

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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POLICY

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Egypt

Retail Foods

2017 Annual

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Report Highlights:

The Egyptian population is young and growing. Demand for food products is high and expected to rise in the coming years. The economic policy reforms of late 2016 are having a positive impact on macroeconomic stability; however, at the micro-level consumers are struggling with increases in the cost of living and high inflation rates. The Egyptian retail food sector continues to be dominated by traditional markets, though supermarket chains are growing in number and popularity. Products from the United States face stiff competition from European suppliers and from processors in the Gulf region including Saudi Arabia and the UAE; however, opportunities exist for U.S. companies.

Executive Summary:

Egypt remains the largest consumer market and most diversified economy in the Arab world. With its young, growing population, increasing demand for food products is expected. The country faced an economic slowdown following the 2011 and 2013 regime changes, and subsequent decrease in tourism revenues. At the macro-level, the economic reforms put in place in late 2016 are beginning to yield positive results; however, individual consumers faced high inflation rates in 2017, which are impacting retail sales. In spite of the short-term adjustment, analysts expect improving economic growth and increasing purchasing power in the coming years.

Since 2014, Turkish BIM and Egyptian Kazyon supermarket chains have opened hundreds of small, new outlets across the country. These new outlets, which focus on lower income consumers, represent a small but growing percentage of the modern supermarket retail channel. They are expected to continue growing in the coming year. Yet, even with recent growth in modern supermarkets, the Egyptian retail food market is still dominated by small, privately held grocers, butchers, bakers, etc.

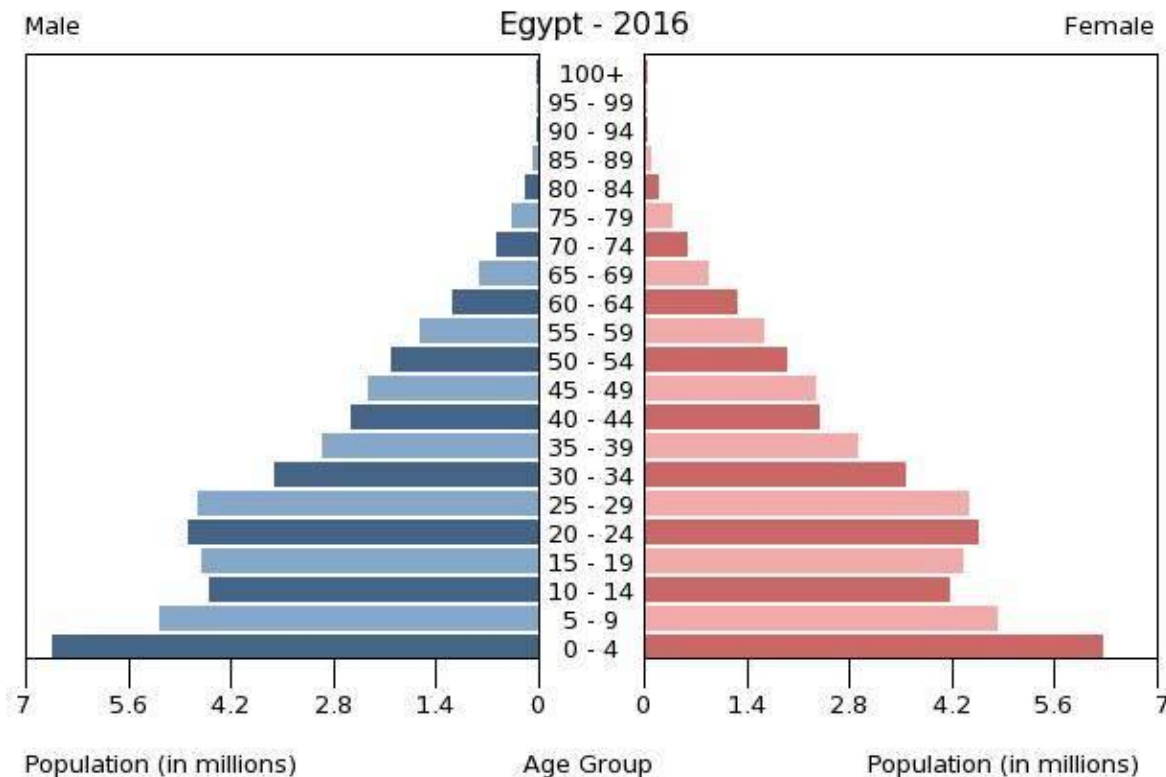
Products from the United States continue to face stiff competition from European and Gulf suppliers, both of which have duty-free access to the Egyptian market. For now, U.S. tree nuts, beef liver, and cheeses still represent the best growth prospects in Egypt.

SECTION I: MARKET SUMMARY

General Economy and Policy Environment

Egypt has one of the world's fastest growing populations. The Egyptian Central Agency for Public Mobilization and Statistics (CAPMAS) estimates Egypt's population at 93.4 million (August 2017), with a growth rate of 2.2 percent. At current rates, the population grows by close to 1 million people every six months. Egyptians are predominantly Muslim (around 90 percent), with many consumers respecting halal traditions regarding food and drink. The population is also quite young, with a median age of 25.3. Young consumers increasingly demand processed products and snack foods, trading tradition for convenience.

Figure 1: Egypt 2016, Population Distribution

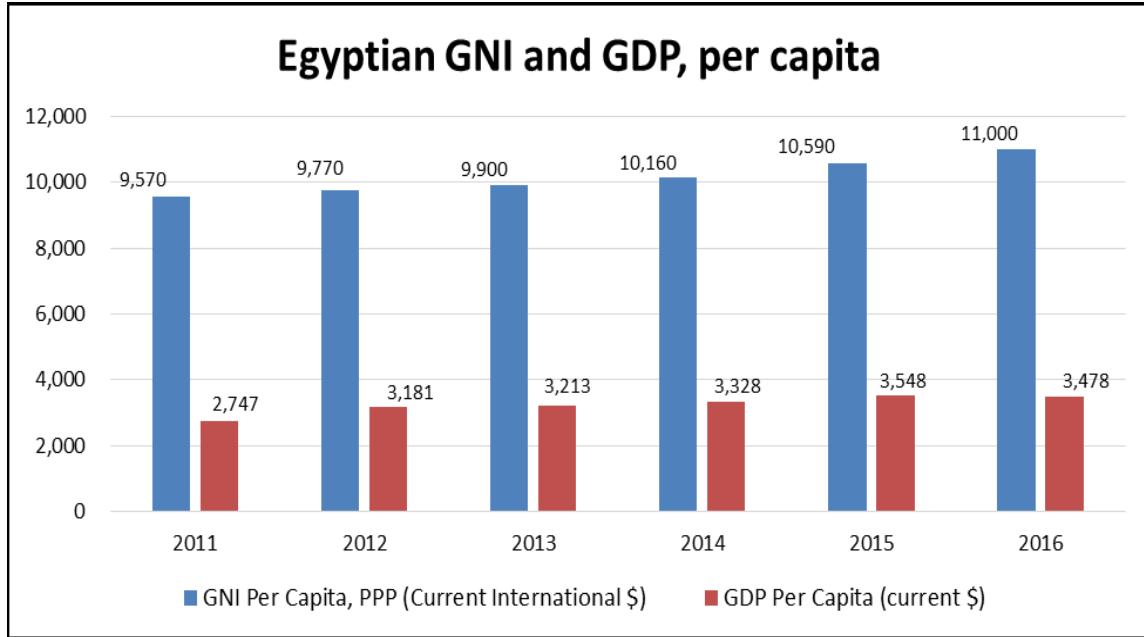


Source: CIA World Fact Book.

Egypt maintained a centralized planned economy into the 1970s, after which time subsequent administrations made gradual market reforms; though the state still plays a considerable role in the economy. Indeed, the state continues to be one of the largest importers of many bulk commodities, such as wheat, sugar and oils, as well as an important vendor of subsidized food products.

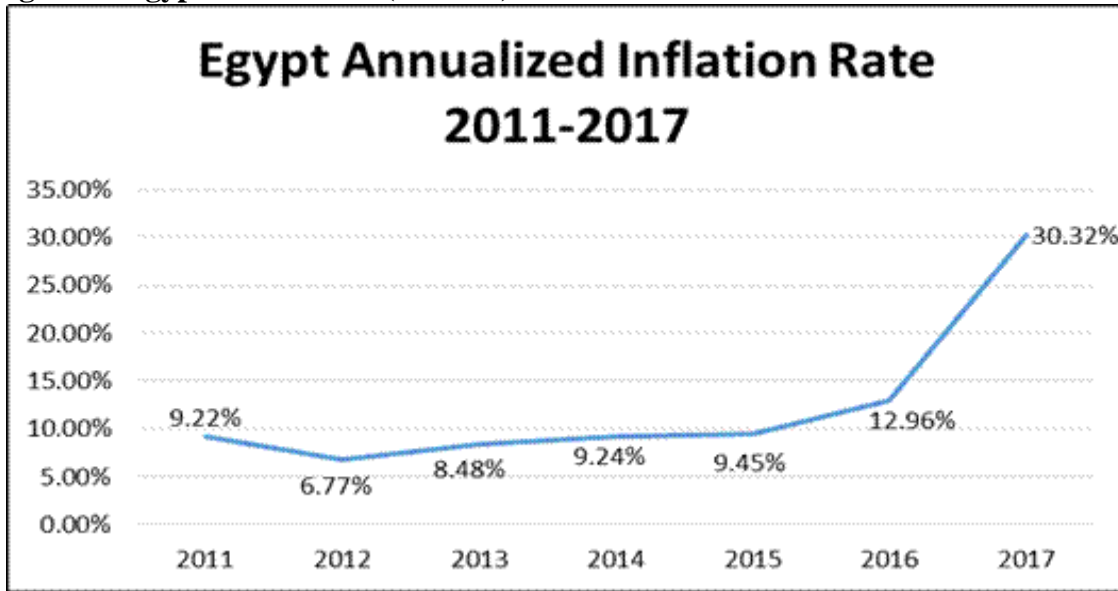
Following the 2011 revolution and subsequent political instability, there was a marked slowing of economic growth, much of which can be attributed to a decrease in tourism-related revenues. Since 2011, the country has been grappling with significant current account deficits, financed through foreign aid and loans. Throughout much of 2016, the government tried to manage the outflow of hard currency by reducing imports through technical barriers and capital controls. Unsurprisingly, these measures had an impact on consumer behavior, especially among low-income consumers.

Figure 2: Egyptian Income and GDP, per capita (2011-16)



Source: World Bank, FAS Cairo office research.

Figure 3: Egyptian Inflation (2011-17)



Source: Central Bank of Egypt, CY 2017 (January – November), FAS Cairo office research.

In November 2016, the Egyptian Central Bank allowed the Egyptian Pound (EGP) to float freely leading to a dramatic devaluation. Previously, the Egyptian Pound was pegged to the dollar at a rate of EGP 8.88 per \$1.00. After being first set to a reference price of EGP 13.75 per \$1.00, the value of the currency rapidly slid to around EGP 18.00; a cumulative decrease of 103 percent. In conjunction with the devaluation, the government of Egypt negotiated an Extended Fund Facility agreement with the International Monetary Fund. These measures in addition to a number of other policy shifts have helped

bolster investor confidence and reduce capital outflows. However, inflation has increased as a result of the devaluation. Official estimates put inflation at over 30 percent for 2017. This is in contrast to the inflation rate of 12.9 percent reported in 2016.

Per capita nominal gross domestic product (GDP) in 2016 was US \$3,478 in current dollars, and unemployment rates stood at about 13.0 percent.

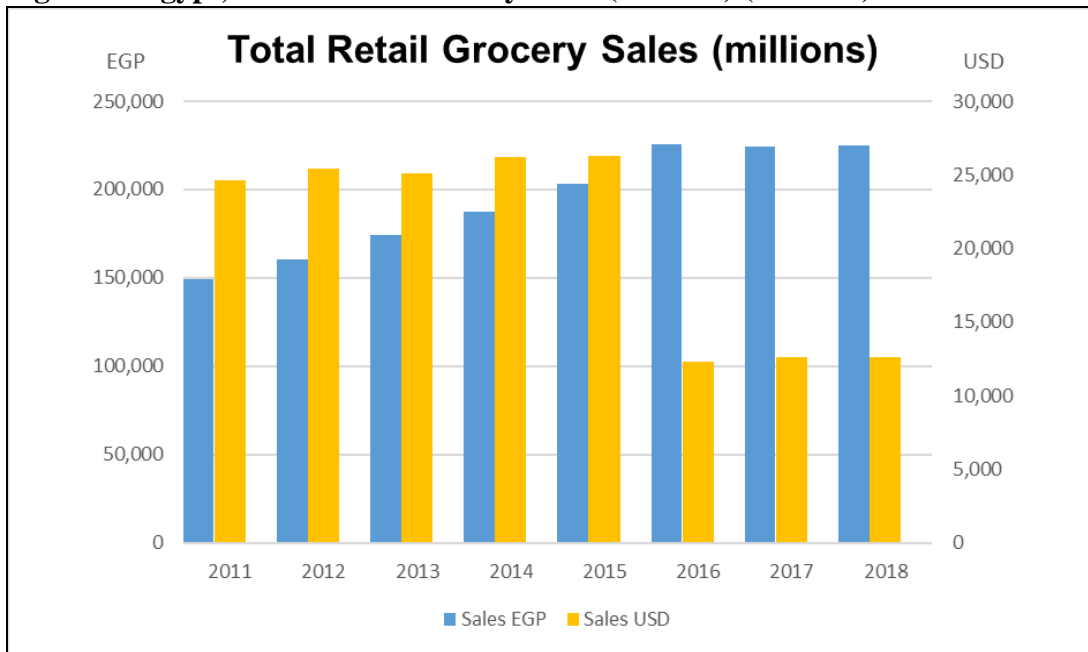
Market Overview

Egypt remains the largest market and most diversified economy in the Arab world, and in the coming years, Egyptian demographic trends will continue to bolster spending. In the near term, inflationary pressures may limit growth. In spite of the immediate inflationary pressures, overall purchasing power is still expected to increase overtime, facilitating consumer purchases of imported food products.

According to the Economist Intelligence Unit, food, beverage and tobacco sales in 2016 were estimated at \$92 billion, or approximately \$999 per capita. That number is expected to rise to \$114 billion by 2020. Total retail food sales made up \$70 billion of that total in 2015, but are expected to rise to \$98 billion by 2020. Note that the categorization of products used by the Economist is more inclusive than that discussed in later sections.

In terms of retail food sales from traditional grocers and markets, supermarkets, and convenience stores, the 2016 total value of retail food sales stood around EGP 226 billion. This is an increase of 11 percent over 2015. Private sector forecasts project similar growth into 2017 with sales reaching EGP 250 billion. Note that the 2016 devaluation forced sales down in dollar-terms while sales in nominal terms remain steady.

Figure 4: Egypt, Total Retail Grocery Sales (2011-18) (millions)



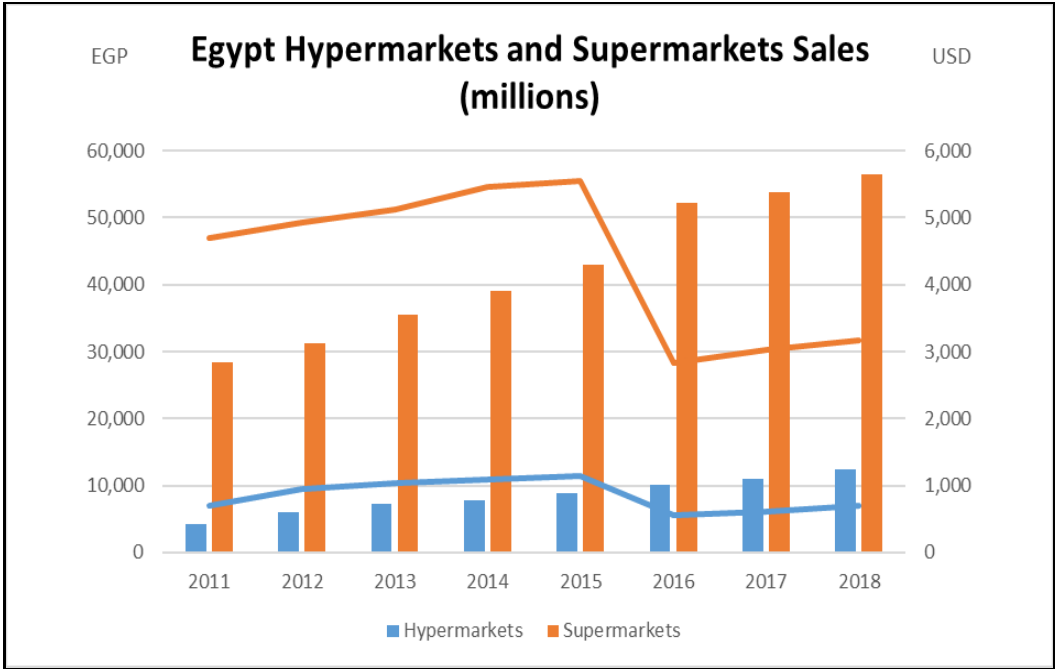
Note: The effects of the 2016 devaluation can be seen by the decrease in sales in U.S. dollar-terms.

Source: Euromonitor, FAS Cairo office research.

Supermarkets/Hypermarkets

By the end of 2017, food sales at hypermarkets are expected to have doubled from their 2011 level, while supermarkets will preserve their steady growth. The growth in sales is accompanied by a large increase in the number of small-scale supermarket outlets, with the rapid expansion of Turkish retailer BIM and Egyptian Kazyon over the past three years. In spite of the rapid growth, modern supermarket chains still accounted for less than one percent of the establishments and a quarter of total sales in 2017. The hypermarket segment remains small with only 37 outlets operating in the country in 2017. Those outlets account for 4.9 percent of total retail sales. Sales in modern supermarket and hypermarket chains are expected to continue to grow. Figure 5 compares hypermarket and supermarket sales, including 2018 forecasts.

Figure 5: Egypt, Hypermarket and Supermarket Retail Sales (2011-18) (millions)

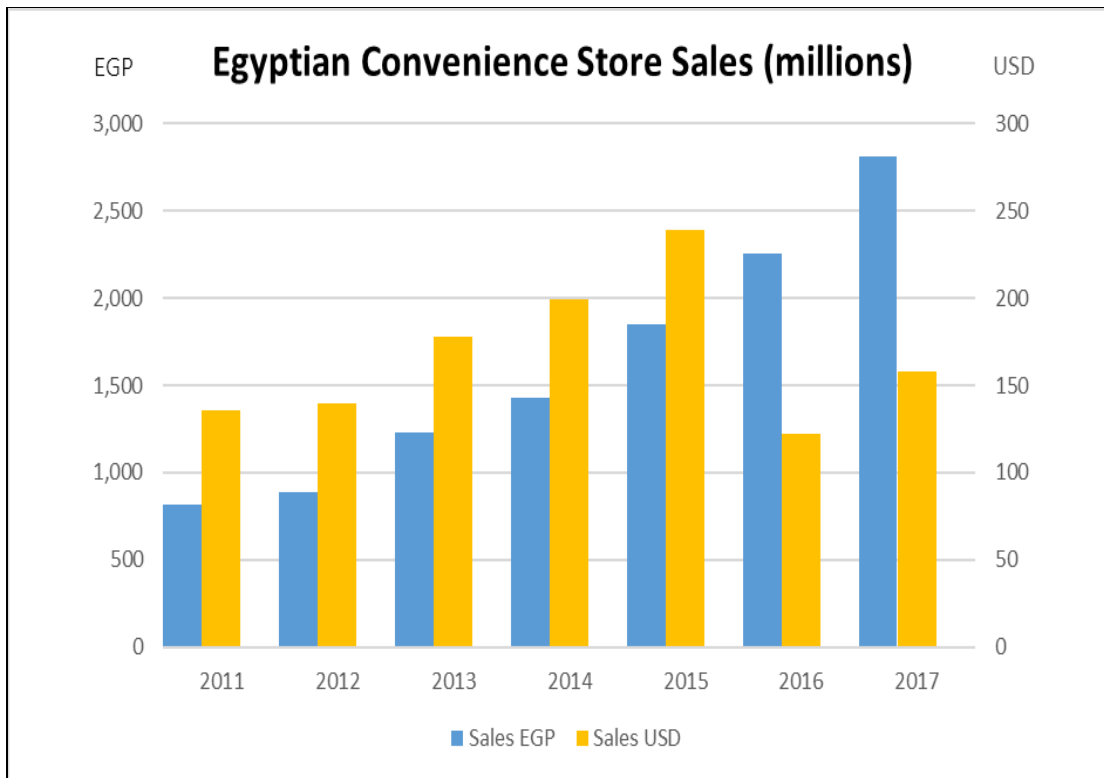


Note: Egyptian pounds (EGP) sales are denoted by bars, while U.S. dollar (USD) sales are illustrated by lines. The effects of the 2016 devaluation can be seen by the decrease in sales in U.S. dollar-terms. Source: Euromonitor, FAS Cairo office research.

Convenience stores

Convenience stores saw strong growth in retail sales with a notable increase of 21.5 percent in 2016. Much of this growth was due to an increase in the number of outlets. The market has seen growth in stand-alone convenience stores (kiosks) and convenience stores associated with gasoline stations over recent years. Industry observers expect that the number of these outlets will continue to grow. Figure 6 illustrates growth in convenience store sales.

Figure 6: Egypt, Convenience Store Sales Growth (2011-17) (millions)



Note: The effects of the devaluation can be seen by the decrease in U.S. dollar (USD) sales after 2015.
 Source: Euromonitor, FAS Cairo office research.

Traditional Grocers and Markets

The Egyptian retail market continues to be dominated by traditional grocers and wet markets. Together these categories represent 97 percent of total retail grocery firms and 70 percent of total sales. As many as 115,041 individual grocery firms exist throughout the country. These retailers tend to be located in densely-populated urban centers and include small grocers, butchers, fruit/vegetable markets and bakers that supply subsidized bread, among other products. This retail segment maintains a loyal, neighborhood customer base as they are easily accessible and sometimes offer credit to local consumers. The segment is clearly constrained by space (retail and parking) and is unable to compete with larger retailers who can take advantage of economies of scale.

Market Outlook

Beginning in late 2016, price inflation and subsequent impacts on consumer behavior led to a stall in the growth of the grocery retail sector. The number of outlets decreased around 0.9 percent during 2017, while sales shrunk around 0.5 percent in nominal terms. Among the modern retailers, growth rates in terms of outlets and sales remained positive during 2017, leaving most of the contraction to traditional retailers. Both modern and traditional outlets are forecast to recover in 2018. Analysts expect to see larger chain supermarkets continue to take market share from traditional privately-owned grocers and wet markets. This market shift can be explained by efficiency and added scale employed by larger chains. Table 1 outlines the number of grocery outlets by category.

Table 1: Egypt, Number of Outlets by Category (2011-17)

	2011	2012	2013	2014	2015	2016	2017
Convenience Stores	158	167	178	192	209	229	253
Hypermarkets	19	23	27	29	31	35	37
Supermarkets	609	624	741	763	845	1,056	1,215
Traditional Retailers	110,029	110,944	111,664	112,872	114,359	116,092	115,041
Total Grocery Retailers	113,092	114,058	114,928	116,194	117,804	119,795	118,953

Source: Euromonitor, FAS Cairo office research.

Egyptian retail sector growth can be attributed to a young growing population and gradually increasing purchasing power. The political unrest in 2011 and 2013 negatively affected incomes and subsequent purchasing power. Income growth rates have been recovering in recent years, reaching 2.6 percent in 2015, their highest rate since 2008. High levels of inflation in 2017 are having a dampening effect on income growth rates; however, continued recovery is expected as inflation rates stabilize into 2018. Concomitantly, GDP levels show moderate but steady increases over the last decade.

As long as the political and economic situations remain stable, retail growth is expected to continue or increase. In the last two years, the government has consolidated political power and ensured a stable security environment within the population centers, which is positive for continued growth.

Table 2: Advantages and Challenges

Advantages	Challenges
<ul style="list-style-type: none"> • U.S.-origin products continue to enjoy wide acceptance in the Egyptian market. • U.S. products are associated with high quality. • New-to-market products benefit from the recent expansion of supermarket and hypermarket chains. • Receptivity toward buying the notion of American luxury. 	<ul style="list-style-type: none"> • Higher tariffs often levied on imported consumer-oriented products. • Many importers indicate that there is a lack of U.S. supplier interest in Egypt. • Egyptian import regulations are at times non-transparent. • Egyptian importers are largely unfamiliar with U.S. export procedures and certifications. • The absence of cold storage facilities outside of Cairo and Alexandria. • The slowly rebounding tourist trade. • Proximity to competing suppliers.

SECTION II: ROADMAP FOR MARKET ENTRY

Entry Strategy

Firms interested in exporting to Egypt should begin by identifying an Egyptian importer or distributor, with whom they can build a relationship. These Egyptian firms are best suited to navigate local regulations, understand distribution chains and have relationships with food retailers. Some larger retailers import directly; however, the lion's share of small and medium retailers work through importers. Before entering the market, exporters should:

- Research potential opportunities by reviewing FAS policy and market reports, as well as private sector analyses. Consider the use of a marketing firm for additional analysis of market opportunities.
- Determine if the product has market access and is subject to registration requirements or customs duties.
- Consider landed price point, being cognizant that local transportation costs and customs duties may impact competitiveness.
- Establish a relationship with a local importer or distributor. Egyptian communication norms are not the same as those in the United States. Many importers or distributors may prefer to communicate via telephone calls or in-person visits, rather than email.
- Exporters should expect to work with consolidated shipments initially, until importers can gauge a new product.
- Be willing to meet Egyptian labeling and registration requirements. Information on product registration can be found within our [FAIRS – EGYPT 2016 Annual report](#) (revised versions of our FAIRS Narrative and Certificate reports will be available in late December 2017).
- For products with longer shelf life, or large order volumes, exporters may consider working through regional consolidators based in Europe or the Gulf states.

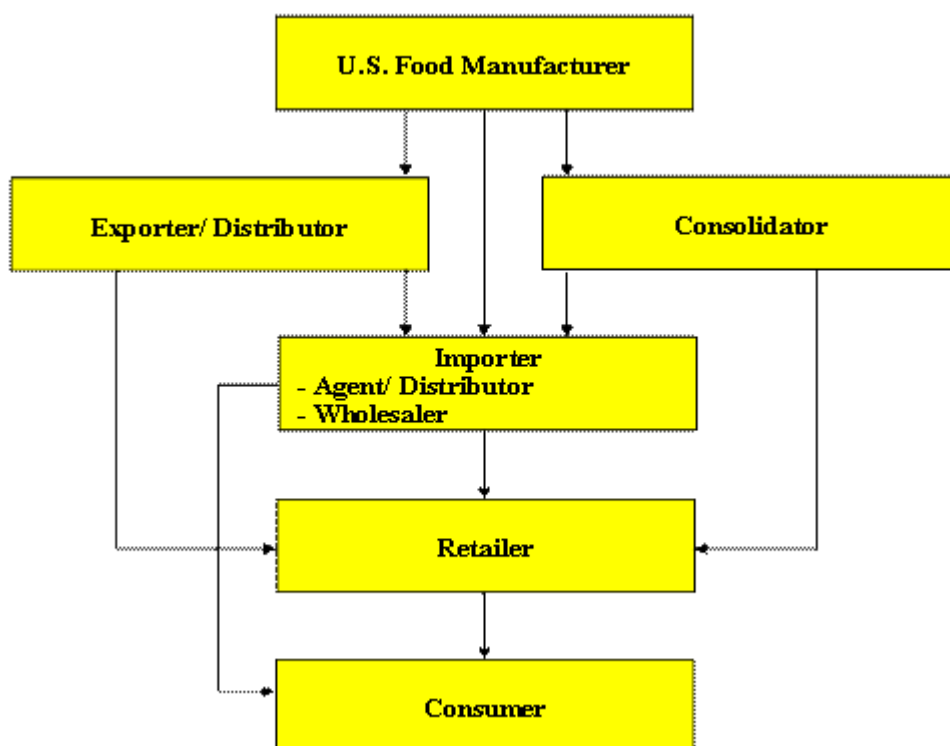
Participation in trade shows also offers a good opportunity to better understand the market and potentially interact with potential importers or distributors. FAS Cairo organizes Egyptian delegations to participate in [Gulfood](#), which attracts buyers and sellers from around the world. Normally Egyptian importers attend the Gulfood show. The Food Africa show, held in April in Cairo, draws buyers and sellers from many African and European countries and presents an excellent opportunity for U.S. firms to interact with Egyptian and regional partners.

Specific retail products exported to Egypt do require registration prior to shipment. The registration requirements are not particularly onerous for producers of food and agricultural products, and U.S. firms are typically able to register with minimal delays. Exporters should work closely with their Egyptian partners to meet these requirements. Details on export registration, including a full list of products subject to these requirements, can be found in the [FAS GAIN Report](#) on product registration.

FAS Cairo is not able to mediate contractual disputes or act as a collection agent when payment or delivery problems arise. This office can recommend local legal services; however, these situations can typically be avoided. For firms and products that qualify, the U.S. Export Import Bank provides exporter insurance and USDA's Export Credit Guarantee Program (GSM-102) is used to facilitate agricultural exports to Egypt.

Market Structure

Basic Flow of Imported Food Products



Retail supermarket and hypermarket chains maintain their own distribution systems, using modern warehouses as distribution centers. Depending on arrangements, some imports are handled directly by the supermarket chain’s head office, their identified importer, or by branches themselves. For example, Carrefour buys some of its beef directly from private processing plants that import live beef cattle for local slaughter. Importers sometimes sell their goods to wholesalers, who in turn distribute imported food products to retail outlets. Of course, many importers sell directly to retailers.

Supermarket and Hypermarket Profiles: Throughout Egypt, modern supermarket and hypermarkets are growing in number and in sales. Despite their recent growth, in 2016 total supermarkets and hypermarket outlets were 1,252 outlets of 118,953 total grocery outlets and represented only one percent of the total, being massively outnumbered by traditional markets at 115,041 outlets. In 2016 modern hypermarkets and supermarkets combined make up 29 percent of all retail grocery sales.

Table 3: Egypt, Supermarket/Hypermarket Profiles (2016)

Retailer Name and Outlet Type	Ownership	2016 Sales EGP Millions	No. of Outlets	Locations	Purchasing Agent Type
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BIM	BIM LLC	11,522.0	256	Nationwide	N/A
Kazyon	Tawfeer for Food Products	8,8371.0	182	Nationwide	N/A
Carrefour	Majid Al Futtaim	4,920.0	29	Cairo Alexandria	Direct Importer
Ragab Sons	Ragab Sons for Trade	2,956.0	54	Nationwide	Direct Importer
Metro Fresh Foods Kheir Zaman	Mansour Manufacturing and Dist.	2,697.0	66	Nationwide	Direct Distributor
Spinneys	Spinneys Egypt Ltd	1,551.0	4	Cairo	Direct
El Nil Al Masria Al Ahram	Holding Co. for Food Industries	986.0	352	Nationwide	Government
Fathallah Gomla	Fathallah Gomla Market	701.0	24	Cairo Alexandria Hurghada	Direct Importer Wholesaler
Seoudi Market	Seoudi Co	482.0	11	Cairo	N/A
Alfa Market	Alfa Market SAE	462.0	6	Cairo	Direct Importer

Source: Euromonitor, FAS Cairo office research.

It is worth noting that the two largest retailers in 2016 were both newcomers to the Egyptian market. The Turkish BIM chain and local Kazyon stores have both registered massive growth since their initial arrival to the Egyptian market. Kazyon opened its first store in November 2014 and now has 182 branches in 14 governorates. Similarly, BIM first opened in 2013 with 46 new stores. As of August of 2017, BIM claims 256 branches in 11 governorates. Both firms have plans for continued expansion.

Convenience Store Profiles: The Egyptian convenience store sector is thriving, becoming an increasingly important venue for food retail in recent years. The sector currently has 229 locations, and is expected to grow the number of locations by 10 percent in 2017. Exxon-Mobil is the leader in this sector, with 138 outlets, or 54.5 percent of the total. Exxon-Mobil's brands, such as Mobil Market, Esso Snack and Shop, and On the Run are normally associated with service stations and offer snacks, drinks, and ready-to-eat foods. Similarly, Emarat Misr, and a La Poire, a local confectioner, are also locating convenience stores in or near gas stations. Table 4 lists the top five convenience stores by 2016 sales.

Table 4: Egypt, Convenience Store Profiles (2016)

Retailer Name and Outlet Type	Ownership	2016 Sales EGP Millions	No. of Outlets	Locations
Mobil Market	ExxonMobil Corp.	672.4	138	National

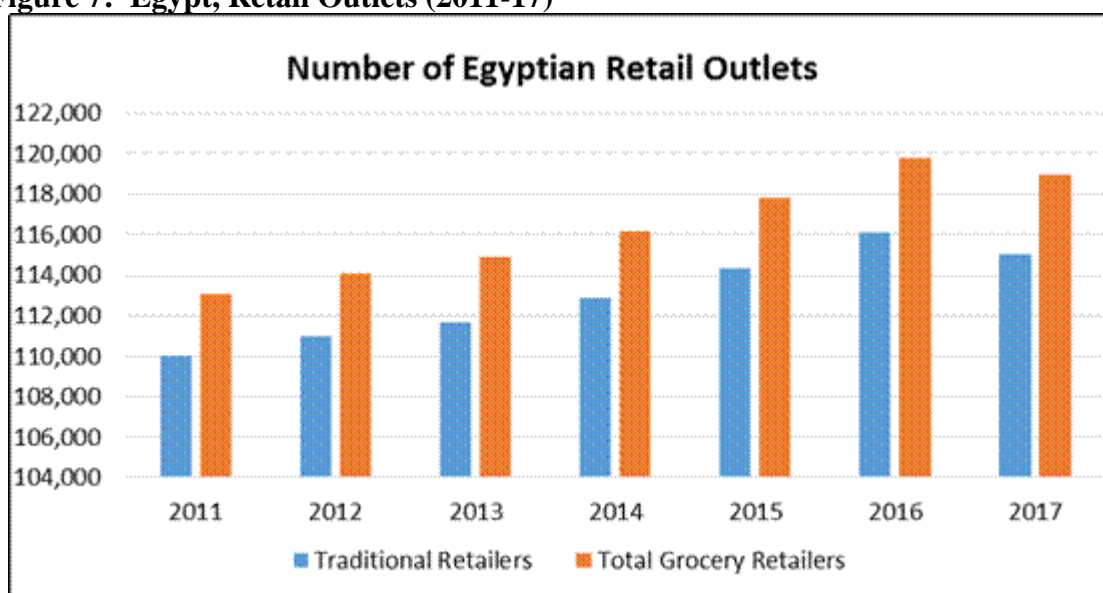
Esso Snack and Shop On the Run				
La Poire	A La Poire	96.3	25	National
Emarat Misr	Emirates General Petroleum Co	65.7	6	Cairo Alexandria
Total	Total SA	56.5	10	
7 Mart	7 Mart	46	4	Cairo

Note: Post is not summing the number of outlets given the possibility of double counting of retailers. In some cases two retailers occupy the same space. For example, a La Poire outlet may also be attached to an On the Run store.

Source: Euromonitor, FAS Cairo office research.

Traditional Market Overview: Egyptian traditional markets dominate retail food sales in Egypt. These firms include small mom-and-pop grocers, butchers, bakers, and the like. In 2017 the total number of retailers contracted; however, growth rates of traditional markets are slowing faster than modern outlets. Figure 7 contrasts the overall number of food retailers with the number of traditional markets. The 2017 forecasts expect the total number of retail outlets to decline, which is likely explained as market adjustment following the 2016 macroeconomic policy shifts.

Figure 7: Egypt, Retail Outlets (2011-17)



Source: Euromonitor, FAS Cairo office research.

SECTION III: COMPETITION

Imported food products in the Egyptian retail market face heavy competition from domestic and imported products. Egyptian snack producers fill much of the domestic demand for chips, crackers and

cookies, though imported brands are perceived as being of higher quality. Egypt produces a wide variety of horticulture products, most of which is sold on the domestic market as fresh or further processed product. Similarly, Egyptian production of animal products meets much of the domestic demand. In the cases of fluid milk and eggs, domestic production fully meets demand. Some beef and chicken is imported; however, U.S. poultry parts (i.e., chicken leg quarters) remain blocked from the Egyptian the market.

Egypt has trade agreements with the European Union (EU), the Arab League (GAFTA), COMESA and Turkey, allowing these partners preferential treatment to the Egyptian market. As such, many U.S. products will face a competitive disadvantage to comparable products produced in the EU or Turkey. The United States remains highly competitive in tree nuts and specific beef products, most notably beef liver and offal.

Exports of a number of U.S. products decreased noticeably in recent years. These decreases are tied to a strong U.S. dollar, Egyptian capital controls throughout much of 2016, and significant competition from the EU and others. In 2015, exports of dairy products, excluding cheese, decreased by 65.6 percent, U.S. exports of cheese decreased 90.4 percent, and exports of apples decreased by 19.3 percent. These losses were generally offset by increased imports from the European Union.

Table 5: Egypt – Major Imports and Competing Suppliers (2016)

Product Category	Major Supply Sources	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
Snack Foods Imports: 23,899	1. UAE – 26.6% 2. Turkey – 15.8%	Duty-free access Proximity	Lower quality More price competitive

MT \$33.5 million	3. Italy – 9.14 7. USA – 5.5% (82.54% increase from 2015)		
Breakfast Cereals Imports: 2,275 MT \$3.7 million	1. Poland – 20.43% 2. Turkey – 16.4% 3. France – 12.5% 4. USA – 11.9% (45% increase from 2015)	EU duty-free access	Imports perceived to be better quality
Beef and Offal Imports: 129,716 MT \$1,459.0 million	1. Brazil – 50.36% 2. India – 32.22% 3. USA – 13.42%	Low cost of production (India/Brazil)	Limited domestic stock
Dairy (excl. cheese) Imports: 211,870 MT \$513.7 million	1. New Zealand – 51.22% 2. France – 7.22% 3. Germany – 7% 4. USA – 4.38%	Low cost of production (NZ) EU duty-free access	Limited domestic production
Cheese Imports: 30,678 MT \$124 million	1. Netherlands – 33.32% 2. New Zealand – 17.21% 3. Poland – 14.73% 11. USA – 0.77%	Low cost of production (NZ) EU duty-free access	Domestic production does not meet demand
Fresh Apples Imports: 10,320 MT \$350.3 million	1. Italy – 36.82% 2. Greece – 19.53% 3. Poland – 13.03% 18. USA 0.02%	EU duty-free access Proximity	No domestic production
Processed F&V Imports: 55,934 MT \$85.2 million	1. Turkey – 16.64% 2. China – 9.8% 3. Greece – 6.44% 6. USA – 5.3%	Duty-free access Low costs of production	Large domestic industry Distribution/quality issues
Fish & Seafood Products Imports: 359,503 MT \$648.8 million	1. Thailand – 27.13% 2. Netherlands – 13.2% 3. Vietnam – 6.6% 23. USA – 0.42%	Duty-free access	Large domestic tilapia production Limited production of marine varieties
Tree Nuts Imports: 2,509 MT \$88.7 million	1. USA – 36.2% 2. Turkey – 16.8% 3. Sri Lanka – 11.4%	Three major importers supply different products	Limited domestic production
Beverages (non-alcoholic) Imports: Quantity N/A \$141.4 million	1. UAE – 40.96% 2. Spain – 11.93% 3. Saudi Arabia – 6.46% 20. USA – 0.47%	Duty-free access (Arab Union)	Limited domestic production
Pet Food Imports: 5,591 MT \$7.3 million	1. Germany – 27.14% 2. France – 23.27% 3. USA – 13.11%	EU duty-free access	Limited local production

Source: CAPMAS, FAS Cairo office research.

SECTION IV: BEST PROSPECTS

Exports of tree nuts, dairy products, and beef products continue to represent the best prospects for U.S. exporters focused on doing business in Egypt. Bulk walnuts and almonds both represent good prospects for U.S. exporters, as competition is minimal and demand remains strong. U.S. pistachios are also competitive, though low-cost regional competition does exist. Egypt is a net importer of processed dairy products, and U.S. products may be competitive based on exchange rates and other considerations. Though volumes were down in 2015, U.S. aged cheeses and powdered products (nonfat dry milk, whole milk powder, and whey protein) were generally competitive. Egypt remains an important market for U.S. beef liver and offal. The country remains, by far, the largest importer of U.S. beef liver. U.S. beef muscle cuts are well known for their quality among affluent buyers.

Table 6: U.S. Best Prospects - Products with Continued Sales Potential (2016)

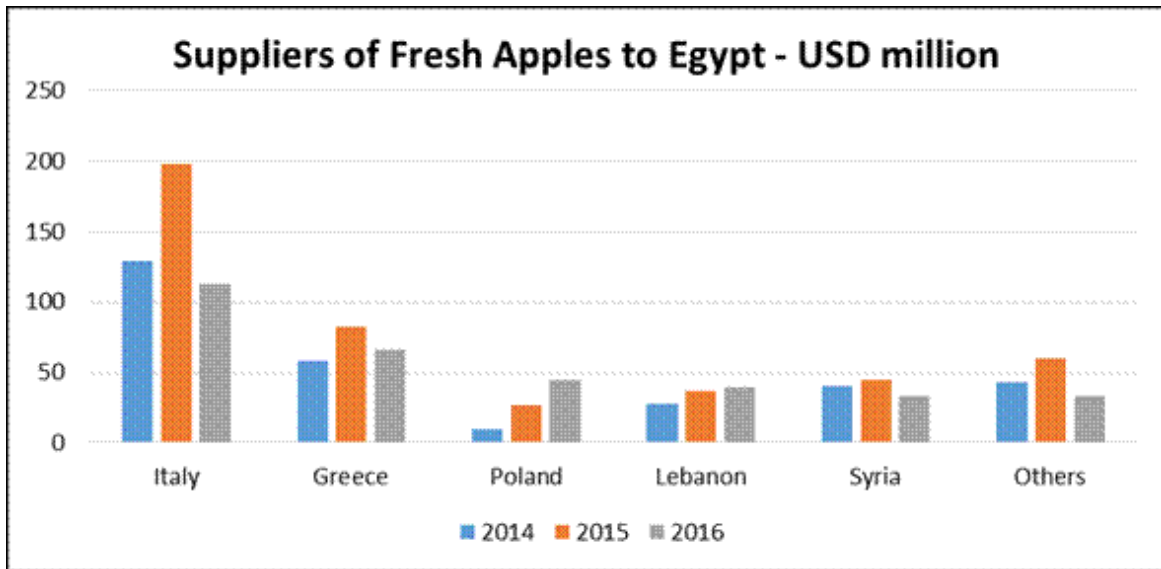
	CY 2016 Value (\$ million)	CY 2016 Quantity (MT)	Growth by Value	Average Applied Import Duty	Key Constraints
Almonds	\$20.2	418	28%	20%	Competition from UAE, India, Lebanon, Syria, Turkey
Walnut	\$8.28	59	74%	20%	Competition from India, Vietnam, Maldives, Syria
Hazelnuts	\$1.5	45	39%	20%	Competition from Turkey, Georgia, Romania
Processed Dairy	\$22.5	10,681	-78%	16.7% - Concentrated 0-6% - In solid forms (varies by fat content) 0-1.8% - Whey	Competition from New Zealand.
Cheese	\$1.0	298	-96%	10% - Fresh, Grated, Powdered, Processed Cheese	Competition from EU, New Zealand. Access for EU.
Beef/Offal	\$195.7	6,680	-29%	0%	Relatively high price compared to competitors on muscle cuts.

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

Products with Declining Market Share

Traditionally, Egypt imported apples from regional markets, primarily Syria and Lebanon. Egyptian importers also brought in higher-value, U.S.-origin apples, making the United States the third largest supplier with nine percent of the market share until 2009. With the signing of the EU-Egypt trade agreement in 2011, European apple suppliers gained duty-free access to the Egyptian market; U.S. apples face duties of 20-35 percent. Shipments of apples from the EU, namely Italy and Greece, flooded the market and decimated U.S. sales. In 2016 the tariff on apples was raised to 40 percent. FAS Cairo estimates that decreasing the duties on U.S.-sourced apples to their previous rate of 20 percent, would lead to an increase in U.S. apple exports of up to 4,000 metric tons per year.

Figure 8: Suppliers of Fresh Apples to Egypt (2014-16)



Source: FAS - UNTrade, FAS Cairo office research.

In a similar trend to apples, U.S. exports of snack foods are quickly losing market share to their European competition. The U.S. market share has decreased from over three percent in 2009 to less than two percent in 2015. With this decrease is a concomitant increase in the market share controlled by European exporters, primarily the United Kingdom, Italy, Belgium, and Spain. Tariff rates on U.S.-origin products in this category range from 15-30 percent, while EU exporters enjoy duty-free status.

Products Not Present Due to Barriers

Imports of poultry from the United States were first blocked from the Egyptian market in the early 1990s. The policy shifted in 2006, allowing the import of frozen, whole birds, but not chicken parts. The ban on chicken parts remains active. Egyptian authorities have listed numerous rationales for their de facto ban on U.S. chicken parts, including Halal concerns, avian influenza, and mixing or contamination of meat with other avian species. The domestic poultry industry is known to be politically well connected and typically opposes imports.

Egypt imports frozen, whole chicken from Brazil, Ukraine, and India. Brazil is the largest exporter of frozen, whole chicken to Egypt, shipping \$115 million in product in 2016. Frozen, whole birds from the United States are not price-competitive in Egypt. Additionally, the larger size of U.S. birds makes them less attractive to Egyptian consumers, who are accustomed to chickens weighing 900-1,200 grams.

SECTION V: POST CONTACT AND FURTHER INFORMATION

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For additional information, see www.fas.usda.gov. See also our Food and Agricultural Import Regulations and Standards (FAIRS) reports, FAIRS Export Certificate, Food Processing Ingredients Sector, and HRI Food Service Sector [GAIN 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
Website: <http://www.mvegypt.com/egycofi/en>

Ministries and Government Agencies

Ministry of Trade and Industry

Mailing Address: 2 Latin America, Garden City, Cairo
Commercial Affairs Phone: +20-2-2792-1207 • mfti@mfti.gov.eg
Website: <http://www.mti.gov.eg/English/Pages/default.aspx>

Ministry of Investment and International Cooperation

Mailing Address: 3 Salah Salem Street, Cairo
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Phone: +20-2-2405-5417 • +20-2-2391-0008 • +20-2-2390-8819 • +20-2-2393-5147
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Ministry of Supply and Internal Trade

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

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Phone: +20-2-3568-6373/ 1658
Website: www.agr-egypt.gov.eg/