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## **Egypt**

### **Food Processing Ingredients 2019**

#### **Egypt's Food Processing Ingredients Landscape**

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**Report Highlights:**

From January to June 2018, Egypt imported \$2.6 billion worth of food ingredients. Throughout 2017, Egypt imported \$4 billion. The United States is Egypt's sixth largest food ingredients supplier (\$161 million). Egypt utilizing imported food ingredients, exported \$2.1 billion in processed and manufactured foods in 2018 (January-September) mainly to the Middle East. U.S.-origin food ingredients face competition from European, Middle Eastern, and increasingly African-origin exports. These suppliers maintain preferential trade arrangements with Egypt; which provide favorable tariff treatment.

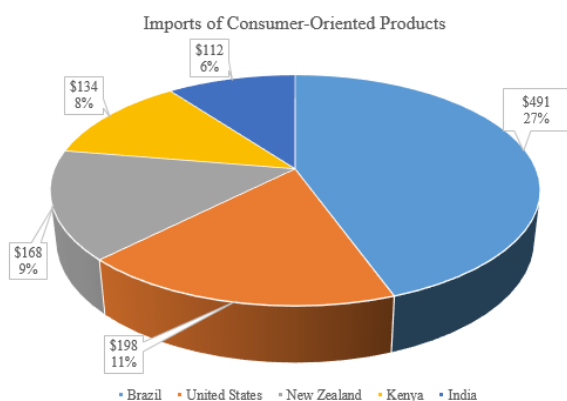
## Market Fact Sheet: Egypt

### Executive Summary

Egypt's hotel, restaurant and retail food sectors are growing in 2018 thanks to a budding recovery in tourism and consumer spending. Sources forecast demand increasing, with growth reaching 15-20 percent by 2021 as tourism and consumer purchasing power recover. U.S.-origin consumer-ready products face competition from other origins benefitting from favorable trade relationships (i.e., free trade agreements). In 2018, U.S. consumer-oriented products exports to Egypt were beef livers and other beef offal, milk products, and food preparations.

### Imports of Consumer-Oriented Products

Egypt imported \$1.8 billion in consumer-oriented products from January to June 2018. Primary suppliers were Brazil, United States, New Zealand, Kenya and India.



### Food Processing Industry

In 2016, the Egyptian government implemented policies that discouraged the import of consumer-oriented products. Ingredients and products for further processing are a priority. There are over 7,000 food processing and manufacturing companies in Egypt, generating sales of about \$17 billion in 2018. Although improving, local production remains more limited in terms of quality and variety.

### Retail Food Industry

The Egyptian retail foods sector size is close to \$16 billion. Higher income consumers drive much of the demand for imported products, while low- and middle-income consumers substitute imports with domestic alternatives. As incomes recover, in tandem with increased purchasing power, the market is growing. Sources foresee growth of 15-20 percent over the next five years. Traditional outlets still dominate the Egyptian market, representing 98 percent of total outlets and around 80 percent of total sales. Modern retail outlets are nonetheless growing in number and volume of sales. Online retail platforms are increasingly popular as internet penetration increases.

### Quick Facts 2018 (January-June)

#### Imports of Consumer-Oriented Products \$1.8 billion

#### List of Top 10 Growth Products in Egypt

- |                             |                           |
|-----------------------------|---------------------------|
| 1) Frozen Beef              | 2) Beef Liver             |
| 3) Black Tea <3kg           | 4) Butter                 |
| 5) Crm, Cntd,Swt,Powdr 1.5% | 6) Food Preparations      |
| 7) Apples, Fresh            | 8) Cheese                 |
| 9) Milk Conc. FAT>1.5%      | 10) Fats & Oils from Milk |

#### Consumer-Oriented Foods (\$1.8 billion) 2018 (Jan-June)

Consumer-Oriented Food Sales	\$15.2
Exports*	\$2.1
Imports*	\$1.8
Inventory	N/A
Total Sales	\$17
Retail	\$16
Food Service	\$1

Note: \* Refers to consumer-oriented products only.

#### Top Egypt Hotels & Restaurants Chains & Retailers

- |                          |                             |
|--------------------------|-----------------------------|
| - Marriott International | - Americana Group           |
| - Hilton International   | - Manfoods                  |
| - Accor International    | - Intl. Co. Food Industries |
| - Mövenpick Hotels       | - Delicious Inc.            |
| - Steigenberger          | - Mo'men Group              |
| - Carrefour              | - Mansour Holding           |
| - Seoudi Market          | - On-the-Run                |
| - HyperOne               | - Spinneys                  |
| - BIM                    | - Kazyoun                   |
| - Gourmet                | - Alfa Market               |

#### GDP/Population

Population (millions): 99.4

GDP (billions USD): \$236.5 (2017), \$333 (2016)

GDP per capita (USD): 12,700 PPP

Sources: World Bank, International Monetary Fund, Central Intelligence Agency, FAS Cairo office research.

#### Strengths/Weaknesses/Opportunities/Challenges

Strengths	Weaknesses
1. Large consumer market 2. Consumer acceptance of U.S. origin products	1. High tariffs 2. Complex import regulations
Opportunities	Threats
1. Growing demand 2. Shortage in supply of imported consumer-oriented products	1. Trade competitors with free trade agreements 2. Trade competitors with closer proximity

Data and Information Sources: FAS Cairo office research.

Contact: FAS Cairo [AgCairo@fas.usda.gov](mailto:AgCairo@fas.usda.gov)

## SECTION I: MARKET SUMMARY

Egypt is the Arab world's most populous country. Ninety-five percent of this North African country's 99.4 million inhabitants (Central Intelligence Agency – July 2018 estimate) live within 20 kilometers of the Nile River and its delta, on about five percent of the total land area. The country is predominantly rural (57 percent); by 2030, the rural population will however drop to 53 percent. The country's population is growing at 2.4 percent per annum, adding some 2 million Egyptian consumers yearly. The population will surpass 100 million by 2020 and reach 117 million by 2030, making Egypt the 15<sup>th</sup> largest country in the world. Egypt is one of the world's fastest growing markets for food. Rapid population growth (46 percent in 1994-2014) stresses limited natural resources, jobs, housing, sanitation, education, and health care.

Egypt imported \$2.6 billion worth of food ingredients from January to June 2018; the United States, the sixth largest supplier with roughly \$161 million in sales, accounts for about six percent of the sector's import market share. Egypt exported over \$2.1 billion in processed and manufactured foods in 2018 (January-June) mainly to the Middle East; there are 339 million potential consumers within 500 kilometers of Egypt's borders. The Egyptian [Chamber of Food Industries \(CFI\)](#) indicates that there are over 7,000 food manufacturing companies operating in the country; it counts with 5,200 registrants. In 2018, the food processing and manufacturing sectors generated \$17 billion in sales.

U.S.-origin food ingredients face competition from European, Middle Eastern, and increasingly African-origin exports. These suppliers maintain preferential trade arrangements with Egypt; which provide favorable tariff treatment. Shipping proximity to Egypt also often provides exporters in these countries an additional comparative advantage against U.S.-origin food ingredients. However, exports of U.S.-origin corn (maize) other than corn, corn (maize) crude oil, food preparations, milk and cream concentrated or sweetened are highly competitive.

**TABLE 1: Advantages and Challenges Facing U.S.-Origin Food Processing Ingredients**

<b>Advantages</b>	<b>Challenges</b>
U.S.-origin ingredients have a good reputation.	U.S. exporters face competition from the European Union (EU). Egypt has a free trade agreement with the European Union.
Companies seek new ingredients, especially affordable unprocessed commodities.	Egypt often recurs to EU standards, which do not coincide with U.S. or Codex standards.
There is growing demand for high-value, highly processed ingredients.	Importers often indicate a lack of U.S. supplier interest in Egypt.
The Egyptian food processing is growing; it requires more imported food ingredients.	Import regulations are complex, non-transparent.
Egypt's food processors and manufactures are exporting to the region. Within 500 kilometers, Egypt has access to 339 million consumers.	Importers are largely unfamiliar with U.S. Export controls, procedures, standards, and certifications.

The 2016 devaluation of the Egyptian pound, and ensuing inflationary pressure on food prices, drove consumers to lower-priced locally produced consumer-oriented products. This shift contributed to the food-processing sector's expansion (see [GAIN EGYPT \(EG 18002\) – Egypt's Food Processing Ingredients Competitive Landscape](#)).

U.S.-origin powdered infant formula and other milk products remain competitive. Egypt is a major market for U.S. beef livers and offal; exports from January to June 2018, reached \$137 million. U.S.-origin beef muscle cuts quality is well known, but despite the room for growth, these are restricted to affluent buyers (see [GAIN EGYPT \(EG 18022\) - Egypt Food Service – Hotel Restaurant Institutional 2018](#)).

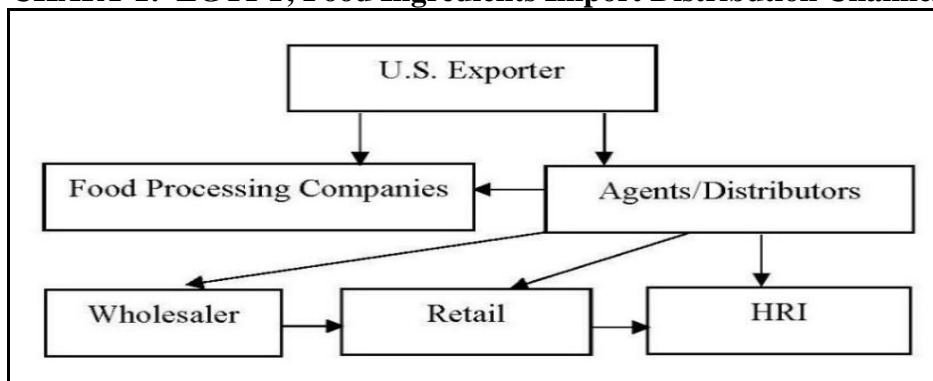
## SECTION II. ROAD MAP FOR MARKET ENTRY

### EXPORTER BUSINESS TIPS

**Market Research:** U.S. exporters should identify an Egyptian importer or distributor, with whom they can build a relationship. Egyptian firms are best suited to navigate local regulations, understand distribution chains, and have relationships with retailers, food processors, hotels, restaurants and institutions (see [GAIN EGYPT \(EG 18004\) - Egypt Food Processing Ingredients 2018](#), [GAIN EGYPT \(EG 18014\) - Egypt Retail Foods Guide 2018](#), and [GAIN EGYPT \(EG 18022\) - Egypt Food Service – Hotel Restaurant Institutional 2018](#)).

**Market Structure:** Egypt's market structure is straightforward. Importers are food processors, manufacturers, and or agents/distributors of these. Large companies will source food ingredients and products directly to lower prices, guarantee product flow, and ensure quality. Agents/distributors service the food processing and manufacturing sectors, comprised of numerous fragmented small- and medium-size companies. Smaller manufacturers purchase reduced quantities, do not import directly, pay in Egyptian pounds, and maintain small inventories.

**CHART 1: EGYPT, Food Ingredients Import Distribution Channel**



**General Consumer Tastes and Trends:** FAS Cairo (Post) attributes the growth in local and imported consumer-oriented foods to Egypt's time-starved middle-class consumers. Ready-to-eat frozen meals and instant noodles are popular time-saving meal options; ingredients for these products are largely imported.

### IMPORT FOOD STANDARDS AND REGULATIONS, IMPORT PROCEDURES

**Customs Clearance:** [Ministry of Foreign Trade and Industry Decree 770/2005 \(October 2005\)](#) establishes the General Organization for Export and Import Control (GOEIC) as the national authority responsible for the inspection and certification of food items. It is responsible for processing customs documents for food imports, as well as issuing the results of inspections through a certificate of conformity (see [GAIN EGYPT \(EG 18034\) – FAIRS Annual Country Report 2018](#) and [GAIN EGYPT \(EG 18033\) – FAIRS Export Certificate Report 2018](#)). (See Appendix I – Egypt, Food Ingredients Import HS Codes).

Documents normally required for food imports include:

- Bill of lading
- Commercial invoice
- Certificate of origin (countersigned by the Chamber of Commerce and notarized by the Egyptian Embassy or Consulate in the country of origin)
- Export/health certificate (FDA certificate of free sale, sanitary, phytosanitary)
- Food Safety Inspection Service certificates
- Packing list
- Certificate of insurance
- Import permit (issued to Egyptian importers)
- Payment guarantee (form 11) from a local bank advising payment transfer to the supplier

**Country Language Labeling Requirements:** The translation into Arabic of the foreign language label information is required. Inconsistency in the translation may result in a rejection. Arabic labeling can be printed on the package or be a permanent adhesive label. Products cannot show more than one date of manufacture or expiration. Label information cannot be erased, scratched, or altered.

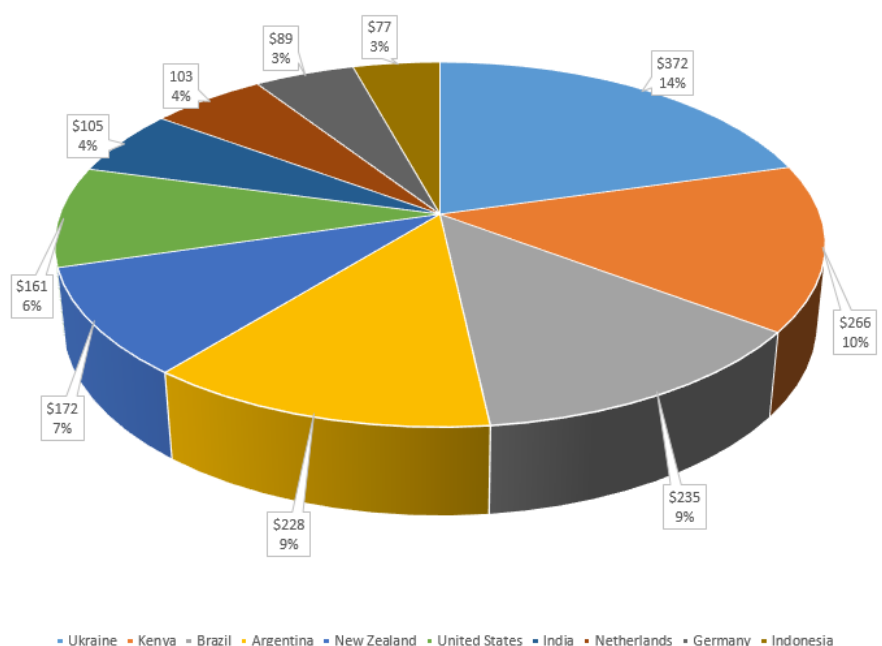
**Tariffs and Free Trade Agreements (FTA):** Presidential Decree No. 419/2018 amends customs tariff categories listed in Presidential Decree No. 184/2013. The amendments published in the official gazette on September 9, 2018, came into effect on 12 September. The amended customs tariff schedule reaffirms Egypt's commitment to the international nomenclature for the classification of products [Harmonized System \(HS\) \(originally introduced in 1988 and with the latest changes/revisions entering into force in 2017\)](#). Customs tariff cover 5,791 items. Around 60 percent of these are raw materials, capital and strategic goods. Intermediate goods (994 items) account for 17 percent of the new tariff schedule; consumer-oriented goods represent 20 percent.

Decree 419/2018 aims to bring Egypt's customs tariff into conformity with the latest version of the international harmonized system, to reform and eliminate distortions in tariff systems, and to abide by international standards (see [GAIN EGYPT \(EG 18027\) – Egypt's New Tariff Lines: Little Impact on Food and Agricultural Products](#)). The new tariff lines aim to protect industry and achieve a tariff balance between intermediate inputs and final products. Post has not discerned any meaningful tariff impact on food and agricultural products. The main features of the amendments have been the inclusion of new, detailed HS codes for fish, fishery products, yoghurt and other imported food products. The amendments are not exceptional, taking place each five years to remain compatible with international standards.

**Trademarks and Patents Market Research:** In June 2002, [Egypt passed the Intellectual Property Rights \(IPR\) Law 82/2002](#). The law describes copyright's legal rights and enforcement procedures, expedited trademark registration, and piracy protection (see [GAIN EGYPT – FAIRS Egypt Country Annual Narrative 2017](#)).

### SECTION III. COMPETITION

**CHART 2: EGYPT, Food Ingredients and Additives Imports by Origin, CY 2018 (January-June) (Millions of U.S. Dollars)**



Source: FAS-UNTrade, GTIS, FAS Cairo office research.

U.S.-origin food ingredients compete with European, Middle Eastern, and now also increasingly with African-origin exports. These origins maintain preferential trade arrangements with Egypt; which provide favorable tariff treatment. Shipping proximity to Egypt also often provides exporters in these countries an additional comparative advantage against U.S.-origin food ingredients (see [GAIN EGYPT \(EG 18002\) – Egypt's Food Processing Ingredients Competitive Landscape](#)).

Egypt maintains trade agreements with the European Union (EU), the Arab League (GAFTA), COMESA, and Turkey, facilitating preferential treatment within the Egyptian market. U.S.-origin products face a competitive disadvantage compared to EU- and/or Turkey-origin products.

**Egypt's Processed Food Industry:** Egypt's food processing and manufacturing sectors are price sensitive. Driving the sectors growth has been a shift to increased production for domestic consumption and exports. Egyptian consumer consumption of processed and manufactured foods (domestic production plus imports) in dollar terms has dropped from \$32 billion (EGP 180 billion at EGP 5.56 to \$1.00) in 2008 to now about \$25.1 billion (EGP 447 billion at EGP 17.79 to \$1.00) in 2017. The November 2016 devaluation of the Egyptian pound explains the drop in dollar terms. In Egyptian pound



terms, consumption has grown with compound annual growth rate of about 10.5 percent [2008-17] in tandem with population growth and increased domestic manufacturing. Food processors and manufacturers are taking advantage of Egypt's central location in the Middle East North Africa (MENA) region to export to nearby regional markets (see Appendix II – Egypt, Major Suppliers of Food Ingredients, Competitive Landscape, January- June 2018).

**Sector Trends:** Egypt's food processing and manufacturing sector in 2013-18 grew with a compound annual growth rate of about 18 percent. Post conservatively estimate sales at \$17 billion in 2018, however sources indicate that sales may range upwards to \$22 billion. The food processing and manufacturing sectors will grow during the 2018-21 period in Egyptian pound terms, albeit at a slower five percent rate.

Egypt's food processing and manufacturing sector is fragmented. A large number of companies manufacture food products such as edible oils, ready meals, soup, spreads, butter and margarine, flavored milk, chocolate confectionary, gum, ice cream and frozen desserts, and savory snacks. Industry sources estimate that manufacture food products sales at \$8 billion in 2018. Turnover in baked goods, processed fruit and vegetables, sauces, dressings and condiments, cheese, other dairy, sugar confectionary, sweet biscuits, and snack bars and fruit snacks by some estimates is about \$7 billion.

The production of other manufactured food products, namely breakfast cereals, processed meat and seafood, rice, pasta and noodles, baby food, and yoghurt and sour milk products remain dominated by larger manufacturers. Sales of these manufactured food products in 2018 amount to around \$2 billion.

#### **SECTION IV. BEST PRODUCT PROSPECTS CATEGORIES**

Egypt's imports of food and beverage ingredients and additives to continue to grow. Post attributes this growth to the expansion of the Egyptian food processing and manufacturing industry. Expansion is aided by the government imposing low to no tariff on these imported products (see Appendix III – Egypt, 5-Year Food and Agricultural Imports, 2013-18 (January-December)).

Corn (maize, other than seed corn) (Harmonized Tariff System – HS 1005.90), milk and cream (concentrated or sweetened) (HS 0402), food preparations (HS 2106), and odoriferous mixtures (HS 3302), are imported products high in demand. Other food ingredients such as frozen fish (no fish fillet or other fish meat) (HS 0303), tea (whether or not flavored) (HS 0902), black tea fermented and other partly fermented tea (HS 0902.40), and sunflower seeds (or safflower oil, crude) (HS 1512.11) although not imported in large quantities from the United States have nonetheless good potential.

The Egyptian government prohibits the importation and/ or utilization of food ingredients and additives (oils, fats, etc.) derived from non-halal origins and/ or those which contain alcohol, or pork products and its derivatives. For additional details, see Section II of the [FAIRS – EGYPT: Country Report 2017 – Narrative](#) and the [FAIRS – EGYPT: Export Certificate Report 2017 - Certification](#) reports.

The top consumer-oriented imports (all origins) in 2018 (January-June) were beef (\$463.5 million), beef livers (\$189 million), black tea (\$152 million), butter (\$91.4 million), milk and cream (\$85 million), food preparations NESOI (\$84 million), apples (\$58 million), and cheese NESOI including cheddar and Colby (\$48.4 million). Products present in the market, which have good sales potential, such as cheese,

infant formula, wine, peanut, bread flour, sauces, dressings, syrups, beef liver, black tea, food preparations, concentrated milk and cream, frozen chicken, and butter, continue to represent good prospects for U.S. exporters.

U.S.-origin products not present because they face significant barriers include fresh apples due to high tariffs and poultry parts (i.e., chicken leg quarters) due to non-tariff barriers.

## **SECTION V. KEY CONTACTS AND FURTHER INFORMATION**

U.S. Embassy Cairo, Foreign Agricultural Service (FAS) Office of Agricultural Affairs  
Mailing Address: American Embassy, 8 Kamal El-Din Salah Street, Garden City, Cairo, Egypt  
Phone: +20-2-2797-2388 • Fax: +20-2-2796-3989 • [AgCairo@fas.usda.gov](mailto:AgCairo@fas.usda.gov)

For additional information, see [www.fas.usda.gov](http://www.fas.usda.gov). See also [GAIN EGYPT \(EG 18034\) – FAIRS Annual Country Report 2018](#) and [GAIN EGYPT \(EG 18033\) – FAIRS Export Certificate Report 2018](#), as well as the [GAIN EGYPT \(EG 18028\) – Exporter Guide 2018](#) and the [GAIN EGYPT \(EG 18022\) – Food Service - Hotel Restaurant Institutional](#) reports.

## **TRADE ASSOCIATIONS**

### **Chamber of Food Industries**

Mailing Address: 1195 Nile Corniche, Boulaq, Cairo Governorate  
Phone: +20-2-2574-8627 • Fax: +20-2-2574-8312  
Cellphone: +20-122-7825232 and +20-122-782-5233 • [info@fei.org.eg](mailto:info@fei.org.eg)  
Website: <http://www.mvegypt.com/egycfi/en>

### **Egyptian Hotel Association**

Mailing Address: 8, El Sad El Aly St. Dokki- Giza- Egypt  
Phone: +20-2-3748-8468 • Fax: +20-2-3748-5083  
Email: [eha@egyptianhotels.org](mailto:eha@egyptianhotels.org) • Website: <http://www.egyptianhotels.org/Default.aspx>



**Egyptian Chefs Association**

Mailing Address: 20 Salem Street, Agouza, Cairo

Phone/Fax: +2 02 3762-2116 • +2 02 3762-2117 • +2 02 3762-2118

Email: [eca@egyptchefs.com](mailto:eca@egyptchefs.com) • Website: <http://www.egyptchefs.com/>

**Cairo Chamber of Commerce**

4 Falaki Square, Bab Ellok, Cairo Governorate

Phone: +20-2-2795-8261 and +20-2-2795-8262 • Fax: +20-2-2796-3603 and +20-2-2794-4328

Email: [info@cairochamber.org.eg](mailto:info@cairochamber.org.eg) • Website: [www.cairochamber.org.eg](http://www.cairochamber.org.eg)

**MINISTRIES AND GOVERNMENT AGENCIES****Ministry of Agriculture**

Mailing Address: 9 El Gamaa Street, Giza, Egypt

Phone: (+202) 3568-6373/ 1658

Website: [www.agr-egypt.gov.eg/](http://www.agr-egypt.gov.eg/)

**Ministry of Investment and International Cooperation**

Mailing Address: 3 Salah Salem Street, Cairo

Mailing Address: 8 Adly Street – Down Town, Cairo

Phone: +20-2-2405-5417 • +20-2-2391-0008 • +20-2-2390-8819 • +20-2-2393-5147

Email: [ministeroffice@miic.gov.eg](mailto:ministeroffice@miic.gov.eg)

**Ministry of Supply and Internal Trade**

Mailing Address: 99 Al Kasr Al Aini, Al Inshaa WA Al Munirah, Qasr an Nile, Cairo Governorate, Egypt

Phone: +20- 2- 2794-4338/ 8224/ 8184 • +20-2- 2795-8481 • [info@msit.gov.eg](mailto:info@msit.gov.eg)

Website: [www.msit.gov.eg](http://www.msit.gov.eg)

**Ministry of Trade and Industry**

Mailing Address: 2 Latin America, Garden City, Cairo

Commercial Affairs Phone: +20-2-2792-1207 • [mfti@mfti.gov.eg](mailto:mfti@mfti.gov.eg)

Website: <http://www.mti.gov.eg/English/Pages/default.aspx>

**General Organization for Export and Import Control**

Sheraton Al Matar, Heliopolis, Cairo

Phone: +20-2-2266-9627

Website: <http://www.goeic.gov.eg>

**Egyptian Customs Authority**

Ministry of Finance Buildings, Tower 3, Ramses Street Extension, Cairo Governorate

Phone: +20-2-2342-2247

Email: [info@customs.gov.eg](mailto:info@customs.gov.eg) • Website: <http://customs.gov.eg>

**General Authority for Veterinary Services**

Nadi El-Saeed Street, Dokki, Giza

Phone: +20-2-3748-1763

## APPENDIX I - Egypt, Food Ingredients Import HS Codes

Food Ingredients and Additives as Identified by the Egyptian Chamber of Food Industries (February 2018)	
HS Code	Description
0303	Fish; frozen, excluding fish fillets and other fish meat of heading 0304
0303.11	Fish; frozen, Pacific salmon, sockeye salmon (red salmon) ( <i>Oncorhynchus nerka</i> ),
0303.19	Fish; frozen, salmonidae, n.e.c. in item no. 0303.1, excluding fillets, fish meat of 0304, and edible fish offal of subheadings 0303.91 to 0303.99
0402	Milk and cream; concentrated or containing added sugar or other sweetening matter
0402.10	Dairy produce; milk and cream, concentrated or containing added sugar or other sweetening matter, in powder, granules or other solid forms, of a fat content not exceeding 1.5% (by weight)
0402.21	Dairy produce; milk and cream, concentrated, not containing added sugar or other sweetening matter, in powder, granules or other solid forms, of a fat content exceeding 1.5% (by weight)
0402.2191	Not less than 10K
0402.2991	Not less than 10K
0402.9119	Other
0402.9919	Other
0404.10	Dairy produce; whey, whether or not concentrated or containing added sugar or other sweetening matter
0404.9010	Dairy produce; whey, whether or not concentrated or containing added sugar or other sweetening matter in 10kgm packages or more
0405	Butter and other fats and oils derived from milk; dairy spreads
0405.1090	Other
0405.2090	Other
0405.9090	Other
0406	Cheese and Curd
0406.30	Dairy produce; cheese, processed (not grated or powdered)
0406.9010	Dairy produce; cheese (not grated, powdered or processed), n.e.c. in heading no. 0406, in 10kgm packages or more
0408	Birds' eggs, not in shell; egg yolks, fresh, dried, cooked by steaming or boiling in water, moulded, frozen or otherwise preserved, whether or not containing added sugar or other sweetening matter
0408.11	Eggs; birds' eggs, yolks, dried, whether or not containing added sugar or other sweetening matter
0408.91	Eggs; birds' eggs (not in shell, excluding yolks only), dried, whether or not containing added sugar or other sweetening matter
0801.11	Nuts, edible; coconuts, desiccated
0802.12	Nuts, edible; almonds, fresh or dried, shelled
0804	Dates, figs, pineapples, avocados, guavas, mangoes and mangosteens; fresh or dried
0804.10	Fruit, edible; dates, fresh or dried
0804.20	Fruit, edible; figs, fresh or dried
0806.20	Fruit, edible; grapes, dried
08.11	Fruit and nuts; uncooked or cooked by steaming or boiling in water, frozen, whether or not containing added sugar or other sweetening matter
0811.10	Fruit, edible; strawberries, uncooked or cooked by steaming or boiling in water, frozen, whether or not containing added sugar or other sweetening matter
0811.20	Fruit, edible; raspberries, blackberries, mulberries, loganberries, black, white or red currants and gooseberries, uncooked or cooked, whether or not containing added sugar or other sweetening matter
0811.90	Fruit, edible; fruit and nuts n.e.c. in heading no. 0811, uncooked or cooked, frozen whether or not containing added sugar or other sweetening matter
08.12	Fruit and nuts provisionally preserved; e.g. by sulphur dioxide gas, brine, in sulphur water or in other preservative solutions, but unsuitable in that state for immediate consumption
0812.10	Fruit, edible; cherries, provisionally preserved, but unsuitable in that state for immediate consumption
0812.90	Fruit, edible; fruit and nuts n.e.c. in heading no. 0812, provisionally preserved, but unsuitable in that state for immediate consumption
08.13	Fruit, dried, other than that of heading no. 0801 to 0806; mixtures of nuts or dried fruits of this chapter
0813.10	Fruit, edible; apricots, dried
0813.20	Fruit, edible; prunes, dried
0813.30	Fruit, edible; apples, dried
0813.40	Fruit, edible; fruit n.e.c. in heading no. 0812, dried
0813.50	Nuts, edible; mixtures of nuts or dried fruits of chapter 08
09.01	Coffee, whether or not roasted or decaffeinated; husks and skins; coffee substitutes containing coffee in any proportion
0901.11	Coffee; not roasted or decaffeinated
09.02	Tea

## APPENDIX I - Egypt, Food Ingredients Import HS Codes (continued)

0902.20	Tea, green; (not fermented), in immediate packings of a content exceeding 3kg
0902.40	Tea, black; (fermented) and partly fermented tea, in immediate packings of a content exceeding 3kg
1005.90	Cereals; maize (corn), other than seed
1103.11	Cereal groats and meal; of wheat
1103.13	Cereal groats and meal; of maize (corn)
1108.11	Starch; wheat
1108.13	Starch; potato
1109.00	Wheat gluten; whether or not dried
1208.10	Flours and meals; of soya beans
1301.20	Gum Arabic
1301.90	Natural gums, resins, gum-resins and oleoresins, n.e.c. in heading no. 1301
1302.19	Vegetable saps and extracts; n.e.c. in item no. 1302.1
1302.20	Pectic substances; pectinates and pectates
1302.31	Mucilages and thickeners; agar-agar, whether or not modified, derived from vegetable products
1302.32	Mucilages and thickeners; whether or not modified, derived from locust beans, locust bean seeds or guar seeds
1302.39	Mucilages and thickeners; whether or not modified, derived from vegetable products, n.e.c. in item no. 1302.3
1507.10	Vegetable oils; soya-bean oil and its fractions, crude, whether or not degummed, not chemically modified
1507.9099	Vegetable oils; soya-bean oil and its fractions, Other
1511.10	Vegetable oils; palm oil and its fractions, crude, not chemically modified
1511.9091	Vegetable oils; palm oil and its fractions, half refined, refined
1512.11	Vegetable oils; sunflower seed or safflower oil and their fractions, crude, not chemically modified
1512.1991	Vegetable oils; sunflower seed or safflower oil and their fractions, half-refined
1512.21	Vegetable oils; cotton-seed oil and its fractions; crude, whether or not gossypol has been removed, not chemically modified+B:BB95B:CB:D
1512.2991	Vegetable oils; cotton-seed oil half-refined
1513.11	Vegetable oils; coconut (copra) oil and its fractions, crude, not chemically modified
1513.199	Vegetable oils; conut (copra) oil and its fractions, other
1513.21	Vegetable oils; palm kernel or babassu oil and their fractions, crude, not chemically modified
1513.2991	Vegetable oils; palm kernel or babassu oil and their fractions, crude, not chemically modified, half-refined, refined sub
1514.11	Vegetable oils; low erucic acid rape or colza oil and its fractions, crude
1514.1990	Vegetable oils; low erucic acid rape oil and its fractions, for refining
1514.9990	Vegetable oils; low erucic acid colza oil and its fractions, for refining
1515.21	Vegetable oils; maize (corn) oil and its fractions, crude, not chemically modified
1515.299	Vegetable oils; maize (corn) oil and its fractions, crude, not chemically modified, other
1515.2991	Vegetable oils; maize (corn) oil and its fractions, not chemically modified, half-refined
1515.30	Vegetable oils; castor oil and its fractions, whether or not refined, but not chemically modified
1516.2010	Cocoa butter substitutes
1516.2090	Vegetable fats and oils and their fractions; partly or wholly hydrogenated, inter-esterified, re-esterified or elaidinised, whether or not refined, but not further prepared, cocoa butter substitutes, other
1517.1090	Margarine; mixes or edile preparations of animal and plant fat, greese, oil or from different fat, greese, oil particles in this chapter, not including edible fats, greese, oil in chapter 15.16
1517.9099.10	Mixes or edile preparations of animal and plant fat, greese, oil or from different fat, greese, oil particles in this chapter, not including edible fats, greese, oil in chapter 15.16
1701.11	Cane sugar crude, no coloring or nectars added
1701.12	Beat sugar crude, no coloring or nectars added
1702.1190	Lactose and Lactorse syrubb, other
1702.19	Sugars; lactose and lactose syrup, containing by weight less than 99% lactose, expressed as anhydrous lactose, calculated on the dry matter
1702.2090	Maltodextrin sugar less than 10%
1702.3090	Glucose
1702.9090	Dextrose
1801	Cocoa beans; whole or broken, raw or roasted
1803	Cocoa; paste; whether or not defatted
1804	Cocoa; butter, fat and oil
1805	Cocoa; powder, not containing added sugar or other sweetening matter
1806.20	Chocolate & other food preparations containing cocoa; in blocks, slabs or bars weighing more than 2kg or in liquid, paste, powder, granular or other bulk form in containers or immediate packings, content exceeding 2kg

## APPENDIX I – Egypt, Food Ingredients Import HS Codes (continued)

1905.31	Food preparations; sweet biscuits, whether or not containing cocoa
2007.99	Jams, fruit jellies, marmalades, purees and pastes; of fruit or nuts n.e.c. in heading no. 2007, cooked preparations (excluding homogenised), whether or not containing added sugar or other sweetening matter
2008.19	Nuts and other seeds; whether or not containing added sugar, other sweetening matter or spirit (excluding ground-nuts except in mixtures)
2009.9090	Juice Concentrates
2102	Yeasts (active or inactive); other single-cell micro-organisms, dead (but not including vaccines of heading no. 3002); prepared baking powders
21.06	Food preparations not elsewhere specified or included
2106.10	Protein; concentrates and textured protein substances
2106.9090	Food preparations; n.e.c. in item no. 2106.10, other
2401	Tobacco, unmanufactured; tobacco refuse
2710.19	Paraffin Oil
2712.20	Paraffin wax
2809.20	Phosphoric acid and polyphosphoric acids
2827.20	Chlorides; of calcium
2832.10	Sulphites; of sodium
2835.29	Phosphates; (other than of mono- or disodium, other than of potassium or of calcium hydrogenorthophosphate (dicalcium phosphate) and excluding other phosphates of calcium), whether or not chemically defined
2835.3990	Polyphosphates; sodium acid
2835.39	Polyphosphates; other than sodium triphosphate (sodium tripolyphosphate), whether or not chemically defined
2905.17	Alcohols; saturated monohydric, dodecan-1-ol (lauryl alcohol), hexadecan-1-ol (cetyl alcohol) and octadecan-1-ol (stearyl alcohol)
2905.32	Alcohols; acyclic, diols; propylene glycol (propane-1, 2-diol)
2905.45	Alcohols; polyhydric, glycerol
2906.11	Alcohols; cyclanic, cyclenic or cycloterpenic and derivatives
2912.41	Aldehydes; aldehyde-ethers, aldehyde-phenols and aldehydes with other oxygen function, vanillin (4-hydroxy-3-methoxybenzaldehyde)
2912.42	Aldehydes; aldehyde-ethers, aldehyde-phenols and aldehydes with other oxygen function, ethylvanillin (3-ethoxy-4-hydroxybenzaldehyde)
2915.50	Acids; saturated acyclic monocarboxylic acids; propionic acid, its salts and esters
2916.1900	Sorbate potassium
2916.2000	Cyclanic, cyclenic or cycloterpenic monocarboxylic acids, their anhydrides, halides, peroxides, peroxyacids and their derivatives
2916.31	Acids; aromatic monocarboxylic acids, benzoic acid, its salts and esters
2918.11	Acids; carboxylic acids, (with alcohol function but without other oxygen function), lactic acid, its salts and esters
2918.14	Acids; carboxylic acids, (with alcohol function but without other oxygen function), citric acid
2922.42	Amino-acids, other than those containing more than one kind of oxygen function, and their esters; glutamic acid and its esters; salts thereof
2923.20	Lecithins and other phosphoaminolipids, whether or not chemically defined
2924.2990.0	Aspartame
2924.2900.9	Other cyclic amides, their derivatives and their salts, ne
2925.11	Imides and their derivatives; saccharin and its salts
2930.9000.9	Other organo-sulphur compounds, nes
2932.29	Lactones, Other
2932.9900	Maletole
2934.9900.9	Dye sodium
2936.27	Vitamins; vitamin C and its derivatives, unmixed
3002.90	Toxins, cultures of micro-organisms (excluding yeasts) and similar products
3203.00	Colouring matter of vegetable or animal origin (including dyeing extracts, not animal black); whether or not chemically defined; preparations based on colouring matter of vegetable or animal origin
3204.19	Dyes; n.e.c., including mixtures of colouring matter of two or more of those from item no. 3204.11 to 3204.19
3301.25	Oils, essential; of mints (excluding peppermint), terpeneless or not, including concretes and absolutes
3302	Odoriferous substances and mixtures (including alcoholic solutions) with a basis of one or more of these substances, of a kind used as raw materials in industry; other preparations based on odoriferous substances, of a kind used for beverage manufacture

## APPENDIX I - Egypt, Food Ingredients Import HS Codes (continued)

3501.10	Casein
3502.11	Albumins; egg albumin, dried
3504.00	Peptones and their derivatives; other protein substances and their derivatives n.e.c. or included; hide powder, whether or not chromed
3505.10	Dextrins and other modified starches
3507.10	Enzymes; rennet and concentrates thereof
3802.90	Chemical products; activated natural mineral products, animal black, including spent animal black
3823.11	Industrial monocarboxylic fatty acids, acid oils from refining; stearic acid
3905.21	Vinyl acetate copolymers; in aqueous dispersion, in primary forms
3912.31	Cellulose ethers; carboxymethylcellulose and its salts, in primary forms
3913.10	Polymers, natural; alginic acid, its salts and esters, in primary forms
3913.90	Polymers, natural and modified natural; in primary forms (excluding alginic acid, its salts and esters)
4001.29	Rubber; natural (excluding latex, technically specified natural rubber and smoked sheets), in primary forms or in plates, sheets or strip

SOURCE: Chamber of Food Industries in Egypt (CFIE), FAS Cairo office research.

## APPENDIX II – Egypt, Major Suppliers of Food Ingredients, Competitive Landscape, January-June 2018

Product Category	Major Supply Sources	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
Corn (Maize), Other Than Seed Corn \$829.3 million	1. Ukraine - 43% 2. Argentina - 27% 3. Brazil - 19% <b>4. USA - 10%</b>	1. Competitive Price 2. Proximity 3. Trade Agreement Reduced Tariff	1. Price competitiveness 2. Lower Quality
Fish, Frozen (No Fish Fillet or Other Fish Meat) \$241.3 million	1. Netherlands - 23% 2. Japan - 21% 3. Brazil - 17% 4. Norway - 16% <b>8. USA - 2%</b>	1. Competitive Price 2. Proximity 3. Trade Agreement Reduced Tariff	1. Price competitiveness 2. Lower Quality 3. Limited Domestic Production
Tea, Wether or Not Flavored \$160.3 million	1. Kenya - 82% 2. India - 9% 3. Sri Lanka - 3% 4. UAE - 1% <b>16. USA - 0.02%</b>	1. Competitive Price 2. Proximity	1. Price Competitiveness 2. Limited Domestic Production
Butter and other Fats and Oils Derived from Milk \$133.6 million	1. New Zealand - 64% 2. India - 22% 3. United States - 3% 4. France - 3%	1. Competitive Price 2. Proximity 3. Trade Agreement Reduced Tariff	1. High Quality Output 2. Price Competitiveness 3. Limited Domestic Production
Milk and Cream, Concentrated or Sweetened \$132.4 million	1. New Zealand - 26% 2. Germany - 17% 3. France - 10% 4. Canada - 10% <b>7. USA - 6%</b>	1. Competitive Price 2. Proximity 3. Trade Agreement Reduced Tariff	1. High Quality Output 2. Price Competitiveness 3. Limited Domestic Production
Food Preparations Nesoi \$87.2 million	1. Ireland - 37% 2. United Kingdom - 8% 3. Netherlands - 7% 4. Denmark - 7% <b>5. USA - 4%</b>	1. Competitive Price 2. Proximity 3. Trade Agreement Reduced Tariff	1. Price Competitiveness 2. Limited Domestic Production
Sunflower-Seed or Safflower Oil, Crude, Fract, Etc \$77.6 million	1. Russia - 97% 2. Ukraine - 3% <b>9. USA - 0%</b>	1. Competitive Price 2. Proximity	1. Price Competitiveness 2. Limited Domestic Production
Odoriferous Mixture; Raw Mat'L For Indus & Bev Mfg \$72.3 million	1. Germany - 17% 2. Switzerland - 14% 3. India - 13% 4. Ireland - 11% <b>11. USA - 2%</b>	1. Competitive Price 2. Proximity 3. Trade Agreement Reduced Tariff	1. High Quality Output 2. Price Competitiveness 3. Limited Domestic Production
Cheese and Curd \$62 million	1. Netherlands - 27% 2. New Zealand - 24% 3. Poland - 11% 4. Ireland - 9% <b>8. USA - 4%</b>	1. Competitive Price 2. Proximity 3. Trade Agreement Reduced Tariff	1. Price Competitiveness 2. Limited Domestic Production
Coffee; Coffee Husks, Etc; Substitutes with Cofee \$59.6 million	1. Indonesia - 46% 2. Vietnam - 26% 3. Brazil - 8% 4. India - 5% <b>13. USA - 1%</b>	1. Competitive Price 2. Proximity 3. Trade Agreement Reduced Tariff	1. Price Competitiveness 2. Limited Domestic Production

Source: Global Trade Atlas, CAPMAS, FAS Cairo office research.



**APPENDIX III – Egypt, 5-Year Food and Agricultural Imports, 2013-18 (January-December)**

Description	United States Dollars (millions)										YTD Jan-Jun				% Change	% Change
	2013		2014		2015		2016		2017		2017		2018		2017/2018	2017/2018
	World	U.S.	World	U.S.	World	U.S.	World	U.S.	World	U.S.	World	U.S.	World	U.S.	World	U.S.
Total	\$14,318	\$1,713	\$11,597	\$2,034	\$10,628	\$1,234	\$9,886	\$959	\$8,825	\$947	\$3,934	\$465	\$5,000	\$939	27.1	101.84
Oil Seeds Etc.; Misc. Grain, Seed, Fruit, Plant Etc.	\$1,281	\$319	\$1,353	\$411	\$1,000	\$243	\$896	\$105	\$1,057	\$377	\$486	\$186	\$864	\$540	77.69	190.31
Meat And Edible Meat Offal	\$1,200	\$220	\$1,687	\$275	\$1,989	\$260	\$1,764	\$225	\$1,508	\$238	\$439	\$111	\$721	\$145	64.05	31.25
Cereals	\$4,663	\$607	\$5,237	\$812	\$4,316	\$324	\$4,103	\$217	\$3,820	\$86	\$1,901	\$41	\$1,945	\$87	2.32	114.68
Dairy Prods; Birds Eggs; Honey; Ed Animal Pr. NESOI	\$768	\$142	\$890	\$129	\$760	\$39	\$666	\$25	\$451	\$24	\$222	\$10	\$365	\$27	64.32	168.83
Edible Fruit & Nuts; Citrus Fruit Or Melon Peel	\$399	\$31	\$504	\$27	\$707	\$30	\$596	\$35	\$321	\$10	\$191	\$8	\$159	\$17	-16.74	112.6
Fish, Crustaceans & Aquatic Invertebrates	\$432	\$3	\$568	\$8	\$557	\$3	\$499	\$3	\$542	\$6	\$235	\$4	\$329	\$4	40.06	-2.95
Edible Vegetables & Certain Roots & Tubers	\$590	\$3	\$578	\$4	\$532	\$3	\$560	\$2	\$430	\$2	\$167	\$1	\$178	\$2	6.51	111.3
Live Animals	\$80	\$0	\$138	\$0	\$164	\$0	\$160	\$2	\$129	\$1	\$45	\$0	\$105	\$2	133.07	N/A
Lac; Gums,	\$28	\$2	\$22	\$1	\$23	\$1	\$24	\$2	\$17	\$1	\$8	\$1	\$10	\$0.46	28.33	-49.44

Resins & Other Vegetable Sap & Extract																
Live Trees, Plants, Bulbs Etc.; Cut Flowers Etc.	\$2	\$0	\$2	\$0	\$2	\$0	\$2	\$1	\$2	\$0	\$0	\$0.10	\$2	\$0.46	446.89	335.74
Coffee, Tea, Mate & Spices	\$495	\$0	\$528	\$1	\$502	\$0	\$535	\$0	\$477	\$0	\$199	\$0.11	\$279	\$0.43	40.23	243.16
Products Of Animal Origin, NESOI	\$25	\$0	\$41	\$0	\$30	\$1	\$30	\$0	\$34	\$0	\$19	\$0	\$26	\$0.38	34.34	N/A
Milling Products; Malt; Starch; Inulin; Wht. Gluten	\$42	\$1	\$45	\$1	\$42	\$1	\$49	\$1	\$34	\$0	\$20	\$0.13	\$16	\$0.09	-19.15	-26.76
Vegetable Plaiting Materials & Products Nesoi	\$4	\$0	\$4	\$0	\$4	\$0	\$3	\$0	\$3	\$0	\$1	\$0	\$2	\$0.01	18.64	N/A

OBS: Import values reported in Cost-Insurance-Freight (CIF) terms.

Source: Global Trade Atlas, FAS Cairo office research.