



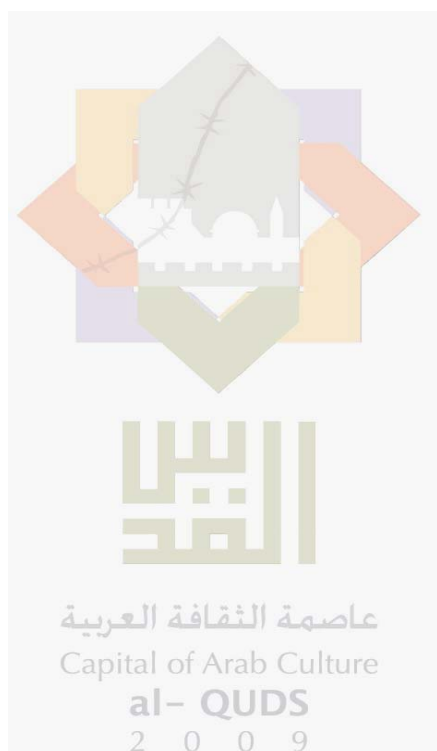
**Palestinian National Authority
Palestinian Central Bureau of Statistics**

**Survey of the Perceptions of the Owners / Managers of
Industrial Enterprises Regarding the Economic Situation,
December 2008**

Press Release on the Survey Results

January, 2009

PAGE NUMBERS OF ENGLISH TEXT ARE PRINTED IN SQUARE BRACKETS.
TABLES ARE PRINTED IN THE ARABIC ORDER (FROM RIGHT TO LEFT).



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All correspondence should be directed to:
Dissemination and Documentation Department\Division of User Services
Palestinian Central Bureau of Statistics.
P.O. Box 1647, Ramallah - Palestine.

Tel: (972/970) 2 242 6340
Fax: (972/970) 2 242 6343
E-mail: diwan@pcbs.gov.ps
Web-site: <http://www.pcbs.gov.ps>

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Press Release

Main Findings of the Survey of the Perceptions of the Owners/Managers of Industrial Enterprises Regarding the Economic Situation, December 2008

The following statement presents the basic findings of round 46th on the perceptions of the owners/managers of industrial enterprises regarding the economic situation for December 2008. The round was conducted during the period January 3-23, 2009, using December 2008 as the reference month. The aim of the survey is to observe and monitor the trends of the opinions of the owners/managers of the industrial enterprises. The sample size was 358 industrial enterprises in the West Bank, mean while work in Gaza Strip stopped due to the Israeli aggression during the compilation of the survey. A two-stage sample was designed for this survey: in the first stage, the industrial survey 2004 was used as a sampling frame for the survey, while in the second stage all the industrial enterprises constituting approximately 70% of the total industrial production, were selected.

Performance of industrial enterprises in December 2008 compared with November 2008

According to 16.7% of the owners/managers of the industrial enterprises in the West Bank, the production performance of their enterprises during December 2008 improved in comparison with November 2008.

Determinants of production cost

90.4% of the owners/managers of the active industrial enterprises during the fourth quarter 2008, reported that the effect of the political situation was the most important factor on the production cost; Alternatively 81.9% of the owners of the industrial enterprises in the West Bank pointed out that the costs of raw materials and inputs was the most important factor on the production cost. Moreover, 78.5% of the owners/managers of the active industrial enterprises in the West Bank, identified the impact of Cost of Transportation on production cost.

Borrowing and financing

Survey results show weak borrowing by the active industrial enterprises from operating banks in the West Bank during the fourth quarter 2008; 95.8% of the owners of industrial enterprises stated that they refrained from borrowing from the operating banks, while 3.8% of them applied for bank loans only one time; 0.4% applied 2-5 times.

Challenges

Drop in sales level

24.6% of the owners/managers of industrial enterprises in the West Bank indicated that the main reason was the decline in consumer purchasing power.

Exports hindrance

The owners of the active industrial enterprises during the fourth quarter 2008 indicated a number of difficulties that hinder exports; 68.1% of the owners of the exporting enterprises in the West Bank indicated that their enterprises face hindrances because of Import regulation in the foreign market hindered the export process; 67.2% believed that their enterprises face hindrances because of no regular achievement of export; 65.5% believed that their enterprises face hindrances because of the Price competition in the export market.

Local and external competition

In the West Bank, 90.4% of the owners/managers of the industrial enterprises indicated that their enterprise's main product faced local or external competition.

According to 73.2% of the owners/managers of the industrial enterprises in the West Bank, the main product faced local competition; on the other hand, 26.8% of the owners/managers of the industrial enterprises in the West Bank indicated that their main product faced external competition.

Employment

12.4 % of the owners/managers of the industrial enterprises in the West Bank laid off workers in December 2008; however, 81.0% of the owners/managers of the industrial enterprises in the West Bank stated that there was no change in the number of workers.

Expectations

Short term

The expectations of the owners/managers of the industrial enterprises in the short term, i.e., one month after the reference month (December 2008), show that 26.5% expected an improvement in their production in general in the West Bank.

The expectations of the owners/managers of the industrial enterprises in the West Bank concerning employment were pessimistic since only 11.2% expected increases during January 2009.

The results showed that 28.1% of the owners/managers of the industrial enterprises in the West Bank expected sales to increase during January 2009.

Medium term

The expectations of 50.2% of the owners/managers of the industrial enterprises in the medium term (in the next six months) were optimistic since they expected an improvement in production in the West Bank.

Concerning expectations for employment in the West Bank, 18.9% expected an increase in employment.

Sales during the next six months will rise, according to the expectations of 52.7% of the owners/managers of the industrial enterprises in the West Bank.

Figure 1: Percentage of Industrial Enterprises Owners / Managers who Encountered Improvement in Economic Conditions during December 2008 Compared to the Previous Month for the Main Indicators in the West Bank

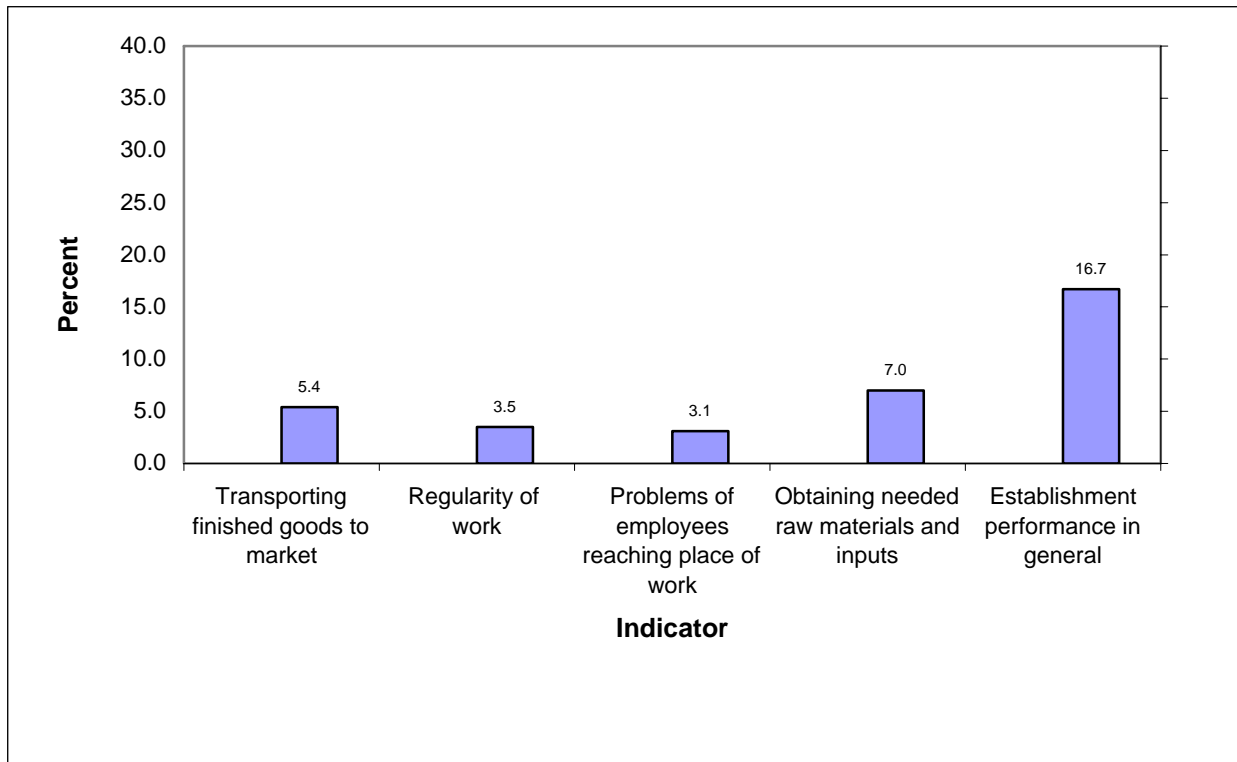
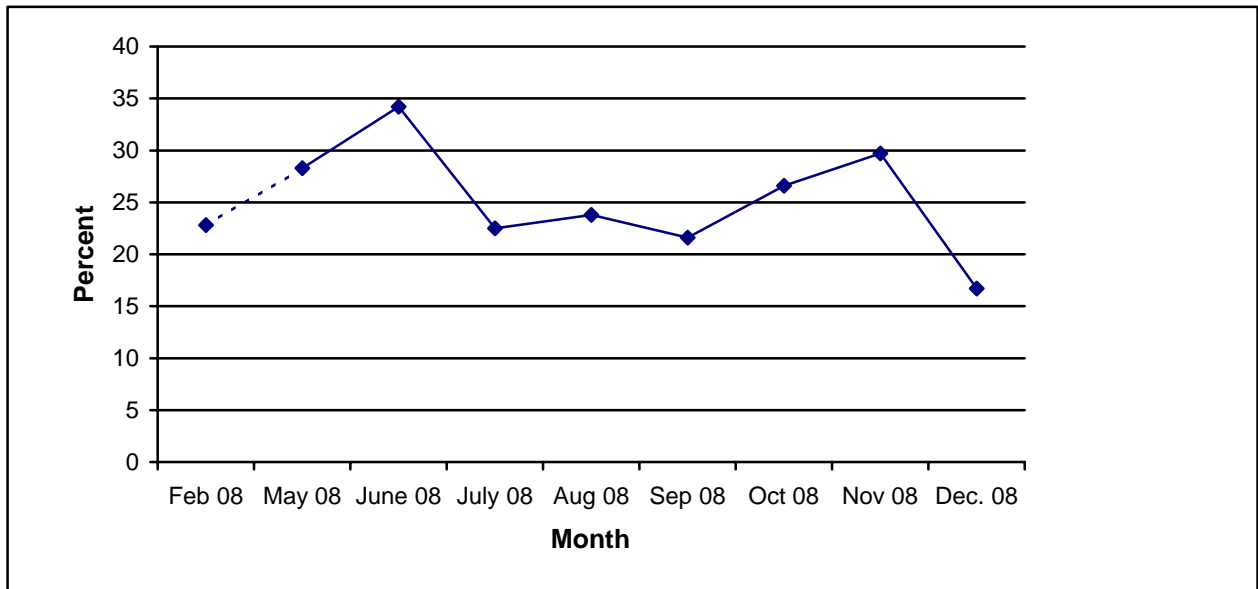


Figure 2: Trends of Enterprises Witnessed an Improved Situation in Production Performance during December 2008 Compared to the Previous Month in the West Bank



Tables

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Table 1-1: Percentage of the Industrial Enterprises Witnessed an Improved Situation During the Reference Month Compared to that before the Reference Month for the Main Indicators in the Palestinian Territory 2008

Indicator	Reference Month									
	2008									
	كانون أول Dec.	تشرين ثاني Nov.	تشرين أول Oct.	Sept.	Aug.	July	June	May	April	Mar.
Enterprise performance in general	-	25.0	24.8	21.0	22.2	20.9	27.4	23.7	-	-
Obtaining needed raw materials and inputs	-	10.6	12.2	10.5	12.4	10.6	29.8	27.9	-	-
Reaching the employees for their work place	-	3.5	6.1	3.6	3.9	3.9	26.2	25.2	-	-
Regularity of work	-	6.8	9.8	7.3	7.8	4.2	12.4	9.4	-	-
Transporting finished goods to market	-	9.2	8.5	7.1	8.3	11.4	4.5	4.6	-	-

(-) No Data Available

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2008

Table 1-2: Percentage of Industrial Enterprises Witnessed an Improved Situation During the Reference Month Compared to that before the Reference Month for the Main Indicators in the West Bank 2008

Indicator	Reference Month									
	2008									
	كانون أول Dec.	تشرين ثاني Nov.	تشرين أول Oct.	Sept.	Aug.	July	June	May	April	Mar.
Enterprise performance in general	16.7	29.7	26.6	21.6	23.8	22.5	34.2	28.3	-	-
Obtaining needed raw materials and inputs	7.0	11.7	10.6	8.8	10.6	11.1	37.3	33.6	-	-
Reaching the employees for their work place	3.1	4.4	6.5	5.0	4.8	3.9	32.6	30.1	-	-
Regularity of work	3.5	7.2	8.9	6.4	5.2	3.2	15.4	10.9	-	-
Transporting finished goods to market	5.4	11.4	8.2	8.2	10.3	13.6	5.4	5.3	-	-

(-) No Data Available

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2008

Table 1-3: Percentage of Industrial Enterprises Witnessed an Improved Situation During the Reference Month Compared to that before the Reference Month for the Main Indicators in Gaza Strip 2008

Indicator	Reference Month									
	2008									
	كانون أول Dec.	تشرين ثاني Nov.	تشرين أول Oct.	Sept.	Aug.	July	June	May	April	Mar.
Enterprise performance in general	-	7.7	18.8	19.2	18.4	15.2	2.8	4.7	-	-
Obtaining needed raw materials and inputs	-	6.4	17.7	15.1	16.7	8.9	2.8	4.7	-	-
Reaching the employees for their work place	-	0.0	4.7	0.0	1.8	3.8	2.8	4.7	-	-
Regularity of work	-	5.1	13.0	10.1	14.1	7.6	1.4	3.1	-	-
Transporting finished goods to market	-	1.3	9.4	4.0	3.5	3.8	1.4	1.6	-	-

(-) No Data Available

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2008

Table 2: Percentage Distribution of Owners/ Managers of the Industrial Enterprises According to Their Opinions of Main Indicators During December 2008 Compared to November 2008 in the West Bank

Problem	Total	Much Worse	Somewhat Worse	/ About the Same/ Unchanged	Somewhat Better	Much Better	
Enterprise performance in general	100	5.8	39.9	37.6	15.1	1.6	
Production situation	100	6.2	46.9	29.6	15.8	1.5	
Employees productivity	100	5.0	30.8	50.3	13.1	0.8	
Obtaining needed raw materials and inputs	100	1.2	10.8	81.0	5.8	1.2	
Reaching the employees for their work place	100	1.2	2.7	93.0	1.9	1.2	
Regularity of work	100	1.2	23.5	71.8	2.7	0.8	
Transporting finished goods to market	100	2.3	16.9	75.4	4.2	1.2	
Financial situations	100	5.0	35.8	46.9	10.8	1.5	
Banks credits & facilities	100	1.2	4.2	91.1	3.1	0.4	
Level of employment	100	1.5	15.4	76.1	6.2	0.8	
Value of sales	100	6.5	48.1	27.0	16.9	1.5	

Table 3: Percentage of Industrial Enterprises Witnessed an Improved Situation During the Reference Month (December 2008) Compared to that before the Reference Month for the Main Indicators by Region

Indicator	Gaza Strip	West Bank	Palestinian Territory	
Employees productivity	-	13.9	-	
Financial situations	-	12.3	-	
Banks credits & facilities	-	3.5	-	
Level of employment	-	7.0	-	
Value of sales	-	18.4	-	

(-) No Data Available

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Table 4: Percentage Distribution of Owners/Managers of the Active Industrial Enterprises According to the Reasons for Sales Level Stability or Decline by Region During December 2008

Reason	Gaza Strip	West Bank	Palestinian Territory	
Decrease in demand	-	17.4	-	
Difficulties in exporting finished goods	-	2.9	-	
Decline in the consumer purchasing power	-	24.6	-	
Product Marketing Obstacles	-	3.7	-	()
Competence product	-	4.3	-	
Seasonally related	-	18.8	-	
Military check points/ israeli actions/ closures	-	8.7	-	/ /
Other	-	19.6	-	
Total	-	100	-	

(-) No Data Available

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2008

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Table 5: Percentage Distribution of the Active Industrial Enterprises According to the Employment Mobility During December 2008 by Region

Employment Mobility	Gaza Strip	West Bank	Palestinian Territory	
Hiring employees	-	6.6	-	
Firing employees	-	12.4	-	
No change	-	81.0	-	
Total	-	100	-	

(-) No Data Available

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2008

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Table 6: Percentage Distribution of the Existing of Competition against the Main Product According to the Owners\ Managers of the Active Industrial Enterprises During December 2008 by Region

Competence existence	Gaza Strip	West Bank	Palestinian Territory	
There is competition	-	90.4	-	
There is no competition	-	9.6	-	
Total	-	100	-	

(-) No Data Available

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Table 7: Percentage Distribution of the Type of Competition According to the Owners\ Managers of the Active Industrial Enterprises During December 2008 by Region

Type of competence	Gaza Strip	West Bank	Palestinian Territory	
Local	-	73.2	-	
Foreign	-	26.8	-	
Total	-	100	-	

(-) No Data Available

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Table 8: Expectations of Owners/ Managers of the Active Industrial Enterprises for the Month that Follows the Reference Month Compared to the Reference (December, 2008) Month for the Main Indicators by Region

Indicator	Reference Month									
	2008									
	كانون أول Dec.	تشرين ثاني Nov.	تشرين أول Oct.	Sept.	Aug.	July	June	May	April	Mar.
Percentage of who are expecting better Enterprise situation										
Palestinian Territory	-	27.5	32.0	33.0	28.0	30.3	32.5	32.8	-	-
West Bank	26.5	27.3	30.7	29.8	21.6	26.3	29.6	29.4	36.0	35.4
Gaza Strip	-	28.9	39.2	46.8	58.9	53.2	54.3	46.9	-	-
Percentage of who are expecting higher employment level										
Palestinian Territory	-	12.0	10.0	16.1	15.6	10.1	11.9	15.2	-	-
West Bank	11.2	9.7	6.1	10.3	8.5	3.7	6.2	8.0	10.3	10.5
Gaza Strip	-	28.9	31.4	40.3	50.0	46.8	54.3	45.4	-	-
Percentage of who are expecting higher sales volume										
Palestinian Territory	-	27.5	30.9	33.9	28.6	28.7	32.0	33.2	-	-
West Bank	28.1	27.3	29.4	30.9	22.3	24.5	29.0	29.9	38.9	37.1
Gaza Strip	-	28.9	39.2	46.8	58.9	53.2	54.3	46.9	-	-

(-) No Data Available

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Table 9: Expectations of Owners/ Managers of the Active Industrial Enterprises for the Six Months that Follow the Reference Month Compared to the Reference Month (December, 2008) for the Main Indicators by Region

Indicator	Reference Month									
	2008									
	كانون أول Dec.	تشرين ثاني Nov.	تشرين أول Oct.	Sept.	Aug.	July	June	May	April	Mar.
Percentage of who are expecting better Enterprise situation										
Palestinian Territory	-	44.9	41.2	38.8	39.9	34.5	35.7	41.6	-	-
West Bank	50.2	44.6	39.3	35.0	35.7	30.4	32.9	38.5	49.4	57.2
Gaza Strip	-	47.4	51.0	54.8	60.7	58.7	57.1	54.7	-	-
Percentage of who are expecting higher employment level										
Palestinian Territory	-	20.9	17.4	21.6	19.2	15.1	15.4	22.3	-	-
West Bank	18.9	18.0	12.7	14.8	12.9	8.5	9.7	14.8	15.8	22.9
Gaza Strip	-	42.1	43.2	50.0	50.0	54.4	57.1	53.1	-	-
Percentage of who are expecting higher sales volume										
Palestinian Territory	-	45.6	41.1	42.5	40.9	35.1	36.6	43.9	-	-
West Bank	52.7	45.3	39.3	39.5	36.8	31.1	34.1	41.3	53.8	59.8
Gaza Strip	-	47.4	51.0	54.8	60.7	58.7	55.9	54.7	-	-

(-) No Data Available

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Table 10: Expectations of Owners/ Managers of the Active Industrial Enterprises about Better Expectations for their Enterprises for the Month that Follows the Reference Month (December, 2008) Compared to the Reference Month by Region

Indicator	Gaza Strip	West Bank	Palestinian Territory	
Enterprise performance in general	-	24.7	-	
Employees productivity	-	19.6	-	
Obtaining needed raw materials and inputs	-	7.7	-	
Reaching the employees for their work place	-	6.6	-	
Regularity of work	-	9.7	-	
Transporting finished goods to market	-	9.7	-	
Financial situations	-	15.8	-	
Banks credits & facilities	-	5.8	-	

(-) No Data Available

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Table 11: Expectations of Owners/ Managers of the Active Industrial Enterprises about Better Expectations for their Enterprises for the Six Months that Follow the Reference Month (December,2008) Compared to the Reference Month for the Main Indicators by Region

Indicator	Gaza Strip	West Bank	Palestinian Territory	
Enterprise performance in general	-	48.1	-	
Employees productivity	-	34.7	-	
Obtaining needed raw materials and inputs	-	12.3	-	
Reaching the employees for their work place	-	8.1	-	
Regularity of work	-	16.6	-	
Transporting finished goods to market	-	15.9	-	
Financial situations	-	33.6	-	
Banks credits & facilities	-	9.7	-	

(-) No Data Available

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Table 12: Percentage Distribution of Owners/ Managers of the Active Industrial Enterprises According to Their Opinions of Main Indicators for the Month that Follows the Reference Month (December, 2008) Compared to the Reference Month in the West Bank

Problem	Total	Much Worse	Somewhat Worse	/ About the Same/ Unchanged	Somewhat Better	Much Better	
Enterprise performance in general	100	2.7	26.9	45.7	23.5	1.2	
Production situation	100	3.5	33.5	36.5	24.6	1.9	
Volume of sales	100	3.1	33.8	35.0	26.2	1.9	
Employees productivity	100	2.3	21.5	56.6	17.7	1.9	
Obtaining needed raw materials and inputs	100	0.4	8.5	83.4	7.3	0.4	
Reaching the employees for their work place	100	0.4	4.2	88.8	6.2	0.4	
Regularity of work	100	0.8	10.4	79.1	9.3	0.4	
Level of employment	100	0.8	11.6	76.4	10.8	0.4	
Transporting finished goods to market	100	0.8	14.3	75.2	9.3	0.4	
Financial situations	100	2.3	29.6	52.3	15.0	0.8	
Banks credits & facilities	100	0.8	5.8	87.6	5.4	0.4	

Table 13: Percentage Distribution of Owners/ Managers of the Active Industrial Enterprises According to Their Opinions of Main Indicators During the Next Six Months Compared to Reference Month (December, 2008) in the West Bank

Problem	Total	Much Worse	Somewhat Worse	/ About the Same/ Unchanged	Somewhat Better	Much Better	
Enterprise performance in general	100	1.2	16.2	34.5	44.6	3.5	
Production situation	100	1.2	20.1	28.5	46.7	3.5	
Volume of sales	100	1.2	20.2	25.9	49.6	3.1	
Employees productivity	100	0.8	12.7	51.8	32.0	2.7	
Obtaining needed raw materials and inputs	100	0.0	5.4	82.3	10.0	2.3	
Reaching the employees for their work place	100	0.0	1.9	90.0	6.2	1.9	
Regularity of work	100	0.0	6.2	77.2	14.7	1.9	
Level of employment	100	0.4	9.7	71.0	16.9	2.0	
Transporting finished goods to market	100	0.4	10.1	73.6	14.0	1.9	
Financial situations	100	1.2	17.0	48.2	30.9	2.7	
Banks credits & facilities	100	0.4	3.1	86.8	9.3	0.4	

Table 14: Percentage Distribution of Owners/Managers of the Industrial Enterprises Opinion About the Factors Affecting Production Cost During the Fourth Quarter 2008 by Region

Factors		Opinion						
		No effect	Relatively weak effect	Weak effect	Relatively large effect	Large effect		
Foreign competition	Palestinian Territory	-	-	-	-	-		
	West bank	39.3	4.6	11.9	20.4	23.8		
	Gaza strip	-	-	-	-	-		
Informal Sector	Palestinian Territory	-	-	-	-	-		
	West bank	34.3	4.2	19.6	26.5	15.4		
	Gaza strip	-	-	-	-	-		
Local Competition	Palestinian Territory	-	-	-	-	-		
	West bank	12.7	1.5	9.6	33.5	42.7		
	Gaza strip	-	-	-	-	-		
Transport cost	Palestinian Territory	-	-	-	-	-		
	West bank	8.8	4.6	8.1	48.1	30.4		
	Gaza strip	-	-	-	-	-		
Political situation	Palestinian Territory	-	-	-	-	-		
	West bank	6.5		3.1	30.8	59.6		
	Gaza strip	-	-	-	-	-		
Costs of raw materials and inputs	Palestinian Territory	-	-	-	-	-		
	West bank	5.4	2.3	10.4	25.4	56.5		
	Gaza strip	-	-	-	-	-		

(-) No Data Available

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Table 15: Percentage Distribution of the Frequency of Loans Requested From the Banks According to the Owners/Managers of the Industrial Enterprises Opinion During the Fourth Quarter 2008 by Region

Frequency	Gaza Strip	West Bank	Palestinian Territory	
No loan request	-	95.8	-	
Once	-	3.8	-	
2-5	-	0.4	-	5-2
Total	-	100	-	

(-) No Data Available

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Table 16: Percentage Distribution of Owners/ Managers of the Industrial Enterprises According to Their Views About the Export Obstacles During the Fourth Quarter 2008 by Region

Problems	Region	Not applicable	I don't know	Large difficulty	Medium difficulty	Small difficulty	No difficulty		
Commitment to international market requirements	Palestinian Territory	-	-	-	-	-	-		
	West bank	0.9	0.0	3.5	0.9	23.9	70.8		
	Gaza strip	-	-	-	-	-	-		
Commitment to export market packaging requirements	Palestinian Territory	-	-	-	-	-	-		
	West bank	2.6	0.0	0.9	0.9	25.7	69.9		
	Gaza strip	-	-	-	-	-	-		
Price competition in the export market	Palestinian Territory	-	-	-	-	-	-		
	West bank	0.9	0.0	10.6	6.2	48.7	33.6		
	Gaza strip	-	-	-	-	-	-		
Compliance to quantity demanded and delivery time	Palestinian Territory	-	-	-	-	-	-		
	West bank	0.9	0.0	2.7	5.3	28.3	62.8		
	Gaza strip	-	-	-	-	-	-		
Export financing	Palestinian Territory	-	-	-	-	-	-		
	West bank	1.7	1.8	4.4	1.8	37.2	53.1		
	Gaza strip	-	-	-	-	-	-		
Marketing ability	Palestinian Territory	-	-	-	-	-	-		
	West bank	4.4	1.8	2.7	7.1	39.8	44.2		
	Gaza strip	-	-	-	-	-	-		
Regular achievement of raw materials	Palestinian Territory	-	-	-	-	-	-		
	West bank	0.0	0.9	6.2	8.0	38.9	46.0		
	Gaza strip	-	-	-	-	-	-		

(-) No Data Available

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Table 16 (Cont): Percentage Distribution of Owners/ Managers of the Industrial Enterprises According to Their Views About the Export Obstacles During the Fourth Quarter 2008 by Region

Problems	Region	Not applicable	I don't know	Large difficulty	Medium difficulty	Small difficulty	No difficulty		
Regular achievement of export	Palestinian Territory	-	-	-	-	-	-		
	West bank	0.9	0.9	6.2	16.8	44.2	31.0		
	Gaza strip	-	-	-	-	-	-		
Regular achievement of employee	Palestinian Territory	-	-	-	-	-	-		
	West bank	0.0	0.0	0.9	3.5	19.5	76.1		
	Gaza strip	-	-	-	-	-	-		
Palestinian export regulation and license	Palestinian Territory	-	-	-	-	-	-		
	West bank	0.8	0.9	2.7	7.1	20.4	68.1		
	Gaza strip	-	-	-	-	-	-		
Information access to the foreign market	Palestinian Territory	-	-	-	-	-	-		
	West bank	4.4	0.9	1.8	8.0	40.7	44.2		
	Gaza strip	-	-	-	-	-	-		
Traveling problems imposed on entering foreign markets	Palestinian Territory	-	-	-	-	-	-		
	West bank	1.8	0.0	3.5	20.4	35.4	38.9		
	Gaza strip	-	-	-	-	-	-		
Import regulation in the foreign market	Palestinian Territory	-	-	-	-	-	-		
	West bank	1.8	0.9	3.5	17.7	46.9	29.2		
	Gaza strip	-	-	-	-	-	-		
Costumer payment guarantee	Palestinian Territory	-	-	-	-	-	-		
	West bank	0.9	0.0	15.9	12.4	23.0	47.8		
	Gaza strip	-	-	-	-	-	-		

(-) No Data Available

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Table 17: Percentage of Mechanism of Finding Customers in the Export Market During the Fourth Quarter 2008 by Region

Approaching Customers	Gaza Strip	West Bank	Palestinian Territory
Market researches	-	53.0	-
Information gathered from commerce chamber industrial union etc...	-	27.8	-
Participate in international exhibitions and organized business missions	-	38.3	-
Self-organized visits to the export market	-	50.9	-
Personal relationships and contacts	-	91.3	-
Through internet	-	28.7	-
Customer self initiative	-	70.4	-

(-) No Data Available

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2008

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Table 18: Percentage of Distribution and Marketing Channels of Export Products to Israel Markets and Other Markets During the Fourth Quarter 2008 by Region

Achievement channel	Region and Market						
	Gaza Strip		West Bank		Palestinian Territory		
	Other market	Israeli market	Other market	Israeli market	Other market	Israeli market	
Direct sales to the customer	-	-	22.4	78.6	-	-	
Through Enterprise agency in this market	-	-	10.3	1.8	-	-	
Through palestinian agency	-	-	7.5	10.7	-	-	
Through Israeli agency as a local seller or exporter	-	-	3.8	10.7	-	-	
Through the row material provider company (reproduce)	-	-	1.9	10.7	-	-	()
No exports reported to this market	-	-	2.9	1.8	-	-	
Other	-	-	29.5	0.0	-	-	

(-) No Data Available

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