

PRODUCT REPORT

RICE

SPAIN

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1. Introduction

The rice is a cereal of paramount importance for human consumption, to which 95% of the production is dedicated, being basic in the diet of more than half of the world population, especially in countries underdeveloped or developing

Its origin is located in Asia, probably in India, more than 10,000 years ago, although it was in China where its cultivation and domestication began. From Asia it passed to Eastern Europe about the year 800 BC, arriving in Spain with the Muslim invasion and spreading from here to Mediterranean Europe and later to the American continent.

Spain is known as the cradle of rice in Europe because, although it was Alexander the Great who introduced it in the first instance, those who promoted its cultivation were the Arabs during the period in which they dominated the Iberian Peninsula (8th century), from where it spread later to France and Italy. Rice is characterized by being highly concentrated in five autonomous communities: Extremadura, Catalonia, the Valencian community, Navarra and Andalusia. Its cultivation is an important activity in certain wetlands that are also of tourist interest, such as the Albufera de Valencia, the Delta del Ebro or the marshes of the Guadalquivir in the vicinity of the Doñana Park. There are even Denomination of Origin brands that protect the quality and characteristics of production in some regions, such as Arroz de Valencia (which is grown in the vicinity of the Albufera Natural Park in Valencia), the Ebro Delta Rice in Tarragona, and the Calasparra Rice, which is produced in Murcia and Albacete

Healthy, versatile and capable of having a thousand different tastes. Rice, one of the most consumed foods in the world, is an essential ingredient in Spanish cuisine. Currently, Spain produces much more rice than it consumes and is the second European producer. Italy is the first producer, with 51% of the total production, followed by Spain with 29% of it and with 25% of the surface. Followed by Greece, Portugal, France, Romania, Bulgaria and Hungary.



2. Product Description

Rice is one of the most important staples for human consumption, there are over 40 thousand varieties of cultivated rice. The possibilities of differentiation in rice are endless, although marketing can be challenging.

Rice varieties grown in Spain can be classified under the following groups according to the size/shape of the rice kernel¹:

Main Rice Varieties Grown in Spain

Group	Size of the kernel	Length/width ratio	Representative Varieties	Region	Share of area (%)
Round Grain Japonica	(<5,2 mm).	<2	Bomba Balilla x Sollana	Valencia, Cataluña Murcia	2%
Medium Grain Japonica	(5,2 - 6 mm)	<3	Gleva JSendra Fonsa	Valencia, Cataluña and Andalucía	55%
Long Grain Japonica (Long grain A)	(>6 mm)	>2 and <3	Guadamar Marisma	Aragón, Navarra Andalucía, Extremadura	6%
Long Grain Indica (Long grain B)	(>6 mm)	≥3	Puntal	Andalucía Extremadura	37%

Source: FAS Madrid based on OEVV and industry sources

Indica and Japonica rice are the most common rice varieties in Spain. Glutinous and aromatic refer to the characteristics of rice. Aromatic rice is classed as a speciality for its fragrance and aroma. Basmati and jasmine rice are the most common aromatic rice varieties. Glutinous rice includes all rice varieties that become glue-like or sticky when cooked. There are several Indica and Japonica cultivars that are categorized as glutinous rice.

¹ USDA'S Global Agriculture Information Network (GAIN).Declining Rice Area and New Eating Habits Create Opportunities in Spain's Rice Market



According to the Spanish Ministry of Agriculture, area devoted to Indica rice in **2015/16** in Spain represented just over 45% of total production, while Japonica rice production is nearly 55%. Data for **2016/17** indicate Indica rice share has gone down to just 40%, while Japonica has registered an equivalent increase, representing 60% of rice plantings.

On top of the downward trend in rice plantings, Spanish producers are switching from Indica varieties to Japonica varieties, as Indica growers face stiff competition from imports. Consequently, the surplus of long-grain, Indica, rice in the market caused by increasing imports is being transferred to the round-grain, Japonica, rice market in the shape of increased Japonica rice plantings, which results in higher competition and pressures domestic prices down².

There is no separate code for different rice varieties. Only the variation in processing has different codes: paddy, husked, milled and broken rice. For the purposes of this report, the cutlery sector shall be composed of the following sub-sectors and their tariff codes³.

- **HS Code 1006:** Rice
- **HS Code 100610:** Rice in the husk
- **HS Code 100620:** Husked or Brown rice
- **HS Code 100630:** Semi or wholly milled rice, whether or not polished or glazed
- **HS Code 100640:** Broken rice

² USDA'S Global Agriculture Information Network (GAIN).Declining Rice Area and New Eating Habits Create Opportunities in Spain's Rice Market

³

<http://trade.ec.europa.eu/tradehelp/myexport#?product=1006100000&partner=PK&reporter=ES>



3. World Rice Market

Rice is the staple food of more than half of the world's population, with more than 700 million tons produced annually at a global level (equivalent to 470 million tons of milled rice). Although most rice is consumed in the countries where it is produced, a growing demand in some areas is feeding the international rice trade.

Most of the rice is grown and consumed in Asia, from Pakistan in the west to Japan in the east. 'Rice-producing Asia' – defined as Asia excluding Mongolia and the countries of Central Asia – accounts for roughly 90% of world rice production. But because it is a net exporter of rice to the rest of the world, its current share in global rice consumption is slightly less (87%). Outside Asia, where rice is not a staple yet, per capita consumption continues to grow. In Africa, consumption has grown faster than production, so many countries must import their rice.⁴

Rice is the second most important cereal crop after maize in the world. Rice is a strategic commodity for many rice producing countries. Most countries try to reach self-sufficiency in rice due to its strategic importance in domestic food security. Changes in rice availability and prices have caused social unrest in several countries. With further area expansion unlikely, global rice yields must rise faster than in the recent past if world market prices are to be stabilized at affordable levels for the billions of consumers. Before the 2008 food crisis, the prevalent real milled rice price was US\$ 300 per ton in international markets.

Despite a continuous growth, the international trade in Rice corresponds approx. to only 8% of the total rice production. In 2017 the international rice trade value was above US\$ 42.2 billion. Rice exports by country totalled US\$ 20.7 billion in 2017, down by an average -19.3% for all exporting countries from 2013 when overall rice shipments were valued at US\$ 25.7 billion. Year over year, the value of global rice exports dipped by a modest -0.3% from the US\$ 20.8 billion worth of exported rice in 2016. From a continental perspective, three-quarters (75%) of global rice exports originated from Asian

⁴ <http://ricepedia.org/rice-as-commodity/international-rice-market-trade>



countries with shipments amounting to \$15.6 billion. North American exporters supplied 8.8% of global rice exports, followed by Europe at 8.6% then Latin America (excluding Mexico) plus the Caribbean at 6.1%. Smaller percentages came from Oceania (mostly Australia) at 0.8% and Africa at 0.5%⁵.

Global purchases of imported rice totalled US\$ 21.5 billion in 2017. The overall value of rice imports for all buyer countries was down by an average -9.4% since 2013 when rice purchases were valued at US\$ 23.7 billion. Global rice imports appreciated by 6% from 2016 to 2017. Among continents, Asian countries consumed the highest dollar worth of imported rice during 2017 with purchases valued at US\$ 9.8 billion or 45.5% of the global total. In second place were African importers at 26% while 14.1% of worldwide rice imports were delivered to European nations. Smaller percentages were bought by importers in North America (6.6%), Latin America excluding Mexico but including the Caribbean (6.3%) and Oceanian countries (1.2%) led by Australia and New Zealand⁶.

The top exporters of Rice are India (US\$ 5.5 billion), Thailand (US\$ 5.2 billion), United States (US\$ 1.8 billion), Pakistan (US\$ 1.7 billion) and Vietnam (US\$ 1.6 billion). The top importers are China (US\$ 1.8 billion), Benin (US\$ 1.1 billion), Saudi Arabia (US\$ 1.0 billion), Iran (US\$ 853.9 million) and Bangladesh (US\$ 734.3 million).

India is the largest exporter of rice in the world. It exported more than 9.9 million metric ton of rice in 2017, which accounted 26.3% of the total global rice exports. India is also the leading exporter of the basmati rice in the global market. Thailand, which had 24.9% of the shares out of the total rice exports, USA capturing 8.5% of rice market, Pakistan ranking the 4th major exporter with 8.4% share in world market, and Vietnam with 7.5% of the market share in 2017 were other major exporters.

⁵ <http://www.worldstopexports.com/rice-exports-country/>

⁶ <http://www.worldstopexports.com/rice-exports-country/>



China has been the major importer of rice for the last years and accounted for 8.5% of total imports in 2017. Although China is the second largest rice producing country in the world, it still has to import rice due to high consumption of rice in the nation. Benin was second with approximately 5% of world imports of rice closely followed by Saudi Arabia with 4.8% of the import shares and Iran and Bangladesh with 4% and 3.4% respectively.

The following table shows the main countries **Exporters** of Rice in the world.

Rank	Destination	Rice Exports 2017 (US\$)	Change %
1.	India	5.5 billion	26.3%
2.	Thailand	5.2 billion	24.9%
3.	USA	1.8 billion	8.5%
4.	Pakistan	1.7 billion	8.4%
5.	Vietnam	1.6 billion	7.5%
6.	Italy	597.5 million	2.9%
7.	China	596.8 million	2.9%
8.	Uruguay	474.3 million	2.3%
9.	Cambodia	333.1 million	1.6%
10.	Myanmar	320.6 million	1.5%
11.	Brazil	244.6 million	1.2%
12.	Belgium	243.1 million	1.2%
13.	Netherlands	214.1 million	1%
14.	Paraguay	194.2 million	0.9%
15.	Argentina	179.6 million	0.9%

Source: World's Top Exporters

The listed 15 countries shipped 92% of all rice exports in 2017 (by value). Among the above countries, the fastest-growing rice exporters since 2013 were: China (up 43.2%), Cambodia (up 32.5%), Netherlands (up 21.8%) and Paraguay (up 17.4%). Those countries that posted declines in their exported rice sales were led by: Vietnam



(down -47.0%), Brazil (down -38.9%), Argentina (down -38.3%), India (down -33.2%) and Myanmar (down -25.3%)⁷.

And finally, the following chart shows the main countries **Importers** of rice in the world.

Rank	Destination	Rice Imports 2017 (US\$)	Change %
1.	China	1.8 billion	8.5%
2.	Benin	1.1 billion	5%
3.	Saudi Arabia	1 billion	4.8%
4.	Iran	853.9 million	4%
5.	Bangladesh	734.3 million	3.4%
6	United States	727.7 million	3.4%
7	United Arab Emirates	593.5 million	2.8%
8	United Kingdom	546.6 million	2.5%
9.	South Africa	513.3 million	2.4%
10	Iraq	512.2 million	2.4%
11.	France	474 million	2.2%
12	Ivory Coast	423.5 million	2%
13	Mexico	408.1 million	1.9%
14	Senegal	382.6 million	1.8%
15.	Japan	358.1 million	1.7%

Source: World's Top Exporters

The top 15 countries purchased 48.7% of all rice imported during 2017. Imported rice remain in demand from 219 importing geographies located around the globe. Among the top rice buyers, only three increased their imported rice purchases since 2013: Bangladesh (up 1,639%), Benin (up 81.3%) and China (up 73.8%). Those countries that

⁷ <http://www.worldstopexports.com/rice-exports-country/>



posted the most severe declines in their imported rice purchases were: Iran (down -63%), Japan (down -27.3%), Saudi Arabia (down -26.4%) and South Africa (down -23.1%).

4. European Market

The rice-producing countries in southern Europe consume much more rice per capita than northern European countries. Mediterranean countries consume 6 to 18 kilograms annually, while the consumption in the rest of Europe ranges from 3.5 to 5.5 kg. According to EU Agricultural Outlook, the average consumption in Europe increased from 4.7 kg per capita in 2005 to 5.5 kg per capita in 2016⁸. It is assumed that the consumption will further increase because of the diversification of traditional diets.

EU rice production is dominated by Japonica rice, which represents approx. 65-70% of total EU rice production. After milling, the total estimated production amounts to 1.8 million tonnes. Since 2014, the Japonica varieties has shown a clear increase in European production, while the volume of Indica varieties has decreased. Historically, Japonica rice has been the traditional rice in Europe and part of the Mediterranean diet notably in Italy and Spain. Traditional foods such as paella or risotto are made with Japonica varieties, whose characteristics (e.g. ability to absorb the flavour of the spices or the sauce itself) make it much more suitable for the preparation of these foods than Indica rice.

The relative scarcity of Japonica rice at global level (approx. 13% only of global rice production is Japonica), the small volumes traded internationally and its higher price on the world market also support predominance of EU japonica rice on the EU market, with limited competition from imports.

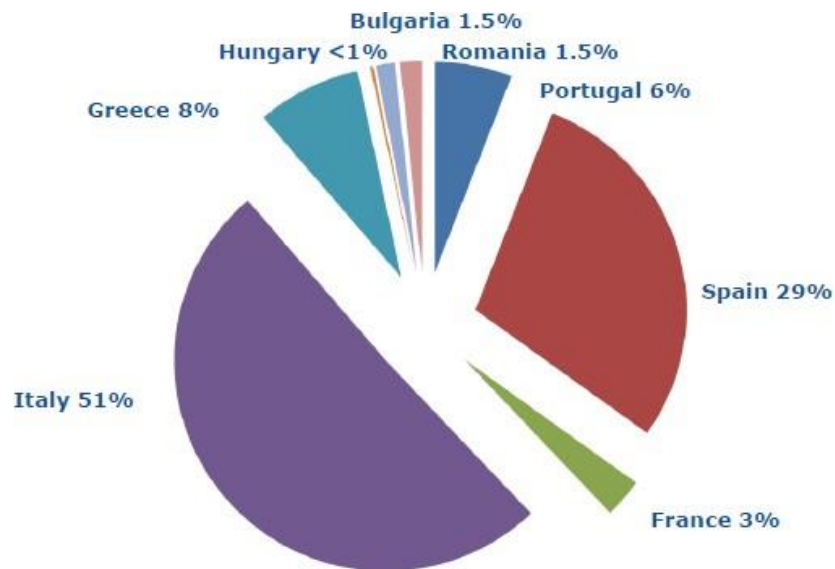
EU rice production is located in 8 Member States. Italy and Spain together are responsible for 80% of the total rice production (50% for Italy, 30% for Spain), Greece

⁸ <https://www.cbi.eu/market-information/grains-pulses/specialty-rice-varieties/>



(8%), Portugal (6%) and France (3%) are the other largest rice producers. Minor production volumes are visible in Romania, Hungary and Bulgaria.

Share from the EU rice production



Source: European Commission

European interest in speciality varieties of rice is growing. Consumers are drawn to Asian aromatic varieties of rice, as well as to varieties that are suitable for traditional dishes such as sushi, risotto or paella. Brown rice has also increased in popularity thanks to its health benefits. In future, growing opportunities can be expected for niche rice varieties such as red and black rice.

In Europe, this increasing demand has resulted in a higher availability of aromatic rice varieties as well as a small, high-value segment of coloured rice. The European demand for long-grain Indica rice and exotic varieties such as basmati or jasmine rice (and organic rice) is growing by 6% annually

The role of the external trade, in particular imports, is very significant in the EU, as around one third of EU rice needs must be imported. The EU imports every year approx. 1 million tonnes of rice, the structure of rice imports has changed over the last



years with an increase of imports of milled rice (approx. 600 000 tonnes 60% of all rice imports) and a decrease of imports of husked rice (non-Basmati)⁹.

EU rice imports consist mainly of Indica rice. For Japonica, the EU is self-sufficient, and a small exportable surplus is produced (approx. 200 000 tonnes milled). Around 90% of EU rice exports are made of Japonica rice. Italy is responsible for around 70% of the total exports and Spain provides an additional 15 %.

Volumes and origin are influenced by the tariff preferences granted by the EU to various EU rice producing countries. For instance:

- around 300 000 tonnes or 30% of total EU rice imports come as duty-free imports from countries benefiting from the so-called EBA agreement like Cambodia and Myanmar
- around 300 000 tonnes or 30% of total EU rice imports come as duty-free imports of husked Basmati rice from India and Pakistan

European imports of milled rice increased by almost 70% in the past five years. The import duties for milled rice are usually higher than for husked rice, but several countries have been granted duty-free quota or completely duty-free access to the market.

Imports of husked Basmati rice have been increasing thanks to the commercial agreement with India and Pakistan which allow duty-free imports of husked Basmati rice (Additional information on EU's Rice Import Preferential Regimes can be found in Annex I). Basmati imports represent 30% of total EU rice import. In general, two-thirds of Basmati imports are covered by India and one-third by Pakistan. An estimated 62% of imported husked rice was basmati rice in the first quarter of 2017¹⁰.

⁹ https://ec.europa.eu/agriculture/sites/agriculture/files/cereals/trade/rice/economic-fact-sheet_en.pdf

¹⁰ https://ec.europa.eu/agriculture/sites/agriculture/files/cereals/trade/rice/economic-fact-sheet_en.pdf



The origin of EU rice imports has also significantly changed over the last years. While India and Thailand remain key suppliers, duty free imports originating from countries benefiting from the Every But Arms (EBA) agreement, mainly Cambodia and Myanmar, have been increasing, while imports originating from ACP countries such as Guyana and Surinam have been decreasing.

The following table shows EU top imports destinations for Rice:

Rank	Destination	EU Imports 2017 (US\$ million)	Change %
1.	India	439.28	18.1%
2.	Thailand	185.59	7.7%
3.	Cambodia	154.13	6.4%
4.	Pakistan	140.17	5.8%
5.	Myanmar	113.81	4.7%
6.	Guyana	53.48	2.2%
7.	USA	37.06	1.5%
8.	Uruguay	32.30	1.3%
9.	Vietnam	10.14	0.4%
10.	Russia	8.97	0.37%
11.	Kazajstán	7.51	0.31%
12.	Surinam	5.11	0.2%

Source: EuroStats. Market Access Database



5. Spanish Market

Area planted to rice in Spain has been declining since 2011 except for in the traditional growing areas as there are no viable alternatives. Pesticides restrictions, import competition, and a highly competitive domestic market dominated by supermarket brands are the driving factors behind this decline. Despite the overall decline in rice consumption, there are opportunities for both domestic producers and exporters to supply new market niches¹¹.

The main rice producing regions in Spain are Andalucía, Extremadura, Comunidad Valencia, Cataluña, Aragón, and Navarra. According to the latest official estimates Spain's rough rice production in 2017 reached 828,000 MT. The sharper decline in production compared to the area reduction is partially explained by the switch towards lower-yielding Japonica varieties.

Agricultural Cooperatives manage nearly 60 percent of the field rice production. However, at the processing level Cooperatives' market share is far smaller, representing just over 15 percent of the husking, whitening and packaging process.

Spain's per capita rice consumption amounts to about 6 Kg per year, somewhat above the EU's average per capita consumption. However, according to MAPAMA's consumption panel, Spain's rice household consumption has continued to decrease over the last 5 years¹². Japonica varieties are preferred by the Spanish consumers as its cooking characteristics, make them more suitable for traditional food preparation. Nevertheless, Indica consumption, along with other non-traditional rice varieties and ready-to-eat rice portions continue to grow due to its adaptation to new eating habits, and the adoption of non-traditional dishes. Therefore, Spain could greatly benefit from importing Rice at competitive prices from Pakistan.

¹¹ https://ec.europa.eu/agriculture/sites/agriculture/files/cereals/trade/rice/economic-fact-sheet_en.pdf

¹² <http://www.mapama.gob.es/es/agricultura/temas/producciones-agricolas/cultivos-herbaceos/arroz/default.aspx>



6. Trade

6.1 Trade balance of the sector

In 2017 the exports of Spain reached 175.43 million dollars and imports 94.04 million dollars, resulting in a positive balance of +81.39 million dollars for Spain.

The evolution of the trade balance of Spain for the rice sector in recent years is shown in the following table.

Evolution of Trade Balance in Spain for Rice Sector

Evolution Trade Balance of Sector (million US\$)	Export Spain	% Change	Import Spain	% Change	Bilateral Trade	Balance Spain
2011	191.45	+1.1%	97.67	+47.1%	289.12	+93.78
2012	219.33	14.6%	91.28	-6.5%	310.61	+128.05
2013	197.11	-10.1%	84.34	-7.6%	281.45	+112.77
2014	185.38	-5.9%	86.76	2.9%	272.14	+98.62
2015	170.83	-7.8%	81.39	-6.2%	252.22	+89.44
2016	180.19	5.5%	93.04	14.4%	273.23	+87.15
2017	175.43	-2.6%	94.04	1.1%	269.47	+81.39

Source: Datacomex, Spanish Secretariat for Trade

As for the specific distribution by autonomous communities in the export of Rice it is observed that Andalucía¹³ occupies the first place with a share of 54.1% on the national total, followed by Comunitat Valenciana with 34.1% and Cataluña, with a share of 6.3% of total exports in Spain.

¹³<http://datacomex.comercio.es/CabeceraPersonalizada.aspx?action=drilldown&eje=Filas&valor=Total%20Nacional&unvalor=%5BProvincial%5D.%5BTtotal%20Nacional%5D&nivel=0&otroValor=total&otroNivel=0&id=1>



Trade balance of Sector 2017 (million US\$)	Export (million US\$)	Share (%)	Import (million US\$)	Share (%)
Andalucía	94.98	54.1%	18.61	19.8%
Comunitat Valenciana	59.71	34.1%	30.36	32.3%
Cataluña	10.98	6.3%	18.27	19.4%
Extremadura	2.26	1.3%	0.17	0.18%
País Vasco	2.05	1.2%	0.04	0.04%
Navarra, Comunidad Foral	1.79	1.0%	1.10	1.2%
No determinado	1.41	0.8%	0.01	0.01%
Madrid, Comunidad	1.24	0.7%	7.22	7.7%
Murcia, Región de	0.56	0.3%	0.10	0.1%
Castilla-La Mancha	0.13	0.07%	0.08	0.08%
Castilla y León	0.09	0.05%	0.09	0.09%
Melilla	0.08	0.04%	12.08	12.8%
Galicia	0.05	0.03%	0.01	0.0%
Aragón	0.04	0.02%	0.69	0.7%
Canarias	0.03	0.01%	2.81	3.0%
Balears, Illes	0.01	0.006%	0.14	0.1%
Rioja, La	0.0	0.0%	0.0	0.0%
Asturias, Principado de	0.0	0.0%	0.07	0.07%
Cantabria	0.0	0.0%	0.12	0.1%
Ceuta	0.0	0.0%	2.07	2.2%
Spain	175.43	100%	94.04	100%

Source: Datacomex, Spanish Secretariat for Trade

In the table below we can observe the figures for foreign trade of the rice sector in Spain in 2017 divided by the tariff codes that we are analysing in this report. Most of the exports and imports are headed by tariff code 100630, Semi or wholly milled rice, whether or not polished or glazed, (US\$ 99.45 million; 56.7% share of national exports), followed by tariff code 100620, Husked or Brown rice (US\$ 58.96 million; 33.6% share of Spanish total exports), and finally very distantly by tariff code 100610, Rice in the husk and 100640, Broken rice with a share of 5.5% and 4.2% respectively.



HS Code	Export 2017 (million US\$)	Share (%)	Import 20117 (million US\$)	Share (%)
100610: Rice in the husk	9.59	5.5%	9.31	9.9%
100620: Husked or Brown rice	58.96	33.6%	24.36	25.9%
100630: Semi or wholly milled rice, whether or not polished or glazed	99.45	56.7%	50.26	53.4%
100640: Broken rice	7.43	4.2%	10.11	10.8%
TOTAL	175.43	100%	94.04	100%

Source: Datacomex, Spanish Secretariat for Trade

6.2 Export Analysis

Spain is a net exporter of rice with exports largely exceeding imports. Indica rice production, grown in the regions of Andalucía and Extremadura, is export oriented. Japonica round or medium grain varieties, mostly grown in Valencia, Catalonia, Navarra and Aragon are intended for the domestic market.

The vast majority of Spanish rice is exported to other EU Member States. Lower domestic availability and stiff competition by third countries in the EU markets are making intra-EU exports increasingly challenging. Spain's Indica rice production competes with third countries exports (EBA countries such as Cambodia and Myanmar) to other European Member States who largely dependent on imports. This stiff competition is driving the switch in cultivation towards better-priced Japonica varieties intended for the domestic market.

Spain's exports of Rice amounted to US\$ 175.43 million in 2017, depicting a decrease of -2.6% when compared to Spain's exports in 2016 (US\$ 180.19 million).



Major export destinations in 2017 were Belgium (US\$ 48.60 million; 27.70% share), UK (US\$ 28.63 million; 16.32% share), France (US\$ 15.68 million; 8.93% share), Portugal (US\$ 11.99 million; 6.83% share), Netherlands (US\$ 11.73 million; 6.68% share) and USA (US\$ 7.33 million; 4.18% share). Spain's exports to Pakistan amounted to US\$ 0.0 million in 2017, representing a decrease of -100% as compared with last year's same period US\$ 0.11 million, share 0.06%. This figure is similar to competitor's countries Vietnam and Bangladesh.

As the table below depicts, Spain's major customers are still in Europe, however, a process of expansion towards third countries is starting.

Main customers of Spain in Rice Sector

Rank	Destination	Exports 2016 (US\$ Million)	Exports 2017 (US\$ Million)	Change
1.	Belgium	45.39	48.60	+7.1%
2.	UK	37.89	28.63	-24.4%
3.	France	16.22	15.68	-3.3%
4.	Portugal	13.13	11.99	-8.7%
5.	Netherlands	14.02	11.73	-16.3%
6.	USA	6.61	7.33	10.9%
7.	Germany	6.31	6.23	-1.3%
8.	Syria	3.60	5.97	+65.8%
9.	Finland	5.19	5.72	+10.2%
10.	Bulgari	3.69	5.20	+40.9%
27.	India	0.18	0.41	127.7%
74.	China	0.0	0.004	100%
---	Pakistan	0.11	0.0	-100%
---	Vietnam	0.0	0.0	0.0%
----	Bangladesh	0.0	0.0	0.0%
-	Total	180.19	175.43	-2.6%

Source: Datacomex, Spanish Secretariat for Trade



Exports of Rice between Spain and Pakistan (2013-2017)

Spain's Exports of Rice to Pakistan (US\$ Million)				
2013	2014	2015	2016	2017
0.0	0.0	0.0	0.11	0.0

Source: Datacomex, Spanish Secretariat for Trade

Major Region exporting to Pakistan (2013-2017)

Trade US\$ Million	2013	2014	2015	2016	2017
Andalucía	0.0	0.0	0.0	0.11	0.00

Source: Datacomex, Spanish Secretariat for Trade

6.3 Import analysis

Imports originate in third countries such as Thailand, Pakistan, Myanmar or Cambodia. Data available for January through December 2017 indicate that imports exceed 70% of imports in 2015. EBA countries such as Cambodia and Myanmar are seen as a major threat by Spanish rice producers.

Spain's imports of Rice amounted to US\$ 94.04 million in 2017, depicting an increase of +1.07% when compared to Spain's imports in 2016 (US\$ 93.04 million). Major import sources in 2017 were Thailand (US\$ 21.23 million; 22.57% share), Pakistan (US\$ 16.11 million; 17.13% share), Italy (US\$ 13.60 million; 14.47% share), Myanmar (US\$ 6.36 million; 6.76% share), Portugal (US\$ 6.36 million; 6.76% share) and France (US\$ 5.65 million; 6.01% share). Spain's imports from Pakistan amounted to US\$ 16.11 million in 2017 representing a share of 17.13% in Spain's global imports of Rice for the mentioned period. This figure is much higher than its competitor's countries India (US\$ 5.20 million), Vietnam (US\$ 0.29 million) or China (US\$ 0.0001 million). Pakistan have managed to be ranked among Spain's top five suppliers of Rice products.



Main Rice suppliers of Spain

The following table shows the main countries from which Spain import Rice.

Rank	Destination	Imports 2016 (US\$ Million)	Imports 2017 (US\$ Million)	Variation
1.	Thailand	20.92	21.23	+1.5%
2.	Pakistan	11.07	16.11	+45.5%
3.	Italy	9.69	13.60	+40.4%
4.	Myanmar	5.61	6.36	+13.4%
5.	Portugal	7.89	6.36	-19.4%
6.	France	5.24	5.65	+7.8%
7.	India	3.92	5.20	+32.6%
8.	Cambodia	4.28	3.86	-9.8%
9.	Uruguay	2.46	2.46	0.0%
10.	UK	1.99	2.45	+23.11%
18.	Vietnam	0.22	0.29	+31.8%
34.	China	0.02	0.0001	-99.5%
43.	Bangladesh	0.0	0.000002	+0.02%
-	Total	93.04	94.04	+1.07%

Source: Datacomex, Spanish Secretariat for Trade

Imports of Rice between Spain and Pakistan (2013-2017)

Spain's Imports of Rice from Pakistan (US\$ Million)				
2013	2014	2015	2016	2017
11.79	16.74	21.13	11.07	16.11

Source: Datacomex, Spanish Secretariat for Trade



Major Regions importing from Pakistan (2013-2017)

Trade US\$ Million	2013	2014	2015	2016	2017
Andalucía	9.41	11.38	16.47	7.93	8.66
Comunitat Valenciana	0.40	2.98	2.70	1.70	6.41
Cataluña	1.46	2.21	1.77	1.29	0.98
Canarias	0.07	0.12	0.04	0.03	0.03
Madrid, Comunidad de	0.20	0.03	0.0	0.0	0.0
Melilla	0.0	0.0	0.03	0.08	0.01
Galicia	0.0	0.0	0.10	0.0	0.0
Aragon	0.0	0.03	0.02	0.04	0.0
Others	0.25	0.0	0.0	0.0	0.01
Total	11.79	16.74	21.13	11.07	16.11

Source: Datacomex, Spanish Secretariat for Trade

7. Pakistan Rice Industry

Rice is Pakistan's third largest crop in terms of area sown, after wheat and cotton. About 11% of Pakistan's total agricultural area is under rice. Pakistan is a leading producer and exporter of Basmati and IRRI rice (white long grain rice). Rice ranks second among the staple food grain crops in Pakistan and exports are a major source of foreign exchange earnings. Pakistan grows a relatively high quality of rice to fulfill domestic and export demand. Rice accounts for 3.1% of the value added in agriculture and 0.6 percent of gross domestic product.

Pakistan has two major rice-producing provinces, namely Punjab and Sindh. Both provinces account for more than 88 % of total rice production. Punjab, due to its agro-



climatic and soil conditions, is producing 100 % of the Basmati rice in the country. IRRI rice is grown in both Punjab and Sindh.

In 2017/18 rice production is forecast at 6.9 million metric tons, 1.5% above the current year’s updated production. Area is expected to increase marginally from the revised official 2016/17 area. Production and yields during the last three years have been good with little fluctuation. This is due in part to the deposit of a nutrient rich top layer of soil as a result of several floods in recent years.

In 2017/18 consumption is forecast at 2.9 million tons at par with the current marketing year. Unlike many other Asian countries, rice is not considered a staple food crop in Pakistan. Traditionally, 40 to 45% of the crop is used for local consumption, with the balance exported. Pakistanis, in general, prefer the higher priced Basmati rice if they can afford it, if not they consume long grain IRRI rice, but wheat is the favoured staple.

The following table shows Pakistan’s top export destinations in EU28 for Rice:

Rank	Country (US\$ Million)	Export Value to EU 2014	Export Value to EU 2015	Export Value to EU 2016	Export Value to EU 2017
1.	United Kingdom	123.64	61.93	34.16	37.34
2.	Belgium	36.43	31.39	28.17	24.35
3.	Italy	25.72	16.83	16.48	20.45
4.	France	32.72	17.76	19.53	16.10
5.	Spain	16.34	20.71	10.79	15.19
6.	Netherlands	15.43	14.39	11.72	10.13
7.	Germany	12.75	10.70	10.91	9.63
8.	Sweden	4.13	4.43	4.36	4.53
9.	Denmark	2.72	3.94	4.62	3.64
10.	Poland	0.77	0.10	0.37	1.49
Total	EU28	280.12	188.30	147.71	149.75

Source: EuroStats. Market Access Database



Spain is Pakistan's 5th top export destination in EU28 for Rice during 2017 as the import value to Spain rapidly increases every year. This displays Pakistan's large potential to continue increasing exports of Rice to Spain.

8. Pakistan's Rice Competition

Rice is the grain with the second highest worldwide production, after maize. In Pakistan it's the 3rd largest crop in term of area after wheat and cotton.

Rice trade in Pakistan is carried out by the private sector with little or no intervention from the government. Since the publicly-run Rice Export Corporation of Pakistan was disbanded 20 years ago, Pakistan's rice traders have responded well to market liberalization and over the years have become major players in world rice trading. The milling industry made significant investments in state-of-the art processing machinery, but Pakistan exports most of its rice in bulk with no modern packaging and branding. Export companies could be doing more to develop brands and a more significant presence in foreign markets. However, the export industry is comprised of a large number of relatively small firms that are often family-run and accustomed to traditional trading practices. However, that is changing and Pakistan's rice exporters are becoming increasingly active advocates for their industry and their trade interests. With time, the industry is expected to adopt more strategic and brand-based approaches to rice exporting.

Pakistan has so far exported 1.22 million metric tons as compared to 1.72 million metric tons during the same period a year ago. In 2017/18 rice exports are projected at 4.0 million metric tons down 7% from the last year's figure of 4.3 million metric tons. Pakistan's rice exports are facing stiff competition from Vietnam and Thailand. Currently the exporters from these countries are quoting prices in the range of \$355-360 per ton for 5% broken rice, while prices for Pakistani rice in the same category is hovering around \$380 FOB Karachi. It may be too early to tell if higher prices in Pakistan are the result of "hoarding" or market manipulation, a common, though difficult to prove refrain, or



something more fundamental with the supply and demand situation. Time will tell, though exports are expected to be somewhat lower.

The domestic market is protected from imports by a 10 %t tariff and strong preferences for domestic rice.

By and large average rice yield in Pakistan, in spite of technological development, is comparatively low than China, USA, North Korea, South Korea, India, Bangladesh, Vietnam, Philippines, Brazil, Egypt, Iran, etc. It needs to increase in order to sustain food security at home and maintain shares in world markets. The quality of produce also suffers due to defective harvesting methods and out-dated processing technology and admixtures during various stages of processing and marketing.

Trading in rice both in domestic and international markets has become more quality conscious. Even in the local markets buyers now demand quality rice. In order to meet the challenges under the WTO regime, it is now very essential for the country to put together its rice production and marketing strategies to match the demand of international markets.

Spain's imports of Rice- Pakistan's Competition

Rank	Destination	Volume 2016 (US\$ Million)	Volume 2017 (US\$ Million)	Variation
1.	Thailand	20.92	21.23	+1.5%
2.	Pakistan	11.07	16.11	+45.5%
7.	India	3.92	5.20	+32.6%
8.	Cambodia	4.28	3.86	-9.8%
18.	Vietnam	0.22	0.29	+31.8%
34.	China	0.02	0.0001	-99.9%
43.	Bangladesh	0.0	0.000002	+0.02%
-	Total	93.04	94.04	-0.90%

Source: Datacomex, Spanish Secretariat for Trade



9. Market Access

European Legal Requirements

To export rice to Europe, you have to deal with strict rules and obligations on food safety. The General Food Law, which regulates food safety in the European Union, also applies to all rice varieties. Suppliers must ensure that products are traceable and that safety systems (such as HACCP: hazard analysis and critical control points) are in place.¹⁴

Additional requirements¹⁵

-Control of arsenic levels in rice

A review by the European Food Safety Authority (EFSA) showed high levels of inorganic arsenic in rice. Based on this review, Regulation 2015/1006 has been introduced. It sets the following inorganic arsenic limits, as listed in the Table below.

Arsenic limits for rice

Non-parboiled milled rice (polished or white rice)	0.20 mg/kg
Parboiled rice and husked rice (brown rice)	0.25 mg/kg
Rice destined for the production of food for infants and young children	0.10 mg/kg
Rice waffles, rice wafers, rice crackers and rice cakes	0.30 mg/kg

Source: CBI - Centre for the Promotion of Imports from developing countries

-Maximum residue limits

For exporting speciality rice varieties to Europe, maximum residue limits (MRLs) must be taking into account.

¹⁴ <https://www.cbi.eu/market-information/grains-pulses/specialty-rice-varieties/>

¹⁵ <https://www.cbi.eu/market-information/grains-pulses/specialty-rice-varieties/>



You can find the maximum residue limits (MRLs) for pesticides that might be used on rice in the EU Pesticide Database. Using the term “rice” (code number 0500060) or the type of pesticide as search terms will yield the corresponding MRLs for rice.

A recent change, effective from 2017, is the reduced residue limit for Tricyclazole in rice from 1 mg/kg to 0.01 mg/kg. Importers are worried that this change will affect the trade flows from major supplying countries such as Vietnam and Pakistan. The decreased residue limit allowed means that Tricyclazole in rice cultivation should be avoided.

-Certificate of authenticity for Basmati

To export basmati rice to Europe, a certificate of authenticity is required

Basmati is exported from India and Pakistan. In these countries, you can apply for such a certificate with the Export Inspection Council (India) and the Trading Corporation of Pakistan.

The approved varieties of basmati rice are:

- Basmati 370
- Basmati 386 (India) Type-3 (Dehradun India)
- Taraori Basmati (HBC-19 India) Basmati 217 (India)
- Ranbir Basmati (India) Kernel (Basmati Pakistan) Pusa Basmati
- Super Basmati

The Commission Regulation (EC) No 972/2006 has laid down special rules for imports of basmati rice and a transitional control system for determining their origin. This regulation allows basmati with up to 5% impurity from non-basmati varieties.

The certificate of origin is also needed to exempt basmati from import duties.

-Food safety certification

Food safety is a top priority in all European food sectors. Therefore, most buyers will request additional guarantees from suppliers in the form of certification. For both the



production and the processing of rice (husking, milling and packaging), it's necessary to comply with recognized food safety management systems.

-Organic certification

The market for organic rice is growing, but regulation is strict. To supply organic rice to the European Union, it's necessary to use production methods as laid down in European Union legislation. Any pesticide residue or cross contamination should be avoided.

Quality

The European Commission has set a standard for paddy rice in Council Regulation No 1785/2003. The standard quality of paddy rice according to European legislation shall:

- be of a sound and fair marketable quality, free of odor;
- contain a moisture content of maximum 13%;
- have a yield of wholly milled rice of 6 % by weight in whole grains (with a tolerance of 3% of clipped grains), of which a percentage by weight of wholly milled rice grains which are not of unimpaired quality:
 - chalky grains of paddy rice: 1.5–2.0%;
 - grains striated with red: 1.0%;
 - spotted grains: 0.50%;
 - stained grains: 0.25%;
 - yellow grains: 0.02%;
 - amber grains: 0.05%.

European regulation distinguishes four size categories, based on grain length (L) and length/width (L/W) ratio.

- Long A: $L > 6.0$ mm, $L/W < 2.1-3.0$
- Long B: $L > 6.0$ mm, $L/W = 3.0$
- Medium: $L > 5.2$ mm, $L/W < 3.0$
- Short: $L < 5.2$ mm, $L/W < 2.0$



There is also an international standard for rice, set by the Food and Agriculture Organization (FAO) in the Codex Alimentarius. This standard applies to husked rice, milled rice and parboiled rice, all for direct human consumption. Rice must have the following features:

- free of abnormal flavours, odours, living insects and mites;
- moisture content max. 15% (or lower, depending on climate, duration of transport and storage);
- impurities of animal origin (including dead insects), max. 0.1%;
- other organic extraneous matter (foreign seeds, husk, bran, fragments of straw), max. 0.5% (milled) or 1.5% (husked);
- inorganic extraneous matter (stones, sand, dust, and so on): max. 0.1%.

Other important components related to quality are:

- shape
- colour
- integrity of the grain
- milling quality
- cooking and processing behaviour
- grain fissuring

European Market Labelling¹⁶

Product labels must comply with European regulation. The following items should be on the label of pre-packed rice. On rice exported in bulk, part of this information can be provided in the commercial documents:

- official product name;
- physical condition or treatment;
- list of ingredients and allergens;
- class, size (code), number of batches, net weight in metric units;

¹⁶ <https://www.cbi.eu/market-information/grains-pulses/specialty-rice-varieties/>



- statement that the product is destined for human consumption;
- best-before date or use-by date;
- instructions or special conditions for storage or use;
- place of origin or provenance;
- name and address of the importer established in the European Union;
- name and address of exporter;
- lot marking on pre-packaged foodstuffs (to ensure the traceability of individual batches).

In addition, the label should include any certification logo (if applicable) and/or retailer logo (in the case of products marketed under a private label). English is used on the bulk labels, unless your buyer indicates otherwise. Multilingual labels are often used on consumer packaging, but the language of the destination country must in any case be included.

Packing and packaging¹⁷

Rice can be packed in different bag sizes of 5, 10, 15, 20, 25 or 50 kilograms. Bags of 20–25 kg are most common. Large bags of 1000 kg are also sometimes used. The packaging material for bulk packaging is usually woven polypropylene, but multilayer paper bags are also used for specific rice such as organic.

For other forms of packaging, you must take into account EU legislation on materials in contact with food.

Rice should be kept dry, dark, cool and well ventilated during storage, loading and shipment. Rice is often shipped as bulk cargo. If you export high-value rice, the use of shipping containers is recommended to ensure quality.

¹⁷ <https://www.cbi.eu/market-information/grains-pulses/specialty-rice-varieties/>



Market prices for rice¹⁸

Costs and margins in the rice trade differ per country, variety and quality.

Retail prices for speciality rice differ

Retail prices for rice vary a lot, depending not only on variety but also brand, package size and quality:

- Common white rice starts at around € 1 per kilogram in supermarkets.
- Specific varieties that are widely available include basmati, jasmine, parboiled and brown rice. Their prices normally range between € 2–4 per kg.
- Locally produced varieties such as Bomba “paella” rice (Spain) and Arborio “risotto” rice (Italy) have prices around € 3–5 per kg due to higher production costs.
- Organic prices can also be expected to be up to 50% higher than the conventional variety, for the same reason of higher production costs.
- Smaller varieties such as black rice, red rice and glutinous rice are not widely available. Prices are higher than the common varieties and comparable with the local European specialities. Wild rice has an exceptional value in retail of € 10–20 per kg. Therefore, you can often find it mixed with another rice product.

For exporters, it is important to realise that trade prices and retail prices are not directly linked and behave in their own way. The trade prices of rice produced in Europe have stabilised at around € 300 per tonne.

¹⁸ <https://www.cbi.eu/market-information/grains-pulses/specialty-rice-varieties/>



10. Distribution Channels

The trade channels for rice are well developed. This means that businesses are mature and experienced. Most rice, including basmati and jasmine rice, arrives in Europe in bulk through importers or traders that are specialized in sourcing, milling, trading and/or managing local brands. These are the companies that you should aim for as a supplier from a developing country.

At the retail level, the rice market in Spain is heavily dominated by large retail groups, whose brands are well established in the market that face stiff competition from store brands, which represents nearly 60 percent in value of total domestic consumption

The trade channels for milled rice and brown rice are similar, while preferences in purchasing are buyer-specific¹⁹.

Large brands dominate the supermarkets

Most rice is sold through supermarkets. This channel includes most special varieties such as basmati, jasmine, risotto and sushi rice. Large rice brand companies dominate in the European retail. Examples are:

- Ebro Foods
- Westmill
- Tilda
- Marbour

Many brands also offer rice mixed with other grains such as quinoa, bulgur or spelt.

Food industry is important as a channel

The food industry is an important channel for rice destined for ready-made meals, easy-to-cook meal packs or baby food. The food industry is often supplied by rice millers and traders. Rice can also be processed into starch for various purposes in food

¹⁹ <https://www.cbi.eu/market-information/grains-pulses/specialty-rice-varieties/>



preparation or for use as feed. Expect broken rice or feed-grade rice to have a much lower value than the rice used in food products.

Different segments for ethnic or speciality rice

Organic and health shops, catering establishments (such as restaurants), ethnic stores and street markets are a smaller segment. However, this segment can be more interesting for the lesser-known varieties.

11. Recommendations

In view of the potential of Spanish market for exports of Pakistani rice, there is a need to enhance export promotional activities in this market.

- It is highly recommended to include Alimentaria, Barcelona (International Food, Beverage & Food Service Exhibition) in TDAP Calendar for 2019-20.
- TDAP may send a high-level rice delegation comprising of exporters of rice to Spain. TDAP should give at least 3 months' notice to the Commercial Section with definite dates and details of the delegates. This will be necessary for visa recommendations, visa processing at TDAP's end and for soliciting quality and productive meetings.

12. List of Spanish Rice Companies (non exhaustive)

In Spain, the sector for rice is composed of large number of companies that usually vary every year

1. Ebro Foods, S.A.

Address: Paseo de la Castellana, nº20 , 28046
Madrid
Phone: +34 91 724 52 50
Email: comunicacion@ebrofoods.es



Website: www.ebrofoods.es
Profile: Rice and products thereof

2. Veldis S.A.

Address: C/ Puerto de Navacerrada 59, PI Las Nieves, 28935 Móstoles Phone:
+34-91-6658270
Email: info@veldis.com
Website: www.veldis.com
Profile: Import & Distribution of Food products & Beverages

3. Global Foods Trading Spain S.L.

Address: C/111, No. 17-19 Pol. Industrial Pratense 8820 El Prat
de Llobregat, Barcelona
Phone: +34 93 264 15 36
Email: info@gftonline.es
Website: www.gftonline.es
Profile: Rice and products thereof

4. Maicerias Españolas, S.A (Grupo Dacsa)

Address: Ctra. Barcelona, 5, 46132 Almacera, Valencia
Phone: + 34 961 850 052
Email: r.gambaro@dacsa.com
Website: www.dacsa.com
Profile: Rice and products thereof

5. Cámara Arrocerá del Montsià

Address: C/ Salvador Dalí, 27-29, 43870 Amposta, Tarragona
Phone: + 34 977 701 020
Fax: +34 977 700 190
Email: lacamara@lacamara.es
Website: www.lacamara.es
Profile: Rice and products thereof

6. Asian Powers S.L.

Address: Calle Santander, 60, Barcelona, 08020 , Barcelona
Phone: + 34 932788288
Fax: +34 932781999
Email: asianpowers@gmail.com
Website: www.mundicash.com/es/
Profile: Rice and products thereof



7. Jaferi,Jaferi & Sánchez S.L.

Address: C/ Archivero Joaquín Blanco Montesdeoca, 21, 35010 Las Palmas de G.C
Phone: + 34 928 232 844
Fax: +34 928 232 944
Email: comercial@jaferi.net
Website: <https://jaferi.net/>
Profile: Import & Distribution of Rice and products thereof

8. J.K. Asian Food S.L.

Address: Carrer de Sant Pau, 25, 08001 Barcelona
Phone: + 34 933 17 88 85
Email: jk@jkfood.es
Website: <http://www.jkasianfoods.com>
Profile: Rice and products thereof

9. Domingo Grau, S.L.

Address: C/ Arquímedes, 6, 08907 L'Hospitalet de Llobregat, Barcelona
Phone: + 34 93 263 22 99
Fax: +34 93 263 29 19
Email: domingograu@dgrau.com
Website: <http://www.dgrau.com/es>
Profile: Rice and products thereof

13. Trade Fairs

The 3 most important food fairs in Spain.

1. Alimentaria, Barcelona (International Food Fair)

Description: International Food, Beverage & Food Service Exhibition
Venue: FIRA, Barcelona
Dates: 20-23 April 2020
Type: Professional
Edition: 41
Website: <http://www.alimentaria-bcn.com/>



2. Salon Gourmet (International Food Fair)

Description: International Fair of Food and Beverage Quality
Venue: IFEMA, Madrid
Dates: 8-11 April 2019
Type: Professional
Edition: 33
Website: <https://www.gourmets.net/salon>

3. Gastrónoma, Valencia (International Food Fair)

Description: Food Exhibition
Venue: Feria Valencia
Dates: 11-13 November 2018
Type: Professional
Edition: 33
Website: <https://gastronoma.feriavalencia.com/>

14. Associations

1. UNIAD E (Association of Spanish Rice Industries)

Address: Av. del Cid, 2 Puerta 4C 46018, Valencia
Phone: +34 963 522 977
Fax: +34 963 522 628
Email: info@uniade.es
Website: <http://www.uniade.es/index.html>

2. Federación de Arroceros (Rice Federation)

Address: Av. San Francisco Javier, 9, 41018 Sevilla
Phone: +34 954 92 29 76
Email: administracion@federaciondearroceros.es
Website: www.federaciondearroceros.es



15. Sources / References

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- Ministry of Agriculture, Fisheries and Food.
- DataComex, Spanish Secretariat for Trade, Ministry of Economy, Industry and Competitiveness.
- UNIADE. Association of Spanish Rice Industries.
- CBI UK. Centre for the Promotion of Imports from developing countries.
- USDA. Foreign Agricultural Service.
- Eurostat. European Union Statistics.
- World's Top Exports. Education and research website.
- European Commission. Market Access Database.
- RICEPEDIA. Online encyclopedia that aims to provide all necessary information about rice, rice production, and its impact on the world.
- Directorio Cámaras. Export and Import Spanish Companies Directory.
- European Commission. Directorate-General for Agriculture and Rural Development.



16. Annex I. Summary of EU Rice Import Preferential Regimes

A summary of the EU’s preferential rice import regimes can be found in the table below. All quantities but the 100,000 MT² under Regulation (EC) 1273/2011 may be imported to the EU at a zero duty.

Rice Import Preferential Regimes

Regulation	Origin	Type of rice	Quantity (MT)
<u>Regulation (EC) 1273/2011</u>	United States Thailand Australia Guyana India Pakistan All origins Other origins	100630 100620 100640	63,000* & 40,216 1,634 100,000 ² & 31,788
<u>Regulation (EC) 972/2006</u>	India Pakistan	Basmati (10062017 & 10062098)	No limit**
<u>Regulation (EC) 480/2012</u>	All origins	100640 for food preparations	1,000
<u>Regulation (EC) 1964/2006</u>	Bangladesh	Rice	Equivalent to 4,000 MT of husked rice
<u>Regulation 978/2012</u>	<u>EBA countries</u>	1006	No limit
<u>Regulation 449/2010 (First come first served basis)</u>	Egypt	100620 100630 100640	22,510 81,149 92,742

Source: FAS Madrid based on EU law