



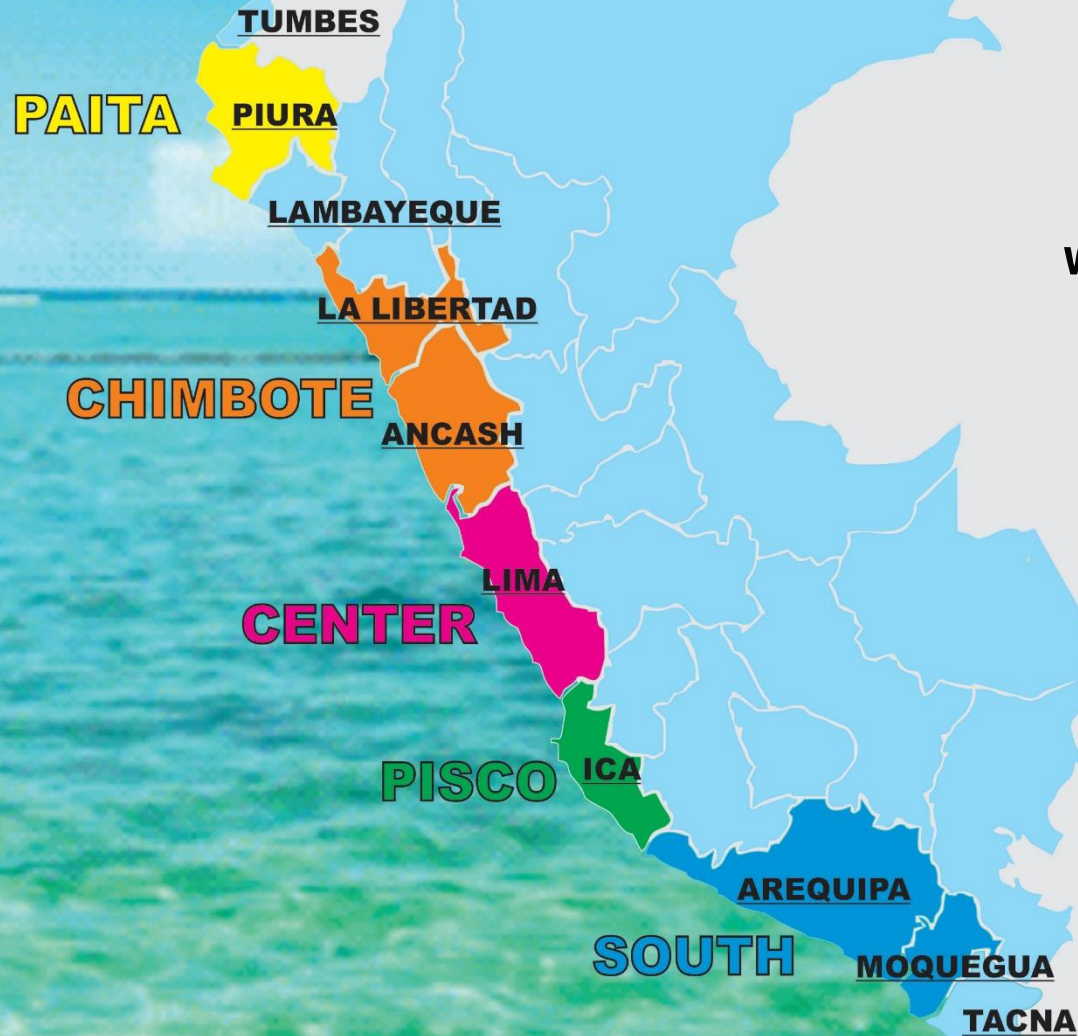
THIS IS PERU!
这是秘鲁!

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PERUVIAN FISHMEAL INDUSTRY

秘鲁鱼粉行业

BY REGIONS
按地区分列



地区
REGIONS
PAITA
CHIMBOTE
CENTER
PISCO
SOUTH

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A) INDUSTRIAL FISHMEAL & FISHOIL 工业鱼粉和鱼油

- **ANCHOVY FISHMEAL / FISHOIL:** WHOLE ANCHOVY FROM INDUSTRIAL FLEET, DISCHARGE DIRECTLY TO INDUSTRIAL FISHMEAL PLANTS .
- **鳀鱼粉/鱼油:** 来自工业捕鱼船队的鳀鱼整鱼，直接卸货到工业鱼粉厂。



B) RESIDUAL MEALS 副产品鱼粉

- **ANCHOVY FISHMEAL:** (ANCHOVETA) TRIMMINGS FROM ANCHOVY FROM HUMAN CONSUMPTION (CANNED, FROZEN, CURED). ARTISANAL FLEETS, ARTISANAL PIERS, TRUCKING TO H/C PLANTS.

鳀鱼粉(ANCHOVETA): 人类食用的鳀鱼（罐装、冷冻、腌制）的下脚料。人工捕鱼船队，人工码头，卡车运至人类食品工厂。



- **SQUID MEAL (POTA):** TRIMMINGS FROM GIANT SQUID FROM HUMAN CONSUMPTION. ARTISANAL FLEETS, ARTISANAL PIERS/BEACH, TRUCKING TO FROZEN H/C PLANTS.

鱿鱼粉 (POTA): 人类食用的巨型鱿鱼的下脚料。人工捕鱼船队，人工码头/海滩，卡车运至冷冻人类食品工厂。



- **HAKE MEAL (MERLUZA):** TRIMMINGS FROM HAKE FROM HUMAN CONSUMPTION. SPECIAL HAKE VESSELS DISCHARGING AT SPECIALIZED PIERS, TRANSPORTED TO FROZEN H/C PLANTS.

鳕鱼粉 (MERLUZA): 人类食用的鳕鱼的下脚料。专用鳕鱼船只，在专属码头卸货，运送至冷冻人类食品工厂。



- **MAHI MAHI MEAL (PERICO):** TRIMMINGS FROM MAHI MAHI FROM HUMAN CONSUMPTION. ARTISANAL FLEETS, ARTISANAL PIERS/BEACH, TRUCKING TO FROZEN H/C PLANTS.

鲳鱼粉 (PERICO): 人类食用的鲳鱼的下脚料。人工船队，人工码头/海滩，卡车运至冷冻人类食品工厂。



- **TUNA MEAL (ATUN):** TRIMMINGS FROM TUNA FROM HUMAN CONSUMPTION. SPECIAL TUNA VESSELS DISCHARGING AT SPECIALIZED PIERS, TRANSPORTED TO FROZEN H/C PLANTS.

金枪鱼粉 (ATUN): 人类食用的金枪鱼的下脚料。专用金枪鱼船只，在专属码头卸货，运送至冷冻人类食品工厂。



- **SHRIMP MEAL (LANGOSTINO):** TRIMMINGS FROM SHRIMP FROM HUMAN CONSUMPTION. AQUAFARMS IN TUMBES, PROCESSING LEFTOVERS TRUCKED TO RESIDUAL PLANTS.

虾粉 (LANGOSTINO): 人类食用的虾的下脚料。通贝斯的水产养殖场，经过处理的下脚料用卡车运至残余物工厂。

INDUSTRIAL AND RESIDUAL PLANTS

工业厂和副产品厂

BY REGIONS

按地区分列

PAITA REGION

CHIMBOTE REGION

CENTER REGION

PISCO REGION

SOUTH REGION

REGIONS

- PAITA
- CHIMBOTE
- CENTER
- PISCO
- SOUTH



PAITA REGION

INDUSTRIAL	1 PLANT
工业	工厂
RESIDUAL	16 PLANTS
副产品	工厂

CHIMBOTE REGION

INDUSTRIAL	18 PLANTS
工业	工厂
RESIDUAL	11 PLANTS
副产品	工厂

CENTER REGION

INDUSTRIAL	15 PLANTS
工业	工厂
RESIDUAL	4 PLANTS
副产品	工厂

PISCO REGION

INDUSTRIAL	8 PLANTS
工业	工厂
RESIDUAL	3 PLANTS
副产品	工厂

SOUTH REGION

INDUSTRIAL	6 PLANTS
工业	工厂
RESIDUAL	NONE
副产品	无

TOTAL INDUSTRIAL	48 PLANTS
总计工业	工厂
TOTAL RESIDUAL	34 PLANTS
总计副产品	工厂
GRAND TOTAL	82 PLANTS
共计	工厂

INDUSTRIAL VS RESIDUAL PLANTS

工业厂和副产品厂

BY REGIONS / PORTS

按地区/港口分列



PAITA

BAYOVAR: 1 INDUSTRIAL PLANT/ 1个工业厂
 VARIOUS: 16 RESIDUAL PLANTS/ 16个副产品厂

CHIMBOTE

CHICAMA: 6 INDUSTRIAL PLANTS/ 6个副产品厂
 COISHCO: 3 INDUSTRIAL PLANTS/ 3个工业厂
 CHIMBOTE: 8 INDUSTRIAL / 10 RESIDUAL
 8个工业厂/10个副产品厂
 SAMANCO: 1 INDUSTRIAL PLANT/ 1个工业厂
 HUARMEY: 1 RESIDUAL PLANT/ 1个副产品厂

CENTER

SUPE 4 INDUSTRIAL PLANTS/ 4个工业厂
 VEGUETA 2 INDUSTRIAL PLANTS/ 2个工业厂
 HUACHO 1 INDUSTRIAL PLANT/ 1个工业厂
 CHANCAY 4 INDUSTRIAL PLANTS/4个副产品厂
 CALLAO 4 INDUSTRIAL / 4 RESIDUAL
 4个工业厂/4个副产品厂

PISCO

TAMBO DE MORA: 4 INDUSTRIAL PLANTS/4个工业厂
 PISCO: 4 INDUSTRIAL / 3 RESIDUAL
 4个工业厂/3个副产品厂

SOUTH

ATICO: 1 INDUSTRIAL PLANT/1个工业厂
 LA PLANCHADA: 1 INDUSTRIAL PLANT/1个工业厂
 MATARANI: 1 INDUSTRIAL PLANT/1个工业厂
 MOLLENDO: 1 INDUSTRIAL PLANT/1个工业厂
 ILO: 2 INDUSTRIAL PLANTS/2个工业厂

TOTAL INDUSTRIAL/总计工业厂: 48
TOTAL RESIDUAL/总计副产品厂: 34
GRAND TOTAL/合计: 82

INDUSTRIAL FISHMEAL PLANTS/工业鱼粉厂

TOP 6 (DETACH 36 PLANTS)
排名前6位的企业 (分为36个工厂)
(ABOUT 88% OF ALL F/M EXPORTS IN 2021)
(约占2021年鱼粉出口总量的88%)



D DIAMANTE (5)
CHICAMA, SUPE, CALLAO, PISCO, MOLLENDO



E EXALMAR (7)
CHICAMA, CHIMBOTE, CHIMBOTE (RENTED GER EXPORT)
HUACHO, CALLAO, TAMBO DE MORA, ILO (RENTED GER EXP)



T TASA (9)
CHICAMA, CHIMBOTE, SAMANCO, SUPE, VEGUETA, CALLAO,
PISCO, ATICO, MATARANI.



A AUSTRAL (4)
COISHCO, CHANCAY, PISCO, ILO.



C COPEINCA / CFG (7)
BAYOVAR, CHICAMA, CHIMBOTE, CHANCAY, TAMBO DE MORA,
PISCO, LA PLANCHADA.



H HAYDUK (4)
CHICAMA, COISHCO, VEGUETA, TAMBO DE MORA.



INDUSTRIAL 'NON DETACH' FISHMEAL PLANTS

工业“非DETACH”鱼粉厂

C CENTINELA (3) CHIMBOTE, CHANCAY, TAMBO DE MORA

P PACIFICO CENTRO (3) CHICAMA, CHIMBOTE, SUPE

C CANTABRIA (1) COISHCO

P PELAYO (1) SUPE

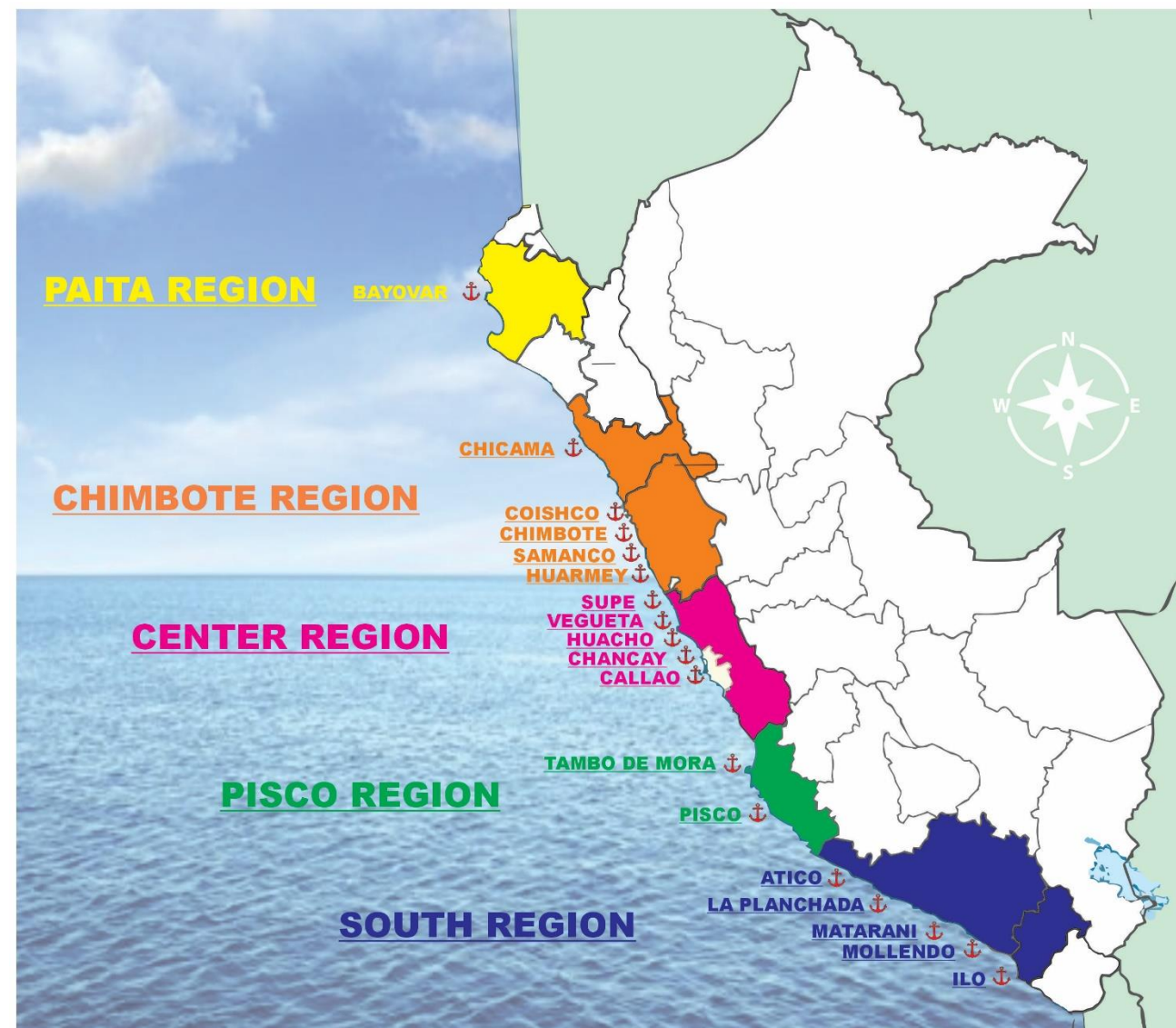
C CARAL (1) CHANCAY

C CAPRICORNIO (1) CALLAO

C CANTARANA (1) CHIMBOTE

J JADA (1) CHIMBOTE

TOTAL/总计: 12 PLANTS/ 工厂



PERUVIAN STEAMDRIED FISHMEAL QUALITY SPECIFICATIONS

秘鲁蒸干鱼粉质量规范

	SUPER PRIME 超高级	PRIME 高级	TAIWAN PRIME 台湾级	THAILAND PRIME 泰国级	STANDARD 标准级	COMMENTS 备注
PROTEIN (MIN)/蛋白质 (最小值)	68	67	67	67	65	DUMAS METHOD/杜马斯法
FAT (MAX)/脂肪 (最大值)	10	10	10	10	12	
MOISTURE (MAX)/水分 (最大值)	10	10	10	10	10	
SALT / SAND (MAX)/盐/砂分 (最大值)	4	5	5	5	5	COMBINED/混合
SAND ALONE (MAX)/砂分 (最大值)	1	2	2	2	2	
ASH (MAX)/灰分 (最大值)	17	18	18	18	19	
TVN (MAX)/挥发性盐基氮 (最大值)	100	120	120	150	150	TOTAL VOLATILE NITROGEN 总挥发性盐基氮
FFA (MAX)/游离脂肪酸 (最大值)	7.5	10	10	10	10	FREE FATTY ACID/游离脂肪酸
HISTAMINE (MAX)/组胺 (最大值)	500	1000	--	--	--	
ANTIOXIDANT ETHOX (MIN)/抗氧化剂 乙氧基喹啉 (最小值)	150	150	150	150	150	AT TIME OF LOADING/装运时
UNWANTED SUBSTANCES/废物	N.D*	N.D*	N.D*	N.D*	N.D*	
SALMONELLA / SHIGUELLA/沙门氏菌/ 志贺氏菌	NEG	NEG	NEG	NEG	NEG	

N.D* NON DETECTED - DIFFERENT REQUIREMENTS FROM CHINA AUTHORITIES

无检出——与中国当局的要求不同

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PERUVIAN FISHMEAL EXPORT PORTS 秘鲁鱼粉出口港

AVAILABLE LOADING PORTS 现有装货港

• PAITA/派塔 (ACTIVE FOR FISHMEAL) (用于鱼粉)	CONTAINERS 集装箱	SMALL INDUSTRIAL VOLUME (1 PLANT), MORE RESIDUAL VOLUME (MANY PLANTS) 工业鱼粉厂少 (1个工厂), 副产品鱼粉厂多 (多个工厂)
• CHIMBOTE/钦博特 (ACTIVE FOR FISHMEAL) (用于鱼粉)	BREAK BULK 散装货物	VOLUME BREAK BULK COMING FROM CHICAMA / CHIMBOTE PLANTS 来自奇卡马/钦博特工厂的散装货物
• CALLAO/卡亚俄 (ACTIVE FOR FISHMEAL) (用于鱼粉)	CONTAINERS 集装箱	MAIN CONTAINER PORT, VOLUME FROM CHIMBOTE, CENTER, PISCO, EVEN FROM SOUTH REGIONS, ALL TRUCKED TO CALLAO FOR FCL SHIPMENTS 主要集装箱港口, 货物来自钦博特、中部地区、皮斯科, 甚至南部地区, 所有货物均用卡车运至卡亚俄进行整箱装运
• CHANCAY/钱凯 (UNDER CONSTRUCTION) (在建)	CONTAINERS 集装箱	EXPECT OPERATIVE 2023/2024 NEW PORT UNDER CONSTRUCTION* (*) JOINT VENTURE COSCO/VOLCAN 新港口目前正在建设中, 预计2023/2024年投入使用* (*) 中远海运港口公司/火山矿业集团合资运营
• PISCO/皮斯科 (ACTIVE FOR B/B FISHMEAL) (用于散装鱼粉)	CONTAINERS/BREAK BULK 集装箱/散装货物	BREAK BULK WHEN VOLUME AVAILABLE FUTURE FISHMEAL FCL SHIPMENTS (PROJECT) 可用于散装货物 (如有), 未来鱼粉整箱装运 (项目)
• MATARANI/马塔拉尼 (NOT ACTIVE FOR FISHMEAL) (不用于鱼粉)	CONTAINERS / BREAK BULK 集装箱/散装货物	NO SERVICE IN FCL FOR FISHMEAL SINCE PANDEMIC NO VOLUME FOR BREAK BULK 自新冠疫情以来无鱼粉整箱装运服务, 不用于散装货物
• ILO/伊洛 (NOT ACTIVE FOR FISHMEAL) (不用于鱼粉)	CONTAINERS / BREAK BULK 集装箱/散装货物	NO SERVICE IN FCL FOR FISHMEAL AVAILABLE NO VOLUME FOR BREAK BULK 无鱼粉整箱装运服务, 不用于散装货物

PERUVIAN FISHMEAL PACKING AND ANTIOXIDANT 秘鲁鱼粉包装与抗氧化剂

• PACKING ALTERNATIVES/包装选项



50 KG BAGS (POLYPROPELENE LAMINATED) BREAK BULK OR IN 20/40 FCL (TRADITIONAL)

50公斤袋子（聚丙烯压膜）散装或20/40 整箱装运（惯例）



25 KG BAGS (POLYPROPELENE LAMINATED) BREAK BULK OR IN 20/40 FCL (UPON REQUEST)

25 公斤袋子（聚丙烯压膜）散装或20/40整箱装运（根据要求）



1 TON JUMBO BAGS (POLYPROPELENE) BREAK BULK OR IN 40 FCL (UPON REQUEST)

1吨大袋（聚丙烯）散装或40整箱装运（根据要求）



BULK IN VESSEL (BLEEDING SYSTEM)

散装装船（抽气系统）



BULK IN CONTAINERS 20 AND/OR 40 FOOTERS WITH INNER POLYETHELENE LINER

散装在20和/或40英尺的带有聚乙烯内衬的集装箱中



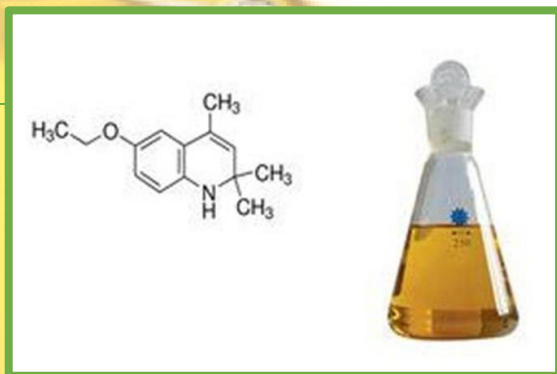
PALLETIZED IN 50 / 25 / JUMBO BAGS (UPON REQUEST/EXPENSIVE)

用托盘装运于50/25/大袋中（根据要求/价格昂贵）

PERUVIAN FISHMEAL PACKING AND ANTIOXIDANT 秘鲁鱼粉包装与抗氧化剂

• ANTIOXIDANT ALTERNATIVES/抗氧化剂选项

- **ETHOXYQUIN (TRADITIONAL)**
- 乙氧基喹啉（惯例）
- **BHT / BHA (EUROPE, USA, ECUADOR, CHILE, CANADA, AUSTRALIA, OTHERS)**
- 二丁基羟基甲苯/丁基羟基茴香醚（欧洲、美国、厄瓜多尔、智利、加拿大、澳大利亚等地区）
- **NATURAL (TOCOPHEROL / ROSEMARY EXTRACT) (UPON REQUEST/VERY EXPENSIVE)**
- 天然抗氧化剂（生育酚/迷迭香提取物）（根据要求/非常昂贵）



ETHOXYQUIN
乙氧基喹啉



BHT / BHA
二丁基羟基甲苯/丁基羟基茴香醚



NATURAL (TOCOPHEROL / ROSEMARY EXTRACT)
天然抗氧化剂（生育酚/迷迭香提取物）

PERUVIAN FISHMEAL SELLING/BUYING BASIS

秘鲁鱼粉买卖基本原则

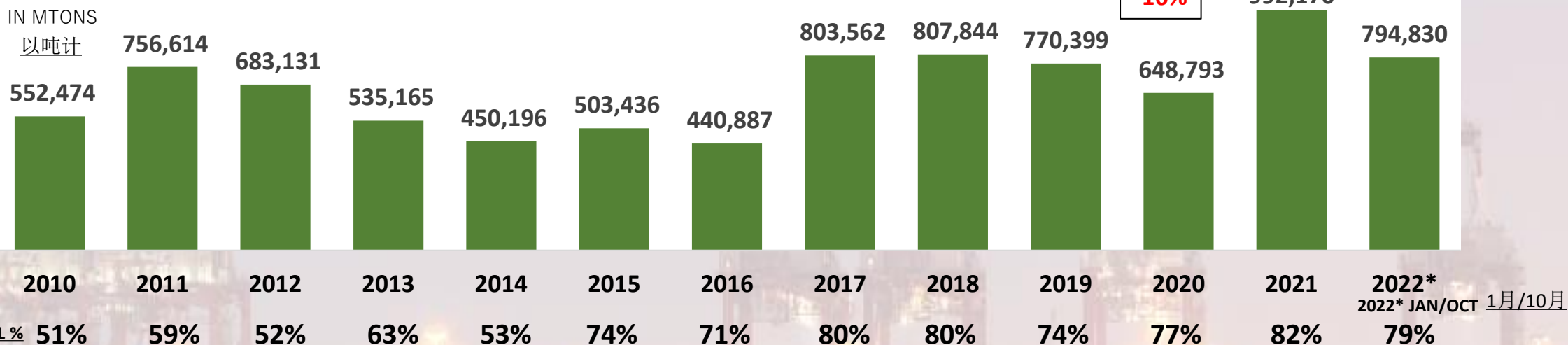
<u>INCOTERMS/国际贸易术语</u>	<u>COMMENTS/注释</u>	<u>GAFTA CONTRACT/谷物及饲料贸易协会合同</u>
<ul style="list-style-type: none">• EXW (EXWORKS) <u>工厂交货</u>	FOT (FREE ON TRUCK) @ PLANT – LOCAL MARKET AND ECUADOR 卡车上交货价@工厂——当地市场和厄瓜多尔	-
<ul style="list-style-type: none">• CFR (COST AND FREIGHT) <u>成本加运费</u>	BY LAND TRUCKED DESTINATIONS, MAINLY TO ECUADOR BY SEA CFR FREE OUT OR LINER OUT BREAKBULK CARGO. OLD SCHOOL SALES 运至陆路货运目的地，主要为厄瓜多尔 海运卖方(船方)负责将货物运至卸货港,但不负责卸货或者负责卸载散装货物。 传统销售模式	GAFTA No. 10 /GAFTA 10号合同
<ul style="list-style-type: none">• FAS (FREE ALONG SIDE) <u>船边交货</u>	FAS VESSEL IN BAGS OR BULK. STOWAGE BUYERS ACCOUNT MAINLY TO GERMANY IN BULK 袋装或散货，船边交货。买家承担理舱费。主要以散货形式运往德国	GAFTA No. 23A/GAFTA 23A号合同
<ul style="list-style-type: none">• FOB (FREE ON BOARD) <u>船上交货</u>	IN BAGS OR BULK ON VESSEL. STOWAGE SELLERS ACCOUNT 袋装或散装，船上交货。卖家承担理舱费。	GAFTA No. 118 /GAFTA 118号合同
<ul style="list-style-type: none">• FOB LINER FCL <u>船上交货，整箱班轮运输</u>	FREE ON BOARD LINER STUFFED IN CONTAINERS IN BAGS OR BULK IN 20/40 FOOTERS 船上交货，集装箱班轮装运。袋装或散装在20/40英尺的集装箱中	GAFTA No. 89/GAFTA 89号合同
<ul style="list-style-type: none">• CFR LINER FCL <u>成本加运费，整箱班轮运输</u>	COST AND FREIGHT LINER STUFFED IN CONTAINERS IN BAGS OR BULK IN 20/40 FOOTERS 成本加运费，集装箱班轮装运。袋装或散装在20/40英尺的集装箱中	GAFTA No. 88/GAFTA 88号合同

NOTE: NO CIF (COST INSURANCE AND FREIGHT), INSURANCE ALWAYS COVERED BY BUYERS AT DESTINATION

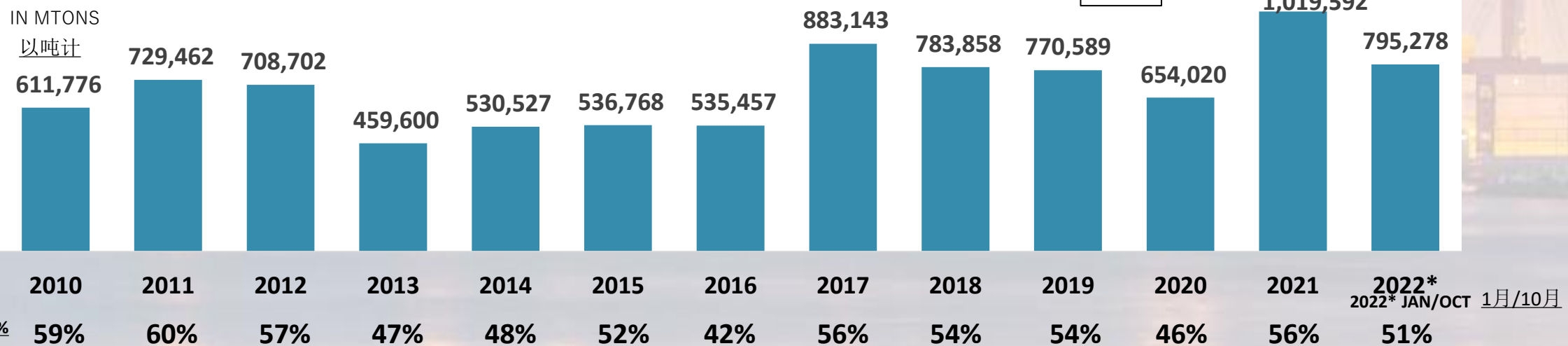
注：没有到岸价（成本加保险费加运费），保险总是由目的地的买方支付

PERU F/M EXPORTS TO CHINA F/M IMPORTS FROM PERU

PERU EXPORTS TO CHINA 2010/2022 2010-2022年秘鲁对中国出口量



CHINA IMPORTS FROM PERU 2010 - 2022 2010-2022年中国从秘鲁进口量

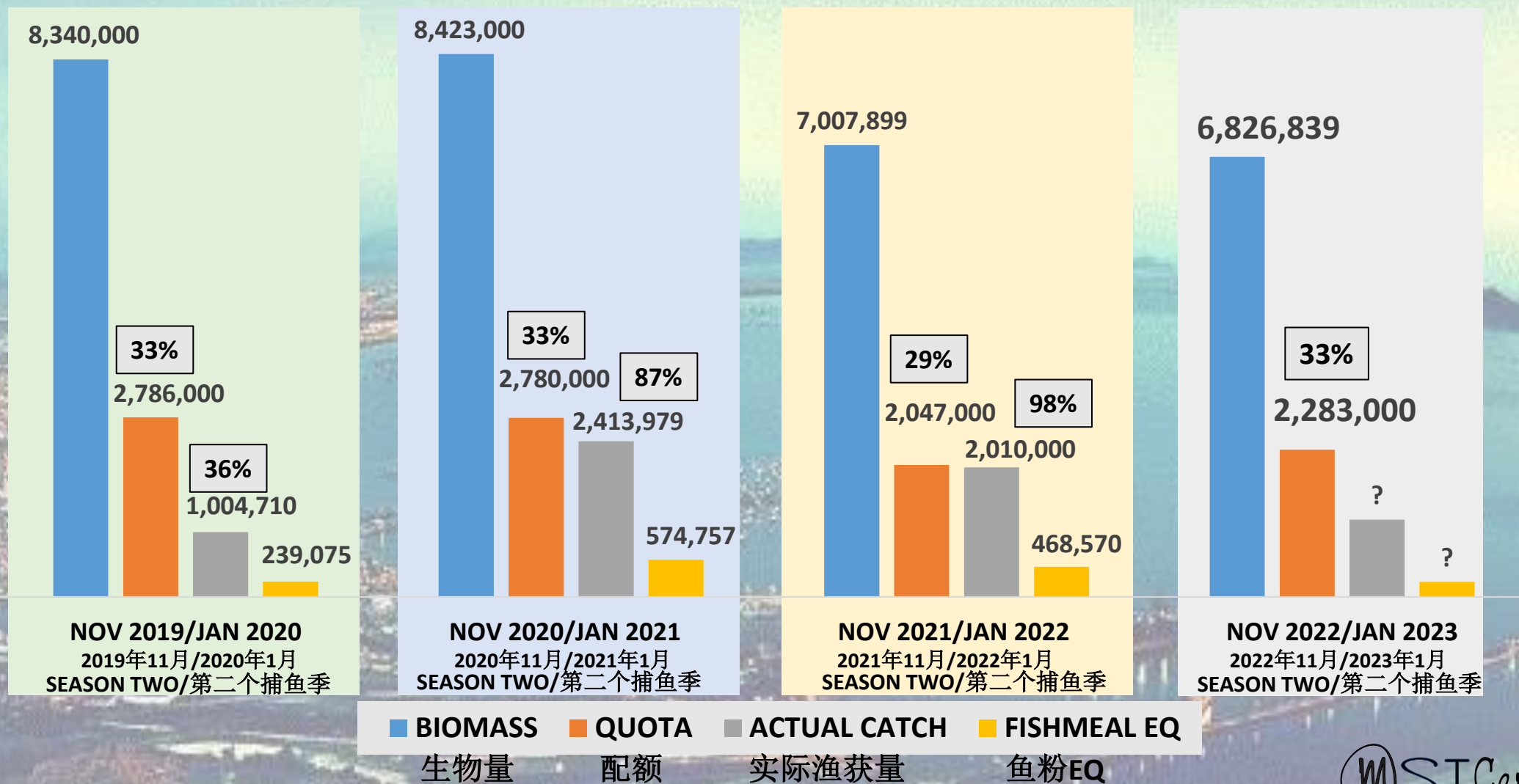


PERUVIAN FISHMEAL INDUSTRY NORTH/CENTER REGIONS

秘鲁北部/中部地区鱼粉行业

(PAITA/CHIMBOTE/CENTER/PISCO) BIOMASS / QUOTA / CATCH / FISHMEAL/ 生物量/配额/渔获量/鱼粉

(IN METRIC TONS/ 以吨计)

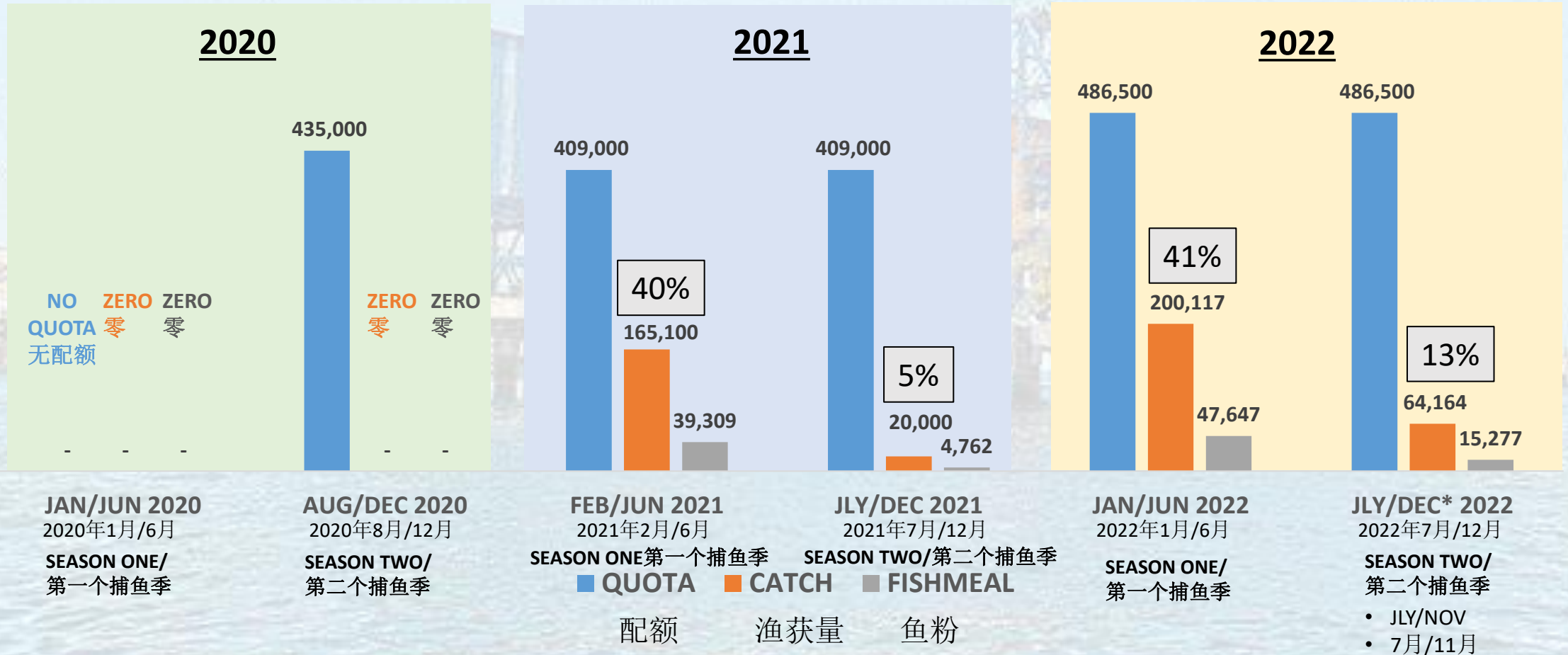


PERUVIAN FISHMEAL INDUSTRY SOUTH REGION

秘鲁南部地区鱼粉行业

(ATICO/ILO RANGE) QUOTA / CATCH / FISHMEAL/配额/渔获量/鱼粉

IN METRIC TONS/以吨计



NORTH / CENTRAL QUOTA VS BIOMASS STATISTICS

北部/中部地区配额与生物量统计

SEASON TWO/第二个捕鱼季

YEAR S2	BIOMASS 生物量	QUOTA FIXED 限定配额	BIOMASS 生物量	SEASON 捕鱼季	FISHING 捕鱼作业	ACTUAL	LANDINGS
年 第二个捕鱼季	MT 吨	MT 吨	SHARE % 生物量占比%	LIFTING/ENDING 开始/结束	DAYS/WEEKS 天数/周数	LANDINGS 实际捕获量	SHARE % 捕获量占比%
2015	6,010,000	1,110,000	18	NOV 17 / JAN 31 11月17日/1月31日	75 D / 10.7 W	109 万吨	98.20
2016	6,860,000	2,000,000	29	NOV 11 / JAN 31 11月11日/1月31日	81 D / 11.5 W	196 万吨	98.00
2017	6,016,000	1,490,000	25	NOV 23 / JAN 31 11月23日/1月31日	69 D / 9.9 W	66.1 万吨	44.40
2018	7,160,000	2,100,000	29	NOV 15 / JAN 31 11月15日/1月31日	77 D / 11 W	209 万吨	99.50
2019	8,340,000	2,786,000	33	NOV 6 / JAN 15 11月6日/1月15日	70 D / 10 W	100 万吨	35.90
2020	8,423,000	2,780,000	33	NOV 12 / JAN 25 11月12日/1月25日	74 D / 10.6 W	241 万吨	86.70
2021	7,007,899	2,047,000	29	NOV 15 / JAN 15 11月15日/1月15日	61 D / 8.7 W	201 万吨	98.20
2022	6,826,839	2,283,000	33	NOV 23 / JAN 31 11月23日/1月31日	69 D / 9 W	?	?

THANK YOU,
GRACIAS..
谢谢



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