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## Greece

### EXPORTER GUIDE ANNUAL

## Road Map to Greece

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**Report Highlights:**

Greece is an import-dependent country with total CY 2008 agricultural Imports from the U.S. of \$ 161 million. The fastest -growing component from the U.S. are consumer ready products, amounting 73.3 million compared to \$ 64.6 million in 2004. Tree nuts are leading the category with an increasing pace (\$ 48.7 million in CY 2008). Considerable amounts of Agricultural and Consumer Oriented products are transited through Greek ports to Balkan States with Poultry meat & meat products leading. Recession developments are already decelerating private consumption in the country, lower investment and a significant drop in exports being among the key factors seen weighing on the economy. This report prepared by the FAS/Athens Office for U.S. exporters provides information on Greece's Economic situation, Market structure, Consumption trends, Exporter tips, Public Health Regulations, Phytosanitary Controls and prospect analysis for high value food and agricultural products.

**Post:**

Athens

**Commodities:**

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## **Executive Summary:**

### **SECTION I. MARKET OVERVIEW**

#### [Economic Outlook](#)

With a population of approximately 11 million, and a GDP of about \$370 billion, Greece is a relatively small country. Greece adopted the euro as its new common currency in January 2002. The adoption of the euro provided Greece (formerly a high inflation risk country under the drachma) with access to competitive loan rates and also to low rates of the Eurobond market. This led to a dramatic increase in consumer spending which gave a significant boost to economic growth. This credit also led to a more relaxed fiscal policy starting in 2002, which, combined with expenditures associated with the preparation of the Athens 2004 Olympics, resulted in excessive deficits and debt in 2003 and 2004. The government deficit in 2004 reached 6.6 percent of GDP. As a result of lower post-Olympic spending and tighter fiscal policies, the government deficit dropped to 3.7 percent of GDP in 2008, with a debt to GDP ratio of 94.6 percent, still among the highest in the Eurozone. Greece has averaged 4 percent GDP growth in the period 1997-2007, almost twice the EU average, but official growth rate projections have declined significantly in early 2009. The rate of growth in the short-to medium-term will be dependant upon the impact and recovery time from the global financial crisis and the resulting economic recession.

The Greek economy is decelerating sharply after economic growth which averaged 4 percent over the past years, helped by EU aid and investments for the Athens 2004 Olympics. The European Commission expects Greece's economy to tip into recession in 2009, for the first time in more than 15 years, due to the ongoing crisis and prevailing uncertainty. In its spring 2009 forecast, the European Commission reported that Greece's economy will shrink at an annual pace of 0.9 percent this year, revising downwards its previously anticipated expansion rate of 0.2 percent, before recovering to a positive growth rate of 0.1 percent in 2010. According to all EU Commission's statements, the Economic growth of Greece, although remaining above the eurozone average, will turn negative in 2009 for the first time since 1993.

Brussels expects total gross domestic product (GDP) of the 16-member eurozone to shrink by 4 percent in 2009 ahead of an anticipated negative growth rate of 0.1 percent next year. Growth outlook for Greece is the second best in the eurozone after Cyprus – the only economy in the single currency club projected to grow this year, according to the Commission.

Shrinking international trade volumes and the deteriorating competitiveness of the Greek economy are likely to result in a decline in exports of goods while receipts from services such

as tourism and shipping are expected to follow a similar path. Tourism and shipping are key components of the Greek economy, accounting for about 17 percent and 7 percent of annual output respectively. The Commission also highlighted “persisting fiscal imbalances” in government finances, forecasting a budget deficit of 5.1 percent this year versus 5 percent in 2008.

Greece’s public debt, the second highest in the eurozone after Italy, is also projected to continue its uptrend, reaching 108 percent of GDP in 2010. According to the central bank (Bank of Greece) exports of goods and services on a constant price basis are expected to fall by 12% in 2009. Average rate of unemployment is estimated to rise to 8.9% in 2009 (approximately 465,000 people), from 7.9% in 2008 (approximately 405,000 people). In 2010, unemployment is expected to rise to 9.4% (approximately 485,000 people).

Year	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
<b>Unemployment Rate</b>	11.8	12.2	12.3	11.2	11.4	10.4	11.3	10.4	9.1	9.1	7.9	8.9	9.4

Source: NSS

According to GOG’s Minister of Finance statements in May 2009, the European Commission’s forecast for Greece does not take into account recent government steps aimed at boosting the economy. GOG Finance Ministry is more optimistic and anticipates an expansion rate of 1.1 percent for 2009 emphasizing that the EU Commission does not take into account recent measures taken by GOG to support growth, such as actions to boost construction activity, the car market and labor market. These measures include subsidization of loans and increase tax benefits for property buyers in an attempt to boost the construction sector following recent cuts in registration tax for new cars. GOG has announced a 2.5-billion-euro program aimed at stemming rising jobless numbers. GOG will assess in June 2009 the course of the economy and will move ahead with necessary adjustments.

### [Consumption trends](#)

Recession developments are already decelerating private consumption, lower investment and a significant drop in exports being among the key factors seen weighing on the economy.

Consumption confidence in Greece fell in the third and fourth 2008 quarters and continued through 2009 due to more business failures and job losses, the deteriorating economic news which talk for more severe economic downturn than was initially thought, problems in the banking sector and low levels of consumer lending.

According to the National Statistical Service of Greece (NSS) the consumer price index (CPI)

rose 1% year-over-year in April 2009, slower than the 1.3% increase in the previous month. A year ago, the CPI was up 4.4%. For May 2009 the CPI is expected to drop by 0.3% compared to that in April due to drop of milk prices and of other food products. Most sources predict that CPI based inflation will drop to 0.8% by July 2009 and start rising again during the final months of the year. Consequently, average inflation for 2009 is now estimated at 1.4%, assuming that the average oil price doesn't exceed \$55 a barrel. Moreover, structural inflation is expected to further drop to 2.5% in July 2009, to 2.3% in December 2009 and to a yearly average of 2.7%.

Consumer general buying and diet habits were affected by the credit crunch in 2009 with consumers turning away from non-essential products. People are spending less and this is expected to continue into the second half of 2009. A birth of a new type of savvy consumer is observed who knows what stores to go to, at any given time, to get the best deals. Surveys show that 86 percent of consumers have trimmed expenses on entertainment, while four in five currently spend less on clothing. Close on half have reduced their food bills EU based Grocery retailer chains (in Belgium & Germany) have announced plans to open "discount store" chains in Greece, initially with pilot outlets likely to perform well in the face of growing economic uncertainty.

FAS Athens believe that lifestyle indicators for Greece provided in Table 2 below, for the 2009 are subject to revision (all downwards except internet user numbers).

<b>Table 2. Lifestyle indicators</b>					
	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>
<b>Consumer expenditure on food (US\$ million)</b>	25,924.4	28,197.4	32,006.8	35,420.8	34,721.9
<b>Internet users ('000)</b>	2,001.00	2,048.08	2,312.00	2,623.48	2,948.00
<b>New registrations of passenger cars ('000)</b>	269.73	267.70	279.75	276.41	
<b>Consumer electronics (EUR million)</b>	848.52	925.44	987.60	1,039.19	
<b>Dog and cat food (EUR million)</b>	80.83	80.96	81.27	81.85	82.65

Source: World Economic Factbook

### [Structure of the Economy](#)

Greece has a predominately service economy, which (including tourism) accounts for over 73 percent of GDP. Almost nine percent of the world's commercial shipping is Greek-owned, making the Greek commercial fleet the largest in the world. Other important sectors include food processing, tobacco, textiles, chemicals (including refineries), pharmaceuticals, cement,

glass, telecommunication and transport equipment. Agriculture output and Fisheries (both aquaculture & open sea) have steadily decreased in importance over the last decade, accounting now for only 5 percent of total GDP. The EU is Greece's major trading partner, with more than half of all Greek two-way trade being intra-EU. Greece runs a perennial merchandise trade deficit and 2008 imports totaled \$88 billion against exports of \$25 billion. Tourism and shipping receipts together with EU transfers make up much of this deficit. In 2008, Greece's trade deficit with the U.S. was \$1.1 billion. U.S. exports to Greece reached \$2.4 billion accounting for 2.7 percent of Greece's total imports in 2008. Greek exports to the U.S. were \$1.3 billion in 2008, 5.1% of Greece's total exports.

### [Greece's Role in the Balkan Region](#)

Greece has been aggressively capitalizing on its position as an investment leader in the Balkans, marketing its expertise to Western companies looking to expand into that region. Over the past 15 years, Greece has become one of the top five investors in the area. Greece's role as the economic engine of South-East Europe creates a significant multiplier effect for businesses that want to operate throughout the Balkan region and benefit from regional market access. As Greece's neighbors develop market economies, create a new generation of entrepreneurs, and generate an important consumer base, businesses based in Greece enjoy multiple advantages for market penetration compared to other EU Member states in the Eurozone. The total consumer population of the Balkans and the Black Sea region is estimated at 320 million people with a GDP of USD 2,296 billion. More than 2,500 Greek companies have invested in sectors that show favorable growth prospects and that are in need of improvement and upgrading. Among the many areas of investment are food and beverages, retail and wholesale trade, packaging and packaging equipment, tobacco, agriculture, and fishing. Romania, Albania, Bulgaria and FYOM are the countries where most of investments took place since early 1990s.

The port of Thessaloniki serves the growing needs of Northern Greece, and the countries of the Balkan Peninsula and Southeast Europe, for the import and export of raw material and consumer products. The development prospects of the port increase as the economies of these countries stabilize and gradually grow. The port's annual throughput is about 15 million MT of cargo (6.9 MT of which are dry cargo) and 320,000 TEUs (Twenty feet Equivalent Units) containers. It serves more than 3,000 ships and 230,000 passengers annually.

The Port of Thessaloniki has six piers with a total quay length of 6,200 meters and a sea depth of up to 12 meters. It has a 600,000m<sup>2</sup> area of covered and open air storage and modern mechanical equipment for handling of all cargo—general, bulk, and containers. The port has a railway network in all of its piers and excellent access to road and railway networks (East-West via the newly constructed 600 miles Egnatia Highway, South-North via the P.A.Th.E. highway network) and the European corridors IV and X. Among the port's advantages is its Free Zone (Control Type I), which operates according to the EU customs code.

Port of Thessaloniki maintains its comparative advantage in container handling in the hinterland. Increasing U.S. demand-driven container traffic through the port is reported for over a decade with numerous U.S. products transited through Thessaloniki. Over 50,000 MT/annum of U.S. Meat and products find their way to neighboring Balkan countries and the former Soviet Republics through Thessaloniki. In a smaller scale, along the western coast the ports of Patras, Igoumenitsa and Astakos facilitate large proportion of transited trade to Albania and Bulgaria.

### [EU Funding](#)

Greece continues to be a major recipient of EU assistance funds. EU transfers to Greece (20 billion in 1994-99, \$24 billion in 2000-2006 and another \$24 billion for 2007-2013) contribute significantly to Greece's current accounts balance and further reduce the state budget deficit. EU funds will continue to finance major public works and economic development projects, upgrade competitiveness and human resources, improve living conditions, and address disparities between poorer and more developed regions of the country.

GOG's economic policy remains absolutely focused on controlling and further reducing the fiscal deficit and this policy is not only the result of the country's obligations (in the framework of an EU Stability and Growth Pact) but also reflects the deep conviction that reducing the deficits and achieving balanced budgets will benefit the economy and ensure sustainable growth.

### [Key Demographic Trends](#)

As of January 2008, the population of Greece is estimated at 11,262,000 by Eurostat (compared to 10,964,020 in 2001). Of those, 58.8% live in urban areas, whereas only 28.4% live in rural areas. The population of the two largest cities in Greece, Athens and Thessaloniki, almost reached 5 million in 2009. Although the population of Greece continues to grow, Greece faces a serious demographic problem. Y 2002 was the first year where the number of deaths surpassed the number of births.

Greeks work an average of 40.7 hours per week for 44.6 workweeks/annum, as compared with the EU-27 average of 40.0 hours or 1,816 hours/annum placing Greece high in the list in the EU with Poland being first (1,817 hours).

A large number of immigrants live in Greece, estimated at over one million. About 65% have come from Albania. Most Greeks nowadays recognize Albanian's contribution to the Greek economy. There are smaller numbers of immigrants from Bulgaria, Serbia, Romania, Pakistan, Ukraine, Belarus, Georgia, Poland, Egypt, Palestine, Ethiopia, Bangladesh, Afghanistan, Philippines and China. The exact number by ethnic group is not known, since the majority live illegally in Greece. The largest percentage of immigrants is mainly occupied in farming &

fisheries sectors, the private building Industry and public works. Greece, being suffering the most from illegal immigration pressure, is a strong supporter of EU Policies for a sustainable development of agriculture in Africe & Asia in order to end poverty and hunger and reduce migration to other parts of the world, in particular Europe. However, this goal will require the fulfilment of the existing commitments of the international community, including commitments assumed by the EU (i.e. no less than a 50% share in the increase of foreign development aid by 2010).

Structure of Greek population by sex and demographic information as compared to basic economic indicators are given in Tables 3 and 4 below. Demographic & Economic indicators for Greece provided in Table 4 below for 2009 are subject to several corrections by the end of the year.

<b>Table 3. Estimated Population of Greece by sex (in million)</b> (at 1 <sup>st</sup> January for the years 2002-2008)							
	2002	2003	2004	2005	2006	2007	2008
<b>Greece total Both sexes</b>	10.9	11.0	11.0	11.0	11.1	11.1	11.3
<b>Males total</b>	5.4	5.4	5.4	5.4	5.5	5.5	5.6
<b>Females total</b>	5.5	5.5	5.5	5.5	5.6	5.6	5.7
<b>Greece total Both sexes</b>	10.9	11.0	11.0	11.0	11.1	11.1	11.3
<b>Males total</b>	5.4	5.4	5.4	5.4	5.5	5.5	5.6
<b>Females total</b>	5.5	5.5	5.5	5.5	5.6	5.6	5.7

Source: NSS

<b>Table 4. Demographic and economic indicators</b>					
	2005	2006	2007	2008	2009
<b>Population aged 65+: January 1st ('000)</b>	2,006.98	2,059.80	2,069.23	2,084.17	2,093.36
<b>Population density (people per sq km)</b>	85.98	86.31	86.65	86.98	87.29
<b>GDP measured at purchasing power parity (million international \$)</b>	281,545.58	303,281.22	323,660.00	340,721.09	345,117.52
<b>Real GDP growth (% growth)</b>	3.83	4.20	4.00	2.90	0.20
<b>Annual rates of inflation (% growth)</b>	3.56	3.20	2.90	4.20	2.50
<b>Consumer expenditure (US\$ million)</b>	184,178.27	201,414.06	233,163.76	263,016.27	262,655.84
<b>Annual gross</b>	209,627.72	228,829.39	266,742.40	301,117.02	300,051.86

<b>income (US\$ million)</b>					
<b>Annual disposable income (US\$ million)</b>	163,658.93	179,476.11	209,653.35	238,032.18	239,220.61

Source: World Economic Factbook

### [Advantages and Challenges for U.S. Exporters in Greece](#)

<b>Advantages</b>	<b>Challenges</b>
Implementation of the EU new CAP since 2006 and Economic crisis have brought changes in the Greek market which have differentiated demand for imported goods	A gradually increased demand for new crop planting seeds & propagation material (Sunflower, rapeseed, pulses, sweet sorghum, forage plants, tree nursery products, etc), raw material for biofuel production (vegetable oils, oilseeds for crushing, other) and a wide variety of basic food items and animal feed. U.S. suppliers can satisfy demand for certain products.
Although Imports in the primary and secondary sectors have dropped due to the crisis, it is expected that they will recover gradually starting with the forth quarter of 2009, where consumption trends will improve.	There is increasing competition from EU-origin imported foods and from neighboring third countries witch have signed preferential trade agreements with the EU. Only a limited number of importers and distributors are aware of the varied and innovative U.S. food products that can be exported to meet Greek needs. The high reputation of U.S. high valued food products, beverages and food ingredients for the domestic food industry is well known and U.S. firms need to invest on that.
Greece's established tourist base for 16 million visitors per year may not achieve its target in 2009; bur surely is expected to growing in popularity following the 2004 Athens Olympics, resulting in the expansion of an important market for U.S. exports.	Although climate of uncertainty and insecurity is prevailing in the Greek tourism sector as a result of a global economic crisis, planning long term, there is always a need to educate the Greek catering sector representatives about the high quality, variety and availability of U.S. food products. U.S. exporters need to focus on innovative products to tempt Greek traders.

<p>The exchange rate between the dollar and the euro favors U.S. exports.</p>	<p>Price factor is determinant when choosing food products for both the HRI and the Food Industry sectors. Recently, the “nutritional content factor” becomes equally important for the Greek consumer. Although not all, food products labeled with nutritional content information become popular (mainly pre-packed items and meals)</p>
<p>Greek importers favor U.S. products because of good quality and wider variety.</p>	<p>Average tariff levels remain high, resulting in an increase to the products’ price. GMO free requirements, on the other hand, result in consumer concern and in some cases an outright ban of food ingredients from the Greek market (i.e. soy sauce &amp; powders, corn flower, etc)</p>
<p>The Geographical location of Greece in the Balkan peninsula, the availability of easily accessed port facilities, infrastructure and its investment leadership in the Balkans. Greece has three free trade zones, located at the Piraeus, Thessaloniki, and Heraklion port grounds. Goods of foreign origin may be brought into these zones without payment of customs duties or other taxes and are free of all duties and taxes if subsequently transited or re-exported. Documentation related to the goods within zones is free from stamp taxes. Handling operations are carried out according to EU regulations 2504/88 and 2562/90. Transit goods may be held in the zones free of bond. The zones may be used for re-packing, sorting and re-labeling operations. Storage time is unlimited, as long as warehouse charges are promptly paid every six months. Deep freezing facilities are available in ports. When additional capacity is needed, port authorities proceed with rentals outside free zones.</p>	<p>W. Balkan Region (Albania, Bosnia – Herzegovina, FYROM, Serbia, Montenegro, Kosovo &amp; Croatia) are net importers of Agricultural commodities and processed food products. Greece is the oldest EU Member State in the region. Its strategic geographic location grew in importance since the 80s as it established the South-East border of the EU. This border position is making Greece a bridge for foreign exporters and investors in new EU Balkan states (Bulgaria and Romania), the W. Balkans, Russia, Black sea States and Near East. U.S. products transited through Greek ports are mostly meat (pork &amp; poultry) other consumer-ready foods &amp; other bulk commodities (mainly grain feeds &amp; Food AID).</p>

**SECTION II. EXPORTER BUSINESS TIPS**

## Customs (Tariffs & None Tariff barriers)

Tariffs are based on the Harmonized System, with duties levied on imports from non-European Union (EU) on an ad valorem cost, insurance and freight (CIF) basis. Import duty is five to seven per cent for most products when charged. Most raw materials for manufacturing input can be imported without duties, or with very minimal duties only. Preferential tariffs and EU trade barriers are applied.

Greece is a World Trade Organization (WTO) member and applies both European Union (EU) mandated and Greek government-initiated trade barriers. As a member state of the EU since January 1981, is fully harmonized with EU regulations, directives and legislation pertaining Agricultural production, Ag Trade and Food. Import licenses are required for all agricultural commodities, processed food products & ingredients. Special licenses and phytosanitary certification are required for imports from third countries where certain plant and animal diseases occur. Special import licenses are required for goods, including plant propagation material, seeds, textiles, meat products, pet foods & wood products, while aflatoxin content certificates are required for all tree nuts imported from third countries including the U.S. A number of products are under surveillance according to EU quotas (i.e. beef meat). Exporters to Greece must seek advice from importers on the quota system for certain goods.

Most agricultural product imports are covered by the Common Agricultural Policy (CAP), under which many items (including cereals, rice, milk and milk products, beef and veal, olive oil, dried fruit, and sugar) are subject to variable levies and a complicated protection system. Occasionally, non tariff barriers are imposed by GOG in an attempt to protect local production in years when stocks are piling (i.e. grain imports from third countries priced at lower levels from that domestically produced). Non tariff barriers are imposed in the form of intensified sampling and laboratory testing for GMO, heavy metals, radioactivity, plant disease and aflatoxin content. Most frequently such strict controls take place for cereal shipments from third countries (originating mostly in the Black sea, Romania, Bulgaria and Kazakhstan).

Greece has not been responsive to applications for the introduction of genetically modified seeds for field tests despite support for such tests by Greek farmers and the Scientific Community.

General Consumer tastes and preferences – Food safety issues

Although indicators show a decline in 2008 and 2009 due to recession:

The average size of Greek household is 2.5 persons compared to 3.5 persons 12 years earlier. Disposable incomes increased until mid 2008 and slightly through the first and second quarters of 2009

Dual-income families increase, an increase in one-member households, and an increase in single parent households have resulted in expanded demand for consumer-ready products and

restaurant meals (45 percent of the female population is working outside home).

These developments allowed room for higher quality food consumption. Greek consumer preferences are moving towards easy-to-prepare meals and foods that deliver more health benefits. Greek diet is rich in vegetables, fruits, beans, whole-grain breads and olive oil, contains a moderate amount of fish and dairy products and is low in meat mainly white meats, sheep & goat. Wine is consumed in moderation and generally during meals. Food scares (anti GMO propaganda, BSE, Dioxins, Bird Flu and H1N1) have caused the higher-income population to seek healthier and organic foods, increasing the demand for such products, as well as the demand for health food supplements and functional food ingredients and preparations.

Greeks are reported to be the largest consumers of tree nuts, (8 kg per capita as snack and confectionary), while the per capita cheese and fish consumption each exceeds 24 kg.

### [Food standards and Regulations](#)

All food items entering the consumption chain are subject of further controls by the Hellenic Agency for Food Control (EFET). EFET is an agency which belongs to the Ministry of Agriculture, responsible for the enforcement of food hygiene and labeling EU and National legislation. Sampling and testing of displayed food items (in wholesale or retail stores) take place at random basis or after a complaint by individuals or consumer organizations. The National Organization on Pharmaceuticals (EOF) cooperates with NCL on cases pertaining licensure, distribution and use of food supplements for health purposes, either domestically produced or imported.

### [General Import and Inspection Procedures](#)

Authorities in charge of import controls at customs are:

GOG Min Ag Veterinary Service (Public health certification controls),  
GOG Min Ag Phytosanitary Division (Phytosanitary Certificate controls) and  
National Chemical Laboratory (NCL at Customs, Food Code compliance).

Customs implement EU Certification Regulations requiring imported products to be accompanied by the proper documents (EU Certificate models in effect for either domestic use or transit).

Specific agricultural and food products which are subject to inspections and Greek restrictions include:

**Poultry, Meat, Fish, Dairy, Egg:** Products of third country origin must originate from plants

& approved facilities included in the EU list.

**Enriched/Bleached flour:** Greek regulations prohibit the importation of any products made from or including enriched/bleached flour.

**Corn flour:** When product originates from a GMO none approved variety by the EU.

**Grain & Feed** for GMO contamination, heavy metals, aflatoxins, plant disease and radioactivity.

**Nuts:** Imported nuts are subject to a random aflatoxin test at entry or at selling points. At port, usually one out of ten containers is sampled for aflatoxin. Public health certificates for row nuts imported into Greece are required in accordance with EU legislation in effect issued by accredited laboratories in the country of origin. GOG National chemical Laboratory can sample and test upon arrival.

**Seeds:** Greek authorities require non-presence of transgenic material for imported cotton seeds, while for corn seeds the tolerance level set is 0.5% for corn varieties registered into EU variety catalogues.

**Milling wheat & Wheat seeds:** are tested on a random basis for Karnal bunt, even if they are accompanied by USDA/APHIS phytosanitary certificates.

GMO **seed varieties:** registered elsewhere in the EU (in Other Member State variety catalogues) are not permitted for importation and/or use in Greek soil including Monsanto's genetically engineered corn varieties registered in France.

**Products derived from genetic modification:** Biotech products are handled strictly.

Exporters are advised to have an experienced agent or joint-venture partner, with a suitable background, experience and extensive sales/service network, who can offer full support to the end-user.

More information on Procedures for Importers:

For Veterinary Public Health Certification, contact: [ka6u045@minagric.gr](mailto:ka6u045@minagric.gr)

For Phytosanitary Certification and Inspection matters, contact:

[syg053@minagric.gr](mailto:syg053@minagric.gr), & [ve46u030@minagric.gr](mailto:ve46u030@minagric.gr)

For Inspection matters and control procedures are also offered in GR4021 (FAIRS report) and EFET ([http://www.efet.gr/index\\_en.html](http://www.efet.gr/index_en.html)),

On Customs, Import taxes, levies and tariffs, the data base of:

TARIC-ECICS-EBTI, at

<http://www.europa.eu/int/comm.taxation-customs/ddw/el/home.htm>

For the National Chemical Laboratory of Greece (NCL):

[http://www.gcsl.gr/index.asp?a\\_id=136](http://www.gcsl.gr/index.asp?a_id=136)

& NCL Food Division: [http://www.gcsl.gr/index.asp?a\\_id=154](http://www.gcsl.gr/index.asp?a_id=154)

Hellenic Union of Food Industries: <http://www.sevt.gr/site/content.php>

### SECTION III. MARKET SECTOR STRUCTURE AND TRENDS

Tourism and the HRI Sectors offer the best opportunities for new sales. Greece ranks in the top 15 destinations worldwide. Greek tourism sector is a continuous growth market and represents 18% of the country's GDP. Most optimistic sources forecast annual arrivals by 2010 to approach 20 million. International investors from Europe, USA, South Africa and Australia have shown interest in integrated resorts which include golf course estates, conference centres, spas, marinas, ecotourism, thematic tourism etc. Under the economic circumstances, foreign investment inflows are slowing down. For 2008, total Foreign Direct Investment (FDI) to Greece is reported at 6.5 billion Euros (gross inflows) of which about 11% was in the Food & beverage sector.

Food and beverage is the most dynamic and high growth sector in Greek manufacturing. Twenty-five percent of the most profitable Greek companies are food and beverage companies. Production growth rate is almost double that of the entire manufacturing industry. Even with EU expansion, production costs remain among the most competitive in the EU and still maintain high standards. Greek-based companies have developed an extensive import-export network which covers Southeast Europe and the Middle East. Multinationals such as Nestle, Cola-Cola, Pillsbury, Barilla manufacture in Greece and supply both the domestic and emerging regional markets.

#### Competitive advantages

- Availability of quality raw materials
- A large cluster of suppliers and advanced know-how
- Untapped regional markets
- Worldwide recognition of Mediterranean diet and its products
- High Greek consumer awareness of international brands
- Competitive labor costs
- Emerging markets in the Balkans

#### Investment opportunities

- Mediterranean food products
- Organic food
- Ready made meals

- Frozen food
- Baby food
- Tree nuts
- Chocolate, ice cream and confectionary
- Food ingredients
- Diverse snack foods

There is a widely accepted and continued reliance on raw agricultural products which suggests that the Greek food and drink industry has not made the most of many opportunities in the processed foods sector. Most studies conclude that the country's comparative advantages, particularly in the areas of aquaculture and agriculture, should be capable of supporting a food and drink sector that is much larger than is evident today. These facts allow plenty of room for investments and opportunities in the Greek food and modern agricultural sectors (including new alternative land uses on contracted agriculture, organic agriculture and advanced food processing).

Studies show that over 40% of the Greek consumers read food labels. However, 9 out of 10 consumers want food labels to be more clear, informative and understandable for the average person. The majority of consumers purchase food items once a week in super market or "neighborhood" open markets mostly for their fresh fruit and vegetable supplies. Consumer loyalty to well-known brands, which have dominated the market for a number of years, seems to be weakening due in part to economic recession and also to an increase in lower-priced private label products. In the past five years, sales of private label brands spread rapidly and today occupy a bigger share of the market. Estimates indicate that big supermarket chains in Greece carry more than six thousand private labeled products.

Crisis brings changes in consumers' habits and sales strategies. Hard discounters report sales increase, while private label market shares in some product categories exceed 20%-30% and their turnover in Greek market is estimated at 1.7 billion Euros approximately (2008). For the first half of 2009, private label sales increase with a growth rate of 20%-25% in comparison to 2% of branded products.

In 2008, supermarkets have strengthen their position as the leading retail distribution channel for packaged food, with competitive discount policies and private label product launches answering the needs of economically challenged Greek consumers. It is estimated that immigrants make almost 6% of the annual turnover of the supermarkets. In food category this percentage amounts at 7.5%. Financial immigrants correspond to 40%-50% of each store's visitors. As a result, chains organize special "ethnic" shelves for their preferences, especially for the national groups with intense participation per region in the country's population.

Greeks have started to demand more eco-friendly retailing. The catastrophic fires of 2007, the increasing television shows and documentaries with regard to environmental issues and the global convention on ecology, have finally made an impact on consumers' consciousness.

Malls and new commercial areas have been expanding during the last years in Greece, changing radically the image of Greek retail industry. Malls absorb 35% of the country's total retail sales, while this percentage rises to 70%, if multi stores and big chains turnovers are taken into account.

Internet sales record a slow but steady increase. Greeks are increasingly keen on using the internet (about 2.7 million users), especially the younger generation. Moreover, many tourism-related companies have taken advantage of the subsidies given by the Greek government to develop internet communications and related activities. Independent hotel and apartment owners, car rental owners and small travel agents were those that benefited the most from this opportunity.

#### SECTION IV. BEST CONSUMER ORIENTED PRODUCT PROSPECTS

<b>Product Category</b>	<b>2008 Market Size (Volume)</b>	<b>2008 Imports (\$Million Sales)</b>	<b>3-Yr. Avg. Annual Import Growth</b>	<b>Import Tariff Rate</b>	<b>Key Constraints Over Market Development</b>	<b>Market Attractiveness for USA</b>
<b>Pulses</b>	37,800 MT	\$ 46.6	+ 7.00 -8.00% Growth per annum	As in Common Customs Tariff of the EU (CCT)	Competition from Canada, Turkey and neighboring Balkan states	Demand for pulses will stay stable with a tendency to rise being traditional food. This will provide opportunities for U.S. suppliers for increasing their share.
<b>Rice</b>	25,000 MT	\$ 30.7	-30%	As in Common Customs Tariff of the EU (CCT)	Mature traditional demand exists with no major stimulant to boost growth potential.	Attractive to U.S. suppliers (most supplies of U.S. labeled high valued packed products enter Greece through EU)
<b>Snack Food</b>	73,985 MT	\$ 328.88	+8%	As in Common Customs Tariff of the EU (CCT) depending on product	The retail market for snack foods is a steadily developing market, subject to the health of the economy.	This market is likely to become more dynamic as tourism sector recovers & gains ground.
<b>Soybeans</b>	347,968 MT	\$ 196.5	stable	As in Common Customs Tariff of the EU (CCT)	GMO comingled product	Shipments with GMO crop content have negatively affected US exports to Greece
<b>Wine &amp; Beer</b>	74,925 MT	\$ 133.3	+ 8%	As in Common Customs Tariff of the EU (CCT)	The retail market for wines & beer is a steadily developing market, subject to the health of the economy.	likely to become more dynamic as tourism sector recovers & expands
<b>Hardwood</b>	3,000 MT	\$ 94.5	+45%	As in	Mature traditional	Likely to become

<b>Lumber</b>				Common Customs Tariff of the EU (CCT)	demand exists with potential.	more dynamic as construction sector recovers & expands
<b>Panel Products including Plywood</b>	89,243 MT	\$ 261.4	+20 %	As in Common Customs Tariff of the EU (CCT)	Mature traditional demand exists with potential.	Likely to become more dynamic as construction sector recovers & expands
<b>Softwood and Treated Lumber</b>	21,211 MT	\$ 160.2	-5%	As in Common Customs Tariff of the EU (CCT)	Mature traditional demand exists with potential.	Likely to become more dynamic as construction sector recovers & expands
<b>Tobacco &amp; Products</b>	41,719 MT	\$ 173.5	+ 11%	As in Common Customs Tariff of the EU (CCT)	High demand for filling tobacco types expected to drop with new antismoking regulations effective July 2009	Significant drop of consumption with new antismoking regulations effective July 2009. Greek cigarette exports to Balkan countries will continue with U.S. blends expected to be purchased in relatively reduced quantities
<b>Salmon</b>	4,858 MT	\$ 39.75	+18%	As in Common Customs Tariff of the EU (CCT)	High demand will continue. Competition from Canada, Scotland, Scandinavia	Market for U.S. products likely to become more dynamic after the economy recovers
<b>Pet Foods</b>	95,312 MT	\$ 117.5	+ 6.0%	As in Common Customs Tariff of the EU (CCT)	Mature traditional demand exists for all tree nuts (almonds, walnuts, hazelnuts, tropical nuts)	Attractive to U.S. suppliers. High potential for expansion as the economy recovers
<b>Tree nuts</b>	23,577 MT	\$ 125.7	+ 37%	As in Common Customs Tariff of the EU (CCT)	Mature traditional demand exists	Attractive to U.S. suppliers. High potential for expansion as the economy recovers
<b>Beef</b>	120,660 MT	\$ 635.45	- 9.0 %	As in Common Customs Tariff of the EU (CCT)	Mature traditional demand exists for all kinds of beef meet although consumption dropped in favor of white meats	U.S. quality beef in demand with high potential to increase its share as economy improves and tourism recover
<b>Vegetable oils except Soya Oil</b>	214,273 MT	\$ 305.08	- 7.3 %	As in Common Customs Tariff of the EU (CCT)	Although stable market, demand is expected to increase due to biofuel production need	Attractive to U.S. suppliers can exploit potential

## SECTION V. POST CONTACT AND FURTHER INFORMATION

For additional information and available lists of private sector contacts, contact the Foreign Agricultural Service Office in Athens at the following address:

Foreign Agricultural Service  
American Embassy  
91, Q. Sofia Avenue  
GR-101 60 Athens  
Tel. ++30-210-720-2233  
Fax: ++30-210-721-5264  
Email: [AgAthens@usda.gov](mailto:AgAthens@usda.gov)

FAS home page: <http://www.fas.usda.gov>

U.S. Embassy Athens home page: <http://www.usembassy.gr>

### **GREEK GOVERNMENT AGENCIES**

Agency responsible for Greek labeling/product ingredient regulations:

#### **General State Chemical Laboratory**

Directorate of Foods

Ms. Dionysia Stefanitsi , Director

16, A. Tsoha Str, GR-115 21 Athens

Tel.: ++30-210-6479-251

Fax: ++30-210-6467-725

Email: [gxk-foodiv@ath.forthnet.gr](mailto:gxk-foodiv@ath.forthnet.gr)

Agency responsible for controlling food quality:

#### **Food Control Agency (EFET)**

Mr. Antonis Zabelas, President

124, Kifisias & 2, Iatridou GR 115265 Athens

Tel. ++30-210-6971-500

Fax: ++30-210-6971-501

Email: [azabelas@efet.gr](mailto:azabelas@efet.gr), [gramm1@efet.gr](mailto:gramm1@efet.gr)

### **Greek National Tourism Organization**

#### **Head office**

7, Tsoha street

GR-11521 Athens

Tel.: +30 210 8707000

Working hours: Weekdays 08.00-15.00

Website: [www.gnto.gr](http://www.gnto.gr)

#### **Contact the Central Services:**

#### **Information desk**

26, Amalias

Tel.: 210 3310392, 210 3310716, 210 3310347, Head: 210 3310529

Fax: 210 3310640

Working hours: Monday - Friday: 09.00 - 19.00,

Saturday, Sunday, holidays : 10.00 - 18.00

E-mail: [info@gnto.gr](mailto:info@gnto.gr)

E-mail: [info\\_central@gnto.gr](mailto:info_central@gnto.gr) (Head Office)

**Information Desk at "Eleftherios Venizelos" airport (arrivals hall)**

Tel. 210 3530445-8

Fax: 210 3532334

Working hours: Monday - Friday: 09.00 - 18.00

Saturday, Sunday, holidays : 10.00 - 15.00

E-mail: [venizelos@gnto.gr](mailto:venizelos@gnto.gr)

**Hellenic Chamber of Hotels**

24, Stadiou Street

Athens, GR 105 64

Tel: +30.2103310022

Fax: +30.2103225449

E-mail: [info@grhotels.gr](mailto:info@grhotels.gr)

**OTHER AGENCIES**

**Hellenic American Chamber of Tourism (HACT)**

**17280 Newphone street suite 18**

**Fountain Valley California 92708 USA**

**Tel : 646-485-1086**

**Fax : 714-641-0303**

**URL : [www.hact.us](http://www.hact.us)**

**E-mail : [chamberoftourism@aol.com](mailto:chamberoftourism@aol.com)**

**The competent authorities on Greek tariffs**

D 17th Customs Tariffs Division of the Ministry of Finance

40 Amalias Avenue

Athens, Greece

Tel: 01 324 5103

Fax: 01 324 5408

For tariff-related enquiries contact the following:

D 18th Division of Customs Economic Systems

Tel: 01 324 5529

Fax: 01 323 5593

D 19th Division of Customs Procedures

Tel: 01 324 3183

Fax: 01 324 2132

Division of Special Consumption Taxes

Tel: 01 324 5426

Fax: 01 324 5460

**Some of the major banks in Greece:**

- National Bank of Greece – [www.nbg.gr](http://www.nbg.gr)
- Alpha Bank – [www.alphabank.gr](http://www.alphabank.gr)
- Eurobank – [www.eurobank.gr](http://www.eurobank.gr)
- Agricultural Bank of Greece – [www.ate.gr](http://www.ate.gr)
- Citibank – [www.citibank.gr](http://www.citibank.gr)

U.S. EXPORTS OF AGRICULTURAL, FISH & FORESTRY PRODUCTS TO GREECE  
CY 2004 - 2008 AND YEAR-TO-DATE COMPARISONS  
(IN THOUSANDS OF DOLLARS)

EXPORT MARKET: GREECE

PRODUCT	CALENDAR YEARS (JAN-DEC)					JANUARY - MARCH COMPARISONS		% CHANGE
	2004	2005	2006	2007	2008	2008	2009	
<b>BULK AGRICULTURAL TOTAL</b>	21,372	33,960	24,148	49,588	37,697	13,781	6,922	+49.77
WHEAT	0	0	373	0	0	0	0	-
COARSE GRAINS	114	74	47	35	28	0	17	-
RICE	5	53	15	49	215	0	0	-
SOYBEANS	8,394	2,642	14	4,519	16,791	5,661	0	-100.0
COTTON	0	112	0	329	258	71	0	-100.0
TOBACCO	10,091	28,223	19,769	40,686*	14,828	1,172	6,116	92.79
PULSES	1,868	1,846	1,711	1,347	2,463	259	125	-51.56
PEANUTS	49	82	30	0	280	0	45	-
OTHER BULK COMMODITIES	850	928	2,194	2,623	2,825	618	619	0.03
<b>INTERMEDIATE AGRICULTURAL TOTAL</b>	19,778	14,327	19,422	14,551	11,885	1,983	2,076	4.70
WHEAT FLOUR	0	0	27	0	0	0	0	-
SOYBEAN MEAL	128	108	151	61	127	19	0	-100.0
SOYBEAN OIL	0	0	0	23	0	0	0	-
VEGETABLE OILS (EXCL SOYBEAN OIL)	141	525	617	306	322	32	37	16.58
FEEDS & FODDERS (EXCL PET FOODS)	350	149	259	176	513	122	119	-2.49
LIVE ANIMALS	112	61	0	4	25	0	46	-
HIDES & SKINS	2,770	5,670	6,482	8,362	7,891	538	699	29.88
ANIMAL FATS	13	608	71	0	0	0	0	-
PLANTING SEEDS	14,078	5,502	9,864	3,288	2,238	761	854	12.27
SUGARS, SWEETENERS, & BEVERAGE BASES	378	408	446	1,091*	627	228	61	-73.50
OTHER INTERMEDIATE PRODUCTS	1,806	1,297	1,504	1,240	1,143	283	261	-7.76
<b>CONSUMER-ORIENTED AGRICULTURAL TOTAL</b>	64,694	95,367*	73,565	83,325	72,323	17,166	11,464	-33.10
SNACK FOODS (EXCL NUTS)	1,588	1,960	3,128	3,381*	3,011	909	383	-57.87
BREAKFAST CEREALS & PANCAKE MIX	1,285	1,578*	1,062	554	554	124	71	-42.26
RED MEATS, FRESH/CHILLED/FROZEN	1,065	1,019	1,295	842	3,064	92	481	392.99
RED MEATS, PREPARED/PRESERVED	89	205	109	27	313*	0	0	-
POULTRY MEAT	12,768	12,094	7,051	10,591	8,228	1,410	2,002	44.15
DAIRY PRODUCTS	167	136	280	228	166	21	35	67.72
EGGS & PRODUCTS	8	3	10	17	0	0	0	-
FRESH FRUIT	2,695	1,462	155	170	0	0	11	-
FRESH VEGETABLES	174	91	10	0	23	0	4	-
PROCESSED FRUIT & VEGETABLES	2,417	2,335	2,335	3,405	3,179	586	455	-22.40
FRUIT & VEGETABLE JUICES	1,620	2,009	415	150	176	3	42	1284.0
TREE NUTS	35,634	68,535*	52,704	59,520	48,778	13,144	6,962	-47.12
WINE & BEER	181	121	114	322	70	7	83	1096.1
NURSERY PRODUCTS & CUT FLOWERS	4	3	0	90	0	0	3	-
PET FOODS (DOG & CAT FOOD)	1,876*	1,303	1,477	1,813	1,283	427	59	-76.87
OTHER CONSUMER-ORIENTED PRODUCTS	3,024	2,509	3,427	2,255	3,480*	424	955	101.43
<b>FOREST PRODUCTS (EXCL PULP &amp; PAPER)</b>	18,352	19,657	20,649	26,912	30,704*	6,373	2,965	-53.47

<http://www.fas.usda.gov/asp/quicklook.asp?lang=eng&cid=472032208&12/31/09>

LOGS AND CHIPS.....	524	579	337	5,810	7,159*	1,477	842	-49.77
HARDWOOD LUMBER.....	10,204	13,030	13,896	12,019	14,996*	2,282	1,245	-45.11
SOFTWOOD AND TREATED LUMBER.....	1,266	1,008	1,212	1,210	722	100	79	-20.89
PANEL PRODUCTS (INCL. PLYWOOD).....	5,221	4,465	4,460	6,770	6,423	1,093	784	-28.32
OTHER VALUE-ADDED WOOD PRODUCTS.....	1,116	574	744	1,100	1,404	221	114	-48.40
FISH & SEAFOOD PRODUCTS, EDIBLE.....	2,668	4,668	4,535	8,581*	7,376	1,728	2,951	70.79
SALMON, WHOLE OR Eviscerated.....	351	279	414	922*	455	0	0	-
SALMON, CANNED.....	0	30	37	0	62	62	0	-100.0
CRAB & CRABMEAT.....	11	42	10	14	0	0	0	-
SURIMI (FISH PASTE).....	0	0	38	0	0	0	0	-
ROE & URCHIN (FISH EGGS).....	209	127	389	492*	162	0	0	-
OTHER EDIBLE FISH & SEAFOOD.....	2,317	4,190	3,648	7,142	6,696	1,666	2,951	77.18
AGRICULTURAL PRODUCT TOTAL.....	105,843	143,654	137,136	147,465	122,906	32,929	20,482	-37.80
AGRICULTURAL, FISH & FORESTRY TOTAL.....	127,083	167,978	142,320	182,958	160,955	41,030	26,298	-35.66

ANALYSIS BY: COMMODITY AND MARKETING PROGRAMS/FAS/USDA  
SOURCE: U.S. BUREAU OF THE CENSUS TRADE DATA  
NOTE: \* DENOTES HIGHEST EXPORT LEVELS SINCE AT LEAST CY 1970

FOR MORE INFORMATION VISIT THE FAS WEB SITE "FASOnline"  
AT [www.fas.usda.gov](http://www.fas.usda.gov), SELECT SEARCH, THEN BICO REPORTS  
OR EMAIL FAS AT [usthelp@fas.usda.gov](mailto:usthelp@fas.usda.gov)

**U.S. IMPORTS OF AGRICULTURAL, FISH & FORESTRY PRODUCTS FROM GREECE**  
CY 2004 - 2008 AND YEAR-TO-DATE COMPARISONS  
(IN THOUSANDS OF DOLLARS)

IMPORT MARKET: GREECE

PRODUCT	CALENDAR YEARS (JAN-DEC)					JANUARY - MARCH		
	2004	2005	2006	2007	2008	2008	2009	% CHANGE
<b>BULK AGRICULTURAL TOTAL.....</b>	<b>33,288</b>	<b>53,700</b>	<b>31,401</b>	<b>32,447</b>	<b>30,741</b>	<b>6,070</b>	<b>5,281</b>	<b>52.89</b>
RICE.....	8	18*	3	6	10	10	3	-66.29
TOBACCO.....	32,400	52,512	30,378	31,443	29,669	5,943	5,139	53.78
RUBBER & ALLIED PRODUCTS.....	497	444	775*	746	753	69	71	3.36
COFFEE, UNROASTED.....	9	8	0	15	10	0	0	-
TEA (INCL. HERB TEA).....	11	169	53	56	79	3	37	874.14
OTHER BULK COMMODITIES.....	164	149	191	181	220	46	40	-12.87
<b>INTERMEDIATE AGRICULTURAL TOTAL.....</b>	<b>13,402</b>	<b>17,018</b>	<b>23,083</b>	<b>26,362*</b>	<b>23,247</b>	<b>4,971</b>	<b>5,706</b>	<b>14.80</b>
OTHER VEGETABLE OILS.....	12,455	15,464	21,364	25,015*	19,693	3,740	5,430	45.18
FEEDS & FEEDS (EXCL. DRY FOODS).....	7	0	0	0	0	0	0	-
HIDES & SKINS.....	44	10	0	1	93	0	4	-
PLANTING SEEDS.....	0	88	5	0	0	0	94	-
SUGARS, SWEETENERS, & BEVERAGE BASES..	3	9	4	15	0	0	3	-
ESSENTIAL OILS.....	626	1,170	1,493	655	2,212*	1,116	0	-100.0
COCOA PASTE & COCOA BUTTER.....	0	5	0	3	0	0	3	-
OTHER INTERMEDIATE PRODUCTS.....	266	273	195	473	269	115	171	48.41
<b>CONSUMER-ORIENTED AGRICULTURAL TOTAL.....</b>	<b>122,140</b>	<b>139,586</b>	<b>139,392</b>	<b>226,655*</b>	<b>180,472</b>	<b>40,715</b>	<b>35,973</b>	<b>-11.65</b>
SNACK FOODS (INCL. CHOCOLATE).....	4,530	5,299	6,750	24,324*	16,625	3,625	3,040	-16.11
CHEESE.....	14,385	15,752	14,776	19,771*	18,588	2,159	4,452	106.18
OTHER DAIRY PRODUCTS.....	5,481	9,205	15,824	31,948*	17,033	12,367	229	-98.15
OTHER FRESH FRUIT.....	563	1,166	642	954	353	322	293	-12.13
FRESH VEGETABLES.....	8	28	0	15	19	0	0	-
PROCESSED FRUIT & VEGETABLES.....	84,934	93,844	88,146	132,634*	110,903	20,567	25,334	23.18
FRUIT & VEGETABLE JUICES.....	0	2	20	37	9	0	15	-
TREE NUTS.....	79	36	49	153	608	422	40	-90.60
WINE AND BEER.....	8,124	9,402	8,776	10,878*	10,599	793	1,679	111.84
NURSERY PRODUCTS & CUT FLOWERS.....	0	0	10	0	0	0	0	-
ROASTED & INSTANT COFFEE.....	1,134	1,433	1,374	2,001	2,019*	238	167	-29.96
SPICES.....	799	874	560	631	504	28	130	360.23
OTHER CONSUMER-ORIENTED PRODUCTS.....	2,142	2,543	2,456	3,320*	3,212	184	595	222.69
<b>FOREST PRODUCTS (EXCL. PULP &amp; PAPER).....</b>	<b>3,522</b>	<b>2,864</b>	<b>2,144</b>	<b>1,868</b>	<b>1,180</b>	<b>280</b>	<b>6</b>	<b>-97.84</b>
LOGS AND CHIPS.....	795*	42	0	0	0	0	0	-
HARDWOOD LUMBER.....	466	923	639	378	43	24	0	-100.0
SOFTWOOD AND TREATED LUMBER.....	1,134*	990	676	421	0	0	0	-
PANEL PRODUCTS (INCL. PLYWOOD).....	890	795	710	899	915	168	0	-100.0
OTHER VALUE-ADDED WOOD PRODUCTS.....	337	113	118	170	222	78	6	-92.27
<b>FISH &amp; SEAFOOD PRODUCTS, EDIBLE.....</b>	<b>6,406</b>	<b>6,074</b>	<b>7,663</b>	<b>9,898</b>	<b>12,839*</b>	<b>1,921</b>	<b>3,248</b>	<b>11.20</b>
SHRIMP.....	0	0	0	0	0	0	8	-
TUNA.....	12	18	29	17	0	0	103	-
LOBSTER.....	2	0	12	5	0	0	0	-
SALMON, WHOLE OR Eviscerated.....	7*	0	0	0	0	0	0	-
OTHER EDIBLE FISH & SEAFOOD.....	6,585	6,055	7,641	9,876	12,839*	2,921	3,137	7.40
<b>AGRICULTURAL PRODUCT TOTAL.....</b>	<b>169,231</b>	<b>210,304</b>	<b>193,875</b>	<b>285,464*</b>	<b>233,481</b>	<b>51,756</b>	<b>50,960</b>	<b>-1.94</b>
<b>AGRICULTURAL, FISH &amp; FORESTRY TOTAL.....</b>	<b>179,359</b>	<b>219,242</b>	<b>203,701</b>	<b>297,229*</b>	<b>247,500</b>	<b>54,957</b>	<b>54,214</b>	<b>-1.35</b>

ANALYSIS BY: COMMODITY AND MARKETING PROGRAMS/FAS/USDA  
SOURCE: U.S. BUREAU OF THE CENSUS TRADE DATA  
NOTE: \* DENOTES HIGHEST IMPORT LEVELS SINCE AT LEAST CY 1970

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OR EMAIL FAS AT [usthelp@fas.usda.gov](mailto:usthelp@fas.usda.gov)