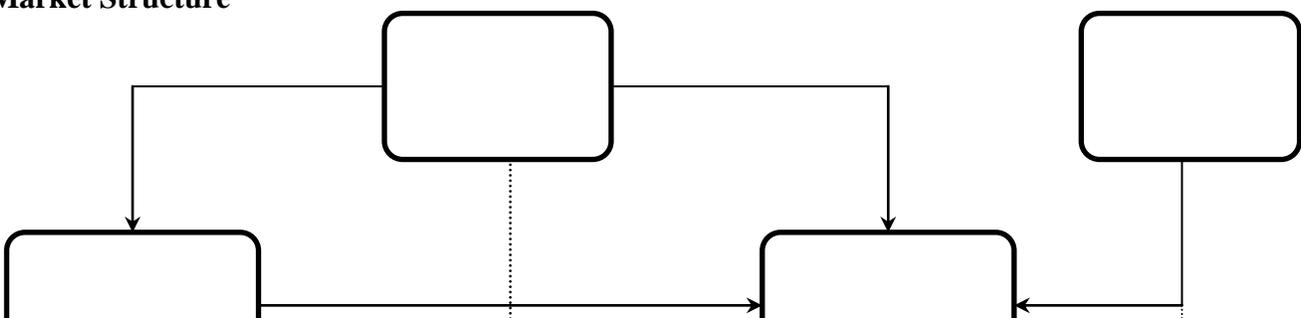
USDA’s APHIS issues health certificates sanitary/phyto-sanitary for animals, plants and their derived products. The Food Safety and Inspection Service (FSIS) will certify meat and its byproducts, while the Agricultural Marketing Service (AMS) issues certifications for U.S. dairy products.

### 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 28405](#) (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.

## 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**

Total retail food sales in 2013 reached \$20 billion, \$4 billion (20 percent) of which were in supermarket sales (up 10 percent compared to 2012). Roughly \$16 billion (or 80 percent) of all purchases occur within metropolitan Lima. Domestic consumption will benefit in the short- to medium-term from government stimulus measures aimed at boosting consumer spending and investor confidence.

The Peru's food retail market counts with 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.

The traditional channel includes corner stores (i.e., bodegas/small grocery stores) and open markets, which together account for 75 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 import demand for U.S. food processing ingredients growing five percent through the end of CY 2014, slightly down from last year's impressive growth of six percent. We estimate that there are some 3,000 plus Peruvian companies engaged in food processing, with the 50 largest food processors reporting combined sales CY 2013 sales of \$16 billion.

Among processed foods, bake goods remain the most important category. This category is estimated to reach \$3 billion in sales in CY 2014, up seven percent compared to the previous year. Dried processed food, along with oils and fats will grow five percent in CY 2014. Similarly biscuits and pasta are expected to grow this year by around eight and almost three percent respectively.

As modern supermarket retailers expand outside of Lima, new opportunities for U.S. food products increase. FAS Lima observes that modern retailers are increasingly promoting store-branded private label, especially in the interior of the country. Store-branded products account for 10 percent of total sales. Retailers are striving to hit the 30 percent total sales threshold within the next few years.

Domestic food manufacturers are also tailoring their product offerings to meet growing demand for healthier food products. Many are incorporating local ingredients such as Peruvian jungle fruits, local pepper varieties, and quinoa (an Andean grain) into their product lineups. Some manufacturers are increasingly producing product for distribution through vending machines.

## **HRI Food Service Sector**

Food service sales reached \$8.1 billion in CY 2013 (latest full year data). We estimate that food service sales will reach \$8.7 billion in CY 2014, up over seven percent or some \$600 million compared to 2013. FAS Lima sources comment that in 2014 restaurant sales of \$3.8 billion account for 44 percent of total food service sales, with fast food outlets accounting for \$3.3 billion or 38 percent of sales. Coffee shops, bars, and other independent outlets account for about 18 percent of total food service sales or about \$1.8 billion. The sector is anticipated to grow by seven percent through 2018.

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

FAS Lima sees growing demand for imported food products and ingredients. Imports have grown from \$3.2 billion in 2008 to \$4.4 billion in 2013. We attribute this growth to the combination of population growth and increased tourism. U.S. food products' competitive advantage resides in U.S. products' well-established reputation for quality, consistency, and practical use application.

## SECTION IV: BEST HIGH-VALUE PRODUCT PROSPECTS

### Best Consumer-Oriented Product Prospects

Product/ Product Category	2013 est. Market Size	2013 Imports	2008-13 Average Annual Import Growth	Import Tariff Rate	Key Constraints Over Market Development	Market Attractiveness for USA
Cheese (HS 0406)	21,531 MT	3,335 MT (\$16.3 million)	23 percent	040610, 040620, and 040640: 0 percent  040630 and 040690: 0	- Competitors: Argentina (18 percent) and Netherlands (9 percent). - 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. - In 2013, the United States was the main supplier with a market share of 44 percent (62 percent growth). - PTPA: 17 years linear;

				percent		2,500 MT quota with 12 percent increase per annum.
Confectionary – non chocolate (HS 1704)	N/A	15,647 MT (\$46.2 million)	16.6 percent	0 percent	- Competitors: Colombia (\$31 million) and Ecuador (\$3 million). - Strong local competition. Major owners are foreign companies.	- United States represents 2.5 percent of total imports. Total imports from the United States, however grew 57 percent in 2013.
Confectionary – chocolate (HS 1806)	N/A	4,073 MT (\$18.1 million)	22.2 percent	0 percent	- Chile is the major supplier (23 percent of MS). - Local industry is competitive.	- The U.S. is the second major supplier with 19 percent. The U.S. strength is in chocolate for the retail sector. Imports grew 46 percent in 2013.
Food Preparations (HS 210690)	N/A	14,339 MT (\$131 million)	16 percent	0 percent	- Local production is strong. ALICORP is the main competitor. Foreign companies are present in Peru. - Chile is the major supplier, 33 percent.	- United States is the second largest supplier and holds 18 percent of market share. - In 2013 imports grew 18 percent.
Prime and Choice Beef (HS 020230)	Total Beef and offal market: 283,596 MT	1,283 MT (\$7.3 million)	16 percent	0 percent	- Competition with quality beef cuts from Colombia, Argentina, Uruguay, Brazil, and Bolivia.	- Consumers' increased purchasing power is driving demand for high quality U.S. beef. - Imports from the United States grew 155 percent in 2013 compared to 2012.
Edible Beef Offal (liver) (HS 020622)	10,000 MT	3,924 MT (\$6.9 million)	26.3 percent	0 percent	Local production covers most of the market size.	- The United States holds 97 percent of import market. Imports grew 30 percent in 2013.
Fruit & Vegetable Juices (HS 2009)	N/A	14,299 hl (\$3.7 million)	30 percent	0 percent	- Brazil is the major supplier with a 2013 import market share of 38 percent.	Imports have grown 46 percent in respect to 2013.
Pet Foods (HS 230910)	45,000 MT	12,125 MT (\$14.9 million)	18 percent	0 percent	- Growing local pet industry. - Informal industry. - Major competitors: Colombia (37 percent) and Argentina (36 percent).	- The United States holds a 20 percent import market share.
Turkey (HS 020727)	13,000 MT	3,175 MT (\$6.5 million)	22 percent	5 percent	- Major exporters are Brazil (48 percent) and Chile (41 percent) followed by the United States with 11 percent. - Local poultry industry is strong.	- 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. - USAPEEC has initiated a market penetration plan.
Poultry Meat Cuts	98,000 MT	9,208 MT	54 percent	TRQ: 15,117	- Strong local competition.	- Peru is a major poultry consumer.

(HS 020714)		(\$8.6 million)		MT 0 percent	- Frozen presentation is not common	- TRQ: 6 percent increase per annum. Only 15 percent of TRQ is being utilized.
Bread, pastry, cookies (HS 1905)	N/A	3,841 MT (\$10.1 million)	21.percent	0 percent	- Colombia with a 32 percent import market share is the main supplier. - Strong local competition.	- United States holds 13 percent of import market share. HS 190590 represents 80 percent of total imports.
Soups & Broths (HS 2104)	N/A	1,353 MT (\$3.2 million)	21 percent	0 percent	- Strong local competition.	- United States grew 12 percent in 2013 and is the major import supplier in this category holding 33 percent of import market share
Sauces (HS 2103)	N/A	6,597 MT (\$12.7 million)	19 percent,	0 percent	- Strong local competition.	- United States grew 48 percent in 2013 and is the major import supplier in this category, holding 36 percent of import market share
Nuts and almonds (HS 0802)	N/A	479 MT (\$2.8 million)	46 percent	0 percent	- Chile is very competitive in almonds and walnuts production. Last year was major supplier holding 52 percent of market share.	- Importers recognize that U.S. quality of nuts and almonds is better than competitors.
Wine (HS 2204)	41 million liters	18.8 million liters (\$32 million)	17 percent	0 percent	- Argentina (44 percent), Chile (28 percent), and Spain (12 percent) are major exporters. - Only regular wine consumers recognize U.S. wine quality. - Small niche market for U.S. wines	- There is a niche market for quality wines for which the United States can be appreciated and price competitive. - Peru's wine consumption is growing. Right now is above 1.3 liters. - Import volume has grown 120 percent in respect 2012. However, value only grew 28. Low cost wines are gaining territory.

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](mailto:Aglima@usda.gov)

For additional information, see [www.fas.usda.gov](http://www.fas.usda.gov). See also to our [Food and Agricultural Import Regulations and Standards \(FAIRS\)](#), [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](http://www.amcham.org.pe)

National Society of Industries (SNI) – President: Luis Salazar Steiger  
 Address: Los Laureles 365, San Isidro - Lima 27  
 Phone: (511) 616-4444 • Fax: (511) 616-4433 • [www.sni.org.pe](http://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](mailto:ahora@ahora-peru.com) • [www.ahora-peru.com](http://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  
 Phone: (511) 613-5800 • Fax: (511) 711-3700 • [www.minag.gob.pe](http://www.minag.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](http://www.senasa.gob.pe)

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

Customs (SUNAT) – Superintendent: Mrs. Tania Quispe  
 Address: Av. Garcilazo de la Vega 1472 – Lima 1  
 Phone: (511) 315-3300 • Fax: (511) 315-3318 • [www.aduanet.gob.pe](http://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](http://www.indecopi.gob.pe)

### APPENDIX - STATISTICS

**Table A: Key Trade and Demographic Information**

Agricultural Imports From All Countries (\$Mil) / U.S. Market Share (%) 1/	\$4.3 billion/ 17%
Consumer Food Imports From All Countries (\$Mil) / U.S. Market Share	\$1.1 billion/ 18%

(%) <sup>1/</sup>	
Edible Fishery Imports From All Countries (\$Mil) / U.S. Market Share (%) <sup>1/</sup>	\$202 million/ 0.5%
Total Population (Millions) / Annual Growth Rate (%)	30.1 million/ 1.6%
Urban Population (Millions) / Annual Growth Rate (%)	23%/ 2%
Number of Major Metropolitan Areas	Eleven Metropolitan Areas Lima (Capital) 9.7 million
Size of the Middle Class (Millions) / Growth Rate (%)	6.9 million/ 3%
Per Capita Gross Domestic Product (U.S. Dollars)	\$11,624 PPP
Unemployment Rate (%)	7.6%
Per Capita Food Expenditures (U.S. Dollars)	\$3,211
Percent of Female Population Employed	44%
Exchange Rate	\$1:00 = S/. 2.90

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

**Table B: Consumer Food and Edible Fishery Product Imports**

Peru Imports (In Millions of Dollars)	Imports from the World			Imports from the U.S.			U.S. Market Share		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
<b>CONSUMER-ORIENTED AGRICULTURAL TOTAL</b>	860	1,069	1,141	129	176	206	15	16	18
Snack Foods (Excl. Nuts)	67	71	81	5	6	6	7	8	7
Breakfast Cereals & Pancake Mix	19	25	31	1	1	1	4	3	3
Red Meats, Fresh/Chilled/Frozen	55	61	68	15	20	28	28	32	41
Red Meats, Prepared/Preserved	7	7	7	1	1	1	13	13	14
Poultry Meat	25	37	47	5	10	13	20	27	27
Dairy Products (Excl. Cheese)	144	231	193	28	42	44	19	18	23
Cheese	16	18	23	7	9	10	44	48	42
Eggs & Products	2	2	2	1	2	2	75	91	94
Fresh Fruit	48	65	68	3	7	14	7	10	20
Fresh Vegetables	0	0	0	0	0	0	0	0	0
Processed Fruit & Vegetables	80	90	108	8	9	13	10	10	12
Fruit & Vegetable Juices	4	6	6	1	2	2	20	32	39
Tree Nuts	6	10	11	1	2	4	21	24	35
Wine & Beer	37	43	43	1	1	1	1	3	2
Nursery Products & Cut Flowers	9	12	14	1	2	2	7	17	13
Pet Foods (Dog & Cat Food)	15	19	23	3	5	6	20	24	26
Other Consumer-Oriented Products	328	371	416	49	59	62	15	16	15
<b>FISH &amp; SEAFOOD PRODUCTS</b>	134	140	202	5	3	1	4	2	0
Salmon	2	2	3	0	0	0	0	0	0
Surimi	0	0	0	0	0	0	0	0	0
Crustaceans	5	4	7	0	0	0	1	0	0
Groundfish & Flatfish	24	13	37	0	0	0	0	0	0
Molluscs	6	4	2	5	3	1	88	64	47
Other Fishery Products	98	116	153	0	0	0	0	0	0
<b>AGRICULTURAL PRODUCTS TOTAL</b>	4,097	4,425	4,375	875	572	757	21	13	17
<b>AGRICULTURAL, FISH &amp; FORESTRY TOTAL</b>	4,424	4,804	4,841	897	599	775	20	12	16

Source: World Trade Atlas (2014)

**Table C. Top 15 Suppliers of Consumer Foods and Edible Fishery Products (2013)**

Peru Top 15 Suppliers

CONSUMER - ORIENTED AGRICULTURAL IMPORTS

FISH SEAFOOD PRODUCTS

	\$1,000	2011	2012	2013		\$1,000	2011	2012	2013
Chile		212,654	234,003	248,283	Ecuador		51434.711	61804.737	69397.795
United States		129,219	176,195	206,176	Chile		24322.152	11987.922	37580.427
Colombia		86,641	83,625	93,803	Thailand		7418.972	6238.497	28297.023
Argentina		69,590	71,618	76,872	International Waters		8745.056	18405.288	13975.297
New Zealand		59,962	111,883	74,613	China		8721.657	9169.213	11751.087
Brazil		54,872	68,423	63,193	Vietnam		7672.734	11539.068	7251.844
Mexico		46,549	59,525	58,156	Indonesia		352.635	2429.89	5556.193
Bolivia		12,696	23,827	42,211	Argentina		7206.817	6052.905	5276.734
Spain		23,405	26,487	32,037	Venezuela		2428.634	0	4695.379
Netherlands		16,507	21,159	23,834	Senegal		0	220.486	3780.096
Denmark		8,163	11,328	19,238	India		0	625.59	3517.867
Ecuador		17,165	18,919	17,979	Panama		1124.973	385.942	2402.003
Italy		10,820	11,847	15,212	Ireland		0	0	2156.043
Ireland		13,076	14,861	14,760	New Zealand		4327.358	2957.534	1465.289
China		12,632	13,724	13,849	United States		5021.036	2935.53	973.941
Others		86,350	121,394	140,802	Others		4845.769	5339.869	4216.081
World		860,301	1,068,819	1,141,020	World		133622.501	140092.474	202293.098

Source: World Trade Atlas (2014)