

COUNTRY MARKET STUDY: SAUDI ARABIA



***Sub-directorate: Europe, Russia and Middle East
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SUMMARY¹

This country market study of Saudi Arabia examines the trade flows between South Africa (SA) and Saudi Arabia. The major objective of the study is to identify agricultural products that have the potential to be exported to Saudi Arabia. First the study gives a historical background about Saudi Arabia, looks at some country facts, give an economic overview and look at the regional and international relations of Saudi Arabia. Then it examines the trade policy of Saudi Arabia, looks at bilateral agreements between SA and Saudi Arabia and at total trade between these two countries. From here on there is focused on agricultural trade, inter alia taking into account the following: the most important products imported and exported and the trade balance. An analysis is done to determine possible exports to Saudi Arabia. Finally it looks at some trade barriers and a conclusion and some comments are made on trade with Saudi Arabia.

The Kingdom of Saudi Arabia (Saudi Arabia) is a Middle Eastern Country, occupying about 80 percent of the Arabian Peninsula. The economy of Saudi Arabia is oil-based and there is strong government controls over major economic activities. It possesses more than 20% of the world's proven petroleum reserves and ranks as the largest exporter of petroleum in the world. Saudi Arabia is a member of the Gulf Co-operation Council (GCC) and a leading member of Organisation of the Petroleum Exporters Countries (OPEC).

More than half of Saudi Arabia's GDP is managed by the government. Mineral products constitute about 90% of Saudi Arabia's exports and foodstuffs are about 14% of Saudi Arabia's total imports. The hot, harsh weather and limited water supply of Saudi Arabia, results in the climate not being suitable for agriculture.

Exports of agricultural products from SA to Saudi Arabia were R 523.1 million in 2008, while imports of agricultural products were R 26.5 million. Edible fruits, cigarettes and chocolate were the major agricultural exports, while waters and dates were the major agricultural imports (the import of waters was small in 2009).

A trade potential index (TPI) was drawn up and it was noted that there are opportunities for deepening trade with Saudi Arabia. The "trade chilling" analysis was also done. The results are in Table 12 and 13, respectively.

The market for certain product groupings in Saudi Arabia were analyzed and include inter alia some citrus; food preparations; cigarettes; sauces and preparations, tomato sauces; juices; maize; preparations for infant use; milk and milk powder; frozen boneless bovine cuts; maize seeds; refined sugar and chocolates.

It is noted that tariffs for SA's exports to Saudi Arabia are relative low and there was a further decrease in some tariffs in June 2009.

Finally, we look at the trade barriers, as well as the trade related infrastructure, conclusion and some comments are made.

1 Acknowledgements: Various sources were used during the composition of this document, which are acknowledged under paragraph headings, footnotes or in the text.

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1. INTRODUCTION

1.1 Historical background ^{2 3}

In 1744 Mohammed bin Abdel-Wahhab sought refuge with Mohammed bin Saud, the ruler of the small city in the Nejd (central Arabia). Together they embarked on campaigns across Arabia to control a wider area of Arabia and the practice of "Wahhabism" (a conservative interpretation of the Sunni Islam religion) in the region. This "Wahhabism" remains an important legitimising tool of the Saudi royal family.

In November 1964 Prince Faisal bin Abdulaziz became King of Saudi Arabia. In 1975 King Faisal was assassinated and this led to the reign of King Khaled bin Abdulaziz Al-Saud. The death of King Khaled in 1982 led to the accession of King Fahd. King Fahd undertook a number of political initiatives designed to strengthen himself and the kingdom as the leading player in the Arab and Islamic world. These included a Middle East peace plan in 1981, which served as the precursor in 1989 of the Taif Agreement, which ended the civil war in Lebanon. The pivotal role afforded by Saudi Arabia's responsibility for Mecca and Medina was embodied in King Fahd's declaration of himself as the Custodian of the Two Holy Places and the founding under Saudi auspices of the World Muslim League. King Fahd died in August 2005.

The current Head of State and Head of Government is the monarch, known officially as the Custodian of the Two Holy Mosques, King and Prime Minister Abdullah bin Abdulaziz Al Saud. He has been the ruler since 1 August 2005. The heir apparent is Prince Sultan bin Abdulaziz Al Saud, the half brother of King Abdullah and the second deputy prime minister is Prince Nayef, appointed in March 2009.

Saudis consider the Quran, the hadith (sayings) and Sunni (tradition) of the Prophet Mohammed as their country's constitution. In 1992, King Fahd became the first Saudi monarch to compile these regulations into a single document called the main code (*nizam*) or the Basic Law of Government. Promulgated as a royal decree, this document is the nearest approximation to a written constitution. Although the main code is not a formal constitution, it fulfills some of the same purposes of such a document. However, the main code lacks any explicit clause guaranteeing the basic rights of citizens to freedom of belief, expression, assembly or political participation. Capital punishment exists and execution is by public decapitation. Political parties are not allowed in Saudi Arabia.

The cabinet is known as the Council of Ministers and is appointed by the King every 4 years. Many royal family members serve within the Council of Ministers. Recently in February 2009, King Abdullah took the unusual step of reshuffling the cabinet. King Abdullah has wrested control of the Saudi justice and education systems away from the most conservatives and bestowed them to reformers.

The parliament is known as the Majilis al Shoura or The Consultative Council. It serves as an advisory body and the 150 Council members are appointed by the King for a four-year term.

² Country Profile. Department of Foreign Affairs - April 2009

³ Saudi Arabia: Country Profile - Main report: October 1st 2007. Euromonitor

1.2

Country facts^{4 5 6}

- The Kingdom of Saudi Arabia (Saudi Arabia) is a Middle Eastern Country, occupying about 80 percent of the Arabian Peninsula. It is a closed, absolute monarchy dominated by the Al-Saud ruling family.
- Land area of 2.15 million square kilometers. It has a total of 4 431 kilometers of borders with Yemen, Iraq, Jordan, Oman, the United Arab Emirates, Kuwait and Qatar. Saudi Arabia is locked between the Persian Gulf and the Red Sea and is mostly a desert.
- The capital is Riyadh and other major cities are: Mecca, Eastern, Asir and Medina.
- The estimated population is 24.8 million (2008). 60 % of the population is reckoned to be less than 20 years old and 70 % is under 30 years old.
- Language is Arabic.
- Religion Islamic.
- Average life expectancy - males: 71 years; females: 75 years.
- Adult literacy rate: 85 %.
- Currency: Saudi Riyal (pecked to the US\$ at SR 3.745: US\$ 1). It is expected that the a Gulf Monetary Union may be formed in 2010, which will serve as a basis for the eventual central bank of the Persian Gulf that may lead to a single currency for the region.⁷
- The Islamic calendar is used to date religious occasions such as Ramadan, and the Umm-al-Qura calendar for administrative purposes and daily government business.⁸ The weekend is Thursdays and Fridays. The month of Ramadan is not a public holiday, but the working day is substantially reduced in this month.
- The climate is very hot during the day, but the temperature can drop below freezing at night. The winds produce sandstorms that can decrease visibility to a few meters. The driest months are July, September and October with 0 mm average rainfall. The wettest month is April with 25 mm average rainfall.

1.3

Economic overview^{9 10 11}

The economy of Saudi Arabia is oil-based and there is strong government controls over major economic activities. It possesses more than 20 % of the world's petroleum reserves and ranks as the largest exporter of petroleum in the world. The petroleum sector accounts for roughly 80 % of budget revenues, 45 % of GDP and 90 % of export earnings.

The GDP of Saudi Arabia was US\$ 468 800 million in 2008. GDP growth was 4.2 % in 2008 compared to 3.5 % in 2007. Graph 1 indicates the composition of the GDP and table 1 indicates that the GDP per capita (PPP) of Saudi Arabia was the third highest of the comparative countries. About 40 % of Saudi Arabia's GDP comes from the private sector.

4 Country Profile: Saudi Arabia, September 2006. Library of Congress – Federal Research Division

5 Country Profile Saudi Arabia / The Guardian – 24 April 2009

6 Saudi Arabia: Country Profile. 26 Jun 2009 Euromonitor

7 <http://www.newnations.com/headlines/sa.php#top> Update No: 030 - (21/12/09)

8 Glassé, Cyril (2001). The New Encyclopedia of Islam, pp. 98-99. Rowman Altamira.

9 Saudi Arabia: Country Profile. 26 Jun 2009 Euromonitor

10 Country Profile: Saudi Arabia, September 2006. Library of Congress – Federal Research Division

11 <https://www.cia.gov/library/publications/the-world-factbook>

Graph 1: Composition of Gross Domestic Product in 2008

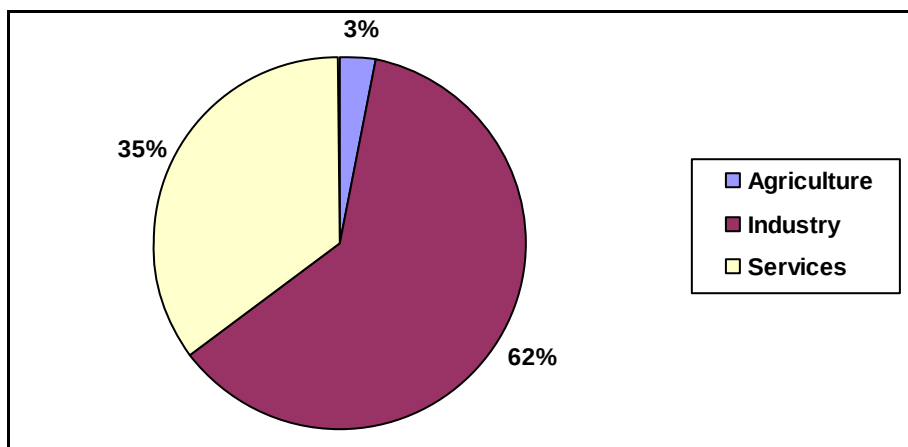


Table 1: Comparative economic indicators, 2008 ^{12 13}

	Egypt	Iran	Kuwait	Saudi Arabia	South Africa	UAE
Inflation (%)	18.3	25.5	10.6	9.9	9.9	12.3
GDP (Million Int. \$ at PPP)	443 373	805 365	137 528	592 918	493 470	178 868
Total GDP (Million US \$)	165 025	340 397	158 077	468 800	276 445	253 070
Population (Mid year - Million)	76.1	73.8	2.4	25.5	49.9	4.6
GDP per Capita (PPP Int. \$)	5 829	10 920	56 879	23 288	9 891	39 232
GDP per Capita (\$)	2 170	4 615	65 377	18 412	5 541	55 507
Exports (Million US \$)	26 246	104 498	87 463	328 930	84 637	231 550
Imports (Million US \$)	48 775	57 230	24 874	115 133	99 480	158 900

Saudi Arabia has a robust economy, but remains largely dependent on the production and exportation of oil. It produces more oil and natural gas liquids than any other country in the world but faces the challenge of diversifying its economy. The government is encouraging private sector growth - especially in power generation, telecommunications, natural gas exploration and petrochemicals - to lessen the Kingdom's dependence on oil exports.

Table 2 gives some main economic indicators for the period between the years 2003 and 2008.

Table 2 Main economic indicators (2008)

	2003	2004	2005	2006	2007	2008
Inflation (% change)	0.6	0.3	0.7	2.2	4.2	9.9
Exchange rate (per US\$)	3.75	3.75	3.75	3.75	3.75	3.75
GDP (% real growth)	7.7	5.3	5.6	3.0	3.5	4.2

The high oil prices have given the Kingdom ample financial reserves to manage the impact of the global financial crisis, but tight international credit, falling oil prices, and the global economic slowdown will reduce Saudi economic growth in 2009.

¹² Euromonitor. www.portal.euromonitor.com

¹³ In the comparison take into account that oil prices was high in 2008

The swelling Saudi population, of which nearly 40 % are youths under 15 years old, will lead to a need for creating a significant numbers of new jobs and this may lead to discontent, if the job opportunities are not created. About one-third of the population in the 15-64 age groups is non-national and these foreign workers play an important role in the Saudi economy, especially in the oil and service sectors. There is high unemployment (in 2007 the official unemployment rate among Saudi nationals were 11.9%) and this young population generally lacks the education and technical skills the private sector needs. The high oil prices through mid-2008 have allowed the Saudi government to substantially boost spending on job training and education, boost growth, government revenues and Saudi ownership of foreign assets, while paying down domestic debt.

Except for oil Saudi Arabia also has significant deposits of gold, silver, copper, zinc, bauxite, magnesite and phosphates.

The dry climate of Saudi Arabia severely limits its agricultural potential. About 2% of the land is cultivated, although up to 39 % is used for low-level grazing.

2. TRADE RELATIONS

2.1 Trade policy^{14 15 16 17}

From the oil boom of the 1970's, Saudi Arabia has sought to stimulate public consumption and welfare, in an attempt to satisfy domestic lobbies. This was done by holding down taxes, subsidizing goods and services, maintaining a high level of public-sector employment and salaries, and spending freely on infrastructure projects, military hardware and other purchases. The policy of pegging the Saudi Riyal to the US dollar since 1986, has limited the risk of exchange-rate and interest-rate instability that might have arisen due to variations in the oil price or government spending policies.

Saudi Arabia seeks to diversify the economy base and attract private and foreign investment as a way of providing job opportunities for citizens and maintaining living standards even in the event of a fall in oil reserves. The government is keen to develop industries that can take advantage of the Kingdom's natural resources.

Table 4: Current account of Saudi Arabia (US\$ m)

	2004	2005	2006	2007	2008
Trade balance	84 948	126 117	147 391	151 547	201 525
Goods: exports fob	125 998	180 712	211 305	234 145	309 784
Goods: imports fob	-41 050	-54 595	-63 914	-82 598	-108 259
Services balance	-5 205	-7 843	-12 093	-22 897	-26 320
Income balance	478	1	642	238	-3 188
Current transfers balance	-26 878	-26 804	-35 030	-32 118	-43 987
Current-account balance	53 343	91 471	100 910	96 770	128 030

Table 4 indicates the current account of Saudi Arabia.

Graph 2 indicates that mineral products constitute about 90 % of Saudi Arabia's exports. Over half of Saudi Arabia's GDP is managed by the government (given its dominance of the oil sector

14 Briefing document: Kingdom of Saudi Arabia. SA / KSA JEC, 19 – 23 February 2009, DTI

15 Country Report:: Saudi Arabia - June 2009. The Economist Intelligence Unit. www.eiu.com

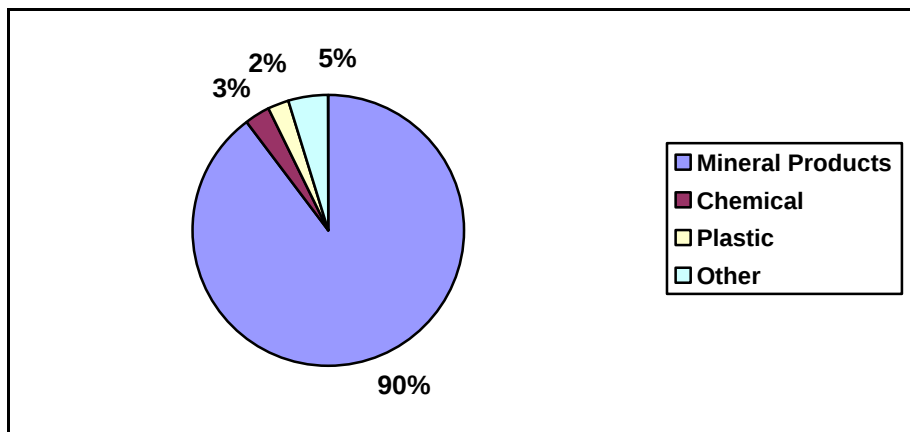
16 Doing Business 2009. World Bank

17 Country Forecast: Saudi Arabia – July 2009. The Economist Intelligence Unit. www.eiu.com

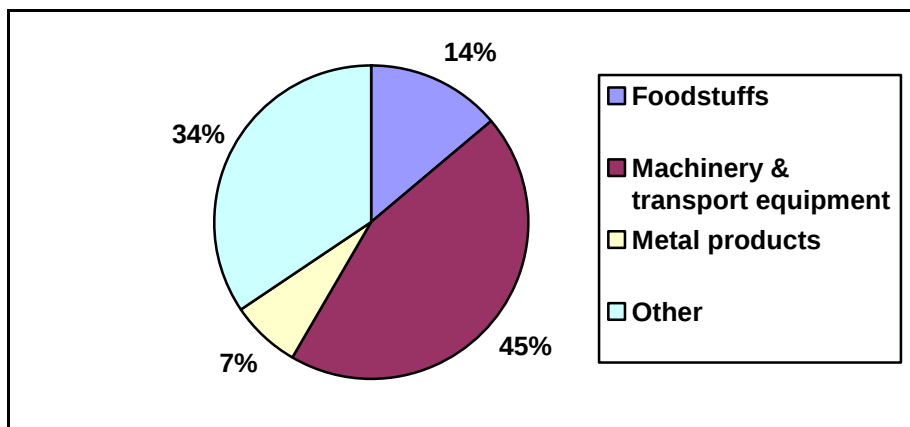
and the large size of a number of non-oil state and parastatal companies). Graph 3 indicates that foodstuffs are about 14 % of Saudi Arabia's total imports.

Graph 4 indicates the main export destinations for the exports of Saudi Arabia's products in 2008 while graph 5 indicates the major countries from which Saudi Arabia has imported from in 2008.

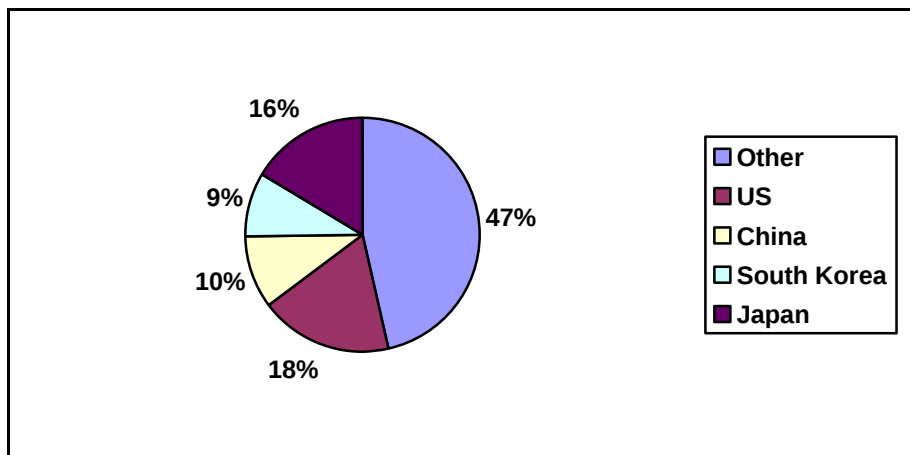
Graph 2: Major Saudi Arabia's exports to the world in 2008 (% Share)



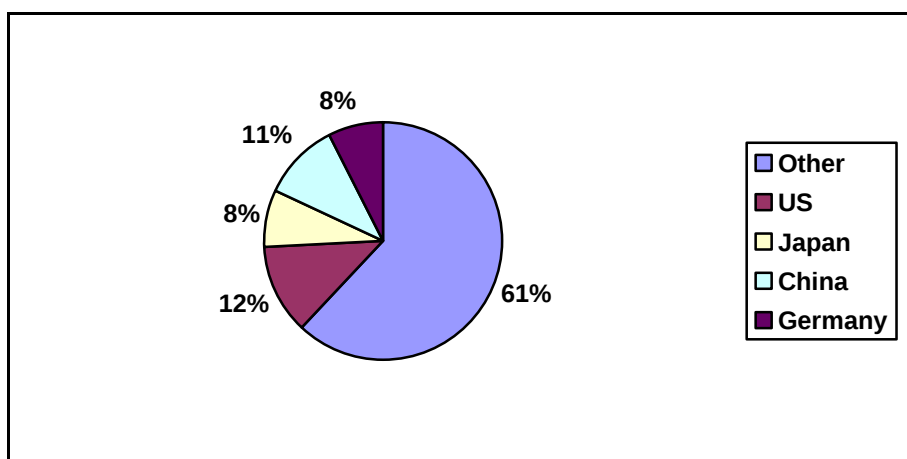
Graph 3: Major Saudi Arabia's imports from the world in 2008 (% Share)



Graph 4: Main Saudi Arabia's export destinations (% Share 2008)



Graph 5: Main origin of Saudi Arabia's imports (% Share 2008)



Each year a study called "Doing Business" is done by the World Bank where business regulations in various countries are compared. Under the heading trading across borders trade is compared and in 2009 Saudi Arabia was ranked number 16 compared to number 33 the previous year. (This is out a total of 181 countries - South Africa was 148th on the list). It is thus clear that Saudi Arabia works towards being competitive in trade.

2.2 Total Trade between South Africa and Saudi Arabia ¹⁸

Table 5 indicates that products to the value of R 2 774 million were exported by South Africa to Saudi Arabia in 2008. There was an increasing trend in the exports to Saudi Arabia over the past 5 years. The value of imports from Saudi Arabia was R 45 954.2 million in 2008, according to table 6. There was a large increase in the value of imports, mainly due to the increase of oil imports in 2008, which constituted more than 87 % of imports in 2008. Table 7 indicates that South Africa has a trade deficit with Saudi Arabia, which has increased sharply in 2008 due to higher international oil prices.

Table 5: Top 10 - South Africa's exports to Saudi Arabia (Million R)

HS Code	Product description	2004	2005	2006	2007	2008
Total	Saudi Arabia	1 439.3	1 915.9	1 993.4	2 367.0	2 774.0
72	Iron And Steel	540.0	783.1	440.2	963.1	619.0
76	Aluminum	47.5	119.7	137.7	105.1	362.4
08	Edible Fruit And Nuts	258.9	231.1	304.1	282.7	332.8
26	Ores, Slag, Ash	0.8	0.7	11.8	2.3	317.1
87	Vehicles, Not Railway	4.0	3.8	147.7	257.8	163.4
48	Paper, Paperboard	59.5	28.6	64.7	77.9	101.3
85	Electrical Machinery	15.7	20.1	58.8	32.3	95.6
84	Machinery	32.2	52.4	39.5	84.2	85.6
18	Cocoa	47.5	59.6	77.4	57.4	84.8
24	Tobacco	0.0	0.0	0.0	54.1	70.5

Table 6: Top 10 - South Africa's imports from Saudi Arabia (Million R)

HS Code	Product description	2004	2005	2006	2007	2008
Total	Saudi Arabia	17 076.8	19 397.0	24 539.2	25 378.4	45 954.1
27	Mineral Fuel, Oil Etc	15 505.1	17 711.9	22 571.5	22 782.3	40 156.2
29	Organic Chemicals	550.6	715.5	663.1	710.6	1585.9
31	Fertilizers	485.2	315.0	458.0	798.4	1431.5
28	Inorg Chem; Rare Erth Mt	131.7	223.8	147.7	268.0	818.3
88	Aircraft, Spacecraft	0.1	0.1	2.4	0.0	809.6
39	Plastic	342.8	354.6	478.4	608.4	550.1
25	Salt; Sulfur; Earth, Stone	0.3	18.8	16.5	52.6	257.3
38	Misc. Chemical Products	0.0	0.0	0.1	14.6	193.3
84	Machinery	3.8	2.8	2.6	4.0	43.0
70	Glass And Glassware	19.5	3.7	14.8	40.6	33.8

Table 7: Total Trade balance between South Africa and Saudi Arabia (Million R)

	2004	2005	2006	2007	2008
Total value of SA's imports from Saudi Arabia SA	17 076.8	19 397.0	24 539.2	25 378.4	45 954.1
Total value of SA's exports to Saudi Arabia	1 439.3	1 915.9	1 993.4	2 367.0	2 774.0
Trade deficit by SA	15 637.4	17 481.1	22 545.8	23 011.4	43 180.1

3. AGRICULTURE

3.1 Profile^{19 20}

The hot, harsh weather and limited water supply of Saudi Arabia, results in the climate not being suitable for agriculture. Only about 2% of the land is cultivated. In the 80's, the Saudi government has started to upgrade the country's agriculture sector to a development priority in order to reduce dependency on imported food, as well as a means of diversifying the economy away from its strong reliance on the oil and gas sector.

Government support to agriculture has since become less as officials questioned the use of the Saudi Arabia's limited water resources. By reducing the buying price of wheat, the government is trying to phase out wheat production by 2016, as the irrigation requirements of the harvest are placing severe strain on water resources. Production will rather focus more on higher value crops like fruits and vegetables. The dairy sector may be an exception to the reduction trend. Meat, fish and poultry outputs have grown slowly.

The new thinking is to invest in developing farmland abroad instead. Saudi Arabia has indicated that they might be interested to invest in South African farms²¹

Saudi Arabia like most other countries in the region cannot meet the growing population's food needs and is therefore reliant on food imports. An amount of about US\$ 8 billion worth of live animals and foods are imported annually.

¹⁹ Country Profile - 2008. Saudi Arabia. The Economist Intelligence Unit

²⁰ Potential for GCC Agro-investments in Africa and Central Asia GRC Report September 2008

²¹ BTOR: Intergovernmental Meeting between DoA and DFA (Gulf States) – 3 September 2008

3.2 Forecast of consumer expenditure²²

Table 8 gives a forecast of consumer expenditure on food, beverages and tobacco in Saudi Arabia. As there is a relative high population growth, expenditure on food, beverages and tobacco increase. Per capita consumption of fruit increases, while per capita consumption of meat and vegetables are more or less on the same level.

Table 8: Forecast of consumer expenditure on food, beverages and tobacco in Saudi Arabia (2009 - 2013)

	2005 *	2006 *	2007 +	2008 +	2009 -	2010 -	2011 -	2012 -	2013 -
Population (million)	23.1	23.7	24.2	24.9	25.5	26.2	26.8	27.5	28.2
Meat consumption (kg/pc)	53	53	53	53	52	52	52	52	52
Vegetable Consumption (kg/pc)	117	117	117	117	116	116	117	117	118
Fruit Consumption (kg/pc)	98	100	101	103	104	105	105	105	105
Consumer expenditure on food, beverages and tobacco (US \$ million)	21 716	24 640	29 225	33 390	35 877	38 244	40 808	43 425	46 379

Actual *, Estimate +, Forecast -.

Source: Economic Intelligence Unit Forecast: Data Tools

3.3 Agricultural trade between South Africa and Saudi Arabia ²³

Table 9 indicates the top 10 exports of agricultural products by SA to Saudi Arabia in 2008 (Annex 1 indicate the exports of all agricultural products by SA to Saudi Arabia in 2008). It is noted that citrus, cigarettes, chocolate, grapes, apples and plums had the highest export value in 2008. The total value of agricultural exports in 2008 was R 523.1 million.

Table 10 indicates that the total value of agricultural imports by South Africa from Saudi Arabia was R 26.5 million in 2008 of which waters are the major product (in 2009 the import of waters had a much lower value).

Table 11 indicates that South Africa has had a surplus in agricultural trade with Saudi Arabia over the period. The surplus was R496.6 million in 2008.

Table 9: Top 10 - South Africa's exports of agricultural products to Saudi Arabia (Million R)

HS Code	Description	2004	2005	2006	2007	2008
Total	WTO Agric Products at HS 6 digit	442.2	382.9	500.1	448.3	523.1
080510	Oranges, Fresh	133.9	118.2	179.9	142.8	189.4
240220	Cigarettes Containing Tobacco	0.0	0.0	0.0	54.1	70.5
080550	Lemons And Limes, Fresh Or Dried	50.3	46.7	62.4	61.9	54.8
180631	Chocolate & Othr Cocoa Preps, Not Bulk, Filled	0.0	0.0	4.3	0.0	44.5
180620	Chocolate Prep Nesoi, In Blocks Etc. Over 2 Kg	34.2	59.6	73.0	57.4	37.6
080610	Grapes, Fresh	13.8	17.2	18.3	21.6	22.7
080810	Apples, Fresh	23.7	18.8	16.5	20.7	21.6
080520	Mandarins (Inc Tanger Etc) & Citrus Hybr Fr Or Dri	18.1	11.4	10.6	12.7	15.6
080940	Plums, Prune Plums And Sloes, Fresh	6.7	7.2	5.7	10.6	11.7
210390	Sauces Etc. Mixed Condiments And Seasonings Nesoi	0.1	0.2	0.3	1.0	5.6

Table 10: Top 10 - South Africa's imports of agricultural products from Saudi Arabia (Million R)

HS Code	Description	2004	2005	2006	2007	2008
Total	WTO Agric Products at HS 6 digit	15.3	21.8	29.4	40.2	26.5
220210	Waters, Incl Mineral & Aerated, Sweetnd Or Flavord	0.0	0.0	6.3	22.6	18.8
080410	Dates, Fresh Or Dried	1.0	0.9	2.3	2.7	3.0
190190	Malt Extract; Flour, Meal, Milk Etc Prod Etc Nesoi	1.0	1.0	1.1	1.4	1.5
410390	Raw Hides And Skins Nesoi, Fresh Or Salted Etc.	0.0	0.6	0.5	3.5	1.2
190531	Cookies (Sweet Biscuits)	0.1	0.2	0.8	0.6	1.0
200540	Peas (Pisum Sativum) Prep/Pres Nesoi, Not Frozen	0.0	0.0	0.0	0.0	0.2
120991	Vegetable Seeds For Sowing	0.0	0.0	0.0	0.0	0.2
190219	Pasta, Uncooked, Not Stuffed Etc., Nesoi	0.1	0.0	0.0	0.0	0.1
170490	Sugar Confection (Incl Wh Choc), No Cocoa, Nesoi	0.1	0.0	0.1	0.0	0.1
200980	Juice Of Any Single Fruit/Vegtble Unfermentd	0.0	0.0	0.1	0.0	0.1

	Nesoi					
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Table 11: Trade balance in agricultural products between South Africa and Saudi Arabia (Million R)

	2004	2005	2006	2007	2008
Total value of SA's Agricultural exports to Saudi Arabia	442.2	382.9	500.1	448.3	523.1
Total value of SA's Agricultural imports from Saudi Arabia	15.3	21.8	29.4	40.2	26.5
Surplus	426.9	361.1	470.7	408.1	496.6

3.4 Analysis to determine possible agricultural exports to Saudi Arabia

The methods that were used to determine which products have the potential to be exported from South Africa to Saudi Arabia are the trade potential index (TPI) and the "trade chilling concept". The TPI concentrates on products that are already traded between countries (trade deepening), while "trade chilling" concentrates on products that are not currently traded between countries, but have the potential to be traded (trade widening). Point 3.4.1 discusses the TPI, point 3.4.2 "trade chilling" and point 3.4.3 some of the products identified by using these methods.

3.4.1 Trade potential index (TPI) ²⁴

The Trade Potential Index uses a scoring system based on data obtained from the Trade Map database to determine which products have the potential to be exported to a country. The trade indicators contained in the database used were: SA exports to Saudi, growth in SA exports to Saudi, growth of Saudi imports from world, growth of SA export to world and the size of the indicative potential trade. The TPI concentrates on products that are already traded between countries (trade deepening). The TPI is measured against a potential score of 5. A score of 0 would represent the lowest end of the scale and the least trade potential whilst a score of 5 would indicate the greatest trade potential. Annex 2 gives a more comprehensive description of the TPI.

Table 12 indicates the top 20 product tariff lines according to the TPI. In the ranking of importance (from most important to least important) the TPI has been used as the most important criteria, followed by the indicative trade potential (ITP), in US\$ thousand as the second most important criteria. The TPI indicates the following as the top 10 products to export to Saudi Arabia: Oranges (080510), Food preparations (210690), Cigarettes (240220), Sauces and preparations (210390), Mixtures of juices (200990), Fruit & veg. juice (200980), Fresh or dried lemons 080550), Fresh grapes (080610), Mandarins & clementine's (080520) and Pears & quinces (080820). Based on the top 10 products in the TPI, there is the possibility that SA can increase its exports to Saudi Arabia by US\$ 1 215 million. ²⁵

Table 12 also indicates the products which Saudi Arabia imports from the world and those that SA exports to the world. This gives an indication of export opportunities. It must be noted that Annex 3 give a TPI for all agricultural products.

²⁴ Trade Map - www.trademap.org

²⁵ Imports from the World by Saudi Arabia minus exports by SA to Saudi Arabia. It is assumed that SA can produce enough to supply the market

Table 12: Trade Potential Index (TPI), existing and potential trade (Indicative Trade Potential - ITP) between South Africa and Saudi Arabia (US\$ '000)

HS Code	Product Description	SA Exports to Saudi (2007)	Saudi Imports from the World (2007)	SA Exports to World (2007)	ITP (2007)	Final TPI Score *	Does SA export to Saudi in 2007?	Is SA export to Saudi growing ? AVG /year 03-07	Is Saudi Imports from World growing ? AVG /year 03-07	Is SA export to World growing ? AVG /year 03-07	Is indicative potential trade > US\$ 200 000 in 2007 ?
'080510	Oranges, fresh or dried	20 325	117 582	390 870	97 257	5	1	1	1	1	1
'210690	Food preparations nes	59	444 800	69 732	69 673	5	1	1	1	1	1
'240220	Cigarettes containing tobacco	7 691	472 681	69 826	62 135	5	1	1	1	1	1
'210390	Sauces and preparations nes and mixed condiments and mixed seasonings	139	46 165	24 917	24 778	5	1	1	1	1	1
'200990	Mixtures of juices unfermentd¬ spiritd whether o not sugard o sweet	50	42 233	22 659	22 609	5	1	1	1	1	1
'200980	Fruit&veg juice nes (exc mx) unferment unspiritd,whether/not sug/sweet	71	64 079	21 248	21 177	5	1	1	1	1	1
'080550	Fresh or dried lemons "Citrus limon, Citrus limonum" and limes "Citrus	8 804	25 066	54 481	16 262	5	1	1	1	1	1
'080610	Grapes, fresh	3 074	18 808	313 140	15 734	5	1	1	1	1	1
'080520	Mandarins(tang&sats)clem en tines&wilkg&sim citrus hybrids,fresh/drid	1 813	14 912	60 488	13 099	5	1	1	1	1	1
'080820	Pears and quinces, fresh	182	10 968	118 388	10 786	5	1	1	1	1	1
'091099	Spices nes	10	21 231	5 880	5 870	5	1	1	1	1	1
'200949	Pineapple juice, unfermented, Brix value > t	9	5 060	12 527	5 051	5	1	1	1	1	1

	20 at 20°C, whether or not										
'080940	Plums and sloes, fresh	1 514	6 422	35 824	4 908	5	1	1	1	1	
'180620	Chocolate&other food preparations containg cocoa weighg more than 2 kg	8 165	66 791	10 981	2 816	5	1	1	1	1	1
'010619	Live mammals (excl. primates, whales, dolphins and purpoises "mammals	274	36 270	2 048	1 774	5	1	1	1	1	1
'160232	Fowl (gallus domesticus) meat, prepared/preserved	5 382	11 888	7 056	1 674	5	1	1	1	1	1
'080410	Dates, fresh or dried	2	893	4 452	891	5	1	1	1	1	1
'200929	Grapefruit juice, unfermented, Brix value > 20 at 20°C, whether or not	87	839	21 702	752	5	1	1	1	1	1
'190490	Cereals,exc maize (corn),in grain form,pre-cookd or otherwise preparad	7	730	3 406	723	5	1	1	1	1	1
'080440	Avocados, fresh or dried	33	679	27 847	646	5	1	1	1	1	1

* Where there were no exports in a year, but there were exports in later years, the years of no exports were ignored.

3.4.2 "Trade chilling concept"²⁶

The Trade chilling concept is a method used to indicate which products have the highest potential to be traded between countries, if current trade flows are excluded. Because current trade flows are excluded, this refers to trade widening, rather than to trade deepening as in the TPI. Annex 4 gives a more comprehensive description of the Trade chilling concept, from which this section was written.

The trade chilling concept refers to products which Saudi Arabia and South Africa are trading with the rest of the world, but not with each other. The trade chilling took the following into consideration: (i) global exports from South Africa in 2007 which were at least \$3 million and (ii) global imports into Saudi Arabia in 2007 were also at least \$3 million (iii) where product trade between Saudi Arabia and South Africa were less than US\$15 000 in 2007 no trade is assumed.

Table 13 indicates the agricultural products which Saudi Arabia and South Africa are trading with the rest of the world, but not with each other (trade chilling²⁷). It is noted that maize (100590), preparations for infant use (HS 190110), unsweetened milk and cream powder exceeding 1.5 % fat (040221), milk powder not exceeding 1.5 % fat (040210), frozen boneless bovine cuts (020230), sweetened milk and cream (040299), cheese (040690), refined sugar in solid form (170199), communion wafers, empty cachets for pharmaceutical use & similar products & bakers' wares (190590) and coffee not roasted or decaffeinated (090111) are the top 10 products identified for potential export. Based on the top 10 products identified by the trade chilling, there is a potential to increase exports by SA to Saudi Arabia by US\$ 1 789 million.²⁸ All the products identified in the "trade chilling" exercise can however be considered for potential exports. Under tariff structure (point 3.5) it is noted that Saudi Arabia's applied tariffs to SA are relative low (+5%). It is thus important to note that the reason for non trade in products identified by the trade chilling is not tariffs.

26 This section was adapted from a contribution by: Bonani Nyhodo. Senior Economist - Supply Chain/Trade. National Agricultural Marketing Council - Republic of South Africa. The original contribution can be seen in Annex 3

27 The authors of this report are of the opinion that some of the products identified by the trade chilling, may be disturbed by the functioning of SA as a trade hub for exports to Africa (e.g. coffee, milk products). It is however still a good indicator of products for potential export..

28 Imports from the World by Saudi Arabia minus exports by SA to Saudi Arabia. It is assumed that SA can produce enough to supply the market

Table 13: Summary of Agricultural Products in which Saudi Arabia (Saudi) and South Africa (SA) are trading with the rest of the world, but not with each other (Trade chilling). (2007 - US\$ '000)

Product code	Product label	Saudi Arabia's imports from world	South Africa's exports to world	Saudi Arabia's imports from SA	South Africa's exports to Saudi Arabia
		Value in 2007	Value in 2007	Value in 2007	Value in 2007
'100590	Maize (corn) nes	461 410	15 808	0	0
'190110	Prep of cereals,flour,starch/milk f infant use,put up f retail sale	231 953	8 893	0	0
'040221	Milk and cream powder unsweetened exceeding 1.5% fat	226 424	3 233	0	0
'040210	Milk powder not exceeding 1.5% fat	188 635	4 620	0	0
'020230	Bovine cuts boneless, frozen	144 898	3 507	0	0
'040299	Milk and cream nes sweetened	135 030	3 986	0	0
'040690	Cheese nes	128 752	3 373	0	0
'170199	Refined sugar, in solid form, nes	113 654	74 549	0	0
'190590	Communion wafers,empty cachets f pharm use&sim prod&bakers' wares nes	83 713	4 974	0	0
'090111	Coffee, not roasted, not decaffeinated	74 440	4 124	0	0
'180632	Choc&food prep cntg cocoa in blocks,slabs/bars,not filld,not over 2 kg	45 657	3 974	0	0
'200911	Orange juice,unfermentd¬ spiritd,whether not sugard sweet,frozen	37 933	7 909	0	0
'151219	Sunflower-sed/safflower oil&their fractions refind but nt chem modifid	36 844	8 707	0	0
'210500	Ice cream and other edible ice, whether or not containing cocoa	36 229	11 889	0	0
'151620	Veg fats &oils&fractions hydrogenatd,inter/re-esterifid,etc,ref'd/not	32 145	6 325	0	0
'190410	Prep foods obtained by the swellg o roastg of cereal o cereal products	31 036	4 291	0	0
'020130	Bovine cuts boneless, fresh or chilled	28 223	7 087	0	0
'010290	Bovine, live except pure-bred breeding	26 097	8 594	0	0
'330129	Essential oils, nes	23 932	5 319	0	0
'151710	Margarine, excluding liquid margarine	23 011	7 265	0	0

'091099	Spices nes	21 231	5 880	0	10
'200919	Orange juice&nes,unfermentd not spiritd,whether or not sugard or sweet	17 165	8 049	0	10
'230120	Flour,meal&pellet of fish,crust,mol/oth aqua invert,unfit human cons	14 579	25 774	0	0
'180690	Chocolate and other food preparations containing cocoa nes	12 978	5 100	0	0
'121190	Plants &pts of plants(incl sed&fruit) usd in pharm,perf,insect etc nes	12 344	6 734	0	0
'210410	Soups and broths and preparations thereof	11 565	16 373	0	0
'210210	Yeasts, active	8 939	9 383	0	0
'151590	Veg fats&oils nes&their fractions,refind or not but not chemically mod	7 838	3 215	0	0
'080620	Grapes, dried	7 803	55 792	1	0
'200820	Pineapples nes,o/w prep or presvd,sugared,sweetened,spirited or not	7 716	4 784	0	0
'160420	Fish prepared or preserved, except whole or in pieces	6 742	9 492	0	0
'070190	Potatoes, fresh or chilled nes	6 323	9 793	0	0
'081190	Fruits&edible nuts uncook,steam/boil (water) sweetend/not,frozen,nes	5 821	7 544	0	0
'200949	Pineapple juice, unfermented, Brix value > 20 at 20°C, whether or not	5 060	12 527	0	9
'080290	Nuts edible, fresh or dried, whether or not shelled or peeled, nes	5 034	26 360	0	0
'100510	Maize (corn) seed	4 759	16 676	0	0
'121299	Vegetable products nes used primarily for human consumption	4 468	25 143	0	0
'020890	Meat and edible meat offal, nes fresh, chilled or frozen	3 874	55 086	0	0
'071080	Vegetables, frozen nes	3 745	3 099	0	0
'210610	Protein concentrates and textured protein substances	3 673	3 353	0	0
'070990	Vegetables, fresh or chilled nes	3 131	4 520	1	0
'160413	Sardines,sardinella&brislg o sprats prep o presvd,whole o pce ex mincd	3 030	4 211	0	0
'220210	Waters incl mineral&aeratd,containg sugar o sweeteng matter o flavourd	3 016	48 877	0	0

3.4.3 Discussion of products identified by the TPI and trade chilling ²⁹

In this section we are going to look at the market of the top products identified by the TPI and trade chilling for potential exports from South Africa. Only the top products are discussed. It does not mean that other products that were identified are not important, they potentially are.

3.4.3.1 Oranges, mandarins/clementines/wilkins and similar citrus, and fresh or dried lemons and limes (HS 080510, HS 080520 and HS 080550) ³⁰

Table 14 indicates that South Africa had a 35.2% market share of the imports of oranges (HS 080510) by Saudi Arabia in 2007. Egypt had the biggest market share of 54.7 %, followed by SA and then Lebanon, Zimbabwe and Brazil with 3% or less market share. There is a rising trend in the exports of oranges by SA to Saudi Arabia.

Table 15 indicates that SA had the second biggest market share for the imports of mandarins/clementines/wilkins and similar citrus (HS 080520) into Saudi Arabia for the year 2007. Pakistan had the biggest market share (23.6%), followed by SA and Morocco with market shares of 22.6 and 16.9%, respectively.

Table 16 indicates that the import market for fresh or dried lemons and limes (HS 080550) in Saudi Arabia was worth US\$ 25.1 million in 2007. SA has the highest market share (58%), followed by Egypt with a share of 15%.

No duty is payable on the imports of citrus into Saudi Arabia. ³¹

Table 14: Competitors in Saudi Arabia's market for oranges (HS 080510) in US '\$'000

Exporters	Imported value in 2003	Imported value in 2004	Imported value in 2005	Imported value in 2006	Imported value in 2007	% of market share 2007	% change 2006 - 2007
'World	88 113	82 174	157 292	111 923	117 582	100.0	5.1
'Egypt	48 836	47 620	117 441	63 241	64 274	54.7	1.6
'South Africa	27 373	26 571	30 566	40 656	41 383	35.2	1.8
'Lebanon	4 826	3 439	3 689	2 388	3 528	3.0	47.7
'Zimbabwe	844	1 417	1 013	1 057	2 802	2.4	165.1
'Brazil	31	576	460	271	2 366	2.0	773.1

Table 15: Competitors in Saudi Arabia's market for mandarins/clementines/wilkins and similar citrus (HS 080520) in US '\$'000

Exporters	Imported value in 2003	Imported value in 2004	Imported value in 2005	Imported value in 2006	Imported value in 2007	% of market share 2007	% change 2006 - 2007
'World	15 079	15 480	20 034	15 488	14 912	100.0	-3.7
'Pakistan	2 600	4 662	5 778	6 788	3 512	23.6	-48.3

²⁹ Where data for SA was available in the competitive position table from TradeMap, this data were used to determine SA's market share. Where SA 's data was not available in the competitive position table from TradeMap, export data of the value of SA 's exports to Saudi Arabia from the TPI was used to determine the value of Saudi Arabia's imports from SA. When these data from the TPI is used together with the data of the competitive position table to determine SA's market share, it must be interpreted with care.

³⁰ Trade Map - www.trademap.org

³¹ http://www.customs.gov.sa/CustomsNew/tariff/trfmain_E.aspx

'South Africa	1 973	2 240	4 765	1 223	3 366	22.6	175.2
'Morocco	4 948	2 743	3 227	2 285	2 522	16.9	10.4
'Turkey	2 165	1 320	1 847	1 742	1 194	8.0	-31.5
'Spain	55	109	181	267	1140	7.6	327.0

Table 16: Competitors in Saudi Arabia's market for fresh or dried lemons and limes (HS 080550) in US \$'000

Exporters	Imported value in 2003	Imported value in 2004	Imported value in 2005	Imported value in 2006	Imported value in 2007	% of market share 2007	% change 2006 - 2007
'World	5 993	9 632	12 140	17 451	25 066	100.0	43.6
'South Africa	3 531	4 366	5 477	8 713	14 431	57.6	65.6
'Egypt	1 145	2 278	2 941	2 590	3 626	14.5	40.0
'Turkey	247	416	762	2 722	1 999	8.0	-26.6
'India	239	511	550	894	1 244	5.0	39.1

3.4.3.2 Food preparations (HS 210690) ³²

Saudi Arabia has imported US \$ 444.8 million of food preparations (HS 210690) from the world in 2007. Of these food preparations only US \$ 59 000 was imported from SA in 2007. ³³ Table 17 indicates the major competitors for the imports of food preparations into the Saudi Arabian market.

The import duty for food preparations is 5% into the Saudi Arabian market, except for sweetmeats for diabetics (21069070) that is free of duty. ³⁴

Table 17: Competitors in Saudi Arabia's market for food preparations (HS 210690) in US \$'000

Exporters	Imported value in 2003	Imported value in 2004	Imported value in 2005	Imported value in 2006	Imported value in 2007	% of market share 2007	% change 2006 - 2007
'World	236 743	277 580	346 224	404 222	444 800	100.0	10.0
'Ireland	100 744	123 713	151 941	171 921	165 141	37.1	-3.9
'United States of America	36 286	34 868	48 108	58 226	62 881	14.1	8.0
'United Kingdom	19 487	23 428	23 017	28 125	35 608	8.0	26.6
'Denmark	9 238	14 137	18 467	24 556	31 708	7.1	29.1
'Egypt	14 765	16 070	24 148	22 689	23 405	5.3	3.2

³² Trade Map - www.trademap.org

³³ See footnote 29

³⁴ http://www.customs.gov.sa/CustomsNew/tariff/trfmain_E.aspx

3.4.3.3 Cigarettes (HS 240220) ³⁵

In 2007 the market for import of cigarettes (HS 240220) into Saudi Arabia was worth US\$ 472.7 million. The USA's had the biggest share of this market (53%), followed by Switzerland (20%). Table 18 indicates that SA had a market share of 3.7% in 2007. 2007 was the first year that the table indicates that cigarettes were exported by SA to Saudi Arabia. It is noted that Romania, who had entered the market in 2006, has increased its market share of cigarettes exports to Saudi Arabia sharply in 2007.

The import duty for cigarettes is 100% or SR100 for each 1000 cigarettes, whichever is the highest. ³⁶

Table 18: Competitors in Saudi Arabia's market for cigarettes (HS 240220) in US \$'000

Exporters	Imported value in 2003	Imported value in 2004	Imported value in 2005	Imported value in 2006	Imported value in 2007	% of market share 2007	% change 2006 - 2007
'World	354 084	400 073	433 885	443 625	472 681	100.0	6.5
'United States of America	262 589	283 921	233 984	223 364	252 226	53.4	12.9
'Switzerland	5 944	13 088	89 936	94 877	95 072	20.1	0.2
'Germany	9 476	12 878	19 614	32 776	46 797	9.9	42.8
'Romania	0	0	0	4 700	28 503	6.0	506.4
'South Africa	0	0	0	0	17 267	3.7	-
'Malaysia	468	2 915	2 734	2 232	2 089	0.4	-6.4

3.4.3.4 Tomato ketchup and other tomato sauces, and sauces, preparations, mixed condiments and seasoning (HS 210320 and HS 210390) ³⁷

Table 19 indicates that the total imports from the world of sauces, preparations, mixed condiments and mixed seasonings (HS 210390) by Saudi Arabia were US\$ 46.2 million in 2007. Of this SA only had a share of US\$ 139 000, i.e. 0.3% ³⁸

As indicated in table 20, the total imports of tomato ketchup and other tomato sauces (HS 210320) by Saudi Arabia from the world had a value of US\$ 46.1 million in 2007. SA did not exported tomato ketchup (HS 210320) to Saudi Arabia in 2007. ³⁹

The import duty on sauces, preparations, mixed condiments and mixed seasonings (HS 210390) is 5%, except for mayonnaise (21039010) and tomato ketchup and other tomato sauces (210320) which is 12%. ⁴⁰

³⁵ Trade Map - www.trademap.org

³⁶ http://www.customs.gov.sa/CustomsNew/tariff/trfmain_E.aspx

³⁷ Trade Map - www.trademap.org

³⁸ See footnote 29

³⁹ See footnote 29

⁴⁰ http://www.customs.gov.sa/CustomsNew/tariff/trfmain_E.aspx

Table 19: Competitors in Saudi Arabia's market for sauces, preparations, mixed condiments and mixed seasonings (HS 210390) in US '\$'000

Exporters	Imported value in 2003	Imported value in 2004	Imported value in 2005	Imported value in 2006	Imported value in 2007	% of market share 2007	% change 2006 - 2007
'World	24 362	34 146	33 430	37 546	46 165	100.0	23.0
'United States of America	14 708	21 690	18 027	16 840	19 620	42.5	16.5
'United Arab Emirates	726	1 433	2 547	6 028	8 302	18.0	37.7
'Oman	2 499	3 866	5 026	4 711	5 590	12.1	18.7
'Egypt	1 039	1 445	2 146	3 154	3 853	8.3	22.2
'Mexico	279	317	341	551	1 603	3.5	190.9

Table 20: Competitors in Saudi Arabia's market for tomato ketchup (HS 210320) in US '\$'000

Exporters	Imported value in 2003	Imported value in 2004	Imported value in 2005	Imported value in 2006	Imported value in 2007	% of market share 2007	% change 2006 - 2007
'World	19 260	18 893	22 592	20 993	24 451	100.0	16.5
'United Arab Emirates	8 221	7 706	8 748	9 020	11 934	48.8	32.3
'Egypt	1 724	1 504	2 921	3 130	4 236	17.3	35.3
'Oman	2 609	3 387	5 083	3 963	3 791	15.5	-4.3
'United States of America	1 380	907	1 185	1 679	1 447	5.9	-13.8

3.4.3.4.1 Consumer market for sauces, dressings and condiments in Saudi Arabia ⁴¹

The market for sauces, dressings and condiments was worth SR1.3 billion in 2008. There was a 6% growth in value between 2007 and 2008, although there was a slight increase in unit prices during 2008. The growing expatriate community boosts the sales. A constant value compound annual growth rate (CAGR) ⁴² of 7% is expected with sales reaching SR1.9 billion by 2013.

Supplementary information on the sales of sauces, dressings and condiments by subsector as well as the CAGR by subsector and the brand share of the major role players in the market are included in Annexes 6 and 7.

⁴¹ www.portal.euromonitor.com

⁴² <http://moneyterms.co.uk/cagr/>, Compound annual growth rate (CAGR) is an average growth rate over a period of several years. It is a geometric average of annual growth rates: $CAGR = (Ending\ value / starting\ value)^{1/(number\ of\ years)} - 1$

3.4.3.5 Juices (HS 200980, HS 200990, HS 200929 and HS 200949) ⁴³

Saudi Arabia's import of fruit and vegetable juice (HS 200980) from the world was worth US\$ 64.1 million in 2007. Imports show an increasing trend over the period, with an increase of 34% between 2006 and 2007. Table 21 indicates that India is the major competitor in this import market. The value of imports from SA was US\$ 71 000 in 2007. ⁴⁴

Table 22 indicates that Saudi Arabia's import market for mixtures of juices (HS 200990) was worth US\$ 42.2 million in 2007. Growth was on an upward trend in this market, with an increase of 27% between 2006 and 2007. The Netherlands (49%) and Germany (14%) were the major competitors in this market for the year 2007. SA's value of import market was US\$ 50 000 in 2007. ⁴⁵

Table 21: Competitors in Saudi Arabia's market for fruit and veg juice (HS 200980) in US \$'000

Exporters	Imported value in 2003	Imported value in 2004	Imported value in 2005	Imported value in 2006	Imported value in 2007	% of market share 2007	% change 2006 - 2007
'World	29 204	40 068	45 163	48 014	64 079	100.0	33.5
'India	17 114	21 646	26 542	29 122	41 297	64.4	41.8
'Kuwait	3 294	4 475	5 036	2 689	3 399	5.3	26.4
'Denmark	879	908	1 074	916	2 334	3.6	154.8
'Egypt	618	854	1 341	2 070	2 236	3.5	8.0
'United Arab Emirates	409	554	435	3 616	2 197	3.4	-39.2

Table 22: Competitors in Saudi Arabia's market for mixtures of juices (HS 200990) in US \$'000

Exporters	Imported value in 2003	Imported value in 2004	Imported value in 2005	Imported value in 2006	Imported value in 2007	% of market share 2007	% change 2006 - 2007
'World	20 435	23 465	28 804	33 265	42 233	100.0	27.0
'Netherlands	7 353	8 330	9 956	16 206	20 837	49.3	28.6
'Germany	2 727	3 176	4 398	4 036	6 095	14.4	51.0
'Denmark	828	782	818	12	3 241	7.7	26908.3
'United Kingdom	837	1 816	969	2 201	2 766	6.5	25.7

The Saudi Arabian market for imports of pineapple juice (HS 200949) and grapefruit juice (HS 200929) was respectively worth US\$ 5 million and US\$ 839 000. The Netherlands (56%) and Thailand (26%) were the major players in the pineapple juice market (HS 200949), while the Nederland's (44%), Kuwait (23%) and Austria (20%) were the major players in the grapefruit juice market (HS 200929) in 2007. SA's share of the pineapple juice and grapefruit juice

⁴³ Trade Map - www.trademap.org

⁴⁴ See footnote 29

⁴⁵ See footnote 29

markets, were US\$ 9 000 and US\$ 87 000 respectively in 2007. ⁴⁶ The duty payable for the import of juice into Saudi Arabia is 5%. ⁴⁷

3.4.3.5.1 Consumer market for fruit and vegetable juices in Saudi Arabia ⁴⁸

Sales in the juice market have increased with 6% to reach a value of SR4.8 billion in 2008. The demand for fruit juices is the highest in summer. Prices in the juice market were stable in 2008. A constant value CAGR is forecasted up to 2013.

Orange ranked as number one flavor in both 100% juice and juice drinks (up to 24% juice) in 2008, followed by Mango. Mango was the leading flavour in nectars (25-99% juice) in 2008. Orange is a well-liked fruit and it is full of nutrients and vitamin C, while mango is very popular among people from the Far East, thus the high demand for this juice flavour is fuelled by Asian expatriates.

Supplementary information on the sales of juices by subsector as well as the CAGR by subsector and the brand share of the major role players in the market are included in Annexes 8 and 9.

3.4.3.6 Maize (HS 100590) ⁴⁹

Total imports of maize into Saudi Arabia had a value of US\$ 461.4 million in 2007. Major competitors in this import market are Argentina and the United States of America with market shares of 51% and 41% respectively as indicated in table 23. During the same period, SA did not export maize to Saudi Arabia. ⁵⁰

In January 2009, the Saudi Arabian government issued a revised animal feed subsidy list. The Saudi Arabian government will provide rebates that range from \$26 (rice hulls) to \$101 (soy-bean meal) per metric ton, depending on the type of imported feed under this program. The rebate will be paid directly to the local importer. ⁵¹

It is interesting to note that the tariff for the import of maize (HS 100590) into Saudi Arabia is 0% and yet SA did not export this product. ⁵²

Table 23 : Competitors in Saudi Arabia's market for maize (HS 100590) in US '\$000

Exporters	Imported value in 2003	Imported value in 2004	Imported value in 2005	Imported value in 2006	Imported value in 2007	% of market share 2007	% change 2006 - 2007
'World	130 435	145 859	187 470	212 085	461 410	100.0	117.6
'Argentina	98 678	81 065	159 950	124 084	234 318	50.8	88.8
'United States of America	21 946	50 043	23 564	80 382	189 009	41.0	135.1
'Sudan	345	628	0	0	16 601	3.6	-
'Brazil	5 715	9 607	0	2 089	12 262	2.7	487.0

46 See footnote 29

47 http://www.customs.gov.sa/CustomsNew/tariff/trfmain_E.aspx

48 www.portal.euromonitor.com

49 Trade Map - www.trademap.org

50 See footnote 29

51 FAIRS Country Report_Riyadh_Saudi Arabia_7-7-2009

52 http://www.customs.gov.sa/CustomsNew/tariff/trfmain_E.aspx

'Yemen	1 951	2 338	2 424	3 253	5 105	1.1	56.9
'Turkey	1	6	20	1	1 514	0.3	151300.0
'Egypt	157	106	526	640	936	0.2	46.3

3.4.3.7 Preparations of cereals, flour, starch/milk for infant use (HS 190110) ⁵³

Saudi Arabia's total import of preparations of cereals, flour, starch/milk for infant use (HS 190110) were US\$ 232 million in 2007. Ireland was the major competitor in this market (58% market share), followed by France and Spain with market shares of 11% and 10% respectively as can be seen in table 24.

There is no duty payable on the imports of preparation of cereals, flour, starch/milk for infant use (HS 190110). ⁵⁴

Table 24: Competitors in Saudi Arabia's market for Prep of cereals, flour, starch/milk for infant use, put up for retail sale (HS 190110) in US \$'000

Exporters	Imported value in 2003	Imported value in 2004	Imported value in 2005	Imported value in 2006	Imported value in 2007	% of market share 2007	% change 2006 - 2007
'World	87 568	125 534	156 058	210 212	231 953	100.0	10.3
'Ireland	47 625	47 663	85 022	127 977	134 971	58.2	5.5
'France	8 779	18 087	18 342	23 075	26 480	11.4	14.8
'Spain	4 093	6 927	10 678	18 915	23 690	10.2	25.2
'Netherlands	7 025	11 229	17 088	16 826	15 111	6.5	-10.2
'Argentina	0	0	0	5 977	12 868	5.5	115.3

3.4.3.7.1 Consumer market for baby food in Saudi Arabia ⁵⁵

The value of sales of baby food is expected to increase by nearly 21% in 2009 to exceed SR2 billion. It is expected that the constant sales value of baby food will increase at a CAGR of around 7% and that sales will reach SR3 billion by end of 2014. ⁵⁶

Milk formula drives the sales of baby food in Saudi Arabia (ranking amongst the top countries in terms of per capita consumption). Sales of milk formula consist of powder milk only, since liquid milk formula does not exist in Saudi Arabia. The extensive penetration and popularity of powder milk formula, which enjoys convenience, lower prices and longer shelf life of powder milk, over the liquid format, prevents the development of such liquid formats.

Supplementary information on the sales of baby food by subsector as well as the CAGR by subsector and the brand share of the major role players in the market are included in Annexes 10 and 11.

⁵³ Trade Map - www.trademap.org

⁵⁴ http://www.customs.gov.sa/CustomsNew/tariff/trfmain_E.aspx

⁵⁵ www.portal.euromonitor.com

⁵⁶ www.portal.euromonitor.com

3.4.3.8 Milk powder not exceeding 1.5% fat, Milk and cream powder unsweetened exceeding 1.5% fat, Milk and cream nes sweetened (HS 040210, HS 040221 and HS 040299)⁵⁷

The total value of the imports of milk powder not exceeding 1.5% fat (HS 040210) was US \$ 188.6 million in 2007. Table 25 indicates that the major competitors in this market were New Zealand and Australia with market shares of 67% and 17% respectively. There was an increase of 53% in the imports of this product between 2006 and 2007.

The imports in the milk and cream powder unsweetened exceeding 1.5% fat (HS 040221) were worth US \$ 226 million in 2007. The major competitors in this market were the Netherlands, New Zealand, Malaysia and Ireland, with market shares of 21%, 18%, 11% and 9% respectively as can be seen in table 26.

The value of imports by Saudi Arabia of milk and cream nes sweetened (HS 040299) were US \$ 135 million in 2007. The major competitors in this market were the Nederland's, Denmark, Malaysia and Germany as can be seen in table 27.

The tariff for the import of these products (HS 040210, HS 040221 and HS 040299) is 5%.⁵⁸

Table 25: Competitors in Saudi Arabia's market for Milk powder not exceeding 1.5% fat (HS 040210) in US \$'000

Exporters	Imported value in 2003	Imported value in 2004	Imported value in 2005	Imported value in 2006	Imported value in 2007	% of market share 2007	% change 2006 - 2007
'World	80 956	124 275	126 575	123 611	188 635	100.0	52.6
'New Zealand	34 807	69 419	77 307	74 210	126 035	66.8	69.8
'Australia	11 452	9 189	11 928	25 893	31 662	16.8	22.3
'Ukraine	123	416	895	1 290	6 168	3.3	378.1
'Netherlands	11 320	16 181	12 521	7 044	6 075	3.2	-13.8
'Belgium	172	1 369	118	118	4 764	2.5	3937.3

Table 26: Competitors in Saudi Arabia's market for Milk and cream powder unsweetened exceeding 1.5% fat (HS 040221) in US \$'000

Exporters	Imported value in 2003	Imported value in 2004	Imported value in 2005	Imported value in 2006	Imported value in 2007	% of market share 2007	% change 2006 - 2007
'World	64 496	92 618	193 611	192 372	226 424	100.0	17.7
'Netherlands	15 512	12 613	46 821	61 166	47 002	20.8	-23.2
'New Zealand	24 502	38 522	78 298	45 311	41 469	18.3	-8.5
'Malaysia	776	909	12 210	2 672	25 645	11.3	859.8
'Ireland	2 131	9 323	15 218	21 329	20 741	9.2	-2.8
'France	4 994	3 679	9 095	20 072	16 922	7.5	-15.7

57

Trade Map - www.trademap.org

58

http://www.customs.gov.sa/CustomsNew/tariff/trfmain_E.aspx

Table 27: Competitors in Saudi Arabia's market for Milk and cream nes sweetened (HS 040299) in US \$'000

Exporters	Imported value in 2003	Imported value in 2004	Imported value in 2005	Imported value in 2006	Imported value in 2007	% of market share 2007	% change 2006 - 2007
'World	115 260	166 873	110 144	97 939	135 030	100.0	37.9
'Netherlands	66 852	102 073	48 307	33 008	50 157	37.1	52.0
'Denmark	10 172	17 241	26 403	10 269	21 499	15.9	109.4
'Malaysia	8 071	23 313	11 464	12 564	20 662	15.3	64.5
'Germany	4 543	3 355	6 651	18 550	19 488	14.4	5.1
'France	13 151	14 494	4 963	9 642	11 235	8.3	16.5

3.4.3.8.1 Consumer market for milk products in Saudi Arabia ⁵⁹

Sales value is expected to reach just more than SR 4 billion in 2009. Semi-skimmed fat-free fresh and UHT milk drive demand for drinking milk in 2009. There was slight movement in unit price in 2009, because of massive domestic milk production. There was a drop in the sales of milk power and a negative CAGR of 1.9 % is expected for milk power up to 2014, as can be seen in Annex 12.

Annex 13 indicates the major brands in the drinking milk market in Saudi Arabia for 2008.

3.4.3.9 Bovine cuts boneless, frozen (HS 020230) ⁶⁰

Table 28 indicates that the import market for frozen boneless bovine cuts was worth US \$ 144.9 million in 2007. The import of this product shows an increasing trend over the period, with an increase of 42% between 2006 and 2007. India and Brazil are the major players in this market with market shares of 50% and 43% respectively in 2007.

The import tariff of frozen boneless bovine cuts into Saudi Arabia is 5%. ⁶¹

Table 28: Competitors in Saudi Arabia's market for bovine cuts boneless, frozen (HS 020230) in US \$'000

Exporters	Imported value in 2003	Imported value in 2004	Imported value in 2005	Imported value in 2006	Imported value in 2007	% of market share 2007	% change 2006 - 2007
'World	40 748	68 181	52 297	102 137	144 898	100.0	41.9
'India	0	18 457	18 996	45 012	71 988	49.7	59.9
'Brazil	27 288	37 985	23 228	46 809	61 744	42.6	31.9
'United States of America	4 195	1 516	1 444	2 965	3 829	2.6	29.1
'Paraguay	4 400	6 330	3 746	2 278	3 435	2.4	50.8

⁵⁹ www.portal.euromonitor.com

⁶⁰ Trade Map - www.trademap.org

⁶¹ http://www.customs.gov.sa/CustomsNew/tariff/trfmain_E.aspx

3.4.3.10 Other products ⁶²

In this section we look at some of the products that are not under the top 5 products in the TPI or the "trade chilling concept", but that is under the top products in these indexes. These are included at a request by SA's agricultural industry players, which have an interest in Saudi Arabian market. It should be noted that these products may be as important, as all the top products on the indexes.

3.4.3.10.1 Maize seed (HS 100510)

In 2007 the import market for maize seed (HS 100510) into Saudi Arabia was worth US \$ 4.8 million. The United States of America is the major role player with a market share of 55% in 2007. They were followed by the Netherland and France with shares of 18% and 12%, respectively as indicated in table 29. SA has exported US \$ 24 000 in 2006 to Saudi Arabia, but zero in the other years under discussion.

The import of maize seed is duty free into Saudi Arabia. ⁶³

Table 29: Competitors in Saudi Arabia's market for Maize seed (HS 100510) in US \$'000

Exporters	Imported value in 2003	Imported value in 2004	Imported value in 2005	Imported value in 2006	Imported value in 2007	% of market share 2007	% change 2006 - 2007
'World	568	821	1711	1553	4759	100.0	206.4
'United States of America	219	487	1690	951	2594	54.5	172.8
'Netherlands	0	1	0	415	871	18.3	109.9
'France	296	195	2	4	566	11.9	14050.0
'Egypt	4	6	6	82	303	6.4	269.5
'India	0	131	8	0	119	2.5	-

3.4.3.10.2 Refined sugar in solid form (HS 170199)

The total import of refined sugar in solid form into Saudi Arabia was US \$ 113.7 million in 2007, as can be seen in table 30. The major role player in this market was the United Arab Emirates, with a market share of 82%, followed by India with a market share of 11% in 2007. The import trend by Saudi Arabia of refined sugar in solid form was upward, with a sharp increase of 71% between 2006 and 2007.

There is no import duty on this product. ⁶⁴

⁶² Trade Map - www.trademap.org

⁶³ http://www.customs.gov.sa/CustomsNew/tariff/trfmain_E.aspx

⁶⁴ http://www.customs.gov.sa/CustomsNew/tariff/trfmain_E.aspx

Table 30: Competitors in Saudi Arabia's market for refined sugar, in solid form, nes (HS 170199) in US \$'000

Exporters	Imported value in 2003	Imported value in 2004	Imported value in 2005	Imported value in 2006	Imported value in 2007	% of market share 2007	% change 2006 - 2007
'World	16 218	30 327	24 575	66 488	113 654	100.0	70.9
'United Arab Emirates	12 386	28 356	22 217	63 306	93 191	82.0	47.2
'India	38	40	63	61	12 561	11.1	20491.8
'Thailand	913	0	0	0	4 224	3.7	-
'Belgium	1 534	510	927	856	1 278	1.1	49.3
'United States of America	218	217	201	206	411	0.4	99.5

3.4.3.10.3 Chocolates (HS 180620, 180632 and 180690)

The total imports of Saudi Arabia for chocolate and other food preparations containing cocoa weighting more than 2 kg (HS 180620) was US \$ 66.8 million in 2007, as indicated by table 31. The major players in this import market were the Netherlands (46%), Poland (19%) and France (8%). SA has exported US \$ 8.1 million to Saudi Arabia in 2007⁶⁵.

Saudi Arabia has imported US \$ 45.7 million chocolate & food prep containing cocoa, not over 2 kg (HS 180632) from the world. The major player in this market for 2007 was the United Arab Emirates with a market of 72% followed by Ireland and the United States of America with shares of 13% and 6% respectively as can be seen in table 32. During the period under discussion, there were no exports from SA.⁶⁶

The import market for Saudi Arabia for chocolate and other food preparations containing cocoa nes (HS 180690) was worth US \$ 13 million in 2007 as indicated by table 33. The United States of America was the major shareholder in this market (28%), followed by Australia (19%), Germany (9%) and Kuwait (9%). There were no exports from SA into Saudi Arabia.⁶⁷

The import duty on HS 1806 products discussed vary between 5%, 8% and 15%.⁶⁸

⁶⁵ See footnote 29

⁶⁶ See footnote 29

⁶⁷ See footnote 29

⁶⁸ http://www.customs.gov.sa/CustomsNew/tariff/trfmain_E.aspx

Table 31: Competitors in Saudi Arabia's market for Chocolate & other food preparations containing cocoa weighting more than 2 kg (HS 180620) in US \$'000

Exporters	Imported value in 2003	Imported value in 2004	Imported value in 2005	Imported value in 2006	Imported value in 2007	% of market share 2007	% change 2006 - 2007
'World	21 756	18 534	39 207	55 255	66 791	100.0	20.9
'Netherlands	5 855	4 454	10 174	18 009	30 992	46.4	72.1
'Poland	2 142	2 355	8 834	14 440	12 772	19.1	-11.6
'France	2 036	2 141	2 213	4 313	5 601	8.4	29.9
'United Arab Emirates	1 125	2 068	2 303	2 128	2 555	3.8	20.1
'Oman	22	58	266	1 288	2 143	3.2	66.4

Table 32: Competitors in Saudi Arabia's market for Choc & food prep containing cocoa, not over 2 kg (HS 180632) in US \$'000

Exporters	Imported value in 2003	Imported value in 2004	Imported value in 2005	Imported value in 2006	Imported value in 2007	% of market share 2007	% change 2006 - 2007
'World	1 473	8 042	7 483	73 196	45 657	100.0	-37.6
'United Arab Emirates	17	1 863	5 430	59 856	32 936	72.1	-45.0
'Ireland	25	0	0	2 437	5 896	12.9	141.9
'United States of America	8	75	1 148	5 089	2 515	5.5	-50.6
'Belgium	6	115	104	213	707	1.5	231.9
'United Kingdom	11	255	3	637	677	1.5	6.3

Table 33: Competitors in Saudi Arabia's market for Chocolate and other food preparations containing cocoa nes (HS 180690) in US \$'000

Exporters	Imported value in 2003	Imported value in 2004	Imported value in 2005	Imported value in 2006	Imported value in 2007	% of market share 2007	% change 2006 - 2007
'World	39 543	45 097	53 469	9 993	12 978	100.0	29.9
'USA	1 182	998	503	663	3 591	27.7	441.6
'Australia	173	1	1	2	2 410	18.6	120 400.0
'Germany	470	582	64	524	1 222	9.4	133.2
'Kuwait	610	1 047	908	634	1 193	9.2	88.2
'United Arab Emirates	30 300	35 673	42 021	3 959	868	6.7	-78.1

3.5 Tariff structure⁶⁹

Tariffs of Saudi Arabia were already low when they joined the WTO in 2005. Saudi Arabia as part of the Gulf Co-operation Council (GCC) has been working towards the phasing in of a 5% common external tariff as mandated by the GCC in 2003. In June 2009 a third phase of tariff reductions has taken place as Saudi Arabia has agreed at the WTO. Most of its tariffs are below the WTO limits.

Agriculture tariffs are normally 5%, but there are tariffs that are zero as well as tariffs that are higher such as those for cigarettes. The tariffs for a specific product can be found at: http://www.customs.gov.sa/CustomsNew/tariff/trfmain_E.aspx. Click on tariff search.

Imports from companies based in the GCC and majority owned by GCC nationals are exempt from duty, if at least 40% of value is added was undertaken within the GCC.

4. TRADE BARRIERS^{70 71 72}

4.1 Non Tariff Barriers

The importation of pork, firearms and most non-Islamic religious materials are deemed to be offensive to Islamic principles. Alcohol and used clothing are also prohibited to be imported into Saudi Arabia. The importation of certain products requires special approval e.g. agricultural seeds, live animals, horses, products containing alcohol, etc.

The Arabian blacklisting of foreign firms that support Israel in various ways can be a barrier. The GCC agreed at the end of 1994 to lift the secondary and tertiary boycotts on companies trading with Israel, though some companies on that list have been refused visas, suggesting that the regulations are still applied selectively.

Saudi Arabia applies the principle of Single Entry Point, by which any products admitted into the GCC through a GCC customs point may legally traverse borders within the GCC without further examination or inspection. However, the land crossing between Saudi Arabia and the United Arab Emirates still has periodic inspections.

As from the end of December 2007, Saudi Arabia eliminated the requirement to authenticate import documentation. Some products, notably agricultural biotechnology products need a certificate from the country of origin confirming the product's fitness for human consumption and sales in the country of origin. This certificate must be authenticated by the local chamber of commerce in the country of origin.

Non-food consumer products must have a certificate of conformity issued under Saudi Arabia's Conformity Certificate Program (COCP), before entering the country. This COCP requires every shipment of products sold in Saudi Arabia to be accompanied by a document certifying that the product conforms to the relevant Saudi Arabian technical regulation or standard ("conformity certificate"). The requirement applies to all products, including domestic products, except those subject to Saudi Arabia's sanitary and phytosanitary regulations.

69 Country Forecast: Saudi Arabia - July 2009. The Economist Intelligence Unit. www.eiu.com

70 <http://www.ustr.gov/about-us/press-office/reports-and-publications/2009/2009-national-trade-estimate-report-foreign-trade>

71 Country Commerce: Saudi Arabia – 2009. The Economist Intelligence Unit. www.eiu.com

72 FAIRS Country Report_Riyadh_Saudi Arabia_7-7-2009

In February 2009 the Saudi Arabian Department of Customs implemented a regulation mandating that all items being shipped to Saudi Arabia must have the country of origin engraved or affixed by a non-removable sticker.

The GCC Customs Union is working toward harmonizing their standards and conformity assessment systems. Currently Member States continue to apply either its own standard or a GCC standard, resulting in a complicated situation for some businesses.

The GCC Standards Committee approved two new standards for the labeling and expiration periods of food products in May 2008. This new standards eliminate the long standing requirement that at least one-half of a product's shelf life must be valid when a product reaches a port of entry. Officials from the Gulf Standards Organization (GSO) have stated that GCC Member States will accept use of the terms "best by" and "best before" as meeting the date labeling requirement for shelf-stable products.

The Food and Agricultural Import Regulations and Standards (FAIRS) Country Report can be used to obtain regulatory requirements and import procedures for food and agricultural imports, imposed by the government of Saudi Arabia. < <http://gain.fas.usda.gov/Lists/Advanced%20Search/AllItems.aspx> FAIRS Country Report_Riyadh_Saudi Arabia_7-7-2009 > This report also states that most common non-tariff barriers that is experienced by U.S. food product exporters in Saudi Arabia are: biotech labeling, production & expiration date regulations, Arabic labeling requirements, a declaration that animals slaughtered and exported to Saudi Arabia were not fed with feed containing protein, fat or remnants of animal origin, and a Halal Slaughtering certificate for both livestock and poultry meat.

4.2 Sanitary and phyto-sanitary (SPS) regulations

Bahrain and Oman (GCC member states) notified WTO Members in the 2nd half of 2007 of proposed procedures meant to harmonize food safety import requirements for all GCC member states. Some WTO Members provided comments outlining significant concerns with the procedures that do not appear to have a clear scientific basis and would substantially disrupt food exports to GCC Member States from their trading partners. The GCC Member States have indicated that they are developing a response to these comments.

Saudi standards sometimes seem to be biased against imports from particular countries. Health regulations, issued by the King Abdul Aziz City for Sciences and Technology (KACST) and the Saudi cabinet, also have been applied intermittently to halt certain imports (for example, fruits and vegetables from Jordan, and from the UK); the affected countries have argued that such bans constitute non-tariff barriers.

In January 2002, following a recommendation from KACST, the cabinet decided to allow the import of irradiated foods.

Saudi standards are typically based on CODEX Alimentarius regulations and to some extent on European and U.S. standards, but are modified for Saudi Arabian conditions. Food standards were set by the Saudi Arabian Standards Organization (SASO) and imported foodstuffs were tested by the Saudi Arabia's Ministry of Commerce and Industry (MOCI). From May 2009 the Saudi Food and Drug Authority (SFDA) (which was established in March 2003), took over the responsibility for inspecting imported high value food products. The SFDA will take charge of setting food standards and ensuring the safety of food products, in the next few months.

Saudi Arabia has banned the importation of cattle, sheep, goats, antelope and camels from South Africa, due to foot and mouth disease (FMD). South Africa has a FMD free zone without

vaccination which was accepted by the Organisation International Epizooties (OIE) in May 2002, of which the status has not recently changed.⁷³ During the South African – Saudi Joint Commission in February 2009, the Saudi side undertook to send an expert team to South Africa to investigate the FMD situation, with the view to reconsider it.⁷⁴ At the end of January 2010 the Saudi Arabian Government has indicated that they have decided to delay the uplifting of the ban on live animal imports because of Rift Valley fever, as they will rather evaluate its status according to the new reports to be issued by the OIE.⁷⁵

If imported products or their country of origin do not comply with Saudi standards, they are very quick to impose an embargo on the importation of such products. In this regard they are not accommodating and would not accept certification, declaration or opinion of a reputed international organisation such as the International Organisation for Animal Diseases⁷⁶.

4.3 Trade related infrastructure⁷⁷

Saudi Arabia's road-building programme was given priority in the early five-year development plans. Major arteries include the trans-peninsular highway and the Tapline road from Dammam to the Jordanian border. Motorways connect most urban centres.

There are three international airports at Jeddah, Dammam and Riyadh. The airports at Mecca and Medina can receive international flights bringing religious pilgrims to the country, but non-Muslims are not permitted to enter either city.

The railway network consists of two lines totaling 1000 km between Dammam and Riyadh. Three new lines that will add 2 800 km are prioritised. Saudi Arabia has six major ports (Yanbu, Jeddah, Dammam, Jubail, Jizan and Duba) and two specialised industrial ports at Jubail and Yanbu. There are also 14 minor ports.

There were 28.4m mobile phones in the Kingdom in 2007, equivalent to 116% of the population. This compares with 33% of the population in 2003. In comparison, landline penetration stood at 16.8% of the population in 2007. In 2007 roughly 25% of the population was internet users.

5. CONCLUSION

The purpose of this study was to give an overview of the Kingdom of Saudi Arabia and to identify possible agricultural products that can be exported to Saudi Arabia from SA.

It was noted that Saudi Arabia is a major importer of agricultural and food products. The dry climate and semi dessert conditions of Saudi Arabia severely limit its agricultural potential and for this reason about 14 % of Saudi Arabian imports are food imports.

Support by the Saudi Government to agriculture has become less, as officials questioned the use of the Saudi Arabia's limited water resources. This led to the reduction of the buying price of wheat. The government is trying to phase out wheat production by 2016, as the irrigation requirements of the wheat harvest are placing strain on water resources. Production will rather focus more on higher value crops like fruits and vegetables.

⁷³ SA / Kingdom of Saudi Arabia (KSA) Joint Economic Commission (JEC) 19 – 23 February 2009 Briefing Document: KSA - DTI

⁷⁴ Minutes of the Third Session of the South African – Saudi Joint Commission, 19 – 23 February 2009

⁷⁵ Note No. PR08/01/10. Royal Embassy of Saudi Arabia, Pretoria. 29 January 2010.

⁷⁶ Inputs and comments from Directorate International Relations - DAFF

⁷⁷ Country Profile - 2008. Saudi Arabia. The Economist Intelligence Unit

Saudi Arabia is investing in developing farmland abroad. Saudi Arabia has also indicated that they might be interested to invest in South African farms⁷⁸.

The TPI and the "trade chilling concept" have been used to identify possible agricultural exports to Saudi Arabia.

The top 10 products identified by the TPI are: Oranges (HS 080510), Food preparations (HS 210690), Cigarettes (HS 240220), Sauces and preparations (HS 210390), Mixtures of juices (HS 200990), Fruit & veg. juice (HS 200980), Fresh or dried lemons (HS 080550), Fresh grapes (HS 080610), Mandarins & clementine's (HS 080520) and Pears & quinces (HS 080820). Note that this is only the top 10 of the products that have a full score under the TPI. In total there are 22 products that have a full score. Products for potential export that score 4 or 3 on the TPI especially at the products with a high indicative trade potential (ITP) can also be considered. It is noted that only 2 products out of the 21 products, that have scored a 5 in the TPI that was drawn up on data for the year 2007, were not exported by SA to Saudi Arabia in 2008 {Cereals, excluding maize, in grain form, pre cooked or otherwise prepared (HS 190490) and Swedes, mangold, fodder, root, hay, cloveretc (HS 121490)}.

In the "trade chilling concept" 43 products were identified. The top 10 products identified to be exported by the trade chilling are: maize (HS 100590), preparations for infant use (HS 190110), unsweetened milk and cream powder exceeding 1.5 % fat (HS 040221), milk power not exceeding 1.5 % fat (HS 040210), frozen boneless bovine cuts (HS 020230), sweetened milk and cream (HS 040299), cheese (HS 040690), refined sugar in solid form (HS 170199), communion wafers, empty cachets for pharm use & similar products & bakers' wares (HS 190590) and coffee not roasted or decaffeinated (HS 090111). It must be noted that all the products identified in the "trade chilling" exercise can be considered for potential exports. This products are currently not exported to Saudi Arabia (except for dried grapes or fresh or chilled vegetables of which a value of less than US\$ 15 000 were exported in 2007), but have an exports potential of more than US\$ 3 million.

An analysis of Saudi Arabia's market for some of the agricultural products identified by the TPI and the "Trade Chilling" was undertaken. In some of these markets, the consumer market of the products was identified. These import markets include: Oranges, mandarins/clementines-/wilkins and similar citrus, and fresh or dried lemons and limes (HS 080510, HS 080520 and HS 080550), Food preparations (HS 210690), Cigarettes (HS 240220), Tomato ketchup and other tomato sauces, and sauces, preparations mixed condiments & seasoning (HS 210320 and HS 210390), Juices (HS 200980, HS 200990, HS 200929 and HS 200949), Maize (HS 100590), Preparations of cereals, flour, starch/milk for infant use (HS 190110), Milk powder not exceeding 1.5% fat, Milk and cream powder unsweetened exceeding 1.5% fat, Milk and cream nes sweetened (HS 040210, HS 040221 and HS 040299), Bovine cuts boneless, frozen (HS 020230), Maize seed (HS 100510), Refined sugar in solid form (HS 170199) and Chocolates (HS 180620, 180632 and 180690). The consumer market of the products identified are discussed in attachments and include: market for sauces, dressings and condiments, market for fruit and vegetable juices, market for baby food and the market for milk products.

From the analysis of the selected agricultural products, it is clear that high tariffs are not the reason trade has not taken place between SA and Saudi Arabia. There could be other reasons than high tariffs that need further investigation, especially with regard to products that have been identified for potential export in this study.

6. COMMENTS ON STUDY

GDP growth in the developing Eastern Countries is expected to be higher than the growth in the developed countries of the North, after the world wide economic recession of 2008/09. Saudi Arabia is in this region, but the world wide economic recession and Saudi's dependence on oil and petroleum products may effect its growth rate negative in 2009. The high oil price has however allowed Saudi Arabia to build up ample reserves and they should be able to handle the world financial crisis with ease. A growth rate of 3.7 % per year is forecasted for the period 2010 - 2014.⁷⁹

Saudi Arabia is a major importer of food products. About 14 % of Saudi's total imports are food. The consumer expenditure on food, beverages and tobacco are forecasted to grow from US\$ 33 390 million in 2008 to US\$ 46 379 million in 2013.⁸⁰ As Saudi Arabia land and climatic conditions are not conducive to agricultural production, it is very clear that Saudi Arabia's imports of food products will increase. Saudi Arabia is also a country that is "trade friendly" and they work to be competitive in trade.

South Africa was exporting R 523.1 million of agricultural products to Saudi Arabia in 2008. By using the TPI and "Trade Chilling Concept" it is possible to identify which products have the potential to be used for trade deepening and trade widening to increase exports to Saudi Arabia.

SA's agricultural exports to Saudi Arabia can increase substantially, but the following must be taken into consideration:

- The products that have been identified for potential export by the TPI and the "Trade Chilling Concept",
- The industries can make use of the export promotion facilities of the DTI, that can support their export efforts like missions, pavilions, research, agro-processing hub etc (For more info see <<http://www.thedti.gov.za/exporting/resourcebasedindustries.htm>>). It should be established to what extent the private sector in South Africa has done its own market analysis in the Middle East before one embarks on any trade promotion. Such an initiative should not be limited to one country but should include all countries in that region,
- The currency of Saudi Arabia (Saudi Riyal) is pecked against the US Dollar and this may influence the exchange rate between the Rand and the Saudi Riyal (a single currency for the Gulf Region may overcome this potential problem for Saudi Arabia),
- Saudi Arabia is an Islamic country, whatever is exported there such as preserved food may not contain any substance or traces of pork. Alcohol is also not allowed,
- There were some decreases in import tariffs into Saudi Arabia in June 2009. Exporters should make sure that the latest tariff schedule is used,
- As Saudi Arabia is phasing out wheat production to save scarce water resources, this will influence imports e.g. more wheat will be imported and there will be a movement towards the production of higher value crops,
- The investment in developing farmland abroad, will influence the imports of agricultural and food products,
- The possible investment by Saudi Arabia in SA agricultural land may influence potential agricultural exports. Combining the capital investments of Saudi Arabia with the agricultural skills and technology in South Africa could be of mutual benefit for both parties. Such cooperation, however, might not be an opportunity to empower small scale emerging farmers. The South African partners in such a project should be highly skilled and well experienced and must be able to guarantee success over the short term,

79 Country Forecast - Saudi Arabia, October 2009. www.eiu.com

80 Economic Intelligence Unit Forecast : Data Tools

- The young population of Saudi Arabia will influence spending patterns,
- The current foot and mouth disease ban, and the Rift Valley Fever ban, that Saudi Arabia has on meat and meat products/life animals imported from SA is barrier to trade,
- Saudi Arabia is not reluctant to pay good prices for imported goods, but they do **not** compromise on the quality of such goods.

ANNEXES

Annex 1: SA's exports of agricultural products to Saudi Arabia in 2008 (R million) ⁸¹

HS	Description	2002	2003	2004	2005	2006	2007	2008
Total	WTO Agriculture definition @ HS 6-digit	489.236	460.523	442.618	386.699	508.057	462.281	523.050
080510	Oranges, Fresh	143.735	169.153	131.751	111.558	188.910	146.223	189.390
240220	Cigarettes Containing Tobacco	0.000	0.000	0.000	0.000	0.001	56.979	70.541
080550	Lemons And Limes, Fresh Or Dried	45.707	59.262	54.561	52.416	62.538	63.636	54.801
180631	Chocolate & Othr Cocoa Preps, Not Bulk, Filled	3.651	1.955	0.000	0.000	4.340	0.000	44.457
180620	Chocolate Prep Nesoi, In Blocks Etc. Over 2 Kg	60.825	10.659	34.222	64.005	73.185	59.463	37.644
080610	Grapes, Fresh	21.465	20.883	13.846	17.245	18.286	21.603	22.742
080810	Apples, Fresh	17.096	23.852	23.699	18.765	16.545	20.668	21.570
080520	Mandarins (Inc Tanger Etc) & Citrus Hybr Fr Or Dri	6.287	12.278	17.666	11.489	10.601	13.059	15.608
080940	Plums, Prune Plums And Sloes, Fresh	6.974	8.369	6.704	7.174	5.737	10.638	11.652
210390	Sauces Etc. Mixed Condiments And Seasonings Nesoi	0.429	0.039	0.052	0.204	0.328	0.978	5.578
080540	Grapefruit, Fresh Or Dried	0.968	1.843	0.477	0.740	2.384	5.667	4.985
060319	Cut Flowers & Flower Buds, For Bouquets Or Orname	0.000	0.000	0.000	0.000	0.000	1.862	3.954
080930	Peaches, Including Nectarines, Fresh	9.825	11.160	4.312	3.054	2.327	4.477	3.771
200969	Grape Juice, Nesoi, Nt Fortified With Vitamins/Min	3.417	2.855	1.645	2.413	2.297	0.788	3.366
230990	Animal Feed Prep Except Dog Or Cat Food, Retail Pk	0.000	0.000	0.000	0.000	0.000	0.000	3.109
200979	Apple Juice, Nesoi, Nt Fortified W Vitamins, Unferm	3.206	4.335	3.234	3.744	1.311	0.125	2.729
180690	Cocoa Preparations, Not In Bulk Form, Nesoi	0.000	14.624	0.018	0.000	0.000	0.000	2.721
170490	Sugar Confection (Incl Wh Choc), No Cocoa, Nesoi	5.043	6.133	3.309	3.309	2.317	1.957	2.666
080450	Guavas, Mangoes And Mangosteens, Fresh Or Dried	1.853	4.802	3.231	3.238	1.222	2.289	2.443
120921	Alfalfa (Lucerne) Seed For Sowing	0.000	0.000	0.000	0.000	0.000	0.000	2.005
080820	Pears And Quinces, Fresh	1.816	0.752	0.657	0.965	1.035	1.281	1.894
200892	Fruit Mixtures, Prepared Or Preserved Nesoi	2.415	2.620	5.355	2.716	1.796	1.349	1.393
060499	Foliages, Branches Etc Drid/Dyed/Blachd/Impreg Etc	0.257	0.324	0.248	0.050	0.000	0.000	1.290
160232	Prepared Or Preserved Chicken Meat Or Offal, Nesoi	0.000	0.000	9.517	29.688	34.034	37.738	1.175
120929	Seeds Of Forage Plants For Sowing, Nesoi	0.035	0.000	0.252	0.004	0.000	0.000	1.132
080910	Apricots, Fresh	5.965	3.917	1.532	1.295	0.367	1.235	1.105
080440	Avocados, Fresh Or Dried	0.053	0.000	0.000	0.000	0.000	0.117	0.954
081090	Fruit Nesoi, Fresh	0.625	1.435	0.985	0.692	0.120	0.489	0.821
080430	Pineapples, Fresh Or Dried	0.995	0.830	0.752	0.257	0.400	0.448	0.772

060290	Live Plants, Cuttings & Slips,Nesoi;Mushroom Spawn	0.133	0.232	0.132	0.497	0.167	0.300	0.730
200990	Mixtures Of Fruit And/Or Vegetable Juices	1.419	0.965	0.119	0.267	0.380	0.354	0.681
200980	Juice Of Any Single Fruit/Vegtble Unfermentd Nesoi	0.000	0.165	0.162	0.996	0.757	0.502	0.667
210500	Ice Cream And Other Edible Ice, With Cocoa Or Not	0.000	0.000	0.000	0.000	0.000	0.000	0.649
060390	Cut Flowers/Buds Dried, Dyed Or Otherwise Prepared	0.113	0.000	0.000	0.013	0.000	0.557	0.544
140190	Vegetable Materials Primarily For Plaiting, Nesoi	0.101	0.164	0.000	0.010	0.000	0.465	0.438
010619	Mammals, Live, Nesoi	0.098	0.005	0.002	0.008	0.000	1.924	0.425
091099	Spices, Nesoi	0.000	0.003	0.057	0.055	0.027	0.067	0.419
230320	Beet-Pulp, Bagasse And Other Waste Of Sugar Mfr	0.000	0.000	0.000	0.000	0.000	0.000	0.409
200870	Peaches, Prepared Or Preserved, Nesoi	0.754	1.421	1.792	1.268	0.565	0.009	0.375
200929	Grapefruit Juice,Nesoi,Nt Fortorified W Vitamins	0.000	0.044	0.058	0.184	0.188	0.612	0.202
200949	Pineapple Juice, Nt Fort., Unfermnt, Nesoi	0.000	0.015	0.023	0.061	0.069	0.065	0.188
200919	Orange Juice, Other Than Frozen, Sweetened Or Not	0.049	0.016	0.048	0.095	0.100	0.074	0.151
190590	Bread, Pastry, Cakes, Etc Nesoi & Puddings	0.003	0.000	0.000	0.000	0.001	0.000	0.128
080410	Dates, Fresh Or Dried	0.000	0.000	0.000	0.000	0.000	0.014	0.128
060491	Foliage, Branches Etc, Fresh	0.075	0.000	0.000	0.000	0.000	0.036	0.111
160250	Prepared Or Preserved Bovine Meat Etc. Nesoi	0.000	0.000	11.518	17.536	6.947	0.774	0.105
080720	Papayas (Papaws), Fresh	0.001	0.000	0.002	0.000	0.000	0.005	0.076
080590	Citrus Fruits, Inc Kumquats, Nesoi, Fresh Or Dried	1.679	0.379	0.253	0.242	0.193	0.000	0.052
210690	Food Preparations Nesoi	12.123	3.821	0.055	0.079	0.146	0.413	0.046
190219	Pasta, Uncooked, Not Stuffed Etc., Nesoi	0.000	0.000	0.000	0.000	0.000	0.000	0.035
120999	Seeds, Fruit And Spores Used For Sowing, Nesoi	0.082	0.000	0.000	0.000	0.000	0.000	0.032
060314	Cut Chrysanthemums & Buds, For Bouquets Or Orname	0.000	0.000	0.000	0.000	0.000	0.001	0.026
170191	Cane/Beet Sugar, Refined, Solid, Added Flav/Color	0.000	0.000	0.000	0.000	0.000	0.000	0.023
020890	Meat & Edible Meat Offal Nesoi, Fresh, Chld, Froz	0.000	0.013	0.000	0.000	0.000	0.000	0.020
151000	Olive-Residue Oil & Blends (1509&1510) Nt Chem Mod	0.000	0.000	0.000	0.000	0.000	0.000	0.020
200840	Pears, Prepared Or Preserved, Nesoi	0.319	0.473	0.149	0.000	0.161	0.585	0.017
080711	Watermelons, Fresh	0.000	0.000	0.000	0.000	0.000	0.000	0.015
081050	Kiwi Fruit (Chinese Gooseberries) Fresh	0.000	0.000	0.000	0.000	0.000	0.000	0.015
070990	Vegetables, Nesoi, Fresh Or Chilled	0.000	0.001	0.000	0.000	0.005	0.000	0.009
080920	Cherries, Sweet Or Tart, Fresh	0.012	0.009	0.001	0.008	0.032	0.001	0.008
070420	Brussels Sprouts, Fresh Or Chilled	0.000	0.000	0.000	0.000	0.000	0.000	0.005
200820	Pineapples, Prepared Or Preserved Nesoi	0.000	0.000	0.000	0.000	0.000	0.000	0.005
081110	Strawberries, Uncooked/Cooked By Water, Frozen	0.000	0.000	0.000	0.000	0.000	0.000	0.005
020130	Meat Of Bovine Animals, Boneless, Fresh Or Chilled	0.000	1.051	0.189	0.000	0.000	0.000	0.004
071080	Vegetables, Nesoi Raw/Cooked By Boiling, Frozen	0.000	0.001	0.000	0.000	0.000	0.000	0.004

050790	Tortoise-Shell, Whalebone Nails Etc, Powder, Waste	0.000	0.000	0.000	0.000	0.000	0.000	0.003
140110	Bamboos Used Primarily For Plaiting	0.000	0.000	0.000	0.000	0.000	0.225	0.002
021020	Meat, Bovine Animals, Salted, In Brine, Drd, Smokd	0.000	0.000	0.000	0.000	0.000	0.000	0.002
200819	Nuts (Exc Peanuts) And Seeds, Prepared Etc. Nesoi	0.000	0.000	0.000	0.000	0.000	0.000	0.001
040610	Cheese (Unrpd/Uncurd) Frsh Incl Whey Cheese Curd	0.000	0.000	0.000	0.000	0.000	0.000	0.001
020220	Meat, Bovine Cuts With Bone In, Frozen	0.092	0.255	0.000	0.000	0.000	0.000	0.001
071090	Vegetables Mixtures, Raw/Cooked By Boiling, Frozen	0.168	0.000	0.000	0.000	0.000	0.000	0.001
070951	Mushrooms, Fresh Or Chilled	0.000	0.000	0.000	0.000	0.000	0.000	0.001
070200	Tomatoes, Fresh Or Chilled	0.000	0.001	0.000	0.000	0.000	0.000	0.001
081010	Strawberries, Fresh	0.000	0.000	0.000	0.000	0.000	0.000	0.000
081320	Prunes, Dried	0.000	0.000	0.000	0.000	0.000	0.000	0.000
070810	Peas (Pisum Sativum), Fresh Or Chilled	0.000	0.000	0.001	0.000	0.000	0.000	0.000
070190	Potatoes, Except Seed, Fresh Or Chilled, Nesoi	0.000	0.000	0.000	0.000	0.000	0.000	0.000
070820	Beans (Vigna Spp., Phaseolus Spp.) Fresh Or Chlld	0.000	0.000	0.000	0.000	0.000	0.000	0.000
070410	Cauliflower And Headed Broccoli, Fresh Or Chilled	0.000	0.000	0.000	0.000	0.000	0.000	0.000
081020	Raspberries/Blckberries/Mulberries/Loganberrs Frsh	0.000	0.000	0.000	0.000	0.000	0.000	0.000
330119	Essential Oils Of Citrus Fruit, Nesoi	0.000	0.000	0.000	0.000	0.000	0.000	0.000
050510	Down For Stuffing Cleaned/Disinfect Treat For Pres	0.000	0.000	0.000	0.001	0.000	0.000	0.000
071159	Mushrooms/Truffles,Prov. Preserved, Inedible,Nesoi	0.000	0.000	0.000	0.000	0.000	0.000	0.000
210610	Protein Concentrates & Textured Protein Substances	0.000	0.000	0.032	0.332	0.000	0.000	0.000

Annex 2: Description of the Trade Potential Index ⁸²

The Trade Potential Index uses a scoring system based on data obtained from the Trade Map database. This allows the analysis to focus on trade potential whilst taking cognizance of import demand, import trends, growth rates and unit values rather than focusing solely on trade potential values. A score of either 1 or 0 is assigned to five of the trade indicators contained in the database. This score is then aggregated to give a total score, which is measured against a final score of 5. A score of 0 would therefore represent the lowest end of the scale and the least trade potential whilst a score of 5 would indicate the greatest trade potential.

The criteria for scoring are as follows:

- The value of imports from a country: If trade in the form of exports by SA to Saudi Arabia did exist in 2007, a score of 1 is allocated. The absence of trade is allocated a score of 0. The existence of a trade relationship is deemed a significant factor in furthering trade.
- Growth in export demand: If exports from SA to Saudi Arabia have registered a positive growth measured over the five year period from 2003 to 2007, a score of 1 is allocated. No growth or negative growth rates are awarded a score of 0.
- Growth in import demand: If imports by Saudi Arabia from the rest of the world have registered a positive growth measured over the five year period from 2003 to 2007, a score of 1 is allocated. No growth or negative growth rates are awarded a score of 0.
- Export growth: Growth of exports from SA to the rest of the world is indicative of supply capacity, and increased demand for locally produced goods. A positive growth rate in the value of exports over a five year period from 2003 to 2007 is awarded a score of 1, whilst no or negative growth is awarded a score of 0.
- Indicative Trade Potential: Indicative trade potential isolates total demand and total export capacity thereby providing a rough estimate of how much countries could 'theoretically' trade between them. A positive 'indicative trade potential' suggests that a trade opportunity exists. A threshold value of US\$ 200 000 is set for the allocation of a score of 1. Trade potential with a lower value or with no or negative trade potential values are allocated a score of 0.

Annex 3: Trade Potential Index (TPI), existing and potential trade (Indicative Trade Potential - ITP) between South Africa and Saudi Arabia in 2007 (US\$ 000) ⁸³

HS Code	Product Description	SA Exports to Saudi (2007)	Saudi Imports from the World (2007)	SA Exports to World (2007)	ITP (2007)	Final TPI Score *	Did SA export to Saudi in 2007?	Is SA export to Saudi growing? AVG /year 03-07	Is Saudi Imports from World growing? AVG /year 03-07	Is SA export to World growing? AVG /year 03-07	Is indicative potential trade larger than US\$ 200 000 in 2007 ?
'080510	Oranges, fresh or dried	20 325	117 582	390 870	97 257	5	1	1	1	1	1
'210690	Food preparations nes	59	444 800	69 732	69 673	5	1	1	1	1	1
'240220	Cigarettes containing tobacco	7 691	472 681	69 826	62 135	5	1	1	1	1	1
'210390	Sauces and preparations nes and mixed condiments and mixed seasonings	139	46 165	24 917	24 778	5	1	1	1	1	1
'200990	Mixtures of juices unfermentd¬ spiritd whether o not sugard o sweet	50	42 233	22 659	22 609	5	1	1	1	1	1
'200980	Fruit&veg juice nes (exc mx) unferment unspirtd,whether/not sug/sweet	71	64 079	21 248	21 177	5	1	1	1	1	1
'080550	Fresh or dried lemons "Citrus limon, Citrus limonum" and limes "Citrus	8 804	25 066	54 481	16 262	5	1	1	1	1	1
'080610	Grapes, fresh	3 074	18 808	313 140	15 734	5	1	1	1	1	1
'080520	Mandarins(tang&sats)clementines&wilkg&sim citrus hybrids,fresh/drid	1 813	14 912	60 488	13 099	5	1	1	1	1	1
'080820	Pears and quinces, fresh	182	10 968	118 388	10 786	5	1	1	1	1	1
'091099	Spices nes	10	21 231	5 880	5 870	5	1	1	1	1	1
'200949	Pineapple juice, unfermented, Brix value > 20 at 20°C, whether or not	9	5 060	12 527	5 051	5	1	1	1	1	1
'080940	Plums and sloes, fresh	1 514	6 422	35 824	4 908	5	1	1	1	1	1
'180620	Chocolate&other food preparations containg cocoa weighg more than 2 kg	8 165	66 791	10 981	2 816	5	1	1	1	1	1
'010619	Live mammals (excl. primates, whales, dolphins and purpoises "mammals	274	36 270	2 048	1 774	5	1	1	1	1	1
'160232	Fowl (gallus domesticus) meat,	5 382	11 888	7 056	1 674	5	1	1	1	1	1

⁸³ As adapted: Trade Map

	prepared/preserved										
'080410	Dates, fresh or dried	2	893	4 452	891	5	1	1	1	1	1
'200929	Grapefruit juice, unfermented, Brix value > 20 at 20°C, whether or not	87	839	21 702	752	5	1	1	1	1	1
'190490	Cereals,exc maize (corn),in grain form,pre-cookd or otherwise preparad	7	730	3 406	723	5	1	1	1	1	1
'080440	Avocados, fresh or dried	33	679	27 847	646	5	1	1	1	1	1
'121490	Swedes,mangold,fodder root,hay,clover,sainfoin,forag kale,etc	29	371	306	277	5	1	1	1	1	1
'080810	Apples, fresh	2 941	111 615	212 662	108 674	4	1	0	1	1	1
'200979	Apple juice, unfermented, Brix value > 20 at 20°C, whether or not cont	18	23 729	14 922	14 904	4	1	0	1	1	1
'170490	Sugar confectionery nes (includg white chocolate),not containg cocoa	291	51 402	10 640	10 349	4	1	0	1	1	1
'081090	Fruits, fresh nes	70	8 350	14 667	8 280	4	1	1	1	0	1
'200919	Orange juice&nes,unfermentd not spiritd,whether or not sugard or sweet	10	17 165	8 049	8 039	4	1	1	0	1	1
'090240	Black tea (fermented) & partly fermented tea in packages exceedg 3 kg	157	29 357	8 013	7 856	4	1	1	0	1	1
'060491	Foliage,branch&pts of plant w/o flo/bud,grass,for bouquets&orn purp,fr	5	4 653	5 565	4 648	4	1	1	1	0	1
'200969	Grape juice, incl. grape must, unfermented, Brix value > 30 at 20°C, w	112	3 655	11 203	3 543	4	1	0	1	1	1
'080430	Pineapples, fresh or dried	64	2 945	4 039	2 881	4	1	0	1	1	1
'091091	Mixtures of two/more of the prods of different headgs to this chapter	1	13 484	2 754	2 753	4	1	0	1	1	1
'080540	Grapefruit, fresh or dried	264	2 524	99 609	2 260	4	1	1	0	1	1
'200892	Fruit mixtures nes,o/w prep o presvd,whether o not sugard,sweet o spir	192	2 278	29 120	2 086	4	1	1	1	0	1
'160250	Bovine meat and meat offal nes,excluding livers, prepared or preserved	110	2 523	1 437	1 327	4	1	0	1	1	1
'080910	Apricots, fresh	176	1 365	3 774	1 189	4	1	1	0	1	1
'090412	Pepper of the genus Piper, except cubeb pepper, crushed or ground	2	1 965	1 126	1 124	4	1	0	1	1	1
'060210	Cuttings and slips, unrooted	35	601	8 524	566	4	1	0	1	1	1
'060390	Cut flowers&flower buds for bouquets or ornamental purposes,ex fresh	79	436	4 015	357	4	1	1	0	1	1
'060290	Plants live, nes	43	161	5 394	118	4	1	1	1	1	0
'080720	Papaws (papayas), fresh	1	653	115	114	4	1	1	1	1	0
'200840	Pears nes,o/w prep or presvd whether or not	83	178	24 969	95	4	1	1	1	1	0

	sugared,sweetened,spirited										
'140110	Bamboos used primarily for plaiting	32	40	242	8	4	1	1	1	1	0
'160220	Livers of any animal prepared or preserved	56	57	86	1	4	1	1	1	1	0
'060319	Fresh cut flowers and buds, of a kind suitable for bouquets or for orn	265	152	12 636	-113	4	1	1	1	1	0
'170111	Raw sugar, cane	0	278 774	92 870	92 870	3	0	0	1	1	1
'170199	Refined sugar, in solid form, nes	0	113 654	74 549	74 549	3	0	0	1	1	1
'100590	Maize (corn) nes	0	461 410	15 808	15 808	3	0	0	1	1	1
'230120	Flour,meal&pellet of fish,crust,mol/oth aqua invert,unfit human cons	0	14 579	25 774	14 579	3	0	0	1	1	1
'210500	Ice cream and other edible ice, whether or not containing cocoa	0	36 229	11 889	11 889	3	0	0	1	1	1
'210410	Soups and broths and preparations thereof	0	11 565	16 373	11 565	3	0	0	1	1	1
'200190	Veg,fruit,nut&edible prts of plants nes,prep/presvd by vin/acetic acid	0	28 923	11 452	11 452	3	0	0	1	1	1
'120991	Seeds, vegetable, nes for sowing	0	12 396	11 018	11 018	3	0	0	1	1	1
'070310	Onions and shallots, fresh or chilled	0	39 172	9 324	9 324	3	0	0	1	1	1
'210210	Yeasts, active	0	8 939	9 383	8 939	3	0	0	1	1	1
'190110	Prep of cereals,flour,starch/milk f infant use,put up f retail sale	0	231 953	8 893	8 893	3	0	0	1	1	1
'151219	Sunflower-sed/safflower oil&their fractions refind but nt chem modifid	0	36 844	8 707	8 707	3	0	0	1	1	1
'010290	Bovine, live except pure-bred breeding	0	26 097	8 594	8 594	3	0	0	1	1	1
'230990	Animal feed preparations nes	0	48 457	8 532	8 532	3	0	0	1	1	1
'200911	Orange juice,unfermentd¬ spiritd,whether not sugard sweet,frozen	0	37 933	7 909	7 909	3	0	0	1	1	1
'080620	Grapes, dried	0	7 803	55 792	7 803	3	0	0	1	1	1
'080450	Guavas, mangoes and mangosteens, fresh or dried	326	27 706	7 917	7 591	3	1	0	1	0	1
'020130	Bovine cuts boneless, fresh or chilled	0	28 223	7 087	7 087	3	0	0	1	1	1
'160420	Fish prepared or preserved, except whole or in pieces	0	6 742	9 492	6 742	3	0	0	1	1	1
'121190	Plants &pts of plants(incl sed&fruit) usd in pharm,perf,insect etc nes	0	12 344	6 734	6 734	3	0	0	1	1	1
'151620	Veg fats &oils&fractions hydrogenatd,inter/re-esterifid,etc,ref'd/not	0	32 145	6 325	6 325	3	0	0	1	1	1
'070190	Potatoes, fresh or chilled nes	0	6 323	9 793	6 323	3	0	0	1	1	1
'081190	Fruits&edible nuts uncook,steam/boil (water) sweetend/not,frozen,nes	0	5 821	7 544	5 821	3	0	0	1	1	1
'200870	Peaches nes,o/w prep o presvd whether o not	1	5 608	57 399	5 607	3	1	0	1	0	1

	sugard,sweetend o spiritd										
'330129	Essential oils, nes	0	23 932	5 319	5 319	3	0	0	1	1	1
'080290	Nuts edible, fresh or dried, whether or not shelled or peeled, nes	0	5 034	26 360	5 034	3	0	0	1	1	1
'190590	Communion wafers,empty cachets f pharm use&sim prod&bakers' wares nes	0	83 713	4 974	4 974	3	0	0	1	1	1
'040210	Milk powder not exceeding 1.5% fat	0	188 635	4 620	4 620	3	0	0	1	1	1
'200899	Fruits&oth edible pts of plants nes,prep/presvd,sug,sweet/spir/not	0	4 562	24 453	4 562	3	0	0	1	1	1
'121299	Vegetable products nes used primarily for human consumption	0	4 468	25 143	4 468	3	0	0	1	1	1
'080930	Peaches, including nectarines, fresh	637	5 097	10 687	4 460	3	1	0	0	1	1
'230910	Dog or cat food put up for retail sale	0	4 423	5 629	4 423	3	0	0	1	1	1
'190410	Prep foods obtained by the swellg o roastg of cereal o cereal products	0	31 036	4 291	4 291	3	0	0	1	1	1
'090111	Coffee, not roasted, not decaffeinated	0	74 440	4 124	4 124	3	0	0	1	1	1
'040299	Milk and cream nes sweetened	0	135 030	3 986	3 986	3	0	0	1	1	1
'180632	Choc&food prep cntg cocoa in blocks,slabs/bars,not filld,not over 2 kg	0	45 657	3 974	3 974	3	0	0	1	1	1
'020890	Meat and edible meat offal, nes fresh, chilled or frozen	0	3 874	55 086	3 874	3	0	0	1	1	1
'020230	Bovine cuts boneless, frozen	0	144 898	3 507	3 507	3	0	0	1	1	1
'040690	Cheese nes	0	128 752	3 373	3 373	3	0	0	1	1	1
'210610	Protein concentrates and textured protein substances	0	3 673	3 353	3 353	3	0	0	1	1	1
'151590	Veg fats&oils nes&their fractions,refind or not but not chemically mod	0	7 838	3 215	3 215	3	0	0	1	1	1
'071080	Vegetables, frozen nes	0	3 745	3 099	3 099	3	0	0	1	1	1
'170410	Chewing gum containing sugar, except medicinal	0	9 545	2 877	2 877	3	0	0	1	1	1
'010190	Live horses, asses, mules and hinnies (excl. pure-bred for breeding)	0	2 861	6 666	2 861	3	0	0	1	1	1
'081340	Fruits, dried nes	0	2 850	4 262	2 850	3	0	0	1	1	1
'090411	Pepper of the genus Piper,ex cubeb pepper,neither crushd nor ground	0	2 770	4 488	2 770	3	0	0	1	1	1
'010110	Pure-bred breeding horses and asses	0	6 793	2 694	2 694	3	0	0	1	1	1
'330119	Essential oils of citrus fruits, nes	0	3 772	2 635	2 635	3	0	0	1	1	1
'200971	Apple juice, unfermented, Brix value <= 20 at 20°C, whether or not con	0	2 584	4 752	2 584	3	0	0	1	1	1
'130219	Vegetable saps and extracts nes	0	2 498	2 746	2 498	3	0	0	1	1	1
'070110	Potatoes seed, fresh or chilled	0	20 654	2 473	2 473	3	0	0	1	1	1

'190190	Malt extract&food prep of Ch 19 <50% cocoa&hd 0401 to 0404 < 10% cocoa	0	9 251	2 386	2 386	3	0	0	1	1	1
'070610	Carrots and turnips, fresh or chilled	0	4 630	2 287	2 287	3	0	0	1	1	1
'220290	Non-alcoholic beverages nes,excludg fruit/veg juices of headg No 20.09	0	106 297	2 172	2 172	3	0	0	1	1	1
'100630	Rice, semi-milled or wholly milled, whether or not polished or glazed	0	592 093	2 157	2 157	3	0	0	1	1	1
'040130	Milk and cream not concentrated and unsweetened exceeding 6% fat	0	34 954	2 083	2 083	3	0	0	1	1	1
'060311	Fresh cut roses and buds, of a kind suitable for bouquets or for ornam	0	6 111	2 082	2 082	3	0	0	1	1	1
'240310	Smokg tobacco,whether o not cntg tobacco substitutes in any proportion	0	2 020	54 297	2 020	3	0	0	1	1	1
'230400	Soya-bean oil-cake&oth solid residues,whether or not ground or pellet	0	225 490	1 947	1 947	3	0	0	1	1	1
'160419	Fish nes, prepared or preserved, whole or in pieces, but not minced	0	5 245	1 899	1 899	3	0	0	1	1	1
'040510	Butter	0	67 512	1 774	1 774	3	0	0	1	1	1
'010420	Goats, live	0	61 130	1 685	1 685	3	0	0	1	1	1
'350510	Dextrins and other modified starches	0	5 880	1 680	1 680	3	0	0	1	1	1
'071010	Potatoes, frozen	0	2 633	1 662	1 662	3	0	0	1	1	1
'180631	Choc&food prep cntg cocoa in blocks,slabs/bars,filld,not exceedg 2 kg	0	67 172	1 640	1 640	3	0	0	1	1	1
'110423	Maize (corn), hulled, pearled, sliced or kibbled	0	1 623	5 350	1 623	3	0	0	1	1	1
'220720	Ethyl alcohol and other spirits, denatured, of any strength	0	1 610	18 421	1 610	3	0	0	1	1	1
'070200	Tomatoes, fresh or chilled	0	55 906	1 558	1 558	3	0	0	1	1	1
'060110	Bulbs, tubers, tuberous roots, corms, crowns and rhizomes, dormant	0	1 510	5 287	1 510	3	0	0	1	1	1
'090190	Coffee husks and skins, coffee substitutes	0	5 537	1 493	1 493	3	0	0	1	1	1
'040410	Whey whether or not concentrated or sweetened	0	7 158	1 482	1 482	3	0	0	1	1	1
'060499	Foliage,branch,etc w/o flowers/buds&grass for bouquet/orn purp exc fr	0	1 419	6 693	1 419	3	0	0	1	1	1
'200599	Vegetables and mixtures of vegetables, prepared or preserved otherwise	0	28 303	1 412	1 412	3	0	0	1	1	1
'220900	Vinegar and substitutes for vinegar obtained from acetic acid	0	1 789	1 407	1 407	3	0	0	1	1	1
'160100	Sausage&sim prod of meat,meat offal/blood&food prep basd on these prod	0	9 565	1 402	1 402	3	0	0	1	1	1
'020120	Bovine cuts bone in, fresh or chilled	0	1 395	1 891	1 395	3	0	0	1	1	1

'120890	Flours and meals of oil seeds or oleaginous fruits,except mustard, nes	0	1 369	3 108	1 369	3	0	0	1	1	1
'210320	Tomato ketchup and other tomato sauces	0	24 451	1 357	1 357	3	0	0	1	1	1
'020442	Sheep cuts, bone in, frozen	0	74 760	1 342	1 342	3	0	0	1	1	1
'180610	Cocoa powder, containing added sugar or other sweetening matter	0	6 506	1 326	1 326	3	0	0	1	1	1
'090230	Black tea (fermented)&partly fermentd tea in packages not exceedg 3 kg	0	124 868	1 266	1 266	3	0	0	1	1	1
'071090	Mixtures of vegetables, frozen	0	6 053	1 220	1 220	3	0	0	1	1	1
'190120	Mixes & doughs for the prep of bakers' wares of heading No 19.05, nes	0	13 235	1 206	1 206	3	0	0	1	1	1
'151800	Animal/veg fats&oils&fract build oxid,etc,& ind mix/prep nes ex 15.16	0	1 197	2 720	1 197	3	0	0	1	1	1
'220110	Mineral&aerated waters not cntg sugar or sweeteng matter nor flavoured	0	12 992	1 194	1 194	3	0	0	1	1	1
'350300	Gelatin and gelatin derivs; isinglass; glues of animal origin, nes	0	2 000	1 151	1 151	3	0	0	1	1	1
'200310	Mushrooms prepared or preserved other than by vinegar or acetic acid	0	3 674	1 042	1 042	3	0	0	1	1	1
'100700	Grain sorghum	0	1 038	1 296	1 038	3	0	0	1	1	1
'040390	Buttermilk,curdled milk & cream,kephir & ferm or acid milk & cream nes	0	25 567	1 026	1 026	3	0	0	1	1	1
'090121	Coffee, roasted, not decaffeinated	0	4 671	1 025	1 025	3	0	0	1	1	1
'330190	Conc&aqueous distls of essentl oils;terpenic by-prods of essentl oils	0	3 146	1 011	1 011	3	0	0	1	1	1
'190219	Uncooked pasta, not stuffed or otherwise prepared, nes	0	23 274	1 009	1 009	3	0	0	1	1	1
'200811	Ground-nuts nes o/w prep or presvd,sugared,sweetened,spirited or not	0	12 714	1 009	1 009	3	0	0	1	1	1
'110510	Potato flour and meal	0	12 075	994	994	3	0	0	1	1	1
'240110	Tobacco, unmanufactured, not stemmed or stripped	0	969	9 848	969	3	0	0	1	1	1
'190420	Prepared foods of unroasted cereal flakes, mixtures	0	934	2 003	934	3	0	0	1	1	1
'200850	Apricots nes,o/w prep o presvd whether o not sugard,sweetend o spiritd	0	899	24 682	899	3	0	0	1	1	1
'520100	Cotton, not carded or combed	0	896	6 012	896	3	0	0	1	1	1
'151311	Coconut (copra) oil crude	0	1 182	871	871	3	0	0	1	1	1
'120600	Sunflower seeds, whether or not broken	0	837	1 335	837	3	0	0	1	1	1
'071420	Sweet potatoes, fresh or dried, whether or not sliced or pelleted	0	797	784	784	3	0	0	1	1	1

'051110	Semen bovine	0	4 427	773	773	3	0	0	1	1	1
'240210	Cigars, cheroots and cigarillos, containing tobacco	0	771	1 251	771	3	0	0	1	1	1
'081350	Mixtures of edible nuts or dried fruits of this chapter	0	768	796	768	3	0	0	1	1	1
'200559	Beans nes prepar'd or preserv'd,o/t by vinegar or acetic acid,not frozen	0	762	773	762	3	0	0	1	1	1
'240399	Tobacco extracts and essences	0	16 231	749	749	3	0	0	1	1	1
'200830	Citrus fruits nes,o/w prep or presvd,sugared,sweetened,spirited or not	0	5 091	724	724	3	0	0	1	1	1
'350190	Casein glues; caseinates and other casein derivatives	0	1 009	716	716	3	0	0	1	1	1
'110313	Maize (corn) groats and meal	0	714	4 177	714	3	0	0	1	1	1
'121220	Seaweeds and other algae, fresh or dried whether or not ground	0	911	708	708	3	0	0	1	1	1
'070960	Peppers of the genus Capsicum or of the genus Pimenta,fresh or chilled	0	5 255	705	705	3	0	0	1	1	1
'040630	Cheese processed, not grated or powdered	0	222 762	697	697	3	0	0	1	1	1
'170112	Raw sugar, beet	0	686	107 898	686	3	0	0	1	1	1
'130190	Natural gums, resins, gum-resins and balsam, except arabic gum	0	12 989	684	684	3	0	0	1	1	1
'010210	Bovine, live pure-bred breeding	0	34 575	675	675	3	0	0	1	1	1
'200210	Tomatoes,whole/in pieces prepar'd/preserv'd o/t by vinegar/acetic acid	0	7 878	667	667	3	0	0	1	1	1
'020110	Bovine carcasses and half carcasses, fresh or chilled	0	7 121	643	643	3	0	0	1	1	1
'100110	Durum wheat	0	605	4 361	605	3	0	0	1	1	1
'080711	Watermelons, fresh	0	1 409	590	590	3	0	0	1	1	1
'060220	Trees, edible fruit or not, shrubs and bushes, grafted or not	0	945	576	576	3	0	0	1	1	1
'150910	Olive oil, virgin	0	15 728	575	575	3	0	0	1	1	1
'090122	Coffee, roasted, decaffeinated	0	816	555	555	3	0	0	1	1	1
'170219	Lactose and lactose syrup, <99% lactose on dry matter	0	538	1 088	538	3	0	0	1	1	1
'130232	Mucilages & thickeners derived from locust beans & seeds or guar seeds	0	1 589	529	529	3	0	0	1	1	1
'100610	Rice in the husk (paddy or rough)	0	26 688	525	525	3	0	0	1	1	1
'120929	Seeds of forage plants, except beet seeds, for sowing nes	0	3 934	524	524	3	0	0	1	1	1
'150790	Soya-bean oil and its fractions, refined but not	0	6 465	511	511	3	0	0	1	1	1

	chemically modified										
'150200	Bovine,sheep&goat fats,raw/renderd whether/not pressd/solv-extractd	0	503	1 518	503	3	0	0	1	1	1
'160290	Meat, meat offal or blood, prepared or preserved, nes	0	480	540	480	3	0	0	1	1	1
'190230	Pasta nes	0	5 343	479	479	3	0	0	1	1	1
'060120	Bulbs,tubers,corms etc in growth or in flower & chicory plants & roots	0	836	476	476	3	0	0	1	1	1
'040590	Fats and oils derived from milk nes	0	17 657	457	457	3	0	0	1	1	1
'150990	Olive oil and its fractions refined but not chemically modified	0	17 817	455	455	3	0	0	1	1	1
'170191	Refined sugar,in solid form,containg added flavourg or colourg matter	0	428	5 459	428	3	0	0	1	1	1
'190430	Bulgur wheat in the form of worked grains, obtained by cooking hard wh	0	423	889	423	3	0	0	1	1	1
'190220	Stuffed pasta, whether or not cooked or otherwise prepared	0	2 671	410	410	3	0	0	1	1	1
'070511	Cabbage lettuce (head lettuce) fresh or chilled	0	5 170	405	405	3	0	0	1	1	1
'160414	Tunas,skipjack&Atl bonito,prepard/preservd,whole/in pieces,ex mincd	0	71 424	402	402	3	0	0	1	1	1
'200939	Single citrus fruit juice, unfermented, Brix value > 20 at 20°C, wheth	0	400	5 669	400	3	0	0	1	1	1
'190540	Rusks, toasted bread and similar toasted products	0	3 388	393	393	3	0	0	1	1	1
'160590	Molluscs and other aquatic invertebrates prepared or preserved	0	390	2 740	390	3	0	0	1	1	1
'070320	Garlic, fresh or chilled	0	13 106	383	383	3	0	0	1	1	1
'200580	Sweet corn preparad o preservd,o/t by vinegar o acetic acid not frozen	0	6 456	380	380	3	0	0	1	1	1
'100400	Oats	0	2 639	379	379	3	0	0	1	1	1
'160300	Extracts&juices of meat,fish,or crust,molluscs/oth aquatic invertebr	0	378	2 458	378	3	0	0	1	1	1
'200941	Pineapple juice, unfermented, Brix value <= 20 at 20°C, whether or not	0	769	372	372	3	0	0	1	1	1
'151519	Linseed oil and its fractions, refined but not chemically modified	0	1 084	365	365	3	0	0	1	1	1
'200490	Veg nes&mx of veg prep or presvd,o/t by vinegar or acetic acid,frozen	0	6 757	362	362	3	0	0	1	1	1
'210420	Homogenised composite food preparations put up for retail sale	0	7 127	362	362	3	0	0	1	1	1

'210330	Mustard flour and meal and prepared mustard	0	588	342	342	3	0	0	1	1	1
'071040	Sweet corn, frozen	0	7 922	335	335	3	0	0	1	1	1
'200961	Grape juice, incl. grape must, unfermented, Brix value <= 30 at 20°C,	0	1 162	333	333	3	0	0	1	1	1
'170390	Molasses nes	0	327	556	327	3	0	0	1	1	1
'410210	Sheep or lamb skins, raw, with wool on, nes	0	318	18 998	318	3	0	0	1	1	1
'220190	Ice&snow&potable waters nes not cntg sugar or sweeteners nor flavoured	0	1 647	308	308	3	0	0	1	1	1
'100820	Millet	0	1 910	298	298	3	0	0	1	1	1
'070890	Leguminous vegetables, shelled or unshelled, fresh or chilled nes	0	909	297	297	3	0	0	1	1	1
'071320	Chickpeas, dried, shelled, whether or not skinned or split	0	11 878	283	283	3	0	0	1	1	1
'070700	Cucumbers and gherkins, fresh or chilled	0	490	274	274	3	0	0	1	1	1
'380910	Prep w a basis of amylaceous subs f textile,paper,leather/the like,nes	0	6 446	271	271	3	0	0	1	1	1
'150600	Animal fats&oils&their fractions nes refind/not,but not chemically mod	0	361	270	270	3	0	0	1	1	1
'020410	Lamb carcasses and half carcasses, fresh or chilled	0	24 616	265	265	3	0	0	1	1	1
'110419	Cereals, rolled or flaked grains nes	0	15 864	263	263	3	0	0	1	1	1
'020713	Fowls (gallus domesticus), cuts & offal, fresh/chilled	0	2 043	258	258	3	0	0	1	1	1
'200290	Tomatoes nes,prepared or preserved oth than by vinegar or acetic acid	0	31 714	255	255	3	0	0	1	1	1
'140490	Vegetable products nes	0	3 245	240	240	3	0	0	1	1	1
'081020	Raspberries, blackberries, mulberries and loganberries, fresh	0	235	1 353	235	3	0	0	1	1	1
'091010	Ginger	0	7 290	235	235	3	0	0	1	1	1
'071190	Vegetables nes&mixtures provis presvd but nt f immediate consumptn	0	457	226	226	3	0	0	1	1	1
'110811	Wheat, starch	0	687	226	226	3	0	0	1	1	1
'070820	Beans, shelled or unshelled, fresh or chilled	0	832	225	225	3	0	0	1	1	1
'130239	Mucilages&thickeners nes,modifid or not,derivd from vegetable products	0	2 169	220	220	3	0	0	1	1	1
'020727	Turkey, cuts & offal, frozen	0	54 843	218	218	3	0	0	1	1	1
'050800	Coral&sim mat,shellfish shell,cuttl bone,echinoderm unwk unshp pdr&wast	0	266	211	211	3	0	0	1	1	1
'170240	Glucose inc syrup cntg in dry state min 20% but <50% by wt of fructose	0	210	1 753	210	3	0	0	1	1	1

'090220	Green tea (not fermented) in packages exceeding 3 kg	0	3 651	206	206	3	0	0	1	1	1
'020422	Sheep cuts, bone in, fresh or chilled	0	3 968	203	203	3	0	0	1	1	1
'140190	Vegetable materials nes, used primarily for plaiting	66	37	867		3	1	0	1	1	0
'151710	Margarine, excluding liquid margarine	0	23 011	7 265	7 265	2	0	0	1	0	1
'190531	Sweet biscuits	0	77 304	5 982	5 982	2	0	0	1	0	1
'180690	Chocolate and other food preparations containing cocoa nes	0	12 978	5 100	5 100	2	0	0	0	1	1
'200820	Pineapples nes,o/w prep or presvd,sugared,sweetened,spirited or not	0	7 716	4 784	4 784	2	0	0	1	0	1
'100510	Maize (corn) seed	0	4 759	16 676	4 759	2	0	0	1	0	1
'040221	Milk and cream powder unsweetened exceeding 1.5% fat	0	226 424	3 233	3 233	2	0	0	1	0	1
'070990	Vegetables, fresh or chilled nes	0	3 131	4 520	3 131	2	0	0	0	1	1
'160413	Sardines,sardinella&brislg o sprats prep o presvd,whole o pce ex mincd	0	3 030	4 211	3 030	2	0	0	1	0	1
'110100	Wheat or meslin flour	0	3 103	2 424	2 424	2	0	0	1	0	1
'040229	Milk and cream powder sweetened exceeding 1.5% fat	0	55 112	2 365	2 365	2	0	0	1	0	1
'170290	Sugar nes, including invert sugar	0	6 747	2 337	2 337	2	0	0	1	0	1
'200520	Potatoes preparad or preserved,o/t by vinegar or acetic acid,not frozen	0	2 327	2 973	2 327	2	0	0	0	1	1
'120999	Seeds, fruit and spores for sowing, nes	0	2 260	2 983	2 260	2	0	0	1	0	1
'120220	Ground-nuts shelld,whether or not broken,not roastd or otherwise cookd	0	2 254	6 653	2 254	2	0	0	1	0	1
'020220	Bovine cuts bone in, frozen	0	28 866	2 192	2 192	2	0	0	1	0	1
'200710	Homo prep (jams,fruit jellies etc) ckd prep whether/nt sugard/sweetend	0	2 244	2 101	2 101	2	0	0	0	1	1
'020712	Fowls (gallus domesticus), whole, frozen	0	647 847	1 969	1 969	2	0	0	1	0	1
'020714	Fowls (gallus domesticus), cuts & offal, frozen	0	18 368	1 865	1 865	2	0	0	1	0	1
'090420	Fruits of the genus Capsicum or Pimenta, dried, crushed or ground	0	1 774	3 663	1 774	2	0	0	1	0	1
'110812	Maize (corn) starch	0	1 617	5 926	1 617	2	0	0	1	0	1
'010690	Live animals (excl. mammals, reptiles, birds, fish, crustaceans, mollu	0	1 913	1 576	1 576	2	0	0	1	0	1
'080719	Melons, fresh, other than watermelons	0	1 841	1 439	1 439	2	0	0	0	1	1
'200799	Jams,fruit jellies,fruit/nut purée&paste,ckd prep,sugard,sweetend/not	0	13 824	1 417	1 417	2	0	0	1	0	1
'210112	Coffee preparations based on	0	48 617	1 258	1 258	2	0	0	1	0	1

	extract/essence/conc.										
'220710	Undenaturd ethyl alcohol of an alcohol strgth by vol of 80% vol/higher	0	1 056	85 402	1 056	2	0	0	0	1	1
'100640	Rice, broken	0	1 044	1 213	1 044	2	0	0	0	1	1
'200921	Grapefruit juice, unfermented, Brix value <= 20 at 20°C, whether or no	0	952	1 870	952	2	0	0	1	0	1
'120210	Ground-nuts in shell not roasted or otherwise cooked	0	951	3 492	951	2	0	0	1	0	1
'151190	Palm oil and its fractions refined but not chemically modified	0	102 973	894	894	2	0	0	1	0	1
'040110	Milk not concentrated and unsweetened not exceeding 1% fat	0	24 050	889	889	2	0	0	0	1	1
'071290	Vegetables and mixtures dried, but not further prepared nes	0	773	1 177	773	2	0	0	1	0	1
'180500	Cocoa powder, not containing added sugar or other sweetening matter	0	5 040	717	717	2	0	0	0	1	1
'151790	Edible mx/prep of animal/veg fats&oils/of fractions ex hd No 15.16	0	1 372	711	711	2	0	0	1	0	1
'350520	Glues based on starches, on dextrans or other modified starches, nes	0	7 480	695	695	2	0	0	1	0	1
'070410	Cauliflowers and headed broccoli, fresh or chilled	0	695	664	664	2	0	0	0	1	1
'200912	Orange juice, unfermented, Brix value <= 20 at 20°C, whether or not co	0	3 442	596	596	2	0	0	0	1	1
'090210	Green tea (not fermented) in packages not exceeding 3 kg	0	1 439	519	519	2	0	0	0	1	1
'200600	Fruit,nut,fruit-peel&pts of plant presvd by sugar (draind,glacé/cryst)	0	850	489	489	2	0	0	0	1	1
'200819	Nuts&seeds nes incl mx,o/w prep o presvd,sugard,sweetend,spiritd o not	0	8 322	440	440	2	0	0	1	0	1
'040610	Cheese, fresh (including whey cheese) unfermented, and curd	0	12 032	438	438	2	0	0	1	0	1
'150500	Wool grease and fatty substances derived therefrom, incl. lanolin	0	569	431	431	2	0	0	1	0	1
'190211	Uncooked pasta not stuffed or otherwise prepared, containing eggs	0	9 287	422	422	2	0	0	1	0	1
'210111	Coffee extracts, essences, concentrates	0	411	630	411	2	0	0	1	0	1
'210220	Yeasts, inactive and other dead singlecell micro-organisms	0	12 649	383	383	2	0	0	1	0	1
'110220	Maize (corn) flour	0	376	4 559	376	2	0	0	0	1	1
'081310	Apricots, dried	0	371	3 165	371	2	0	0	1	0	1
'152000	Glycerol crude, waters and lyes	0	2 690	345	345	2	0	0	1	0	1

'071333	Kidney beans&white pea beans drid shelld,whether o not skinnd o split	0	2 391	336	336	2	0	0	1	0	1
'070420	Brussels sprouts, fresh or chilled	0	313	706	313	2	0	0	0	1	1
'021099	Meat and edible offal, salted, in brine, dried or smoked, and edible f	0	310	585	310	2	0	0	0	1	1
'120810	Soya bean flour and meals	0	302	385	302	2	0	0	1	0	1
'210120	Tea or maté extracts,essences & concentrates & preparations thereof	0	2 533	282	282	2	0	0	1	0	1
'230230	Wheat bran, sharps and other residues, pelleted or not	0	6 810	276	276	2	0	0	1	0	1
'081050	Kiwifruit, fresh	0	9 233	274	274	2	0	0	1	0	1
'200931	Single citrus fruit juice, unfermented, Brix value <= 20 at 20°C, whet	0	1 235	254	254	2	0	0	0	1	1
'080111	Coconuts, dessicated	0	2 708	194	194	2	0	0	1	1	0
'210310	Soya sauce	0	2 398	187	187	2	0	0	1	1	0
'070920	Asparagus, fresh or chilled	0	185	337	185	2	0	0	1	1	0
'110290	Cereal flour nes	0	443	185	185	2	0	0	1	1	0
'200410	Potatoes prepard or preservd oth than by vinegar or acetic acid,frozen	0	90 592	181	181	2	0	0	1	1	0
'020430	Lamb carcasses and half carcasses, frozen	0	12 692	180	180	2	0	0	1	1	0
'081330	Apples, dried	0	469	178	178	2	0	0	1	1	0
'240290	Cigars, cheroots, cigarillos and cigarettes, cntg tobacco substitutes	0	175	1 018	175	2	0	0	1	1	0
'090112	Coffee, not roasted, decaffeinated	0	9 913	171	171	2	0	0	1	1	0
'020629	Bovine edible offal, frozen nes	0	1 984	169	169	2	0	0	1	1	0
'071310	Peas dried, shelled, whether or not skinned or split	0	2 503	168	168	2	0	0	1	1	0
'350110	Casein	0	168	169	168	2	0	0	1	1	0
'110900	Wheat gluten, whether or not dried	0	2 346	164	164	2	0	0	1	1	0
'120930	Seeds, flower, for sowing	0	898	161	161	2	0	0	1	1	0
'070690	Salad beetroot,salsif,celeriac,radish&sim edibl roots,fresh/chilld nes	0	157	276	157	2	0	0	1	1	0
'120925	Seeds, rye grass, for sowing	0	154	234	154	2	0	0	1	1	0
'200551	Beans,shelld prepard/preservd,o/t by vinegar/acetic acid,not frozen	0	2 371	154	154	2	0	0	1	1	0
'290544	D-glucitol (sorbitol)	0	2 958	154	154	2	0	0	1	1	0
'080300	Bananas including plantains, fresh or dried	0	125 740	148	148	2	0	0	1	1	0
'152110	Vegetable waxes excludg triglycerides,whether or not refind or colourd	0	148	251	148	2	0	0	1	1	0
'010410	Sheep, live	0	435 413	146	146	2	0	0	1	1	0

'151610	Animal fats&oils&fract hydrogenatd,inter/re-esterifid,etc,ref'd/not	0	10 336	134	134	2	0	0	1	1	0
'020690	Sheep, goats, asses, mules or hinnies edible offal, frozen	0	10 583	129	129	2	0	0	1	1	0
'081010	Strawberries, fresh	0	5 190	128	128	2	0	0	1	1	0
'190510	Crispbread	0	128	369	128	2	0	0	1	1	0
'180400	Cocoa butter, fat and oil	0	4 389	127	127	2	0	0	1	1	0
'080132	Cashew nuts, without shell, fresh or dried	0	5 194	126	126	2	0	0	1	1	0
'110319	Cereal groats and meal nes	0	20 626	125	125	2	0	0	1	1	0
'020443	Sheep cuts, boneless, frozen	0	21 874	123	123	2	0	0	1	1	0
'040520	Dairy spreads	0	14 452	123	123	2	0	0	1	1	0
'240130	Tobacco refuse	0	123	123	123	2	0	0	1	1	0
'160415	Mackerel, prepared or preserved, whole or in pieces, but not minced	0	5 782	122	122	2	0	0	1	1	0
'330113	Essential oils of lemon	0	122	4 564	122	2	0	0	1	1	0
'080420	Figs, fresh or dried	0	948	120	120	2	0	0	1	1	0
'020423	Sheep cuts, boneless, fresh or chilled	0	377	116	116	2	0	0	1	1	0
'520299	Cotton waste, nes	0	1 026	114	114	2	0	0	1	1	0
'040620	Cheese, grated or powdered, of all kinds	0	5 932	113	113	2	0	0	1	1	0
'200570	Olives prepar'd o preserv'd,oth than by vinegar o acetic acid,not frozen	0	15 162	112	112	2	0	0	1	1	0
'151319	Coconut (copra) oil&its fractions refined but not chemically modified	0	1 584	111	111	2	0	0	1	1	0
'190532	Waffles and wafers	0	53 488	109	109	2	0	0	1	1	0
'410120	Whole raw hides and skins of bovine "incl. buffalo" or equine animals,	0	109	4 923	109	2	0	0	1	1	0
'110412	Oats, rolled or flaked grains	0	12 933	103	103	2	0	0	1	1	0
'070930	Aubergines(egg-plants), fresh or chilled	0	101	130	101	2	0	0	1	1	0
'081320	Prunes, dried	0	345	99	99	2	0	0	1	1	0
'150890	Ground-nut oil and its fractions refined but not chemically modified	0	97	303	97	2	0	0	1	1	0
'160520	Shrimps and prawns,prepared or preserved	0	6 267	94	94	2	0	0	1	1	0
'510219	Fine animal hair, neither carded nor combed (excl. wool and hair of Ka	0	91	3 892	91	2	0	0	1	1	0
'020726	Turkey, cuts & offal, fresh or chilled	0	678	90	90	2	0	0	1	1	0
'110720	Malt, roasted	0	88	1 566	88	2	0	0	1	1	0
'071339	Beans dried, shelled, whether or not skinned or split, nes	0	84	732	84	2	0	0	1	1	0
'080119	Coconuts, excluding dessicated	0	1 241	83	83	2	0	0	1	1	0

'080250	Pistachios, fresh or dried, whether or not shelled or peeled	0	9 551	83	83	2	0	0	1	1	0
'130220	Pectic substances, pectinates & pectates	0	4 119	82	82	2	0	0	1	1	0
'160210	Homogenized preparations of meat and meat offal	0	216	82	82	2	0	0	1	1	0
'190520	Gingerbread and the like	0	104	78	78	2	0	0	1	1	0
'040490	Products consisting of natural milk constituents sweetened or not nes	0	14 270	77	77	2	0	0	1	1	0
'140420	Cotton linters	0	567	77	77	2	0	0	1	1	0
'071021	Peas, frozen	0	5 501	76	76	2	0	0	1	1	0
'160411	Salmon prepared or preserved, whole or in pieces, but not minced	0	74	125	74	2	0	0	1	1	0
'330124	Essential oils of peppermint	0	81	73	73	2	0	0	1	1	0
'070959	Fresh or chilled edible mushrooms (excl. mushrooms of the genus "Agari	0	2 741	72	72	2	0	0	1	1	0
'520300	Cotton, carded or combed	0	538	69	69	2	0	0	1	1	0
'210130	Chicory&other coffee substitutes roasted&extracts,ess&conc thereof	0	68	991	68	2	0	0	1	1	0
'151550	Sesame oil&its fractions whether/not refind,but not chemically modifid	0	511	65	65	2	0	0	1	1	0
'070390	Leeks and other alliaceous vegetables, fresh or chilled	0	64	778	64	2	0	0	1	1	0
'120799	Oil seeds and oleaginous fruits, nes, whether or not broken	0	63	1 260	63	2	0	0	1	1	0
'350400	Peptones & derivs;protein substances and derivs, nes; hide powder	0	89	63	63	2	0	0	1	1	0
'240120	Tobacco, unmanufactured, partly or wholly stemmed or stripped	0	62	31 595	62	2	0	0	1	1	0
'410390	Raw hides and skins of animals, nes	0	62	13 918	62	2	0	0	1	1	0
'071022	Beans, frozen	0	2 395	61	61	2	0	0	1	1	0
'081040	Cranberries, bilberries and other fruits of the genus Vaccinium, fresh	0	61	1 188	61	2	0	0	1	1	0
'230210	Maize (corn) bran, sharps and other residues, pelleted or not	0	61	296	61	2	0	0	1	1	0
'200880	Strawberries nes,o/w prep/presvd,whether/not sugard,sweet/spiritd	0	1 042	59	59	2	0	0	1	1	0
'010511	Fowls, live domestic weighing not more than 185 g	0	4 869	58	58	2	0	0	1	1	0
'200791	Citrus fruit (marmalades,purée,etc) ckd prep wther/nt sugard/sweetend	0	58	1 884	58	2	0	0	1	1	0
'070490	Cabbages,kohlrabi,kale and sim edible brassicas	0	57	771	57	2	0	0	1	1	0

	nes,fresh or chilled										
'080212	Almonds,fresh or dried,shelled or peeled	0	6 633	57	57	2	0	0	1	1	0
'330112	Essential oils of orange	0	57	843	57	2	0	0	1	1	0
'060312	Fresh cut carnations and buds, of a kind suitable for bouquets or for	0	56	195	56	2	0	0	1	1	0
'100620	Rice, husked (brown)	0	6 270	56	56	2	0	0	1	1	0
'110813	Potato starch	0	1 965	55	55	2	0	0	1	1	0
'110311	Wheat groats and meal	0	20 312	54	54	2	0	0	1	1	0
'410229	Sheep or lamb skins, raw, o/t pickled, without wool on	0	54	901	54	2	0	0	1	1	0
'100190	Wheat nes and meslin	0	53	8 296	53	2	0	0	1	1	0
'110320	Pellets	0	53	1 004	53	2	0	0	1	1	0
'110422	Oats, hulled,pearled,sliced or kibbled	0	1 947	52	52	2	0	0	1	1	0
'151530	Castor oil&its fractions,whether/not refind,but not chemically modifid	0	491	52	52	2	0	0	1	1	0
'010594	Live fowls of the species Gallus domesticus, weighing > 185	0	5 897	51	51	2	0	0	1	1	0
'071159	Mushrooms and truffles, provisionally preserved, e.g., by sulphur diox	0	127	51	51	2	0	0	1	1	0
'200390	Mushrooms, prepared or preserved otherwise than by vinegar or acetic a	0	1 765	51	51	2	0	0	1	1	0
'200950	Tomato juice unfermented¬ spirited,whether or not sugared or sweet	0	498	50	50	2	0	0	1	1	0
'510121	Degreased shorn wool, not carded, combed or carbonised	0	45	2 364	45	2	0	0	1	1	0
'050690	Bones&horn-cores degelatinisd,unwk,defattd o simply prepr,powder&waste	0	44	1 248	44	2	0	0	1	1	0
'151329	Palm kernel/babassu oil their fract,refind but not chemically modifid	0	17 210	43	43	2	0	0	1	1	0
'190240	Couscous	0	265	42	42	2	0	0	1	1	0
'510111	Greasy shorn wool, not carded or combed	0	42	145 891	42	2	0	0	1	1	0
'070970	Spinach,N-Z spinach & orache spinach (garden spinach),fresh or chilled	0	41	42	41	2	0	0	1	1	0
'170250	Fructose, chemically pure	0	123	41	41	2	0	0	1	1	0
'152190	Beeswax,oth insect waxes&spermaceti whether or not refined or coloured	0	277	40	40	2	0	0	1	1	0
'190300	Tapioca subst prep from starch in flake,grain,pearl,siftg or sim forms	0	596	39	39	2	0	0	1	1	0
'091030	Turmeric (curcuma)	0	1 481	38	38	2	0	0	1	1	0
'071340	Lentils dried, shelled, whether or not skinned or	0	16 221	37	37	2	0	0	1	1	0

	split										
'090920	Coriander seeds	0	2 673	37	37	2	0	0	1	1	0
'151000	Oils&thr fract nes obt from olives,ref'd/not,not chem mod,incl blends	0	50	34	34	2	0	0	1	1	0
'040310	Yogurt concentratd o not,sweetend o not,flavourd o contg fruit o cocoa	0	33	5 115	33	2	0	0	1	1	0
'051191	Fish,shellfish&aqua invert prod nes&dead anim of Ch 3 nt for hum cons	0	33	1 281	33	2	0	0	1	1	0
'040640	Cheese, blue-veined	0	169	32	32	2	0	0	1	1	0
'051199	Animal prods nes&dead animals of Chapter I unfit for human consumption	0	32	1 419	32	2	0	0	1	1	0
'080131	Cashew nuts, in shell, fresh or dried	0	738	31	31	2	0	0	1	1	0
'120921	Seeds, lucerne (alfalfa), for sowing	0	46 168	31	31	2	0	0	1	1	0
'151229	Cotton-seed and its fractions refined but not chemically modified	0	30	479	30	2	0	0	1	1	0
'021091	Meat and edible offal, salted, in brine, dried or smoked, and edible f	0	284	29	29	2	0	0	1	1	0
'010631	Live birds of prey	0	28	52	28	2	0	0	1	1	0
'090620	Cinnamon and cinnamon-tree flowers crushed or ground	0	311	28	28	2	0	0	1	1	0
'160540	Crustaceans nes, prepared or preserved	0	28	922	28	2	0	0	1	1	0
'180310	Cocoa paste not defatted	0	3 668	28	28	2	0	0	1	1	0
'020421	Sheep carcasses and half carcasses, fresh or chilled	0	17 925	27	27	2	0	0	1	1	0
'020622	Bovine livers, edible offal, frozen	0	809	26	26	2	0	0	1	1	0
'020734	Ducks/geese/guinea fowl, fatty livers, fresh/chilled	0	50	25	25	2	0	0	1	1	0
'120720	Cotton seeds, whether or not broken	0	14 322	25	25	2	0	0	1	1	0
'091020	Saffron	0	2 094	24	24	2	0	0	1	1	0
'071029	Leguminous vegetables frozen nes	0	1 605	23	23	2	0	0	1	1	0
'110430	Germ of cereals, whole, rolled, flaked or ground	0	43	23	23	2	0	0	1	1	0
'090930	Cumin seeds	0	4 922	22	22	2	0	0	1	1	0
'330130	Resinoids	0	1 581	22	22	2	0	0	1	1	0
'520210	Cotton yarn waste (including thread waste)	0	22	143	22	2	0	0	1	1	0
'080260	Macadamia nuts, fresh or dried, whether or not shelled or peeled	0	21	14 964	21	2	0	0	1	1	0
'160416	Anchovies, prepared or preserved, whole or in pieces, but not minced	0	421	20	20	2	0	0	1	1	0
'071332	Beans,small red (Adzuki) dried,shelled,whether or not skinned or split	0	142	19	19	2	0	0	1	1	0

'090700	Cloves (whole fruit, cloves and stems)	0	2 023	19	19	2	0	0	1	1	0
'090830	Cardamoms	0	52 349	19	19	2	0	0	1	1	0
'330125	Essential oils of other mints	0	86	19	19	2	0	0	1	1	0
'130212	Liquorice extract	0	306	18	18	2	0	0	1	1	0
'170310	Cane molasses	0	2 766	17	17	2	0	0	1	1	0
'230110	Flours,meals&pellets of meat o meat offal unfit for human cons;greaves	0	17	834	17	2	0	0	1	1	0
'200860	Cherries nes,o/w prep o presvd whether o not sugard,sweetend o spiritd	0	723	16	16	2	0	0	1	1	0
'071239	Dried mushrooms and truffles, whole, cut, sliced, broken or in powder,	0	860	15	15	2	0	0	1	1	0
'080222	Hazelnuts or filberts, fresh or dried, shelled or peeled	0	988	15	15	2	0	0	1	1	0
'110610	Flour and meal of the dried leguminous vegetables of heading No 07.13	0	8 864	15	15	2	0	0	1	1	0
'130120	Gum arabic	0	308	15	15	2	0	0	1	1	0
'010611	Live primates	0	14	23	14	2	0	0	1	1	0
'120750	Mustard seeds, whether or not broken	0	114	14	14	2	0	0	1	1	0
'020441	Sheep carcasses and half carcasses, frozen	0	12 924	13	13	2	0	0	1	1	0
'230250	Bran, sharps and other residues of leguminous plants, pelleted or not	0	13	21	13	2	0	0	1	1	0
'110814	Manioc (cassava) starch	0	12	109	12	2	0	0	1	1	0
'020732	Ducks/geese/guinea fowl, whole, fresh or chilled	0	109	11	11	2	0	0	1	1	0
'020810	Rabbit or hare meat and edible meat offal, fresh, chilled or frozen	0	51	11	11	2	0	0	1	1	0
'060240	Roses, grafted or not	0	11	1 206	11	2	0	0	1	1	0
'071030	Spinach, N-Z spinach and orache spinach (garden spinach), frozen	0	868	11	11	2	0	0	1	1	0
'080211	Almonds in shell fresh or dried	0	3 236	11	11	2	0	0	1	1	0
'200891	Palm hearts nes,o/w prep o presvd,whether o not sugard,sweet o spiritd	0	232	11	11	2	0	0	1	1	0
'020450	Goat meat, fresh, chilled or frozen	0	8 514	10	10	2	0	0	1	1	0
'080232	Walnuts, fresh or dried, shelled or peeled	0	648	10	10	2	0	0	1	1	0
'090950	Fennel or juniper seeds	0	724	10	10	2	0	0	1	1	0
'130231	Agar-agar	0	133	9	9	2	0	0	1	1	0
'290543	Mannitol	0	248	9	9	2	0	0	1	1	0
'071350	Broad beans&horse beans dried,shelled,whether or not skinned or split	0	3 862	8	8	2	0	0	1	1	0
'071490	Arrowroot,salep etc fr o drid whether o not slicd o pelletd&sago pith	0	2 734	8	8	2	0	0	1	1	0

'090910	Anise or badian seeds	0	399	8	8	2	0	0	1	1	0
'071151	Mushrooms of the genus "Agaricus", provisionally preserved, e.g., by s	0	194	7	7	2	0	0	1	1	0
'071410	Manioc (cassava), fresh or dried, whether or not sliced or pelleted	0	7	6	6	2	0	0	1	1	0
'170260	Fructose&fructose syrup nes,cntg in dry state >50% by wght of fructose	0	186	6	6	2	0	0	1	1	0
'040811	Egg yolks dried	0	992	5	5	2	0	0	1	1	0
'080231	Walnuts in shell, fresh or dried	0	845	5	5	2	0	0	1	1	0
'120400	Linseed, whether or not broken	0	84	5	5	2	0	0	1	1	0
'152200	Degras & residues from fatty substances or animal or vegetable waxes	0	19	5	5	2	0	0	1	1	0
'090619	Cinnamon and cinnamon-tree flowers (excl. cinnamon Cinnamomum eylanicu	0	718	4	4	2	0	0	1	1	0
'151499	High erucic acid rape or colza oil "fixed oil which has an erucic acid	0	902	4	4	2	0	0	1	1	0
'350219	Egg albumin, other than dried	0	565	4	4	2	0	0	1	1	0
'020735	Ducks/geese/guinea fowl, cuts/offal nes, fresh/chilled	0	3	25	3	2	0	0	1	1	0
'060313	Fresh cut orchids and buds, of a kind suitable for bouquets or for orn	0	3	3	3	2	0	0	1	1	0
'080122	Brazil nuts, without shell, fresh or dried	0	204	3	3	2	0	0	1	1	0
'090611	Cinnamon Cinnamomum eylanicum Blume (excl. crushed and ground)	0	1 506	3	3	2	0	0	1	1	0
'160412	Herrings, prepared or preserved, whole or in pieces but not minced	0	106	3	3	2	0	0	1	1	0
'160430	Caviar and caviar substitutes prepared from fish eggs	0	623	3	3	2	0	0	1	1	0
'160510	Crab, prepared or preserved	0	45	3	3	2	0	0	1	1	0
'200591	Bamboo shoots, prepared or preserved otherwise than by vinegar or acet	0	3	104	3	2	0	0	1	1	0
'071140	Cucumbers&gherkins provisionally presvd,but nt f immediate consumption	0	31	2	2	2	0	0	1	1	0
'120922	Seeds, clover, for sowing	0	450	2	2	2	0	0	1	1	0
'100300	Barley	0	2142 352	1	1	2	0	0	1	1	0
'100830	Canary seed	0	227	1	1	2	0	0	1	1	0
'120910	Sugar beet seed, for sowing	0	7	1	1	2	0	0	1	1	0
'121020	Hop cones, ground, powdered or pelleted and lupulin	0	1	1 283	1	2	0	0	1	1	0
'150100	Lard;pig fat nes&poultry fat,renderd,whether/not	0	492	1	1	2	0	0	1	1	0

	pressd/solv-extractd										
'150810	Ground-nut oil, crude	0	1	221	1	2	0	0	1	1	0
'160530	Lobster, prepared or preserved	0	1	596	1	2	0	0	1	1	0
'230500	Ground-nut oil-cake&oth solid residues,whether or not ground or pellet	0	301	1	1	2	0	0	1	1	0
'230700	Wine lees and argol	0	1	59	1	2	0	0	1	1	0
'410150	Whole raw hides and skins of bovine "incl. buffalo" or equine animals,	0	1	12 482	1	2	0	0	1	1	0
'430180	Raw furskins nes, whole	0	1	42	1	2	0	0	1	1	0
'010639	Live birds (excl. birds of prey and psittaciformes "incl. parrots, par	0	0	508	0	2	0	0	1	1	0
'050510	Feathers used for stuffg&down cleaned,disinfected or treated for presv	0	0	249	0	2	0	0	1	1	0
'090810	Nutmeg	0	0	31	0	2	0	0	1	1	0
'120760	Safflower seeds, whether or not broken	0	0	0	0	2	0	0	1	1	0
'120926	Seeds, Timothy grass, for sowing	0	0	0	0	2	0	0	1	1	0
'130110	Lac	0	0	0	0	2	0	0	1	1	0
'150410	Fish-liver oils&their fractions,refined or not,but not chemically mod	0	0	11	0	2	0	0	1	1	0
'330121	Essential oils of geranium	0	0	0	0	2	0	0	1	1	0
'410190	Butts, bends, bellies and split raw hides and skins of bovine "incl. b	0	0	2 034	0	2	0	0	1	1	0
'500390	Silk waste, nes	0	0	0	0	2	0	0	1	1	0
'510220	Coarse animal hair, not carded or combed	0	0	7	0	2	0	0	1	1	0
'510320	Waste (other than noils) of wool/of fine animal hair,ex garnettd stock	0	0	1 623	0	2	0	0	1	1	0
'520291	Garnetted stock of cotton	0	14	0	0	2	0	0	1	1	0
'050610	Ossein & bones treated with acid,unworked,defatted or simply prepared	1	0	812		2	1	0	0	1	0
'220210	Waters incl mineral&aeratd,containg sugar o sweeteng matter o flavourd	0	3 016	48 877	3 016	1	0	0	0	0	1
'080590	Citrus fruits, fresh or dried, nes	0	2 045	1 598	1 598	1	0	0	0	0	1
'210230	Baking powders, prepared	0	8 980	1 527	1 527	1	0	0	0	0	1
'040700	Eggs, bird, in shell, fresh, preserved or cooked	0	14 522	1 491	1 491	1	0	0	0	0	1
'170230	Glucose&glucose syrup nt cntg fruct/cntg in dry state <20% by wt fruct	0	979	2 340	979	1	0	0	0	0	1
'040120	Milk not concentrated & unsweetened exceeding 1% not exceeding 6% fat	0	632	2 227	632	1	0	0	0	0	1
'200540	Peas prepar d o preservd,oth than by vinegar o acetic acid,not frozen	0	781	199	199	1	0	0	1	0	0

'070951	Mushrooms, fresh or chilled	0	193	2 853	193	1	0	0	1	0	0
'020736	Ducks/geese/guinea fowl, cuts/offal, frozen	0	1 373	192	192	1	0	0	1	0	0
'120100	Soya beans	0	12 769	183	183	1	0	0	1	0	0
'090500	Vanilla beans	0	181	277	181	1	0	0	0	1	0
'070810	Peas, shelled or unshelled, fresh or chilled	0	231	172	172	1	0	0	0	1	0
'040900	Honey, natural	0	27 127	157	157	1	0	0	0	1	0
'051000	Ambergris,castoreum,etc,bile drid/not&animal gland&prod for pharm prep	0	154	238	154	1	0	0	0	1	0
'200510	Homogenizd vegetables prep/presvd,o/t by vinegar/acetic acid,not frozn	0	6 330	144	144	1	0	0	1	0	0
'021020	Bovine meat cured	0	726	141	141	1	0	0	0	1	0
'071220	Onions dried but not further prepared	0	573	140	140	1	0	0	1	0	0
'020725	Turkey, whole, frozen	0	698	126	126	1	0	0	0	1	0
'121410	Lucerne (alfalfa) meal and pellets	0	1 426	126	126	1	0	0	0	1	0
'071390	Leguminous vegetables dried,shelled,whether or not skinnd or split,nes	0	3 365	120	120	1	0	0	1	0	0
'151211	Sunflower-seed or safflower oil, crude	0	29 916	116	116	1	0	0	1	0	0
'070940	Celery, other than celeriac, fresh or chilled	0	114	152	114	1	0	0	0	1	0
'100890	Cereals unmilled nes	0	112	735	112	1	0	0	0	1	0
'070519	Lettuce, fresh or chilled nes	0	106	145	106	1	0	0	0	1	0
'040291	Milk and cream unsweetened, nes	0	72 010	99	99	1	0	0	1	0	0
'110520	Potato flakes	0	926	99	99	1	0	0	1	0	0
'220890	Undenatrd ethyl alc <80% alc cont by vol&spirit,liqueur&spirit bev nes	0	89	1 342	89	1	0	0	1	0	0
'081290	Fruits&nuts provis preservd but unfit f immediate consumption nes	0	748	82	82	1	0	0	1	0	0
'230610	Cotton sed oil-cake&oth solid residues,whether or not ground or pellet	0	312	69	69	1	0	0	0	1	0
'170211	Lactose and lactose syrup, >99% lactose on dry matter	0	1 554	66	66	1	0	0	1	0	0
'230800	Acorns, horse-chestnuts, marc and other vegetable materials and vegeta	0	64	347	64	1	0	0	1	0	0
'020724	Turkey, whole. fresh or chilled	0	153	61	61	1	0	0	0	1	0
'060410	Mosses and lichens suitable for bouquets or for ornamental purposes	0	55	651	55	1	0	0	0	1	0
'170220	Maple sugar and maple syrup	0	134	53	53	1	0	0	0	1	0
'020733	Ducks/geese/guinea fowl, whole, frozen	0	177	49	49	1	0	0	0	1	0
'071331	Urd,mung,black/green gram beans drid shelld,whether/not skinnd/split	0	3 351	49	49	1	0	0	1	0	0

'110429	Cereals, hulled, pearled, sliced or kibbled nes	0	4 520	48	48	1	0	0	0	1	0
'071120	Olives, provisionally preservd but nt suitable f immediate consumption	0	3 605	46	46	1	0	0	1	0	0
'160231	Turkey meat and meat offal prepared or preserved, excluding livers	0	3 004	42	42	1	0	0	1	0	0
'050400	Guts, bladders and stomachs of animals except fish whole or in pieces	0	41	1 327	41	1	0	0	0	1	0
'150710	Soya-bean oil crude, whether or not degummed	0	1 377	41	41	1	0	0	0	1	0
'020210	Bovine carcasses and half carcasses, frozen	0	5 046	38	38	1	0	0	1	0	0
'151110	Palm oil, crude	0	116 148	38	38	1	0	0	1	0	0
'110819	Starches nes	0	4 025	35	35	1	0	0	1	0	0
'230240	Cereal bran, sharps and other residues nes, pelleted or not	0	51	35	35	1	0	0	0	1	0
'010620	Live reptiles "e.g. snakes, turtles, alligators, caymans, iguanas, gav	0	34	62	34	1	0	0	0	1	0
'020610	Bovine edible offal, fresh or chilled	0	32	152	32	1	0	0	1	0	0
'510129	Degreased wool (other than shorn wool), not carded, combed or carbonised	0	32	1 774	32	1	0	0	1	0	0
'080920	Cherries, fresh	0	2 278	31	31	1	0	1	0	0	0
'081400	Peel of citrus fruit/melons (watermelons) fresh, frz, drid/prov preservd	0	27	63	27	1	0	0	0	1	0
'081110	Strawberries, uncookd o steamd o boild in water, sweetend o not, frozen	0	8 432	26	26	1	0	0	1	0	0
'230690	Veg oil-cake&oth solid residues nes, whether or not ground or pelleted	0	26	116	26	1	0	0	0	1	0
'410221	Sheep or lamb skins, pickled, without wool on	0	21	36 360	21	1	0	0	1	0	0
'050790	Whalebone, horns, etc unworkd or simply preparad, unshapd, and powder&waste	0	17	252	17	1	0	0	0	1	0
'120740	Sesamum seeds, whether or not broken	0	26 599	16	16	1	0	0	1	0	0
'040899	Eggs, bird, not in shell nes	0	1 114	12	12	1	0	0	1	0	0
'081120	Raspberries, mulberries, etc uncook, steam/boil in water sweetend/nt, froz	0	177	11	11	1	0	0	1	0	0
'140120	Rattans used primarily for plaiting	0	53	11	11	1	0	0	1	0	0
'041000	Edible products of animal origin nes	0	111	10	10	1	0	0	1	0	0
'150420	Fish fats&oils&their fractions exc liver, refind/not, not chemically mod	0	10	1 800	10	1	0	0	0	1	0
'230630	Sunflower sed oil-cake&oth solid residues, whether/not ground/pellet	0	10	222	10	1	0	0	1	0	0
'510119	Greasy wool (other than shorn wool) not carded or combed	0	104	10	10	1	0	0	1	0	0

'151511	Linseed oil, crude	0	961	9	9	1	0	0	1	0	0
'090300	Maté	0	62	8	8	1	0	0	0	1	0
'100810	Buckwheat	0	15	8	8	1	0	0	0	1	0
'110630	Flour,meal&powder of edible fruits&nuts&peel of citrus fruit or melons	0	1 907	8	8	1	0	0	1	0	0
'151529	Maize (corn) oil and its fractions,refined but not chemically modified	0	39 656	8	8	1	0	0	1	0	0
'081210	Cherries provisionally preservd but unsuitable f immediate consumption	0	6	31	6	1	0	0	0	1	0
'040819	Egg yolks nes	0	693	5	5	1	0	0	1	0	0
'110820	Inulin	0	177	5	5	1	0	0	0	1	0
'120300	Copra	0	5	18	5	1	0	0	0	1	0
'150300	Lard stearin&oil,oleostearin&oil&tallow oil,not emulsifd,mxd/o/w prepr	0	5	1 063	5	1	0	0	0	1	0
'090940	Caraway seeds	0	138	4	4	1	0	0	1	0	0
'200320	Truffles prepared or preserved other than by vinegar or acetic acid	0	273	4	4	1	0	0	1	0	0
'350290	Albumins nes; albuminates and other albumin derivatives	0	168	4	4	1	0	0	1	0	0
'070529	Chicory, fresh or chilled, nes	0	30	3	3	1	0	0	0	1	0
'050100	Hair, human, unworked washed or scoured or not and waste	0	2	2	2	1	0	0	0	1	0
'110710	Malt, not roasted	0	2	655	2	1	0	0	0	1	0
'121300	Cereal straw&husks,unprepd,whether or not choppd,ground,pressd,pelletd	0	48	2	2	1	0	0	0	1	0
'430110	Raw mink furskins, whole	0	6	2	2	1	0	0	1	0	0
'050290	Hair and waste of badger and of other brushmaking hair	0	1	14	1	1	0	0	0	1	0
'060230	Rhododendrons and azaleas,grafted or not	0	229	1	1	1	0	0	1	0	0
'070521	Witloof chicory, fresh or chilled	0	44	1	1	1	0	0	1	0	0
'080221	Hazelnuts or filberts in shell fresh or dried	0	338	1	1	1	0	0	1	0	0
'180100	Cocoa beans, whole or broken, raw or roasted	0	46	1	1	1	0	0	1	0	0
'230330	Brewing or distilling dregs and waste	0	1	6	1	1	0	0	1	0	0
'230649	Oil-cake and other solid residues, whether or not ground or in the for	0	1	3	1	1	0	0	0	1	0
'530290	True hemp fibre otherwise processd but not spun,tow&waste of true hemp	0	1	1	1	1	0	0	0	1	0
'010512	Live turkey chicks <=0.185kg	0	0	4	0	1	0	0	0	1	0
'010592	Live fowl (gallus domesticus) weighing 0.185-2kg	0	0	0	0	1	0	0	0	1	0
'010593	Live fowl (gallus domesticus) >2kg	0	0	0	0	1	0	0	1	0	0

'010599	Poultry, live except domestic fowls, weighing more than 185 g	0	0	25	0	1	0	0	0	1	0
'010632	Live psittaciformes "incl. parrots, parakeets, macaws and cockatoos"	0	0	1 011	0	1	0	0	0	1	0
'020621	Bovine tongues, edible offal, frozen	0	0	31	0	1	0	0	0	1	0
'040891	Eggs, bird, not in shell, dried	0	2 032	0	0	1	0	0	1	0	0
'050900	Sponges, natural of animal origin	0	0	0	0	1	0	0	1	0	0
'070952	Truffles, fresh or chilled	0	0	0	0	1	0	0	1	0	0
'071130	Capers, provisionally preservd but nt suitable f immediate consumption	0	0	0	0	1	0	0	0	1	0
'071232	Dried wood ears "Auricularia spp.", whole, cut, sliced, broken or in p	0	0	1	0	1	0	0	0	1	0
'080121	Brazil nuts, in shell, fresh or dried	0	80	0	0	1	0	0	1	0	0
'080240	Chestnuts, fresh or dried, whether or not shelled or peeled	0	1 288	0	0	1	0	0	1	0	0
'081030	Black, white or red currants and gooseberries, fresh	0	0	0	0	1	0	0	1	0	0
'110230	Rice flour	0	0	0	0	1	0	0	0	1	0
'110620	Flour&meal of sago&of roots or tubers with hi starch or inulin content	0	1 347	0	0	1	0	0	1	0	0
'120590	High erucic rape or colza seeds "yielding a fixed oil which has an eru	0	35	0	0	1	0	0	1	0	0
'120710	Palm nuts and kernels, whether or not broken	0	0	0	0	1	0	0	0	1	0
'121010	Hop cones, not ground, powdered or pelleted	0	0	281	0	1	0	0	0	1	0
'121110	Liquorice roots usd primly in pharm,perf,insecticide,fungicid/sim purp	0	0	0	0	1	0	0	1	0	0
'121120	Ginseng roots usd primly in pharm,perf,insecticide,fungicide/sim purp	0	233	0	0	1	0	0	1	0	0
'121210	Locust beans, including seeds, fresh or dried, whether or not ground	0	0	0	0	1	0	0	0	1	0
'140200	Vegetable materials of a kind used primarily as stuffing or as padding	0	0	0	0	1	0	0	1	0	0
'140410	Raw vegetable materials used primarily in dyeing or tanning	0	0	0	0	1	0	0	0	1	0
'151321	Palm kernel or babassu oil, crude	0	1 743	0	0	1	0	0	1	0	0
'151411	Low erucic acid rape or colza oil "fixed oil which has an erucic acid	0	569	0	0	1	0	0	1	0	0
'151419	Low erucic acid rape or colza oil "fixed oil which has an erucic acid	0	651	0	0	1	0	0	1	0	0
'151491	High erucic acid rape or colza oil "fixed oil which has an erucic acid	0	53	0	0	1	0	0	1	0	0

'151521	Maize (corn) oil crude	0	83 392	0	0	1	0	0	1	0	0
'180320	Cocoa paste wholly or partly defatted	0	298	0	0	1	0	0	1	0	0
'200590	Veg nes&mix of veg prep/presvd o/t by vinegar/acetic acid,not frozen	0	0	0	0	1	0	0	0	1	0
'230310	Residues of starch manufacture and similar residues	0	0	11	0	1	0	0	0	1	0
'230320	Beet-pulp, bagasse and other waste of sugar manufacture	0	13 467	0	0	1	0	0	1	0	0
'230620	Linseed oil-cake&other solid residues,whether or not ground or pellet	0	0	0	0	1	0	0	1	0	0
'230641	Oil-cake and other solid residues, whether or not ground or in the for	0	0	0	0	1	0	0	1	0	0
'230660	Palm nut/kernel oil-cake&oth solid residues,whether/not ground/pellet	0	925	0	0	1	0	0	1	0	0
'330111	Essential oils of bergamot	0	0	0	0	1	0	0	1	0	0
'330122	Essential oils of jasmin	0	0	0	0	1	0	0	1	0	0
'330123	Essential oils of lavender or of lavandin	0	0	0	0	1	0	0	1	0	0
'330126	Essential oils of vetiver	0	0	0	0	1	0	0	0	1	0
'350211	Egg albumin, dried	0	673	0	0	1	0	0	1	0	0
'350220	Milk albumin, incl concentrates of several proteins	0	141	0	0	1	0	0	1	0	0
'410310	Goat or kid hides and skins, raw, nes	0	0	0	0	1	0	0	1	0	0
'410320	Reptile skins, raw	0	0	3 542	0	1	0	0	0	1	0
'430170	Raw seal furskins, whole	0	0	0	0	1	0	0	0	1	0
'430190	Raw furskin pieces (e.g. heads,tails,paws),suitable for furrier's use	0	0	1	0	1	0	0	0	1	0
'500100	Silk-worm cocoons suitable for reeling	0	0	5	0	1	0	0	0	1	0
'500200	Raw silk (not thrown)	0	4	0	0	1	0	0	1	0	0
'510310	Noils of wool or of fine animal hair	0	0	1 149	0	1	0	0	1	0	0
'510330	Waste of coarse animal hair, excluding garnetted stock	0	6	0	0	1	0	0	0	1	0
'530110	Flax fibre, raw or retted	0	27	0	0	1	0	0	1	0	0
'020711	Fowls (gallus domesticus), whole, fresh or chilled	0	645	131	131	0	0	0	0	0	0
'200560	Asparagus preparad or preservd,o/t by vinegar or acetic acid,not frozen	0	93	502	93	0	0	0	0	0	0
'200110	Cucumbers and gherkins,prepared or preserved by vinegar or acetic acid	0	1 152	69	69	0	0	0	0	0	0
'160239	Dom fowl,duck,goose&guinea fowl meat&meat offal prep/presvd exc livers	0	4 926	41	41	0	0	0	0	0	0
'071231	Dried mushrooms of the genus "Agaricus", whole,	0	35	118	35	0	0	0	0	0	0

	cut, sliced, broken or										
'020680	Sheep, goats, asses, mules or hinnies edible offal, fresh or chilled	0	644	19	19	0	0	0	0	0	0
'010519	Poultry, live except domestic fowls, weighing not more than 185 g	0	190	16	16	0	0	0	0	0	0
'121291	Sugar beet, fresh or dried, whether or not ground	0	9	9	9	0	0	0	0	0	0
'050590	Feathers&down nes clnd,disinfectd presvd,featherd pts&skins pdr&waste	0	1	3 535	1	0	0	0	0	0	0
'240391	Homogenized or reconstituted tobacco	0	49	1	1	0	0	0	0	0	0
'510211	Hair of Kashmir "cashmere" goats, neither carded nor combed	0	1	2 050	1	0	0	0	0	0	0
'010612	Live whales, dolphins and purpoises "mammals of the order Cetacea" and	0	0	240	0	0	0	0	0	0	0
'020900	Pig fat lean meat free&poultry fat unrenderd,frsh,childd,frozn or curd	0	0	29	0	0	0	0	0	0	0
'050300	Horsehair&waste put up or not as a layer with or without supg material	0	0	0	0	0	0	0	0	0	0
'060310	Cut flowers & flower buds for bouquets or ornamental purposes, fresh	0	0	0	0	0	0	0	0	0	0
'070910	Globe artichokes, fresh or chilled	0	0	0	0	0	0	0	0	0	0
'071233	Dried jelly fungi "Tremella spp.", whole, cut, sliced, broken or in po	0	0	1	0	0	0	0	0	0	0
'090610	Cinnamon and cinnamon-tree flowers neither crushed nor ground	0	0	0	0	0	0	0	0	0	0
'091040	Thyme and bay leaves	0	0	0	0	0	0	0	0	0	0
'091050	Curry	0	0	0	0	0	0	0	0	0	0
'110210	Rye flour	0	0	28	0	0	0	0	0	0	0
'120510	Low erucic acid rape or colza seeds "yielding a fixed oil which has an	0	0	0	0	0	0	0	0	0	0
'120730	Castor oil seeds, whether or not broken	0	0	0	0	0	0	0	0	0	0
'121230	Apricot,peach/plum stones&kernels nes,usd primly f human consumption	0	0	0	0	0	0	0	0	0	0
'130214	Pyrethrum or roots of plants containing rotenone, extracts	0	0	0	0	0	0	0	0	0	0
'150430	Marine mammal fats&oils&their fract,refind/not,but not chemically mod	0	0	31	0	0	0	0	0	0	0
'151221	Cotton-seed oil crude, whether or not gossypol has been removed	0	17	0	0	0	0	0	0	0	0
'180200	Cocoa shells, husks, skins and other cocoa waste	0	211	0	0	0	0	0	0	0	0
'230220	Rice bran, sharps and other residues, pelleted or	0	0	0	0	0	0	0	0	0	0

	not										
'230650	Coconut/copra oil-cake&oth solid residues,whether/not ground/pellet	0	0	3	0	0	0	0	0	0	0
'230670	Maize/corn germ oil-cake and solid residues	0	0	0	0	0	0	0	0	0	0
'330114	Essential oils of lime	0	0	0	0	0	0	0	0	0	0
'430130	Raw Persian and similar lamb furskins, whole	0	0	0	0	0	0	0	0	0	0
'500310	Silk waste, not carded or combed	0	0	0	0	0	0	0	0	0	0
'530121	Flax fibre, broken or scutched	0	0	0	0	0	0	0	0	0	0
'530129	Flax fibre, otherwise processed but not spun	0	8	0	0	0	0	0	0	0	0
'530130	Flax tow and waste (including yarn waste and garnetted stock)	0	0	0	0	0	0	0	0	0	0
'530210	True hemp fibre (Cannabis sativa L), raw or retted	0	0	0	0	0	0	0	0	0	0

* Where there were no exports in a year, but there were exports in later years, the years of no exports were ignored.

Annex 4: The 'trade chilling' concept⁸⁴ Contributed by: Bonani Nyhodo, Senior Economist - Supply Chain/Trade. National Agricultural Marketing Council - Republic of South Africa

Countries negotiate trade agreements with two anticipated benefits namely trade deepening and trade widening. Trade deepening is a situation whereby trade in the same products that are already traded is expanded. A situation whereby trade agreements result in new products being traded is known as trade widening. The two are mostly likely the two benefits of an FTA. **The Trade Chilling concept** has the ability to show which product lines will be of benefit, trade widening, to a country envisaging signing an FTA. This comes from the fact that there problem with trade widening is that it is difficult to foresee where these opportunities may lie.

Both quantitative and qualitative analyses and projections of the welfare effects of tariff liberalization, as one of the desired outcomes on an FTA, traditionally focus on current flows of trade. Such approaches are unable to estimate where new opportunities might lie. In particular, it is not possible to derive from the standard quantitative models or qualitative analyses a sense of where new areas of trade might be opened up as a consequence of tariff liberalisation in markets. It is quite possible, for instance, for South Africa to have relatively concentrated flows of trade in specific product categories, with one reason for this level of concentration being that the tariff structure outside those specific product lines is relatively high.

In short, as a consequence of these tariffs, trade may have been 'chilled', and it is this area of enquiry that should be of interest to trade policy makers. The issue is whether South Africa is fully exploiting potential trade (export) opportunities to Saudi Arabia or whether there is some trade chilling where the Saudi Arabia imports a product in large values/quantities and South Africa globally exports the same product in large values/quantities (but not to Saudi Arabia).

The two partners are trading in this product but not with each other. One way to determine whether this is the case or not, is to conduct a trade-chilling analysis. The methodology has the following points to take note of:

- Market opportunity (**importer**) is viewed through the value (high) of imports
- Supply potential (**exporter**) is viewed through the value (high) of exports
- The **importer** imports from other exporters but not the exporter (bullet 2)
- The exporter (bullet number 2) exports to other importers but not the importer (bullet number 1).

It is important to caution that this analysis while perhaps providing some useful pointers **does have limitations**. These limitations include that possible non-tariff barriers, tastes and preferences and trade classifications in a certain product that may not be strictly comparable at a detailed level.

Zooming the field down to agricultural and fisheries products this section looked at HS 6 lines where

- Saudi Arabian imports from the world to the value more than \$3 million in 2007 denotes the demand side potential from Saudi Arabia
- South African exports to the world of the value more than \$3 million in 2007 denote the supply side potential from South Africa.
- Imports into Saudi Arabia from South Africa to the value less than US\$ 15 000 to denote no trade

- Exports from South Africa to Saudi Arabia to the value less than \$15 000 in 2007 to denote 'no trade'.

After doing the chilling exercises where (i) global exports from South Africa in 2007 at least \$3 million and (ii) global imports into Saudi Arabia in 2007 were also at least \$3 million to give us lines where the trade opportunities are significant. This also capture the instances of products trade between these countries to the value less than US\$15 000 in 2007.

This left this section with 43HS 6 product lines in agricultural and fisheries products. Below in the table is a summary of products in which the two countries are not currently trading but which have the potential for trade. It is interesting to note that Saudi Arabia's applied tariffs to South African product are relatively low (moderate at around 5 %) except for tobacco products, where tariff range between 152% and 851%. Of the products that attract a higher tariff there is non that is shown to be part of the list in the table. It is there crucial to note that the reason for the non trade between South Africa and Saudi Arabia on these products is not based on tariffs. The implication is that further investigation is needed to figure out what stops trade in these products.

Summary of products in which Saudi Arabia and South Africa are trading with the rest of world but not with each other (US\$ '000)

Product code	Product label	Saudi Arabia's imports from world	South Africa's exports to world	Saudi Arabia's imports from SA	South Africa's exports to Saudi Arabia
		Value in 2007	Value in 2007	Value in 2007	Value in 2007
'200919	Orange juice	17165.00	8049.00	0.00	10.00
'091099	Spices nes	21231.00	5880.00	0.00	10.00
'200949	Pineapple juice	5060.00	12527.00	0.00	9.00
'080620	Grapes, dried	7803.00	55792.00	1.00	0.00
'070990	Vegetables, fresh or chilled nes	3131.00	4520.00	1.00	0.00
'170199	Refined sugar, in solid form, nes	113654.00	74549.00	0.00	0.00
'020890	Meat and edible meat offal,	3874.00	55086.00	0.00	0.00
'220210	Waters	3016.00	48877.00	0.00	0.00
'080290	Nuts edible	5034.00	26360.00	0.00	0.00
'230120	Flour,meal&pellet of fish,	14579.00	25774.00	0.00	0.00
'121299	Vegetable products	4468.00	25143.00	0.00	0.00
'100510	Maize (corn) seed	4759.00	16676.00	0.00	0.00
'210410	Soups and broths and preparations thereof	11565.00	16373.00	0.00	0.00
'100590	Maize (corn) nes	461410.00	15808.00	0.00	0.00
'210500	Ice cream and other edible ice, whether or not containing cocoa	36229.00	11889.00	0.00	0.00
'070190	Potatoes, fresh or chilled nes	6323.00	9793.00	0.00	0.00
'160420	Fish prepared or preserved, except whole or in pieces	6742.00	9492.00	0.00	0.00
'210210	Yeasts, active	8939.00	9383.00	0.00	0.00
'190110	Prep of cereals,flour,starch/milk f infant use,put up f retail sale	231953.00	8893.00	0.00	0.00
'151219	Sunflower-sed/safflower oil&their fractions refind but nt chem modifid	36844.00	8707.00	0.00	0.00
'010290	Bovine, live except pure-bred breeding	26097.00	8594.00	0.00	0.00
'200911	Orange juice,unfermentd¬ spiritd,whether not sugard sweet,frozen	37933.00	7909.00	0.00	0.00
'081190	Fruits&edible nuts uncook,steam/boil (water) sweetend/not,frozen,nes	5821.00	7544.00	0.00	0.00
'151710	Margarine, excluding liquid margarine	23011.00	7265.00	0.00	0.00

'020130	Bovine cuts boneless, fresh or chilled	28223.00	7087.00	0.00	0.00
'121190	Plants &pts of plants	12344.00	6734.00	0.00	0.00
'151620	Veg fats &oils	32145.00	6325.00	0.00	0.00
'330129	Essential oils, nes	23932.00	5319.00	0.00	0.00
'180690	Chocolate and other food	12978.00	5100.00	0.00	0.00
'190590	Communion wafers	83713.00	4974.00	0.00	0.00
'200820	Pineapples	7716.00	4784.00	0.00	0.00
'040210	Milk powder not exceeding 1.5% fat	188635.00	4620.00	0.00	0.00
'190410	Prep foods	31036.00	4291.00	0.00	0.00
'160413	Sardines,sardinella	3030.00	4211.00	0.00	0.00
'090111	Coffee	74440.00	4124.00	0.00	0.00
'040299	Milk and cream	135030.00	3986.00	0.00	0.00
'180632	Choc&food	45657.00	3974.00	0.00	0.00
'020230	Bovine cuts boneless	144898.00	3507.00	0.00	0.00
'040690	Cheese nes	128752.00	3373.00	0.00	0.00
'210610	Protein concentrates	3673.00	3353.00	0.00	0.00
'040221	Milk and cream powder unsweetened exceeding 1.5% fat	226424.00	3233.00	0.00	0.00
'151590	Veg fats&oils nes	7838.00	3215.00	0.00	0.00
'071080	Vegetables, frozen nes	3745.00	3099.00	0.00	0.00

Annex 5: Regional and international relations^{85 86}

Bahrain, Kuwait, Oman, Qatar and the United Arab Emirates, together with Saudi Arabia form the Gulf Co-operation Council (GCC). The GCC has taken major steps towards becoming a full customs union, which would abolish customs duties and trade restrictions among the constituent states, and implement common customs duties and external trade regulations. The GCC has first eliminated internal tariffs on goods with at least 40% of their value added within the GCC, and they agreed in December 2001 to unify regional customs tariffs for standard non-GCC goods from beginning on January 2003.

In December 2008 a GCC free-trade agreement (FTA) was agreed with Singapore. In May 2009 the United Arab Emirates have withdrawn from plans that the GCC form a Gulf monetary union.

Citizens of GCC countries may conduct approved business activities within its borders. Individuals or establishments from GCC countries may pursue contracting activities in the kingdom without using a sponsor or agent. Wholesale and retail trade in products manufactured within the GCC is permitted.

Saudi Arabia is a founding member of OPEC and is normally the driver behind pricing decisions. Historically it maintained spare capacity sufficient to alter production levels to smooth market fluctuations. This spare capacity has been strained in recent years. However, Saudi Aramco the state oil firm is close to completing a major investment programme that should boost its spare crude oil capacity again.

Saudi Arabia is also at the centre of efforts to establish a single Arab market drawing together all the regional states into a single economic union.

Bilateral agreements with the following regional states have been signed: Algeria, Egypt, Iraq, Jordan, Lebanon, Morocco, Syria, Tunisia and Yemen (Iraq's present condition leaves in doubt the status of its agreements).

In December 2005 Saudi Arabia has joined the World Trade Organisation (WTO). It has enacted on more than 40 trade-related laws since accession, with the hope of making the economy more open to foreign business. In June 2009 the third phase of custom reduction as agreed with the WTO took place, at which point 851 products enjoyed tariff exemptions or reductions.

The Saudi Arabian Monetary Agency (central bank) is since September 1996 a member of the Bank for International Settlements (BIS). BIS consist out of 9 major non-OECD countries and give guidelines for commercial banks.

Bilateral Agreements between Saudi Arabia and South Africa⁸⁷

The following bilateral agreements have been signed between South Africa and Saudi Arabia:

- Protocol on the Establishment of Diplomatic Relations, signed in October 1994
- Agreement on Economic, Trade, Investment and Technical Co-operation plus Protocol, signed on 20 May 1995, but entered into force in May 2002.

⁸⁵ Country Commerce: Saudi Arabia - May 2008. The Economist Intelligence Unit. www.eiu.com

⁸⁶ Country Forecast: Saudi Arabia - July 2009. The Economist Intelligence Unit. www.eiu.com

⁸⁷ DFA Country Profile - Saudi Arabia. April 2009

- MOU concerning co-operation in the Military Field, signed in September 2003.
- Bilateral Air Services Agreement, signed in May 2000
- MOU between the Council for Scientific and Industrial Research (CSIR) and the King Abdulaziz City for Science and Technology, signed in July 1999.
- MOU on Cooperation in the Field of Higher Education, signed in December 2006
- Agreement on the Avoidance of Double Taxation, signed in March 2007
- Agreement on Cooperation in the Field of Science and Technology, signed in February 2009.

The following agreements are still under discussion:

- Agreement on Co-operation in the Field of Sport
- Agreement in the Field of Merchant Shipping and Related Maritime Transport Matters
- Agreement for the Promotion and Reciprocal Protection of Investments
- Agreement on Police Cooperation / Combating Crime
- MOU on Bilateral Consultations between the Ministries of Foreign Affairs
- Agreement on Cooperation in the Field of Arts and Culture
- Agreement on Mutual Legal Assistance
- Renewal of the Bilateral Air Services Agreement
- MOU on Tourism Cooperation
- Twinning Agreement between the Western Cape and the Makkah Region

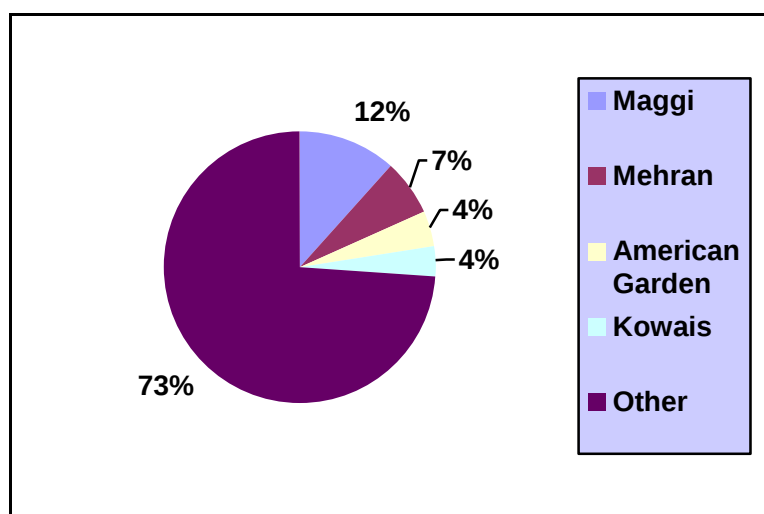
Annex 6: Sales of Sauces, Dressings and Condiments by Subsector Value 2006-2008

SR million	2006	2007	2008	2003-08 CAGR	2008-13 CAGR
Tomato pastes and purées	163.01	175.62	189.84	7.47	9.24
Bouillon/stock cubes	153.99	160.45	173.25	4.84	8.91
- Stock cubes	151.91	158.29	170.99	4.84	8.94
- Gravy granules	2.08	2.16	2.25	4.60	6.50
- Liquid stocks and fonds	-	-	-	-	-
Herbs and spices	366.66	397.18	419.85	6.23	7.08
Monosodium glutamate (MSG)	-	-	-	-	-
Table sauces	69.67	71.10	74.33	2.83	5.90
- Barbecue sauces	11.89	12.27	12.80	3.65	4.79
- Chili sauces	45.95	46.73	48.87	2.40	6.28
- Steak sauces	6.94	7.25	7.62	5.25	5.88
- Other table sauces	4.89	4.86	5.04	1.67	4.92
Soy based sauces	21.57	22.75	23.93	5.98	6.95
Pasta sauces	8.60	8.95	9.42	5.24	5.64
Wet/cooking sauces	51.40	52.92	55.57	5.26	5.23
Dry sauces/powder mixes	-	-	-	-	-
Ketchup	76.51	77.98	82.64	3.14	5.55
Mayonnaise	38.21	40.34	42.39	6.19	9.18
- Regular mayonnaise	34.47	36.38	38.13	5.99	5.54
- Low fat mayonnaise	3.74	3.96	4.27	8.02	30.03
Mustard	3.10	3.19	3.32	3.83	4.33

SR million	2006	2007	2008	2003-08 CAGR	2008-13 CAGR
Salad dressings	15.88	16.25	16.94	3.73	5.37
- Regular salad dressings	14.33	14.65	15.25	3.57	5.35
- Low fat salad dressings	1.55	1.60	1.69	5.23	5.50
Vinaigrettes	8.06	8.25	8.72	3.64	5.79
Dips	67.86	70.56	74.67	5.55	5.39
Pickled products	144.22	149.83	158.96	4.41	6.14
Other sauces, dressings and condiments	-	-	-	-	-
Sauces, dressings and condiments	1,188.74	1,255.38	1,333.85	5.43	7.24

Source: Official statistics, trade associations, trade press, company research, store checks, trade interviews, Euromonitor International estimates

Annex 7: Brand share of the major role players in the market for Sauces, Dressings and Condiments (%)



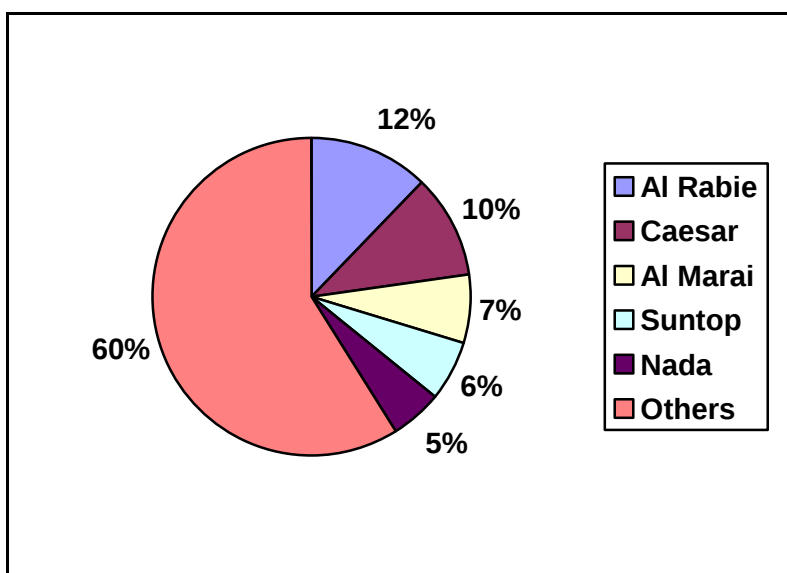
Annex 8: Sales of Juices by Subsector: Value 2006-2008

SR million	2006	2007	2008	2003-08 CAGR	2003/08 TOTAL
100% juice	1,358.0	1,450.1	1,548.5	7.0	40.0
- Not from concentrate 100% juice	252.7	275.2	301.0	7.3	42.0
- Reconstituted 100% juice	1,105.3	1,174.8	1,247.4	6.9	39.5
- Frozen 100% juice	-	-	-	-	-
Nectars (25-99% juice)	204.4	216.7	230.6	6.5	36.8
- Unfrozen nectars	204.4	216.7	230.6	6.5	36.8
- Frozen nectars	-	-	-	-	-
Juice drinks (up to 24% juice)	969.5	1,017.4	1,068.7	5.2	28.5
- Juice drinks excluding Asian	969.5	1,017.4	1,068.7	5.2	28.5

SR million	2006	2007	2008	2003-08 CAGR	2003/08 TOTAL
- Frozen juice drinks	-	-	-	-	-
Fruit-flavoured drinks (no juice content)	-	-	-	-	-
Fruit/vegetable juice	2,531.8	2,684.2	2,847.8	6.2	35.2

Source: Official statistics, trade associations, trade press, company research, store checks, trade interviews, Euromonitor International estimates

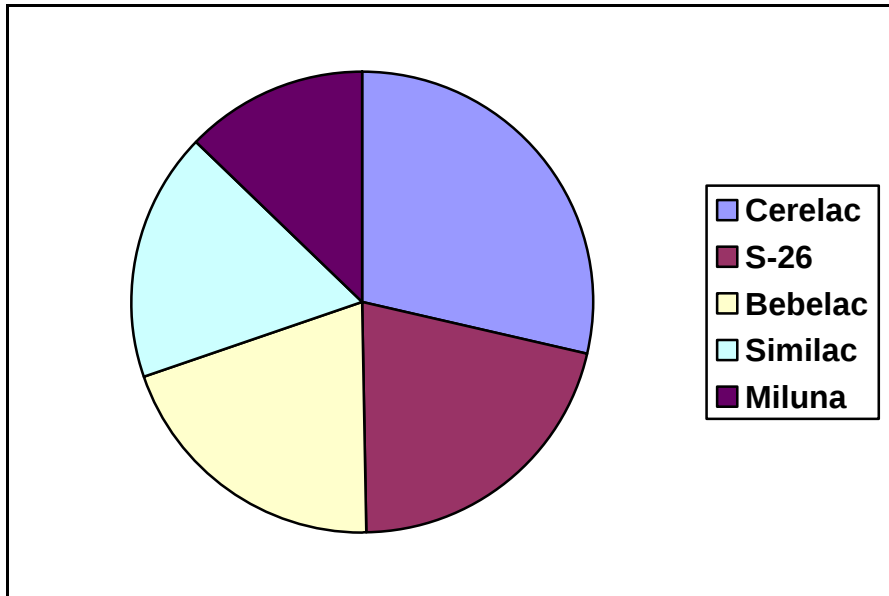
Annex 9: Brand share of the major role players in the Fruit and Vegetable Juice market for 2008 (%)



Annex 10: Sales of baby food by Subsector: Value 2006-2008

SR million	2006	2007	2008	2009	2004-09 CAGR	2009-14 CAGR
Milk formula	741.86	977.34	1,383.68	1,695.04	27.99	7.99
- Standard milk formula	273.58	344.72	489.50	592.29	24.99	7.13
- Follow-on milk formula	177.27	227.62	324.81	396.27	25.83	7.29
- Toddler milk formula	190.59	265.69	371.96	453.79	32.67	8.21
- Special baby milk formula	100.42	139.32	197.42	252.69	31.88	10.53
Prepared baby food	29.46	34.47	42.53	48.70	12.27	1.88
Dried baby food	223.53	259.29	315.30	355.00	10.37	1.48
Other baby food	39.62	47.54	57.67	68.62	22.58	7.40
Baby food	1,034.47	1,318.64	1,799.18	2,167.37	23.24	6.88

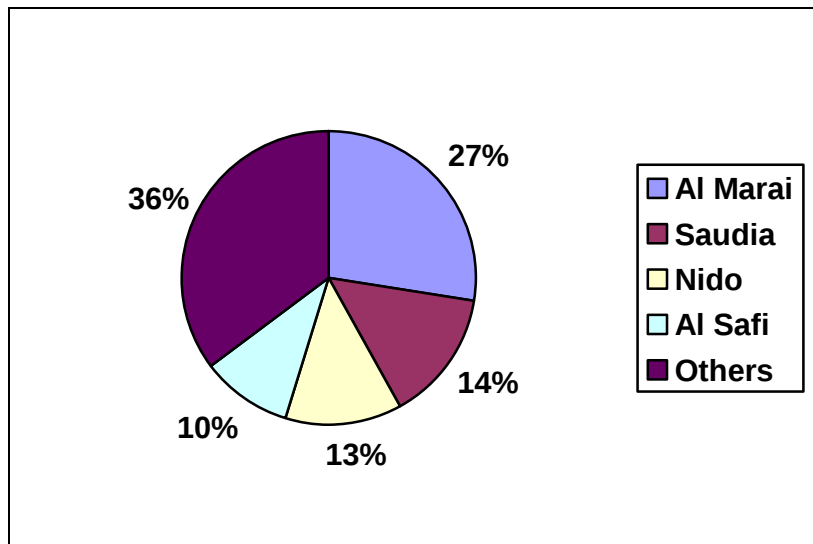
Annex 11: Brand share of the major role players in the Baby Food market for 2008 (%)



Annex 12: Sales of drinking milk products by Subsector: Value 2006-2009

SR million	2006	2007	2008	2009	2004-09 CAGR	2009-14 CAGR
Milk	1,882.54	2,012.16	2,234.80	2,446.66	7.34	3.11
- Fresh/pasteurised milk	1,138.06	1,226.50	1,369.65	1,517.35	7.96	3.22
- Long-life/UHT milk	743.36	784.44	863.81	927.86	6.37	2.93
- Goat milk	1.12	1.22	1.33	1.45	13.26	4.91
Flavoured milk drinks	418.57	447.87	488.18	530.16	6.93	4.03
- Dairy only flavoured milk drinks	418.57	447.87	488.18	530.16	6.93	4.03
- Flavoured milk drinks with fruit juice	-	-	-	-	-	-
Soy beverages	-	-	-	-	-	-
- Soy milk	-	-	-	-	-	-
--Soy drinks	-	-	-	-	-	-
Powder milk	792.16	887.22	1,043.37	1,001.64	6.46	-1.93
Flavoured powder milk drinks	37.41	39.28	41.38	48.03	7.90	6.04
- Chocolate-based flavoured powder drinks	29.50	31.03	32.66	37.97	7.88	6.18
- Non-chocolate-based flavoured powder drinks	-	-	-	-	-	-
- Malt-based hot drinks	7.91	8.25	8.72	10.06	7.98	5.48
Drinking milk products	3,130.68	3,386.53	3,807.73	4,026.49	7.07	2.12

Annex 13: Brand share of the major role players in the Drinking Milk Product market for 2008 (%)



Annex 14: Contact details

- SA Trade representative in Saudi Arabia

Jeddah South African Consulate- General,Khaldia District, Abdallah Aba Al Khail Road, Jeddah, SAUDI ARABIA	Mr Adnaan Grimsel Consul (Economic) Mr Raza Ali Humayun Marketing Officer	Tel 00 966 2 606 5967/606 0299 00 966 2 606 2850/606 5981 Mobile 00 966 5 041 17923 (Grimsel) Fax 00 966 2 692 7712 Email agrimsel@thedti.gov.za
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- Saudi Arabia's Embassy in Pretoria (request for the office of the commercial section or Trade attaché)

Royal Embassy of the Kingdom of Saudi Arabia 711 Duncan Street Cnr Duncan & Lunnon Street Pretoria	Postal Address P O Box 13930 Hatfield 0028	Tel: 012 362 4230 Tel: 012 362 4240 Fax: 012 362 4239 Fax: 012 362 4248
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