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Special Issue on Fishing and Aquaculture

Letter from the Editor

The Fishing and Aquaculture Sector in the European Union

The fishing industry in the EU is the third biggest worldwide, since it supplies approximately 6.9 million tons of fish per year. Fishing and the industry transforming its products employ more than 400,000 people.

The European Union is increasingly dependent on imports of fish products and has become the main importing market. In 2009, 60% of fish consumption in the European Union was imported. Total consumption in 2007 amounted to 11.3 million tons, 10% of the world's consumption. The European Union consumed 23 kg of fishing products per person and per year, above the world's average (17.1 kg per person and per year).

Regarding access to markets, Latin America and the Caribbean are better placed than China and other main suppliers. Latin American companies benefitting from trade agreements and preferential systems, such as the SGP+ may import their products tariff-free. However, China (a country benefitting from the SGP) and other countries without trade agreements, pay up to 20% in tariffs in some cases.

Changes to the population and their preferences open new opportunities for fishery products. The market for fishery products in the European Union features Health, Convenience and Indulgency (experience) trends. Fastest growing fishery products in European markets are salmon, shrimp, smoked filets in general and neutral-tasting, low-priced products such as tilapia, Nile perch and catfish.

Aquaculture in the EU amounts to significant activity. The current production is at around 1.3 million tons per year, which is

worth € 2.900 million.

Although aquaculture continues its expansion around the world, the sector has stagnated in the EU in the last few years. Even though farming sea-water fish is booming (mainly due to three species: salmon, sea bass and sea bream), the production of shellfish and fresh-water fish has decreased steadily for the last few years.

European aquaculture may be broken down in three main sectors: farming sea fish, shellfish and fresh-water fish. The EU farms as well crayfish and seaweeds, but this type of production is still marginal.

The European Union, leader in technology and research, is robustly founded and well-grounded business-wise, thus fostering a favorable climate for many of the most-demanded species nowadays.

The most significant step of the production process may be the strict quality standards set, aiming to guarantee that aquaculture products are apt for human consumption, favorable for the environment where they are farmed and respectful of animal health.

However, the advantages entail challenges as well. Strict standards are unavoidably translated into high costs, making competition in national and foreign markets harder for farmers.

Stefan Unseld
Project Manager for GIZ

Complete study on the Fishing sector:
<http://www.al-invest4.eu/pesca/>

AL-INVEST



Facilitating the internationalization
of Latin America SMEs

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Central America, Mexico and Cuba

The fishing and aquaculture sector is the main pillar of the economies of Latin America countries. SMEs from Guatemala, Honduras and Mexico are aware of this fact and are set to work, pursuing projects to improve the efficiency of production systems and the quality of final goods offered. Pursuing environmentally-friendly endeavors is also a key goal for these SMEs.

GUATEMALA

Efficient and Sustainable Fishing

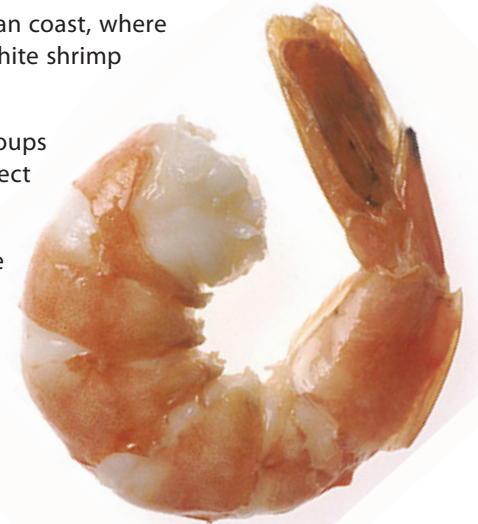
The core of the fishing and aquaculture activity in Guatemala takes place in the Pacific Ocean coast, where specialized fishing of shrimp, sea bream, snapper, wreckfish and shark abound, as well as white shrimp farming. This very geographical area is home to most fishery products processing plants.

This area will host approximately 20 SMEs as well as the multiple artisanal fisherfolk groups dedicated to fishing and aquaculture, which amount to a total figure of 30,000 direct and indirect jobs.

The AL-INVEST IV Program has strongly encouraged this sector. Last month of May, the International Fish Fair (SEAFOOD) took place in Brussels. Many SMEs from Guatemala attended the event, promoting and marketing their products in the framework of the Program.

The fishing sector from Guatemala is known for using advanced technologies and intensive production systems, while following sustainability standards, mainly through economically viable, socially fair and environmentally friendly operations.

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HONDURAS

Promoting the Red Tilapia



Thanks to suitable salty waters in Honduras, the aquaculture industry has expanded rapidly since the 1990s, favoring an increase in job creation and wellbeing for the population. However, the high investment necessary to develop the necessary technology, such as building ponds and pumping stations, kept this niche to big investors.

The development of red tilapia, an originally African fish, contributed to fulfilling a secondary goal in Honduras. Thanks to this industry, a local market was created for highly-nutritive food, affordable to all citizens, which fostered the growth of small and mid-sized tilapia producers in this emerging market.

The AL-INVEST IV Program has promoted this industry by collaborating with professionals such as Carlos León Ramos, an expert in aquaculture in the area of Guadalajara (Mexico). Mr. León has contributed with his expertise to promote these techniques in Honduras and offered assistance to tilapia producers in the Comayagua and Santa Bárbara regions.

Besides, the Program has offered many SMEs in Honduras the opportunity to participate in a training seminar in Guadalajara last February.

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MEXICO

Fish farming: The Solution

The geographical location of Mexico promotes the development of the fishing industry, with many coastal kilometers in the Pacific, the Gulf of Mexico and the Caribbean.

Fishing and aquaculture in Mexico are economic and social sectors creating more than 2 million direct and indirect jobs.

Nevertheless, the Mexican fishing industry faces different challenges environmentally, economically, politically and socially.

To face them and promote exports of sea food, which amount to 1.5% worldwide, the country is set to work.

The National Aquaculture and Fishing Commission has started to design, aided by several governmental and academic bodies, a planning program for the industry. The goal is to double seafood production by 2030.

The most ambitious approach consists of reducing the number of high sea fishing to boost aquaculture farming. Thus, production and consumption would increase and supply to all cities would be easier.

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Andean Region

In aquaculture, Peru has found the opportunity to promote the fishing sector. This type of farming reduces massive open water fishing, as well as its threats to the environment and the safety of marine species. Thanks to this technique, there are more Peruvian SMEs catering to EU clients regularly.

PERU

Promoting Aquaculture

For the last few years, aquaculture has experienced significant growth in Peru, both production and exports-wise. The climate of this region and the large expanse of waters suitable for this activity are some factors favoring growth. For this reason, the Peruvian Government declared it an activity of “national interest” in 2008.

The fishery products most farmed in this Latin American country are scallops and prawn, mainly oriented towards exports. However, farming trout is increasing in local and exports markets.

As foreseen by the Commission to Promote Peruvian Exports and Tourism (Promperú), Peruvian fishing exports to the EU will record 20% growth this year. This would mean more than 800 million dollars up compared to 2010.

Only this year, some 2,000 Peruvian companies exported to the EU, out of those, 86% were SMEs.

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Aquaculture aeration systems

PERU

Enhancing Production Systems in the Trout Sector

Aiming to continue with the growing trend in the fishing and aquaculture sectors, the National Chamber of Commerce, Production and Services in Peru (PERUCÁMARAS) and the AL-INVEST IV Program want to share the opportunity of developing training programs among exporters.

To improve production systems in companies specialized in trout, for example, the consultant Gloria Soledad de la Oliva Mendoza, specialist in hydrobiology, offered technical assistance on best practices in aquaculture, focusing on the business core of trout producers in Huancayo.

Ten small companies from this city were treated to the technical assistance last March 25 to 29, including personal training, checking facilities and production systems, analyzing quality, risks and threats, among others.

This type of endeavors aims to contribute to improving production processes of trout farmers, both for those seeking to export and those targeting the national market.



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Activities

Latin America Academy 2011

June 22-26, Peru

The Coordination and Services Consortium of the AL-INVEST IV Program has successfully concluded the Latin America Academy, that was held from June 22 to 26 in Lima, Peru.

The training Program, organized by EUROCHAMBRES, provided four intensive days of training to senior and middle management from organizations representing chambers and unions.

The June edition was the fifth of a series of programs, consolidating this initiative as one of the most important one in networking and benchmarking, catering to the needs of business organizations in Latin America.

The Latin America Academy is the meeting point between Latin American companies and Europe. 64 civil servants from America and representatives of business associations and European Chambers of Commerce participated.



2011 Latin American Academy's participants

Source: CS

For more information: <http://www.al-invest4.eu/actividades2/actividades-consorcio-servicios/servicios-para-organismos-intermedios/academias>

Annual AL-INVEST IV Meeting

July 19-22, Colombia



The Coordination and Services Consortium of the AL-INVEST IV Program, in collaboration with the Central America, Mexico and Cuba Consortium (CAMC by its Spanish acronym), the Andean Region Consortium (RA by its Spanish acronym) and Mercosur, Chile and Venezuela Consortium (MCV by its Spanish acronym) organizes the Annual AL-INVEST IV Conference in July.

The meeting intends to define high-impact priorities supporting the internationalization of Latin American SMEs and strengthening institutional axis to generate the necessary sustainability. The conference will bring together all partners of the AL-INVEST IV Program for 4 days, July 19 to 22, in Cartagena de Indias, Colombia.

For more information:

<http://www.al-invest4.eu/actividades2/actividades-consorcio-servicios/conferencias-anales/conferencia-anual-colombia-2011>

Sharing experiences, second call for applications

The Coordination and Services Consortium of the AL-INVEST IV Program has published who will enjoy the Sharing Experiences Program this year.

This activity plans to connect members of organizations representing the private sector in Latin America to European or Latin American organizations, such as Chambers of Commerce and Industry, Industrial Associations, Foreign Trade Bodies and Development Agencies among others.

These exchanges will be between two and four weeks long. They

contribute to building support policies for SMEs and spurring their internationalization process.

People participating in these exchanges must commit to sharing the techniques and knowledge learnt once they return to their countries of origin.

13 people from different organizations in Latin America will work with business teams in the Netherlands, Spain, the UK, Italy, France and Belgium.

The call for applications for the second round is now available:

<http://www.al-invest4.eu/al-invest/servicios-para-organismos-intermedios/pasantiasintercambios-de-experiencias>

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Congress on Logistics and Services for Foreign Trade

29-30 June, Costa Rica

CADEXCO, by means of the AL-INVEST IV Program, will hold the Congress on Logistics and Services for Foreign Trade in Costa Rica, next June 29 and 30. The main logistics and services providers of exporting SMEs will meet there.

The objectives of the congress are for SMEs to learn about international trends in logistics, quantitative optimization models to solve potential problems in the field and the latest technologies in logistics and inventory management.

The third session will take place on July 1. An expert will offer free customized technical assistance to interested SMEs.



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Business Coaching for Grape Producers

April 28 – June 23, Chile



Source: MCV

Business people in a coaching session in San Esteban, Chile

The 'Fundación Empresarial EuroChile', through the AL-INVEST IV Program and the 'Internationalization model and innovation for Chilean SMEs in the food sector' started last April 28 with 8 coaching sessions for business people producing grapes and raisins in the city of San Esteban, region of Valparaíso.

These sessions are targeted at 17 businesses of the Association of Fruit Producers of the Valle de Aconcagua, who are working with EuroChile since July in their internationalization process through the AL-INVEST IV Program. They receive assessment on trade, financial, innovation management and business culture issues.

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The Chamber of Almeria Strengthens Bonds with Peru

A group of technicians of the Chamber of Commerce of Almería (Spain) travelled to the headquarters of the National Association of Industries (Peru) to strengthen existing institutional and business cooperation relations between partner institutions in the AL-INVEST IV Program in Peru, in pursuit of a common goal: enhancing competition of Peruvian industrial companies.

This activity is part of the know-how transfer program between An-

dean and European institutions under the umbrella of the European Cooperation Program, which leads to strengthening institutions to provide better services to SMEs.

This first experience of exchanging knowledge will be repeated next October, when the representatives of the Chamber of Almeria will go back to Lima for the second part of the workshops.

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Alinv, the New AL-INVEST Brand in the Andean Region is Born

AL-INVEST IV's Logo in the Andean Region Will Become a Butterfly

CAINCO, leader of the Andean Region Consortium, was in charge of designing the logo that represents the AL-INVEST IV Program today.

This distinctive, simple, clean and dynamic logo is made up of four concave circles of different colors representing the four Consortia of this Program.

The Andean Region has decided to provoke the metamorphosis of this sign of identity into a unique, animated butterfly to promote the scope and significance of the Program.

A producer from Cruz, Eduardo Aguilera, has created this original, simple, creative concept captivating the image and communication industries in Europe. You may enjoy it on Youtube:

<http://www.youtube.com/user/alinvestIVcan>



New AL-INVEST brand in the Andean Region.

Professional training course: 'Exporting to Europe'

The Coordination and Services Consortium, through its partner GIZ and in collaboration with AVU Consultores, offers training to learn the keys to export to Europe. It is targeted at intermediary institutions members of the Program.

The course provides institutions with "a first-level tool to assess, guide and ease the first steps of companies towards foreign markets, enabling them to offer centralized, contrasted assessment to reflect on their potential and help them find the necessary information to make decisions", said Begoña Albizu, teacher of the course.

The online training is 63 hours long and extends through 8 weeks. Successful students of the module have access to the onsite training to delve into Competitive Intelligence Techniques and searching for international information.

Victoria Vidal, civil servant of the Association of Metallurgic Industries of the Argentine Republic (ADMIRA) and student at the course highlights this training enabled her to "acquire multiple tools and techniques to strengthen competition and more efficient business development of Argentine SMEs in EU markets". She states the course has taught her about "compilation, assessment and analysis of specific information necessary to develop integral exports projects".

Last May 27 the course ended for the MCV Consortium, with attendants from Brazil, Chile, Argentina, Uruguay and Paraguay. Currently, the corresponding course is underway with the Andean Region and CAMC Consortia, with attendants from Bolivia, Colombia, Peru, Guatemala, Nicaragua and Mexico.

For more information : <http://gc21.inwent.org/ibt/GC21/>

An Interactive Portal Seeking to Boost Tourism



Interactive portal showing the tourism supply in Santander

To boost the tourism industry in the Colombian city of Santander, the Chamber of Commerce of Bucaramanga, supported by the EU through the AL-INVEST IV Program, has launched the first interactive portal showing the range of the tourism supply in Santander.

This initiative was presented last May 18 to representatives from different companies and institutions connected to tourism in the region.

The executive president of the Chamber of Commerce of Bucaramanga, Juan Camilo Beltrán Domínguez, stated that this entity promoting development in Santander sees great economic opportunities in the tourism industry for some nearby regions. Therefore, a set of actions seeking to attain this goal are underway. One of them is launching this portal.

For more information: www.visitasantander.com

Corporate Planning, Management and Finance Course

Through the AL-INVEST IV Program and supported by the Brazilian Network of International Business Centers, over 50 Brazilian business people participated last March 24 and 25 in planning, management and corporate finance courses.

Professors David Camino, PhD in Business Administration and Economics and Director of the Law and Economics Institute of the Universidad Carlos III of Madrid and Alexander Zak, PhD in System Engineering and Professor at Duke Corporate University in London, lectured on potential improvements to the management systems of companies, seeking to adapt them to the new challenges of global competition and foreign markets.

In a dynamic, participatory environment, attendants were able to learn about different management options and to further improve their skills thanks to the strategic information that eases the decision making process.



Business course participants

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Coming up

Events

Academy in Latin America- Lima, Peru June 22, 2011- June 26, 2011 (SC)

Annual Meeting – Coordination and Services Consortium - Cartagena de Indias, Colombia - July 19, 2011 (SC)

Reunión Anual AL-INVEST, Cartagena de Indias, Colombia July 20, 2011 - July 22, 2011 (SC)

SIAL MERCOSUR September 01, 2011 - September 02, 2011 (SC)

SIMM Madrid September 01, 2011 - September 03, 2011 (SC)

ANUGA 2011- Colonia October 08, 2011 - October 12, 2011 (SC)

Social Responsibility of SMEs
October 20, 2011 - October 21, 2011 (SC)

FIMMA-Maderalia Valencia 2011
October 25, 2011 – October 28, 2011 (SC)

Academy in Europe (tentative dates) November 2011 (SC)

Contact

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<http://www.facebook.com/pages/AL-Invest-IV-Consortio-de-Servicios/175340069146180?ref=ts>



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Share your comments!



Publications

Sectorial analysis "Fishing":

<http://www.al-invest4.eu/pesca/>

Sectorial analysis "Aquaculture":

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"The AL-INVEST IV Program is one of the most relevant regional economic cooperation programs of the European Commission in Latin America. The main goal of the IVth phase of the Program is to promote social cohesion by supporting Latin American SMEs in their consolidation and internationalization, sharing innovation and knowledge and creating economic relations with their European counterparts".