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Greece

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Report Highlights:

Greece is an import dependent country, with total CY 2001 agricultural imports from the U.S. of \$115 million. Greece, the host of 2004 Olympic Games, expects tourism to double to 25 million people at the time of the Games. There are exciting marketing opportunities for U.S. foods to meet the increased demand. U.S. foods are also popular among Greeks whose lifestyles are changing.

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SECTION I. MARKET OVERVIEW

Greece is an import-dependent country (\$3.5 billion of agricultural products in 2001) with a population of 11 million people. The Greek economy is continuing to improve steadily although it is still not as strong economically as some of the other EU member states. The Greek economy grew by 4.0 percent in 2002, exceeding initial estimates of a 3.8 percent growth rate, per National Statistical Service reports. The transition to the euro in January of 2002 was an economic milestone for the country. Greece's National Statistical Service (NSS), reported that exports increased 0.5 percent while imports rose 0.5 percent in 2002. The NSS also indicated that final consumption rose by 3.1 percent and investments increased by 7.4 percent.

The Bank of Greece's (BOG), 2003 economic projections are pessimistic. The BOG expects the country's trade deficit to worsen in 2003 as a result of the Iraq war and the appreciation of the euro currency. On the contrary, the Greek government has a more optimistic view over economic developments for 2003, primarily due to the abilities of commercial entities to secure EU funding from the Third Community Support Framework.

Among the eurozone countries, Greece ranks second, after Ireland, in respect of annual inflation. Greece's inflation rate in 2002 was 3.6%. The Bank of Greece recently projected inflation for 2003 to reach 3.9 percent. The Greek Government, on the other hand, forecast inflation to be 3 percent. Inflation in August was 3.3%. In 2002, real wages rose by 3.1 percent at a time when the corresponding European average was half a percentage point higher. Greek real wages in 2003 are expected to post a 2.0 percent increase, per government's announcements. For the third consecutive year, unemployment is expected to decline, falling 0.3 percent below the eurozone average. The unemployment index in the fourth quarter of 2002 fell to 9.7 percent.

Greece is among the most popular tourist destination in the world receiving about 12.5 million visitors per year. Despite the stagnation in foreign exchange inflows, the Hellenic Tourism Organization (HTO), reported that the tourist sector continued to grow in 2001. Total overnight stays by foreign guests declined, but it was offset by an increase in Greek tourists. Sales increases in the tourism sector were satisfactory with total pre-tax earnings of the sector rising to 165 million euros in 2001 from 74 million euros in 2000. Tourism's contribution to the GDP is estimated to be 7%.

Per capita GDP in 2002 is estimated at \$12,450. CY 2001 total imports were \$30.4 billion, with EU countries being the main suppliers. Total imports from the U.S. were almost \$640 million with \$115 million being agricultural and food products.

Greece is using its position as host of the 2004 Olympic Games to undertake numerous improvements and public projects including the construction of new highways and leisure facilities. Much of this development pertains to the tourism industry, which is expected to grow to 25 million visitors at the time of the games. The American company ARAMARK in collaboration with Daskalantonakis Group were awarded the major catering contract for the food services of the Olympic Village. This contract is valued at 34 million euros.

The HRI sector will need to double its supplies before the start of the Olympics to meet the increased demand. While this may present exciting opportunities for U.S. agricultural products, unfortunately, only a limited number of Greek importers and distributors are aware of the variety of U.S. food products. This constraint extends to the HRI sector, which relies predominantly on domestic products and imports from other EU countries.

Greek/EU food safety concerns over biotech, hormone-treated beef, and poultry processing methods limit U.S. imports for the Greek market (imports for international cruise lines are not subject to the EU regulations). Demand for soy and corn products, and cotton seed are being constrained because of cumbersome import requirements for GMO products and a reluctance by the retail sector to market a product that is labeled as containing GMOs. The U.S.-EU hormone dispute and the current exclusion of the U.S. processing methods for poultry under the Veterinary Equivalence Agreement are long-term issues that need to be resolved so U.S. exporters can take advantage of growing demand for U.S. high quality beef (estimated to be \$ 2 million) and U.S. poultry in the retail market (historically \$ 2 million prior to the import ban), particularly in the resort areas.

Despite the poultry ban, an estimated \$18 million in U.S. poultry products are transhipped from Greece to the Balkan countries annually. Despite the constraint on U.S. beef imports, Post is working to identify consistent and economical supplies of U.S. beef to meet the demand for non-hormone treated beef in the HRI sector and for hormone treated beef aboard cruise ships that operate in international waters (and are therefore, exempt from EU restrictions). It is critical that these constraints be addressed to enable U.S. products to benefit from these evolving marketing opportunities and before they are locked out by competitors from the European Union.

Advantages	Challenges
Increased demand for food products due to the upcoming Olympics and the expected increase in tourism.	A limited number of importers and distributors are aware of the variety of the U.S. food products that can be exported to Greece.
12-14 million meals will be served by catering contractors during the Olympics and Special Olympics in the 100-120 Olympic venues under the responsibility of the Athens 2004 Organizing Committee. These meals will be served to athletes, escorts, journalists, media representatives, and employees	Educate the catering sector representatives about the high quality, variety and availability of U.S. food products.
HRI and retail trade is expanding	U.S. exporters are not fully aware of the existing market opportunities in the Greece market.
Greek importers favor U.S. products because of good quality and wider variety.	Average tariff levels remain high increasing products' price. GMO labeling requirements on the other hand result in consumer concern.

SECTION II. EXPORTER BUSINESS TIPS

Eighty per cent of Greece's import trade is handled through sales agents or distributors. Sales agents operate as brokers without taking legal possession of product or making imports on their own account. Agency agreements are not required to be exclusive and can cover any time period. Distributors operate on a wholesale (and in some cases, retail) basis with exclusive sales rights for certain districts or for the entire country. Retail and wholesale trade is characterized by small, family-owned and operated businesses, each of which deals in a narrow range of goods. There are 300,000 trading establishments in Greece. There are 7,000 corporations and limited liability companies engaged in wholesale trade and 3,200 corporations and limited liability companies handling retail trade.

There are several department stores, supermarkets and chains, totalling 2,424 supermarkets around the country, of which 1,862 belong to supermarket chains. The total number of stores selling food in 2001, including supermarkets, convenience and other small stores that cater to every day needs, was 14,180 compared to 14,468 in 2000, decreased by 2%. The estimated turnover of food shops in 2001, including supermarket chains and family-owned shops, was 7.45 billion euros. Supermarkets with more than 4 cashiers account for 67.5% of these sales. The "shop-within-a-shop" concept is applied to successful department stores. After the rapid changes in the supermarket sector in 2001 with mergers and high level of concentration, the year 2002 showed the tendency for acquisitions declining.

Greek consumers' unwillingness to consume, uncertainty over the future and low spirits summarize the situation that has prevailed in the market recently, and especially after the attack on Iraq. It is also interesting to note that during periods of international turmoil in the past, consumers used to stock up on foodstuffs, whereas this time the reaction has moved in exactly the opposite direction. An improvement in consumer psychology is expected in view of the Christmas period. According to trade sources consumers didn't have much room to reduce their purchases, as limiting consumption to essentials had already started to become noticeable at the end of 2002. Nevertheless, they have in no way raised consumption, in contrast to what they were accustomed to do in similar cases in the past. This restraint in consumption reflects the rise in uncertainty regarding the future, a feeling that has become widespread in society, affecting also retail trade which reacts in the same fashion. Non-stocking is a behaviour passed on from consumers to commercial companies which, acting accordingly prefer to use their stocks before placing new orders.

As Greek consumers' needs evolve, their food purchase patterns are changing. The average size household is 2.6 persons, compared to 3.5 persons 10 years earlier, while 22% of the population is over 60 years old. Increased disposable income, larger numbers of dual-income families, 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.

A Greek consumer goes shopping 3.1 times on average per month and spends, on all consumables, approximately 600 euros and his main criterion in choosing a store is not product price, but quality, convenience and the speed of purchasing. Food and beverage items represent 16.9% of total household expenditures. Milk and yogurt are purchased on average 14 times per month, followed by bread (13.8), snacks (6.1), fruits and vegetables (5.5), soft drinks, juices (5), cheese, processed meat products (4.8), meat, and fish (4.6 purchases per month). The study on shopping behavior surveyed 753 women aged 18-64, who are responsible for doing the household shopping. Over 80% had visited supermarkets and hypermarkets in the last three months, 7% of the sample shop twice a week, 39% once a week, 22% twice a month, 7% every ten days, and 21% of the sample shop once a month.

Greek households spend 16.9% of their incomes on food purchases, 17% in rent or home maintenance, while the expense on dining out and vacation represents 15.5% of income.

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. Packaging appears to be the secondary factor affecting demand, followed by special offers for various products.

Convenience and other small stores that cater to every day needs exist throughout the neighborhoods of Athens and its suburbs. These are beverage shops, mini markets, and kiosks, most of which have grown into small general stores. The main reason for their existence is to cater to the emergency needs of an area's inhabitants for products of everyday consumption, particularly when big stores are closed or when it is impractical to pay a visit to the supermarket. These shops can be called "small points of sale" and constitute an integral traditional part of the Greek market.

During the last year sales of private label brands have spread very rapidly and are expected to occupy bigger shares in the current year. Practically all chains have their own private labels on their shelves. It is estimated that private labels cover 10% of total sales. The Greek consumer, according to market's executives, has not yet fully accepted their quality, therefore, the development rate by which private label codes contribute to the chain's turnover does not exceed 1% per year. According to a recent study, seven chains that were surveyed carried two thousand private label items and they had plans to develop another 670 private labels. It is estimated that all big chains together carry more than five thousand private labels.

Food safety, although not neglected by the average consumer, is still not as big an issue in Greece as in some other EU countries. The Hellenic Food Authority (HFA), is the authority which has full responsibility for setting and implementing a control system for companies producing, manufacturing and processing food products as well as companies trading and distributing them up until the point they reach the consumer. Food products including biotech ingredients should indicate the presence of genetically modified organisms on their labels, based on EU rules. Bulk ingredients, such as vegetable oil sourced from GM crops, must be accompanied by certification by the exporter that the product includes only EU-approved varieties. If the exporter makes a good faith effort to exclude GM entirely, this too should be certified. Non EU-approved GM varieties are not admissible. The GOG will conduct its own testing to verify exporter certification.

Greece, as a member of the European Union (EU), fully complies with about 90% of EU regulations. Labeling and ingredient legislation for all food and agricultural products is based on EU rules and regulations. Additionally, Greece maintains specific labeling and ingredient rules for some food products under the Greek Food Code. Greece requires that labels be in the Greek language. Multi-language labels are accepted.

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.

Food and beverage products of U.S. origin complying with EU rules and regulations would not require special permits (nor they are subject to special rules or regulations) for commercialization in Greece. However, biotech products are handled quite strictly (see above). If a U.S. food product, other than food supplements, conforms to any single EU member state's rules and regulations it can then be transhipped and sold in any other EU member state. For additional information on EU Import Regulations and Procedures, please refer to: www.useu.be/agri/label.html.

SECTION III. MARKET SECTOR STRUCTURE AND TRENDS

The retail sector is one of the most dynamic sectors in Greece, facing rapid changes and competition as a result of the emergence of new international grocery store chains and mergers of existing companies and food processors.

There are about 850 industrial groups involved in food and beverage production, including some of the biggest and most advanced companies, with sales of approximately \$7.2 billion and net income of \$403 million. Aggressive takeovers, new market penetration abroad, diversification, coalitions with multi-national giants, and mergers within the domestic industry characterize trends in this sector for the coming years. The family structure of many Greek companies adapting to new, advanced forms of organization to better exploit the opportunities of the market. The use of electronic trade and new techniques and tools is another goal of food enterprises.

The Hotel and Restaurant industry is one of the fastest growing sectors, primarily due to the expected increase in tourism for the 2004 Olympic Games. The size of the overall Hotel Restaurant and Catering (HRC) and food service sector in Greece, which grew 9% between 1999-2001 reached sales amounting 3.4 billion euros in 2001, an increase of more than 10% from the previous year. The fast food sector's market in 2001 was 431.7 million euros, increased by 9.5% compared to 2000, while 2002 market share is 487.8 million euros.

The run up to the Olympics is having a spill over effect among Greek consumers as they are seeking to experience a wider range of international foods. Frozen and readymade foods in particular are in high demand. More than 11.5 million meals will be served in the Olympic facilities during the Olympics and the Special Olympics. Catering companies are also putting their efforts into properly covering not only the needs of these two events, but also the needs of the wider Greek market. Catering services for receptions outside of hotels recorded the highest growth. Home catering service is in demand also with an annual growth rate of 10-15%. With the expected increase in tourism, transportation food services are also anticipated to grow.

Greek food habits in the home are mostly traditional with a heavy emphasis on the Mediterranean diet. Traditional foods, barrel feta, Greek yellow cheeses, local desserts, olives, wine, traditional pasta products, butter, cod, oil and salt preserved products are still a large part of chains' sales. On the other hand, other trends are transforming eating habits outside the home and are replacing the traditional tavernas. There are changes in diet, more women working outside the home (40% of women are in the work force), and there is more disposable income, altogether combining to create a growing demand for convenience and new and diverse eating opportunities outside of the home.

Ready meals in urban centers have in many cases replaced the traditional way of preparing lunch or dinner at home. According to a recent survey published in a food magazine, more than 50% of those included in the sample (1,200 men and women, aged 18-64 years) , buy ready meals to eat at home, men leading with 62%, and women following with 57%. Of those consumers buying ready meals, the majority (69%) prefer pizzas, followed by souvlaki (Greek traditional food) (45%), chicken (22%), hamburgers/fast food (9%), pasta (8%), and Greek cooked food (5%). Ordering food at home is common in urban areas and especially in Athens. People of middle to upper income, aged 18-40 are the peak category.

In addition, the survey showed that consumers are increasingly turning to organic products, and have reduced their consumption of beef as a result of the recent beef-related food crisis (BSE). Fresh food is preferred to frozen food, since the majority of people believe it is of better quality, better taste and is preservative-free. Nevertheless, the advantages of frozen

foods such as their shelf life, economy, and availability compared to fresh foods were admitted by the survey participants. On the other hand, trade sources and food magazines report the dynamic growth of the frozen food sector with favorable future prospects which is based on the high quality of product and the fact that these products are easy to prepare. The industrial units operating in the sector are continually investing in equipment to secure high product quality, while their research and development departments are putting effort to explore the market, listening to what consumers want. Another task of them is to produce safe products. As a result, the market for frozen foodstuffs in Greece is continually growing. Competition, however, is very strong among European companies making Greek companies putting more effort to further improve product quality, increase their production and innovate to create new products.

Another remarkable point of the survey, mentioned in the above paragraph, was that the majority of the population believe that olive oil is an essential part of their diet. Olive oil comes first among consumer preferences with 96%. It also should be noted that percentages for consumption between Athens, Thessaloniki and urban centers show a big diversification.

Greek organic farming is one of the lowest organic farming shares in Europe, but prospects for growth in the sector and in organically-grown products are favorable in accordance with a recent study. The number of enterprises operating in the processing of organic products, whose numbers rose from 71 at the end of 1998 to an estimated 300 at the end of 2001 have a continually rising trend.

Poultry farming, despite various problems faced over the last years, is undergoing a period of growth which is expected to continue. According to the Poultry Enterprises of Greece and trade sources, the growth is due to a switch in consumer preferences in favor of white meat as a result of the food crises in Europe on the one hand and on the modernization of Greek poultry farms on the other. The change in eating habits has also led to an increase in demand for eggs from free-range hens. According to trade figures, total sales of Greek poultry in 2002 reached 265 mln euros.

The meat processing sector is also going through a transition to adapt to new conditions. The Greek meat sector seems to be unable to meet the market's demand and consumers' increasing attention to matters of quality. The majority of existing meat enterprises do not have appropriate infrastructure and in order to survive they must adhere to quality standards imposed by EU Legislation. According to trade sources, only 5% of the market conforms to quality standards, while during the last three years the number of slaughterhouses in Greece has dropped to 20, but 15 of these do not meet specifications. As a consequence, 90% of beef consumed in Greece is imported. Considering that meat holds an important place in the Greek diet, the demand steadily return to normal levels with consumers paying more attention to matters having to do with safety and hygiene and in general requesting more detailed information and products labeled by HACCP and ISO quality control certificates. Greek consumers believe that domestically produced meat is free of suspicion. New trends in the meat market favor higher quality, labeled products, while organic meat is also on an upward trend, although only a limited population can afford it and the organic meat market seems to have a specific consumer public which is willing to pay for the product's extra production cost.

The food crises that have been experienced in recent years in the meat market, made consumers turn to other foodstuffs, such as pulses and rice, whose markets had for years been stagnant. Pulses, which constitute the basis for the Mediterranean diet on the one hand, are healthy and economical. These two issues and their upward trend in consumption influenced companies to turn to new types of products such as organic and private label

products. Demand for organic pulses is forecast to rise, while branded products sales are recorded to be approximately 35-40% of both pulses and rice sales, 50% is sold in bulk and the remaining percentage is private label. Demand for private label products is expected to increase, because all supermarket chains have placed such products on their shelves and the volume of bulk sales will shrink.

Greek companies producing frozen and salted fish are making significant progress. The frozen seafood market records a steady growth in recent years as a result of new product introductions and higher quality standards. There is also an effect of food crises among other food products which have switched consumer preferences to healthier foodstuffs. These factors contributed to a rise in fish consumption. Per capita fish consumption in Greece is 24 kg. First in preference is codfish. Frozen fish faces competition from local fish farms. Greek fish farming companies are producing mainly sea bass and sea bream.

The dried fruit and nut sector has also been through a stage of reorganization and reform recently. The market favors companies that offer high quality products at fair prices. Moreover, despite the fact that per capita consumption of nuts in Greece is already one of the highest in Europe (8 kg), future prospects remain favorable, as Greek consumers are beginning to use nuts in cooking as well as snack food. This is expected to lead to an expansion of the market.

Beer sales in Greece, although seasonal, with 70% taking place from May to September, amounted 134.3 million euros in food stores. About 65-70% of beer consumption takes place in the "cold" market (bar, cafes) and 30-35% is sold in markets in the "warm" market. The yearly per capita consumption is 39-40 liters.

The value of the Greek wine market is estimated at 382 million euros or equivalent to 310 million liters in volume, including bottled and bulk wine. The quality of Greek wine industry has improved recently, while production has declined. CY 2002 Greek production was 3,100,000 HL. Red wine is reported to have better market potential than white wine in Greece.

In the last few years, juice sales have increased in Greece. For Greek consumers, juice signifies freshness, a healthy diet and a contemporary style of living. This category is quite receptive to new trends and is included in the functional foods. Juice sales in 2002 reached 147 million euros.

Dairy products hold a prominent place in the Greek foodstuff sector, since dairy products represent a significant part of the Greek diet in addition to their significant contribution to the Greek food and beverage industry, with shares exceeding 15% of the total. Greek dairy companies have begun the implementation of investment programs aiming at strengthening their position in the market. Per capita cheese consumption in Greece exceeds 26 kgs. The turnover from cheese corresponds to 52% of the total dairy product sales. Feta cheese is the leader of the market with sales amounting 140,000 tons, valued 1.1 million euros. The ice cream market, according to trade sources, is forecast to show an average annual growth rate of 2-3%. The 2002 sales valued 152 million euros, compared to 141 million euros in 2001. The per capita consumption is 5 liters.

The selling factors and techniques that are applicable to Greece are generally the same as those in other Western European countries. Advertising and sales promotion are usually handled by one of many local or locally stationed international companies. Advertising companies use all types of media to reach target groups.

SECTION IV. BEST HIGH-VALUE PRODUCT PROSPECTS

The Greek market provides best potential for U.S. products in the retail and the HRI market especially due to the upcoming Olympics. The following products are considered the products with the best prospect:

- ◆ Seafood products, mainly frozen
- ◆ Nuts and dried fruits
- ◆ Frozen Vegetables
- ◆ Other Frozen foods (French fries, dough, convenience foods)
- ◆ Dairy products
- ◆ Meat
- ◆ Snack foods
- ◆ Pulses
- ◆ Cereals
- ◆ Organic products
- ◆ Wine
- ◆ Beer

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

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

Foreign Agricultural Service
American Embassy
8, Makedonon Str.
GR-101 60 Athens
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APPENDIX I. STATISTICS

A. KEY TRADE AND DEMOGRAPHIC INFORMATION

Agricultural Imports from All Countries (\$Mil) / U.S. Market Share (%) 1/	\$3,484 / 3%
Consumer Food Imports from All Countries (\$Mil) /U.S. Market Share (%)1/	\$1,980/ 1%
Edible Fishery Imports From All Countries (\$Mil) /U.S. Market Share (%) 1/	\$ 113 / 3%
Total Population (Millions) / Annual Growth Rate (%)	11.0 / .5%
Urban Population (Millions) / Annual Growth Rate (%)	7.0 / 0.2%
Number of Major Metropolitan Areas 2/	1
Size of the Middle Class (Millions) / Growth Rate (%) 3/	6.5 / 0.2%
Per Capita Gross Domestic Product (U.S. Dollars)	\$12,450
Unemployment Rate (%)	9.7%
Per Capita Food Expenditures (U.S. Dollars)	\$2,500
Percent of Female Population Employed 4/	40%
Exchange Rate (US\$1 -EURO)	.854

Footnotes

1/ Use FAS's web-enabled UNTrade database (HS -digit option; Import Market Share BICO 3-Year format)

2/Population in excess of 1,000,000

3/ Middle Class Income: \$19,000-28,000 annual earnings

4/ Percent against total number of women (15 years old or above)

B. CONSUMER FOOD AND EDIBLE FISHERY PRODUCT IMPORTS

Greek Imports of Agriculture, Fish & Forestry Products
(In Millions of Dollars)

	Imports from the World			Imports from the U.S.			U.S Market Share		
	1999	2000	2001	1999	2000	2001	1999	2000	2001
BULK AGRICULTURAL TOTAL	458	473	483	50	34	56	11%	7%	12%
Wheat	93	97	92	1	1	1	0.26%	0.17%	0.04%
Coarse Grains	62	85	93	1	1	1	0.52%	0.56%	0.59%
Rice	9	9	10	1	0	1	0.02%	0%	0.21%
Soybeans	60	51	77	29	24	39	49%	47%	50%
Other Oilseeds	45	38	42	14	3	11	31%	8%	27%
Cotton	10	11	5	1	0	1	0.04%	0%	1%
Tobacco	102	96	93	2	2	2	2%	2%	2%
Rubber & Allied Gums	4	6	6	0	1	0	0%	0.04%	0%
Raw Coffee	29	37	28	0	1	1	0%	0.01%	0.02%
Cocoa Beans	4	4	5	0	0	0	0%	0%	0%
Tea (Incl. Herb Tea)	2	2	3	0	0	1	0%	0%	0.12%
Raw Beet & Cane Sugar	1	1	1	0	0	0	0%	0%	0%
Pulses	23	23	17	4	4	3	20%	18%	17%
Peanuts	11	10	9	1	1	1	1%	2%	0.49%
Other Bulk Commodities	3	3	3	1	0	1	0.12%	0%	0.52%
INTERMEDIATE AGRICULTURAL TOTAL	496	473	466	16	19	20	3%	4%	4%
Wheat Flour	2	2	2	1	0	1	0.09%	0%	0.12%
Soybean Meal	26	47	46	2	6	5	9%	13%	11%
Soybean Oil	1	1	1	0	0	0	0%	0%	0%
Vegetable Oils (Excl. Soybean Oil)	73	48	57	4	1	2	5%	1%	4%
Feeds & Fodders (Excl. Pet Foods)	86	59	60	1	1	1	0.62%	0.75%	0.79%
Live Animals	74	68	68	1	1	1	0.13%	0.12%	0.01%
Hides & Skins	36	34	55	4	5	7	11%	16%	13%
Animal Fats	1	1	1	1	1	1	39%	29%	43%
Planting Seeds	26	31	35	3	3	2	12%	11%	6%
Sugars, Sweeteners, & Beverage Bases	53	62	20	1	1	1	0.04%	0.05%	0.03%
Essential Oils	38	46	51	1	1	1	3%	2%	2%
Other Intermediate Products	80	73	71	1	1	1	1%	2%	2%
CONSUMER-ORIENTED AGRICULTURAL TOTAL	2,176	2,027	1,980	20	18	17	0.92%	0.86%	0.84%
Snack Foods (Excl. Nuts)	117	108	98	1	1	1	0.31%	0.17%	0.12%
Breakfast Cereals & Pancake Mix	19	17	17	1	0	1	0.02%	0%	0.01%
Red Meats, Fresh/Chilled/Frozen	618	586	505	1	1	1	0.01%	0.01%	0.01%
Red Meats, Prepared/Preserved	34	34	37	0	0	0	0%	0%	0%
Poultry Meat	58	55	68	0	0	0	0%	0%	0%
Dairy Products (Excl. Cheese)	273	258	257	1	0	0	0.04%	0%	0%
Cheese	214	212	220	0	0	0	0%	0%	0%
Eggs & Products	10	7	10	0	0	0	0%	0%	0%

Fresh Fruit	113	90	106	2	1	1	2%	0.11%	0.60%
Fresh Vegetables	68	46	44	1	1	0	0.06%	0.04%	0%
Processed Fruit & Vegetables	119	108	116	2	2	2	2%	2%	1%
Fruit & Vegetable Juices	43	39	35	2	2	2	5%	6%	5%
Tree Nuts	40	37	45	7	7	7	17%	18%	16%
Wine & Beer	48	45	54	1	1	1	1%	0.28%	0.16%
Nursery Products & Cut Flowers	47	37	30	1	1	1	0.15%	0.02%	0.02%
Pet Foods (Dog & Cat Food)	43	39	45	2	1	1	4%	3%	3%
Other Consumer-Oriented Products	313	307	294	4	5	4	1%	2%	1%
FOREST PRODUCTS (EXCL. PULP & PAPER)	324	313	293	20	21	17	6%	7%	6%
Logs & Chips	37	36	35	1	1	1	0.06%	0.09%	0.39%
Hardwood Lumber	42	46	53	11	12	9	27%	26%	18%
Softwood and Treated Lumber	86	92	83	4	3	3	5%	3%	3%
Panel Products (Incl. Plywood)	101	89	75	4	5	4	4%	6%	5%
Other Value-Added Wood Products	59	50	47	1	1	1	1%	1%	1%
FISH & SEAFOOD PRODUCTS	280	258	262	6	7	5	2%	3%	2%
Salmon	7	7	7	1	1	1	0.76%	3%	7%
Surimi	1	1	1	0	0	0	0%	0%	0%
Crustaceans	29	32	34	3	4	2	10%	13%	7%
Groundfish & Flatfish	73	66	60	1	0	1	0.48%	0%	0.88%
Molluscs	67	60	64	2	2	2	3%	3%	3%
Other Fishery Products	103	92	96	1	1	1	0.19%	0.16%	0.04%
AGRICULTURAL PRODUCTS TOTAL	3,130	2,973	2,929	87	70	92	3%	2%	3%
AGRICULTURAL, FISH & FORESTRY TOTAL	3,733	3,544	3,484	113	98	115	3%	3%	3%

NA - Data not available (not reported) Data: Harmonized Tariff Schedule (HS 6 Digit)

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

C. TOP 15 SUPPLIERS OF CONSUMER FOODS AND EDIBLE FISHERY PRODUCTS

CONSUMER-ORIENTED AGRICULTURAL TOTAL - 400

Reporting Country: Greece Top 15 Ranking	Import		
	1999	2000	2001
	1000\$	1000\$	1000\$
Netherlands	480,981	457,252	434,292
Germany	322,566	329,227	351,465
France	408,622	366,548	287,554
Italy	275,910	259,901	257,940
Belgium	93,719	90,163	108,823
Denmark	114,404	106,669	100,720
Spain	91,573	81,951	79,210
United Kingdom	59,801	45,544	46,704
Turkey	19,594	19,674	32,412
Cote d'Ivoire	45,609	32,199	29,874
Ireland	35,304	27,870	23,831
Bulgaria	21,215	20,787	21,289
New Zealand	14,616	16,682	19,803
Austria	22,666	21,213	19,216
United States	20,077	17,526	16,641
Other	149,808	133,770	150,433
World	2,176,458	2,026,988	1,980,190

NA - Data not available (not reported) Data: Harmonized Tariff Schedule (HS 6 Digit)

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

FISH & SEAFOOD PRODUCTS - 700

Reporting Country: Greece Top 15 Ranking	Import		
	1999	2000	2001
	1000\$	1000\$	1000\$
Italy	42,694	39,571	32,296
Spain	20,754	25,102	27,840
Denmark	19,664	15,622	19,196
Morocco	21,491	15,877	19,052
Senegal	22,726	22,508	17,809
Netherlands	22,126	17,680	13,354
India	11,813	10,369	13,167
Turkey	8,131	7,158	9,795
New Zealand	6,389	5,107	9,356
Argentina	11,054	6,669	7,878
Germany	7,462	7,946	6,809
Sweden	9,788	7,651	6,376
France	6,668	6,554	5,688
United Kingdom	6,162	5,809	5,378
United States	5,748	6,596	5,182
Other	56,887	57,447	62,556
World	279,561	257,678	261,749

NA - Data not available (not reported) Data: Harmonized Tariff Schedule (HS 6 Digit)

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office