



PREPARED OR PRESERVED POULTRY MEAT, WITH A FOCUS ON EGYPT'S EXPORT POTENTIAL

HS Code: 160239

Sep 2024



المجلس التصديري للصناعات الغذائية
مصر
FOOD EXPORT COUNCIL
EGYPT

Agenda

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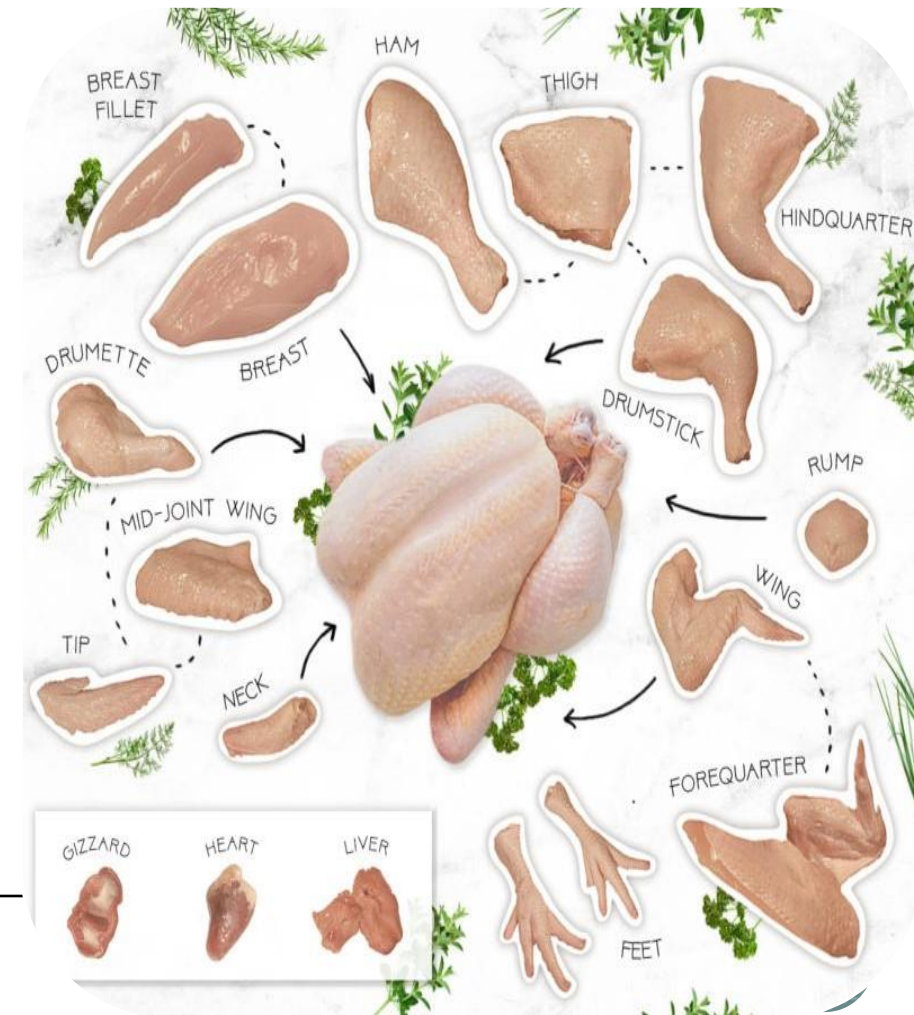
Overview of Egypt's Export

Recommended Markets

- UK Market
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Product Overview

Product Name: Prepared or preserved meat or meat offal of ducks, geese and guinea fowl of the species domesticus (excl. sausages and similar products, finely homogenised preparations put up for retail sale as infant food or for dietetic purposes, in containers of a net weight of \leq 250 g, preparations of liver and meat extracts and juices)

HS Code: 160239

Prepared or preserved meat or meat offal of domestic ducks, geese, and guinea fowl excludes sausages, finely homogenized preparations for infant food or dietetic purposes in containers of 250 grams or less, and preparations of liver, meat extracts, and juices. This category includes various preserved meat products such as canned, jarred, cured, or smoked meats suitable for consumption.



Introduction

This report delves into the global demand for prepared duck, goose, and guinea fowl meat, with a focus on Egypt's export potential in this industry. The analysis is based on HS code 160239, which recorded a global export value of \$867 million USD and 157 thousand tons in 2023.

In 2023, Egypt's exports in the broader meat preparations sector reached \$8 million USD and 1,500 tons. Specifically, under HS code 160239—covering prepared or preserved meat or meat offal of ducks, geese, and guinea fowl of the species domesticus (excluding sausages, finely homogenized preparations for infant food or dietetic purposes, and certain other preparations)—Egypt exported \$5 million USD and 965 tons.

Does Egypt have growth opportunities in this sector (HS Code: 160239)? Which countries offer the greatest potential for expanding Egypt's exports in this product category?



Meat Preparations Export Market Analysis by HS Code (2023)

HS Code	Description	Import Value in Million USD in 2023	Top Importing Markets	Export Value in Million USD in 2023	Top Exporting Markets	Egypt Export Value in Thousands USD (GOEIC)
160100	Sausages and similar products, of meat, meat offal, blood or insects; food preparations based on these products	3,214	Netherlands (10%), Hungary (8%), Mexico(8%), Denmark (5%), Slovakia (5%), Spain (4%), Kazakhstan (4%), Romania (4%) Others 52%	4,184	Italy (20%), Spain (17%), Poland (15%), Netherlands (7%), Denmark (5%) , Hungary (4%) Others 32%	5
160210	Homogenised prepared meat, offal, blood or insects, put up for retail sale as infant food or for dietetic purposes, in containers of <= 250	87	Slovakia (14%), Italy (12%), Hungary (10%), Spain (9%), Portugal (8%), Romania (6%) Others 41%	77	Czech Republic (27%), Poland (23%), Spain (12%), Netherlands (8%), Jordan (5%) Others 25%	1,771
160231	Meat or offal of turkeys "Gallus domesticus", prepared or preserved (excl. sausages and similar products, and finely homogenised preparations put up for retail sale as infant food or for dietetic purposes, in containers of a net weight of <= 250 g, preparations of liver and meat extracts and juices)	648	France (10%), Netherlands (9%), UK (9%), Mexico (6%), Germany (5%), Italy (5%), USA (4%) Others 52%	611	Germany (15%), USA (14%), Poland (12%), Belgium (11%), Hungary (7%), Others 41%	0.702
160232	Meat or offal of fowls of the species "Gallus domesticus", prepared or preserved (excl. sausages and similar products, finely homogenised preparations put up for retail sale as infant food or for dietetic purposes, in containers of a net weight of <= 250 g, preparations of liver and meat extracts and juices)	10,012	Japan (22%), UK (19%), Netherlands (7%), France (6%), Germany (6%), USA (5%) Others 35%	10,553	Thailand (26%), China (11%), Germany (9%), Poland (9%), Netherlands (9%), Others 36%	-
160239	Prepared or preserved meat or meat offal of ducks, geese and guinea fowl of the species domesticus (excl. sausages and similar products, finely homogenised preparations put up for retail sale as infant food or for dietetic purposes, in containers of a net weight of <= 250 g, preparations of liver and meat extracts and juices)	685	Germany (15%), Saudi Arabia (11%), UK (8%), Netherlands (8%), Spain (7%), Japan (7%) Others 44%	867	China (27%), Thailand (14%), Malaysia (12%), Netherlands (8%), Spain (8%) , Others 31%	5,037
160250	Prepared or preserved meat or offal of bovine animals (excl. sausages and similar products, finely homogenised preparations put up for retail sale as infant food or for dietetic purposes, in containers of a net weight of <= 250 g, preparations of liver and meat extracts and juices)	2,759	USA (22%), UK (12%), Canada (8%), Germany (6%), France (5%) Others 47%	3,045	Brazil (21%), USA (9%), Ireland (8%), Poland (8%), Germany (8%) Others 46%	1,302
160290	Prepared or preserved meat, offal, blood or insects (excl. meat or offal of poultry, swine and bovine animals, sausages and similar products, finely homogenised preparations put up for retail sale as infant food or for dietetic purposes, in containers of a net weight of <= 250 g, preparations of liver and meat extracts and juices)	104	Netherlands (17%), Portugal (11%), Italy (7%), Sweden (6%), Bahrain (5%), Spain (5%) Others 49%	146	Netherlands (25%), Italy (17%), Ireland (11%), Spain (7%), Poland (6%), Others 34%	0.230

Challenges in the Meat Sector

1. Limited Export Contribution from Egypt:

- **Low export value:** Egypt's export contribution to global markets remains significantly low across all categories compared to global trade volumes. For instance:
 - **Sausages (HS 160100):** Egypt exports only **5,000 USD**, a negligible share compared to the global import value of **3.2 billion USD**.
 - **Turkey meat preparations (HS 160231):** Export value is only **702 USD**, indicating a lack of market penetration.
 - For some products like **prepared chicken meat (HS 160232)**, Egypt records **zero exports** despite the substantial global market value.

2. Dependence on a Few Products:

- Egypt's meat exports are heavily reliant on specific products, such as **prepared poultry meat (HS 160239)**, which accounted for **5 million USD** of the total. This over-reliance limits diversification and increases vulnerability to market shifts.

3. Market Access Barriers:

- **Tariff and non-tariff barriers:** These can limit Egypt's access to high-potential markets. This includes compliance with stringent food safety standards, labeling requirements, and quotas imposed by key markets like the EU markets.
- For example, in the EU, processed meat products often face strict regulations related to **residue testing** and **packaging standards**.

4. Infrastructure and Supply Chain Limitations:

- Inadequate **cold chain logistics** and processing capabilities could hinder Egypt's ability to compete with established exporters in terms of product freshness and quality.
- Delays in transportation and storage challenges impact export competitiveness.

Opportunities for Improvement

To overcome these challenges, Egypt could focus on:

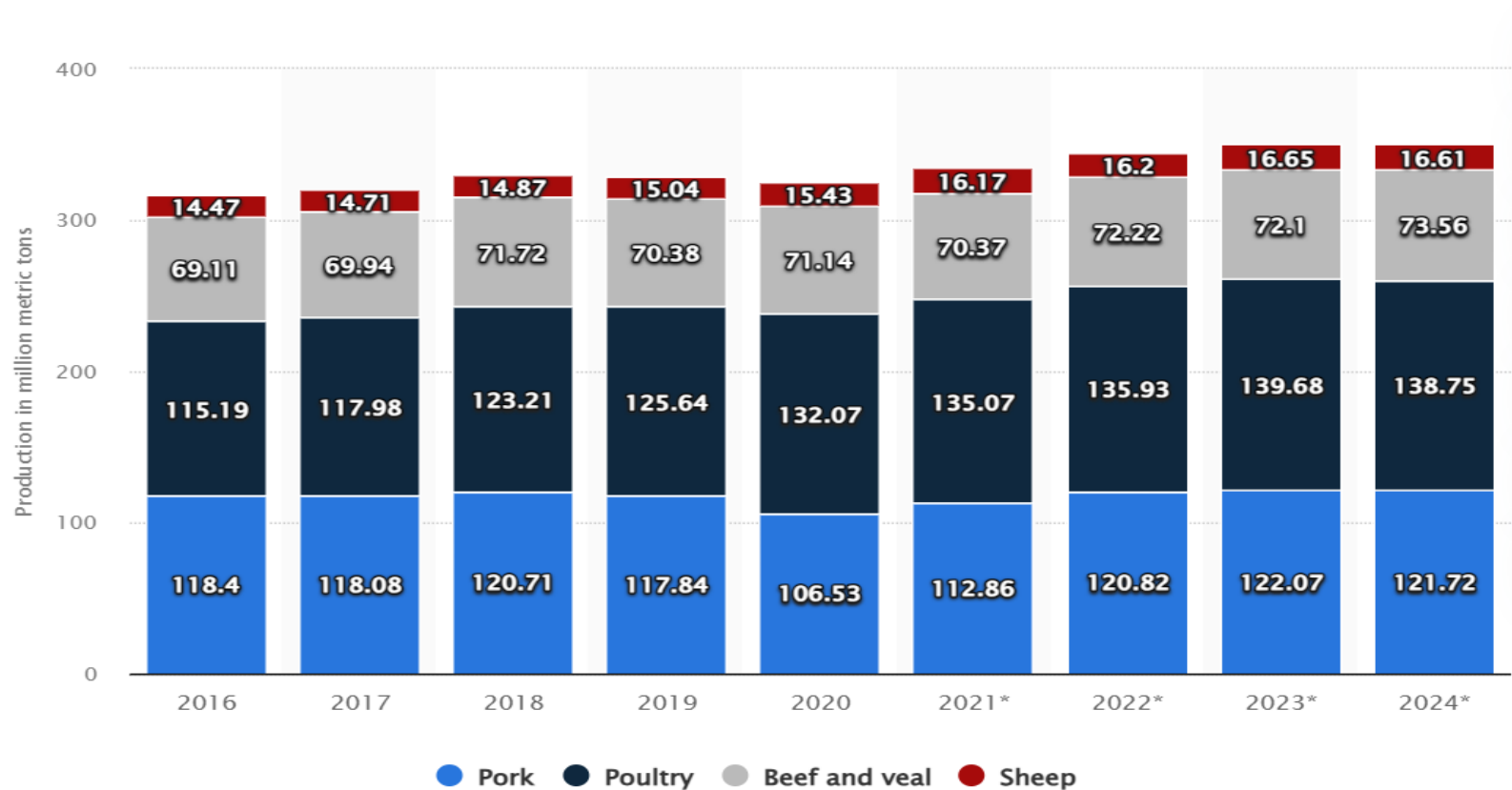
- 1.Expanding into High-Demand Markets:** Prioritize countries like Japan, Netherlands, the USA, and Germany, where demand is significant but Egypt's presence is negligible.
- 2.Improving Value-Added Offerings:** Focus on dietetic, gourmet, or ready-to-cook products to capture niche segments.
- 3.Strengthening Supply Chains:** Invest in cold storage and logistics to ensure consistent quality and freshness.
- 4.Enhancing Compliance with Standards:** Align with international food safety and quality standards to gain better access to markets like the EU and Japan.
- 5.Developing Export-Oriented Policies:** Provide exporters with subsidies, training, and support to navigate tariff and non-tariff barriers.

In the report, we will focus on **HS Code 160239**: *Prepared or preserved meat or meat offal of ducks, geese, and guinea fowl of the species domesticus*. This product demonstrates a significant export value for Egypt, reaching **5.037 million USD**.

By examining this HS code, we aim to analyze:

- 1.Egypt's Current Position:** Evaluating export performance and identifying strengths and weaknesses in this category.
- 2.Global Market Trends:** Assessing demand in leading markets and identifying opportunities for growth.
- 3.Challenges and Barriers:** Addressing issues related to compliance, supply chain efficiency, and competition.
- 4.Strategies for Expansion:** Proposing actionable recommendations to increase Egypt's market share in top importing countries.

Production of meat worldwide from 2016 to 2024, by type (in million metric tons)*



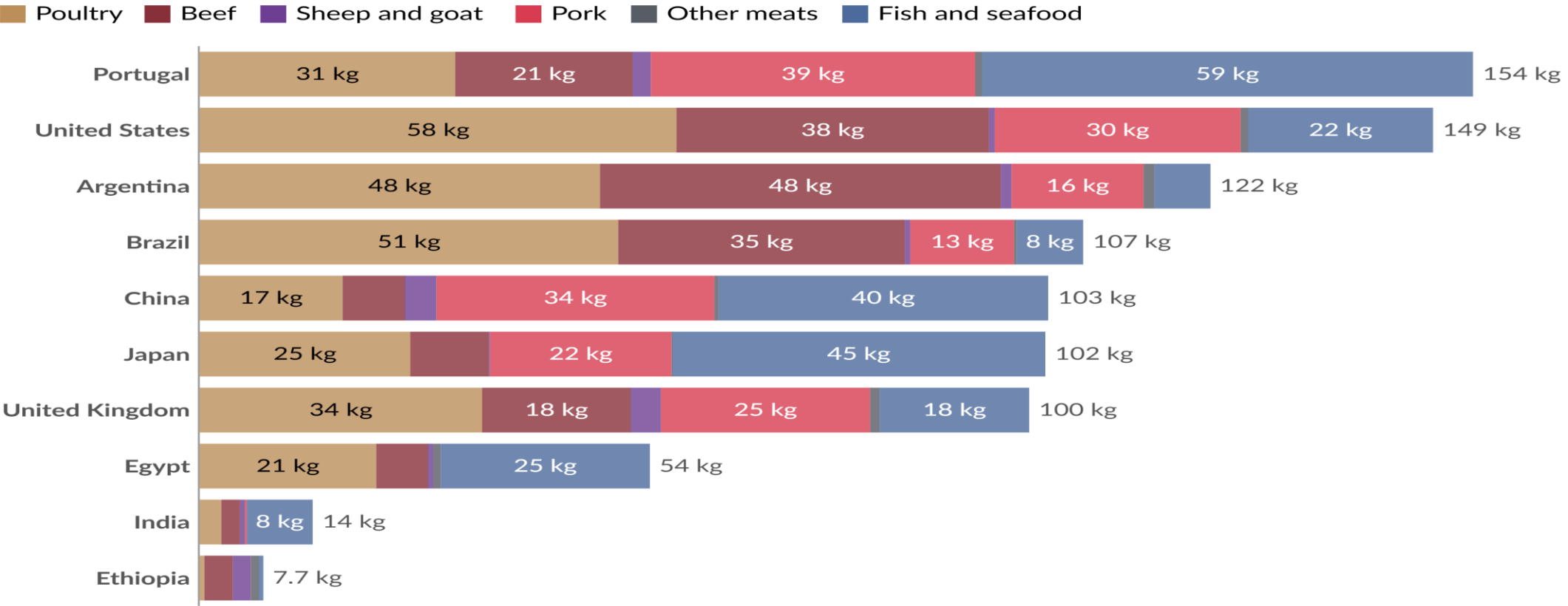
In 2024, the world's production of poultry is projected to amount to approximately 138.75 million metric tons, up from about 115 million metric tons in 2016. During this time period, poultry has overtaken pork as the most produced type of meat worldwide.

Source: Statista



Per capita meat consumption by type, 2021

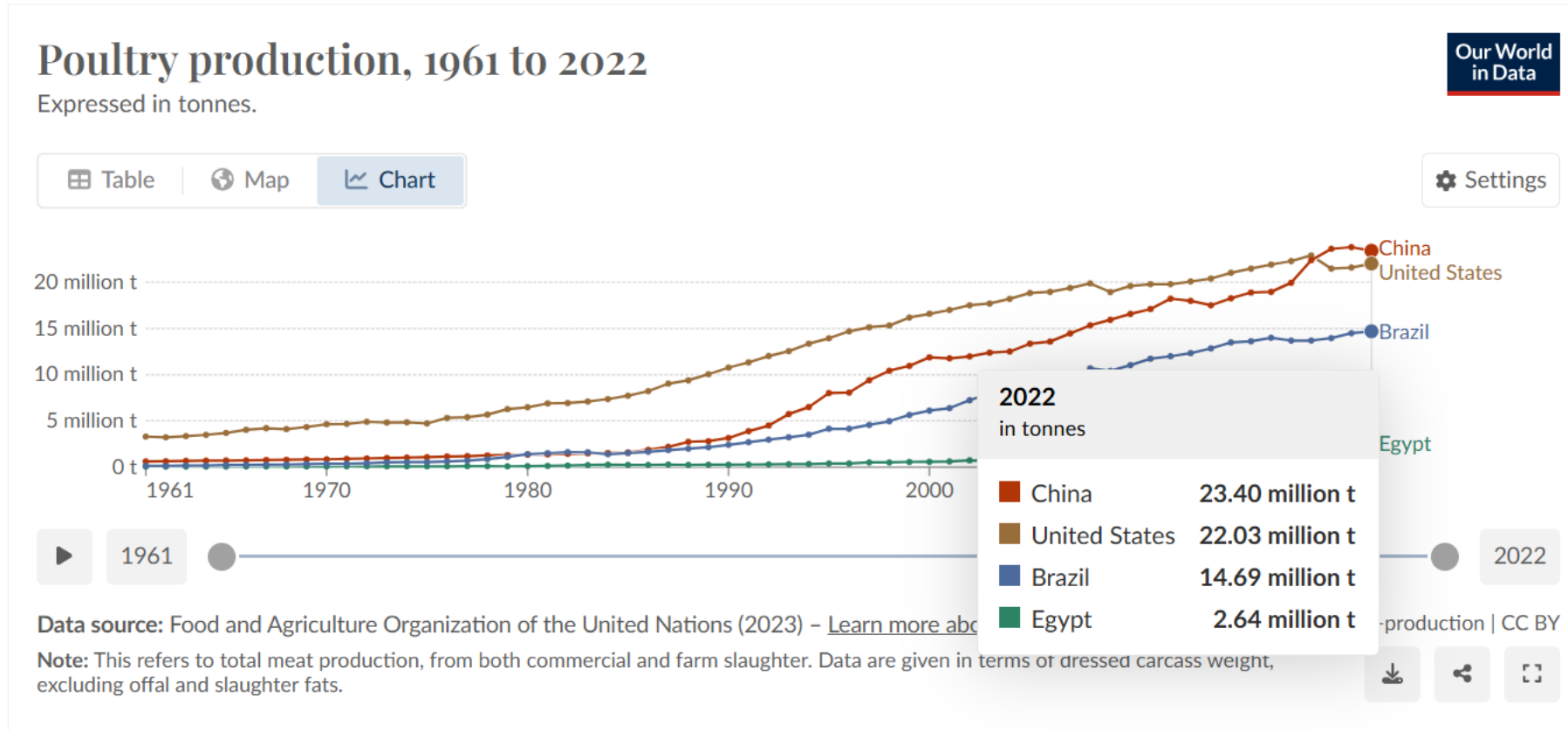
Per capita meat consumption by type, 2021



Data source: Food and Agriculture Organization of the United Nations (2023) OurWorldinData.org/meat-production | CC BY
Note: Data refers to meat 'available for consumption'. Actual consumption may be lower after correction for food wastage.



Global Production



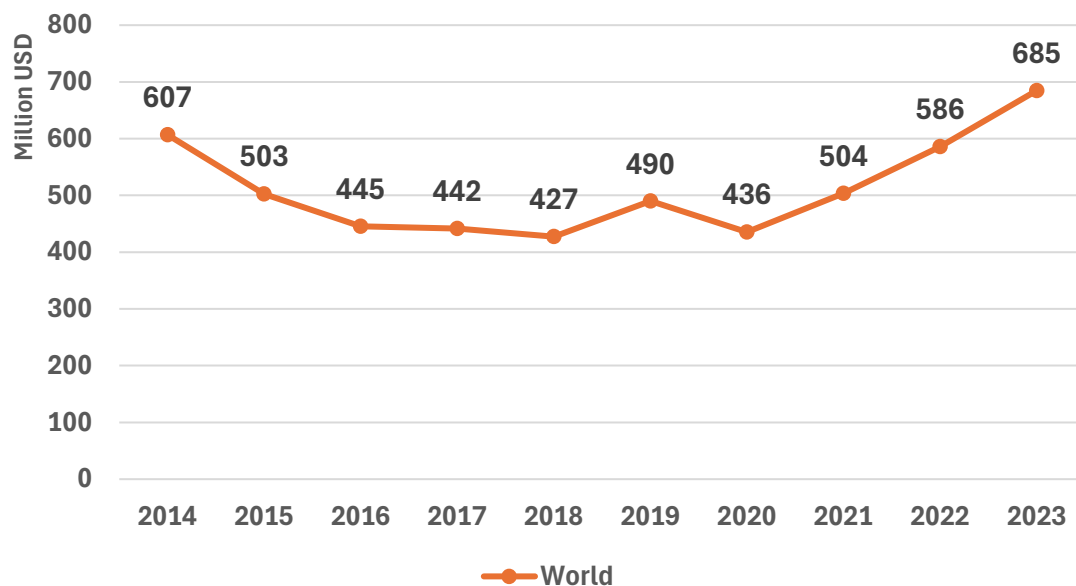
Egypt's poultry industry is characterized by its large scale of production. The country has an annual production of approximately 1.8 million MT of chicken, making it the largest producer of poultry in the MENA region, and represented about 96% from the total consumption.



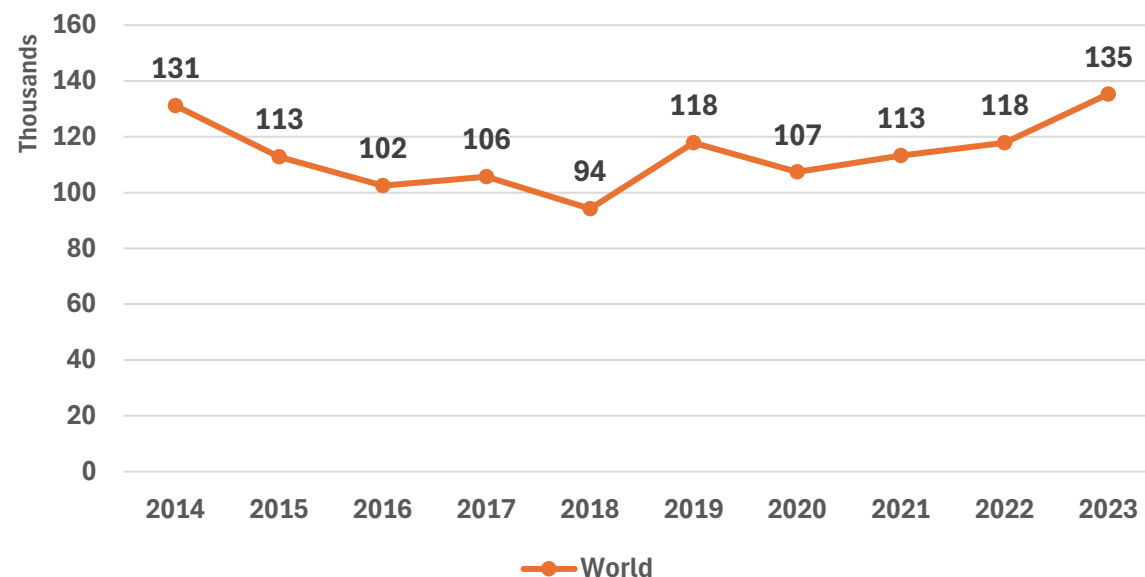
Global Imports and Trend Analysis

Hs Code: 160239

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



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



In 2023, the global imports of prepared or preserved meat products (HS Code 160239) reached a total value of USD 685 million, corresponding to a quantity of 135 thousand tons. Over the period 2019-2023, the annual growth in import value stood at 7%, while the quantity imported grew at a slower rate of 4%, indicating an increasing unit value of these products. Between 2022 and 2023, the annual growth in value was particularly significant at 17%, reflecting rising global demand or higher prices for these goods.

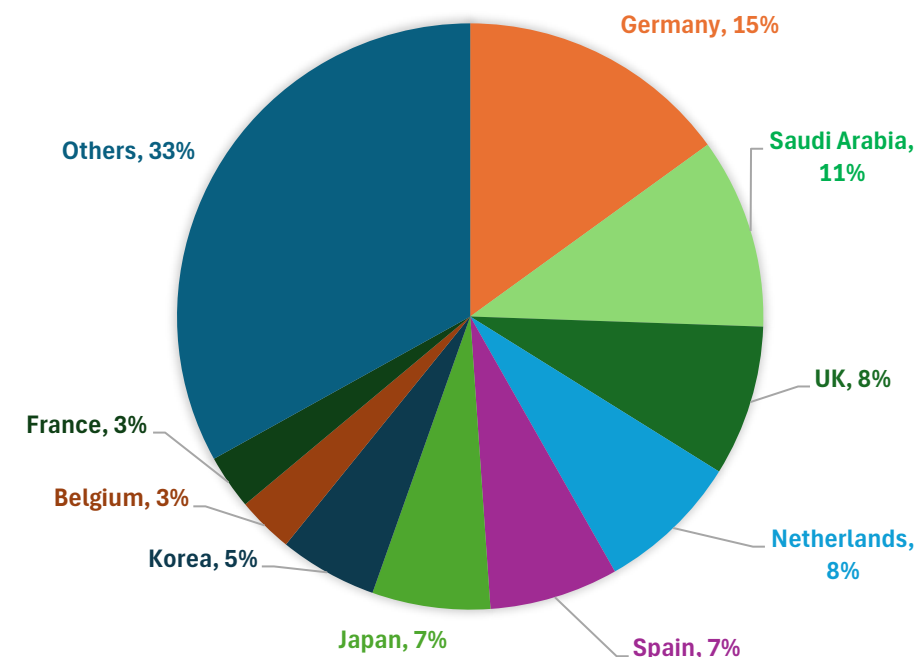
Source: ITC (Trade Map)

Top Importing Markets Globally in 2023

Top Importing Markets Globally: Import Value, Quantity, and Growth Trends 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.	Germany	102	13	15%	16%	7%	13%	7,670
2.	Saudi Arabia	72	14	11%	12%	5%	-5%	5,100
3.	UK	57	8	8%	6%	-2%	9%	7,306
4.	Netherlands	54	11	8%	17%	14%	-19%	4,870
5.	Spain	48	13	7%	-1%	-11%	-14%	3,680
6.	Japan	45	8	7%	-2%	-3%	-6%	5,424

TOP IMPORTING MARKETS GLOBALLY



In 2023 the top importing markets are Germany (15%), Saudi Arabia (11%), UK (8%), Netherlands (8%), Spain (7%), and Japan (7%) collectively 56%.

The data in orange represents mirror figures based on partner data.

The quantities shown in green are estimated by UNSD. For further information, please refer to the [UNSD explanatory note](#).

Source: ITC (Trade Map)

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 Tons	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.	China	230	49	27%	14%	12%	10%	4,707
2.	Thailand	122	19	14%	-6%	-7%	-3%	6,362
3.	Malaysia	106	22	12%	8%	2%	-10%	4,906
4.	Netherlands	69	8	8%	31%	20%	-18%	8,453
5.	Spain	69	14	8%	19%	7%	39%	4,956



In 2023 the top exporting markets are China (27%), Thailand (14%), Malaysia (12%), Netherlands (8%), Spain (8%) collectively 69%.

Note: While the Netherlands demonstrated remarkable growth as the fourth-largest global importer in 2023, with notable increases in both value and quantity, it also maintained a significant presence as the fourth-largest exporter in the same year. This dual role underscores the Netherlands pivotal position in the global trade landscape for the specified product category, reflecting its dynamic and multifaceted contributions to both import and export activities.

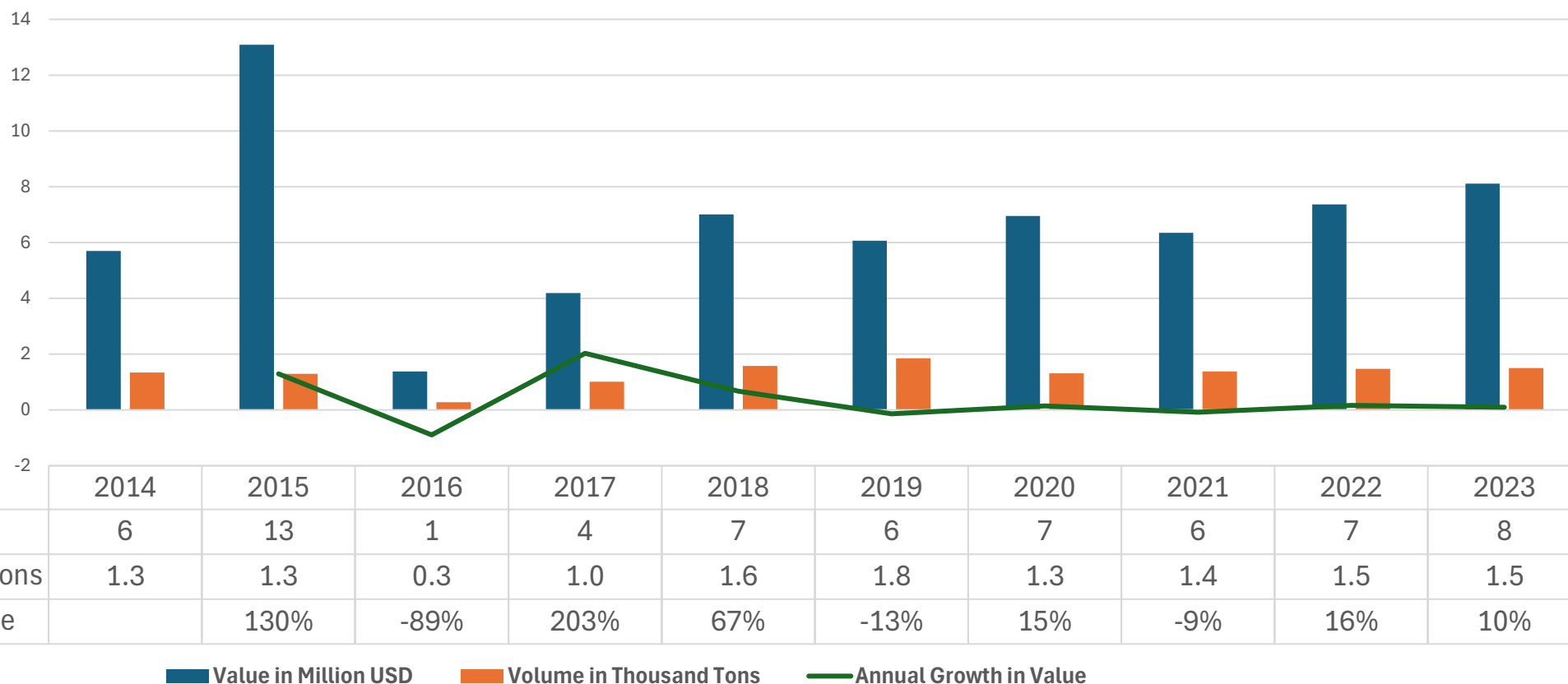
Source: ITC (Trade Map)





Overview of Egypt's Meat Preparations

Egypt Meat Preparations: Volume and Value (2014-2023) (GOEIC DATA)



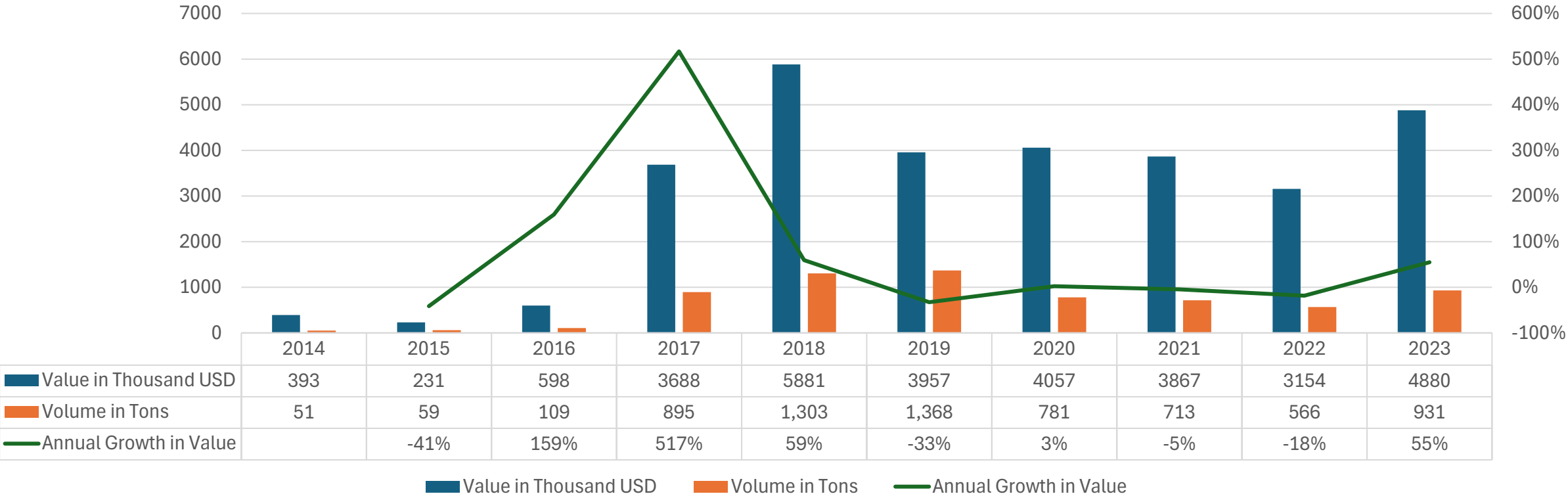
Note: The average unit price for meat preparations has experienced a gradual decline over the past three years. In 2022, the average unit price was 5,576 USD per ton, decreasing to 5,416 USD per ton in 2023, and further dropping to 5,235 USD per ton during the first nine months of 2024. This trend indicates potential changes in market conditions, such as increased competition or reduced production costs.





Overview of Egypt's Egypt Poultry Meat

Egypt Prepared or Preserved Poultry Meat: Volume and Value (2014-2023) GOEIC HS Code: 160239



Note: The average unit price for poultry meat has shown a slight increase over the past three years. In 2022, the average unit price was US\$5,010 per tonne, rising to US\$5,089 per tonne in 2023 and then rising to US\$5,098 per tonne during the first nine months of 2024. This upward trend reflects global market dynamics and potential shifts in supply and demand.





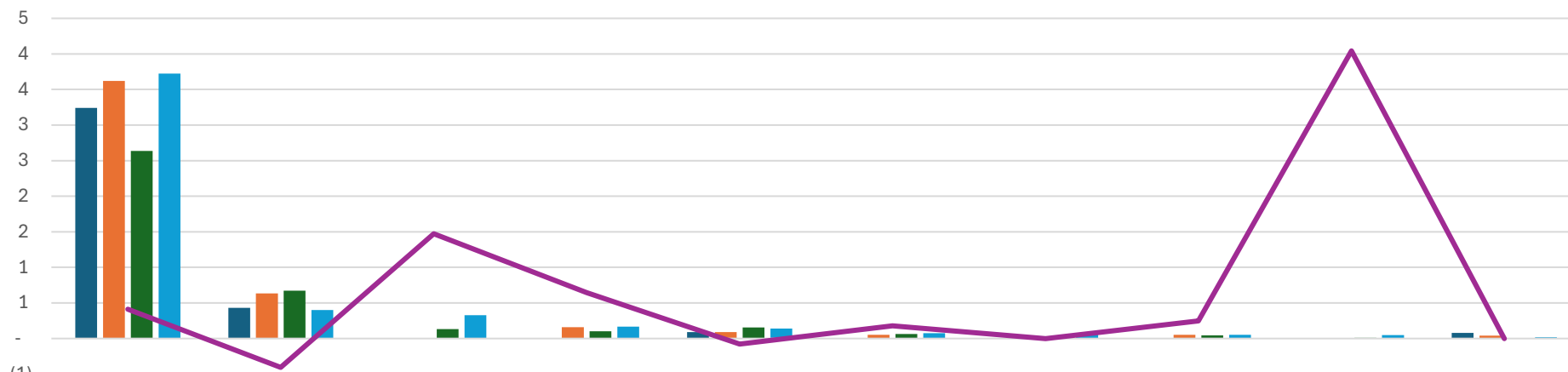
Egypt Export Destinations



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Egypt Prepared or Preserved Poultry Meat: Top Export Destinations and Growth Trends in 2023– GOEIC HS Code 160239

Egypt Prepared or Preserved Poultry Meat: Top Export Destinations and Growth Trends in 2023



(1)	Kuwait	United Arab Emirates	Bahrain	Côte d'Ivoire	Yemen	Mali	Libya	Kenya	Sudan	Tunisia
(1)										
Value Exported in 2020 in Million (USD)	3	0.430	0.008	-	0.089	-	-	-	-	0.080
Value Exported in 2021 in Million (USD)	3.62	1	0.00	0.16	0.09	0.05	-	0.05	-	0.04
Value Exported in 2022 in Million (USD)	3	1	0.13	0.10	0.15	0.06	-	0.04	0.01	-
Value Exported in 2023 in Million (USD)	4	0.400	0.329	0.17	0.14	0.08	0.08	0.05	0.05	0.016
Annual growth rate between (2022-2023) %	41%	-41%	147%	65%	-8%	18%	0%	25%	404%	0%

■ 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) %



Egypt Export Global on HS Code: 160239

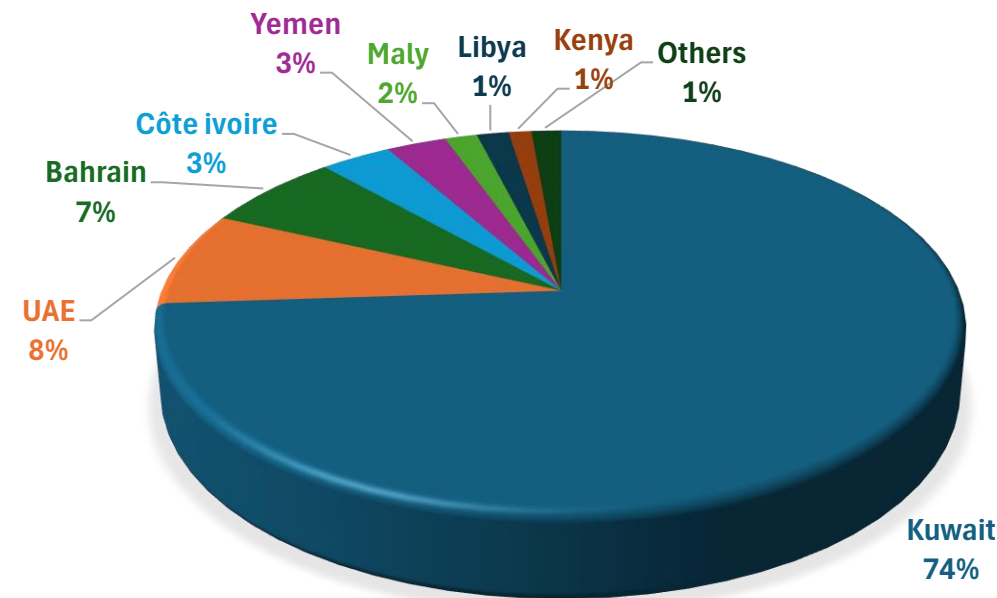
Global Export Position in 2023 (Trade Map)

- Egypt's Share in Global Exports: 0.6%
- Egypt's World Ranking: 19

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

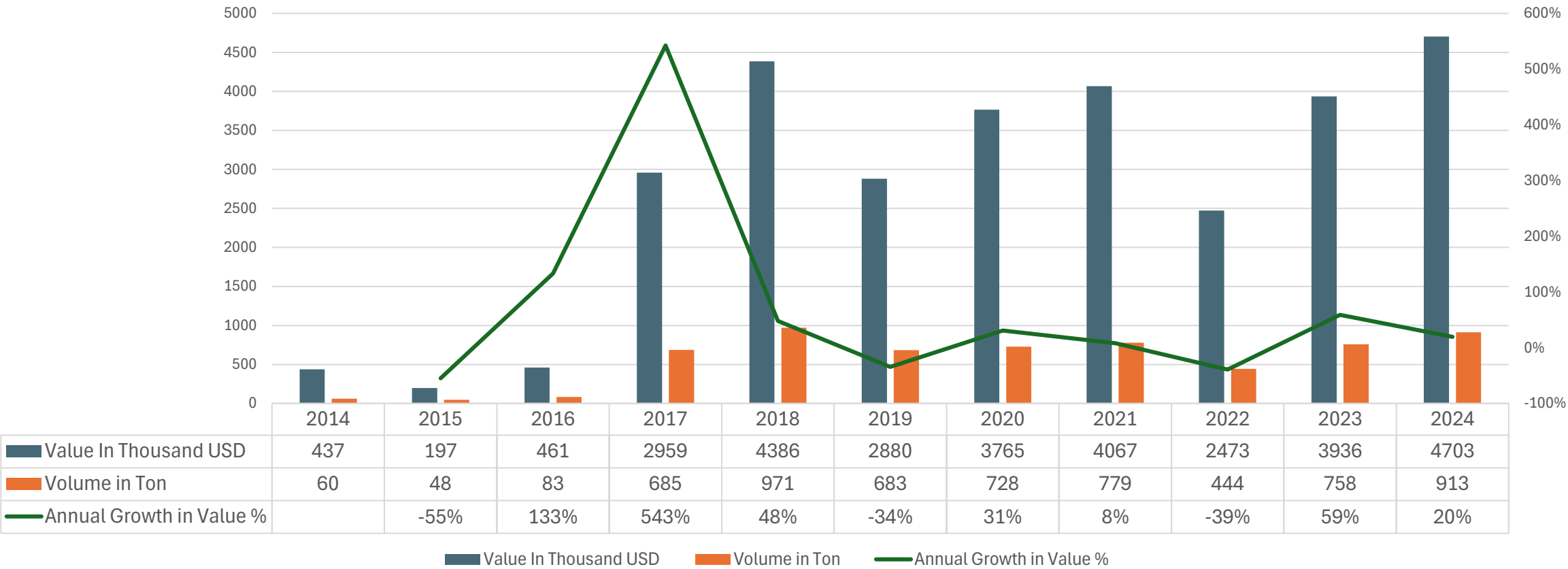
Rank	Country	Export Value in Thousand USD	Export Quantity in Ton	Share in Egypt's Export	Unit value (USD/unit)
1.	Kuwait	3,724	598	74%	6160
2.	UAE	400	93	8%	6057
3.	Bahrain	329	78	7%	4593
4.	Cote Ivoire	168	27	3%	6201
5.	Yemen	142	34	3%	3710
6.	Maly	76	20	2%	3704
7.	Libya	75	19	1%	3888
8.	Kenya	53	12	1%	4532

EGYPTIAN EXPORT MARKET SHARE BY COUNTRY IN 2023 GOEIC DATA



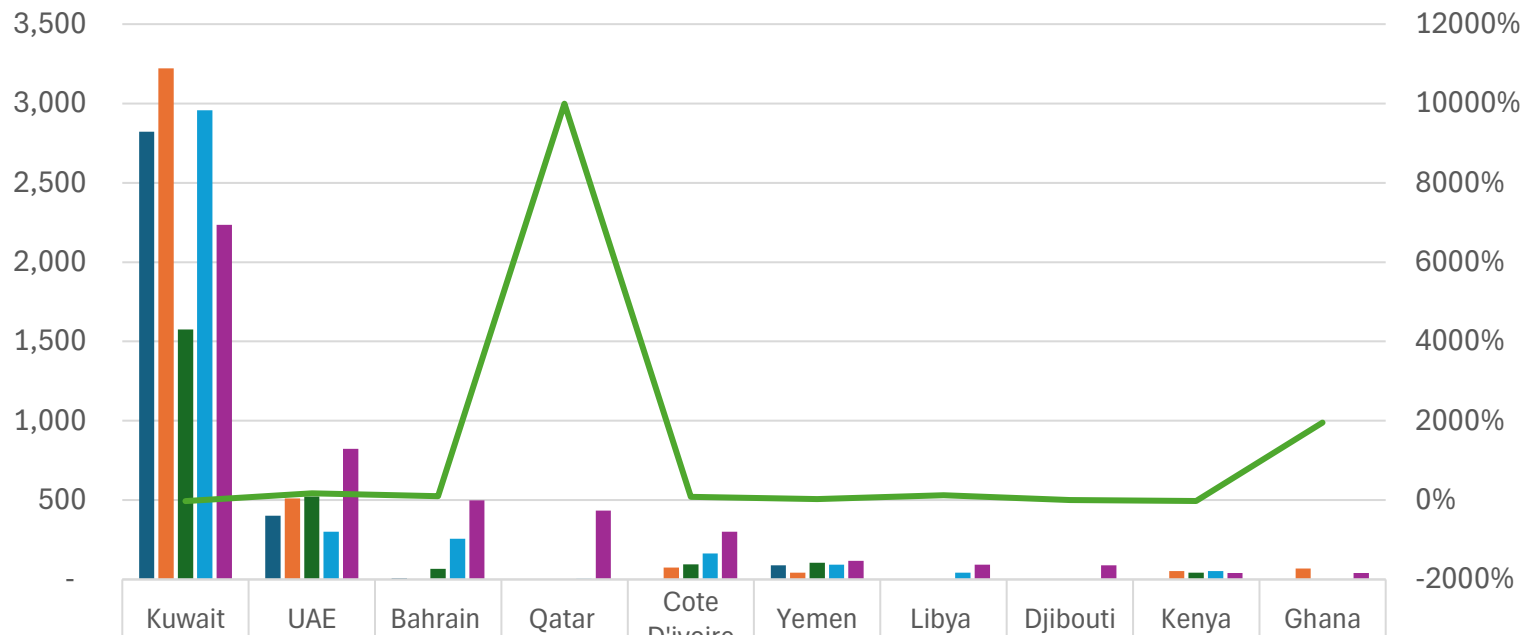
"Egypt's Exports of Prepared or Preserved Poultry Meat: Volume and Value (2014-2023)
GOEIC HS Code: 160239 During the First 9 Months of Each Year"

Egypt's Prepared or Preserved Poultry Meat During the First 9 Months of Each Year"



Egypt's Exports top destinations of prepared or preserved poultry meat During the First 9 Months of Each Year with Unit Prices" from(Jan - Sep)

Egypt's Exports top destinations of prepared or preserved poultry meat During the First 9 Months of Each Year"



Value Exported in 2020 in Thousand (USD)	2,823	401	8	-	-	89	-	-	-	-
Value Exported in 2021 in Thousand (USD)	3,222	510	0	-	76	43	-	-	53	69
Value Exported in 2022 in Thousand (USD)	1,576	523	67	-	95	104	-	-	43	-
Value Exported in 2023 in Thousand (USD)	2,957	300	256	4	164	94	42	-	53	2
Value Exported in 2024 in Thousand (USD)	2,235	823	499	434	301	118	93	89	42	41
Annual Growth Rate between (2023-2024) %	-24%	174%	95%	9994%	84%	25%	120%	0%	-22%	1957%

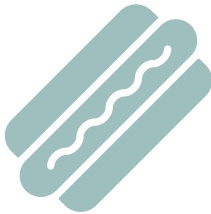
Country	Unit value (USD/unit) in 2024
Kuwait	5636
UAE	5018
Bahrain	4096
Qatar	4803
Cote Ivoire	5025
Yemen	3835
Libya	3888
Djibouti	3716
Kenya	5491
Ghana	6150

Analysis of Key Competitors for Egyptian Exporters (Brazil and Türkiye)



Overview of HS Code: 1602

Total Exports: 340 Billion USD
Export Quantity: 99 Million tons
Annual Growth in Value (2019-2023): 14%
Annual Growth in Quantity (2019-2023): 4%
Annual Growth in Value (2022-2023): 2%



Key HS Codes and Export Values

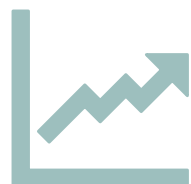
HS Code 160250 - Prepared or preserved meat or offal of bovine animals (excl. sausages and similar products) - Value: **647 Million USD**
HS Code 160232 - Meat or offal of fowls of the species "Gallus domesticus", prepared or preserved (excl. sausages) - Value: **377 Million USD**
HS Code 160231 - Meat or offal of turkeys "Gallus domesticus", prepared or preserved (excl. sausages and similar) - Value: **34 Million USD**
HS Code 160249 - Prepared or preserved meat and offal of swine, incl. mixtures (excl. hams, shoulders, and cuts) - Value: 13 Million USD
HS Code 160241 - Hams of swine and cuts thereof, prepared or preserved - Value: 2 Million USD
HS Code 160239: Value 13 Thousand USD



Top Importing Countries and Brazil Market Share

USA with 385 Million USD and 36% Market share.
UK 248 Million USD with 23%.
Netherlands with 147 Million USD and 14%.
Others 27%





Overview of HS Code: 1602

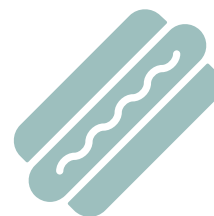
Total Exports: 114 Million USD

Export Quantity: 63 Thousand tons

Annual Growth in Value (2019-2023): 27%

Annual Growth in Quantity (2019-2023): 24%

Annual Growth in Value (2022-2023): -1%



Key HS Codes and Export Values

HS Code 160232 - Meat or offal of fowls of the species "Gallus domesticus", prepared or preserved (excl. sausages) - Value: **102 Million USD**

HS Code 160250 - Prepared or preserved meat or offal of bovine animals (excl. sausages and similar products) - Value: **9 Million USD**

HS Code 160231 - Meat or offal of turkeys "Gallus domesticus", prepared or preserved (excl. sausages and similar) - Value: **3 Million USD**

HS Code 160249 - Prepared or preserved meat and offal of swine, incl. mixtures (excl. hams, shoulders, and cuts) - Value: 288 Thousand USD

HS Code 160239: Value 112 Thousand USD



Top Importing Countries and Türkiye's market share

Venezuela with 19 Million USD and 17% Market share.

Iraq 18 Million USD with 16%.

Qatar with 11 Million USD and 10%.

Syrian Arab Republic 9 Million USD and 8%.

Others 49%

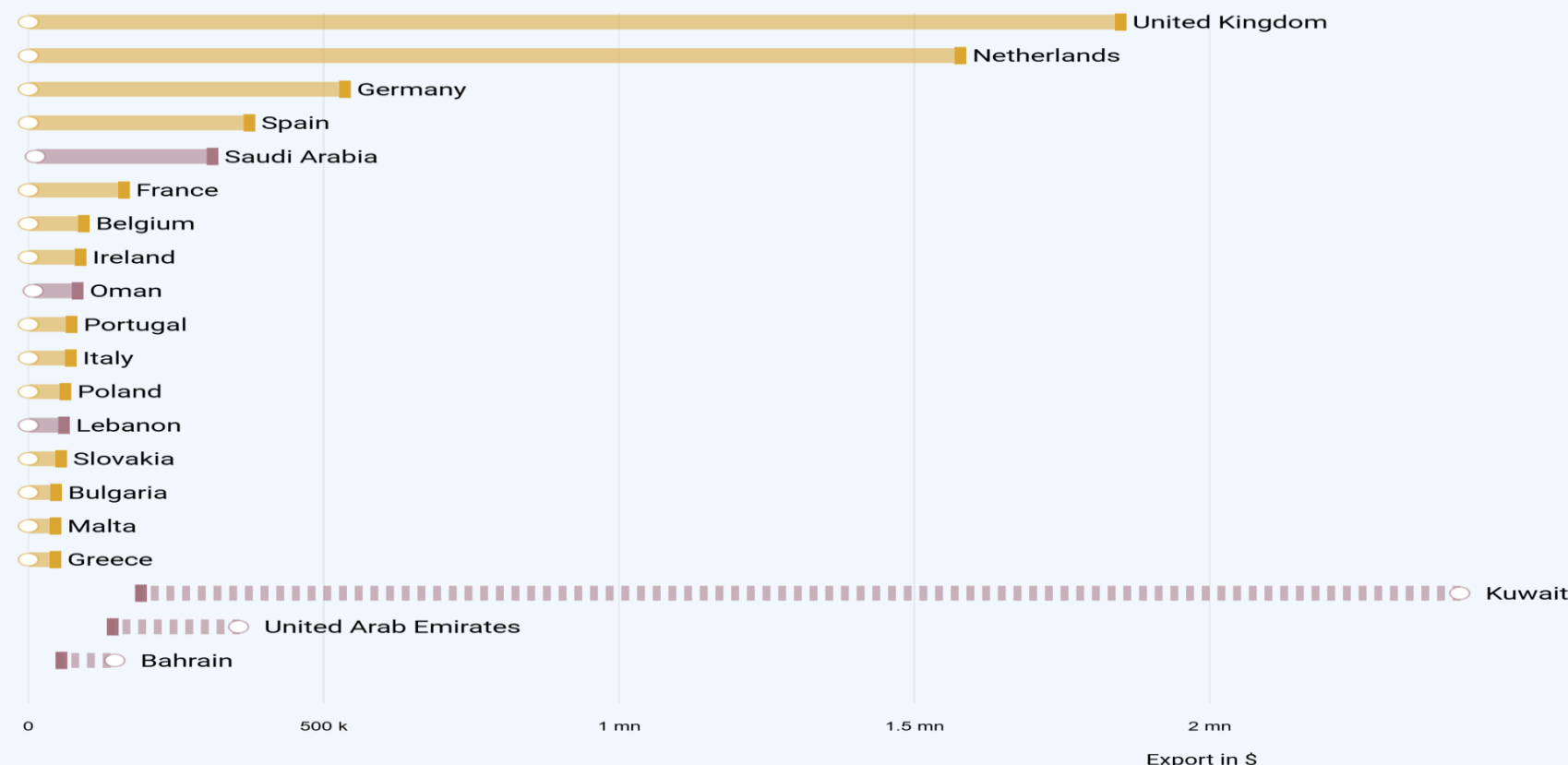


Top Markets for Egypt in Terms of Export Potential

Markets with potential for Egypt's exports of Meat/offal of ducks, prepared/preserved, n.e.s.

Legend

- Export potential
- Actual exports
- Potential to actual exports gap
- EU & West Europe
- Middle East



ITC Export Potential Map
exportpotential.intracen.org

Key findings

The markets with greatest potential for Egypt's exports of 160239 Meat/offal of ducks, prepared/preserved, n.e.s. are United Kingdom and Netherlands. United Kingdom shows the largest absolute difference between potential and actual exports in value terms, leaving room to realize additional exports worth \$1.8 mn.






Overview of Egypt's Declining Export Potential

- Data from the Export Potential Map highlights a significant decline in export potential for Kuwait, the UAE, and Bahrain, with Kuwait experiencing the largest drop, estimated at \$167. Although actual exports to Kuwait have reached \$2.4 million—far exceeding the projected potential—this decline is expected to persist over the next five years. Nevertheless, there remains untapped potential, suggesting that targeted strategic efforts could unlock additional export opportunities.
- Kuwait's poultry imports have decreased due to imposed bans on importing poultry products from regions affected by avian influenza. For instance, in December 2023, Kuwait banned imports of fresh, chilled, frozen, and processed poultry meat and table eggs from 12 U.S. states and Morbihan, France, unless they were heat-treated at 70°C.



Source: ITC (Export Potential Map),
[Kuwait bans import of meat and eggs | arabtimes](#)

Export Potential of Egypt Across Top Countries

	Country	Export Potential	Actual Export Value	MFN Applied Tariff	Preferential tariff for Egypt
	UK	\$1.8 mn	\$0	2313 GBP/1,000 kg with an Ad Valorem Equivalent (AVE) of 48.77%	0% (UK-Egypt Association Agreement)
	Netherlands	\$1.6 mn	\$0	2,765 EUR/1000 kg net with an Ad Valorem Equivalent (AVE) of 54.82% ²³¹³	0% (FTA, EU-Egypt)
	Germany	\$513 k	\$0	2,765 EUR/1000 kg net with an Ad Valorem Equivalent (AVE) of 54.82%	0% (FTA, EU-Egypt)
	Spain	\$315 k	\$0	2,765 EUR/1000 kg net with an Ad Valorem Equivalent (AVE) of 54.82%	0% (FTA, EU-Egypt)
	Saudi Arabia	\$288 k	\$12 k	5%	0% (Regional group, League of Arab States)

Source: ITC (Market Access Map)



UK Market

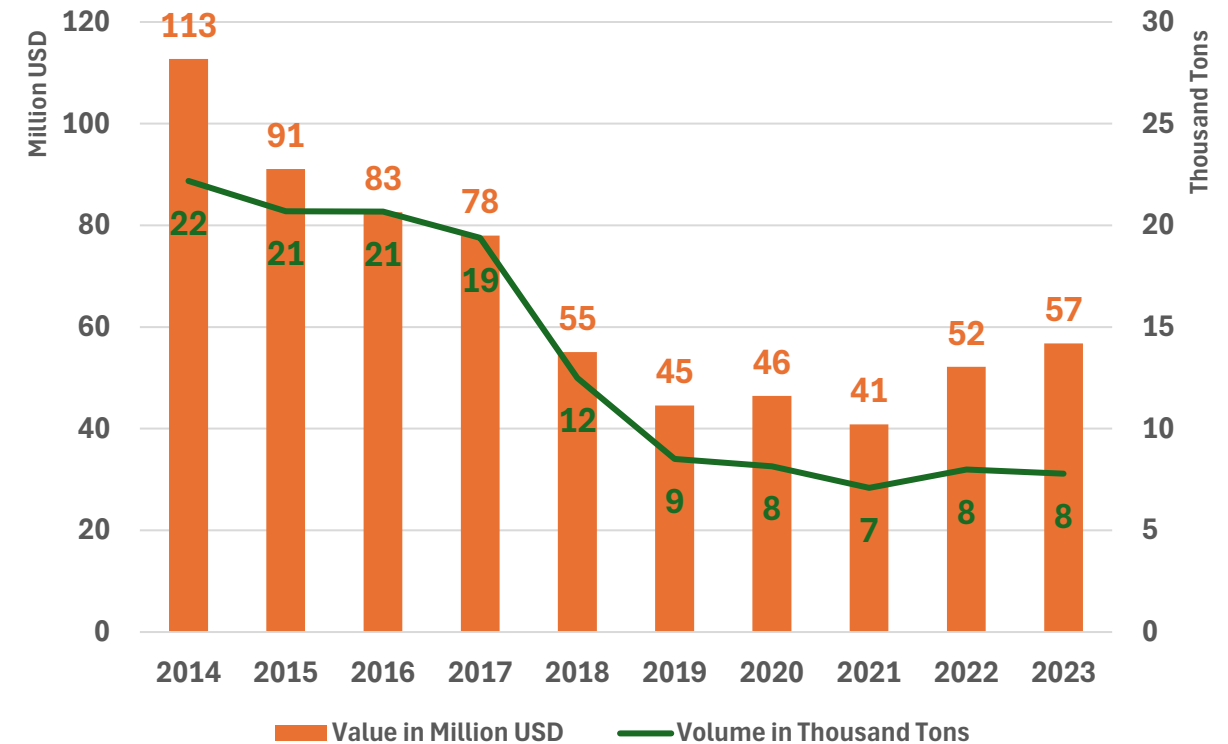
Overview of UK's Import Performance in 2023 (Trade Map)

- UK's imports represent 8.3%.
- Its ranking in world imports is 3rd.
- Total Imports: 57 Million USD
- Import Quantity: 7,789 tons
- Unit Value(USD/unit): 7,306

Annual Growth Analysis

- Annual Growth Value (2019-2023): 6%
- Annual Growth Quantity (2019-2023): -2%
- Annual Growth Value (2022-2023): 9%

UK's Prepared or Preserved Poultry Meat: Volume and Value Trends (2014-2023)



Source: ITC (Trade Map)

The substantial reduction in the UK's poultry meat imports, from \$113 million to \$57 million in 2023, can be attributed to several key factors:

1.Increased Domestic Production: The UK has bolstered its domestic poultry meat production, which now accounts for 48.2% of the nation's total meat output, up from 37.3% in 1994. This rise in local production has diminished the reliance on imports. [Farmers Guardian](#)

2.Trade Disruptions Post-Brexit: The UK's departure from the EU introduced new trade barriers, including tariffs and regulatory checks, complicating import processes and increasing costs. These challenges have led to a 56% decrease in poultry meat exports to the EU, from 380,000 tonnes in 2020 to 167,000 tonnes in 2023, and have similarly affected imports. [British Poultry](#)

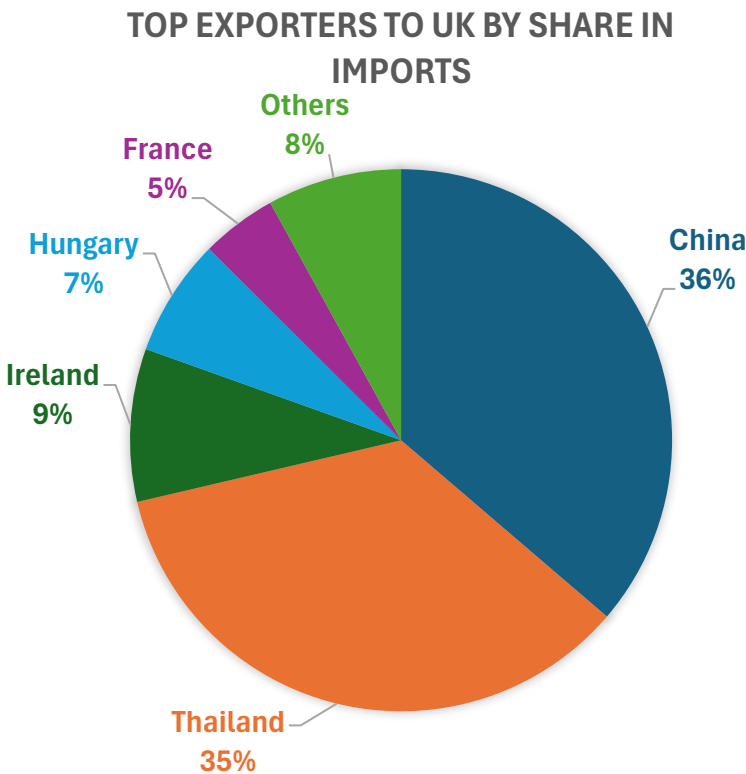
3.Labor Shortages: The UK poultry industry has faced significant labor shortages, particularly in farming and processing sectors, due to Brexit and the COVID-19 pandemic. This has constrained production capacities and disrupted supply chains, impacting both domestic production and the ability to manage imports effectively. [Mordor Intelligence](#)

4.Economic Factors: Rising costs of production inputs, such as feed, energy, and labor, have increased the prices of domestically produced poultry meat. This has led to higher retail prices, potentially reducing consumer demand and, consequently, the volume of imports needed to meet market requirements.

Top Exporters to the UK

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

Rank	Exporters	Imported Value in Million USD	Imported Volume in Tons	Share in UK's Import	Annual Growth in Value (2019-2023) %	Annual Growth in Volume (2019-2023) %	Annual Growth in Value (2022-2023) %	Unit value (USD/unit)
1.	China	21	4,130	36%	15%	9%	-2%	4,994
2.	Thailand	20	1,895	35%	12%	4%	84%	10,502
3.	Ireland	5	523	9%	36%	23%	50%	9,912
4.	Hungary	4	370	7%	-18%	-32%	-53%	10,724
5.	France	3	185	5%	-1%	-13%	-20%	13,741



Source: ITC (Trade Map)

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

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



Netherlands Market

Mirror Data

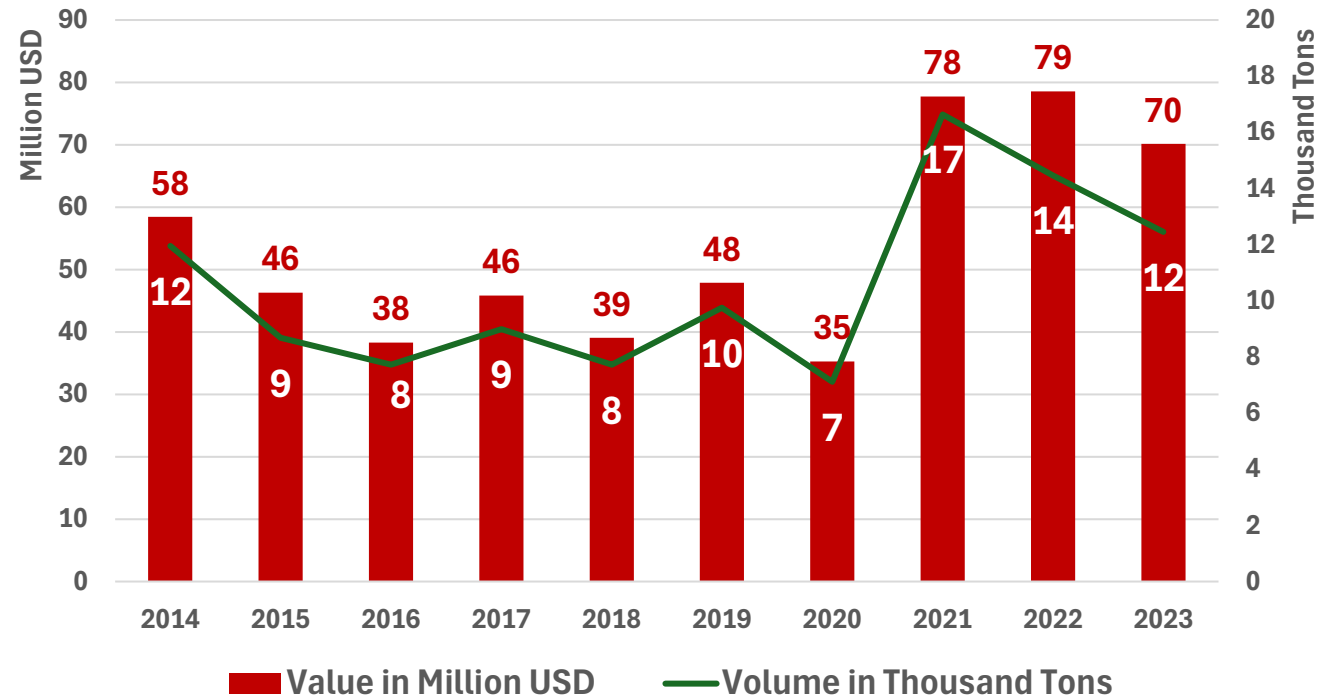
Overview of Netherlands Import Performance in 2023 (Trade Map)

- Netherlands's imports represent 7.9%.
- Its ranking in world imports is 4th.
- Total Imports: 70 Million USD
- Import Quantity: 12 thousand tons
- Unit Value(USD/unit): 5,632

Annual Growth Analysis

- Annual Growth Value (2019-2023): 10%
- Annual Growth Quantity (2019-2023): 6%
- Annual Growth Value (2022-2023): -11%

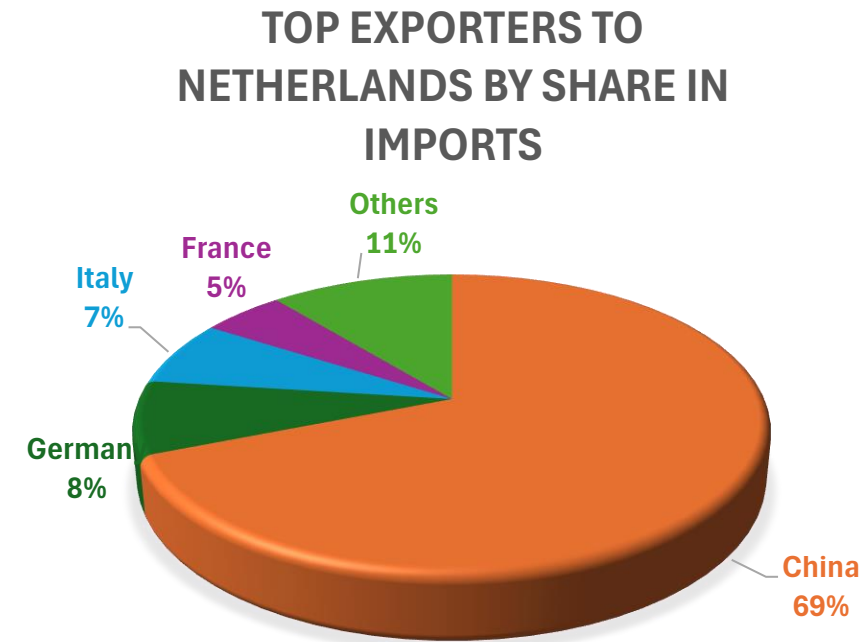
Netherlands Prepared or Preserved Poultry Meat: Volume and Value Trends (2014-2023)



Top Exporters to the Netherlands in 2023

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

Rank	Exporters	Imported Value in Million USD	Imported Volume in Tons	Share in Netherlands Import	Annual Growth in Value (2019-2023) %	Annual Growth in Volume (2019-2023) %	Annual Growth in Value (2022-2023) %	Unit value (USD/unit)
1.	China	49	9,581	69%	33%	27%	-13%	5,068
2.	Germany	6	827	8%	-2%	-6%	17%	6,779
3.	Italy	5	1,023	7%	18%	10%	24%	4,526
4.	France	3	205	5%	15%	8%	37%	15,878



Source: ITC (Trade Map)

To explore the market access conditions in Netherlands as: [Market Access Map \(macmap.org\)](https://macmap.org) There, you can find comprehensive information about the market entry requirements and regulations in Netherlands.

Conclusion

- The global demand for Prepared or Preserved Poultry Meat Products under HS code 160239 reached \$685 million USD, with an annual growth rate of 7% in value and a volume grew at a slower rate of 4%, between 2019 and 2023. In 2023, Egypt's exports in the broader meat preparations sector totaled \$8 million USD and 1,500 tons, with \$5 million USD and 931 tons specifically under HS code 160239.
- Key **importing markets** for this product include Germany, Saudi Arabia, the UK, the Netherlands, Spain, and Japan (7%) collectively accounting for 56% of global imports. Germany alone represents 15%, followed by Saudi Arabia at 11%, the UK and the Netherlands at 8% each, and Spain, Japan at 7%. **The top exporters** are China (27%), Thailand (14%), Malaysia (12%), Netherlands (8%), and Spain (8%) collectively making up 69% of global exports.
- The Netherlands, in particular, stands out as both the fourth-largest importer and exporter in 2023, highlighting its significant role in the global trade of this product. This dual role underscores the Netherlands' importance in the international market for preserved meat products.

Conclusion **following**

- According to the Export Potential Map, the markets with greatest potential for Egypt's exports of 160239 Meat/offal of ducks, prepared/preserved, n.e.s. are United Kingdom and Netherlands. United Kingdom shows the largest absolute difference between potential and actual exports in value terms, leaving room to realize additional exports worth \$1.8 mn.
- The UK, holding 8.3% of global imports, ranks third in the world for HS code 160239. From 2019 to 2023, it saw a 6% increase in value and a 2% decline in volume. The leading exporters to the UK are China (36%) and Thailand (35%), with an average unit import value of \$7,306 USD.
- In the Netherlands, holding 8% and ranked 4th. The market has grown in value by 10% and in volume by 6% from 2019 to 2023. The top exporters to the Netherlands are China (78%), Thailand (7%), and Germany (5%), with an average unit import value of \$4,870 USD.

Recommendation

1. Addressing the European Ban on Meat Imports

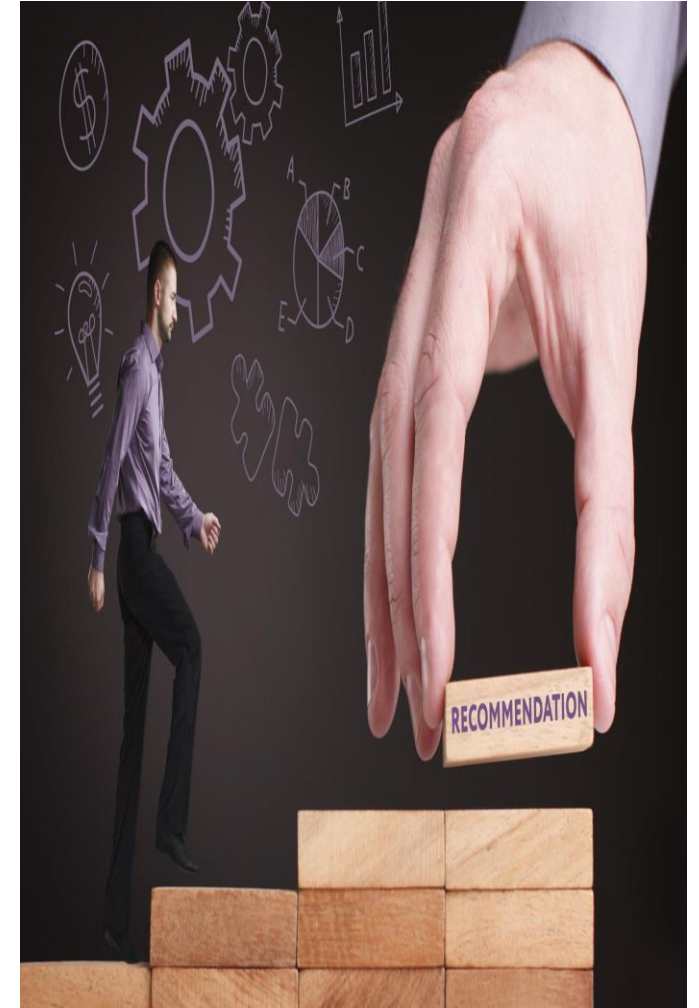
- **Engage with Relevant Authorities:** Establish close collaboration with the Egyptian Veterinary Quarantine and the National Food Safety Authority to ensure compliance with European standards.
- **Compliance with Standards:** Work towards lifting the European ban by improving production practices, enhancing quality control measures, and meeting safety and health regulations.
- **Documentation Submission:** Promptly submit required documentation and evidence of compliance to European authorities.

2. Removing Egypt from the OIE Blacklist

- Work closely with international veterinary bodies to address concerns and meet all requirements for delisting Egypt from the OIE (World Organisation for Animal Health) blacklist.

3. Streamlining Internal Procedures

- **Establish a Centralized Regulatory Entity:** Allocate a specialized entity within the Ministry of Agriculture to streamline veterinary and regulatory processes for export.



Recommendation **following**

4. Strengthening Government Support for Exports

- Support for International Exhibitions: Increase government funding and support for participation in international trade fairs, particularly in target export markets.
- Export Subsidy Payments: Ensure timely and consistent disbursement of export subsidies to incentivize and support exporting companies.

Enhancing Financial Mechanisms

- Export Value Guarantees: Develop mechanisms through national banks to guarantee export values, particularly for African markets, to minimize financial risk.
- Foreign Currency Transactions: Lift restrictions on receiving and depositing foreign currency for exporting companies to facilitate smooth transactions.

6. Developing Logistics and Infrastructure

- Modernize the Naval Fleet: Invest in the development of Egypt's naval fleet, focusing on enhancing shipping capabilities to African ports.
- Improve Technological Infrastructure: Encourage investment in modern production technology and export logistics by offering exemptions from customs, taxes, and fees.

7. Building Strategic Partnerships

- Collaborate with international organizations, industry stakeholders, and logistics providers to further expand Egypt's access to global markets.

References

- **GOEIC** General Organization for Export and Import Control (GOEIC)
- **ITC** (International Trade Centre)
- **Trade Map**
- **Market Access Map**
- **Export Potential Map**
- **Mordor Intelligence**
- **Statista**
- **FAO**
- [Production of meat worldwide by meat type 2024 | Statista](#)
- [Meat and Dairy Production - Our World in Data](#)
- [Kuwait bans import of meat and eggs | arabtimes](#)

Appendix

[Egypt Prepared or Preserved Poultry Meat Report Attachments - Google Drive](#)

FEC Market Intelligence Unit :

For more details, please check our website:

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