

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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## Egypt

### Retail Foods

#### 2016 Annual

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**Report Highlights:**

The Egyptian population is young and growing. As such, demand for food products is high and expected to rise in the coming years. Egypt recently implemented a series economic policy reforms, which are expected to stimulate economic growth and eventually lead to increased purchasing power. Supermarket chains have opened hundreds of new outlets over the past few years, hoping to capitalize on growing demand. In spite of the growth of supermarkets, the Egyptian retail food sector continues to be dominated by traditional markets. US products face stiff competition from European suppliers and from processors in the Gulf region including Saudi Arabia and the UAE; however, opportunities exist for US companies.

**Post:**

Cairo

**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 assured. The country faced an economic slowdown following the 2008 and 2011 regime changes, and subsequent decrease in tourism revenues. However, economic reforms put in place in late 2016 are beginning to yield positive results and become more apparent in the course of 2017. Analysts expect improving economic growth and increasing purchasing power in the coming years, and increased disposable incomes should translate into more demand for imported food products.

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 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.; a situation that will not change very rapidly.

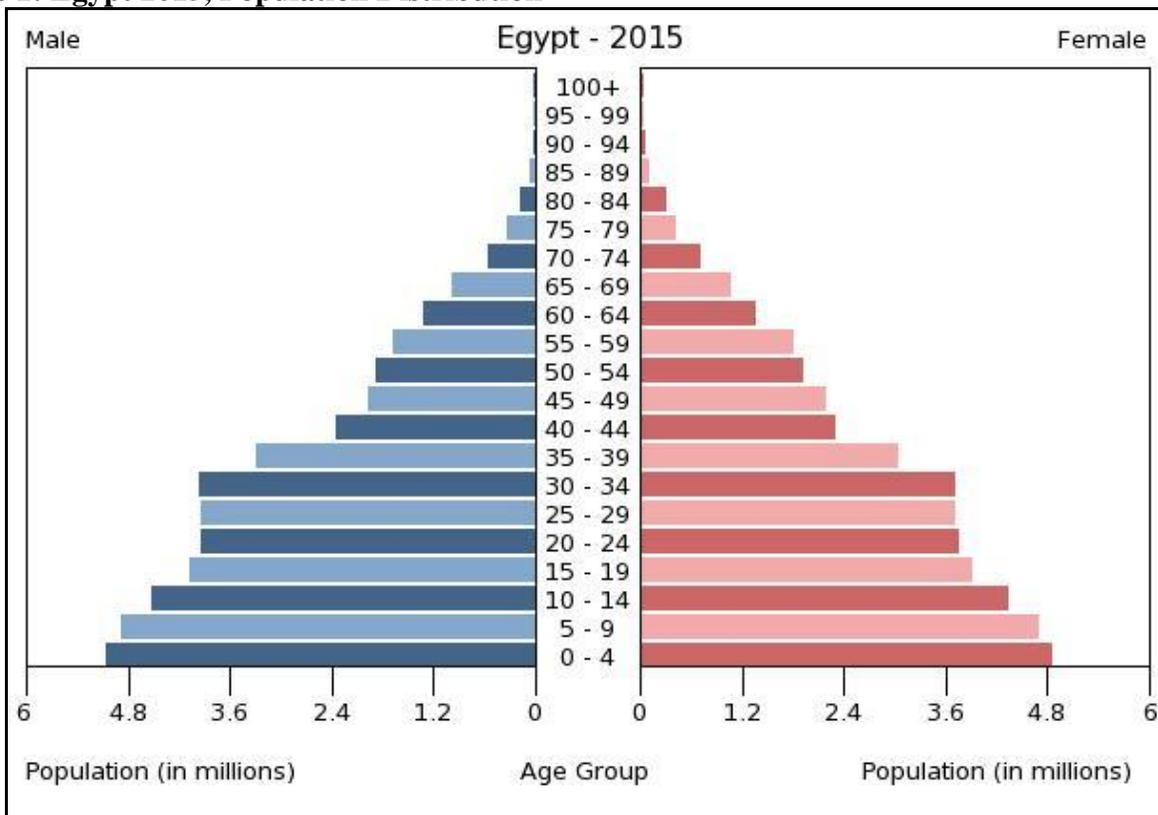
US products continue to face stiff competition from European and Gulf suppliers, both of which have duty free access to the Egyptian market. For now, US tree nuts, beef liver, and cheeses still represent the best growth prospects in Egypt.

## 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 92 million (December 2016), 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 2015, Population Distribution**



CIA World Factbook

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 (wheat, sugar, oils), as well as an important vendor of subsidized food products.

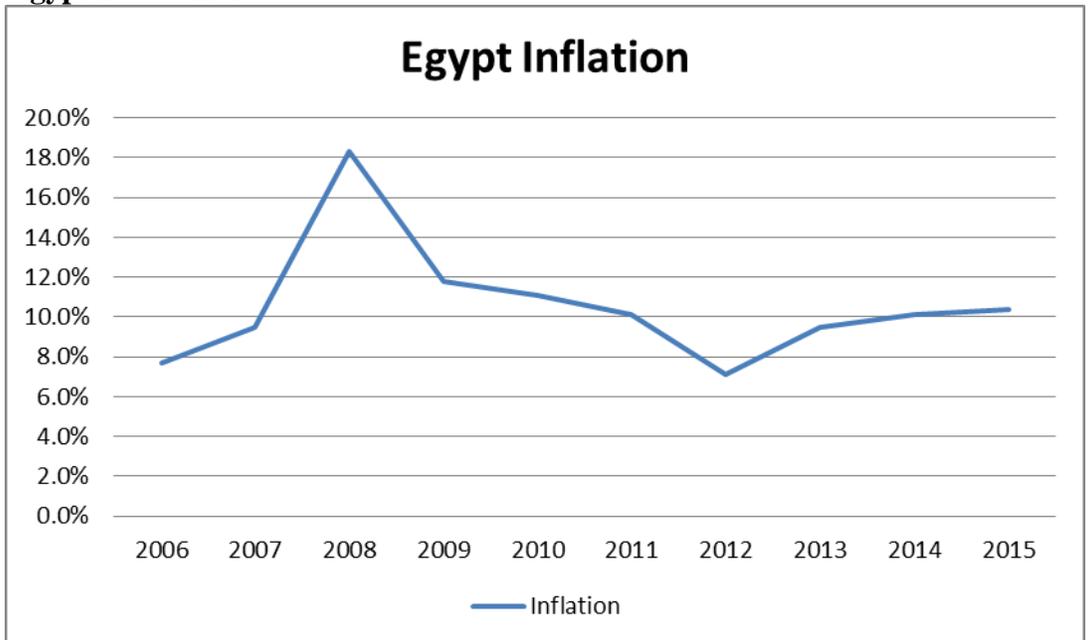
Following the 2011 revolution and subsequent political instability, there was a marked slowing of economic growth, much of which can be attributed to a decrease in tourism-related revenues. Since 2011, the country has been grappling with significant current account deficits, financed through foreign 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.

In November 2016, the Egyptian Central Bank allowed the Egyptian Pound (LE) to float freely leading to a dramatic devaluation. The value of the currency slid from 8.88LE to 18.00LE per 1 USD, a decrease of 103 percent. Immediately following the devaluation, the government of Egypt negotiated an Extended Fund Facility agreement with the International Monetary Fund. These measures in conjunction with 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 24.3 percent for 2016. This is in contrast to the inflation rate of 10.4 percent reported in 2015.

Per capita GDP in 2016 was US \$3,614 in current dollars. Official unemployment rates stood at 13.0 percent in 2014, the latest year for which public data was available.

**Figure 2: Egyptian Inflation**



CAPMAS, June 2016

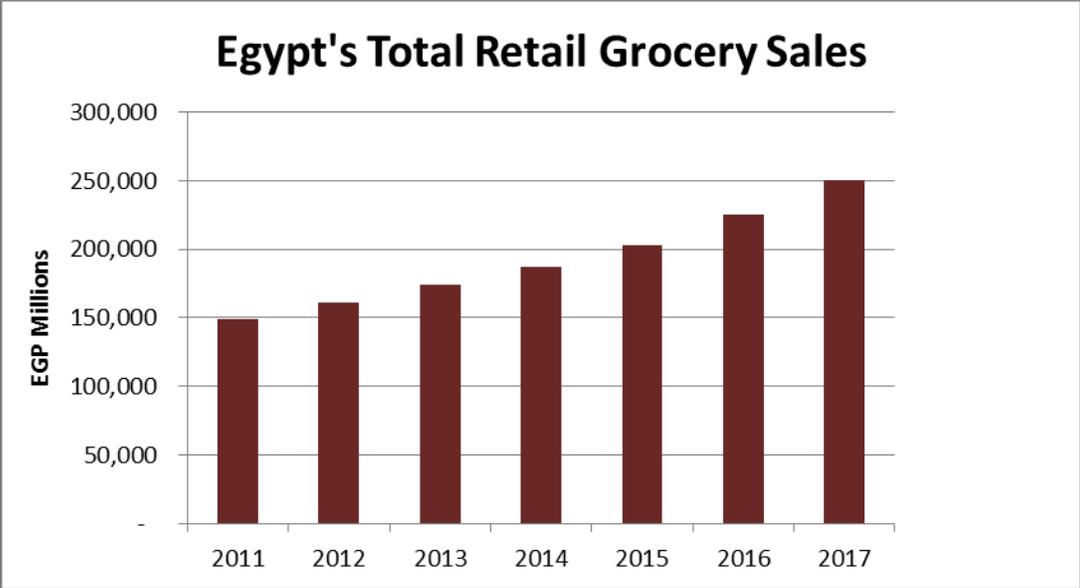
**Market Overview**

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, however, inflationary pressures may limit its growth. In spite of the immediate inflationary pressures, overall purchasing power is expected to increase, and with it, more Egyptians will be able to purchase imported food products. According to the Economist Intelligence Unit, food, beverage and tobacco sales in 2016 were estimated at US \$92 billion, or approximately US \$999 per capita. That number is expected to rise to US \$114 billion by 2020. Total retail food sales made up US \$70 billion of that total in 2015, but are expected to rise to US \$98 billion by 2020.

In terms of retail food sales from local grocers or markets, supermarkets, and convenience stores, the 2016 total value of retail food sales stood at close to 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. Figure 3 explains total retail food sales, including 2017 forecasts.

**Figure 3: Total Retail Grocery Sales**

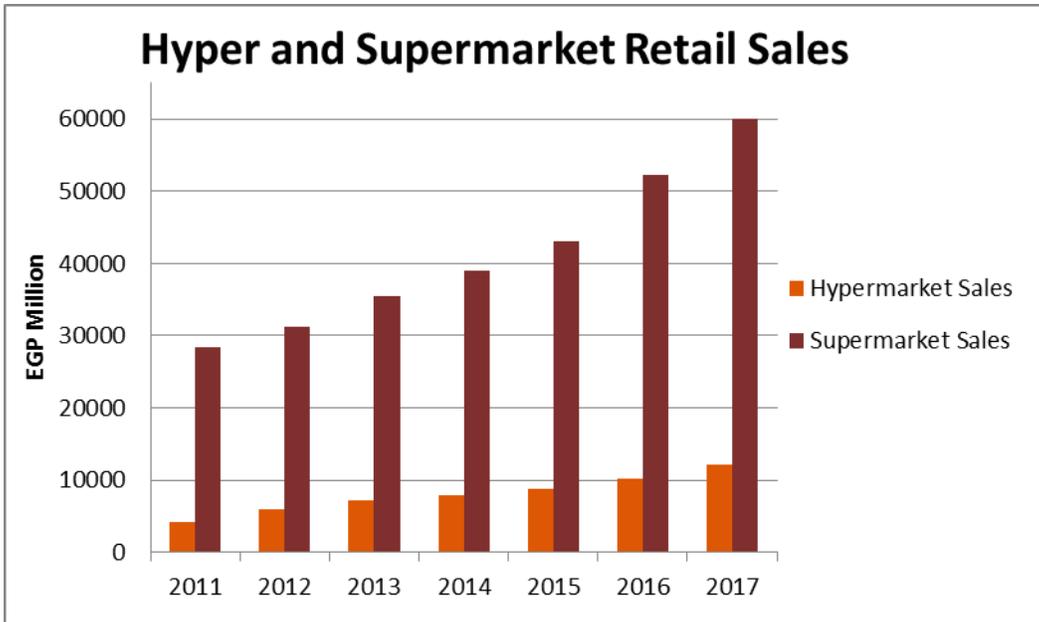


FAS analysis based on Euromonitor data (2017 est)

**Supermarkets/hypermarkets**

By the end of 2017, food sales at supermarkets and hypermarkets are expected to have doubled from their 2011 level. 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 23 percent of sales in 2016. The hypermarket segment remains small with only 35 outlets operating in the country in 2016. Those outlets account for 4.5 percent of total retail sales. Sales in modern supermarket and hypermarket chains are expected to continue to grow. Figure 4 compares hypermarket and supermarket sales, including 2017 forecasts.

**Figure 4: Egypt Hyper and Supermarket Retail Sales**

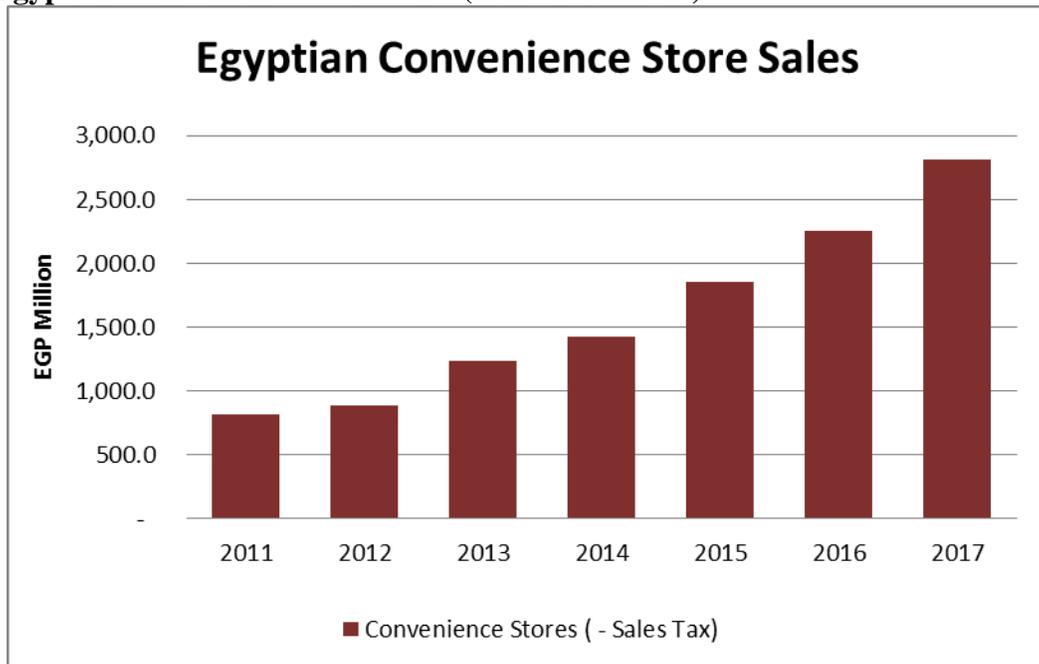


FAS Analysis based on Euromonitor data

### 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 5 illustrates growth in convenience store sales.

**Figure 5: Egyptian Convenience Store Sales (in EGP Millions)**



FAS analysis based on Euromonitor data

### 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 116,092 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 an inability to compete with larger retailers who can take advantage of economies of scale.

### Market Outlook

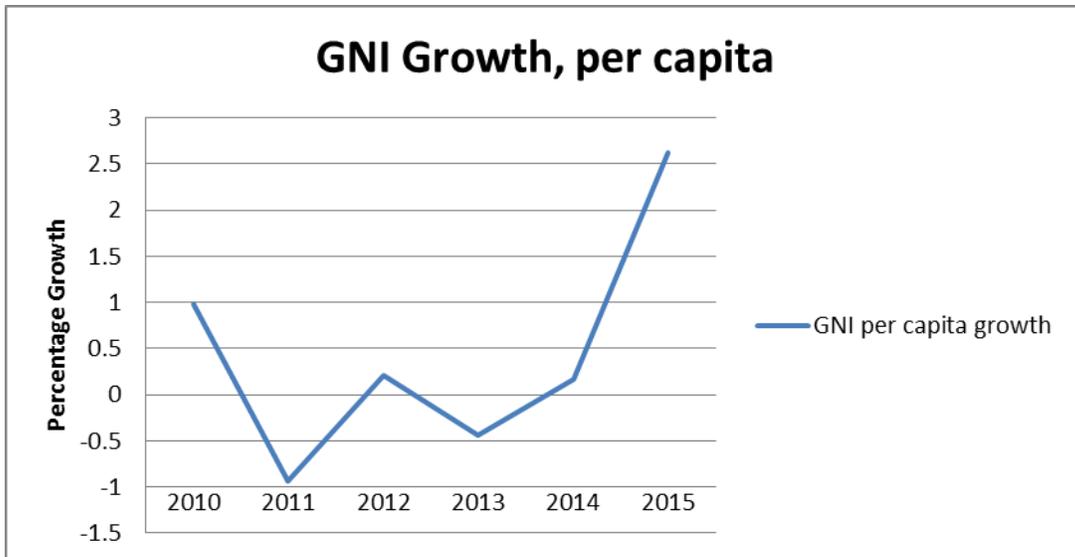
Private sector estimates put grocery retailer growth rates at nine percent, and growth in the number of outlets at one percent. The highest growth rates are among modern retail channels (convenience stores, supermarkets, and hypermarkets). Traditional grocers and wet markets continue to grow, but at slower rates. 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: Number of Outlets by Category**

	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

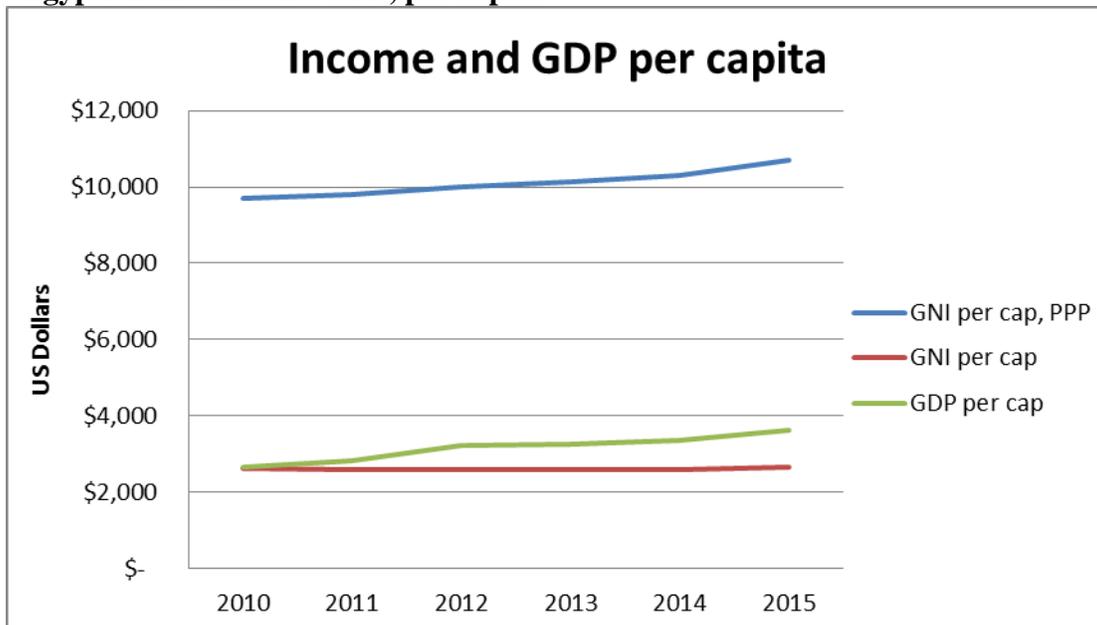
Egyptian retail sector growth can be attributed to a young growing population and gradually increasing purchasing power. The political unrest in 2011 and 2013 negatively affected incomes and subsequent purchasing power. Income growth rates have been recovering in recent years, reaching 2.6 percent in 2015, their highest rate since 2008. While the increases in income levels are minimal in real terms, purchasing power increases are more conspicuous and clearly allow for continued consumption growth. Concomitantly, GDP levels show moderate but steady increases over the last decade.

**Figure 6: Egyptian Gross National Income (GNI) Growth, per capita**



FAS Analysis based on World Bank data

**Figure 7: Egyptian Income and GDP, per capita**



FAS Analysis based on World Bank data

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/Challenges**

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

### Entry Strategy

Firms interested in exporting to the Egyptian market 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.

- 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 US. Many importers or distributors may prefer to communicate via telephone calls or in-person visits, rather than email.
- US 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. More information on product registration can be found in the following [FAS GAIN Report](#).
- 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, and Egypt itself has among the largest national presences at the 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 US firms to interact with Egyptian and regional partners.

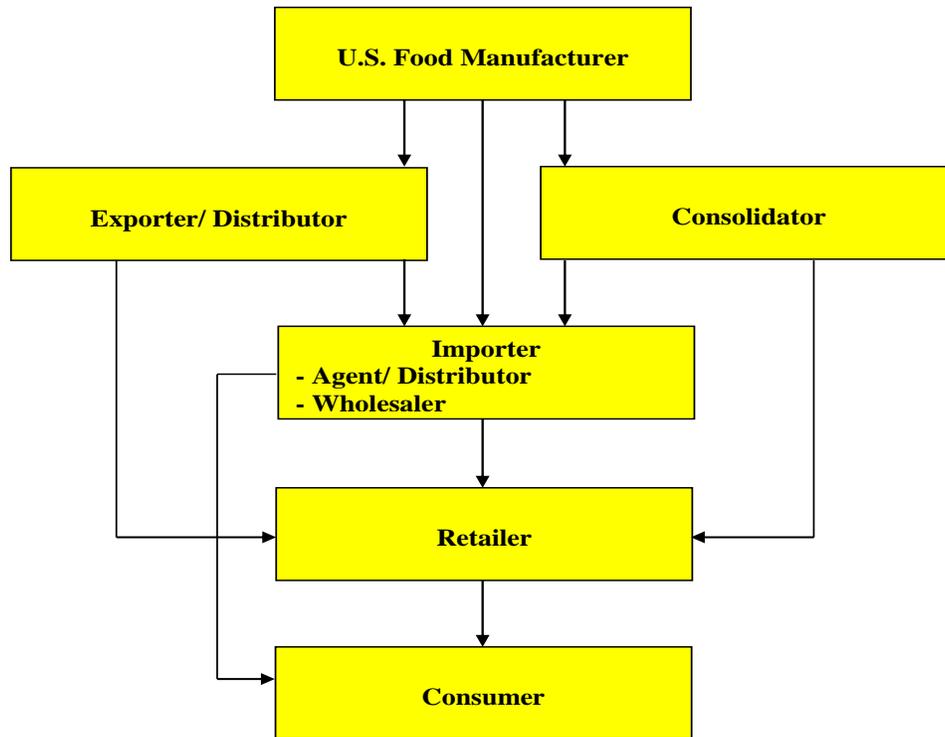
Specific retail products exported to Egypt do require registration prior to shipment. The registration requirements are not particularly onerous for producers of food and agricultural products, and US firms are typically able to register with minimal delays. Exporters should work closely with their Egyptian 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.

A final consideration when pursuing business in Egypt concerns payment considerations and the restrictions on banking transactions. Though the situation is improving, access to foreign exchange had been constricted the past few years and became particularly challenging in 2016. Under prevailing rules, import transactions may only be executed using an irrevocable letter of credit. Egyptian regulations do not currently permit any other payment arrangements. Additionally, the transfer of documents regarding the transaction must also be controlled entirely by banks handling the transaction. US exporters are urged to work closely with their banks to ensure that correct procedures are followed.

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 Export Import Bank of the United States provides exporter insurance and USDA's Export Credit Guarantee Program (GSM-102) is used to facilitate agricultural exports to Egypt.

## **Market Structure**

### **Figure 8: 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 (halal) 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, they still represent only one percent of total grocery outlets, being massively outnumbered by traditional markets. Modern hypermarkets and supermarkets combined make up 27.6 percent of all retail grocery sales. Table 3 lists the largest Egyptian supermarket or hypermarkets by 2016 sales volumes.

**Table 3: Supermarket/Hypermarket Profiles**

<b>Retailer Name and Outlet Type</b>	<b>Ownership</b>	<b>Sales (2016)</b>	<b>No. of Outlets</b>	<b>Locations</b>	<b>Purchasing Agent Type</b>
BIM	BIM LLC	LE 11,522 mn	220	National	
Kazyon	Tawfeer for Food Products	LE 8,8371 mn	168	National	
Carrefour	Majid Al Futtaim	LE 4,920 mn	29	Cairo Alexandria	Direct Importer
Ragab Sons	Ragab Sons for Trade	LE 2,956 mn	54	National	Direct Importer
Metro Fresh Foods Kheir Zaman	Mansour Manufacturing and Dist.	LE 2,697 mn	66	National	Direct Distributor
Spinneys	Spinneys Egypt Ltd	LE 1,551 mn	4	Cairo	Direct
El Nil Al Masria Al Ahram	Holding Co. for Food Industries	LE 986 mn	352	National	Gov't
Fathallah Gomla	Fathallah Gomla Market	LE 701 mn	24	Cairo Alexandria Hurghada	Direct Importer Wholesaler
Seoudi Market	Seoudi Co	LE 482 mn	11	Cairo	
Alfa Market	Alfa Market SAE	LE 462 mn	6	Cairo	Direct Importer

FAS analysis using Euromonitor and self-reported company data

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 168 branches throughout the country. Similarly, BIM first opened in 2014 with 46 new stores. As of the

close of 2016, BIM claims 220 branches throughout Egypt. 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 Le 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.

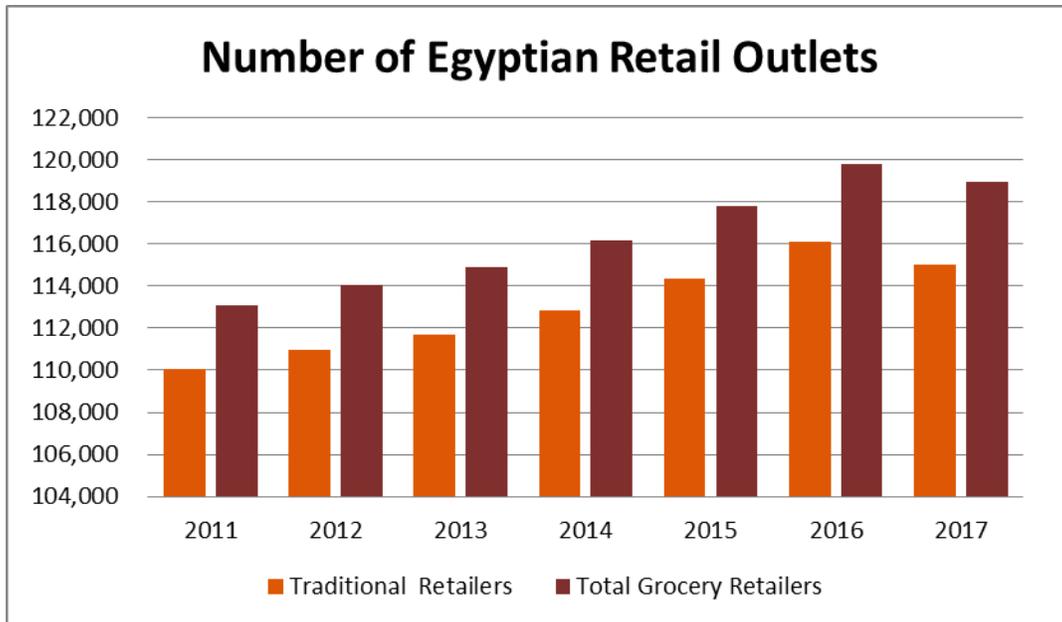
**Table 4: Convenience Store Profiles**

<b>Retailer Name and Outlet Type</b>	<b>Ownership</b>	<b>Sales (2016)</b>	<b>No. of Outlets</b>	<b>Locations</b>
Mobil Market Esso Snack and Shop On the Run	ExxonMobil Corp.	LE 672.4 mn	138	National
La Poire	La Poire	LE 96.3 mn	25	National
Emarat Misr	Emirates General Petroleum Co	LE 65.7 mn	6	Cairo Alexandria
Total	Total SA	LE 56.5 mn	10	
7 Mart	7 Mart	LE 46 mn	4	Cairo

### *Traditional Market Overview*

As mentioned throughout, Egyptian traditional markets dominate retail food sales in Egypt. These firms include small mom-and-pop grocers, butchers, bakers, etc. Growth rates of traditional markets are decelerating as compared to modern outlets; however, both remain positive. Figure 9 contrasts the overall number of food retailers with the number of traditional markets. 2017 forecasts are for a decline in the total number of retail outlets, which is likely explained as market adjustment following the 2016 macroeconomic policy shifts and the creeping share in food sales of larger retail establishments over time.

**Figure 9: Egyptian Retail Outlet Numbers (Store Outlets Only)**



FAS analysis based on Euromonitor data

### 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 meat meets approximately 60 percent while about 40 percent of consumption is met through imports. Despite growing fluid milk output, Egypt still imports close to \$1 billion/year in dairy products. Domestic egg production covers almost all demand. In the case of poultry, domestic production meets about 90 percent of demand with the balance imported; however, US poultry parts remains unjustifiably blocked from the market. Egypt's per capita consumption of chicken at about 11 kg./capita is low.

Egypt has trade agreements with the EU, the Arab League (GAFTA), COMESA and Turkey, allowing these partners preferential treatment to the Egyptian market. As such, many US products face a competitive disadvantage to comparable products produced by suppliers from these countries. The US remains the most competitive in tree nuts and some beef products, most notably liver.

Exports of a number of US products decreased noticeably in recent years. These decreases are tied to a strong US dollar, Egyptian capital controls throughout much of 2016, and stiff competition from the EU and others. In 2015, exports of dairy products, excluding cheese, decreased by 65.6 percent, US 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.

<b>Product Category</b>	<b>Major Supply Sources</b>	<b>Strengths of Key Supply Countries</b>	<b>Advantages and Disadvantages of Local Suppliers</b>
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**Table 5: Egypt – Major Imports and Competing Suppliers**

<b>Snack Foods</b> Imports: 34,664 MT \$64.6 Million	1. Turkey – 17.9% 2. UAE – 16.3% 3. Saudi Arabia – 11.5% 13. USA – 1.6%	Duty free access Proximity	Lower quality More price competitive
<b>Breakfast Cereals</b> Imports: 3,321 MT \$5.2 Million	1. France – 19% 2. Spain – 17.8% 3. China – 8.5% 7. USA – 5.8%	EU duty free access	Imports perceived to be better quality
<b>Beef and Offal</b> Imports: 215,311 MT \$1,693 Million	1. Brazil – 61.9% 2. India – 19.9% 3. USA – 14.16%	Low cost of production (India/Brazil)	Limited domestic stock
<b>Dairy (excl. cheese)</b> Imports: 208,889 MT \$595.7 Million	1. New Zealand – 44.5% 2. France – 11.7% 3. Germany – 8.3% 4. USA – 5.9%	Low cost of production (NZ) EU duty free access	Limited domestic production
<b>Cheese</b> Imports: 32,260 MT \$145.3 Million	1. Netherlands – 32.8% 2. New Zealand – 25% 3. Poland – 11.5% 9. USA – 1.8%	Low cost of production (NZ) EU duty free access	Domestic production does not meet demand
<b>Fresh Apples</b> Imports: 18,963 MT \$440.8 Million	1. Italy – 44.1% 2. Greece – 18.1% 3. Syria – 10.2% 16. USA 0.27%	EU duty free access Proximity	No domestic production
<b>Processed F&amp;V</b> Imports: 59,157 MT \$98.5 Million	1. Turkey – 15.9% 2. UAE – 9.1% 3. China – 7.6% 10. USA – 4%	Duty free access Low costs of production	Large domestic industry Distribution/quality issues
<b>Fish</b>	1. Thailand –	Duty free access	Large domestic tilapia

Imports: 479,006 MT  \$716.8 Million	22.2% 2. Netherlands – 18.7% 3. Vietnam – 7.5% 24. USA – 0.38%		production  Limited production of marine varieties
<b>Tree Nuts</b>  Imports: 22,863 MT  \$101.6 Million	1. USA – 26.3% 2. Vietnam – 20.7% 3. Turkey – 16.5%	Three major importers supply different products	Limited domestic production
<b>Beverages (non-alcoholic)</b>  Imports: 17,732,532 L  \$17.9 Million	1. Saudi Arabia – 28.3% 2. Austria – 24% 3. UAE – 16.4% 7. USA – 2.5%	Duty free access (Arab Union)	Limited domestic production
<b>Pet Food</b>  Imports: 5,040 MT  \$6.96 Million	1. France – 25.7% 2. Germany – 23.5% 3. USA – 9.6%	EU duty free access	Limited local production

2015 Values – data from GTIS

#### SECTION IV: BEST PROSPECTS

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

**Table 6: US Best Prospects - Products With Continued Sales Potential**

	CY 2015 Value	CY 2015 Quantity (MT)	Growth by Value	Average Applied Import Duty	Key Constraints
Walnuts	\$7,813,739	20,185	64.6%	10%	

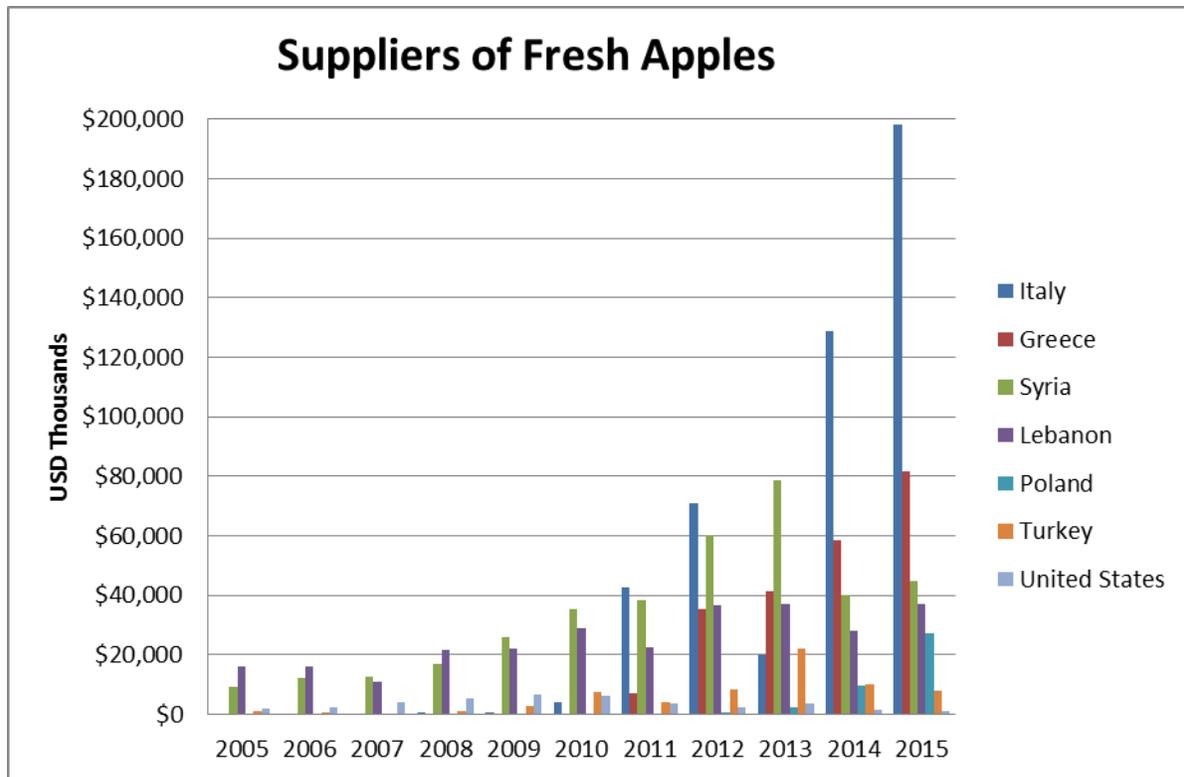
Almonds	\$13,827,887	255	-12.2 %	10%	
Pistachios	\$2,791,420	25	3.7%	10%	Competition from Iran and Syria.
Processed Dairy	\$35,083,714	11,525	-65.6%	16.7% - Concentrated  0-6% - In solid forms (varies by fat content)  0-1.8% - Whey	Competition from New Zealand.
Cheese	\$2,586,352	541	-90.4%	10% - Fresh, Grated, Powdered, Processed Cheese  2.5% - Aged Cheeses	Competition from EU, New Zealand. access for EU.
Beef/Offal	\$153,833,552	104,653	-2.0%	0%	Relatively high price compared to competitors on muscle cuts.

2015 Values – data from GTIS

### Products with Declining Market Share

Traditionally, Egypt imported apples from regional markets, primarily Syria and Lebanon. Egyptian importers also brought in higher-value apples from the US, making the US the third largest supplier and controlling around 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, while US apples continued to face duties of 20-35 percent. As such, shipments of apples from the EU, namely Italy and Greece, have flooded the market and decimated US sales. In 2016 the tariff on apples was raised to forty percent. If duties were dropped on US-sourced product, US suppliers would likely regain market share.

### Figure 10: Suppliers of Fresh Apples to Egypt



Data from UN Comtrade

In a similar trend to apples, US exports of snack foods are quickly losing market share to their European competition. The US 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 UK, Italy, Belgium, and Spain. Tariff rates on US-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 US were first blocked from the Egyptian market in the early 1990s. The policy shifted in 2006, allowing the import of 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 US chicken parts, including Halal concerns, avian influenza, and mixing or contamination of meat with other avian species. In reality, the domestic chicken industry is well connected and typically opposes any measures that would allow for low cost imports.

Egypt imports whole chicken from Brazil, Ukraine and India. Brazil is the largest exporter of whole chicken to Egypt, shipping US \$115 million in product in 2016. Whole birds from the US are not price-competitive in Egypt. Additionally, the larger size of US birds makes them less attractive to Egyptian consumers, who are accustomed to chickens weighing 900-1200 g.

## **SECTION V: POST CONTACT AND FURTHER INFORMATION**

The reports produced by the Office of Agricultural Affairs in Cairo, Egypt may be of interest to US exporters considering business in the region. Those reports are publically available online through USDA's Global Agricultural Information Network [website](#).

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