

# PECC TRADE FORUM

Implications for  
agribusiness exports

A developing economy,  
small exporter perspective

Juan Carlos Rios Cobos

**PROMPEX**

# Next Society

## PETER DRUCKER

- *1913: Agricultural Production 70% of total trade*
- *2001: 17% of total trade*

# Major concerns.....

- *Slow liberalisation process*
- *Bilateral, multilateral agreements*
- *Subsidies*
- *Sanitary restrictions*
- *Enviromental regulations*
- *Labour conditions*
- *GMP*
- *Distribution channels*

# Top ten retailers in the EU

| 2000                     |             |              | 2005         |             |      | 2010         |             |      |
|--------------------------|-------------|--------------|--------------|-------------|------|--------------|-------------|------|
| 1.                       | Carrefour   | 66.9         | 1.           | Carrefour   | 93.7 | 1.           | Carrefour   |      |
| 2.                       | Metro       | 48.9         | 2.           | Metro       | 58.7 |              | 131.1       |      |
| 3.                       | Intermarche | 31.9         | 3.           | Tesco       | 48.5 | 2.           | Tesco       | 78.0 |
| 4.                       | Rewe        | 31.6         | 4.           | Auchan      | 43.9 | 3.           | Ahold       | 72.7 |
| 5.                       | Auchan      | 30.3         | 5.           | Ahold       | 40.6 | 4.           | Metro       | 70.4 |
| 6.                       | Tesco       | 30.1         | 6.           | Rewe        | 40.1 | 5.           | Wal-Mart    | 67.2 |
| 7.                       | Aldi        | 26.4         | 7.           | Aldi        | 37.0 | 6.           | Auchan      | 63.7 |
| 8.                       | Edeka       | 25.5         | 8.           | Intermarche | 36.0 | 7.           | Aldi        | 51.7 |
| 9.                       | Sainsbury   | 22.8         | 9.           | Wal-Mart    | 33.6 | 8.           | Rewe        | 51.0 |
| 10.                      | Ahold       | 22.7         | 10.          | Sainsbury   | 29.6 | 9.           | Casino      | 43.0 |
| <b>Facturación Total</b> |             | <b>337.1</b> |              |             |      | 10.          | Intermarche | 40.7 |
| <b>% Concentración</b>   |             |              | <b>461.7</b> |             |      | <b>669.7</b> |             |      |
|                          |             |              | <b>45.9%</b> |             |      | <b>60.5%</b> |             |      |
|                          |             | <b>37.4%</b> |              |             |      |              |             |      |

# Concentration of distribution channels

- ***“50,000 suppliers for 30  
retailers and 10 food service”***
- Promar International

# Competitiveness as a National Policy

- *National Competitiveness Council*
- *National Agricultural Commission*
- *Proinversion*
- *Prompex*
- *Growers associations.....*

# Competitiveness as a National Policy

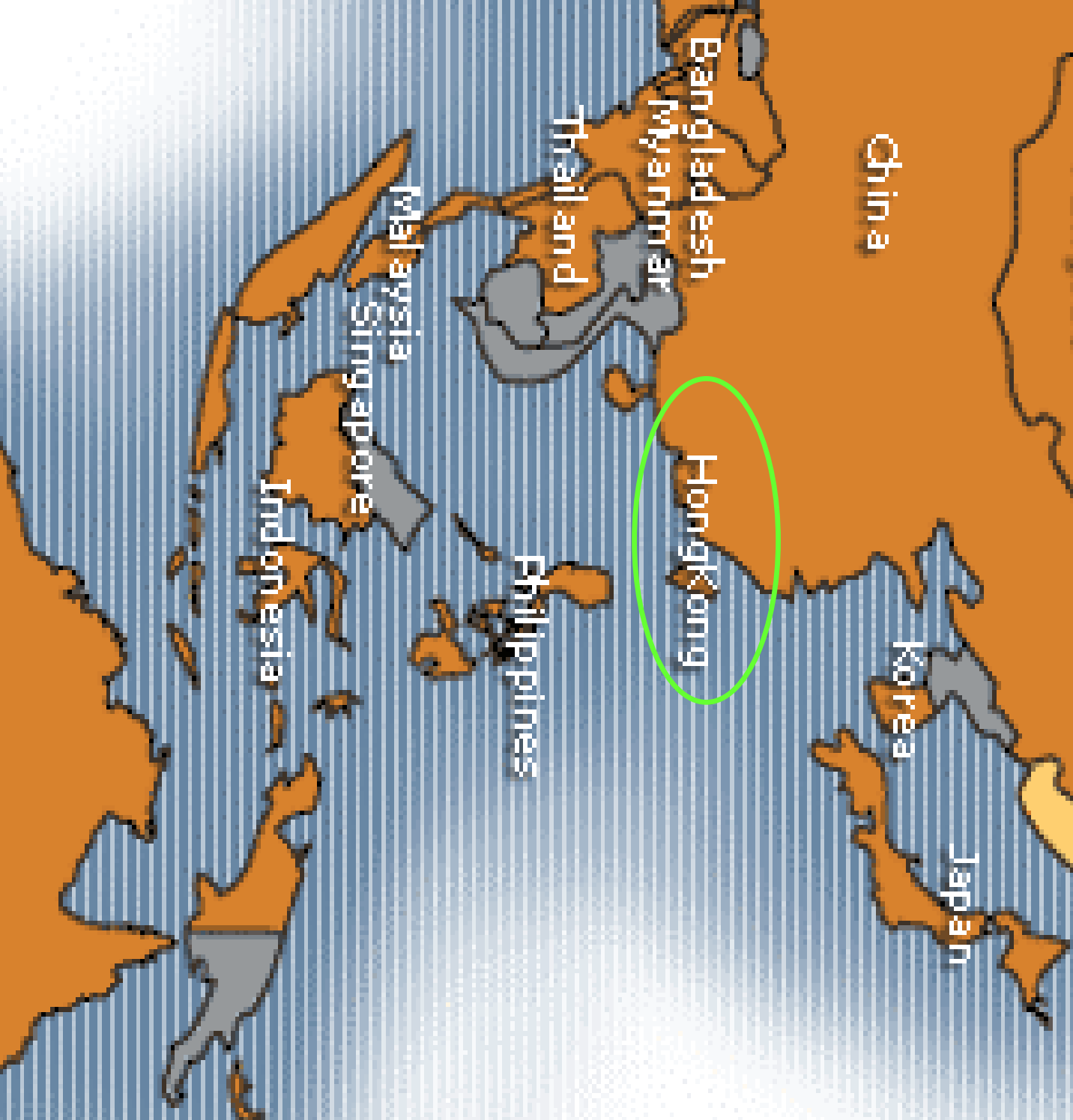
- *Investment - infrastructure*
- *R & D and technology*
- *Long term financial facilities*
- *Sanitary protocols*
- *Market intelligence.....*

**WANTED!**



***Ceratitidis capitata* Wied.**





# **WALL MART EN CHINA**

## **200 TIENDAS EN 3 AÑOS**



**CHINA**  
**MARZO DEL 2002**

## UVA DE SUDAFRICA ....



CHINA  
MARZO DEL 2002

## UVA DE CHILE ....



CHINA  
MARZO DEL 2002

## FRUTA COMO REGALO ....



CHINA  
MARZO DEL 2002

## MANGO DE FILIPINAS ....



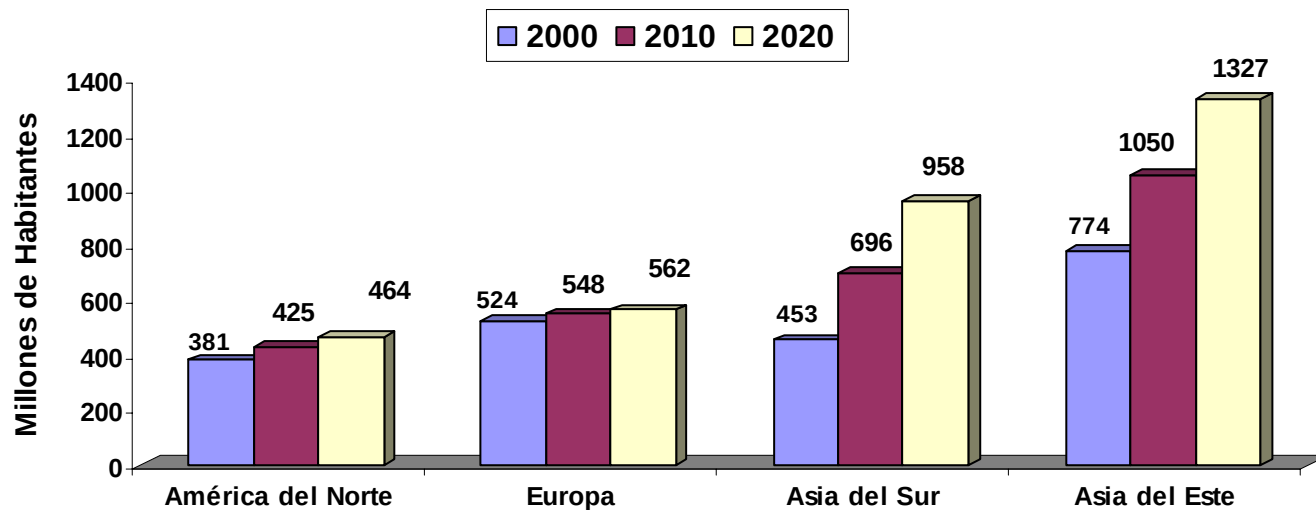
CHINA  
MARZO DEL 2002

## Fruit in China - retailer



CHINA  
MARZO DEL 2002

# Trends in food consumption - Major areas



Fuente: Promar Internacional  
Elaboración: Prompex