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# **Egypt**

## **Exporter Guide**

### **Annual**

### **2003**

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#### **Report Highlights:**

**Egypt has a population of about 68 million with an annual growth of 2.03 percent. Egyptian consumers are increasingly becoming aware of the quality and variety of imported consumer-oriented products. However, Egypt still maintains many trade barriers including abrupt rule changes, non-transparent regulations and stringent product labeling requirements.**

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Includes PSD changes: No  
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## SECTION I MARKET OVERVIEW

### 1.1 Economic Situation

On January 28, 2003, the Government of Egypt reversed its long-standing policy of fixed exchange rate system and announced that its currency would float. This is a major economic reform step for the government since foreign exchange rates will now be determined by market conditions rather than being set by the government. If implemented as stated, the new exchange rate mechanism is expected to enhance confidence in the Egyptian economy and make Egyptian exports more competitive. The parallel market is still active although the gap between the bank rate and the parallel market rate has narrowed in recent days. The price of many food and feed items particularly imports, increased approximately 20 to 30 percent in reaction to the devaluation of the pound. Many importers are reporting that foreign exchange availability is tight in the banking system and they are unable to open letters of credit in banks. Importers also note that they are unable to price their products because of frequent fluctuations of the Egyptian Pound. As a result, many businesses have decided to monitor the market for a while before making new purchasing plans.

In an attempt to calm worried consumers, the government announced March 10, 2003 that it would suspend the purchase of "non-essential" imports for a period of three months. Goods imported by the private sector are not affected by this policy. According to the announcement, the government would continue to import basic food commodities such as wheat, corn, sugar, vegetable oil and other "strategic commodities." Moreover, the announcement said that the government plans to "fix" the price of 21 commodities produced by the private sector companies including sugar, flour, vegetable oil, soap, macaroni, cheese, tea and meat. However, most of the commodities mentioned in this announcement are in the hands of private trade not the government. Therefore, this measure is not expected to affect the price of most commodities.

In an attempt to reform its import and export regime, the Government of Egypt took a significant step to streamline the process of import inspection by issuing a Presidential Decree No. 106 of 2000 which centralized the process of inspection and certification of imported goods. In the past, there were five government entities involved in the import clearance process. With this decree, inspection will only be done through the Central Authority for Import and Export Control Authority (GOEIC) of the Ministry of Foreign Trade.

The European Union and Egypt signed a partnership agreement on June 24, 2001 whereby import tariffs on most products, including agricultural products will be cut substantially, or eliminated over the next 12-15 years. The Agreement is expected to be implemented in the next 12-15 months. 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. When implemented, the EU-Egypt Partnership Agreement may disadvantage some U.S. agricultural products in the market, particularly value added products.

## **1.2 Demographic Developments**

Egypt has a population of about 68 million with an annual growth rate of 2.02 percent. The official unemployment rate is 9 percent, but many in the private sector estimate the unemployment rate to be about 20 percent.

## **1.3 Consumer Buying & Eating Habits**

Egyptian consumers are increasingly becoming aware of the quality and variety of consumer-oriented products. As a result, Egyptian consumers' buying habits are changing dramatically. In the past, most Egyptian consumers used to buy 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 started to purchase most of their requirements from supermarkets. Also, with changing eating habits, expansion of fast food chains, local restaurants and resorts, there is a good potential for imported products.

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

In 2002, total U.S. imports for consumer-oriented products totaled \$47 million compared to \$50.5 million in 2001. This decrease is attributed to the current political situation in the Middle East and the devaluation of the Egyptian pound which lost 22 percent of its value against the dollar in the last 3 months. Major importers are reporting a decrease of 30 percent in sales as a results of these conditions. 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. Some importers who used to bring in mostly 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. and European countries, mainly France, Spain, Italy, Germany, Greece, Holland, Denmark and South Africa 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 poultry and alcohol.

Following is a summary of the advantages and challenges that face U.S. agricultural exporters in Egypt.

ADVANTAGES	CHALLENGES
With the growing number and expansion of supermarkets chains, hypermarkets and the presence of international chains, such as "Carrefour" French, "Shoprite" South African and "Metro" Germany, the market opportunities for new-to-market products will increase.	The EU-Egypt Partnership Agreement may disadvantage some U.S. 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 and often act as barriers to trade.
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 conclusive for marketing activities that highlight U.S. products

## SECTION II EXPORTER BUSINESS TIPS

### Local Customs (New Decree on Customs Valuation)

On July 25, 2001, the Government of Egypt (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 followed a successful one-year petition to buy time (from July 2000 to July 2001) in order to comply with the WTO rules. This Ministerial 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 new 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 new 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 new 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 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 in the Red Sea Coast and Sinai. American fast-food chains dominate the market. At present, thirty American fast food franchisors, such as A&W, Chili's, Fuddruckers, Hard Rock Café, KFC, Kenny Rogers, Little Caesars, Pizza Hut, McDonalds, 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 Industry has sole responsibility for establishing, adopting and publishing food standards and codes of practice. If no mandatory Egyptian standard exist, 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.

The Ministry of Health issued a new Decree 73 of 2001 regarding colors admissible for use on packaging materials. It is mandatory that colors used on internal and external packaging must not be harmful to human health. The decree 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 and Import Control (GOEIC), Ministry of Foreign Trade. 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 only in English (or other foreign language) is not allowed. Dates are accepted in English, but the word "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 cannot 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 of 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 limit marketing options for U.S. exporters. This also leads to higher prices for Egyptian consumers.

Amending information on the label is permitted, but amendments must be done inside the customs area. 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. Many of these quality characteristics should be voluntary industry standards rather than mandatory government standards. 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 the 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 bases.

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

- S 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.
- S Consider visiting Egypt when the political environment in the region improves. U.S. suppliers who are interested in doing business in Egypt are encouraged to visit Egypt in order to better understand the potentiality of the market and establish relationships with potential clients.
- S Production and expiry dates are mandatory and Arabic/English labels or stickers are required. A thorough report on Egypt's 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](#))
- S 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.
- S Communicate with potential importers of your product. Contact FAS/Cairo to obtain a list of local importers; Tel: 011 (202) 797-2388 / 2389; Fax: 011 (202) 796-3989; E-mail: [AgCairo@fas.usda.gov](mailto:AgCairo@fas.usda.gov).
- S Advertisements. Television advertising is expensive. However, advertisement in monthly magazines are effective when targeting a specific audience. Also, there are specific magazines for hotels and restaurants.
- S 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, major supermarkets, and hotels and restaurants institutions. For more information, please contact FAS/Cairo on how to participate.
- S Be ready to accept small orders than normal or share a shipment with other suppliers. Local importers tend to purchase small quantities to introduce new-to-market products until they become confident that the product has market potential.

## SECTION III MARKET SECTOR STRUCTURE AND TRENDS

### 1. RETAIL FOOD SECTOR

Egyptian consumers have 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" French and "Shoprite" South Africa. This is attributed to the fact that Egyptian buying habits are changing dramatically. Middle to high income consumers have started to purchase most of their requirements from supermarkets as opposed to local neighborhood stores.

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 will soon expand into the Red Sea and other governorates.

Following is the number of Outlets in Egypt:

<b>Number of Outlets (2000/2001)</b>						
	<b>Wholesalers</b>	<b>Super- markets</b>	<b>Groceries</b>	<b>Kiosks</b>	<b>Gas stations</b>	<b>Total</b>
<b>Cairo + Giza</b>	2123	119	33623	6401	274	<b>42540</b>
<b>Alexandria</b>	450	25	7753	2327	110	<b>10665</b>
<b>Total Delta</b>	1917	4	23143	5834	336	<b>31234</b>
<b>Grand Total</b>	<b>4490</b>	<b>148</b>	<b>64519</b>	<b>14562</b>	<b>720</b>	<b>84439</b>

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. Dining outside the home is becoming 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 in Alexandria and the Red Sea Coast and Sinai. 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. Hotels are price sensitive food buyers. Imports from Europe, New Zealand, and Canada account for 91 percent of the market compared to 9 percent from the U.S. Among products imported for hotels are high quality beef, seafood (lobsters & soft crabs), sauces, canned vegetables & fruits, Tex Mex products and beef liver. According to a major hotel caterer, volume of meat imports may increase by 300 percent 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 is 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.

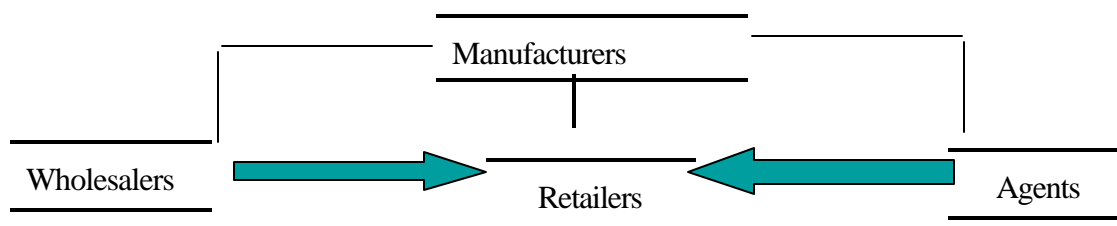
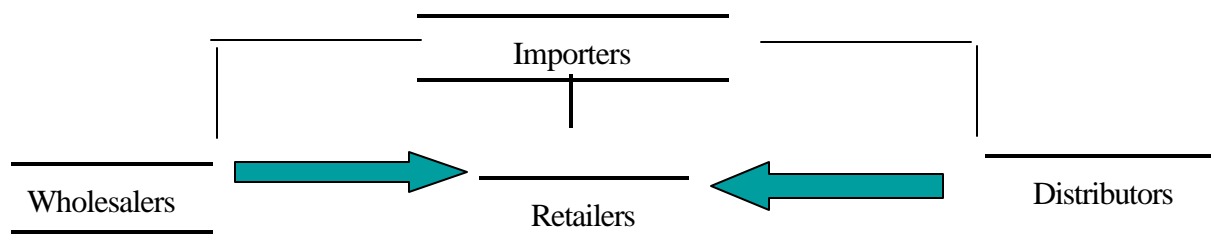
## 3. FOOD PROCESSING

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, but most food processors depend on local products as inputs rather than imports.

The Arab countries, particularly the Gulf States are traditional export markets of Egypt's canned and frozen food products. European Union countries and to a lower extent the U.S. 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:

- S** Dairy product facilities represent about 9 percent of the overall food sector.
- S** The production of sweets and confectionery products depends heavily on imported sugar, cocoa, beans, oils, fats, coconut milk, nuts and dried fruits.
- S** 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 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  
APO AE 09839-4900

**Local Mailing Address:** 8 Kamal El Din Salah Street  
Garden City  
Cairo, Egypt

**Tel:** 01-1 (202) 797-2388 / 2389

**Fax:** 01-1 (202) 796-3989

**E-mail:** [AgCairo@fas.usda.gov](mailto:AgCairo@fas.usda.gov)

**Internet Homepage:** [www.usembassy.egnet.net](http://www.usembassy.egnet.net)

### ***PERTINENT GOVERNMENT FOOD IMPORT CONTACTS***

#### **MINISTRY OF AGRICULTURE**

**Contact:** Dr. Youssef El Daoudi  
Undersecretary for Plant Quarantine  
**Tel:** (20-2) 336-3582  
**Fax:** (20-2) 337-2881 / 336-1727

Dr. Rabie Saber Eid  
Chief of Quarantine Service  
**Tel:** (20-2) 748-1750 / 1763  
**Fax:** (20-2) 335-0692 / 336-1727

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

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

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



**MINISTRY OF HEALTH & POPULATION**

**Contact:**     **Dr. Mahmoud Abu El Nasr**  
                  **First Undersecretary for Preventive Medicine**  
**Tel:**        **(20-2) 794-8555**  
**Fax:**        **(20-2) 794-1076**

**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 Riham Street**  
                  **Cairo, Egypt**  
**Tel:**        **(20-2) 794-7271 / 2 / 3**  
**Fax:**        **(20-2) 796-2248**

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

**FOOD INSTITUTE**

**Contact:**    **Dr. Hoda Abdel Fattah Hassan**  
                  **Chairman**  
                  **Dr. Mohamed Fahmy Sadik**  
                  **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 & DEMOGRAPHIC INFORMATION (2002)**

Total Imports (billion)	\$14.7
Total Agricultural Imports (billion)	\$2.5**
Total Agricultural Imports as a percent of Total Imports	17 percent
Total Agricultural Imports from the U.S. (Million)	\$866,940
Total Consumer Oriented Products from U.S. (million)	\$47
U.S. Ag. Market Share	34 percent
Population (million)	67.9
Population Growth	2.02
Inflation Rate	2.4 percent
Agriculture's Contribution to GDP	16.6 percent
Exchange Rate	(US\$ 1 = L.E. 5.90) on April 20, 2003

\*\* The total Ag. Imports is only from January through September.

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

**APPENDIX II**  
**CONSUMER FOOD & EDIBLE FISHERY PRODUCT IMPORTS**  
**IMPORTS (2000 - 2002 / \$ million)**

<b>PRODUCT</b>	<b>2000</b>			<b>2001</b>			<b>2002</b>		
	<b>WORLD</b>	<b>U.S.</b>	<b>US SHARE</b>	<b>WORLD</b>	<b>U.S.</b>	<b>US SHARE</b>	<b>WORLD</b>	<b>U.S.</b>	<b>US SHARE</b>
<b>FRESH VEGETABLES</b>	127,560	21,106	17%	1,232,404	1,446	0%	2,964,167	0%	0%
<b>FROZEN VEGETABLES</b>	280,497	223,680	80%	73,522	48,737	66%	4,482,940	0%	0%
<b>DRIED VEGETABLES</b>	7,135,901	372,256	5%	8,920,695	266,835	3%	15,163,857	297,519	2%
<b>NUTS</b>	12,184,351	2,781,632	23%	11,960,915	2,204,561	18%	11,924,865	2,582,107	22%
<b>FRESH FRUIT</b>	1,199,275	172,527	14%	1,211,755	95,576	8%	1,614,873	33,567	2%
<b>APPLES</b>	28,980,026	5,926,985	20%	27,275,726	6,713,951	25%	18,377,459	3,574,182	19%
<b>DRIED FRUIT</b>	10,646,977	412,224	4%	10,254,028	308,990	3%	8,943,397	223,036	2%
<b>COFFEE</b>	8,056,434	60,302	1%	4,744,980	113,930	2%	6,369,387	11,746	0%
<b>SPICES</b>	55,015,290	45,605	0%	21,680	3,414	16%	428,460	0	0%
<b>BEEF CANNED (RED MEAT PREPARED)</b>	2,216,352	87,135	4%	3,227,323	200,368	6%	1,783,510	0	0%
<b>RED MEAT (FRESH, CHILLED, FROZEN)</b>	232,689,563	6,855	0%	130,510,745	49,262	0%	191,419,592	156,034	0%
<b>BOVINE, OFFALS FROZEN</b>	49,537,035	46,738,558	94%	30,177,149	30,038,212	100%	34,276,728	34,169,474	100%
<b>FROZEN FISH</b>	100,992,803	44,124	0%	90,944,054	5,223,829	6%	64,070,544	3,135,755	5%
<b>COCOA PASTE</b>	453,883	0	0%	570,770	11,481	2%	1,049,461	0	0%
<b>COCOA BUTTER</b>	184,141	0	0%	8,464,720	46,878	1%	1,244,744	0	0%

<b>COCOA POWDER</b>	<b>7,380,604</b>	<b>178,204</b>	<b>2%</b>	<b>6,242,367</b>	<b>32,058</b>	<b>1%</b>	<b>11,899,353</b>	<b>46,803</b>	<b>0%</b>
<i>PRODUCT</i>	<i>2000</i>			<i>2001</i>			<i>2002</i>		
	<i>WORLD</i>	<i>U.S.</i>	<i>US SHARE</i>	<i>WORLD</i>	<i>U.S.</i>	<i>US SHARE</i>	<i>WORLD</i>	<i>U.S.</i>	<i>US SHARE</i>
<b>BISCUITS / BREAD / WAFFLES</b>	<b>2,137,982</b>	<b>329,937</b>	<b>15%</b>	<b>3,053,057</b>	<b>454,628</b>	<b>15%</b>	<b>3,729,473</b>	<b>984,798</b>	<b>26%</b>
<b>JAMS</b>	<b>6,449,172</b>	<b>39,935</b>	<b>1%</b>	<b>4,132,853</b>	<b>19,753</b>	<b>0%</b>	<b>316,621</b>	<b>49,259</b>	<b>16%</b>
<b>JUICES</b>	<b>1,883,583</b>	<b>69,833</b>	<b>4%</b>	<b>1,590,808</b>	<b>112,472</b>	<b>7%</b>	<b>1,222,398</b>	<b>89,298</b>	<b>7%</b>
<b>SAUCES / MAYONNAISE / KETCHUP</b>	<b>1,227,736</b>	<b>784,051</b>	<b>64%</b>	<b>815,178</b>	<b>475,717</b>	<b>58%</b>	<b>806,375</b>	<b>299,658</b>	<b>37%</b>
<b>ICE CREAM</b>	<b>459,707</b>	<b>50,350</b>	<b>11%</b>	<b>350,471</b>	<b>147,481</b>	<b>42%</b>	<b>974,029</b>	<b>205,044</b>	<b>21%</b>
<b>JELLY</b>	<b>503,899</b>	<b>245,289</b>	<b>49%</b>	<b>62,289</b>	<b>22,714</b>	<b>36%</b>	<b>0</b>	<b>0</b>	
<b>BEER</b>	<b>139,593</b>	<b>0</b>	<b>0%</b>	<b>n/a</b>	<b>22</b>	<b>n/a</b>	<b>11,887</b>	<b>0</b>	<b>0%</b>
<b>WINE</b>	<b>489,040</b>	<b>0</b>	<b>0%</b>	<b>274,921</b>	<b>0</b>	<b>0%</b>	<b>204,127</b>	<b>16,825</b>	<b>8%</b>
<b>PET FOOD</b>	<b>n/a</b>	<b>176</b>		<b>767,476</b>	<b>250,786</b>	<b>33%</b>	<b>1,209,008</b>	<b>152,522</b>	<b>13%</b>
<b>PASTAS</b>	<b>1,840,865</b>	<b>79,282</b>	<b>4%</b>	<b>985,082</b>	<b>128,140</b>	<b>13%</b>	<b>892,919</b>	<b>4,199</b>	<b>0%</b>
<b>CHEESE</b>	<b>32,810,785</b>	<b>366,211</b>	<b>1%</b>	<b>23,023,931</b>	<b>204,213</b>	<b>1%</b>	<b>22,652,069</b>	<b>230,755</b>	<b>1%</b>
<b>BUTTER</b>	<b>75,713,972</b>	<b>0</b>	<b>0%</b>	<b>66,723,931</b>	<b>287,294</b>	<b>0%</b>	<b>65,801,264</b>	<b>0</b>	<b>0%</b>
<b>MILK POWDER</b>	<b>49,883,323</b>	<b>10,477,016</b>	<b>21%</b>	<b>47,058,800</b>	<b>1,236,517</b>	<b>3%</b>	<b>33,837,190</b>	<b>1,600,713</b>	<b>5%</b>
<b>PASTEURIZED EGGS</b>	<b>412,559</b>	<b>100,297</b>	<b>24%</b>	<b>243,692</b>	<b>31,643</b>	<b>13%</b>	<b>152,413</b>	<b>42,703</b>	<b>28%</b>
<b>GRAND TOTAL</b>	<b>755,558,67</b>	<b>73,418,56</b>	<b>10%</b>	<b>553,520,26</b>	<b>50,838,53</b>	<b>9%</b>	<b>558,889,43</b>	<b>50,043,34</b>	<b>9%</b>
	<b>2</b>	<b>1</b>		<b>9</b>	<b>9</b>		<b>7</b>	<b>0</b>	

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

**APPENDIX III**

<b>SUPPLIERS OF CONSUMER FOODS AND EDIBLE FISHERY PRODUCTS</b>			
<b>PRODUCT</b>	<b>LARGEST SUPPLIERS</b>	<b>MARKET SHARE (%)</b>	<b>U.S. MARKET SHARE (%)</b>
Fresh Veg.	China	95%	0 %
Frozen Vegetables	Netherlands Saudi Arabia	70% 30%	0%
Dried Vegetables	Mynamar Canada China	36% 21% 7%	2%
Fresh Fruit	Lebanon Chily Syria Italy France Greece	24% 13% 9% 9% 5% 5%	8%
Dried Fruit	Turkey Syria Greece Iran	32% 19% 12% 11%	2%
Nuts	Turkey India	60% 18%	22%
Coffee	Indonesia Brazil India Vietnam	40% 28% 8% 4%	0%
Spices	India China Syria	39% 21% 19%	0%
Red Meat Prepared	Brazil Argentina Jordan	81% 9% 5%	0%

<b><i>SUPPLIERS OF CONSUMER FOODS AND EDIBLE FISHERY PRODUCTS</i></b>			
<b><i>PRODUCT</i></b>	<b><i>LARGEST SUPPLIERS</i></b>	<b><i>MARKET SHARE (%)</i></b>	<b><i>U.S. MARKET SHARE (%)</i></b>
Red Meat (fresh, chilled, frozen)	Brazil India Argentina Uruguay	43% 28% 20% 3%	0%
Bovine, offals frozen	U.S.		100%
Canned Fish	Thailand France Indonesia	93% 1% 1%	1%
Frozen Fish	Netherlands United Kingdom Ireland EEC France Germany	35% 16% 15% 7% 4% 4%	5%
Cocoa Paste	United Kingdom China France	53% 32% 4%	0%
Cocoa Butter	United Kingdom France	88% 4%	0%
Cocoa Powder	U.A.E. United Kingdom Malaysia Netherlands France Indonesia	21% 11% 8% 7% 5% 4%	0%
Other Food Preparations	United Kingdom Germany Netherlands Australia	68% 4% 4% 3%	9%
Biscuits / Bread / Waffles	EEC United Kingdom	15% 12%	26%

<b>SUPPLIERS OF CONSUMER FOODS AND EDIBLE FISHERY PRODUCTS</b>			
Biscuits / Bread / Waffles	Germany Italy Saudi Arabia France	9% 8% 6% 2%	
Jams	Poland France Belgium Hungary Bulgaria	21% 20% 14% 12% 8%	16%
Juices	Spain U.A.E. Cyprus Thailand Saudi Arabia	25% 9% 8% 7% 2%	7%
Sauces / Mayonnaise / Ketchup	India Netherlands France Germany Pakistan	18% 13% 6% 4% 4%	37%
Ice Cream	France Germany EEC	38% 17% 9%	21%
Beer	Ireland	100%	0%
Wine	EEC Italy Saudi Arabia	44% 26% 17%	8%
Pet Food	France Australia Germany	18% 16% 13%	13%

<b>SUPPLIERS OF CONSUMER FOODS AND EDIBLE FISHERY PRODUCTS</b>			
Pastas	Italy Indonesia Saudi Arabia China Turkey	29% 16% 11% 8% 8%	0%
Cheese	Netherlands Denmark	56% 3%	1%
Cheese	France United Kingdom	2% 2%	
Butter	New Zealand Australia	60% 20%	0%
Milk Powder	New Zealand Poland Sweden	16% 15% 14%	5%
Pasteurized Eggs	France India	51% 18%	28%

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