

**Lateinamerika Verein e. V.
Trade between Europe and Perú by
Enrique Harten
Hamburg, 16.06.2010**



Perú

Fast Facts



Population	: 29.546.963 inhab. (2009)
Land Area	: 1.285.215 Sq Kms
Coastline	: 2.414 Kms
GDP per head 2009	: 4.356 USD
Real GDP Growth	: +9,8% (2008) +0,9% (2009) +6,0% (Q1-10)
Inflation Rate	: +6,65% (2008) +0,25% (2009) +1,04% (YTD 2010)
Current Account Bal.	: + 0,2% GDP (2009)
FTA Status	: USA, China, Chile, France, Germany, Italy

Perú

Commercial Balance



Commercial Balance April 2010

April reached a positive balance of USD 324 millions,
accumulated Jan-April USD 1.835 millions.

	2009		2010				Var. % de abril		Enero-Abril		
	Promedio mensual	Abr.	Ene.	Feb.	Mar.	Abr.	mensual	últimos 12 meses	2009	2010	Var. %
1. EXPORTACIONES	2 240	1 813	2 410	2 644	2 778	2 546	- 8,3	40,4	7 209	10 379	44,0
Productos tradicionales	1 714	1 371	1 898	2 095	2 187	1 961	- 10,3	43,1	5 303	8 141	53,5
Productos no tradicionales	513	429	495	531	569	562	- 1,3	30,9	1 865	2 156	15,6
Otros	13	13	18	18	22	24	5,5	76,5	41	81	97,1
2. IMPORTACIONES	1 751	1 674	2 074	1 873	2 375	2 222	- 6,4	32,8	6 557	8 544	30,3
Bienes de consumo	330	305	337	352	436	414	- 5,1	35,7	1 234	1 540	24,8
Insumos	840	787	1 058	930	1 173	1 151	- 1,9	46,3	2 859	4 311	50,8
Bienes de capital	571	571	639	580	751	634	- 15,6	10,9	2 420	2 603	7,6
Otros bienes	10	11	40	10	15	24	59,1	118,2	45	89	97,4
3. BALANZA COMERCIAL	489	139	336	771	403	324			652	1 835	

Source: BCRP – Banco Central de Reserva del Perú (Perú main national Bank)

Perú exports by segment



FOB Exports by Segments

		in USD Millions			Percentual Variation	
		2007	2008	2009	2008	2009
I.-	Traditional Products	21.464	23796	20571	10,9	-13,6
	Fisch Industry	1460	1791	1683	22,7	-6
	Fishmeal					
	Fishoil					
	Agriculture	460	685	633	48,8	-7,5
	Coffee					
	Sugar					
	Cotton					
	Others					
	Mining	17238	18657	16361	8,2	-12,3
	Gold					
	Copper					
	Zinc					
	Laed					
	Estano					
	Steel					
	Molibdenum					
	Silver					
	Others					
	Oil crude and derivades	2306	2663	1894	15,5	-28,9
II.-	No Traditional Products	6303	7543	6160	19,7	-18,3
	Agriculture					
	Textiles					
	Chemistry					
	Matelurgic and jewlery					
	Fishing					
	Metal Mechanics					
	Wood, paper and manufactures					
	Minerals no metals					
	Others					
III.-	Others	114	190	154	66,3	-19,3
IV.-	Total Exports	27882	31529	26885	13,1	-14,7

Perú, Commercial partners



CUADRO 19
COMERCIO POR PRINCIPALES PAÍSES 1/
(Estructura porcentual)

	Exportaciones 2/			Importaciones 3/			X + M		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
Estados Unidos	19,5	19,0	17,4	17,8	18,8	19,7	18,8	18,9	18,4
China	10,9	11,9	15,3	12,0	13,5	15,0	11,4	12,7	15,2
Suiza	8,4	10,9	14,9	0,5	0,4	0,6	5,1	5,9	8,6
Canadá	6,6	6,2	8,7	1,6	1,4	1,8	4,5	3,9	5,7
Japón	7,8	5,9	5,1	3,7	4,1	4,1	6,1	5,0	4,7
Brasil	3,4	2,9	1,9	9,1	8,1	7,6	5,7	5,3	4,4
Alemania	3,3	3,3	3,9	3,4	2,9	3,3	3,4	3,1	3,6
Chile	6,1	5,9	2,8	4,4	4,1	4,7	5,4	5,0	3,6
Ecuador	1,4	1,6	2,1	7,6	6,1	4,9	3,9	3,8	3,3
Colombia	2,2	2,2	2,4	4,8	4,3	4,3	3,3	3,2	3,3
Corea del Sur	3,2	1,8	2,8	2,5	2,5	2,9	2,9	2,1	2,8
España	3,5	3,3	2,8	1,4	1,4	1,4	2,7	2,4	2,2
Italia	2,9	3,0	2,3	1,8	2,4	1,8	2,5	2,7	2,1
México	1,0	1,0	0,9	4,2	4,1	3,4	2,3	2,4	2,0
Resto	19,7	21,2	16,8	25,4	25,9	24,4	22,0	23,4	20,1
TOTAL	100,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0

X: Exportaciones, M: Importaciones.

1/ Las importaciones fueron agrupadas por país de origen.

2/ Las exportaciones excluyen otros bienes vendidos y reparación de buques y aeronaves extranjeras.

3/ Las importaciones excluyen material de defensa, otros bienes comprados y la reparación de buques y aeronaves nacionales en el exterior.

Fuente: BCRP, SUNAT y Zofratacna.

Port Infrastructure



DP WORLD

Callao

In June 2006, DPWorld was awarded a 30-year concession to build and operate the new terminal. This Terminal started operations in May 2010 with the most modern technology and international certified security systems.

El “Muelle Sur” is the first investment in Perú. This very important project consist in the construction of 21.5 hec. of instalations of last generation which will include 650 metros of quay berth, 6 portic cranes post Panamax, 18 cranes RTG, etc.

This new terminal, will help the congestion recently experienced at Callao and increase the handling capacity up to app. 850,000 TEU per year. Main export/import access of the Peruvian Economy.

DP World Callao – “Muelle Sur” is part of DP World portfolio, International Leader in terminal operations, logistics, development and services related to the Shipping Industry.



 LIBRA

 CSAV

 CSAV NORASIA
LINER SERVICES



DP WORLD

Callao

Especificaciones del Puerto

Muelle	650 metros
Calado	16 metros en el amarradero
Patio de Contenedores	21.5 hectáreas con capacidad para almacenar 850,000 TEUs anuales
Capacidad para almacenar contenedores refrigerados	240 conectores + conectores móviles adicionales

Equipos de Patio

Grúas Post-Panamax	6
Grúas de Patio (RTGs)	18
Chassis y Trailers	30
Porta-Contenedores (Reach Stackers)	2
Porta-Contenedores de Vacíos (Empty Handlers)	2



Operaciones de Puerta

Carriles de entrada para contenedores	6
Carriles de salida para contenedores	4

Tecnología

Sistema operativo de Terminal	NAVIS Sparcs N4
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DP World Callao tiene planificada una "Fase II" del Muelle Sur en cuanto la demanda lo justifique. Esta ampliación incluirá adicionalmente 310 metros de atracadero, 3 grúas Post-Panamax y 9 grúas de patio.

Perú main Import Partners



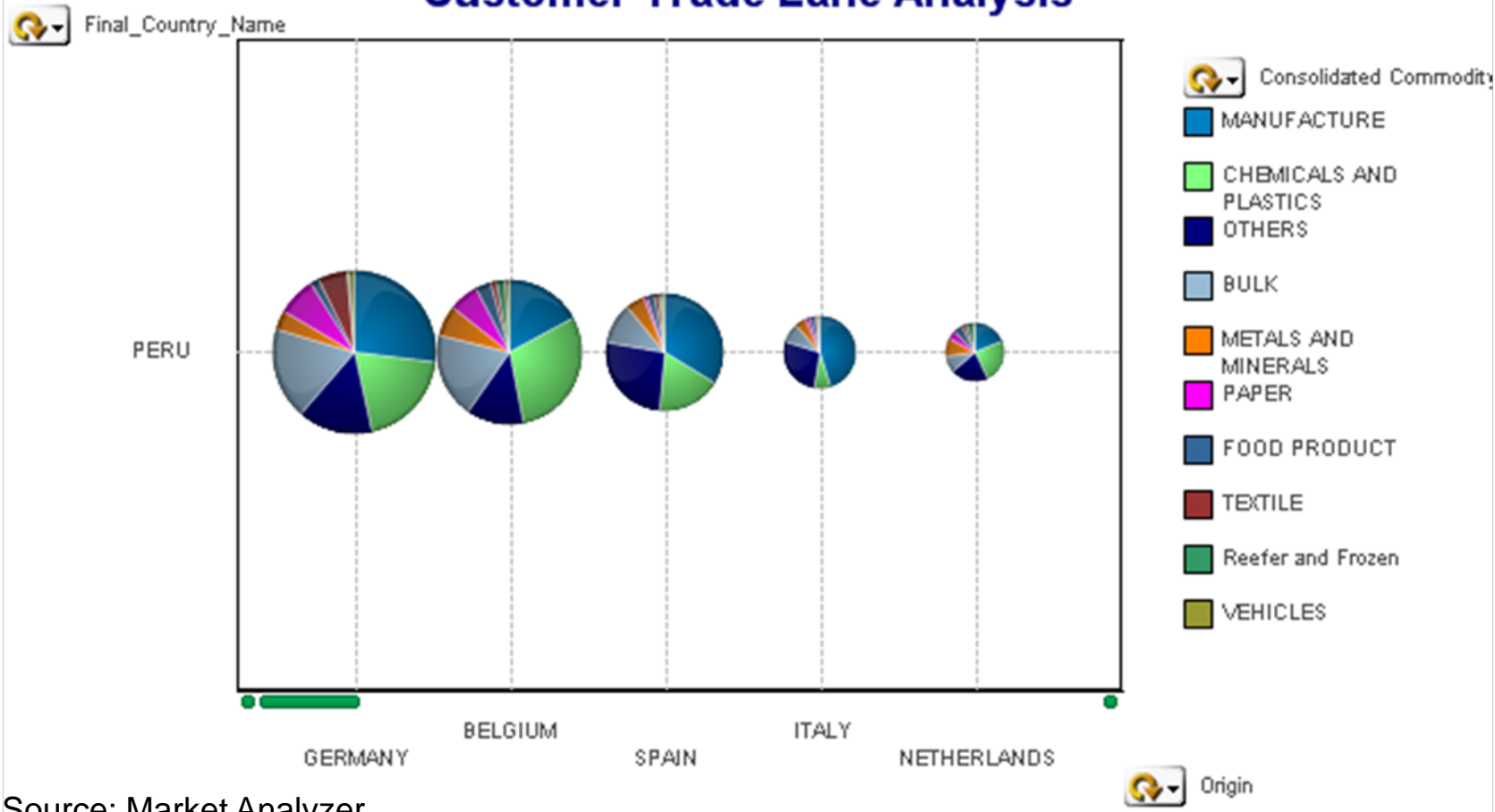
Origin_Country_Name	Final_Country_Name	TEUs	Individual	Accum.
TOTAL 2008 + 09		82.543		
GERMANY	PERU	19.937	24,15%	24,15%
BELGIUM	PERU	17.865	21,64%	45,80%
SPAIN	PERU	14.390	17,43%	63,23%
ITALY	PERU	8.766	10,62%	73,85%
NETHERLANDS	PERU	7.187	8,71%	82,56%
UNITED KINGDOM, UK	PERU	3.152	3,82%	86,38%
FRANCE	PERU	2.353	2,85%	89,23%
FINLAND	PERU	1.755	2,13%	91,35%
TURKEY	PERU	1.295	1,57%	92,92%
ISRAEL	PERU	740	0,90%	93,82%
OTHERS	PERU	5.103	6,18%	100,00%

Source: Market Analyzer 09/08

Perú main import Partners (Commodities)



Customer Trade Lane Analysis



Source: Market Analyzer

Peruvian exports to Europe



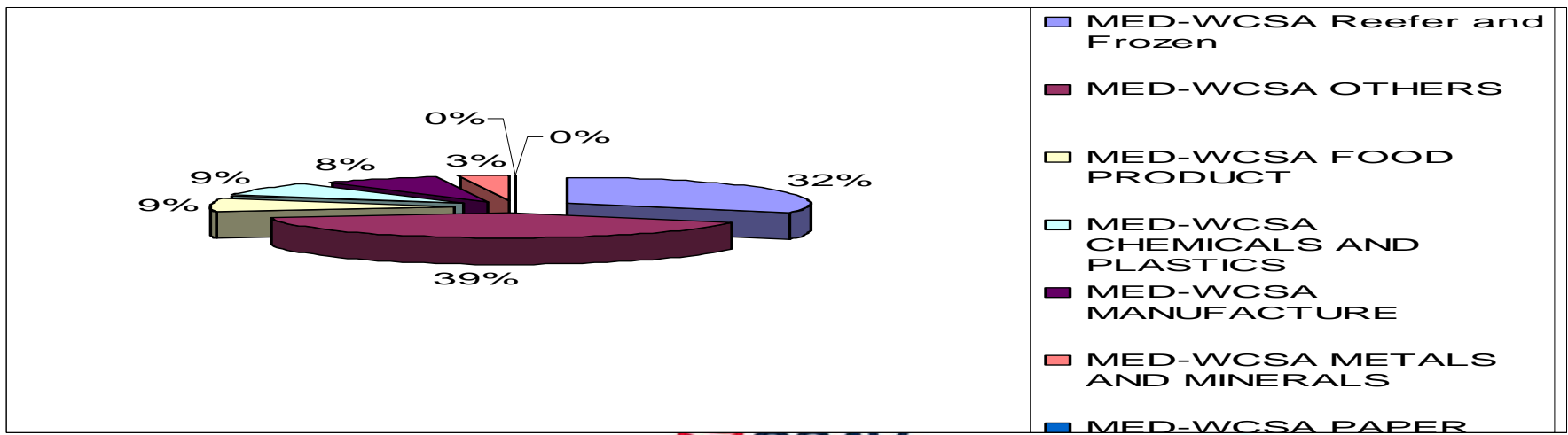
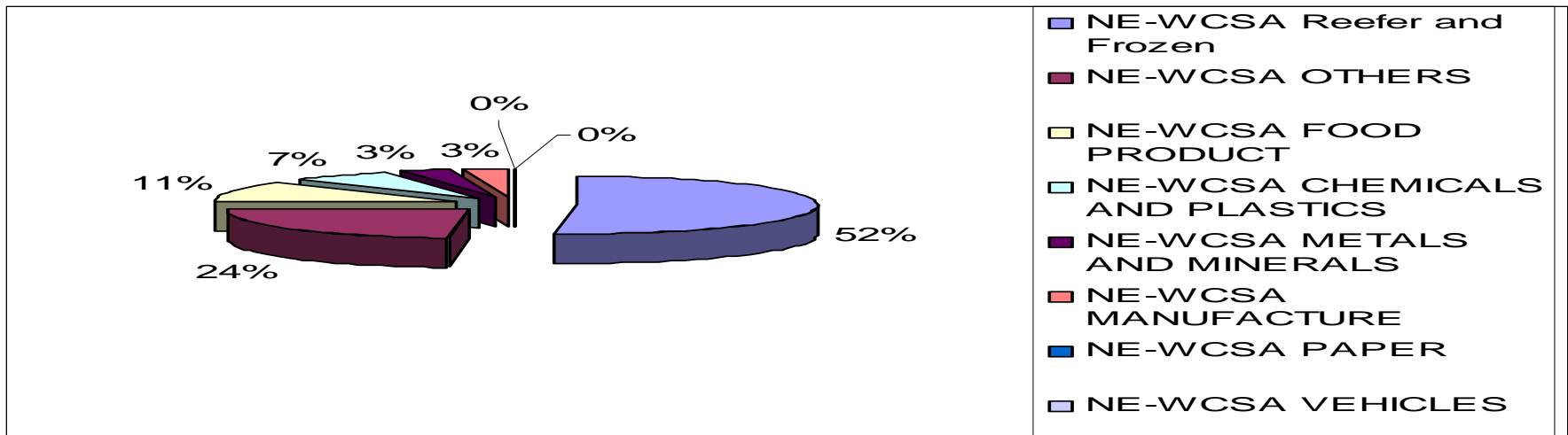
Traffic 2007	Market GC	Market R&F	Total Market		CSAV GC	CSAV R&F	Total CSAV	GC Mkt Share	R&F Mkt Share	Total Mkt Share
Mediterranean	11.368	5.027	16.393		2.178	197	2.375	19%	4%	14%
North Europe	22.280	21.340	43.620		4.069	5.643	9.712	18%	26%	22%
	33.646	26.367	60.013		6.247	5.840	12.087	19%	22%	20%

Traffic 2008	Market GC	Market R&F	Total Market		CSAV GC	CSAV R&F	Total CSAV	GC Mkt Share	R&F Mkt Share	Total Mkt Share
Mediterranean	10.665	5.338	16.003		2.240	476	2.716	21%	9%	17%
North Europe	24.149	24.799	48.948		4.792	7.568	12.360	20%	31%	25%
	34.814	30.137	64.951	8,23%	7.032	8.044	15.076	20%	27%	23%

Traffic 2009	Market GC	Market R&F	Total Market		CSAV GC	CSAV R&F	Total CSAV	GC Mkt Share	R&F Mkt Share	Total Mkt Share
Mediterranean	7.502	2.896	10.398		1.647	211	1.858	22%	7%	18%
North Europe	17.910	10.870	28.780		3.542	3.430	6.972	20%	32%	24%
	25.412	13.766	39.178	-39,68%	5.189	3.641	8.830	20%	26%	23%

Cargo Type	General Cargo	General Cargo	Reefer & Frozen	Reefer & Frozen		
Carrier	Vol Expo Teus	Market Share	Vol Expo Teus	Market Share	Vol Expo Teus	Market Share
APL	854	1%	1.690	2%	2.544	2%
CCNI	4.207	4%	736	1%	4.943	3%
CMA / CGM	6.536	7%	2.057	3%	8.593	5%
CSAV	18.468	20%	17.525	25%	35.993	22%
EVERGREEN	3.032	3%	1.535	2%	4.567	3%
HAPAG LLOYD & CP SHIPS	10.896	11%	6.748	10%	17.444	11%
HSUD	12.996	14%	7.004	10%	20.000	12%
KKK	525	1%	34	0%	559	0%
MAERSK	9.467	10%	25.837	36%	35.104	21%
MARUBA	4	0%	24	0%	28	0%
MSC	26.152	28%	6.181	9%	32.333	20%
NYK	15	0%	186	0%	201	0%
OTROS	912	1%	911	1%	1.823	1%
SEABOARD	8	0%	2	0%	10	0%
	93.872	100%	70.270	100%	164.142	100%

Peru Trade Export Commodity Mix to North Europe and Mediterranean



Conclusions and opportunities



- Strong economic fundamentals and the adoption of sound macroeconomic policies are the main factor behind the strengths of the Peruvian economy.
- Perú optimistic business expectations would support rapid private investments growth this in the next years by about 8 to 10%.
- In spite of the slowdown, the employment continue to grow (1,3% in 2009), unlike in other countries.

Thank you!

