

EXPLORING THE GLOBAL DEMAND FOR **FROZEN PREPARED POTATOES** AND EGYPT'S EXPORT POTENTIAL

_____ HS Code: 200410 _____

Sep 2024



Agenda

Product Overview

Introduction

Global Imports and Trend Analysis

- Top Importing Markets Globally
- Top Exporting Markets Globally

Overview of Egypt's Export

Recommended Markets

- Saudi Arabia Market
- Italy Market

Conclusion

References



Product Overview

Product name: Potatoes prepared or preserved otherwise than by vinegar or acetic acid, frozen.

HS Code: 200410

This HS code encompasses a variety of potato preparations that have been preserved or prepared through methods other than using vinegar or acetic acid and are then frozen to maintain freshness and extend shelf life. These methods of preparation may include blanching, boiling, frying, or other cooking techniques, as well as the addition of seasonings or coatings.



Introduction

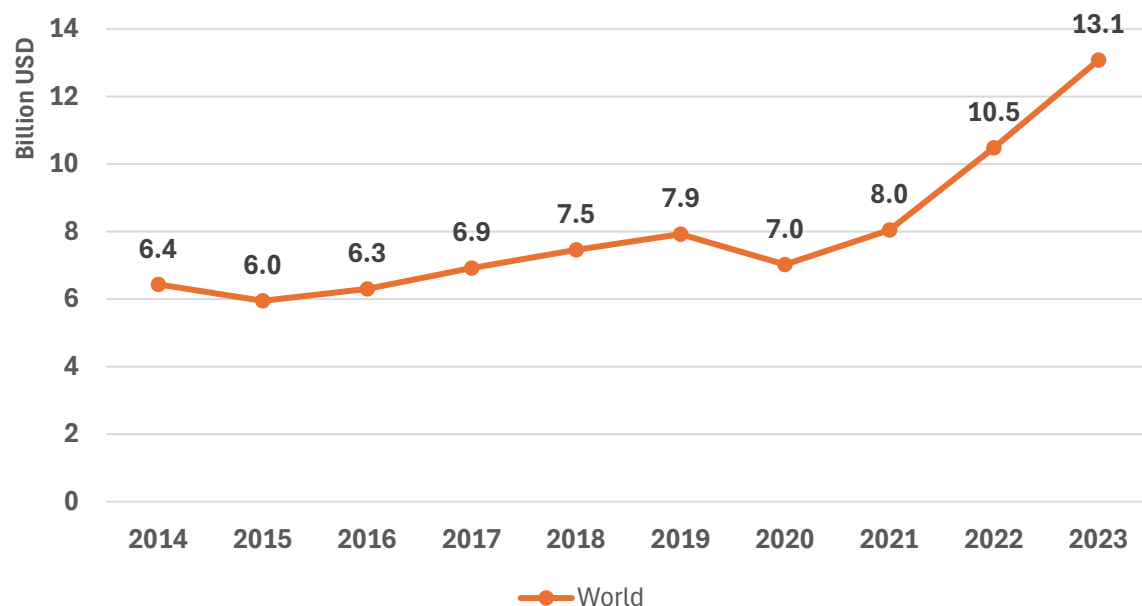
The global frozen potato market, categorized under HS code 200410, achieved a significant export value of \$13 billion in 2023. This growth reflects an increasing global demand for convenient, ready-to-cook food products, driven by changing consumer lifestyles and the rapid expansion of the fast-food industry. Another related category, uncooked or steamed/boiled frozen potatoes (HS code 071010), also demonstrated notable performance, with global exports reaching \$214 million in value.

Egypt has emerged as a competitive player in the frozen potato market. In 2023, Egypt's exports under HS code 200410 amounted to \$134 million, with a total volume of 109 thousand tons, showcasing the country's potential in this growing sector. Additionally, exports under HS code 071010 reached \$22 million, with a volume of 20 thousand tons, further solidifying Egypt's role in the global frozen potato supply chain.

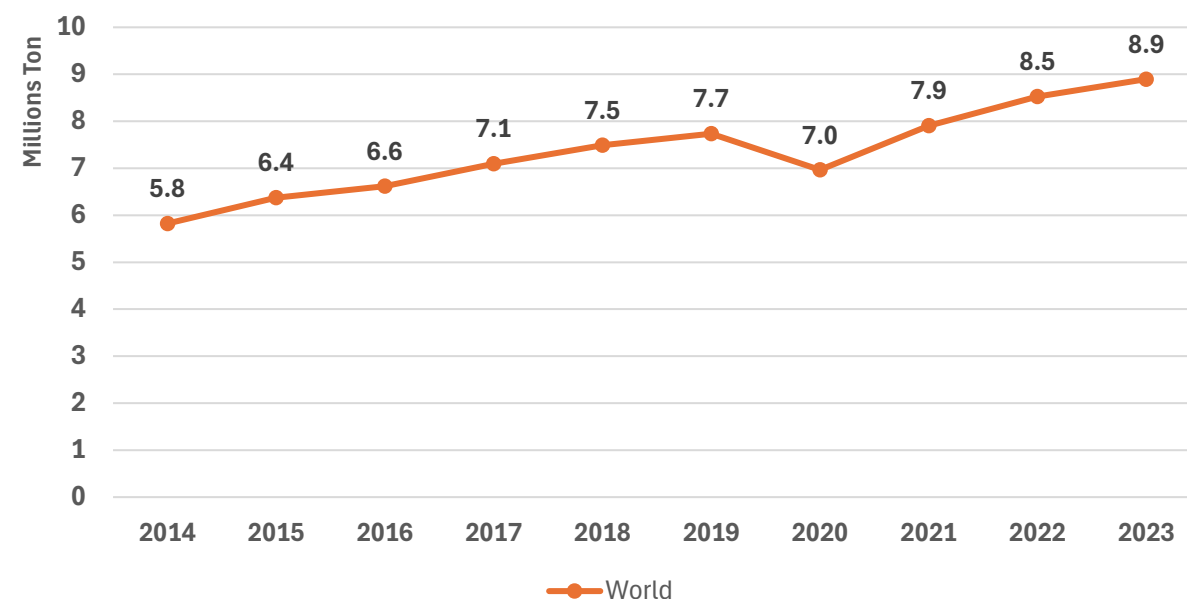
Does Egypt have growth opportunities in the frozen potatoes sector (HS Code: 200410)? Which countries offer the greatest potential for expanding Egypt's exports in this product category?

Global Imports and Trend Analysis in 2023

Global Import Values from 2014 to 2023 (in Billion USD)



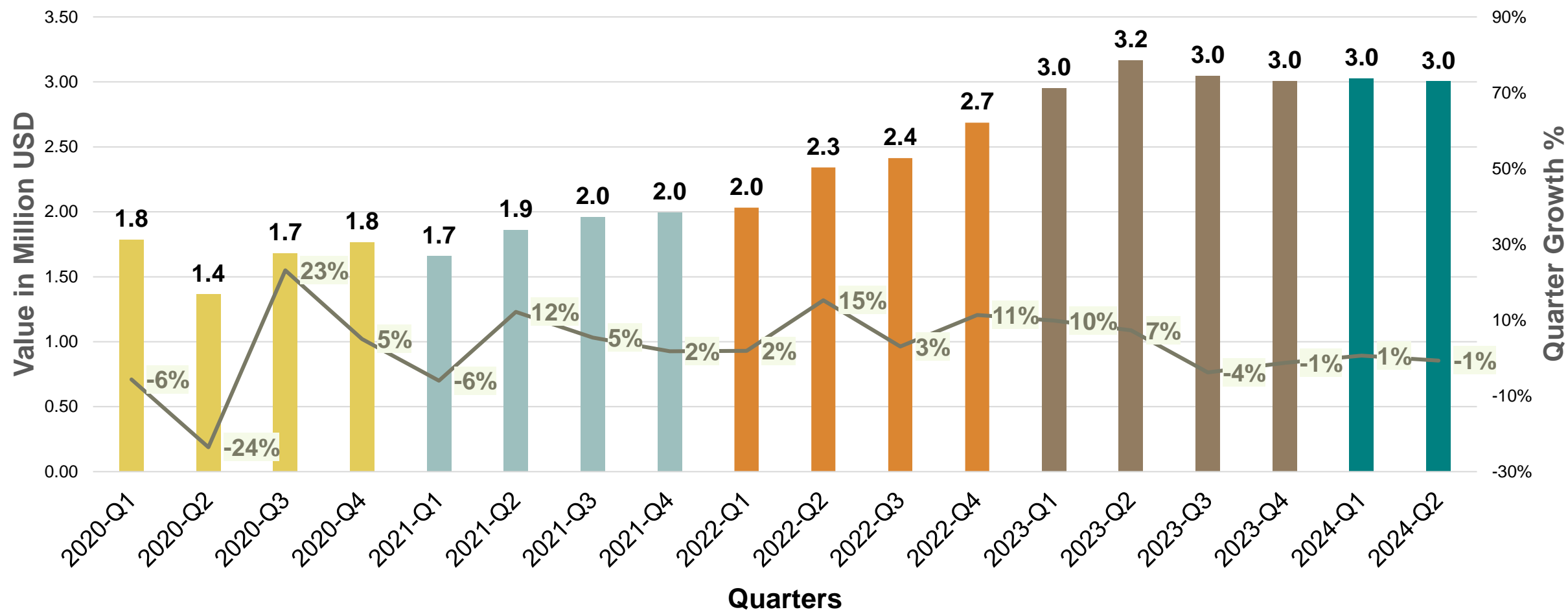
Global Import Quantities from 2014 to 2023 (in Million ton)



In the examination of global imports and trends, the total import value for 2023 reached 13 billion USD, with a corresponding quantity of 8.9 million tons. Between 2019 and 2023, import values experienced an annual growth rate of 15%, while import quantities showed an annual growth of 5%, and increase in value between (2022 -2023) with 26%, suggesting an upward trajectory in prices throughout this timeframe..

Analysis of Global Import Value from Q1 2020 to Q2 2024

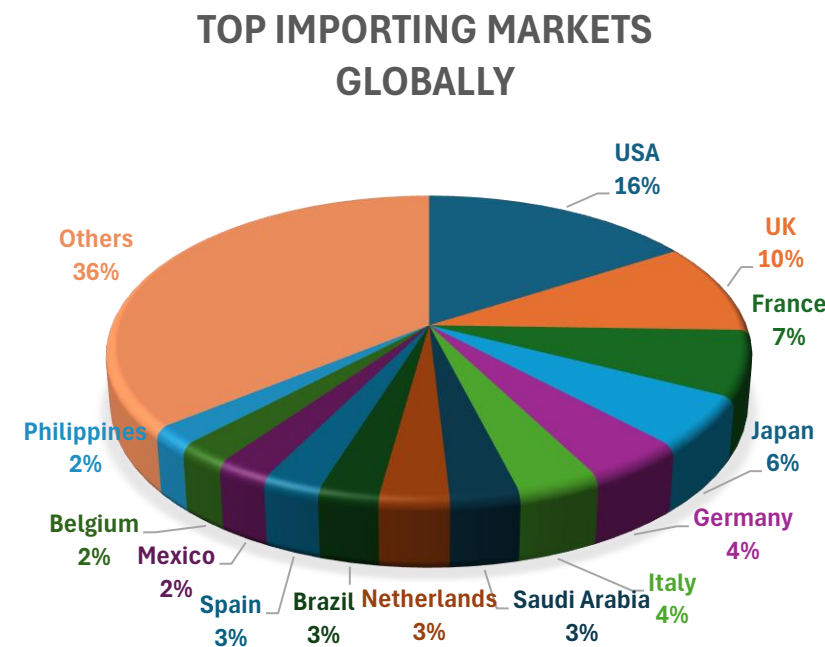
Analysis of Global Import Value from Q1 2020 to Q2 2024



Source: ITC (Trade Map)

Top Importing Markets Globally in 2023

Rank	Country	Import Value in Million USD	Import Quantity in Thousand Ton	Share in Global Imports	Annual Growth (Value, 2019-2023)	Annual Growth (Quantity, 2019-2023)	Annual Growth (Value, 2022-2023)	Unit value (USD/unit)
1.	USA	2,098	1,459	16%	21%	11%	25%	1,438
2.	UK	1,257	827	10%	19%	7%	31%	1,521
3.	France	918	644	7%	12%	2%	44%	1,426
4.	Japan	722	388	6%	13%	3%	11%	1,860
5.	Germany	578	390	4%	11%	4%	37%	1,483
6.	Italy	489	288	4%	16%	7%	27%	1,699



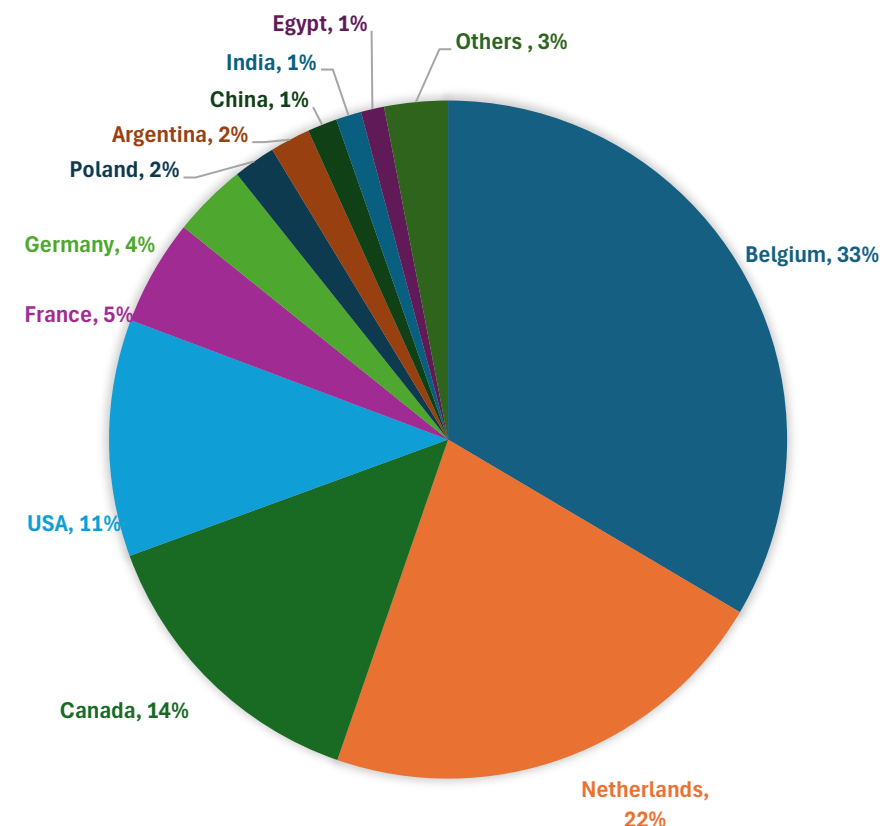
In 2023, the USA led global imports of frozen potatoes (HS code 200410) with 2 billion USD and 1.5 million tons, representing 16% of global imports. The UK followed with 1.3 billion USD and 827 thousand tons (10%). France, Japan, Germany, and Italy also showed significant import values of 918 million USD, 722 million USD, 578 million USD, and 489 million USD, respectively. Notably, France saw a 44% increase in value from 2022 to 2023. The unit values varied, with Japan's at 1,860 USD per ton, indicating diverse market preferences and demands for frozen potato products globally.

Top Exporting Markets Globally in 2023

Top Exporting Markets Globally: Export Value, Quantity, and Growth Trends in 2023

Rank	Country	Export Value in Million USD	Export Quantity in Thousand Ton	Share in Global Exports	Annual Growth in Value (2019-2023)	Annual Growth in Quantity (2019-2023)	Annual Growth in Value (2022-2023)	Unit value (USD/unit)
1.	Belgium	4,323	3,222	33%	20%	6%	42%	1,342
2.	Netherlands	2,814	1,976	22%	13%	3%	31%	1,424
3.	Canada	1,821	1,351	14%	16%	8%	14%	1,347
4.	USA	1,461	887	11%	6%	-2%	9%	1,648
5.	France	651	456	5%	14%	8%	37%	1,427
6.	Germany	459	319	4%	12%	0%	26%	1,440
7.	Poland	267	206	2%	11%	1%	40%	1,292
8.	Argentina	248	174	2%	7%	-4%	5%	1,427
9.	China	188	134	1%	79%	83%	57%	1,402
10.	India	157	116	1%	53%	46%	64%	1,357
11.	Egypt	139	99	1%	24%	12%	54%	1,409

TOP EXPORTING MARKETS GLOBALLY

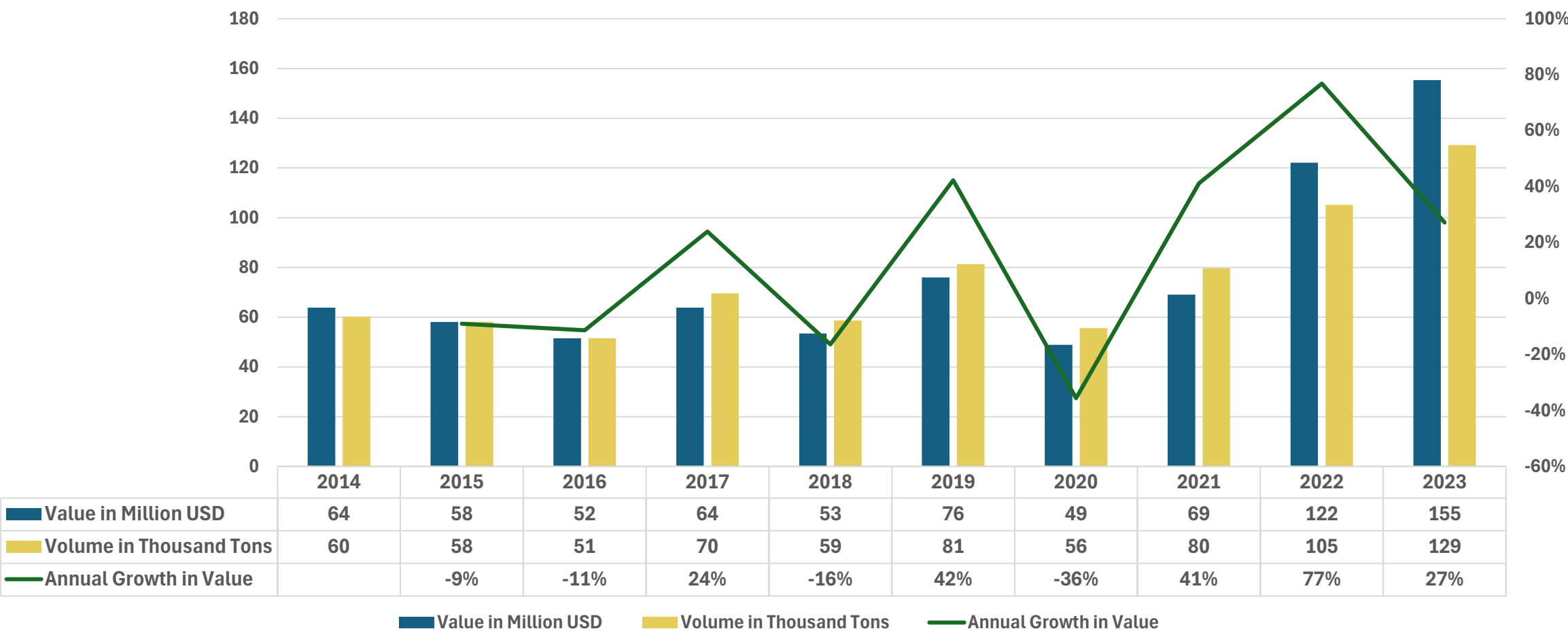


Source: ITC (Trade Map)



Egypt's Export Growth Overview: HS Codes 071010 and 200410

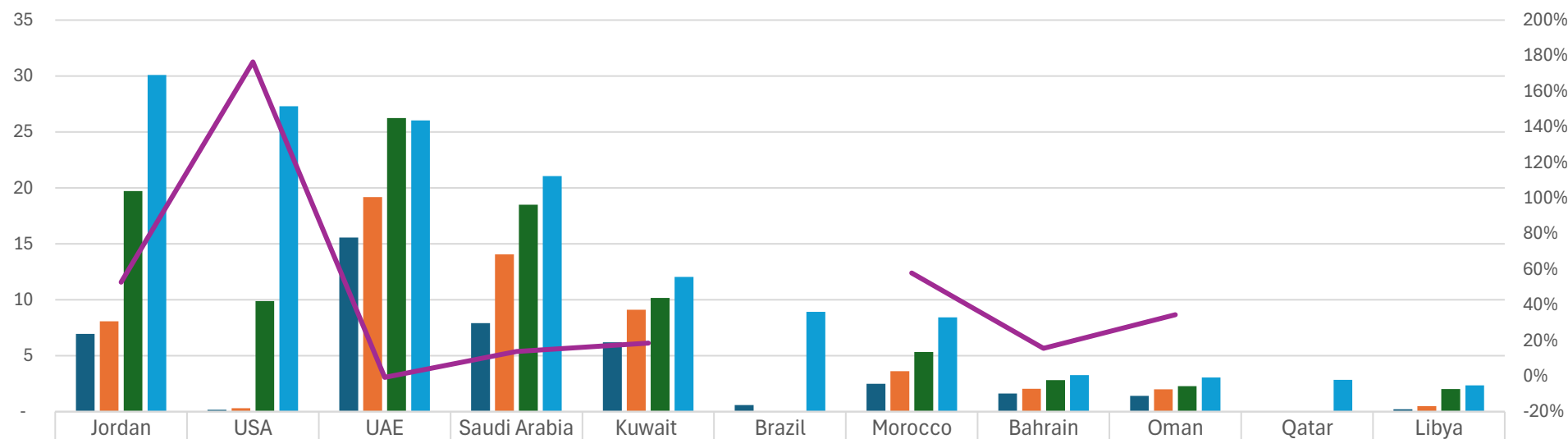
Egypt Frozen Potatoes: Volume and Value (2014-2023) (GOEIC DATA)





Egypt Frozen Potatoes: Top Export Destinations and Growth Trends in 2023 – GOEIC

Egypt Frozen Potatoes: Top Export Destinations and Growth Trends in 2023 – GOEIC



Value Exported in 2020 in Million (USD)	7	0.173	16	8	6	1	3	2	1	-	0.2
Value Exported in 2021 in Million (USD)	8	0	19	14	9	-	3.62	2	2	-	0.49
Value Exported in 2022 in Million (USD)	20	10	26	19	10	-	5.3	2.8	2.3	-	2
Value Exported in 2023 in Million (USD)	30	27	26	21	12	9	8	3	3	3	2
Annual Growth Rate between (2022-2023) %	53%	177%	-1%	14%	18%		58%	16%	35%		16%

Value Exported in 2020 in Million (USD)

Value Exported in 2021 in Million (USD)

Value Exported in 2022 in Million (USD)

Value Exported in 2023 in Million (USD)

Annual Growth Rate between (2022-2023) %



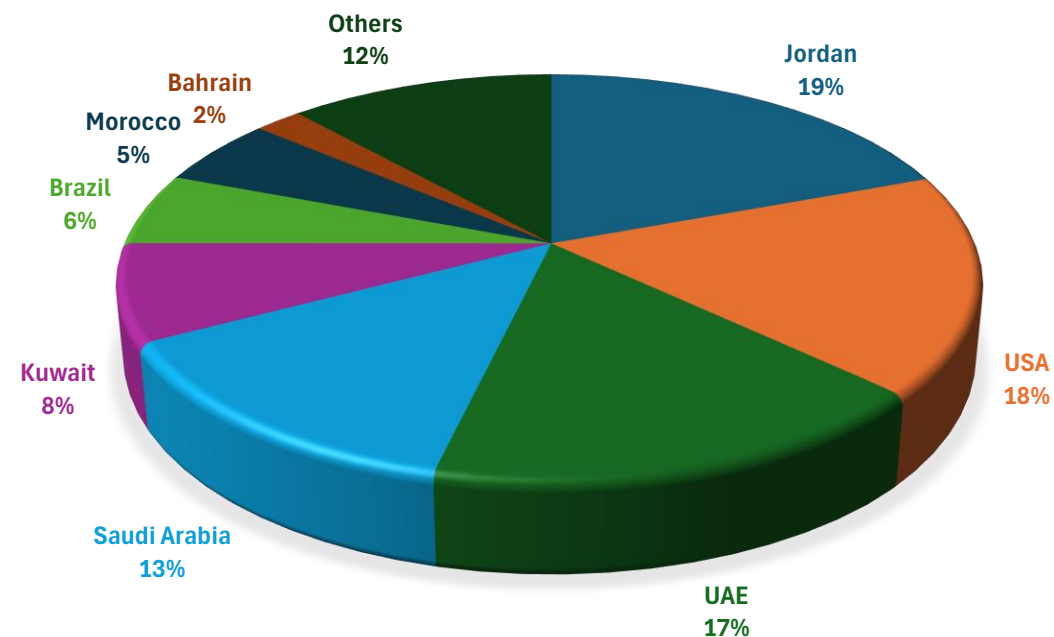
Global Export Position in 2023 (Trade Map)

- Egypt's Share in Global Exports: 1.1%
- Egypt's World Ranking for frozen potatoes: 11

Export Performance of Egypt's Frozen Potatoes with Average Unit value (USD/unit) (2023) GOEIC

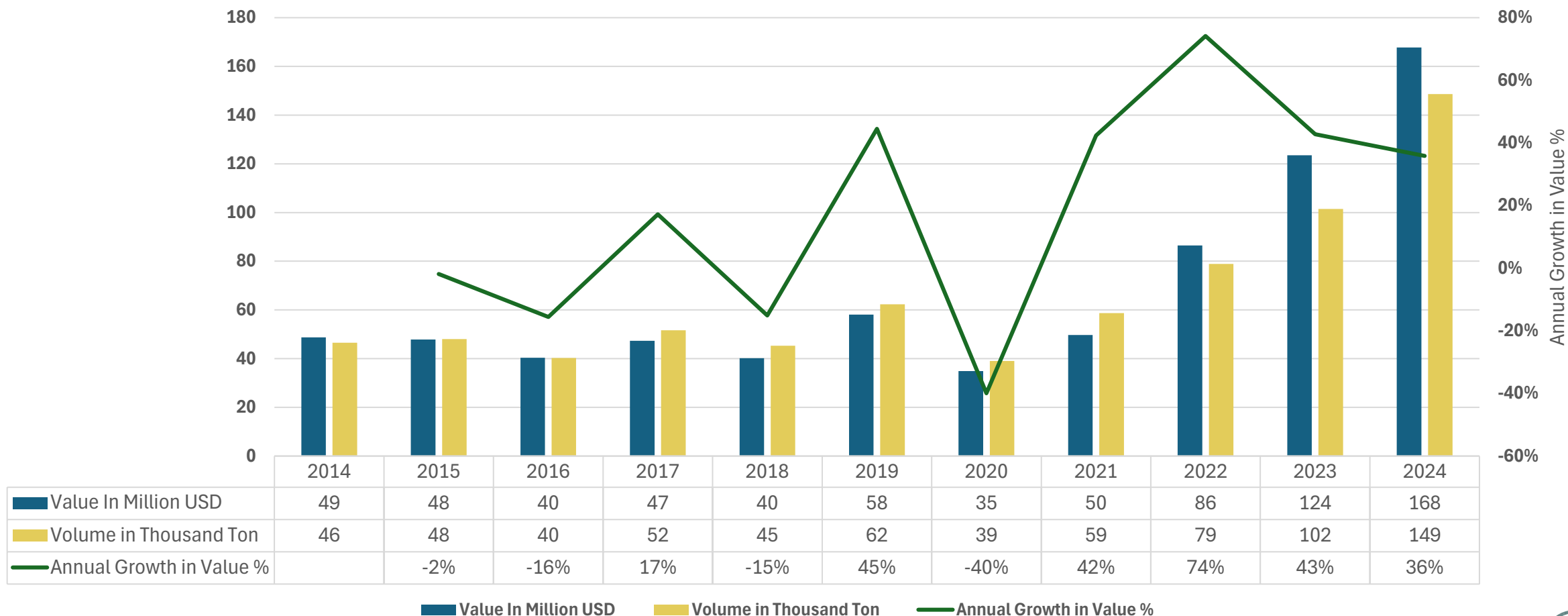
Rank	Country	Export Value (2023) in Million USD	Export Quantity in Thousand Ton	Share in Egypt's Export	Annual Growth Rate in Value between (2022-2023)	Average Unit value (USD/unit)
1.	Jordan	30	28	19%	53%	1,073
2.	USA	27	19	18%	177%	1,432
3.	UAE	26	21	17%	-1%	1,219
4.	Saudi Arabia	21	18	13%	14%	1,143
5.	Kuwait	12	10	8%	18%	1,169
6.	Brazil	9	8	6%	-	1,121
7.	Morocco	8	7	5%	58%	1,197
8.	Bahrain	3	3	2%	16%	1,315

EGYPTIAN EXPORT MARKET SHARE BY COUNTRY IN 2023 GOEIC DATA



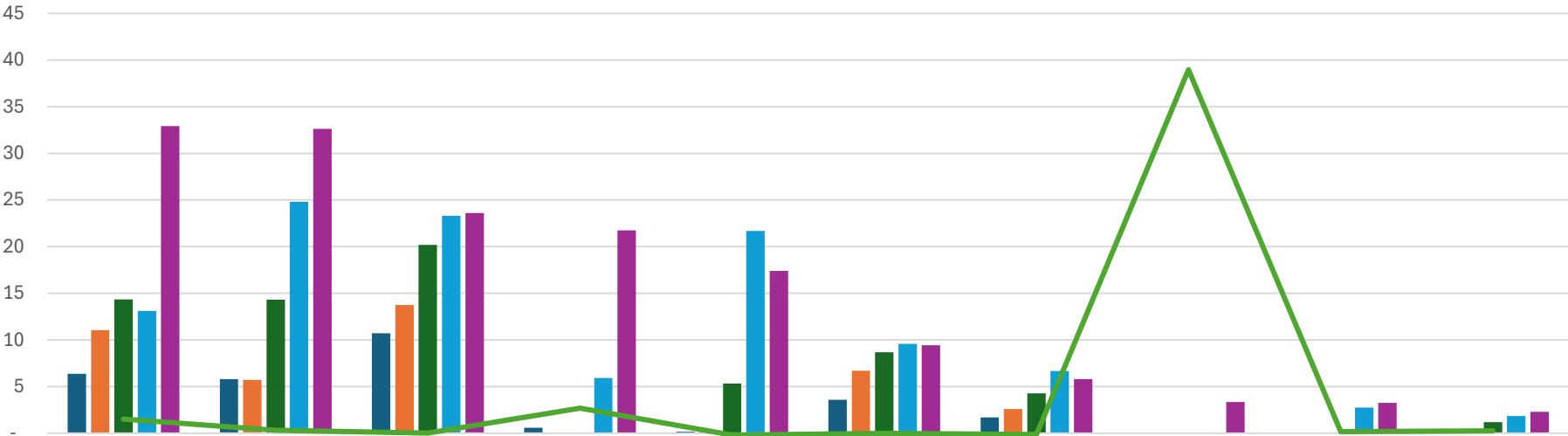
"Egypt's Exports of Frozen Potatoes During the First 9 Months of Each Year"

"Egypt's Exports of Frozen Potatoes During the First 9 Months of Each Year" from(Jan - Sep)



Egypt's Exports top destinations of frozen potatoes During the First 9 Months of Each Year" from(Jan - Sep)

Egypt's Exports top destinations of frozen potatoes During the First 9 Months of Each Year" from(Jan - Sep)



(5)

	Saudi Arabia	Jordan	UAE	Brazil	USA	Kuwait	Morocco	Poland	Qatar	Libya
Value Exported in 2020 in Million (USD)	6	6	11	1	0.17	4	2	0.04	-	0.03
Value Exported in 2021 in Million (USD)	11	6	14	-	0.17	7	3	0.033	-	0.419
Value Exported in 2022 in Million (USD)	14	14	20	-	5	9	4	0.04	-	1
Value Exported in 2023 in Million (USD)	13	25	23	6	22	10	7	0.08	3	2
Value Exported in 2024 in Million (USD)	33	33	24	22	17	9	6	3	3	2
Annual Growth Rate between (2023-2024) %	151%	32%	1%	267%	-20%	-2%	-13%	3897%	18%	25%

Value Exported in 2020 in Million (USD)

Value Exported in 2021 in Million (USD)

Value Exported in 2022 in Million (USD)

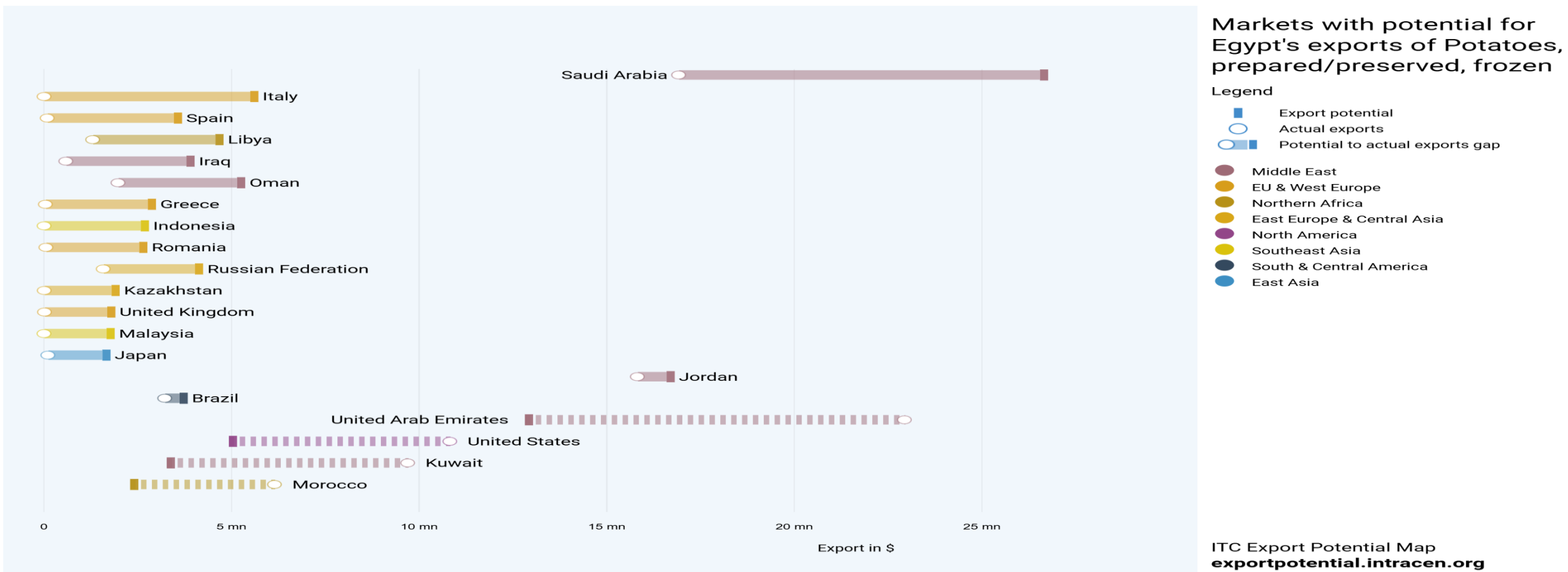
Value Exported in 2023 in Million (USD)

Value Exported in 2024 in Million (USD)

Annual Growth Rate between (2023-2024) %




Top Markets for Egypt in Terms of Export Potential



Key findings

The markets with greatest potential for Egypt's exports of 200410 Potatoes, prepared/preserved, frozen are Saudi Arabia and Italy. Saudi Arabia shows the largest absolute difference between potential and actual exports in value terms, leaving room to realize additional exports worth \$9.5 mn.

Top Markets for Egypt in Terms of Export Potential

	Country	Export Potential	Actual Export Value	Unrealized Potential Remaining	MFN Duties Applied	Preferential Tariff
	Saudi Arabia	\$26 mn	\$17 mn	\$9.5 mn	5%	0%
	Italy	\$5.4 mn	\$2 k	\$5.4 mn	14.40%	0%
	Spain	\$3.3 mn	\$86 k	\$3.2 mn	14.40%	0%
	Libya	\$4.4 mn	\$1.3 mn	\$3.1 mn	0%	N/A
	Iraq	\$3.7 mn	\$582 k	\$3.1 mn	N/A	N/A
	Oman	\$5 mn	\$2 mn	\$3 mn	5%	0%
	Greece	\$2.6 mn	\$38 k	\$2.6 mn	14.40%	0%
	Indonesia	\$2.4 mn	\$3 k	\$2.4 mn	5%	N/A
	Romania	\$2.4 mn	\$52 k	\$2.3 mn	14.40%	0%
	Russian Federation	\$3.9 mn	\$1.6 mn	\$2.3 mn	11%	8.25% GSP
	Kazakhstan	1.7 mn	\$6.7 k	1.7 mn	11%	8.25% GSP

Note: Egypt has an unrealized export potential of \$38.6 million across 11 countries.

Source: ITC (Export Potential Map, Market Access Map)



Saudi Arabia Market

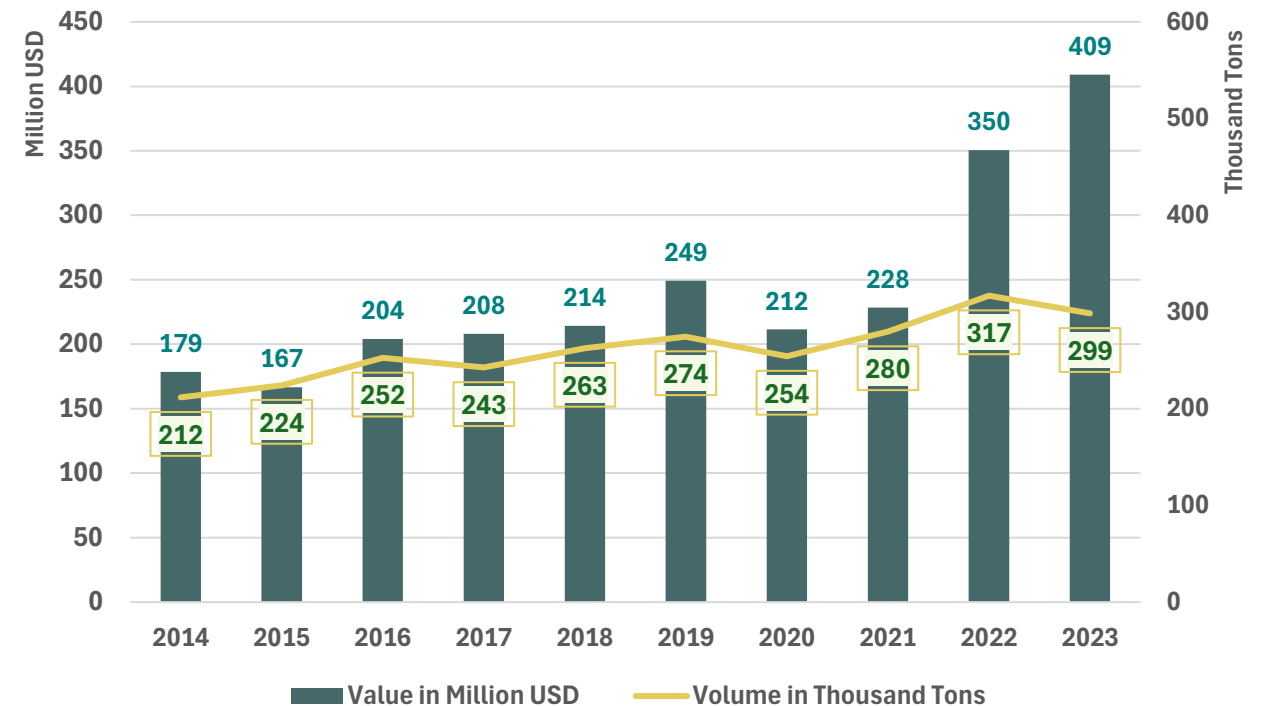
Overview of Saudi Arabia Import Performance in 2023 (Trade Map)

- Saudi Arabia's imports represent 3.1%.
- Its ranking in world imports is 7th
- Total Imports: 409 Million USD
- Import Quantity: 299 thousands tons
- Unit Value(USD/unit): 1,370

Annual Growth Analysis

- Annual Growth Value (2019-2023): 16%
- Annual Growth Quantity (2019-2023): 4%
- Annual Growth Value (2022-2023): 19%

Saudi Arabia Frozen potatoes: Volume and Value Trends (2014-2023)

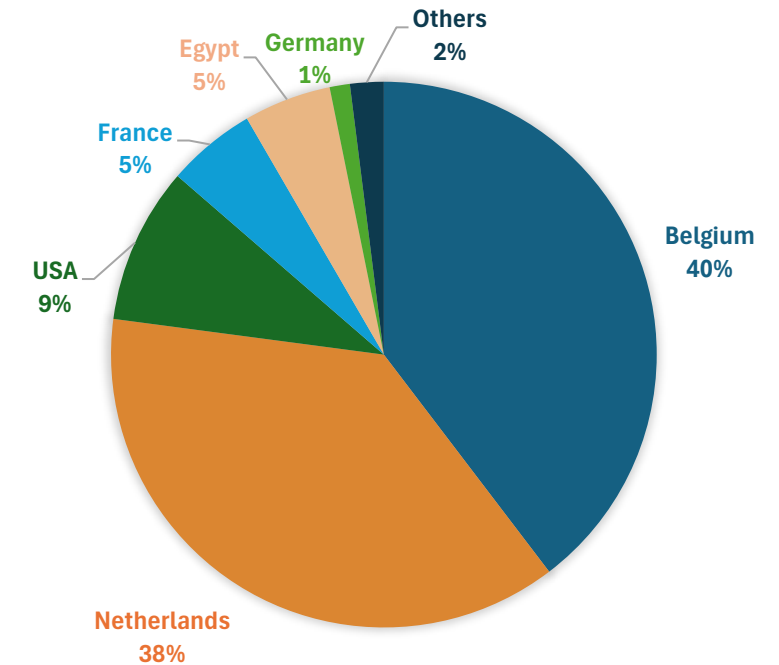


Top Exporters to Saudi Arabia

Top Exporters to Saudi Arabia by Share in Imports: Import Value, Volume in 2023

Exporters	Imported Value in Million USD	Imported Volume in Thousands Ton	Share in Saudi Arabia's Import	Annual Growth in Value (2019-2023) %	Annual Growth in Volume (2019-2023) %	Annual Growth in Value (2022-2023) %	Unit value (USD/unit)
Belgium	163	121	40%	22%	5%	32%	1,343
Netherlands	154	111	36%	15%	6%	23%	1,381
USA	38	22	9%	-1%	-12%	-16%	1,691
France	22	19	5%	9%	-2%	-9%	1,175
Egypt	21	15	5%	33%	19%	15%	1,409

TOP EXPORTERS TO SAUDI ARABIA BY SHARE IN IMPORTS



Source: ITC (Trade Map)

To explore the market access conditions in Saudi Arabia: [Market Access Map \(macmap.org\)](https://macmap.org)

There, you can find comprehensive information about the market entry requirements and regulations in Saudi Arabia.



Italy Market

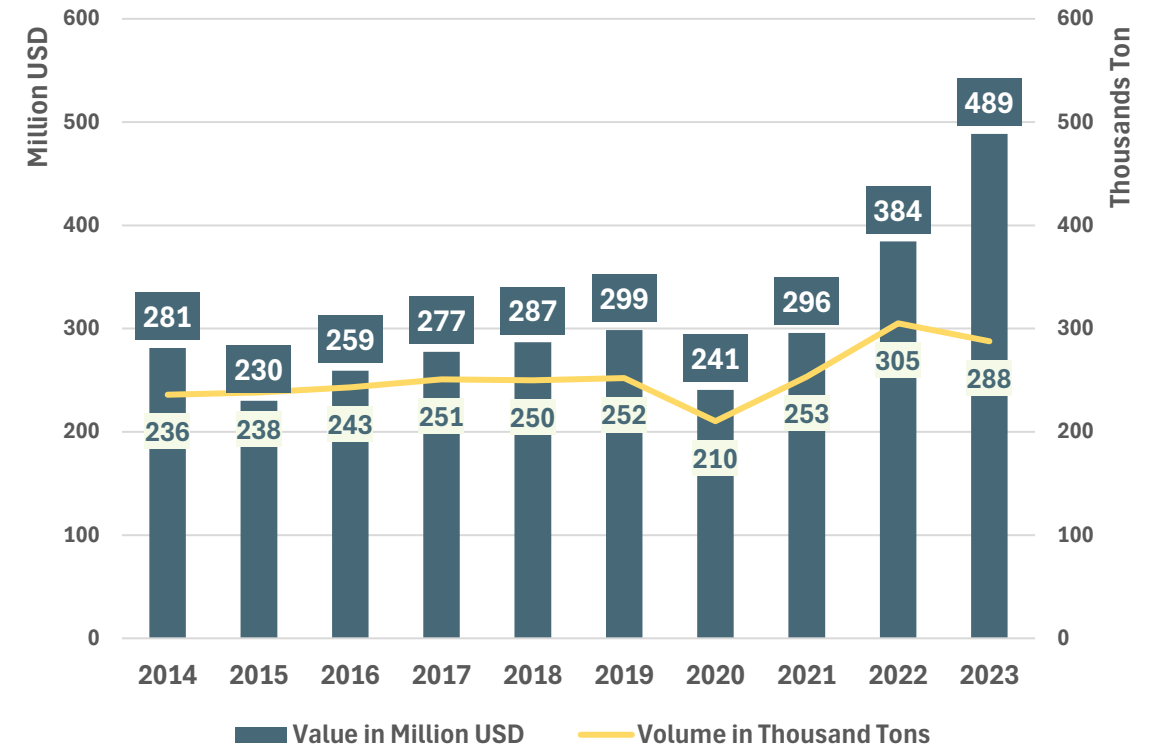
Overview of Italy's Import Performance in 2023 (Trade Map)

- Italy's imports represent 3.7%.
- Its ranking in world imports is 6th.
- Total Imports: 489 Million USD
- Import Quantity: 288 thousands tons
- Unit Value(USD/unit): 1,699

Annual Growth Analysis

- Annual Growth Value (2019-2023): 16%
- Annual Growth Quantity (2019-2023): 7%
- Annual Growth Value (2022-2023): 27%

Italy's Frozen potatoes: Volume and Value Trends (2014-2023)

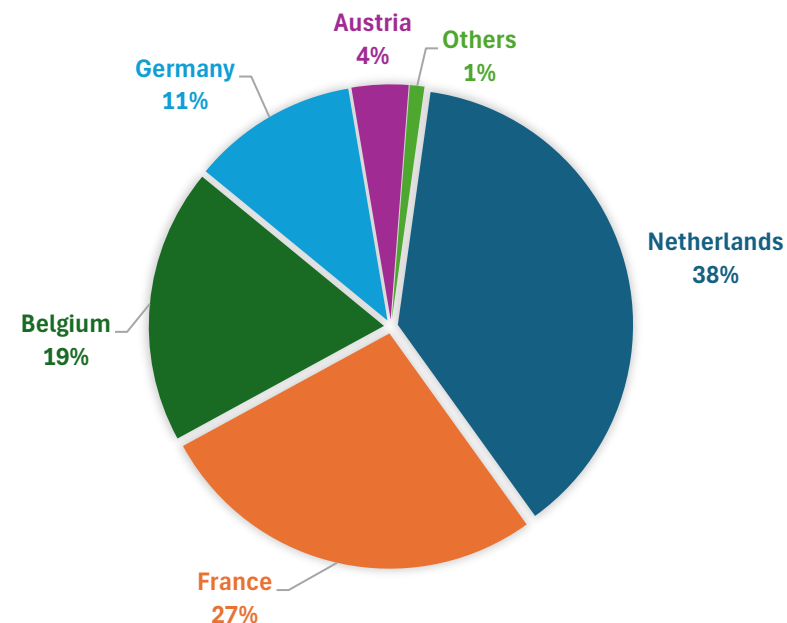


Top Exporters to Italy

Top Exporters to Italy by Share in Imports: Import Value, Volume, and Unit Value in 2023

TOP EXPORTERS TO ITALY BY SHARE IN IMPORTS

Exporters	Imported Value in Million USD	Imported Volume in Thousand Tons	Share in Italy's Import	Annual Growth in Value (2019-2023) %	Annual Growth in Volume (2019-2023) %	Annual Growth in Value (2022-2023) %	Unit value (USD/unit)
Netherlands	185	115	38%	22%	13%	26%	1,617
France	132	62	27%	13%	10%	21%	2,116
Belgium	92	63	19%	14%	1%	12%	1,468
Germany	56	36	11%	14%	1%	57%	1,560
Austria	19	10	4%	27%	25%	122%	1,972



Source: ITC (Trade Map)

Note: According to GOEIC data between 2014 and 2023, Egypt's presence in Italy's frozen potatoes market was minimal, with exports recorded only in 2021, amounting to \$87,000 and 165 tons. In 2022, there were no exports, and in 2023, exports declined by \$4,000 in value and 3 tons in volume. However, during the first nine months of 2024, Egypt's exports to Italy saw a remarkable increase, reaching \$414,000 and 399 tons.

To explore the market access conditions in Italy: [Market Access Map \(macmap.org\)](https://macmap.org)

There, you can find comprehensive information about the market entry requirements and regulations in Italy.

Conclusion

- In 2023, the global demand for frozen prepared or preserved potatoes (HS code 200410) reached \$13 billion and 9 million tons. This reflects an impressive annual growth rate of 15% in value and 5% in volume from 2019 to 2023. Egypt's contribution to this market was substantial, with exports totaling \$155 million and 129,000 tons in 2023.
- The major importing markets for these products include the USA, with a 16% share, the UK at 10%, France at 7%, Japan at 6%, Germany at 4%, and Italy at 4%. Collectively, these markets account for approximately 47% of global imports. On the exporting side, Belgium leads with 33% of the market, followed by the Netherlands at 22%, Canada at 14%, and the USA at 11%. Notably, the USA plays a dual role as both a significant importer and the fourth-largest exporter.
- The Export Potential Map identifies the markets with greatest potential for Egypt's exports of 200410 Potatoes, prepared/preserved, frozen are Saudi Arabia and Italy. Saudi Arabia shows the largest absolute difference between potential and actual exports in value terms, leaving room to realize additional exports worth \$9.5 mn and Italy \$5.4 mn.
- Saudi Arabia holding 3.1% of global imports and ranked 7th, demonstrates exceptional potential, achieving a 16% growth in market value and a 4% increase in volume between 2019 and 2023. Notably, the market value rose by 19% from 2022 to 2023. Similarly, Egypt's performance has been remarkable, with a 33% growth in market value and a 19% increase in volume over the same period, alongside a 15% rise in value from 2022 to 2023.
- Italy, holding 3.7% of global imports and ranked 6th, saw a 16% increase in value and a 7% rise in volume over the same period and 27% growth in value between (2022 to 2023). The primary exporters to Italy are the Netherlands (38%), France (27%), and Belgium (19%).

References

- **General Organization for Export and Import Control (GOEIC)**
- **ITC (International Trade Centre)**
- **Trade Map**
- **Market Access Map**
- **Export Potential Map**

Appendix

- [Frozen Potatoes Attachments - Google Drive](#)

FEC Market Intelligence Unit :

For more details, please check our website:

www.feceg.com

Facebook Page: Food Export Council

Email: foodexportcouncil@feceg.com



المجلس التصديري للصناعات الغذائية
مصر
FOOD EXPORT COUNCIL
EGYPT





Thank you



المجلس التصديري للصناعات الغذائية

مصر

FOOD EXPORT COUNCIL

EGYPT