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Report Highlights:

Peru is an internationally recognized gastronomic hub with opportunities for imported complementary food products. Health restrictions eased during 2021 but the foodservice sector has yet to recover pandemic-related losses. The industry will also continue to adjust due to changes in consumer behavior. This report provides a road map for exporters wishing to enter the Peruvian foodservice market and how to understand the key distribution channels for foods and beverages destined for food service.

Market Fact Sheet: PERU

Executive Summary

Despite political upheaval and moderately high inflation during the past year, Peru's economy remains stable. Agriculture accounts for approximately five percent of Peru's GDP, but employs around 28 percent of the population. The U.S.-Peru Trade Promotion Agreement, which entered into force in February 2009, has increased bilateral trade of agricultural products from \$1.46 billion in 2009 to \$5.4 billion in 2022, an increase of 200 percent. The United States was the second largest agricultural product supplier to Peru in 2021, accounting for 14% of market share.

Imports of Consumer-Oriented Products



Peru's consumer-oriented imports from the world reached US\$ 1.9 billion in 2022. Peru offers good opportunities for U.S. exporters of consumer-oriented agricultural products, but there are some challenges. The successful introduction of new to market food products depends on knowledge of the market. Exporters should review Peru's food laws, packaging and labeling requirements, business practices, and rely on experienced distribution partners. Getting to know the potential importer and the local distribution system is crucial.

Food Processing Industry

Peru's food processing industry is a dynamic sector of the national economy. The food industry in Peru accounts for almost 28 percent of the industrial GDP and the gross value added reached \$8.6 billion by the end of 2022. Its growth is directly linked to the development of the food retail and food service sectors. Food product manufacturers source both domestic and imported product ingredients. Local processed food products cover 70 percent of the market demand.

Food Retail Industry

There are three main supermarket chains in Peru: Cencosud (Wong and Metro), Saga Fallabella (Tottus) and Supermercados Peruanos (Vivanda, Plaza Veja, Makro and Mass). The market includes 322 conventional supermarkets and superstores, with 196 in Lima, and close to 810 convenience stores. The sector is comprised of both conventional supermarkets and traditional channels, comprised of wet markets and independent stores. Different types of food appear to perform better in the two formats. Top products include snack foods, dairy, edible oils, confectionaries, bread, and cookies.

Quick Facts CY 2022

Imports Consumer-Oriented Products: \$1.9Bn

Top 10 food processing ingredients growth Peru

1. Wheat	6. Whey
2. Powdered Milk	7. Food Preparations
3. Mixtures of odoriferous subst.	8. Dextrines and Other Starches
4. Starch potato	9. Natural Milk constituents
5. Animal fats and vegetable oils	10. Hop Cones

Food Industry Gross Value Added: \$8.6 billion

Food Industry by Channels

1. Food Exports: \$14.3 billions
2. Food Imports: \$7.5 billions
3. Retail: \$23 billion
4. Food Service: \$8.5 billion
5. Wet market: \$18 billion

GDP/Population

Population (Millions): 33

GDP (Billions USD): 432

GDP Per-capita (USD): \$6,700

Top 10 Host Country Retailers

1. Supermercados Peruanos S.A.
2. Cencosud Retail Peru
3. Hipermercados Tottus S.A.

Strengths/Weakness – Opportunities/Challenge

Strengths	Weakness
Strong demand for consumer food products	Low penetration of modern food retail throughout the country.
Opportunities	Challenges
Growing middle class	Stiff competition from other countries.

Section I: Market Summary

In 2022, the normalization of the economy post Pandemic continues its growing trend but a slower pace. Peru's GDP grew 2.7 percent in 2022 based on the improvement of the sanitary situation with respect 2021 that made headway in sectors such as commerce and services growing 3.3 and 3.4 respectively.

The post-pandemic recovery is also hindered by high inflation, reaching 8.45 percent in 2022. Peru's HRI market was negatively impacted by not only demand-derived inflation, but also by disruptions in domestic and international supply chains, price spikes of raw commodities, and a volatile exchange rate with the U.S. dollar. These factors led to significant price increases for food products. Consequently, the foodservice sector had to raise prices due to higher costs of imported ingredient inputs and increased prices of local staple products like potatoes, eggs, vegetables, and bread. The price of imported goods also saw a 13.7 percent increase in 2022, as reported by the Peru's Central Bank (BCRP). According to the BCRP, a positive inflation report forecast 2023 inflation down to 2.2 percent driven by a lower dynamism of private consumption and contraction of private and public investment.

The Peruvian National Institute of Statistics (INEI) reported a continuous growth of the accommodation and restaurant sector during 2022 resulting in 23.2 percent increase with respect 2021. The ease of health related COVID restrictions as of March 2022 improved ease of movement in public and consumers began dining out with greater frequency. Furthermore, Peru's opening once again to international tourists generated a higher hotel occupancy directly improving the sector's performance. However, there is still a reported sales gap that would need to be closed before a full recovery to pre-pandemic sales. Different sources and contacts envision that this gap catching up with pre-pandemic sales finally may close in 2025.

This year, the hotel and restaurant sector grew 5.3 percent during the first half of 2023 compared with 2022, but still lower than 2019. Restaurant sector showed a favorable performance due to higher traffic of consumers at independent and chain restaurants of different categories such as fast-food chains, and more gastronomic events during this period. As the post-pandemic economic recovery was underway, however, the tourism and hotel sector were hit by nationwide social unrest from political protests, in addition to a climatic phenomenon, the Yaku cyclone.

Tourism had been a strong driver of the HRI sector since before the pandemic. However, the flow of international visitors has not reached pre-pandemic levels yet. According to the Ministry of Foreign Trade and Tourism (MINCETUR), almost 2.3 million international visitors arrived in Peru during 2022, 56 percent less than 2019, generating \$2.9 billion in revenues. The sector dropped to the fifth position in terms of importance as an income generator. The reduction of tourism had a collateral effect on the foodservice industry, as it makes up approximately 15 to 20 percent of total foreign tourist revenue.

The Government of Peru has implemented various mechanisms to support the foodservice and tourism sectors, such as *Reactiva Peru* and *Turismo Emprende*, among others. These mechanisms have benefited a wide range of foodservice businesses. To further boost tourism, MINCETUR developed a National Strategy that began in 2022 and will continue until 2025. The strategy includes financial support to strengthen areas such as transportation, information platforms, safety destinations, and specialized products. Another mechanism to boost the sector will be the promotion of MICE (meetings, incentives, conferences, and exhibitions) opportunities in business tourism. This initiative aims to bring

professionals from specific production and service sectors together in an enhanced hospitality setting. Lima has been recognized as the second most important city in the region for hosting such events by the International Congress and Convention Association. These events have direct impacts on the local economy with the daily expenses of event attendees averaging around \$1,000 per day per MINCETUR data.

MINCETUR’s strategy is also rooted in the culinary sector. Peru’s gastronomy has earned substantial acclaim as a cultural and gastronomic destination over the past decade and is consistently recognized as the “World’s Leading Culinary Destination” by the World Travel Awards since 2012 (excluding 2020). Moreover, ‘Latin America’s 50 Best Restaurants in 2022’ highlighted four Peruvian restaurants among the top ten.

Table 1: Advantages and Challenges of Peru’s HRI Sector.

Advantages	Challenges
<ul style="list-style-type: none"> • Recognition of U.S. food quality and an appreciation for U.S. culture • Food service products benefit from the PTPA with low or no tariffs. • Fast food chains are expanding the number of locales in Lima and its suburbs, as well as in major cities such as Arequipa, Trujillo, Chiclayo, and Piura • Peru is actively promoting tourism. • With culinary tastes increasing in sophistication, demand for high-quality food products is growing. • Strong foreign franchise investment interest in Peru’s HRI sector • Market opportunities for health food products • Peru is a world-renown culinary destination 	<ul style="list-style-type: none"> • Less favorable economic conditions continue to weigh on domestic economic activity, leading to a considerable short-term slowdown in growth. • Cultural misperception about the healthiness of frozen products • Peruvians prefer meals made using fresh products. • The limited number of five-star hotels hinders U.S. product market penetration. • U.S. exporters need to tailor products and ingredients to local tastes and expectations. • Limited infrastructure coupled with low quality service discourages tourists from staying longer or repeat visits. • Peru is opening its market to rival foreign food service product providers. • Stiff competition from the region and other countries through multiple trade agreements

Section II: Road Map for Market Entry

The HRI sector in Peru has steadily grown over the past 20 years driven by a growing economy, stronger middle-class, and a robust tourism sector. U.S. food products have a role in the Peru HRI sector and have a reputation for high quality, consistency of supplies, and the complementarity with Peruvian diets.

1. Entry Strategy

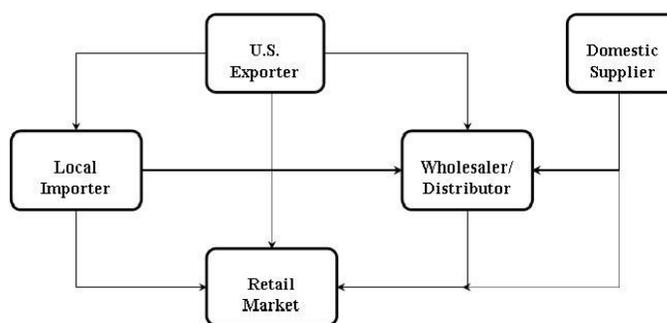
- Food service providers mainly rely on importers to source imported products.

- Determine if the product can be imported. Exporter must research food import regulations to facilitate the registration and import of food products and to minimize risk of detained shipments at port of entry (see, [FAIRS Country Report – Peru 2022](#)).
- Determine the product’s category and competitiveness with domestic and foreign alternatives.
- U.S. exporters can gain access to the Peruvian food service market through large importers, wholesalers/distributors, or specialized importers. Most food service companies buy imported goods from local intermediaries.
- It is recommended to hold initial virtual meetings and follow-up with travel to allow for face-to-face meetings with local partners. The import partner should be well known by the exporter before signing contractual agreements. Importers are responsible for facilitating customs clearance procedures.
- Exporters should provide support to food service customers by participating in technical seminars, product demonstrations, and local trade shows whenever possible.
- The import partner should be able to provide updated information on consumer trends, market developments, trade, and business practices.
- Contact [FAS Lima office](#) for trade facilitation and market assistance.

2. Market Structure

- Food service institutions largely source domestic food ingredients. Peruvians prefer locally produced, affordably priced, fresh food products.
- There are importers that look for foodservice presentations to complement their portfolio. Just a few are specialized in foodservice but also carry retail presentations.
- Food service businesses purchase through intermediaries.
- International franchises (e.g., KFC, Pizza Hut, Burger King, McDonalds, Starbucks, Chilis, Friday’s, etc.) and local fast-food chains import some of their food ingredients directly.
- Local and imported products are distributed directly to foodservice outlets or through sub-distributors, a practice common in secondary cities.
- Most of the HRI business is developed in Lima. High value products are sold in provinces through hotel or restaurant chains but a lower scale.

Graphic 1: Market Entry Circuit



3. Sub-Sector Profiles

a. Hotels and Resorts

The influx of international visitors in 2022 significantly boosted sales growing 46 percent with respect 2021. While nearly 4.5 million international tourists visited Peru in 2019, the number dropped to roughly 2 million 2022. This decline had a notable impact on restaurants, as food service accounts for up to 18 percent of total foreign tourist revenues.

The hotel occupancy rate in Peru also experienced improvement, driven by domestic tourists gradually resuming travel throughout 2022. Although the demand was primarily concentrated in Lima, hotel demand in specific provinces rebounded to almost pre-pandemic levels.

Peru boasts over 24,000 hotels with nearly half a million beds. Approximately 30 percent of these hotels are in Lima, and only 16 percent are categorized based on service and property type. More expensive restaurants and four- and five-star hotels serve high-value U.S. consumer-oriented products such as wines, cheese, beef, spices, condiments, and pork meat. The demand for U.S. food products and ingredients continue to benefit from the 2009 [U.S.-Peru Trade Promotion Agreement \(PTPA\)](#). Since the PTPA entered into force, U.S. agricultural and related product exports to Peru have experienced steady growth, reaching \$1.2 billion in calendar year 2022.

High-end hotels, specifically four- and five-star establishments, represent a niche market for U.S. food products. These hotels offer imported food products, with imported food and ingredients accounting for approximately 17 percent of the food served. It is worth noting that half of all Peruvian high-end hotels are in Lima. Hotels in Peru are actively developing strategic alliances with international chains and major investor groups. Beef, pork, wine, distilled spirits, and frozen products are potential categories for further development within this channel.

The pandemic has indeed halted new hotel investments. However, the government of Peru has implemented measures to boost infrastructure projects in the sector by introducing tax incentives. As per MINCETUR, 10 hotel chains have already initiated projects in Lima and Cusco, with a total investment of \$210 million in 2022, supported by the government. Furthermore, there are other projects that are currently on hold but are expected to resume operations by 2024, contributing an additional 6,000 beds to the existing infrastructure.

b. Restaurants

In early 2022, the government finally lifted all restrictions on restaurant traffic, allowing them to gradually resume operations. As a result, consumers returned to dining out and other in-person dining-type activities, which benefited the sector, leading to 21 percent growth in 2022. Additionally, government stimulus programs such as *Reactiva Per;* that provided liquidity to companies affected COVID 19 sanitary restrictions, have made significant progress in improving the sector. However, the sector still faced difficulties in fully recovering from the pandemic's impact, as well as dealing with rising inflation and exchange rates. To adapt to inflationary pressures, restaurants had to increase prices and, in some cases, reduce portion sizes.

Before the pandemic, restaurants were one of the fastest-growing sectors in the economy. This growth attributed to the better performance of specific segments, including fast food and stand-alone restaurants. High-end restaurants, casual dining eateries, coffee shops, and fast-food chains represent niche market opportunities for U.S. agrifood exporters. These establishments account for 15 to 25 percent of all imported food products. The most frequently imported food ingredients include sauces, meats, processed fruits and vegetables, cheeses, and specialty products such as beef, pork, wines, and spirits.

During the pandemic, restaurants adopted certain features that are still valid and are expected to become even more dynamic in the years to come. Stand-alone restaurants quickly adapted by implementing take-away services or enhancing their delivery systems, which helped them retain sales. The improvement of e-commerce channels and partnerships with delivery apps has been instrumental in increasing profitability. The booming of dark kitchens started right before pandemic and became a financially efficient business model during this time. Dark kitchens were instrumental in reaching a wider audience through delivery services operated by third-party specialized companies using mobile applications, among others.

The number of foodservice outlets In Peru has grown rapidly due to the expansion of shopping centers in Lima and other cities located in the provinces, where the cost of real estate is significantly lower than in Lima. Retail venues account for 40 percent of total foodservice sales. Although retail penetration in Peru is still low compared to other countries in the region, growth in this environment is expected to continue. Chained brands are focused on opening new outlets. While food franchise brands expressed interest in entering Peru, projects were put on hold due to the pandemic. However, the return of well-known U.S. brands, including Taco Bell, Little Caesars, and IHOP, presents promising areas for future growth. For instance, Subway managed to open three additional outlets last year, including a franchise outside of Lima, a clear demonstration of expanding economic opportunity.

Table 2: Peru, Restaurant Company Profiles (2022)

Company Name	Sales (\$million)	Brands	Location	Purchasing Agent
DELOSI	97	KFC, Starbucks, Pizza Hut, Burger King, Pinkberry, Chili's, Madam Tusan	Lima, Trujillo, Arequipa, Chiclayo, Huancayo, Cuzco, Ica, Piura, Cuzco, Pucallpa,	Direct Importer
NG Restaurants S.A.	59	Bembos, Chinawok, Don Belisario, Popeyes, Dunkin Donuts, Papa Johns	Lima, Trujillo, Arequipa, Chiclayo, Huancayo, Cuzco, Ica, Piura, Cuzco, Pucallpa,	Direct Importer
Franquicias Pardo SAC	34	Pardo's Chicken, Planet Chicken	Lima, Trujillo, Chiclayo, Piura, Cuzco, Chile	Local
McDonald's	26	McDonald's (fast food) – 54 outlets	Lima, Trujillo, Arequipa, Chiclayo, Huancayo, Cuzco, Ica, Piura, Cuzco, Pucallpa,	Direct Importer
Papa John's International	52	Papa John's	Lima, Callao, Trujillo, Piura, Chiclayo, Cuzco, Ica	Local
Grupo Norky's	123	115 outlets	Lima, Trujillo, Huancayo, Huanuco, Ica, Arequipa, Pucallpa, Puno, Piura, Chiclayo, Cajamarca,	Local
Grupo Roky's	56	97 outlets	Lima, Ica, Trujillo, Chiclayo, Piura	Local
Cinco Millas S.A.C.	14	Astrid & Gaston, Chicha, La Mar, Panchita, Tanta, Papachos, El Bodegon, Barra Chalaca, Los Valientes	Lima, Arequipa, Cuzco,	Local
Grupo	9	Pescados Capitaes, La	Lima	Local

Civitano		Nacional, Juicy Lucy, Chicken What, Cho, Santa Brasa, Burger Truck y Don Bife		
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Source: FAS Lima office research.

Despite the economic hardship, the booming Peruvian cuisine scene is also driving significant expansion of the high-end restaurant sector. Peru’s recognition as the World’s Leading Culinary Destination in 2022, in addition to the presence of four Peruvian restaurants in the list of Latin America’s 50 Best Restaurants in 2021, has been instrumental to become an option for food tourism in the region. In general, U.S. food and agricultural products are perceived to be of high quality and have found a niche market in high-end restaurants.

c. Institutional

The institutional sub-sector was aligned with wider sector’s improvement and boasted positive results in 2022 driven by a higher demand of different sectors such as: ground and air transportation, mining, electricity, construction, among others. As restrictions were eased, domestic tourism fueled the demand of food services of the transportation sector. In addition, the industrial sector closed new service contracts, with the mining sector the most important in terms of volume. Large caterers remain potential buyers of U.S. food products. These caterers supply a wide range of sectors throughout the country. SODEXO and APC Corporación S.A. are Peru’s largest industrial caterers.

Peruvian Government Programs: To address child malnutrition in low-income families, the Government of Peru sponsors programs aimed at improving nutritional standards for children attending public schools. [*Qaliwarmá*](#) is the national food assistance program that provides nutritionally balanced lunch supplements to approximately four million schoolchildren (ages 3 and up). The program is countrywide, reaching public schools in Peru’s cities all the way to indigenous communities in the Amazonian area. The *Qaliwarmá* program is a public-private initiative that is co-managed by the Ministry of Development and Social Inclusion and the private sector.

Section III: Competition

The Government of Peru (GOP) has encouraged integration into the global economy by signing several free trade agreements, including the United States - Peru Trade Promotion Agreement (PTPA), which entered into force in February 2009. The PTPA has been instrumental in boosting bilateral trade in food and agricultural products between the United States and Peru. From 2009 to 2022, U.S. exports of food and agricultural products to Peru doubled, from \$526 million to \$1.14 billion. U.S. consumer-oriented product exports, at \$355 million, accounted for 31 percent of U.S. food exports to Peru in 2022. The PTPA strengthens the competitiveness of U.S.-origin food and agricultural products in 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 nearly equal to U.S. bulk commodity exports to Peru in the next few years.

Section IV: Best Product Prospects

a. Products Present in the Market That Have Good Sales Potential

- Cheese: U.S. cheeses are used in food processing but have potential in the HRI and retail food sectors. The United States is the main supplier with a market share of 29 percent. Fast food chains have increased demand for grated and processed cheese. U.S. cheese exports grew 21 percent in 2022.
- Beef and offal: Consumers' increased purchasing power is driving demand for high-quality U.S. beef. However, there is potential for other affordable cuts suitable for the HRI sector. The United States holds a 19 percent market share of imported beef, including offals. The GOP initiated a campaign against child anemia which is favorable for meat offals.
- Poultry meat: Peru is a major poultry consumer. Poultry meat had a significant reduction due to pandemic restrictions since most of the volume imported (meat in general) goes to the HRI sector. Exports in 2022 reached \$29 million, yet haven't reached pre-pandemic levels. The U.S. is the second largest supplier holding 16 percent of the import market share. Quotas under the PTPA: 17 years linear with a 6 percent increase in the tariff rate quota (TRQ) per year. Foodservice is the main channel, especially for leg-quarters.
- Tree Nuts: local importers recognize a higher quality of U.S. nuts and almonds. U.S. exports decreased 11 percent in 2022 driven by a lower demand for fresh almonds and nuts. U.S. processed nuts and almonds are by far the largest imported products, however, there was a slight decrease in 2022. The U.S. is currently the largest supplier of this category, holding 33 percent of the import market share.
- Wine: Niche market for quality wines. Peru's wine consumption is growing to 1.5 liters per person. Given the international recognition of Peru's gastronomy, there is a growing demand for high-value products. In 2022, U.S. wine exports grew 90 percent accounting for 1.6 market share of the import market share.
- Apples: Chile has 77 percent of the import market share for apples. U.S. exports in 2022 fell due to lower production yields and a shortage in supply reaching \$7.4 million, considering the export window opportunity: November-February. Recognized quality of U.S. apples.
- Sauces & Condiments: consumption increased during the pandemic and maintained throughout 2022. Consumers are looking for new flavors. The United States is the second largest supplier in this category, holding 20 percent of the import market share.
- Pork meat: The implementation of PTPA has been beneficial for the pork industry in the United States. Importers look for beef and pork cuts to attend food service channels. The domestic market is seeking economical and diverse cuts to cater to a wider segment. In 2022, U.S. pork exports accounted for 21 percent of the imported market share.

- Distilled spirits: In 2022, exports in this category from the United States increased by 83 percent. Bartenders are increasingly interested in U.S. whiskeys, along with liqueurs, experiencing the highest growth and market share. The vodka category also experienced significant growth, exceeding 100 percent. U.S. distilled exports reached \$3.1 million, accounting for a 4 percent market share in imports.
- Citrus: Strong local competition. The United States holds 84 percent of the import market. Imports from the world decreased 34 percent in 2022 due higher domestic supply. U.S. orange exports reached \$2.6 million.

b. Products Not Present in Significant Quantities, but with Good Sales Potential

- Sausages: Strong local competition. High-end gourmet offers best possibilities for U.S. product. Fast-food restaurants are the main channel.
- Peaches, Cherries, and Nectarines: There is a growing interest in cherries/maraschinos for food service and retail. Chile has 99 percent of import market share.
- Grapes, Raisins: imports from the world have increased 11 percent with respect 2021. Chile has 63 percent of import market share. Export window opportunity, September-December.
- Ham processed: High-end gourmet offers the best possibilities for U.S. product.
- Beer: Strong local competition. Local breweries produce and import new brands. Mexico with a 67 percent import market share is the top supplier. Niche market for U.S. premium craft beers with culinary development.

c. Top Consumer-Oriented Products Imported from World & U.S. in 2021, US\$ Million.

Table 3: Imports of Consumer-Oriented Products

Imports from the World (\$MM) - 2022		Imports from the U.S. (\$MM) - 2022	
Food Preparations	258	Mlk/Crm,conc,Powd. Cont, Not Sweet, Gran/Solids Exc 1.5%	66
Mlk/Crm,conc,Powd. Cont, Not Sweet, Gran/Solids Exc 1.5%	140	Mlk/Crm,conc,Powd, Cont, weth or Not Sweet, Gran/Solids not Exc 1.5%	59
Chicken Cuts	97	Food Preparations	49
Mlk/Crm,conc,Powd, Cont, weth or Not Sweet, Gran/Solids not Exc 1.5%	86	Chicken Cuts	26
Sugar Confectionary	54	Dog and Cat Food	11
Food Prep Infant	51	Potatoes Prepared or Preserved	10
Dog and Cat food	46	Other Non-Alcoholic Beverages	9
Beer made from Malt	43	Cheese	9
Fats and Oils	38	Meat of Bovine	7
Cocoa Preparations	35	Almonds fresh	6

Section V: Post Contacts and Further Information

U.S. Embassy Lima – FAS Office of Agricultural Affairs

Street Address: Avda. La Encalada, Cuadra 17, Monterrico-Surco, Lima, Peru

Mailing Address: Unit 3785, DPO AA 34031

Phone: (511) 434-3042; Fax: (511) 434-3043; E-mail: Aglima@usda.gov

For further information, see www.fas.usda.gov. See also FAS Lima’s Exporter Guide and Food and Agricultural Import Regulations and Standards (FAIRS) reports.

Ministry of Foreign Trade and Tourism (MINCETUR) – Minister: Juan Carlos Mathews

Address: Calle Uno Oeste 050, Urb. Corpac, San Isidro, Lima 27

Phone: (511) 513-6100; Fax: (511) 224-3362; www.mincetur.gob.pe

Hotel and Restaurant Association (AHORA) – President: Adolfo Perret

Address: Av. Benavides 881, Miraflores, Lima 18

Phone: (511) 444-4303; Fax: (511) 444-7825; E-mail: ahora@ahora-peru.com ; www.ahora-peru.com

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; E-mail: amcham@amcham.org.pe; www.amcham.org.pe

Attachments:

No Attachments