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# For the tables of the world

New avenues for our  
organic products

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# PERUNATURA 2012

Small changes,  
big differences

PERUNATURA is the main commercial platform for the national and international promotion of products whose development is based on the principles of environmental, social and economic sustainability.

Companies from all over Peru involved in biocommerce, organic production and fair trade will present the best of their export range to thousands of buyers from Peru and overseas.

Visit us  
at Expoalimentaria  
**PERUNATURA** pavilion

• ——— Information:  
E-mail: [biocomercio@promperu.gob.pe](mailto:biocomercio@promperu.gob.pe)  
[www.perunatura.com.pe](http://www.perunatura.com.pe)



September is the month of Expoalimentaria, a trade fair organized by ADEX. PROMPERÚ will also be involved, with the aim of bringing Peruvian foods to the attention of the main international buyers.

This international trade fair is positioning itself as an excellent commercial space for the countries of South America, who will take advantage of the occasion to showcase their products to the more than 2,000 international buyers and at least 30,000 specialist visitors who will be attending the fair between the 19th and 21st of this month.

**Today our country is noted for the diversity of its fruits, vegetables and marine products as well as our Andean cereals and peppers. In addition, we offer adaptations of new varieties sourced from our rich biodiversity. All of this will be on show at PERÚNATURA 2012; a platform for the promotion of products developed using the principles of environmental, social and economic sustainability.**



Evidence of this new international positioning will be on show in February 2013, when Peru is invited to be the Guest Country of Honor at Fruit Logistica 2013 in Berlin, Germany. This is the most important trade fair for fresh products in the world.

Both Expoalimentaria in Lima and Fruit Logistica in Berlin will be testament to the progress being made in our export portfolio, which is competitive, high quality and inclusive and which demonstrates innovative globalisation strategies.

PROMPERÚ has been working in this area with the sector since 1996, providing technical assistance, specialist information and promotional tools. Nowadays we are committed to helping companies to take advantage of the important network of trade agreements at our disposal.

Peru is now the world's leading exporter of fresh asparagus and organic cocoa, second in organic coffee and avocados, third in organic bananas and sixth in fresh grapes. We are sure that in a very short time Peru will become the prime exporter of fruit and vegetables in the southern hemisphere.

**José Luis Silva Martinot**

*Minister of Foreign Trade and Tourism*

*President of the Board of Directors of PROMPERÚ*

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# Unveiling the Middle East

BY PAULA CARRIÓN

AT THE BEGINNING OF 2012 PERUVIAN FOOD EXPORTERS WERE INVOLVED IN A PROSPECTIVE TRADE MISSION TO DUBAI AND TOOK PART IN THE MOST IMPORTANT FOOD AND HOSPITALITY TRADE FAIR OF THE MIDDLE EAST, GULFOOD, WHICH WAS HELD IN DUBAI FROM 19 TO 22 FEBRUARY.

The United Arab Emirates (UAE) is a federation of states with more than 8 million inhabitants and a GDP of around 48 thousand dollars per capita. Dubai stands out within the region, having transformed itself into an important commercial hub with more than 1,800 services and logistics companies and re-export tallies that exceeded 2,000 million US dollars last year.

The UAE has over 435 supermarket and hypermarket chain stores, which make up 50% of the retail trade. Equally, the hotel, restaurant and catering trade is an important part of the equation, given that there are more than 400 hotels in the region, and 50% of what they buy is imported. In this respect it is worth noting that Dubai received more than 9 million tourists last year.

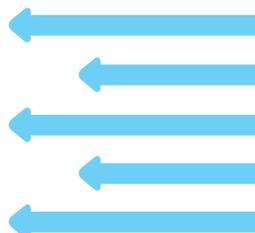
## Access regulations

The Unified Customs Law and Single Customs Tariff (UCL) of the Gulf Cooperation Council (GCC), which consists of Saudi Arabia, Bahrain, Qatar, Oman and Kuwait, established a unified customs tariff of 5% on almost all processed food products, while products such as fresh fruit and vegetables, some seafood, cereals, flour, spices and seeds for sowing are exempt from this law.

In the same way the law established the policy of a single entry point. This means that a product that enters any market member of the GCC will pay the appropriate tax only at the point of entry and then can be moved duty-free between the member countries of the GCC.

ESMA, the Emirates Authority for Standardization and Metrology, is the body responsible for the development or adoption of all standards.

The main focus was on the regulations governing labels, which need to be in both English and Arabic and contain the name of the product



EXPORTS TO THE UNITED ARAB EMIRATES HAVE RISEN BY AN AVERAGE RATE OF 33%, WITH THE COUNTRIES SHOWING THE HIGHEST GROWTH BEING ISRAEL (65%), JORDAN (51%), EGYPT (36%), BAHRAIN (34%) AND THE UNITED ARAB EMIRATES (33%).



and the brand as well as the date of production and the sell-by date. All the labels of imported products must be approved by and registered with the Dubai Municipality.

### Gulfood 2012

This trade fair is held each year in Dubai. The latest show brought together more than 110 country exhibitors, 3,800 company exhibitors and more than 68 thousand visitors from 152 countries. South America was represented by companies from Peru, Argentina, Brazil, Colombia and Chile.

The participation of the companies from Peru was organized by the Lima Chamber of Commerce, with the support of PROMPERU and the Commercial Office of Peru in Dubai. It was made up of nine companies hoping to win new business worth more than 3.5 million US dollars in the course of a year.

Among the products that generated the most interest were “chicha morada” and giant corn from Cuzco, sold as a snack. Overall the greatest demand was for evaporated milk, asparagus, artichokes, frozen squid and anchovies, while the tapenades, pestos and salsas also met with approval from well-known chefs and specialists.

The countries that showed the most interest in doing business with the Peruvian delegation were Saudi Arabia, Lebanon, UAE, Iran and Qatar as well as Turkey, Egypt and India.

The main challenges that arise in terms of offering products at competitive prices include the close proximity of Asian countries as suppliers of food to the UAE, as well as the direct connections that already exist with Brazil and Argentina, although shipments from the port of Callao can take between 37 and 60 days in transit (according to the Modern Freight Company, a logistics agency based within Jafza).

With the aim of ensuring that the main players in the chain recognize Peru as a food exporter, promotional activities need to be set in place to promote the range of Peruvian foods in the UAE, such as participating in trade fairs and trade missions, inviting importers to visit Peru, promoting tastings of Peruvian food in high class hotels and restaurants, establishing channels of communication with local marketers to inform them of the available range of fresh products, as well as publishing reports in specialist magazines.

Equally, it is important to take into account the fact that business relationships with Arab buyers will take time to establish. For that reason it is essential to develop and maintain periodic communication, which can be done during visits to trade fairs in the UAE, Peru or elsewhere as well as in business rounds and commercial visits.

# MEXICO, back on the radar

BY MARY OLIVARES

MEXICO IS THE SECOND LARGEST ECONOMY IN LATIN AMERICA, WITH THE LARGEST SPANISH-SPEAKING POPULATION (112 MILLION), A GROSS DOMESTIC PRODUCT OF 1.2 BILLION US DOLLARS AND AN ANNUAL PER CAPITA INCOME OF 14,610 US DOLLARS. A GREAT MARKET FOR PERU'S FOOD PRODUCTS.

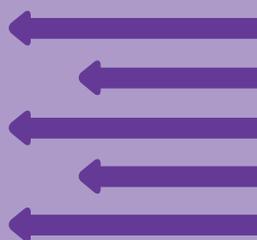


The favorable outlook generated by the economic recovery and the preferential tariffs awarded to 9,979 items within the framework of the Commercial Integration Agreement between Peru and Mexico, which came into effect on 1st February 2012, makes this economy an interesting destination for our food products.

The per capita food consumption in Mexico represents 23% of the total income and will grow by 20% in 2015, according to projections made by Euromonitor. At the same time, it projects that the sector will see an annual average growth of 4.7%. It is worth noting that according to official Mexican figures, food imports rose to 27,060 million US dollars in 2011, shared between agriculture and fishing (13,141 million US dollars), and purchases of agro-industrial products (13,919 million US dollars). These imports came primarily from the United States and Canada, with growth rates of 25% and 28% respectively. Uruguay, Costa Rica and Argentina were notable for increasing their sales by 43%, 42% and 38% respectively compared to 2010.

Among the food products in greatest demand were fruits (fresh and dried grapes, oranges, blackberries), vegetables (frozen mushrooms, olives, artichokes, peas, lentils, broad beans, chick peas and onions) and hydro-biological products (fish, squid and frozen prawns).

Peruvian exports to Mexico were helped by an increase in demand. In 2011, sales increased to 49 million US dollars (66.3% growth), with notable success for products such as whole paprika, frozen squid, dried whole peppers, fresh asparagus, powdered tara pods, canned red peppers etc. Given this situation it was possible to take advantage of commercial opportunities for zero rated products or those subject to a schedule of tariff relief (Table 1).



**TABLE N° 1: TARIFFS IN MEXICO**

\* Source: Confederation of Associations of Customs Agencies of Mexico - Xarget Access Map, Trade Map

ITEM	DESCRIPTION	DUTY TARIFF NMF	PERU	SUPPLIERS MARKET SHARE %
030429	Frozen fish fillets	20%	Tariff 0% in 10 years	China (45%), Vietnam (39%), Chile (13 %), Peru (0.1%)
080610	Fresh grapes	45%	Import tariff relief in 5 years Preferential tariff applies Nov - March	United States (64%), Chile (36%)
070310	Fresh onions	10%	Tariff 0% January - December	United States (100%)

In addition there were also opportunities for products of a “seasonal” nature (Table 2).

Mexican consumers want food in certain presentations. These include snacks, carbonated drinks, nectars and juices, processed and ready-to-cook cereals. The current trend is towards foods that are healthy, nutritious and balanced, generating a search for high quality products and a wide variety of vegetables. During the last trade mission Mexican importers signaled that while their links with Peruvian companies were still not strong, the import of Peruvian products was still a viable option, especially they were already being imported to the United States and Europe.

**RECOMMENDATIONS**

- Packaging, including pallets, must comply in full with the requirements of the transport company and the importer. The packaging costs must be included in the price of the goods.
- Payment must be made within thirty days in line with the terms of the Incoterm agreement.
- The supplier must affix the Universal Product Code (UPC) on all goods sold.
- The exporter, on signing the Supply Agreement, guarantees that he and all his subcontractors and suppliers will comply with all the local government regulations that apply in terms of minimum salary, overtime, living and working conditions, labor laws governing minors and all other labor and environmental laws that may apply.



**TABLE N° 2: IMPORT TARIFF RELIEF IN MEXICO**

\* Source: Peru Ministry of Foreign Trade and Tourism - Free Trade Agreement between Peru and Mexico

ITEM	PRODUCT	ACCESS	SEASONAL ACCESS	PREFERENTIAL ANNUAL QUOTA
070310	Onions	Yes		Annual tariff-free quota
080610	Grapes	Yes	Nou-Feb	-
071120	Olives	Yes	May-Sept	-
070320	Garlic	Yes	Nou-Jan	-
080520	Oranges	-	-	1,650 tons, increasing each year
080440	Auocados	-	-	8,000 tons
080300	Bananas	-	-	2,000 tons organic of the Cavendish variety

# FRUIT LOGISTICA 2013

## 6-8 FEBRUARY

Take part and register:

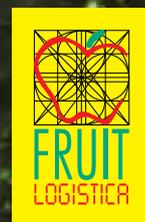
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# BRAZIL: the biggest market in the region

BY CRISTINA CAMACHO

THE BRAZILIAN MARKET REPRESENTS ENORMOUS GROWTH POTENTIAL. A MIDDLE CLASS WITH SPENDING POWER IS GENERATING BUSINESS OPPORTUNITIES FOR VARIOUS PERUVIAN PRODUCT LINES AND REGIONS.

Brazil is the largest market for food in Latin America and one of the most important in the world. In 2011, this country of 195 million inhabitants had a food consumption of 233,100 million US dollars, some 12% more than in 2010. According to specialist studies it will continue to grow in the next few years at an annual rate of 9%.

On the other hand, the per capita food consumption in Brazil was 1,185 US dollars last year, which is above average for the region formed by Argentina, Brazil, Chile, Colombia, Mexico, Peru and Venezuela (846 US dollars) and it is projected to increase by more than 40% between 2011 and 2016.

## Business opportunities in Brazil

Brazil imported 10,198 million US dollars of food in 2011, 23% more than the previous year. The Brazilian purchases of fresh, frozen and dried fruit amounted to 767 million US dollars; purchases of fresh, frozen and dried vegetables and root crops came to 615 million US dollars; processed fruits, vegetables and root crops came to 501 million US dollars; and fresh, frozen, smoked and processed fish and seafood amounted to 1,253 million US dollars, according to the World Trade Atlas.

Countries of South America such as Argentina, Uruguay, Chile and Paraguay have a strong presence in the Brazilian market. Last year they accounted for 39%, 9%, 6% and 4% respectively of the total Brazilian food imports, while Peru only represented 0.6% of the total sales (59 million US dollars).

However, it is important to bear in mind that Peruvian sales of this type of product to Brazil saw a sustained increase between 2005 and 2011, at an annual average rate of 25%. On the other hand, while Peruvian food exports to Brazil grew by 33% in 2011 compared to 2010, the four countries mentioned above only rose by 24%.

From 2012, as a result of the ECA 58 trade agreement signed between Peru and the Mercosur countries, no duty has to be paid on 6,524 Peruvian products on the Brazilian market.

The main products that have been driving up food exports are frozen mackerel, maracuya juice concentrate, frozen squid, tostadas, cocoa powder, garlic and grapes. In addition to these products, other foods worth noting are shipments of black and green olives in brine, canned horse mackerel, oregano, fresh and canned asparagus, frozen shark, canned artichokes etc.

With the aim of taking advantage of the important opportunities offered by the food market in Brazil, PromPerú went to Sao Paulo to interview a number of directors of distribution companies, wholesalers and retailers. These companies indicated that they may be interested in starting or increasing their purchases from our country of asparagus, artichokes, key limes, avocados, grapes, olives, quinoa, kiwicha,

snacks (broad beans, Cuzco giant corn, fried and sweetened), mandarins, tangelos, and fish products such as scallops, squid rings, frozen shark, canned horse mackerel and other fish (sea bass, grouper, mahi mahi and mackerel).

In a joint project between the public sector (PromPerú and the Commercial Office of Peru in Brazil) and the private sector (ADEX) last May twelve companies came together to take part in APAS (the Sao Paulo Association of Supermarkets), Brazil's most important trade fair for the food sector, where they exhibited agro-industrial products (onion, asparagus, artichokes, olives, garlic, quinoa) and fish (squid, scallops, hake and anchovies). At this trade fair the Peruvian companies managed to arrange 500 meetings with distributors, wholesalers and retailers which, according to projections extrapolated from the surveys carried out, will generate 6.5 million US dollars in sales in twelve months.

## COMMERCIAL CHANNELS IN BRAZIL

### Retail sales in modern formats<sup>1</sup>

The retail sales of foods in modern formats (supermarkets, hypermarkets and others) in Brazil rose by 11.3% in 2011, reaching approximately 120,000 million US dollars. Grupo Pão de Açúcar (a Brazilian distribution company), Carrefour and Wal-Mart are the main players, and together in 2011 they accounted for 22% of the turnover of foods in this type of establishment.

Sao Paulo is far and away the biggest market for this commercial channel. Last year it made up 35% of all sales, followed by other states in the Southeast of Brazil such as Rio de Janeiro (11%) and Minas Gerais (9%), as well as Rio Grande do Sul (7%) and Paraná (7%) in the south and Bahía (5%) in the north.

The retail companies mentioned import directly a quantity of the foods they sell. Each one of them can import goods worth over 180 million US dollars each year.

It is worth mentioning that the direct import of fresh and frozen fish products depends on having the necessary infrastructure in place to maintain the refrigeration chain. Currently some Brazilian retail outlets are fully equipped for this purpose and are buying their products direct from abroad. Others are in the process of installing the necessary equipment.

### Wholesale market

The wholesale market in Sao Paulo, CEAGESP<sup>2</sup>, is a group of 5,000 commercial companies selling fruit, vegetables, fish and flowers, among other products. It is the largest group in Latin America. In 2011 it traded over 4 million tons of goods, valued at 3,383 million US dollars. Of this total, 52% was from fruit, 26% from pulses, 7% from vegetables, 1% from fish and 2% from flowers.

<sup>1</sup> Study carried out by Nielsen and ABRAS (only looking at sales of foods in retail establishments). Interviews carried out with Brazilian trading companies.

<sup>2</sup> CEAGESP: Companhia de Entrepósitos e Armazéns Gerais de São Paulo.



# JAPAN: a demanding client to attract

BY JAVIER REBATTA

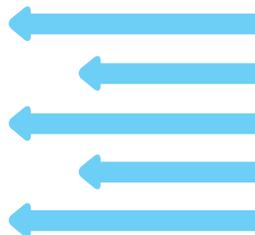
THE JAPANESE CONSUMER IS  
HAPPY TO TRY NEW FLAVORS  
AND PRODUCTS AND ALLOWS  
THE MOST IMPORTANT CUISINES  
OF THE WORLD A PRESENCE  
IN ITS MARKET.

Japanese food imports amounted to 48,600 million US dollars in 2011. In the first six months of the year the total registered was 24,700 million US dollars. This shows a growth rate of 22% and 6% respectively. This increase was associated with the need for a supply of foreign products as a result of food safety issues in the wake of the earthquake of March 2011.

The fishing sector led the demand for foods with 13,591 million US dollars, an increase of 16% in 2011. The main products imported were prawns and langoustines (2,208 million US dollars, an increase of 13%), supplied from Vietnam, Indonesia, Thailand and India, as well as frozen fish fillets (2,064 million US dollars, 37%) sourced from Chile, Norway and South Korea.

On the other hand, imports of fruit amounted to 2,993 million US dollars (a 10% increase). The product in highest demand is the banana, with an import value of 905 million US dollars, where Peru is the fourth largest supplier with a market share of less than 1%. The market leader here is the Philippines with a market share of 93%. Kiwis, grapefruit, shelled almonds, oranges, avocados and pineapples also feature in the Japanese shopping basket.

Purchases of vegetables amounted to 2,526 million US dollars, an increase of 17%. This sector is led by frozen vegetables and asparagus followed by onions, beans, bell peppers etc



## Peruvian exports

The non-traditional exports of Peru to Japan reached 134 million US dollars in 2011 (an increase of 52%), and are headed by the fishing and agriculture sectors. Marine products totaled 44 million US dollars and rose by 92%, while agricultural products reached 40 million US dollars (an increase of 48%). During the first five months of the year there was a reduction in fish (9%), although the growth in agriculture continues (28%).

The main Peruvian export products have been frozen and processed squid, frozen asparagus, fish roe, bananas, fresh asparagus, mangos and dried, chopped onions. On the other hand, the most important export regions have been Lima (27%), Ica (24%), Piura (17%) and La Libertad (13%) in terms of agro-industrial products and Piura (61%), Callao (11%), Tacna (10%) and Ica (8%) in terms of fish products. 222 companies from both sectors now export to Japan, of which 70% are from the interior of the country.

## Trends

The trend towards smaller families and the increase in life expectancy has also led to an increased consumption in foods that are healthy (low in calories and cholesterol), safe, high quality and organic.

According to Business Monitor, the main operators in the country are AEON, Seven & I Holdings, Daiei, Seiyu and Lawson. The large foreign operators, such as Wal-Mart, are limited in number due to the intense competition in the sector which is even leading to the exit of Tesco. Other players in the Japanese retail market are national stores like the chains of FamilyMart and Circle K Sunkus.

Japanese customers place a major emphasis on food safety but it is also necessary to comply with the high levels of consumer expectation. It is therefore important to guarantee the stability of supply and avoid price fluctuations. Equally great care must be taken when it comes to expiry dates on products.

SEA SHIPMENTS TAKE AT LEAST 23 DAYS TO REACH TOKYO FROM CALLAO. THE FREIGHT CHARGES FOR A 40-FOOT REFRIGERATED CONTAINER ARE VALUED AT APPROXIMATELY 5,000 US DOLLARS.

## JAPANESE IMPORT REGULATIONS

Check to see if the product requires any form of health certificate and if its import is permitted, in line with the Japanese Agricultural Standards (JAS), which dictate the specifications and standards for organic products of agricultural origin.

The importation of foods is monitored by the quarantine stations run by the Ministry of Health, Labor and Welfare at the entry points. The health inspection applies to all foods, as does the customs inspection.

The label must indicate in Japanese all the ingredients that form part of the product and their volume or quantity. The nutritional composition and calorie count, the origin of the products, the importer and the method of conservation (where applicable) are relevant for the consumer.



# PROMOTION TAKE A NEW DIRECTION

IN NOVEMBER DISCOVER YOUR NEW IDENTITY



# Native biodiversity: for the tables of the world

BY MÓNICA LOAYZA

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OUR COUNTRY OFFERS  
A WIDE RANGE OF  
NATURAL PRODUCTS.  
THE MAJORITY OF THESE  
RESULT FROM OUR  
BIOLOGICAL DIVERSITY.



Consumers of native products who comply with the principles of fair trade are aware that by buying these products they are helping to improve the living conditions of the producers and their communities.

The last publication issued by the organization Fairtrade International indicates that in 2011 global consumption of products that comply with the basic principles of social responsibility reached 5 billion US dollars, 12% more than in 2010. The largest markets were the United Kingdom, the USA, Germany, France and Switzerland. However, it is the newest markets that have shown the greatest dynamism, such as South Africa, which quadrupled its sales from 2010, reaching 7.2 million US dollars, or South Korea, where sales reached 17 million US dollars. Other markets that showed important increases were Spain, Japan, Norway, the Netherlands and Denmark, with variations above 20%.

A recent visit to Germany confirmed this trend. Almost all sales channels (cash & carry, boutiques, supermarkets, department stores and discount stores) carried various products with Fairtrade certification. According to the German Federation of the Organic Food Industry (or BÖWL, to give it its German acronym), despite the fact that these products are higher in price, approximately 30% more than conventional products, this is not a key factor at the point of purchase.

## PERÚNATURA 2012

**PERÚNATURA** is the main platform for the promotion of products whose development is based on the principles of environmental, social and economic sustainability: biocommerce, organic production and fair trade.

The idea of promoting **biocommerce** in Peru is to contribute to the sustainable economic development of rural zones in the country based on the appropriate use of the resources of biodiversity they offer, in the face of the market trends that demand this type of product.



This behavior is also reflected in the increase in Peruvian exports of such products over the last few years. Between 2007 and 2011 there was an average annual growth of 32%, going from 116 million US dollars to 354 million US dollars. Last year, products were exported to 103 markets, 10 more than in 2010, with the main destinations being the United States, Germany, Denmark, Brazil and Spain.

The native products most exported in the past year were cochineal, tara pods, Brazil nuts, quinoa and achiote, representing 91% of all exports.

The figures of 2011 show important increases in the prices of some native products compared with 2010. The main products in this category include camu camu, Brazil nuts and aguaymanto, all of which showed increases of more than 60% in their sale value. Despite the potential and the variety of uses that these products present, the majority of the exports were made in the form of ingredients (such as extracts, pulp, powder and bulk), which were then converted into final products with a higher value. This was the case with sachu inchi and camu camu, both of which are approved for use as oils, snacks or juices as well as functional foods, cosmetics and items of personal care.

The potential for development for other native Peruvian products is undeniable and even unsuspected. The successful experience of products such as camu camu and sachu inchi suggests that better uses will be found for these things in the future based on a greater understanding of all these products and their properties. The inclusion of such products on the international market requires exporters to know more about the tastes and preferences of the end consumer as well as new trends in consumption. The management of this type of information will enable the development of products with greater added value that satisfy the needs of the global market.

Finally, the number of products with a fair trade certification represents a clear competitive advantage, since for millions of people the purchase of this type of merchandise has become part of everyday life.

## BIOCOMMERCE PRODUCTS WITH THE BEST PRICE INCREASES

(THOUSAND US DOLLARS PER TON)

Source: Sunat. Compiled by: Market Intelligence - PROMPERÚ

ITEM	2010			2011			VARIATION PRICE REF.
	FOB	NET	PRICE REF.	FOB	NET	PRICE REF.	
Tara	43,230	26,952	2	41,141	19,614	2	31%
Brazil nuts	15,057	2,649	6	27,621	3,187	9	53%
Quinoa	13,609	4,887	3	24,493	7,617	3	15%
Purple maize	1,878	1,197	2	2,093	1,199	2	11%
Barbasco	1,095	246	4	1,893	360	5	18%
Sachu inchi	1,138	105	11	1,826	150	12	12%
Huito	67	3	22	1,108	32	35	54%
Camu camu	601	66	9	920	49	19	107%
Aguaymanto	151	14	11	740	53	14	33%



# Expoalimentaria: the best strategy for the Latin American food sector

BY BEATRIZ TUBINO  
EXPORT MANAGER - ADEX

EXPOALIMENTARIA IS  
ORGANIZED BY ADEX  
WITH THE VALUABLE  
SUPPORT OF PROMPERÚ,  
THE MINISTRY OF FOREIGN  
AFFAIRS AND THE MINISTRY  
OF AGRICULTURE.

## Peru is growing

In 2011, Peru was seen as the best country for investment in South America<sup>1</sup> and in 2012 the expectation is that its GDP will grow between 5.5% and 6% with private investment of 12.5% and an inflation rate of 2%<sup>2</sup>, given that the retail sector was one of the most dynamic between 1997 and 2009 with a growth rate of 400% (34 to 128 shops).

On the export front, our country traded 5,560 million US dollars of food products in 2011, of which 4,513 million US dollars were from the agricultural export sector, with an increase of 44%, and 1,047 million US dollars of fish for direct human consumption, with an increase of 63%.

Today, due to the global economic slowdown and the problems facing important continents, Latin America is seen as a strategic market. Expoalimentaria fits perfectly with this outlook.

## Breaking the mold

Bringing buyers to Peru - a few years ago just a small food supplier - broke the mold. The country only used to exhibit in overseas trade fairs such as Fruit Logística, PMA and SIAL. Not many people believed in the potential success of Expoalimentaria. Today, four years on, it is a similar size to Peru Moda and Peru Gift Show, the largest trade fairs to date. In the same year I headed the proposal that won the Entrepreneurial Creativity Award in the Sales and Marketing category, and we were finalists in two categories: Export and Food and Nutrition Products.

<sup>1</sup> Doing Business 2011

<sup>2</sup> World Economic Outlook, the Central Reserve Bank of Peru, Ministry of Economía y Finanzas

<sup>3</sup> EL Comercio newspaper.

<sup>4</sup> Business intelligence system ADEX DATA TRADE.

## Trade fair development

Compared with 2009 we have grown in all the indicators and the factor that would make the trade fair viable was its international character. The dream and the vision were to provide a showcase for the most important foods of Latin America and we are succeeding in that aim. Today it is even larger than SIAL Brazil.

## What can be found at Expoalimentaria?

Expoalimentaria is a professional meeting place for supply and demand as it presents a complete exhibition of agricultural, agro-industrial and fishery products as well as ingredients, equipment, machinery and packaging for the food processing industry and the hotel, restaurant and catering trade.

Expoalimentaria offers the visitor niche products aimed at a “boutique-style” segment, such as specialist organic coffees, mangos, canned papayas, mixed vegetable tapenades, asparagus pesto, organic chocolates filled with coconut or Amazonian liqueurs, dark chocolate with quinoa, king kong de maracuya (passion fruit filling), organic quinoa with added value, smoked or frozen trout, frozen paiche (dried and salted fish) and a wide range of regional and international foods, with pavilions from countries such as Mexico, Brazil, Ecuador, Colombia and Argentina etc.

For the first time the show will feature the “Salón del Café y Cacao” (coffee and cocoa bar) and the “Rincón de Granos Andinos” (Andean cereal corner) starring quinoa. This marks the start of our positioning strategy for 2013, declared by the FAO to be the “International Year of Quinoa”. There will also be the “Salón del Pisco”, “Peru Natura” (containing organic products) and the “Salón Gastronómico”.

## Satisfying the growing demand

Buyers from more than 50 countries will attend the show, with the main focus being on Latin America as well as North America, Europe and Asia. We will be visited by supermarkets HEB, Winn Dixie (USA), Loblaw (Canada), Emke Group (United Arab Emirates), Pão de Açúcar (Brazil) and major importers such as Goya, Atalanta, Roland, Sysco, Sunopta (USA), De Groot International (Netherlands) etc.

There will be also local buyers such as Cencosud, Supermercados Peruanos, Makro, Sodexho, Mayorsa, hotel chains, restaurants, self-service outlets etc.

## TABLE N°1: THE PROGRESSION OF EXPOALIMENTARIA

\* Estimated

CHARACTERISTICS	2009	2010	2011	2012*	VAR% 2012 / 2009
Area m <sup>2</sup>	6600	12000	18000	20500	211
National stands	195	301	382	442	127
International stands	10	99	130	150	1,400
Exhibiting countries	1	5	23	+ 20	1,900
National visitors	7850	19800	27273	30000	282
International visitors	450	740	1715	2000	344
Visiting countries			58	+ 50	+50
Business done in millions of US dollars	25	69.1	471.7	500	1,900

<sup>5</sup> Information from Consorcio Unión Tours - Perú Visión, tour operator for the fair.

## The fair that contains the best of each region

We have initiated a policy of promoting innovation and developing skills to encourage professional trade fair presentations, which is why we are offering the best from the regions. Each stand that we visit will help us to understand the biodiversity of products and the potential and innovation that we have in our country.

Our fair was present at Expoamazónica, Ucayali, where awards were presented to the company Marca Nativos with its Amazonian liqueur chocolates as the “Best Stand”, and to Industrias Mayo for its La Orquidea chocolates in the “Most Innovative Product” category, which will also be a competitor in the “3rd Innovation Contest” at Expoalimentaria.

## The other dimension: the impact on tourism

Expoalimentaria is a strategic tool for promoting our “country image”, as many of the visitors who come will enjoy tourist experiences in cities such as Lima, Cusco and Trujillo, positioning our country as an interesting place to do important business.

It is estimated that for Lima the fair will represent 8 thousand accommodation nights, 24 thousand lunches and dinners and more than 5 million US dollars destined to be spent on shopping and entertainment, while in the interior of the country there is likely to be over a thousand flights, 1,500 nights’ accommodation and more than 2 million US dollars spent on tourism, shopping and food and drink.

This fair is “made in Peru” and we should feel proud of it.



# FRUIT LOGISTICA 2013: Peru, guest of honor

BY WILLIAM ARTEAGA

FRUIT LOGISTICA IS THE MOST IMPORTANT TRADE FAIR FOR FRESH FRUIT AND VEGETABLES IN THE WORLD AND EACH YEAR BRINGS TOGETHER THE MOST REPRESENTATIVE ELEMENTS OF THE PRODUCTION AND MARKETING CHAIN: POST-HARVEST EQUIPMENT, DIRECT MARKETING, PACKAGING, DISTRIBUTION, COLD CHAIN, LOGISTICS SERVICES, CERTIFICATION, AND SPECIALIST PRESS ETC.

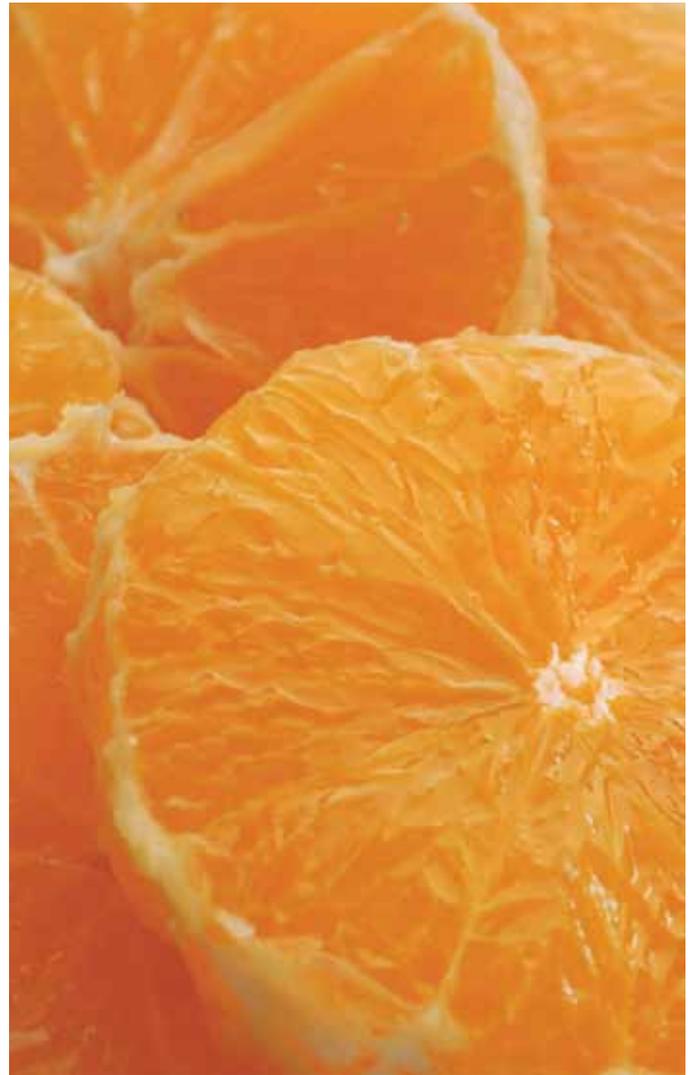
During the period 2000 to 2011 Peruvian exports of fresh fruit and vegetables increased from 101 million US dollars to 1,120 million US dollars, which represents an annual increase of 27%. At the same time Peru managed to double the number of destination markets for these products and in 2011 it reached a record figure of 102 markets. The European Union (42%) and North America (40%) are the main destination regions.

The development of the agricultural export sector has promoted the positioning of Peru as a global supplier of fruit and vegetables. It has become the main global exporter of fresh asparagus, the second biggest exporter of avocados, the fifth of organic bananas and the sixth largest global exporter of grapes. As a result Peru has converted itself into a new key player in the fresh produce industry and become a versatile supplier and a responsible partner capable of supplying products to the northern hemisphere in the off season.

As a result, Peru has been nominated as Guest of Honor or Partner Country at Fruit Logistica 2013 (Berlin, 06 - 08 February, 2013). This is the maximum status conferred by the organizers of this trade show on a country for its relevance within the sector and the quality of its products. It signifies a privileged position in terms of promotion and the leading role that it will play during the trade fair, which in turn will raise its media profile in areas that go beyond agro industry, such as tourism and investment.



IN 2012 THE PERU PAVILION HAD THE SUPPORT OF OVER A HUNDRED PERUVIAN BUSINESSES IN AN EXHIBITION SPACE MEASURING 315 M2 AND IT RECORDED POTENTIAL TRADE DEALS WORTH 43 MILLION US DOLLARS; AN INCREASE OF 15% OVER THE PREVIOUS YEAR.



This will be an excellent opportunity to demonstrate the diversity and capability of the Peruvian export range to the various international players and the specialist press, who all attend this major event. Fruit Logística is not just an opportunity to promote and highlight those star products of the Peruvian export range, such as asparagus, grapes, avocados, mangos and citrus fruits, but also those that have excellent growth potential, such as pomegranates, passion fruit, bananas, blueberries, physalis (Cape gooseberry) and chirimoya (Annona), which all originate from Peru.

Peru first took part in this show in 2003. That year, Peru was represented by four companies on a stand measuring 30 m2. In 2012 the Peru pavilion had the support of over a hundred Peruvian businesses in an exhibition space measuring 315 m2, and it recorded trade prospects worth 43 million US dollars, which represented an increase of 15% over the previous year. Among the range of Peruvian products on offer the ones that aroused the most interest among international buyers were the avocados, mandarins, tangelos, grapes, mangos, pomegranates, berries and sweet onions.

Fruit Logística covers 80,000 m2 of exhibition space, where 2,500 exhibitors receive more than 56,000 visitors from 139 countries.



# Lambayeque: exporting the taste of the north

BY KATHERINE CHUMPITAZ

IN THE NORTH OF PERU,  
ESPECIALLY IN LAMBAYEQUE,  
THE LIST OF EXPORT PRODUCTS  
HAS BEEN EXTREMELY WELL  
RECEIVED ON THE  
INTERNATIONAL MARKET

Lambayeque is noted for the export of its agricultural products. All the year round it produces sweet potatoes, pulses and lemons, as well as coffee, chilies, mangos and avocados.

In 2011 the food exports from the Lambayeque region totaled 419 million US dollars, which represents 6% of the total export value and an increase of 35% over the previous year. In total, 1.5 million US dollars came from hydro-biological products, 174 million US dollars from non-traditional agricultural products and 243 million US dollars from traditional agricultural products, mainly coffee (a 44% growth). During the first few months of 2012 export sales of foods amounted to 101 million US dollars, showing an increase over the previous period.

EXPORTS ARE SENT TO  
OVER 25 COUNTRIES.  
THE MAIN MARKETS ARE  
THE UNITED STATES,  
THE NETHERLANDS AND  
ECUADOR. COFFEE, BEANS,  
AVOCADOS AND PAPRIKA  
MADE UP 70% OF THE  
EXPORTS FROM  
THE REGION.



Eight products made up 78% of export sales during the first half of the year. Coffee (44 million US dollars) is exported to Germany, the United States and Ecuador. The Netherlands has been the main destination for shipments of maracuya juice (6 million US dollars), while canned green peppers and paprika were exported to the United States (4 million US dollars) and Belgium (1 million US dollars). Pickles based on chilies, peppers and jalapeños, exported mainly to the United States, Germany, the United Kingdom and Australia. The main destination for diced and cubed frozen mango was the United States (5.4 million US dollars), and this was also the case for beans (3 million US dollars). Avocados were exported to the Netherlands (2 million US dollars) and, once again, the United States (0.5 million US dollars).

The products that showed the most dynamism were frozen asparagus (386%), various frozen peppers (239%), maracuya pulp (55%) and fresh grapes (54%), whose main destination markets were the United Kingdom, the United States, Australia and the Russian Federation respectively.

Exports were sent to over 25 countries. The United States, the Netherlands and Ecuador are the main markets and make up 63% of the export total.

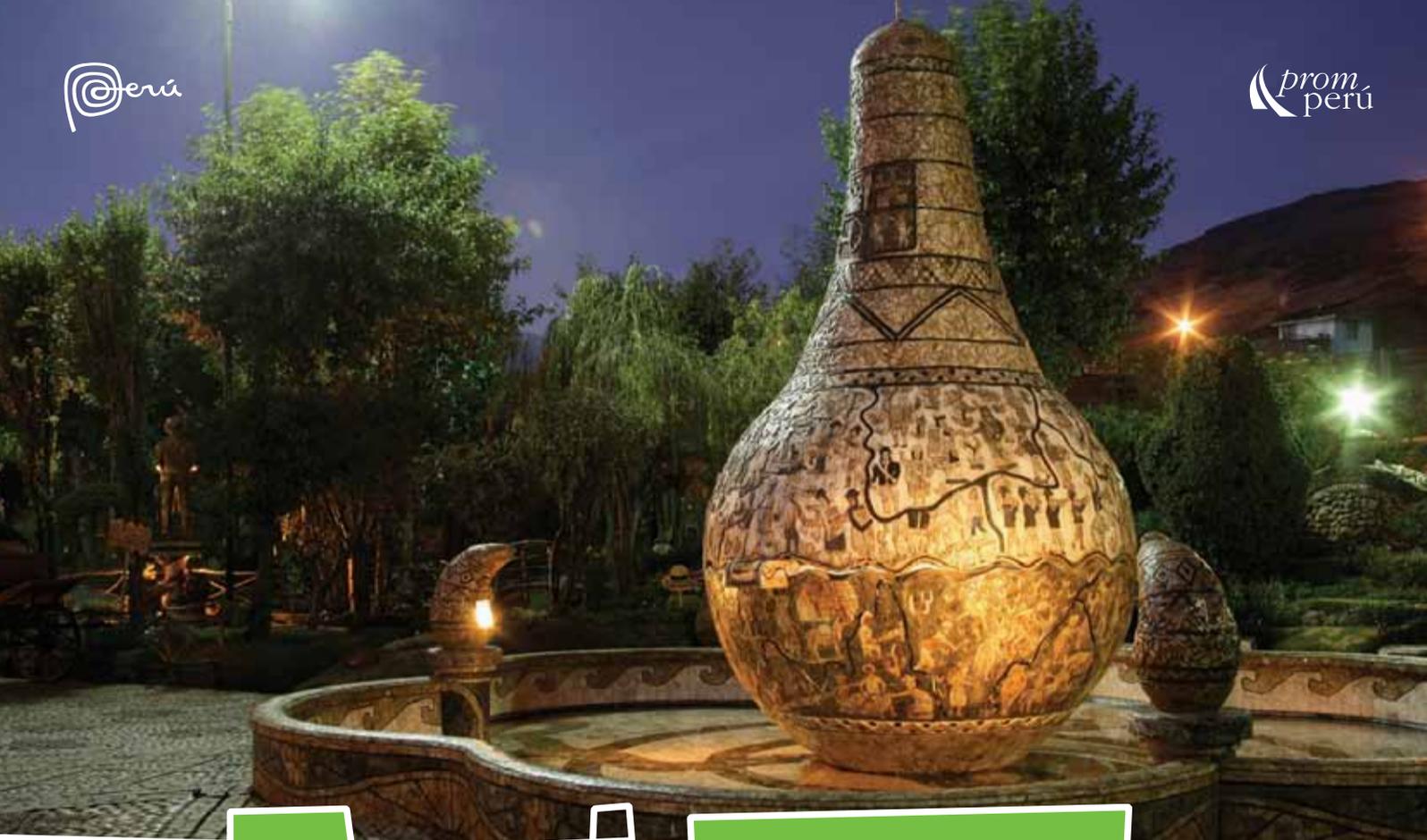
Export sales from the Lambayeque region go to various ports around the world. Shipments that leave from Paita take 16 days to arrive in Rotterdam, 8 days to reach New York and approximately 15 hours to get to Guayaquil.

## EXPOALIMENTARIA

This trade fair is an important showcase for the agricultural exports of the Lambayeque region. In 2011, seven export companies took part in Expoalimentaria exhibited presented the agro-industrial diversity in both fresh and processed products: Agrícola San Juan (grapes), King Kones Lambayecano y Llampayec, APIBOS (honey), PROASSA (feminine coffee), SOMFRUTAS (organic mango, maracuya and lemon) and the Asociación Marayhuaca (edible mushrooms). These did business worth over 1.5 million US dollars, were agreed as a result.

PromPerú, through its office for the Northwest Macro Region, offers technical assistance in packaging, corporate image, export costs, adaptation of products for the export market, rules of origin, optimization of exports through FTAs, market intelligence and logistics tools for exports. The objective is to guarantee the appropriate and active participation of companies in trade missions, business rounds and international and national trade fairs.

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Junín, Ayacucho, Huánuco, Huancaavelica and Pasco

Phone: (064) 20 3400



# Organic coffee and cocoa: the aromas of Peru

BY CARLOS VALDERRAMA

IN THE LAST FEW YEARS, FAIR TRADE AND ORGANIC CERTIFICATIONS HAVE BECOME MORE RELEVANT WITHIN THE MARKET, GIVING ADDED VALUE TO THE PRODUCTS. ORGANIC COFFEE AND COCOA ARE INCREASINGLY IN DEMAND.

Among the wide variety of certifications established to highlight production and manufacturing conditions there are some that are awarded to certify the functionality of a foodstuff, the specific use of a production system, the avoidance of certain ingredients, the production or location site for raw materials, the impact on the environment, the use of a restricted work force and a fair market price. The certifications can be obligatory or voluntary. The latter are associated with a company's ethics and social responsibility as well as its image, although these can also translate into higher sale prices.

The certifications most widely used in the production and marketing of cocoa and coffee offer guarantees to the purchaser and prestige to the seller, as they are deemed to have undergone an evaluation process. At the same time they ensure that the producer complies with organic production standards.

The organic certifications are USDA/NOP (United States), EU (European Union) and JAS (Japan). In Peru, the main certifying bodies for organic products are Bio Latina Perú, BCS ÖKO, Control Unión, IMO Control Latinoamericana Perú and OCIA Internacional Perú.

## Peruvian exports of organic cocoa and coffee

According to Fairtrade International, in 2011 global sales of organic cocoa (15% of the total amount sold of this product) reached 6,030 thousand tons. Sales of organic coffee (47% of the total amount sold of this product) came to 46,094 thousand tons. Even though Peru is registering positive rates of increase, its global market share is very low: it only supplied 0.5% of all the cocoa sold in the world in 2011, while in the case of coffee this figure was 0.6%.

Peruvian exports of conventional coffee have shown an important dynamism and totaled 1,594 million US dollars in 2011. Meanwhile the products that were certified as organic totaled 189 million US dollars. This represented 12% of the total exported, with a growth of 47%, greater than the rate of 26% which was the increase in total sales of coffee.

Sales of cocoa totaled 109 million US dollars, while sales of organic cocoa brought in 37 million US dollars. This means that there was an increase of 54%, a higher rate than that registered for total sales (28%).

In 2011, the United States, the Netherlands, Belgium and Colombia were the main destinations for organic Peruvian coffee and made up 57% of the total. In the case of organic coffee, Germany, the United States and Belgium were the main markets and took 70% of the total exports.

Due to the global economic slowdown, in the first six months of 2012 Peruvian exports of both products saw a drop of 8.8% and 22.8% respectively, as families are prioritizing their spending and demanding conventional products at a lower price.

### Beneficial certification

The differences in price between the organic and conventional formats of coffee and cocoa have recorded historic maximums. Even if the prices are purely referential - because the data does not specify the different certifications that a product can have - the price of certified organic beans is less quick to fall than that of conventional beans when there is a drop in demand. Guaranteeing a product as organic with a certification makes it possible to get the best long term profitability. This is because prices are higher and costs for fungicide or pesticide treatments are lower. In addition, the production process becomes more sustainable over time thanks to the promotion of the conservation of the ecosystem and the biodiversity.

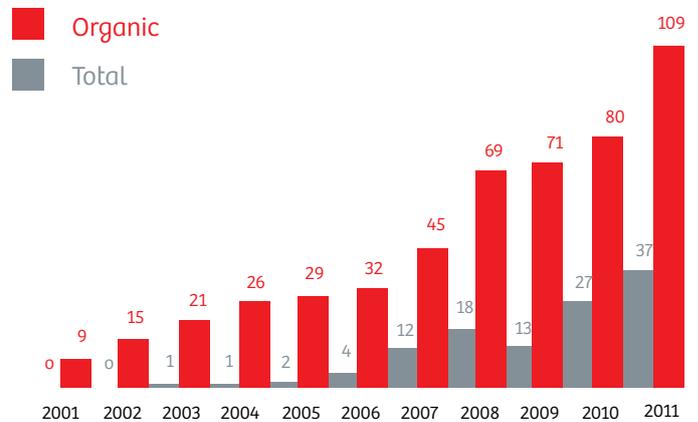
With the aim of reducing the costs of certification it is recommended that producers join together, given that the certifying companies work with areas of production. However, it is essential to set up an internal control system within these associations and to guarantee full compliance with all the requirements.

Within this framework, PromPerú offers support in training and assessment to various associations and companies with the aim of obtaining fair trade and organic certifications.

### PERUVIAN EXPORTS OF ORGANIC COCOA

US\$ MILL.

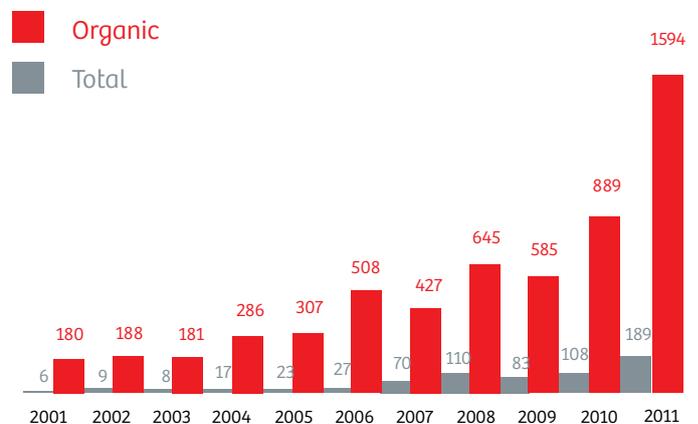
Source: SUNAT. Market Intelligence compiled by PromPerú



### PERUVIAN EXPORTS OF ORGANIC COFFEE

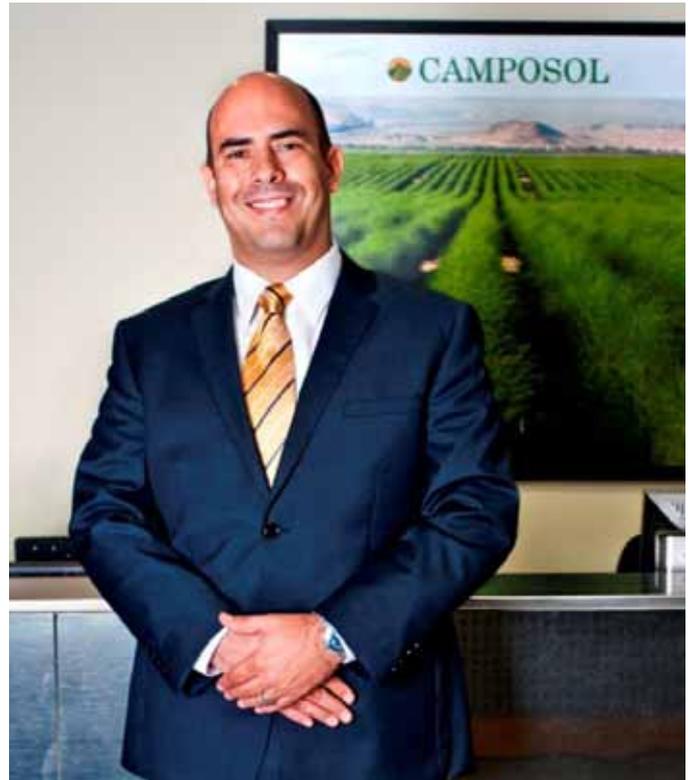
US\$ MILL.

Source: SUNAT. Market Intelligence compiled by PromPerú



JOSÉ ANTONIO GÓMEZ  
SALES DIRECTOR OF CAMPOSOL

# CAMPOSOL: Progress and innovation



CAMPOSOL, A LEADING COMPANY IN THE BUSINESS OF AGRICULTURAL EXPORTS WITH ADDED VALUE, HAS SUCCEEDED IN POSITIONING ITSELF IN VARIOUS MARKETS THANKS TO ITS COMMERCIAL VISION AND ITS STRONG COMMITMENT TO ITS AIMS.

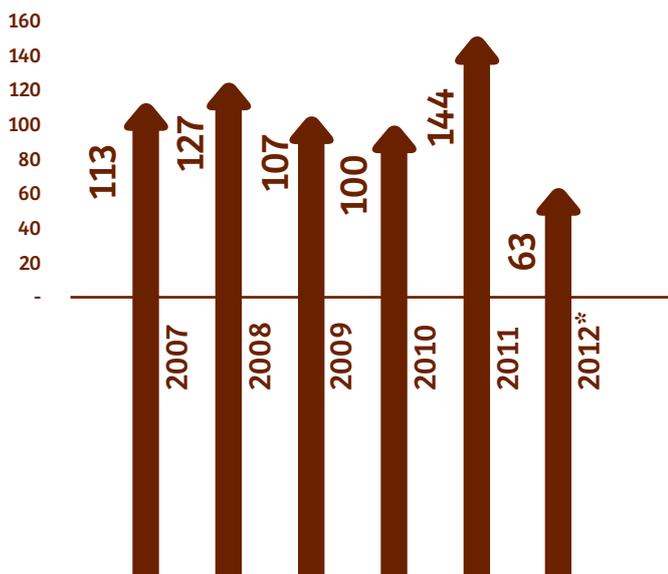
The current performance of the Peruvian agro-industrial sector is an example of good commercial management, efficiency and effective use of the country's terrain and microclimates. The steady growth of agricultural exports from Peru in important commercial centers is the result of the application of various strategies, which have led to diversification within the markets.

Camposol, which began operating in 1997, has become the leading company in the agro-industrial sector in Peru, with more than 25 thousand hectares of land in La Libertad and Piura. This is the result of having a vision and clear objectives and the constant improvement of its international management structure and production processes.

## CAMPOSOL: DEVELOPMENT OF EXPORTS

In millions of US\$

\* January - June 2012 Source: SUNAT. Compiled by: PROMPERÚ



The main strategy of the company is vertical integration, which gives it control from cultivation through to distribution in Europe and the United States, where it has the distribution centers Camposol Europa and Camposol Fresh, respectively. The company plans to set up a third distribution centre in Asia by the end of this year or the beginning of 2013, according to the Sales Director of Camposol, José Antonio Gómez: "The aim is to offer our range of products all the year round in order to maintain a steady supply to the aforementioned markets, through various suppliers at a global level".

The diversified product palette, with twelve different certifications, including HACCP, Kosher, BASC, etc., is a distinct advantage of Camposol, explained José Antonio Gómez. "All the products are monitored; they undergo special reviews and constant quality controls to ensure that the transit times and the shelf times do not lead to any deterioration of the products. In this way they compete on equal terms with global suppliers such as China (with white asparagus), Egypt and Spain (with artichokes) and Mexico (with peppers).

In the last five years the exports of Camposol have maintained an average growth rate of 6%. This means that in 2011 they amounted to 144 million US dollars, which represented an increase of 44% over the previous year. The products that help to explain this growth are canned asparagus (33 million US dollars, 19%), fresh avocados (30 million US dollars, 85%), red peppers (19 million US dollars, 17%), fresh asparagus (17 million US dollars, -4%) and fresh mango (12 million US dollars, 43%).

Despite the crisis that has affected various European markets, Spain continues to be the main destination for the exports of Camposol, which totaled 46 million US dollars in 2011 with a positive variation of 12%. Spain was followed by the United States (25 million US dollars, 118% growth), the Netherlands (24 million US dollars, -0.2%), Germany (15 million US dollars, 113%) and France (8 million US dollars, 42%). The products most in demand in the three main markets, which also benefit from an FTA or similar preferential terms, are red peppers, canned asparagus, mangos and fresh avocados.

However, markets such as Chile, Japan and Mexico, that have great potential from the point of view of Camposol, have pesticide restrictions on fresh avocados and citrus fruits, which are two of the company's main products.

José Antonio Gómez told us that even though the crisis has had an effect on sales in Europe, the company has been able to counterbalance this situation very quickly through market diversification. He explained that in 2011 the company exported to 47 markets, 12 more than the previous year. These include South Korea, Mexico, India, Hong Kong and the United Arab Emirates. In addition, Camposol managed to get the United States to lift their pesticide regulations on fresh avocados in 2010, in order to achieve sales of over 5 million US dollars in 2011.

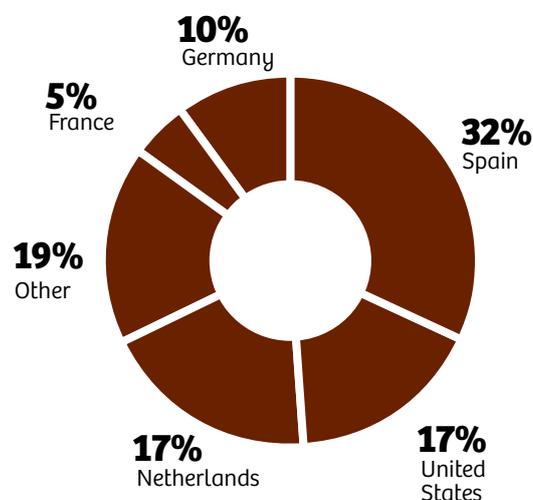
In the first six months of 2012 exports of Camposol totaled 63 million US dollars and went to 31 markets, 10 more than the same period in the previous year. The main market during this period was the United States (15 million US dollars), which made up 24% of the total value exported by the company. This was followed by the Netherlands (15 million US dollars, 24% participation), Spain (11 million US dollars, 18%), Germany (8 million US dollars, 12%) and Japan (3 million US dollars, 4%). Recently the company has entered the Ukrainian market with one of its most representative products: canned peppers.

Currently Camposol is focusing its efforts on research, development and innovation, the three pillars of international competitiveness. After more than 10 years in international markets, it has demonstrated that it can be at the vanguard of the global food industry.



### PRINCIPAL MARKETS 2011

Source : SUNAT. Compiled by: PROMPERÚ



### PORTFOLIO OF PRODUCTS

Fresh	Frozen
Green and white asparagus	Green and white asparagus
Mandarins	Prawns
Mangos	Mangos
Avocados	Avocados
Grapes	Red peppers

Canned
Artichoke
Green and white asparagus
Mangos
Red peppers



# SERVICES TO THE EXPORTER

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\* In order to offer a better service PROMPERÚ will ask companies to complete the EXPORTER TEST.

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# THE INTEROCEANIC HIGHWAY: moving closer to the northwest of Brazil

BY CAROL FLORES



THERE IS CURRENTLY A CONSIDERABLE LACK OF CLARITY REGARDING THE USE AND UTILIZATION OF THE INTEROCEANIC HIGHWAY. IN THIS ARTICLE WE PROVIDE KEY INFORMATION ABOUT THE PROCEDURES THAT MUST BE FOLLOWED.

## Checkpoints

When transporting cargo by land it is important to bear in mind that the last control point before crossing into Brazilian territory is the checkpoint of Iñapari (Puerto Maldonado, Madre de Dios). This marks the meeting point of various inspection bodies such as Immigration, the Peruvian National Police (PNP), Sunat, Customs and Peru's National Agricultural Health Service (Senasa).

The offices at the Iñapari checkpoint are open from 4.30pm. The best option for transportation companies is to arrange the export at the Customs Intendancy of Puerto Maldonado, located in the city of the same name three hours away from the checkpoint. Here the documentation and security issues are reviewed.

There are plans in the pipeline for 2014 to set up a Binational Border Centre (CEBAF) at the border crossing at Iñapari, which will incorporate all the control authorities under one modern, efficient infrastructure.

## Warehouse facilities

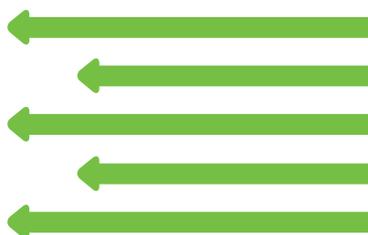
At present there are no suitable areas for carrying out cargo inspections at the border crossing; however frequent importers have had their own warehouses approved as a Primary Zones so that the relevant inspections can be carried out in better conditions.



PERU	OPENING TIMES	BRAZIL	OPENING TIMES
Immigration	7am - 7pm	Immigration	8am - 8pm
SENASA	8am - 6pm	MAPA	7am - 5pm
CUSTOMS (SUNAT)	24 hours <sup>1</sup>	Customs (Receita Brasileira)	24 hours
PNP	24 hours	POLICE	24 hours

<sup>1</sup> For export services it is recommended that you arrive after 4pm.

THE IMPORTER MUST PROVIDE CORRECT INFORMATION ON THE REQUIREMENTS THAT MAY BE DEMANDED BY THE CONTROL AUTHORITIES IN BRAZIL IN ORDER TO PREVENT PROBLEMS AT THE BORDER CROSSING.



### Crossing the border

Once the relevant permits and authorizations have been granted the transportation can continue on its journey to the border. The first point of contact in Brazil is the checkpoint of Assis, (20 minutes from Iñapari). The town of the same name and the international crossing point are located between these two points. Brazilian institutions such as Immigration, the Receita Federal (customs), and the Ministry of Agriculture, Livestock and Supply (MAPA) are all based here.

On the Brazilian side there is an adequate infrastructure for checking vehicles and there are designated areas for cargo inspections. It is also important to remember the change in time zones between the two countries.

In Assis, the customs office (Receita Federal) will only issue a transit permit to take the vehicle to Epitaciolandia, located one and a half hours from the control zone, where the cargo will be subjected to the relevant customs check.

For this reason if you require the participation of MAPA officials it is necessary to coordinate the presence of classification specialists.

### Road infrastructure

The tarmac of the Southern Interoceanic Corridor that runs between the cities of Puerto Maldonado and Assis is in perfect condition for international transportation. Assistance is provided by the permanent presence of the operator all along the route. The maximum speed permitted on the Puerto Maldonado – Assis stretch is seventy kilometers per hour.

### Importing products

The importer must provide correct information on the requirements that may be demanded by the control authorities in Brazil in order to prevent problems at the border crossing. In the case of perishable goods, Brazil demands compliance with health and classification requirements. In order to import products to this country the importer must be registered with Siscomex, (Sistema Integrado de Comercio Exterior).

The average time that a Peruvian product remains in a Brazilian port is between four and eight days.

### Transport

A Peruvian transportation company that wishes to transfer cargo to Brazil must have international authorization and have obtained original and supplementary permits. The former is arranged in Lima with the Ministry of Transport and Communications. Then the authorities in Brazil must issue a document of conformity and type-approval, which requires a counterpart in this country. This can then be used to obtain the supplementary permit.



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