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Israel

Exporter Guide

Annual

2006

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Report Highlights:

A thriving retail sector and strong institutional buyers makes Israel a promising market for U.S. exporters of high-value food products. In addition, solid economic growth is maintaining firm overall demand. To take advantage of these opportunities, U.S. exporters should consider participating in food exhibitions in Israel, and also be familiar with import regulations and guidelines.

Includes PSD Changes: No
Includes Trade Matrix: No
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Tel Aviv [IS1]
[IS]

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Section I: Market Overview

Economic and Demographic Situation

All in all, most economic indices indicate an improving economy. Economic growth in 2005 totaled 5.2 percent, and per capita gross domestic product (GDP) increased 3.3 percent to \$17,800. In 2005, population totaled 7 million. The annual population growth rate was 1.8 percent. In December 2005, unemployment totaled 8.8 percent, a 10 percent decrease from December 2004 (9.8 percent). The inflation rate was 2.4 percent. The annual average per capita income stands at \$20,980. In 2005, total private consumption rose by 3.9 percent.

In 1985, Israel signed a Free Trade Area Agreement (FTAA) with the United States. Since 1995, nearly all tariffs on trade between the two countries have been eliminated. Israel also has free trade agreements with Canada, Bulgaria, EFTA, Jordan, Romania, Turkey, Mexico, and the European Union. Israel has a customs union with the Palestinian Authority. As a member of the World Trade Organization (WTO), Israel implemented the WTO Customs Valuation Agreement that requires legislation to eliminate non-tariff barriers.

Israel Food Processing Industry

In CY 2005, the value of the Israeli food processing industry, including beverages, beer and tobacco, was estimated at \$9.35 billion, a 3.2 percent increase compared to the previous year (\$9.06 billion). Growth over the next few years is expected vary between 1-3 percent annually. An estimated 1,000 companies make up the local food processing industry, many of them quite small. Out of the total, 150 companies produce approximately 90 percent of the total value. Most processing facilities are located in rural areas. Low salaries and high subsidies from the Israeli government granted to investors in these areas attract this sector. For further information, see Israeli Food Processing Sector Report:

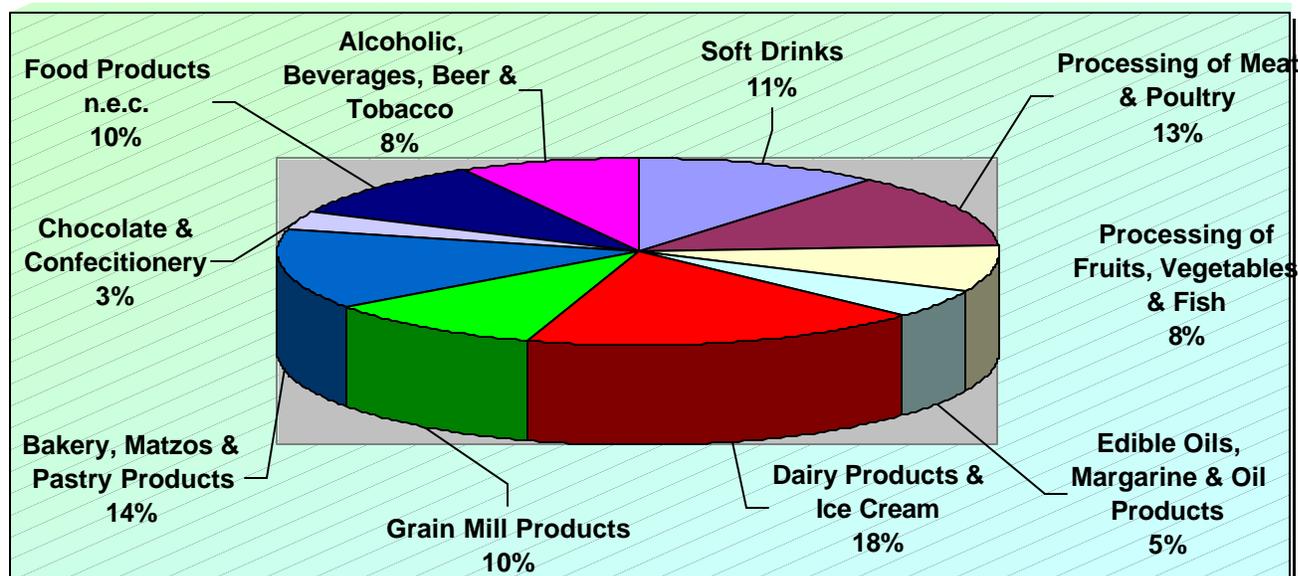
<http://www.fas.usda.gov/gainfiles/200603/146176957.pdf>

Table 1: Israeli Food, Beverages and Tobacco Processing Industry Value, \$¹ Billion, Nominal Terms

CY	Value	Percent Change Compared to Previous Year
2001	\$7.92	
2002	\$8.44	6.62
2003	\$8.71	3.17
2004	\$9.06	4.00
2005	\$9.35	3.20

Source: The Food Industries Association, Manufactures' Association of Israel

¹ Exchange Rate, 1 USA Dollar=4.5 NIS

Chart 1: Israeli Food Processing Industry Value, by Sub-Sectors, Percent, CY 2005

Source: The Food Industries Association, Manufacturers' Association of Israel

Consumer Buying and Eating Habits

The monthly household consumption expenditure in 2005 totaled \$2,403, of which 16.3 percent (\$392) was directed to food purchases and consumption. Approximately 40 percent of food purchases occur on Thursdays and Fridays. When buying food, Israelis are quality oriented and are ready to pay a premium for quality food products. Consumers are acquainted with American products and wish to have more of them available. During the last decade, an increasing share of consumers prefer to buy their products through supermarket chains compared to the traditional channels of open markets and small grocery stores.

Except for meat, Kosher certification is not an obligatory requirement for importing food into Israel. However, non-kosher products have a much smaller market share as the large supermarket chains and hotels refuse to carry them. About two-thirds of consumers buy kosher food products.

Table 1: Monthly Household Consumption Expenditure, \$, CY 2004

	Value	Percent
Consumption Expenditure - total	\$2,320	
Bread, Cereals and Pastry Products	\$55.0	14.9%
Vegetable Oils and Products	\$7.4	3.0%
Meat and Poultry	\$59.3	14.2%
Seafood	\$11.9	3.1%
Milk, Milk Products and Eggs	\$56.7	4.5%

Sugar and Products	\$12.5	1.6%
Soft Drinks	\$17.8	7.4%
Alcoholic Beverages	\$6.3	18.5%
Miscellaneous Food Products	\$29.5	3.0%
Fresh Vegetables & Fruits	\$74.0	1.7%
Frozen & Pickled Vegetables	\$11.9	0.6%
Dried Fruit	\$6.9	12.0%
Fruit Juices, natural	\$2.2	14.9%
Meals away from home	\$47.8	3.0%
Food - total	\$399.2	100.0%

Source: Household Expenditure Survey, 2004, CBS.

Table 2: Food- Household Purchase by Outlet Type - % of Total Expenditure (Excl. Meals Away From Home), 2004

	Grocery Stores	Open Markets	Supermarket Chains	Others
Food - Total	20.7	7.2	51.7	20.4
Bread, Cereals and Pastry Products	26.0	2.4	53.3	18.3
Vegetable Oils and Products	26.7	8.9	54.6	9.8
Meat and Poultry	8.9	4.9	44.3	41.9
Fish	10.2	11.9	45.1	32.8
Milk, Milk Products and Eggs	34.3	1.9	59.9	3.9
Sugar and Products	23.7	3.8	58.0	14.5
Soft Drinks and Alcoholic Beverages	30.1	2.1	58.6	9.2
Fresh Vegetables	8.4	26.3	35.4	29.9
Fresh Fruits	7.5	26.1	35.4	31.0
Frozen & Pickled Vegetables	21.2	3.2	70.2	5.4
Dried Fruit	22.7	17.0	47.8	12.5

Source: Household Expenditure Survey, 2004, CBS.

Trade and the Market for U.S. Products and Services

Israel is the twenty-first largest export market for all U.S. products and services. In 2005, approximately \$21.5 billion in two-way trade was recorded, a 6.2 percent increase compared to the previous year. Although the European Union (EU) is Israel's largest trade partner, the United States is Israel's largest single country trade partner.

In 1996, Israel and the United States signed a five-year Agreement on Trade in Agricultural Products (ATAP), in which Israel was allowed to protect a number of sensitive crops and livestock products with a combination of tariff-rate quotas and relatively high duties.

In 2005, agricultural and processed foods imports to Israel totaled \$2.55 billion, 1.8 percent down from previous year levels (see annex 1). Out of total agricultural imports, \$382 million (15 percent) were from the United States and \$1.07 billion (42 percent) from the EU. Imports of agricultural and food products from relatively new sources such as Eastern Europe, Turkey and the Far East, are expanding at the expense of existing sources.

Table 9: Opportunities and Challenges for U.S. Exporters to Israel

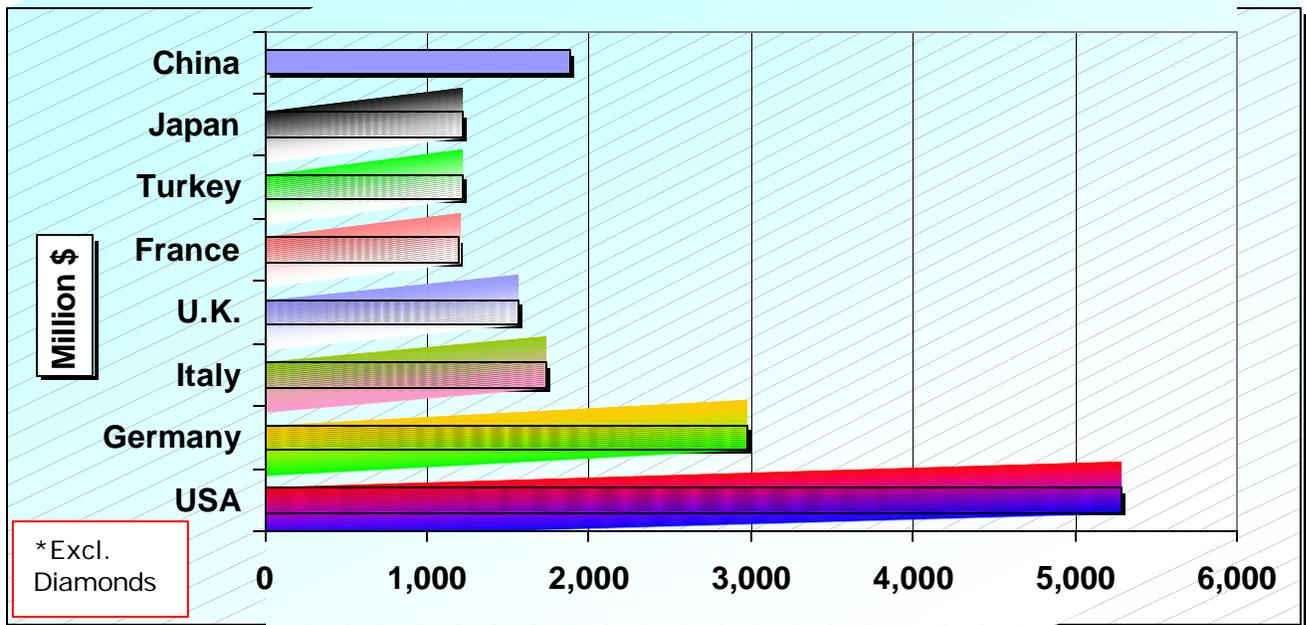
Opportunities	Challenges
The current exchange rate between the U.S. dollar and the euro continues to favor U.S. suppliers, as European products become more expensive.	Shipping costs from the U.S. are higher.
There is tremendous growth in the number of food stores (supermarkets, grocery stores, 24-hour convenience stores), and restaurants.	Growing competition exists from Eastern Europe, Turkey, Former Soviet Union, South America and the Far East. Products from those areas are cheaper than products from the U.S. and EU and the quality is steadily improving.
The Israeli consumer appreciates American products and they are in demand.	Religious restrictions on food ingredients, eg: non-kosher meat, poultry and pork.
Israel has the potential to be a "bridge" to the Palestinian Authority with its rapidly growing population.	U.S. suppliers' interest in the Israeli market is still low.
Agricultural trade agreement between the U.S. and Israel.	Israeli buyers unfamiliar with U.S. suppliers and products.
	U.S. exporters lack knowledge of the Israeli market and are unaware of new opportunities.

Table 4: Imports, by Regions², \$ Million

CY	Months	Total	EU	USA	Asia	Other
2005	1-7	20,451.7	7,667.4	3,228.3	3,658.3	5,897.7
2006	1-7	22,087.7	8,290.0	2,968.6	4,134.3	6,694.8
Percent Change		+8.0%	+8.1%	-8.0%	+13.0%	+13.5%

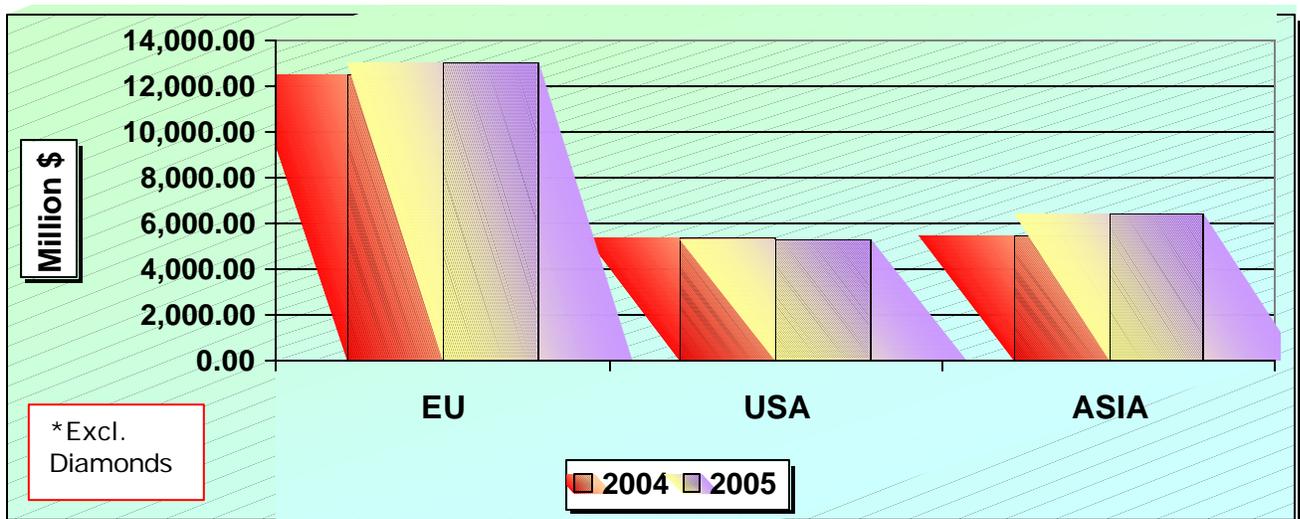
Source: Central Bureau of Statistics

Chart 1: Total Imports, by Major Countries, CY 2005



Source: CBS, Foreign Trade Statistics, 2005.

Chart 2: Imports by Regions, CY 2003-2005



Source: CBS, Foreign Trade Statistics, Different Years.

² Excl. diamonds

Section II: Exporter Business Tips

Local Business Customs:

1. Customs Valuation and Taxes

Israel has implemented the WTO Customs Valuation Agreement, effectively eliminating most non-tariff barriers. Under WTO regulations, the basis for valuation is the transaction value, in most cases the CIF price.

2. Value Added Tax and Purchase Tax

According to an order signed by the Minister of Finance, the VAT rate was reduced from 16.5 percent to 15.5 percent, effective from July 1, 2006, and applying to all transactions and import of goods whose date of liability to tax applies beginning from July 1, 2006.

The VAT on imports is levied on the CIF landed cost plus purchase tax. VAT is recovered by the importer upon resale of the goods and is ultimately paid by the consumer. Israel levies purchase taxes on many consumer goods. The GOI reduced or eliminated the tax on more than 600 items in 2000, including televisions, washing machines, electrical appliances and cosmetics. Rates that had ranged from 25-85 percent were reduced to 5-45 percent. Purchase taxes of up to 90 percent on motor vehicles, fuel, tobacco and liquor were left unchanged.

Consumer Taste and Preference

The food service industry is expanding and consumers' habits are changing. Over the last few years, Israelis have begun to dine out more frequently and choose premium food when doing so. Approximately 20 percent of Israel's 7 million people are concentrated in the Tel Aviv district, Israel's commercial and financial center. Other major concentrations of the population are the Haifa area (15 percent), a major port city and center for the petrochemical industry, and Jerusalem (12 percent). While most companies are headquartered in the Tel Aviv or Haifa metropolitan areas, a growing number of firms maintain branches, showrooms, or service facilities in Jerusalem and Beer Sheva.

Consumer malls and shopping centers are popular in Israel. Over 200 malls exist and others are planned. Many American specialty shops, chain stores, and franchises have outlets in malls and shopping centers. The key to success is offering an increasing variety of new products and services to the consumer.

The institutional services, including the army, hospitals, hotels, restaurants, banquet halls and places of employment, account for 30 percent of the total market share (households and institutional). Over 50 percent of the total food supply directed at non-institutional consumers is sold through supermarkets and retail chains. Two major supermarket chains with hundreds of outlets throughout the country dominate the retail food market. The average floor size of a supermarket is 600 square meters. Some of the larger stores have areas of 1,000 - 2,000 square meters. Typical Middle Eastern-style open-air markets and small groceries serve the remainder of the food market. In recent years, specialty food stores have developed in all of the main metropolitan centers.

Food Standards and Regulations

See Gain Report IS6017 - <http://www.fas.usda.gov/gainfiles/200607/146208505.pdf>

The Standards Institution of Israel (SII) is the agency responsible for the development of most product standards, compliance testing, and certification of products and industry quality assurance systems. For further information, interested firms should contact: The Standards Institution of Israel, 42 Levanon Street, Tel Aviv 69977; Tel: 972-3-6465154; Fax: 972-3-6419683; E-mail: vered@sii.org.il.

It is the declared policy of the Government of Israel to adopt international standards wherever possible, and to implement mandatory standards related only to safety, health, and the environment. In practice, however, many products are still subject to mandatory standards some of which were designed to favor domestic producers over importers. As in the case of plywood, these local standards often specify terms of design rather than performance.

The Israel plywood standard effectively excludes most U.S. plywood from the market. Israel has not officially adopted ISO-9000 standards, although there is a growing preference for ISO-9000 standards among Israeli importers. This is especially important in the case of ingredients and raw materials destined for the production of export products.

The Government of Israel requires that food and health products be registered with the Ministry of Health before they can be sold in the country. FDA approval for food and health care products is not mandatory, but Israeli importers prefer it as it accelerates the product registration process and import license approval. Product registration normally takes from 4-6 weeks if all documentation is in order.

Another subject to be considered is the issue of kosher food. Kosher certification is not a legal requirement for importing food into Israel, with the exception of all types of meat. However, non-kosher products have a much smaller market as the large supermarket chains and hotels refuse to carry them. Manufacturers who produce kosher products must be able to satisfy Israeli rabbinical supervisors that all ingredients and processes are kosher. According to the Law for Prevention of Fraud in Kashrut, only the Chief Rabbinate of Israel is authorized to determine and approve a product as kosher for consumption in Israel; the Chief Rabbinate may authorize another supervisory body to act in its name. Here too, U.S. products have an advantage as Israel's Chief Rabbinate recognizes the kashrut certification issued by many American rabbis. It is, however, quite simple for Israeli importers to send an Israeli rabbi to any supply source, thereby reducing the American advantage. In recent years, opportunity for non-kosher foods has been increased as immigrants from the Former Soviet Union (FSU) make up a significant share of purchasing power (15 percent).

New Food Registration Procedure and Biotechnology Policy

In February 2006, the Israeli "New Food Committee" published new regulations for new food registration. It is expected that the registration of foods containing GMO ingredients will begin by the end of 2006. The new procedure deals with food registration and will not concern the labeling of modified food products.

The purpose of the new regulations is to establish a clear, orderly and systematic registration process for new food and updating the New Foods Register. Its purpose is also to provide information as to the designation of authority and operational responsibility.

Imported food products will be divided into two groups – food products already existing in the food market and new to the market food products. The procedures for each group will be as follows:

1. Already existing food products – The new food committee will issue a list of GMO agricultural varieties, which have been already imported to Israel (soybean, corn, canola, chicory and more). It is assumed that those varieties will be exempt from the registration procedure. However, the Israeli food committee has not yet decided finally on that. It is estimated that the committee will finish its discussions by the end of 2006.

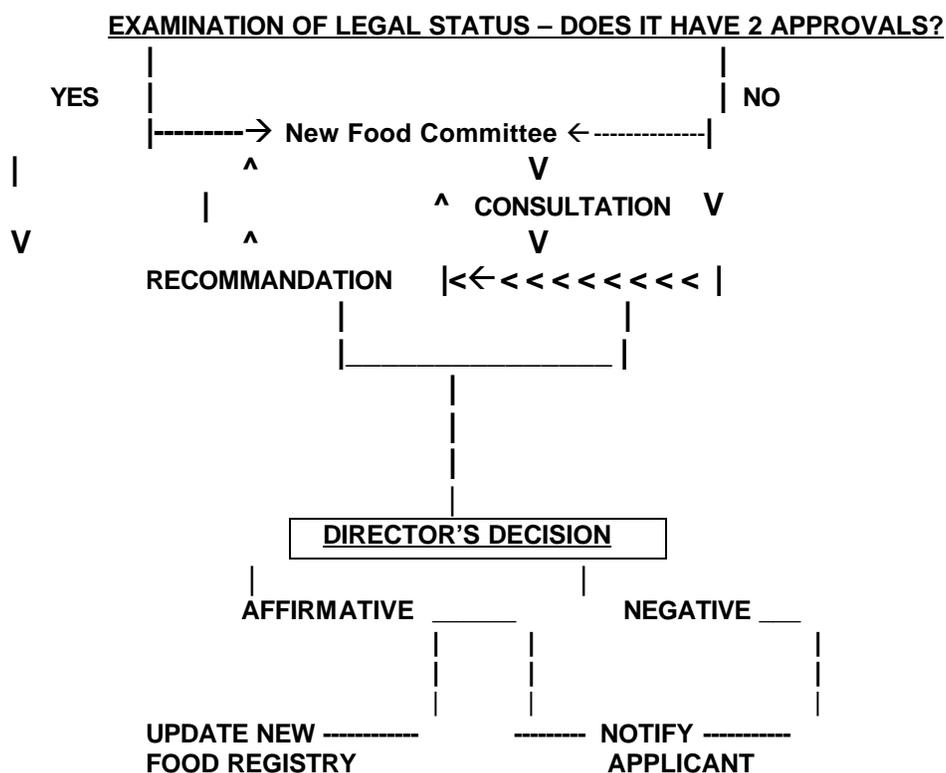
2. For new food products which have not yet been registered, the importer must submit the following registration documents: Application to register a new food, Legislative status of the new food, and Additional requirements of new foods according to the type of new food.

The importer must submit an application to register a new food, Legislative status of the new food accompanied by a risk assessment certificate. The Israeli Health Ministry have authorized the following institutions to carry out food risk assessments:

- The European Communities/EFSA
- USDA (FSIS)
- FDA
- Health Canada
- ANZFA – Australia and New Zealand Food Authority/
FSANZ Food Standards Australia New Zealand
- Japan – Department of Food Safety, Ministry of Health
- WHO/FAO CODEX ALIMENTARIUS Expert Committees

The new food should be approved by at least two institutions on the List of Authorized Bodies.

Figure 1. Treatment of the registration of a new food.



Import Licenses

All import licensing requirements for U.S. made consumer and industrial goods have been eliminated under the United States - Israel Free Trade Area Agreement (FTAA) of 1985 and World Trade Organization (WTO) agreements. Imported food items require the approval of the Ministry of Health's Food Control Administration, which is also responsible for approval of labeling and packaging. All plant material (including dried fruits and nuts) require import approval from the Plant Protection and Inspection Service. Unprocessed and unpackaged imported meat must be licensed by the Israel Veterinary Services (IVS) and originate in a plant which has been certified as approved by the IVS. Packed meat and poultry for retail sale are subject to licensing by the Food Control Administration of the Ministry of Health. Israel law requires that all meat and poultry imports be certified kosher by the Rabbinical Council of the Chief Rabbinate or a body authorized by the Council. As an exception, it is possible to import non-kosher beef offal. Israel's veterinary authorities ban imports of bone-in beef from countries where there is a danger of transmitting Foot and Mouth Disease (FMD) or Bovine Spongiform Encephaly (BSE), also known as the Mad Cow Disease.

General Tips for Exporters

- Consider participating in FAS Tel Aviv organized or sponsored events. FAS Tel Aviv normally participates in ISRAFOOD - An International Food & Beverages Exhibition in Tel Aviv for professionals of the catering and food wholesale, retail, restaurants, hotels, institutional and food shops. During the same time the HOTEK exhibition takes place – presenting food display and restaurant equipment.

It is the largest trade exhibition of its kind in Israel. Israfood represents a good opportunity to present products to key food importers, distributors, retailers, wholesaler and processors. The trade show takes place annually in November.

- Communicate with potential importers of your product. Contact FAS Tel Aviv to obtain a list of local importers; Tel: 972-3-519-7588/7324/7686; Fax: 972-3-510-2565; E-mail: gilad.shachar@usda.gov; Yossi.barak@usda.gov;

Section III: Market Sector Structure and Trends

1. Retail Food Sector

In 2005, the retail food market was valued at \$7.7 billion, of which 44 percent (\$3.4 billion) belonged to the two major retail food-marketing chains. The traditional open markets capture only 9.5 percent (\$738 million) of the food market. The private supermarkets (the "fourth chain") were valued at \$2.22 billion, and grocery stores and minimarkets valued at \$1.34 billion. There are approximately 5,500 grocery stores and 1,700 minimarkets in Israel. Due to the intensive competition in the Israeli food sector, the grocery stores and minimarkets are operating at very small profit margins. More than 100 convenience stores, which are open 24 hours, were established in recent years. The retail food sector's growth in CY 2005 totaled 3 percent.

2. HRI Sector

The Israeli HRI market is very complex and diverse. Food service is divided into two categories: commercial and institutional. The commercial sector is divided into sub-sectors: hotels and restaurants. The commercial sector comprises an estimated 650 hotels and hostels, 2,300 restaurants, more than 700 banquet halls, over 420 coffee shops and cafeterias, and about 900 pubs and bars. In 2005, the market value of the restaurants (\$681 million), coffee shops, pubs and bars was estimated at \$2 billion. Approximately 45 and 23 percent of the bars and pubs respectively, are located in central Israel and northern Israel. In Israel there are about 2,300 kiosks, with a market value of \$1 billion annually. Fifty percent of the kiosks are located in central Israel. In Tel Aviv, approximately 1,550 restaurants, clubs, pubs and bars exist. In 2005, approximately 860,000 people consumed meals away from home per day. The average expenditure for each meal in a restaurant is about \$8.3 per person.

The institutional food service companies include approximately 4,000 kitchens. The Israeli Defense Forces (IDF) is the largest institutional food consumer. It is estimated that the IDF alone consumes about 4 percent of all Israeli food through its purchasing channels. Currently the IDF is in the process of privatizing its food supply chain (150,000 meals/day). The Israeli police force will join the IDF as a consumer in the project adding an additional 20,000 meals/day. Total revenue of the Israeli food trade is estimated at \$7.07 billion, and the HRI market is valued at \$4.42 billion.

In 2005, 1.9 million people visited Israel, of which 24 percent were from the U.S. Entries into the country rose by 27 percent compared to the previous year. In 2005, income from tourism totaled \$2.9 billion, a 21 percent increase compared to the previous year.

Section IV: Best High Value Products Prospects

Wine and beer
Energy drinks
Coffee and Tea
Organic food
Ice cream
Soy food products
Frozen pizza
Morning cereals
Fish and seafood products
Baby food
Frozen Bagels
Frozen vegetables
Pet food
Vinegar and Olive oil
Dried fruits & Nuts
Intermediate products for further processing (whip toppings, corn and potato starch, milk powder, products for the baking industry)

In July 2006, the Israel Customs Service changed the tariff rate for imported cheese. The maximum tariff rate was cancelled and a specific tariff was implemented. The new policy is designed to protect the local cheese industry, mainly against inexpensive cheese imports from Russia and east Europe. As a result, it is estimated that local cheese sales and high quality cheese imports will increase on the account of low quality cheese imports (See Gain report IS6020 - <http://www.fas.usda.gov/gainfiles/200609/146208843.pdf>)

Israel approved a plan to allow organized gambling on horse racing in Israel. The number of race horses is expected to increase from 250 to 1,200 (380 percent), in addition to the development of many supporting services. Two new hippodromes will be constructed, and it is estimated that horseracing gambling will begin in 2007. The future presents good opportunities for U.S. suppliers (See Gain report IS5001 - <http://www.fas.usda.gov/gainfiles/200506/146129922.pdf>)

Section V: Key Contacts and Further Information

U.S. Mailing Address: AGRICULTURE UNIT 7228 BOX 3 APO AE 09830
Packages can weigh no more than 70 pounds and must not be larger than 108 inch.
Anything larger will be subject to a tariff.

Local Mailing address: Contact the Office of Agricultural Affairs in the U.S. Embassy in Tel Aviv. Contact: Tel: 972-3-5197588/7324, Fax: 972-3-5102565, E-mail: gilad.shachar@usda.gov ; yossi.barak@usda.gov

Food Control Service
Ministry of Health

12 Ha'arba'a St.
64739, Tel Aviv
Israel
Web site: <http://www.health.gov.il/english/>
Tel: 972-3-6270100
Fax: 972-3-5619549

Contact: Ms. Ruthy Shinberg: Tel: 972-3-6270107
Milk Products Import Specialist: Contact: Mr. Eli Gordon: Tel: 972-3-6270136

Israel Veterinary and Animal Health Services (IVAHS)

Web Site: <http://www.vetserveng.moag.gov.il/vetserveng>

Ministry of Agriculture

P.O. Box 12

50250, Bet Dagan

Israel

Contact: Dr. Moshe Chaimovich, Director. E-mail: mosheh@moag.gov.il

Tel : 972-3-9681614, 972-3-9690871

Fax: 972-3-9681641, 972-3-9681746

Import & Export Veterinary Division

Chief Import & Export Veterinary Officer Dr. Med. Vet. Roni Ozari

Tel: 972-3-9681649, Fax: 972-3-9605194. E-mail: ronio@moag.gov.il

Plant Protection & Inspection Service (PPIS)

P.O. Box 78

50250, Bet Dagan

Israel

Contact: Ms. Miriam Freund, Deputy Director

Tel : 972-3-9681561

Fax: 972-3-9681582

E-mail: miriamf@moag.gov.il

Web Site: www.ppis.moag.gov.il/PPIS/SiteEnglish/SiteinEnglish/

Standards Institution of Israel

42 H. Levanon St

69977, Tel Aviv

Israel

Web Site: www.sii.org.il

General Information: E-mail: vered@sii.org.il

Tel : 972-3-6465154

Fax: 972-3-6419683

Major Newspapers and Business Journals

- English Language:

Ha'aretz (daily English version) <http://www.haaretz.com>

The Jerusalem Post (daily newspaper) <http://www.jpost.com>

Globes <http://www.globes.co.il/serveen/>

The Marker <http://www.themarker.co.il/eng/>

More Useful Web Sites

Bank of Israel - <http://www.bankisrael.gov.il/firsteng.htm>

Central Bureau of Statistics - <http://www.cbs.gov.il/engindex.htm>

The Agricultural Research Center of Israel - <http://www.agri.gov.il/>

Ministry of Agricultural and Rural Development - <http://www.moag.gov.il/english/>

Faculty of Agricultural, Food and Environmental Quality Sciences
<http://www.agri.huji.ac.il/index-eng.html>

Annex 1: Imports of Main Agricultural and Food Products

Product Category	2004		2005	
	Million \$	Percent	Million \$	Percent
Live animals	21.621	0.85	37.139	1.48
Meat & edible meat offal	156.779	6.15	148.459	5.93
Fish, crustaceans and mollusca	103.198	4.05	113.663	4.54
Dairy produce; eggs, natural honey; edible products of animal origin	31.669	1.24	36.603	1.46
Products of animal origin n.e.c	2.919	0.11	3.739	0.15
Live trees and other plants, bulbs, roots and other garden plants	9.995	0.39	11.026	0.44
Edible vegetables, roots and tubers	42.638	1.67	43.722	1.75
Edible fruits and nuts; peel of melons and other citrus fruit	92.719	3.64	112.354	4.49
Coffee, tea, mate and spices	49.810	1.95	58.542	2.34
Cereals	566.095	22.20	449.015	17.93
Products of milling industry; malt and starches; wheat gluten	41.641	1.63	40.236	1.61
Oil seeds, grains, fruits, industrial and medical plants. Straw and feed	280.737	11.01	249.603	9.97
Tree gum; resins, other vegetable saps and extracts	18.307	0.72	18.559	0.74
Vegetable plaiting materials; vegetable products n.e.c	7.830	0.31	9.259	0.37
Animal or vegetable fats and oils; animal or vegetable waxes	64.620	2.53	73.679	2.94
Preparation of meat, fish, or of other aquatic invertebrates	38.839	1.52	43.888	1.75
Sugar and sugar confectionery	163.823	6.43	175.041	6.99
Cocoa and cocoa preparations	77.240	3.03	80.835	3.23
Preparations of cereals, flour starch or milk; pastry products	94.457	3.71	101.192	4.04
Preparations of vegetable, fruits, nuts and other plants	135.029	5.30	131.985	5.27
Miscellaneous edible preparations	202.469	7.94	213.110	8.51
Alcoholic beverages and vinegar	96.426	3.78	103.947	4.15
Residues and waste from the food industries; prepared animal feed	127.895	5.02	126.358	5.05%
Tobacco and tobacco substitutes	122.686	4.81	122.244	4.88
Grand total	2,549.442	100	2,504.198	100

Source: CBS, Foreign Trade Statistics, Different Years.