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## Egypt

### Exporter Guide

### Annual

### 2004

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**Report Highlights:**

Egypt has a population of 70 million with an annual growth of 2.02 percent. Egyptian consumers are increasingly becoming aware of the quality and variety of imported consumer-oriented products. The Government of Egypt (GOE) issued a presidential decree on September 8, 2004, reducing its import tariffs on many of its agricultural and food products.

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## SECTION I: MARKET OVERVIEW

### 1.1 Economic Situation

In compliance with its World Trade Organization (WTO) tariff binding commitment, the Government of Egypt (GOE) issued a presidential decree on September 8, 2004 reducing its import tariffs on many of its agricultural and food products, fertilizers and agricultural tractors (see appendix IV). Egypt's tariff rates for many products have been relatively high. Under its WTO agreement, the GOE agreed to cut its tariffs an average of 24 percent over a ten-year period. The lowered tariffs are expected to lead to reduce prices for the effected commodities in the Egyptian market. U.S. products can benefit from these changes, especially poultry, which now has a tariff of 32 percent instead of 80 percent.

The European Union and Egypt signed a partnership agreement on June 24, 2001 whereby import tariffs on most products, including agricultural products are to be cut substantially, or eliminated over the next 12-15 years. Both Egyptian and European exporters of various agricultural commodities will gain substantial benefits from the Agreement. The EU 15 countries' total exports to Egypt increased from 5.8 billion Euros in 1996 to a record level of 7.8 billion Euros in 2000. The EU-Egypt Partnership agreement may disadvantage U.S. agricultural products in the market, particularly value added products.

### 1.2 Demographic Developments

Egypt has a population of about 70 million with an annual growth rate of 2.03 percent. Many in the private sector estimate the unemployment rate to be about 20 percent.

### 1.3 Consumer Buying & Eating Habits

Egyptian consumers are increasingly more aware of the quality and variety of consumer-oriented products. As a result, Egyptian consumers' buying habits are changing dramatically. For example, in the past, Egyptian consumers bought products, such as meat, fresh fruits, and vegetables from small neighborhood shops. However, with the increasing number of supermarkets and hypermarkets in Cairo and Alexandria and services offered in one place, many middle to high-income consumers have begun to purchase most of their food requirements from supermarkets. Also, with changing eating habits, expansion of fast food chains, local restaurants and resorts, there is good potential for imported products.

### 1.4 The Market for U.S. Products

In 2003, total U.S. imports for consumer-oriented products totaled \$41.2 million compared to \$42 million in 2002. This decrease is attributed to the current political situation in the Middle East and the fluctuation of the foreign exchange rate. Due to negative sentiments about the war in Iraq and the Palestinian-Israeli conflict, the climate for marketing American consumer-ready food products in Egypt is difficult. Major importers reported a decrease of 30 percent in sales as a result of these conditions. Some of the major importers of U.S. consumer-oriented products are beginning to look for alternative supply channels particularly in the EU. Others who have invested much effort in promoting American brands are hoping that the situation will improve soon.

The U.S., South Africa and European countries, mainly France, Spain, Italy, Germany, Greece, Holland and Denmark are dominant suppliers of consumer-ready products to Egypt.

Egypt maintains many trade barriers including abrupt rule changes, non-transparent regulations and stringent product labeling requirements. Egypt frequently applies reference prices, for tariff purposes, on a number of products as well as extremely high tariffs for a few products, such as alcoholic beverages.

The following is a summary of the advantages and challenges facing U.S. agricultural exporters in Egypt.

ADVANTAGES	CHALLENGES
With the growing number and expansion of supermarket chains, hypermarkets and the presence of international chains, such as Carrefour (French), Shoprite (South African) and Mono Prix (soon to open), the market opportunities for new-to-market products will increase.	The EU-Egypt Partnership Agreement may disadvantage US agricultural products in the market, particularly value added products unless positive trade policy changes can be made between the U.S. and Egypt in the future.  Egyptian import regulations and labeling requirements are too stringent.
There has been tremendous growth of hotels and restaurants that cater to tourists.	Many importers report there is a lack of U.S. suppliers' interest in the Egyptian market.
U.S. products are perceived as "high quality products."	Political conditions in the region are not conducive for marketing activities that highlight U.S. products

## SECTION II EXPORTER BUSINESS TIPS

### Local Customs

On July 25, 2001, the GOE issued Ministerial Decree 765 on the determination of the value of good for customs purposes in an attempt to comply with its WTO obligations under the Customs Valuation Agreement. This decree updated customs law number 66 of 1963 to reflect implementation of the WTO Customs Valuation Agreement.

Chapter Two, Article One, Paragraph One, states that " The value for customs purposes shall be the actual value of the deal, or the price actually paid or to be paid as indicated in the purchase contracts, the invoices, and other documents concerning the deal, providing they shall be approved or accepted by the Customs Department." However, independent experts who studied the law and compared it to the WTO Valuation Agreement, found that Decree 765 fell short in two important areas: the definition of "actual value" of imported goods and the Customs Authority's continued right to reject the importer's declared price based on its variance from similar, or identical goods.

The law states that "if the Customs Department is not convinced of the validity of the value as declared, even after submission of the additional documents, Customs may refuse to accept the value of the deal. This provides Customs with a basis for continuing to use a reference price or minimum valuation system, which is prohibited under the WTO. Some importers report that there is nothing new in the way Customs does its business following the implementation of the law. Reportedly, the Customs Department still uses reference prices for valuation purposes. When there is a dispute between the Customs Department and importers on the value of the commodity, importers have a right to go to arbitration, but most importers prefer to pay a "settlement price", which is higher than the declared price in order to avoid associated delays and costs. In sum, it appears that the use of reference

prices is still in use despite the government's attempt to comply with the WTO rules on customs valuation. Reference prices are frequently applied to imports of a wide range of products, including meat, apples, nuts, poultry, sugar and other products.

### **Consumer Taste and Preference**

The food service industry is expanding and consumers' habits are changing. Dining outside the home is becoming more popular. The number of working women outside the home is growing, and the number of dual income families is increasing. Restaurants, hotels and resorts are expanding not only in Cairo but also on the Red Sea Coast and the Sinai. The American fast-food chains dominate the market. At present, thirty American fast food franchisers, such as A&W, Chili's, Fuddruckers, Hard Rock Café, KFC, Kenny Rogers, Little Caesars, Pizza Hut, McDonalds, Quiznos and TGI Fridays operate in Egypt.

Consumers in Cairo, Alexandria, and the Red Sea area are more aware of international trends in food. Middle and upper-middle income shoppers are drawn to supermarket chains.

### **Food Standards and Regulations**

The Egyptian Organization for Standardization and Quality Control (EOS) in the Ministry of Foreign Trade and Industry has sole responsibility for establishing, adopting and publishing food standards and codes of practice. If no mandatory Egyptian standard exists, the following could be applied: Egyptian product standards; International Standards (ISO/IEC); European Standards (EN); American Standards (ANS); Japanese Standards; and Codex Standards. Egyptian authorities are more strict in enforcing product standards on imported food products than on locally produced food products.

It is mandatory that colors used on internal and external packaging not be harmful to human health. Decree 73 of 2001 issued by the Ministry of Health also confirmed that all food wrappings should be suitable for the product and usage. The package must NOT produce toxic substances or any harmful compounds that may lead to coloration of contents or cause damage to the foodstuff. Ink is prohibited to be used on the internal surface or packages. However, external surfaces may be painted with safe and durable inks according to handling circumstances, provided that such materials are approved for use and that the painting material does not permeate to the foodstuff. For products, such as butter and ice cream, it is imperative to isolate the colored layer from the external surface in a manner that ensures non-penetration of the color to the foodstuff.

In February 2000, Presidential Decree No. 106 was issued to centralize the process of inspection and certification of imported goods under the General Organization for Export/Import Control (GOEIC), Ministry of Foreign Trade and Industry. In the past, there were five government entities involved in the import clearance process. With the new decree, inspection will only be done through GOEIC. However, there are representatives from other ministries such as, the Ministry of Agriculture and the Ministry of Health who also monitor the inspection process. Release Certificates are not issued by GOEIC unless all authorities approve the consignment.

Egypt requires restrictive labeling for imports of food products. With the exception of the production and expiration dates, information in English only (or other foreign language) is not allowed. Dates are accepted in English, but the words "Production" and "Expiry" must be written in Arabic. Arabic language is mandatory. Labels can be printed on the package or be of a permanent adhesive type. Products are not allowed to show more than one date of manufacture or expiration on the package. For example, goods have been rejected if the inside package has a different date than the outside carton. Information on the label cannot

be erased, scratched, or altered in any way. Requirements are more restrictive for meat and poultry products. In November 1997, the Ministry of Trade issued Decree No. 465 which calls for the insertion of labels inside the packaging of imported products, including information on the name and address of each importer in Arabic. This requirement necessitates separate production procedures for products destined for the Egyptian market which increases production costs and limits marketing options for U.S. exporters. This also leads to higher prices for Egyptian consumers.

A lower cost procedure providing full protection would be to permit the inside label to have the U.S. manufacturing facility and production date in English and require other information in Arabic (importer's name etc.) on a stick-on label on the outside of the package.

Amending information on the label is permitted, but amendments must be done inside the customs authority. Amendments can be done for some types of information by a sticker. However, if dates need to be amended, it must be printed on the package (outer and inner package). Amended stickers for dates are not acceptable.

Import regulations are routinely developed and enforced without prior notice. This makes Egypt a very risky place to do business. Also, Egypt has mandatory standards for a number of quality characteristics, moving beyond restrictions imposed for health and safety reasons. These standards such as fat content in meat or brix on fruit juice are unnecessary and their existence coupled with arbitrary enforcement lends credence to Egypt's reputation as one of the most difficult countries in the world in which to do business. This excessive regulation is unfair to trading partners, raises costs to Egyptian consumers, and discourages investment in Egypt.

Import regulations require that foodstuffs be packed in containers, suitable to the nature and type of commodity, to be clean, sound and free of bad smell, to be kept in good condition. Also, the consignment should be symmetric in weight and package. The following information should be written on each package in Arabic not liable to deletion:

- Name of producer and trade mark; if any
- Country of origin
- Type of product and grade
- Name and address of importer
- Production and expiration date
- Product use instructions (optional)
- Product ingredients
- Storage instructions or temperature
- Net weight
- Gross weight and total number of packages per case or carton
- If the product contains preservatives, the percentage of each preservative should be indicated
- If the product is meat or poultry, the following statement must appear:  
"Slaughtered according to the Islamic ritual" or "halal slaughtered"

Egyptian shelf-life requirements for food products differ in many respects from the standards used by other countries. "Best-Used-By" dates are not acceptable in Egypt. Egyptian shelf-life standards ignore quality difference between producers and are often established without scientific basis.

For more information on Egypt's import requirements, please refer to FAS/Cairo, Food and Agricultural Import Regulations and Standards (FAIRS) / EG 2026 available on the FAS web site [www.fas.usda.gov](http://www.fas.usda.gov)

## General Tips to Exporters

- Egyptian importers often complain that U.S. suppliers are not informed about local market conditions and requirements. U.S. exporters should closely consult with importers to ensure that Egyptian import requirements are met in order to avoid unnecessary delays at customs.
- Consider visiting Egypt. U.S. suppliers who are interested in doing business in Egypt are encouraged to visit Egypt in order to better understand the potential of the market.
- Production and expiry dates are mandatory and Arabic/English labels or stickers are required. A thorough report on Food and Agricultural Import Regulations and Standards (FAIRS) Report is accessible via the FAS On-Line web site: [www.fas.usda.gov](http://www.fas.usda.gov). ([Attache Reports](#))
- Encourage and assist your local agent or distributor. Egyptian importers can promote your products. They can use various tools, such as free samples, advertising, in-store displays, and price discounts during promotional activities.
- Target reliable importers. Contact FAS/Cairo to obtain a list of local importers; Tel: 011 (2-02) 797-2388 / 2389; Fax: 011 (2-02) 796-3989; E-mail: [AgCairo@usda.gov](mailto:AgCairo@usda.gov).
- Advertisements. Television advertising is expensive. However, advertisement in monthly magazines is effective when targeting a specific audience. Also, there are specific magazines for hotels and restaurants.
- Consider participating in FAS Cairo organized or sponsored events. FAS Cairo normally organizes a variety of market development activities including in-store promotions, trade shows, cooking demonstrations in cooperation with Egyptian importers, retailers, hotels, restaurants, institutions and companies. For more information, please contact FAS Cairo on how to participate.
- Be ready to accept smaller than normal orders or share a shipment with other suppliers. Local importers tend to purchase small quantities to introduce new-to-market products until they are confident that the product has market potential.

## SECTION III: MARKET SECTOR STRUCTURE AND TRENDS

### 1. RETAIL FOOD SECTOR

Egyptian consumers have an increasing demand for quality and variety. Demand for consumer ready products is trending upward due to the expansion of local supermarket chains and multi-national firms investing in Egypt, such as Carrefour and Shoprite. This is attributed to the fact that Egyptian buying habits are changing dramatically. In 2003, U.S. consumer-oriented products imports totaled \$42 million.

In the retail food sector, products are imported by an importer or an agent who may also be a wholesaler and/or a distributor. There are three supermarket chains which import food products directly. The market for consumer-ready food products are concentrated in Cairo (16 million) and Alexandria (5 million). However, Metro, the largest local supermarket chain is expanding into the Red Sea area and other governorates.

For more detailed description of Egypt's retail food market, please refer to FAS/Cairo global Agriculture Information Network (GAIN) Report No. EG1032 available via FAS web site [www.fas.usda.gov](http://www.fas.usda.gov)

## 2. H.R.I. SECTOR

The food service industry is expanding, and consumers' habits are changing. For example, total number of hotels in Sharm El Sheikh (Red Sea Resort) is currently 169 hotels. The Egyptian Government continues to encourage investment in hotels, and tourist resorts. The hotels are price sensitive. Imports from Europe, New Zealand, and Canada represent 91 percent compared to 9 percent from the U.S. Among products imported for hotels are high quality beef, seafood (lobsters & soft crabs), sauces, canned vegetables and fruits, Tex Mex products and beef liver. Volume of meat imports may increase substantially if government requirements are simplified and the seven percent fat content requirement on beef imports is abolished.

American-style food chains are becoming increasingly popular in Egypt, providing consumers with a wide range of choices. The current political climate in the region and devaluation of the pound are having a negative impact on the economy particularly on imports. Some food franchisees are reporting a decrease of 30 percent in revenue as a result of these conditions.

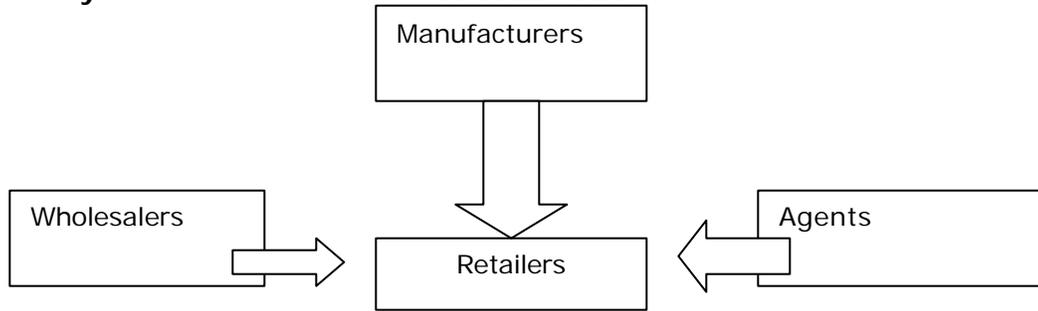
## 3. FOOD PROCESSING

The processed food sector is one of the key economic sectors in Egypt. Its contribution to value added, employment and exports is high and increasing. The Arab countries, particularly the Gulf States are traditional export markets for Egypt's canned and frozen food products. European Union countries, and to a lesser extent the United States and Asian markets are also potential markets for Egyptian processed food products. About 25 percent of the processing sector is located in Cairo and Alexandria with 40 percent of the total manpower employed.

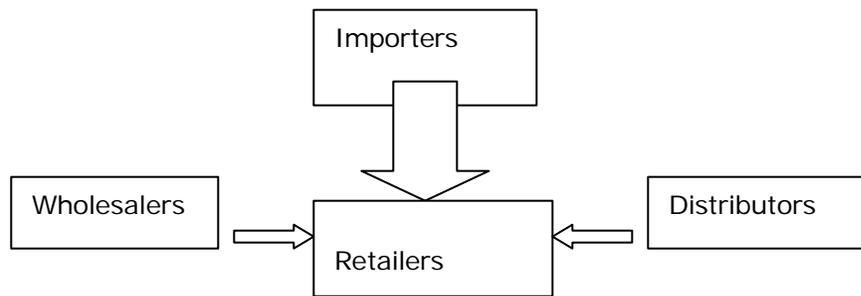
Following are some highlights on the different product sectors:

- Dairy product facilities represent about 9 percent of the overall food sector.
- The production of sweets and confectionery products depends heavily on imported sugar, cocoa, beans, oils, fats, coconut milk, nuts and dried fruits.
- Fruits and vegetables constitute a substantial resource base for the production of a wide range of beverages although the production of several varieties of soft drinks is based on imported ingredients. Egyptian production of beverages includes mineral and bottled waters, soft drinks, and the processing and packaging of imported tea and coffee as well as alcoholic products such as beer, wine, brandy, rum and ouzo.

**Distribution System for Processed Food Products in the Market**



**Distribution System for Imported Products in the Market**



**SECTION IV: BEST HIGH VALUE PRODUCT PROSPECTS**

Dressings, sauces, and seasonings

Spices

Apples

Nuts and dried fruit

Mexican food items

High quality beef (provided that BSE, labeling & fat content issues are resolved)

Cheese

Speciality flour

Seafood (lobsters & soft Crabs)

Chocolates (as raw material for bakery and pastry)

**SECTION V: KEY CONTACTS AND FURTHER INFORMATION**

U.S. Mailing Address: Office of Agricultural Affairs  
Unit 64900, Box 22  
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Internet Homepage: [www.usembassy.egnet.net/agricult.htm](http://www.usembassy.egnet.net/agricult.htm)

**PERTINENT GOVERNMENT FOOD IMPORT CONTACTS****MINISTRY OF AGRICULTURE**

Contact: **Dr. Salah El Din Sharaf**  
Undersecretary for Agricultural Quarantine  
Tel: (20-2) 336-3582  
Fax: (20-2) 337-2881 / 336-1727

**Dr. Rabie Saber Eid**  
Undersecretary for Veterinary Quarantine  
Tel: (20-2) 336-1727  
Fax: (20-2) 337-2881

**GENERAL ORGANIZATION FOR EXPORT AND IMPORT CONTROL (GOEIC),  
MINISTRY OF FOREIGN TRADE AND INDUSTRY**

Contact: **General Mohamed Abdel Hamid El Banaa**  
Chairman  
Tel: (20-2) 575-6130 / 6095  
Fax: (20-2) 576-6971 / 575-8195

**Eng. Raghieb Hozaien**  
Undersecretary for Import Control for Food Imports  
Tel: (20-2) 574-1654  
Fax: (20-2) 575-8195

**MINISTRY OF HEALTH & POPULATION**

Contact: **Dr. Zeinab Abdel Halim**  
Director of Food Safety and Control Division  
Food and Quality Control  
Tel: (20-2) 794-8152  
Fax: (20-2) 794-8152

**CENTRAL HEALTH LABORATORY**

Address: 19 El Sheikh Rihan Street  
Cairo, Egypt  
Tel: (20-2) 794-7271 / 2 / 3  
Fax: (20-2) 796-2248

Contact: **Dr. Magda Ali Rakha**  
First Undersecretary for Central Health Laboratory

**FOOD INSTITUTE**

Contact: **Dr. Hoda Abdel Fattah Hassan**  
Chairman  
Dr. Reda El Sherbiny  
Food Hygiene, Food Institute  
Tel: (20-2) 364-6413 / 3522  
Fax: (20-2) 364-7476

**EGYPTIAN ORGANIZATION FOR STANDARDIZATION & QUALITY CONTROL (EOS)**

Contact: **Dr. Eng. Mahmoud Eisa**  
Chairman  
Tel: (20-2) 603-1349 / 259-3480  
Fax: (20-2) 603-1351

**Appendix I: Key Trade and Demographic Information**

Total Imports (billion)	\$11.98
Total Agricultural Imports (billion)	\$2.8
Total Agricultural Imports as a percent of Total Imports	23 percent
Total Agricultural Imports from the U.S. (billion)	\$1,007
Total Consumer Oriented Products from U.S. (million)	\$41.2
U.S. Ag. Market Share	36 percent
Population (million)	69.2
Population Growth	1.99
Inflation Rate	4 percent *
Agriculture's Contribution to GDP	16.6 percent
Exchange Rate	(US\$ 1 = L.E. 6.20) on September 30, 2004

\* However, according to the wholesale price, the inflation rate is 18.5%.

Source:       - Central Agency for Public Mobilization and Statistics (CAPMAS)  
              - Information and Decision Support Center (IDSC)  
              - UN Trade Data

## Appendix II: Total Consumer-Oriented Products Imports

PRODUCT	2003 (VALUE)			2002 (VALUE)		
	WORLD	U.S.	US SHARE	WORLD	U.S.	US SHARE
FRESH VEGETABLES	1,656,635	0	0%	2,964,167	0%	0%
FROZEN VEGETABLES	-----	-----	-----	4,482,940	0%	0%
DRIED VEGETABLES	9,961,372	136,818	1%	15,163,857	297,519	2%
NUTS	8,820,115	2,330,018	26%	11,924,865	2,582,107	22%
FRESH FRUIT	16,329,101	2,226,387	14%	1,614,873	33,567	2%
APPLES	14,416,939	2,193,442	15%	18,377,459	3,574,182	19%
DRIED FRUIT	2,173,885	36,766	20%	8,943,397	223,036	2%
COFFEE	6,306,337	65,010	1%	6,369,387	11,746	0%
SPICES	6,961,402	-----	0%	428,460	0	0%
BEEF CANNED (RED MEAT PREPARED)	2,645,581	22,143	1%	1,783,510	0	0%
RED MEAT (FRESH, CHILLED, FROZEN)	150,453,207	1,828,521		191,419,592	156,034	0%
BOVINE, OFFALS FROZEN	35,508,805	35,490,316	100%	34,276,728	34,169,474	100%
FROZEN FISH	61,164,501	2,018	0%	64,070,544	3,135,755	5%
BISCUIT /BREAD/WAFFLES	2,158,070	184,280	9%	3,729,473	984,798	26%
JAMS	5,458,983	-----	-----	316,621	49,259	16%
JUICES	1,215,330	31,346	3%	1,222,398	89,298	7%
SAUCES / MAYONNAISE / KETCHUP	599,350	201,212	34%	806,375	299,658	37%
ICE CREAM	755,415	2,901	0%	974,029	205,044	21%
JELLY	72,653	36,284	50%	0	0	
BEER	0.866	0	0%	11,887	0	0%
WINE	116,803	78,347	67%	204,127	16,825	8%
PET FOOD	1,477,218	565,988	38%	1,209,008	152,522	13%
PASTAS	593,339	27,736	5%	892,919	4,199	0%
CHEESE	17,975,343	290,841	2%	22,652,069	230,755	1%
BUTTER	57,746,202	0	0%	65,801,264	0	0%
MILK POWDER	42,153,619	0.256	0%	33,837,190	1,600,713	5%
PASTEURIZED EGGS	100,129	10,032	100%	152,413	42,703	28%

Source: Central Agency for Public Mobilization and Statistics (CAPMAS)

## Appendix III: Suppliers for Consumer-Oriented Products

<b>SUPPLIERS OF CONSUMER FOODS AND EDIBLE FISHERY PRODUCTS (CY 2003)</b>			
<b>PRODUCT</b>	<b>LARGEST SUPPLIERS</b>	<b>MARKET SHARE (%)</b>	<b>U.S. MARKET SHARE (%)</b>
Fresh Veg.	China	95%	0 %
Fresh Fruit	Lebanon Syria	41% 16%	14%
Dried Fruit	Turkey France	60% 14%	1%
Nuts	Turkey India	34% 21%	26%
Coffee	Indonesia Brazil China Italy	48% 16% 13% 4%	1%
Spices	Vietnam Singapore Sri Lanka	43% 15% 11%	1%
Red Meat Prepared	Brazil	93%	0%
Red Meat (fresh, chilled, frozen)	Brazil	71%	0%
Bovine, offals frozen	-----	-----	100%
Frozen Fish	Netherlands Mauritania Ireland United Kingdom	46% 13% 12% 8%	0%

<i>PRODUCT</i>	<i>LARGEST SUPPLIERS</i>	<i>MARKET SHARE (%)</i>	<i>U.S. MARKET SHARE (%)</i>
Other Food Preparations	Ireland Turkey Germany	15% 11% 7%	18%
Jams	Syria	84%	0%
Juices	Spain Cyprus Denmark	59% 4% 4%	3%
Sauces / Mayonnaise / Ketchup	India Oman Netherlands	19% 9% 8%	34%
Ice Cream	France Mexico	69% 17%	0%
Beer	Netherlands	100%	0%
Wine	EEC France	68% 8%	10%
Pet Food	Germany Australia	11% 8%	38%
Pastas	Indonesia Italy	33% 28%	5%
Cheese	Netherlands Denmark New Zealand France	47% 6% 9% 2%	0%
Butter	New Zealand Netherlands Australia	50% 16% 11%	0%
Pasteurized Eggs	Germany Italy	56% 17%	10%

## Appendix IV: New Tariff Rates

<i>Product</i>	<i>Before</i>	<i>After</i>
Poultry	80%	32%
Fats and tallow	40%	22%
Shrimp and lobster	30%	5%
Milk	30%	5%
Cream	40%	32%
Cheese	30%	22%
Legumes	20%	5%
Chick peas and garbanzo	20%	5%
Nuts (almonds, cashews, hazelnuts, walnuts)	30%	12%
Dried apricots	40%	22%
Dried plums	40%	22%
Tea	30%	5%
Vanilla, Anise, nutmeg	20%	5%
Raw sugar	5%	2%
Prepared soy oil	20%	12%
Prepared palm oil	20%	12%
Salmon	10%	5%
Tuna	10%	5%
Chocolate	40%	32%
Cocoa	20%	5%
Hard and softwood	8%	5%
Block boards (covered)	43%	12%
Block boards (uncovered)	30%	12%
Plywood	33%	12%
Veneer	15%	5%
Fertilizers	8-33%	2%
Agricultural tractors	13-33%	5%
Tires of agricultural tractors	33%	5%
Spare parts for agricultural tractors	13-30%	2%