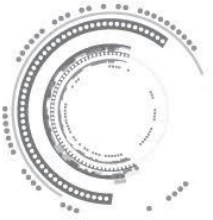




How Companies Can Respond to COVID 19 & What Growth Opportunities Might Arise

April 2020



COVID 2019 scenarios are set to follow a 3 phase outlook



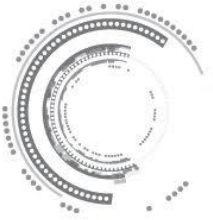
Five questions
will shape the
economic
outcomes

- 1a What will be the **LENGTH** of "Flatten"?
What are the preconditions to transition? When will we achieve them?
- 1b To what **DEPTH** does the economy drop in "Flatten"?

- 2a What will be the **LENGTH** of "Fight"?
What are the preconditions to transition? When will we achieve them?
- 2b What **LEVEL** of recovery does the economy achieve in "Fight"?

- 3 Where does the economy return to relative to the pre-COVID era in "Future"?

Source: BCG



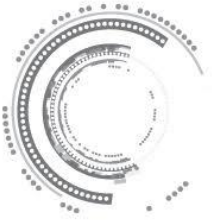
Several countries have already announced restart ambitions

- Enterprises on the other hand need to survive the Flatten phase and prepare for the Fight phase.

Stabilize Operations

Identify Opportunities

- This would require great maturity and agility in leadership as well as taking steps to accommodate for the new work dynamic and the requirements of the employees.



Guiding principles for leadership in crisis



Be visible, purposeful and authentic; communicate that way



Share only the key objectives and rationale tied to immediate action



Keep an eye on the multiple time-lines for which actions must be taken & impact measured.



Engage externally with customers and stakeholders



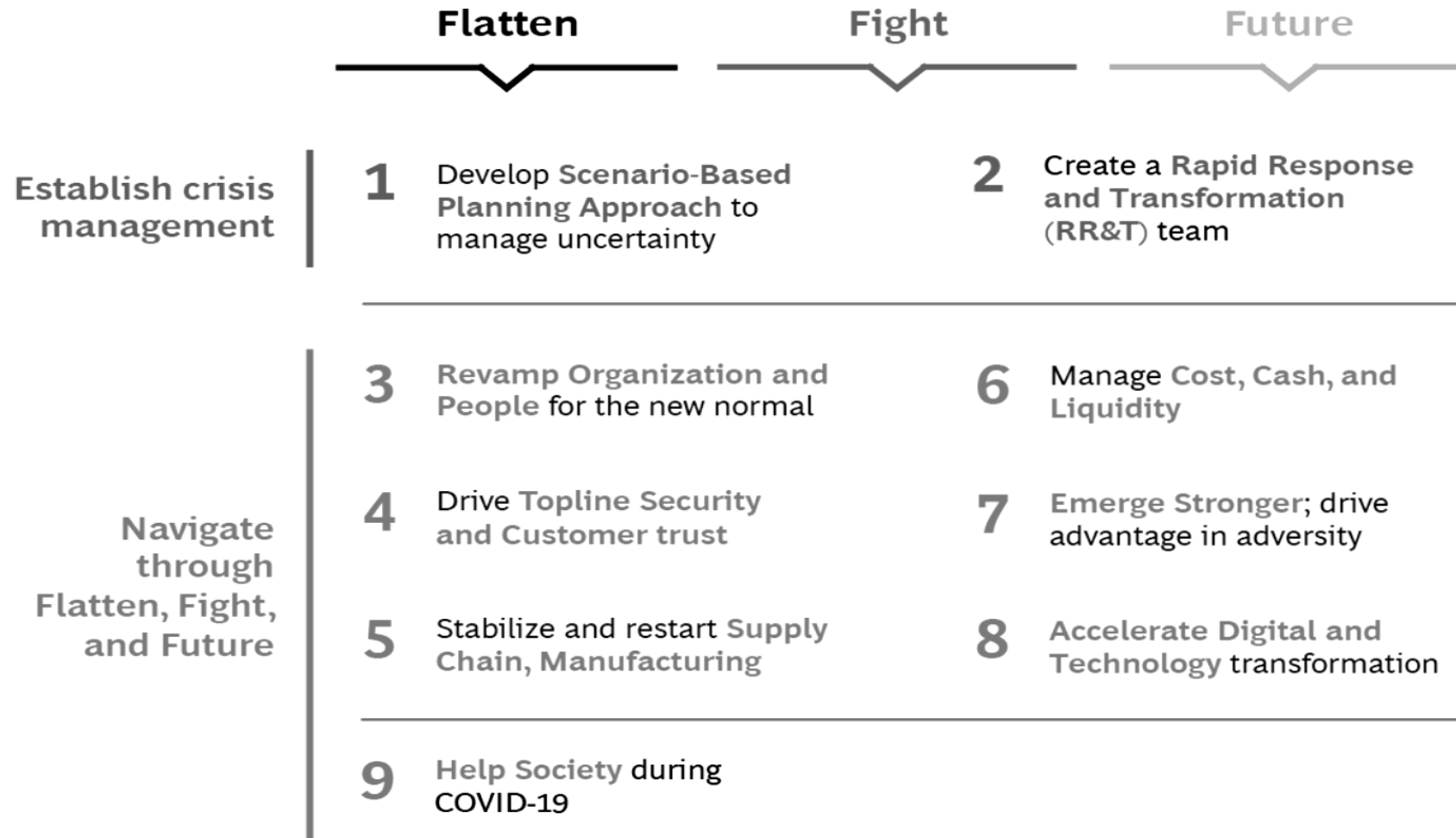
Cut through bureaucracy through a multi-functional task force

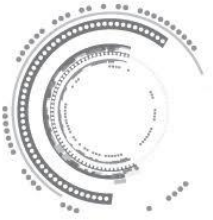


Keep imagination alive and keep looking for opportunities

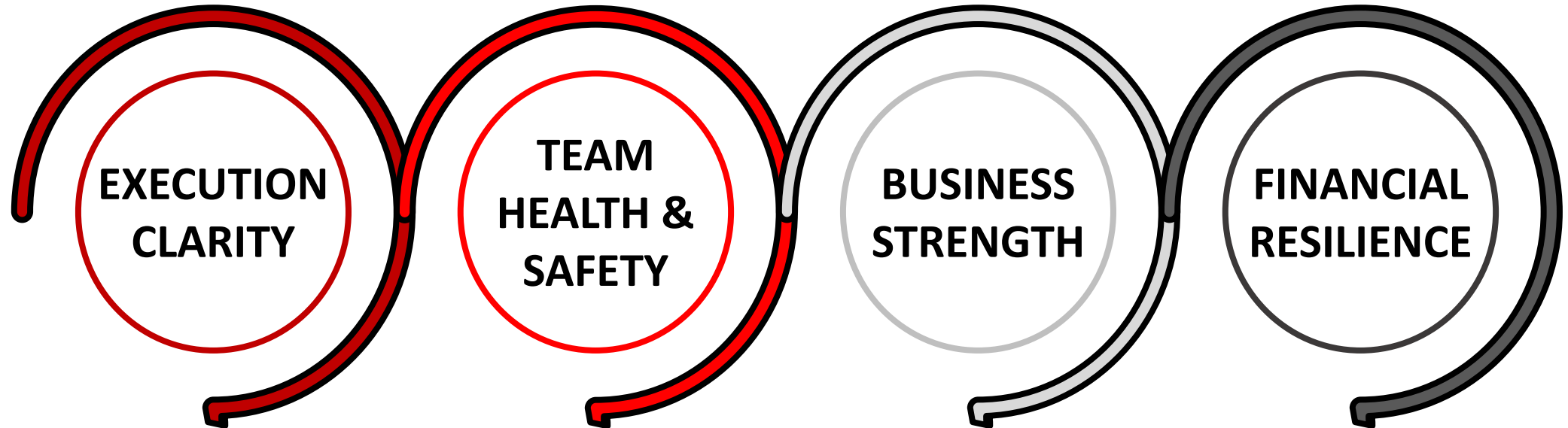


As CEO or senior management this is a time to step up

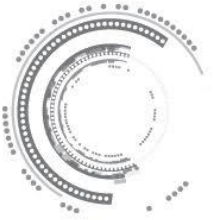




BCG has identified 4 key priorities



Source: BCG



Priority 1: Team Health & Safety

A

Reduce
Transmission Risk

This stream focuses on establishing and enforcing hygiene and cleaning best practices as well as creating workflows and work structure to reduce overlapping time slots.

B

Support Those Who
May Be Infected

Establishing policies to facilitate case reporting & self-quarantine, avail remote counselling, tele-docs and time-off options.

C

Manage Stress &
Boost Morale

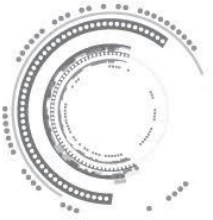
Proactive communication about all aspects of the business and efforts being undertaken. Organize information sessions and seek to answer questions.

D

Ensure Compliance
with Regulatory
Requirements

Ensure compliance with MoH regulations.

Source: BCG



Priority 2: Business Strength

A

Preserve top-line & build customer trust

Establishing a rapid response team to monitor marketing, sales & pricing implications. Seek to understand the changing customer needs. Refocus product & service offering.

B

Reinforce ability to supply

Establishing supply chain rapid response teams to assess vulnerabilities and build contingencies. Understand liquidity and business position of key suppliers. Identify and mitigate ST & LT risks.

C

Adapt resources to meet needs

Prioritize critical products/services. Explore opportunities to partner with other companies to optimize resources. Mobilize idle resources.

D

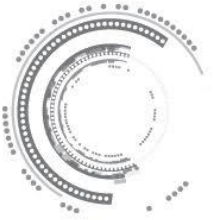
Monitor & respond to market & competitive dynamic

Track competitor situation. Examine the sector viability & identify collaboration opportunities. Redefine budgets and targets (weekly). Leverage intelligence and technology for decision making.

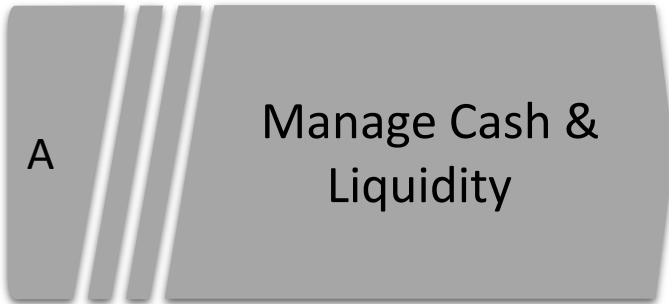
E

Prepare for bounce-back scenarios

Identify company specific scenarios. Ensure the appropriate capacity to respond to shifts in demand. Actively assess acquisition opportunities. Pre-configure comeback marketing campaigns.



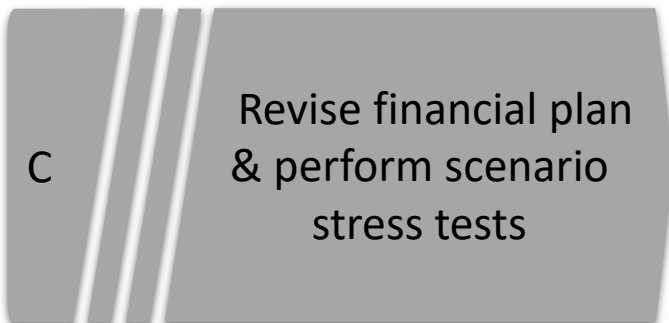
Priority 3: Financial Resilience



Forecast cash flows and manage and mitigate cash risks. Identify and secure financing options. Assess viability of current investment roadmaps.

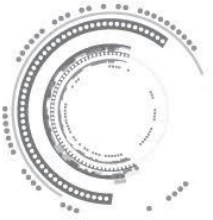


Cement procurement control processes. Seek to reduce fixed costs. Avoid conducting business as usual under pre-crisis assumptions. Mitigate and redirect discretionary spending.



Scenario planning and action plan development. Develop a rolling forecast. Engage with shareholders and revise target setting and objectives. Explore alternative and deferred compensation models for high-earning colleagues.

Source: BCG



Priority 4: Execution Clarity

A

Coordinate & scale
response planning

Set up a cross functional rapid response team (perhaps a PMO) to make clear decisions and monitor the situation and make daily decisions. Develop concrete action plans.

B

Empower the team

Tell your employees what they need to do to prevent organizational paralysis. Provide clear direction on organizational boundaries. Establish two ways communication channels.

C

Engage the
organization

Gauge current sentiment. Provide honest and frequent 360 degree communication through multiple channels. Set up a digital information hub.

D

Lead with purpose and
integrity

Consider total societal impact. Reinforce your vision, mission & purpose. Leverage resources and network to make a difference.

Source: BCG

Export Viability Research

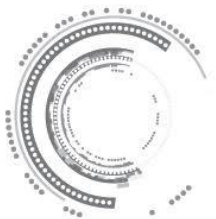
April/2020





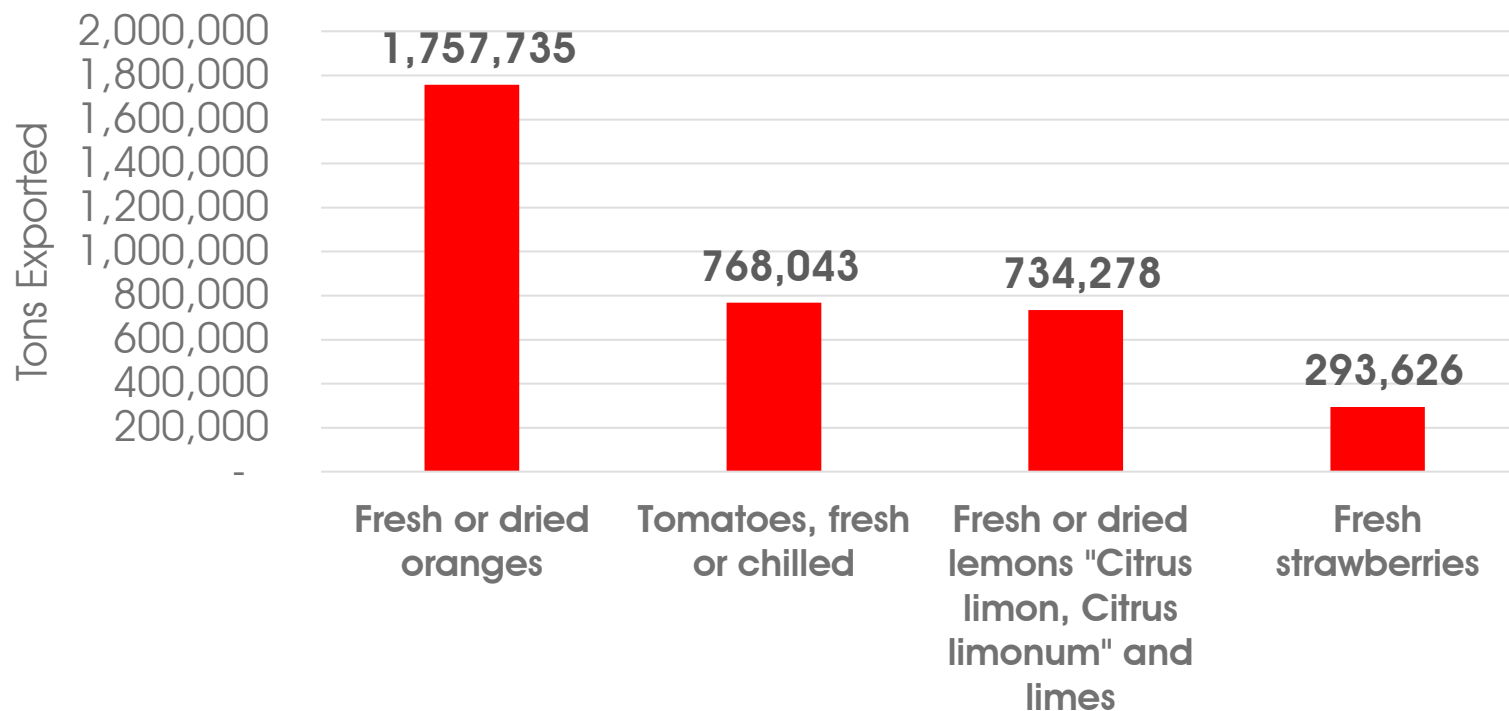
Spain

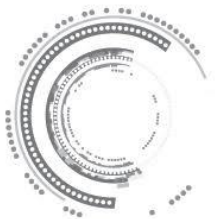
Top Matching Fresh and Processed food exports



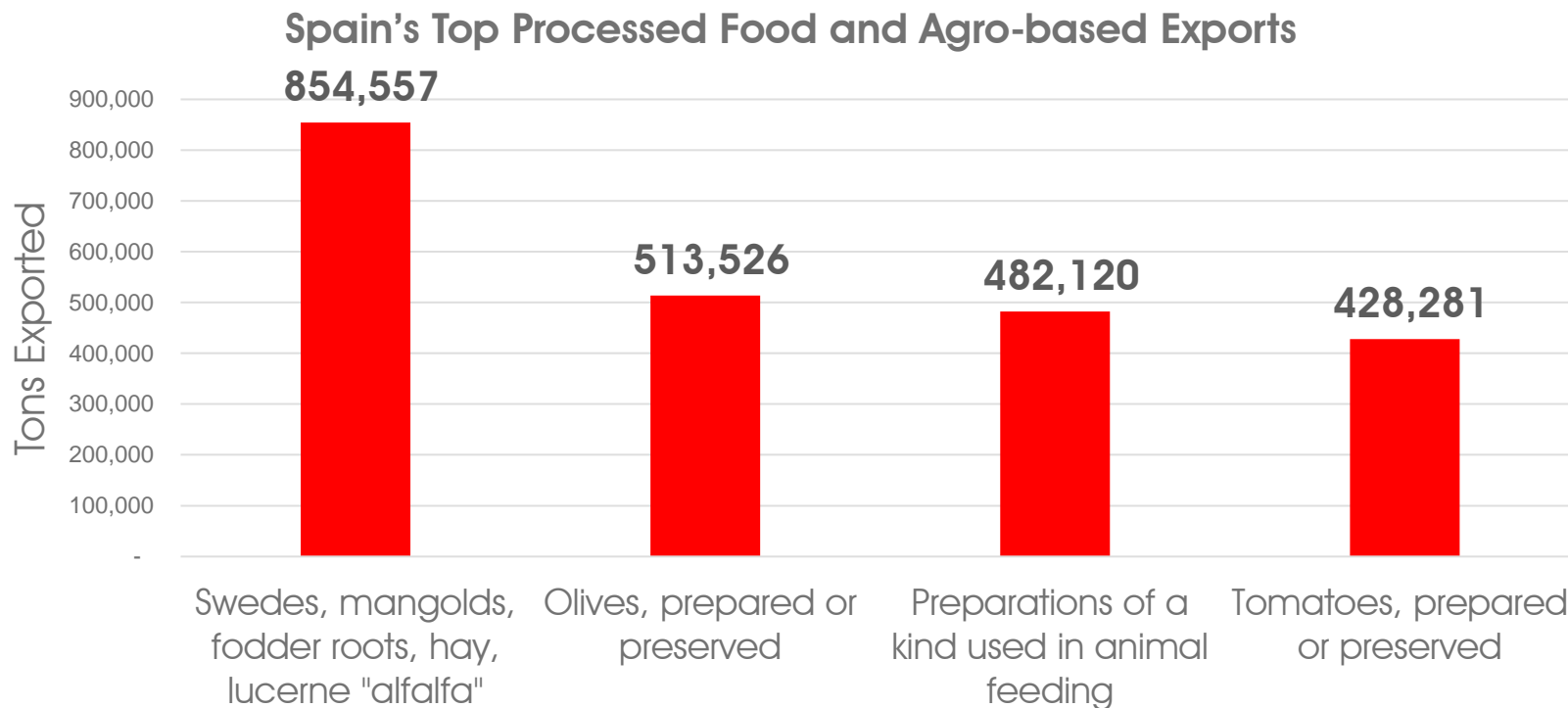
Spain's top Fresh Food Exports

Spain's top Fresh Food Exports 2019





Spain's Top Processed Food Exports





Top Importers of Fresh Food products from Spain



Germany

3,713,877 Tons
Imported from Spain



France

2,567,030 Tons
Imported from Spain



Netherlands

1,093,085 Tons
Imported from Spain



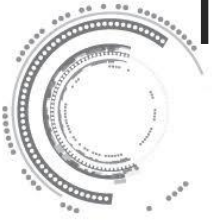
Italy

984,897 Tons
Imported from Spain



Portugal

794,159 Tons
Imported from Spain



Top Importers of Processed Food products from Spain



Morocco
261,776 Tons
Imported from Spain



Algeria
179,684 Tons Imported
from Spain



Jordan
78,556 Tons Imported from
Spain



Equatorial Guinea
73,325 Tons
Imported from Spain

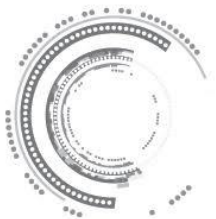


Brazil
61,403 Tons Imported
from Spain

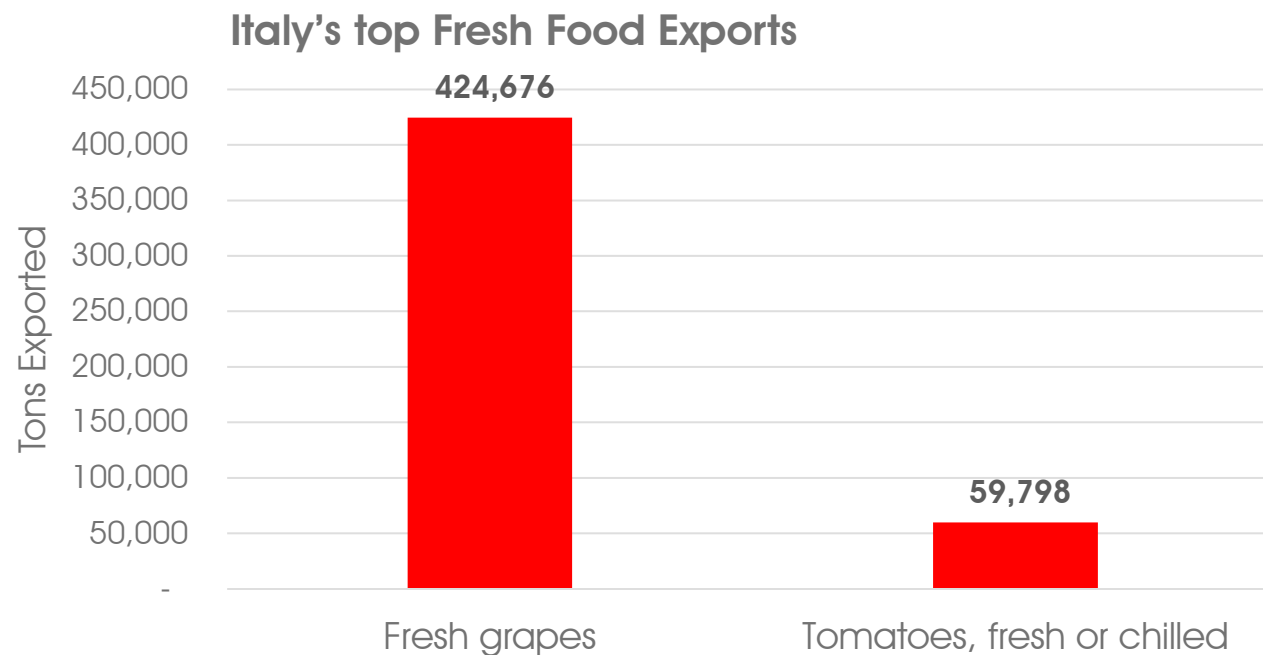


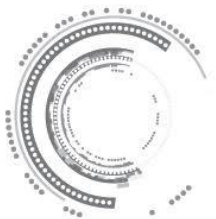
Italy

Top Matching Fresh and Processed Food Exports

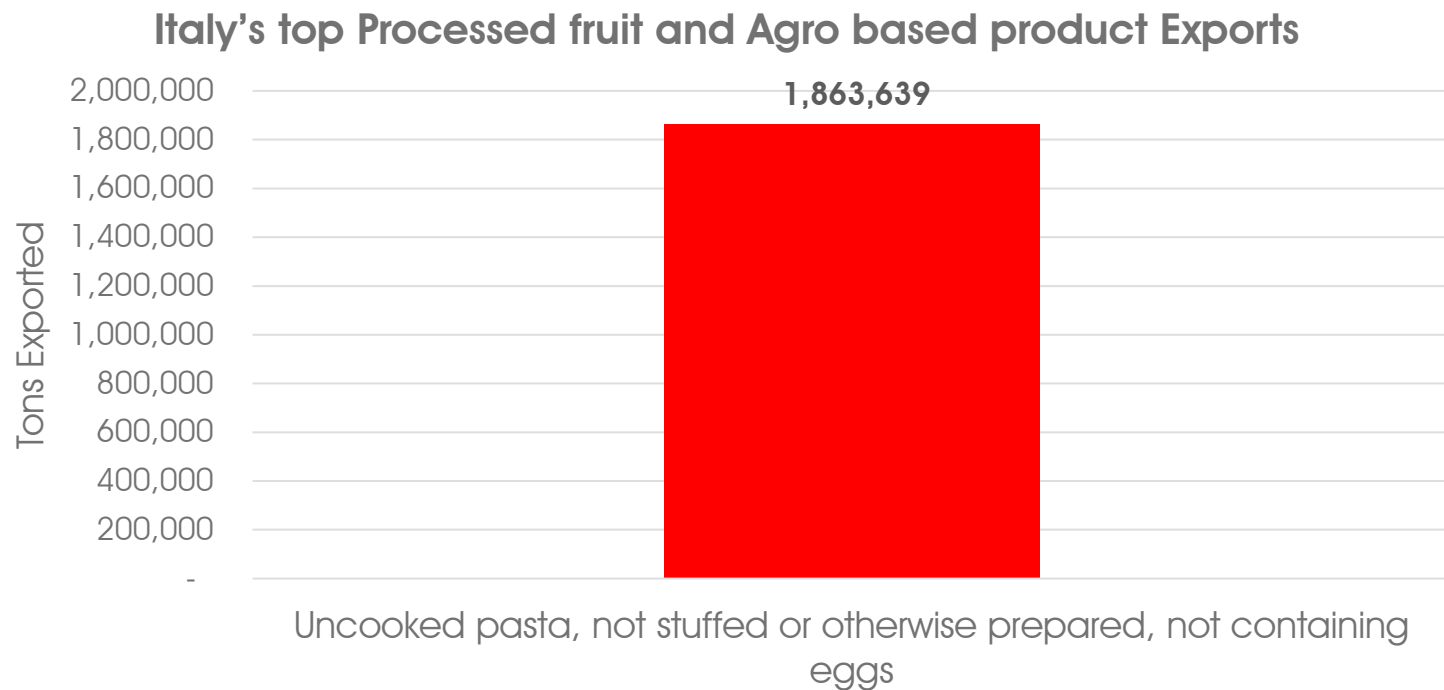


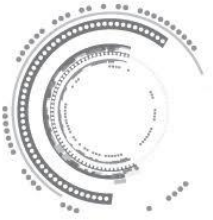
Italy's top Fresh Food Exports





Italy's Top Processed Food Exports





Top Importers of Fresh Food products from Italy



Germany
1,122,940
Tons Imported
from Italy



France
406,876
Tons Imported
from Italy



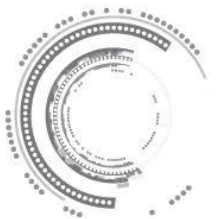
Austria
215,821
Tons Imported
from Italy



Spain
191,924
Tons Imported
from Italy



Poland
186,869
Tons Imported
from Italy



Top Importers of Processed Food Products from Italy



Germany
3,040,890
Tons Imported
from Italy



France
2,341,072
Tons Imported
from Italy



The United Kingdom
1,804,903
Tons Imported
from Italy



Netherlands
702,923
Tons Imported
from Italy

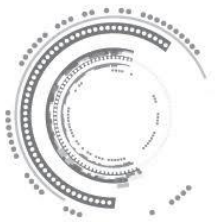


Spain
582,278
Tons Imported
from Italy

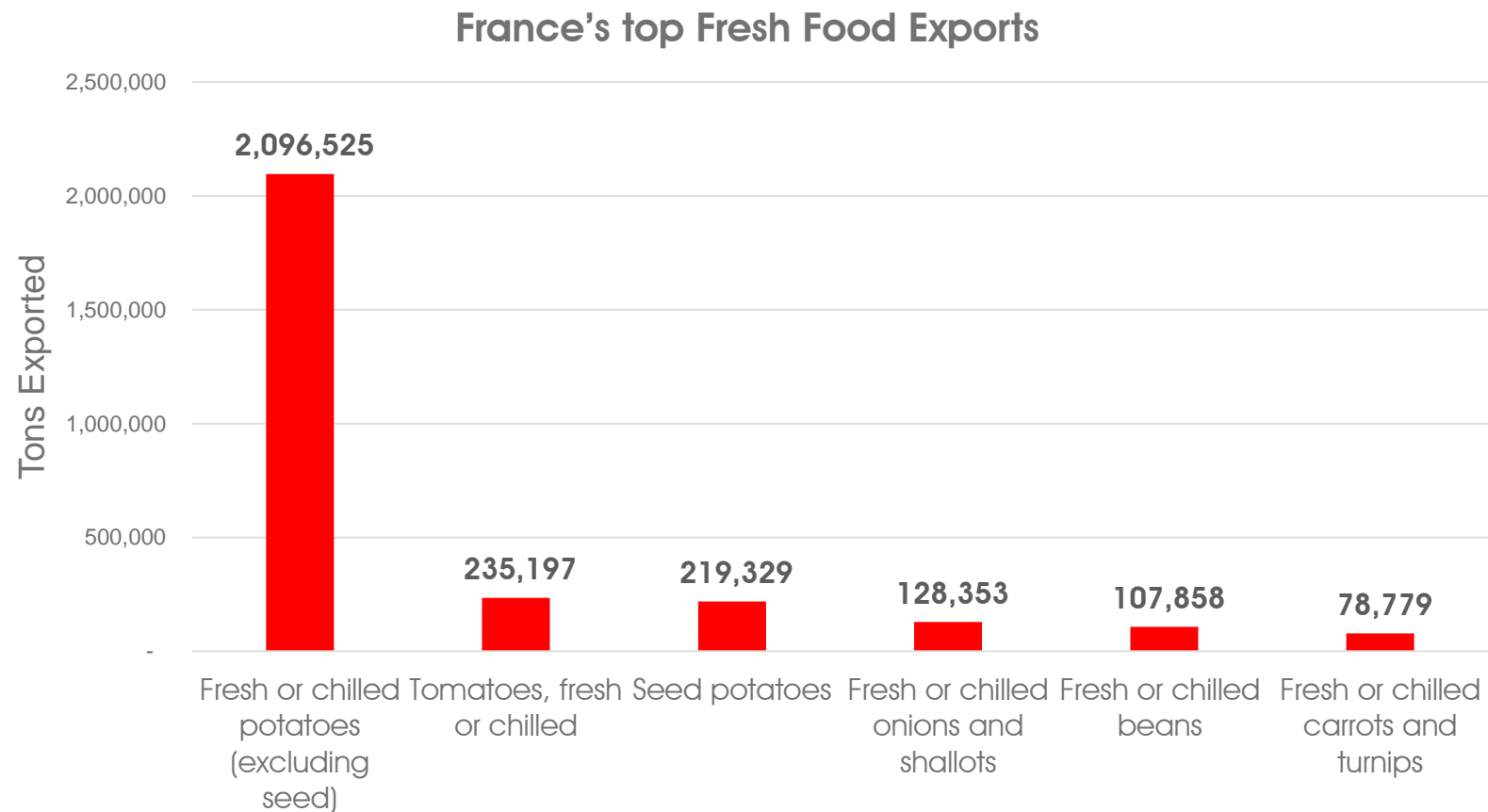


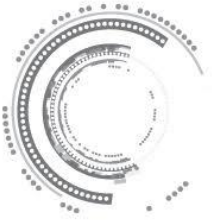
France

Top Matching Fresh and Processed Food Exports



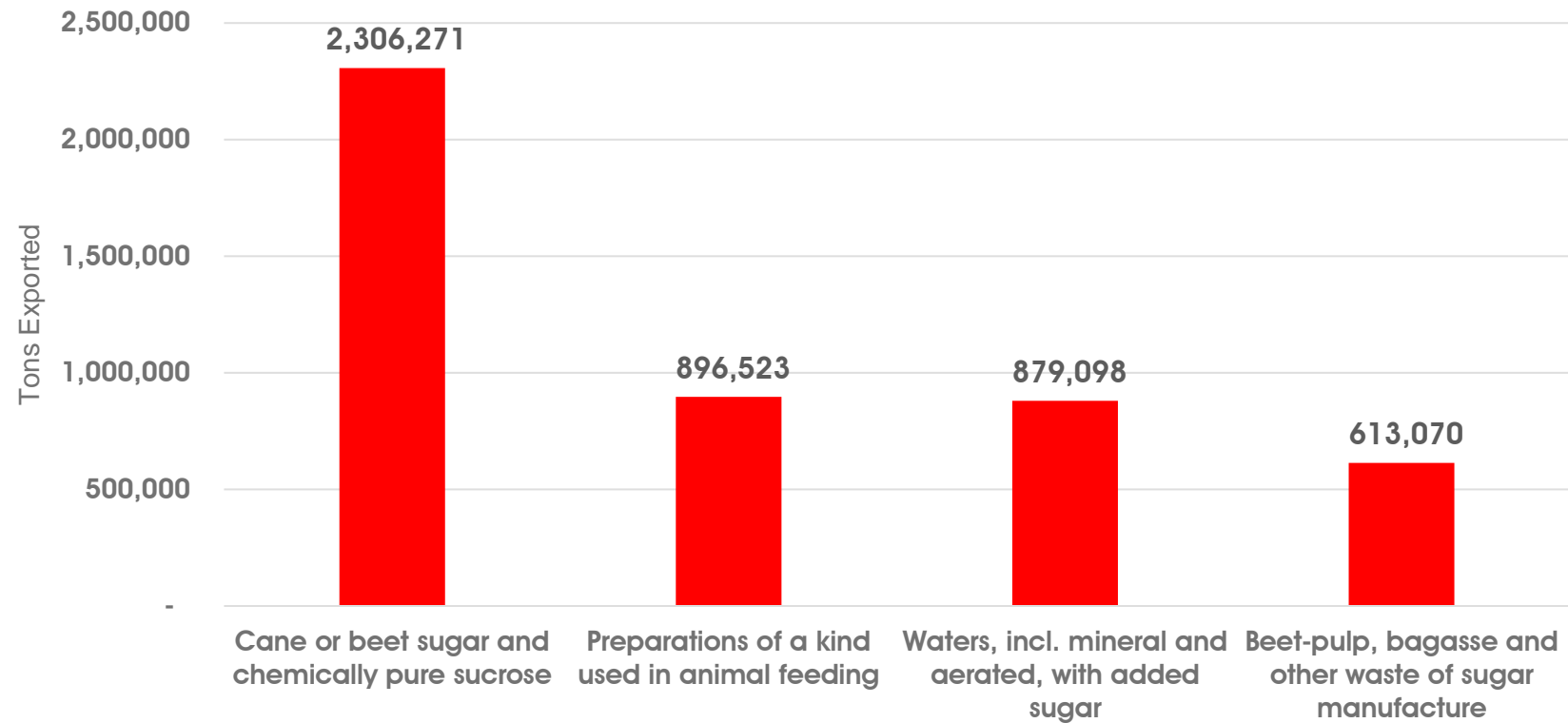
France's top Fresh Food Exports

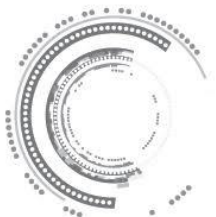




France's Top Processed Food Exports

France's top Processed fruit and Agro based product Exports





Top Importers of Fresh Food products from France



Belgium
1,074,148
Tons Imported
from
France



Spain
1,049,589
Tons Imported
from France



Italy
596,287
Tons Imported
from France



Germany
423,535
Tons Imported
from France



Netherlands
371,305
Tons Imported
from France



Top Importers of Fresh Food products from France



Germany
1,122,940
Tons Imported
from Italy



France
406,876
Tons Imported
from Italy



Austria
215,821
Tons Imported
from Italy



Spain
191,924
Tons Imported
from Italy

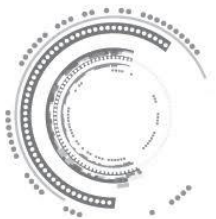


Poland
186,869
Tons Imported
from Italy

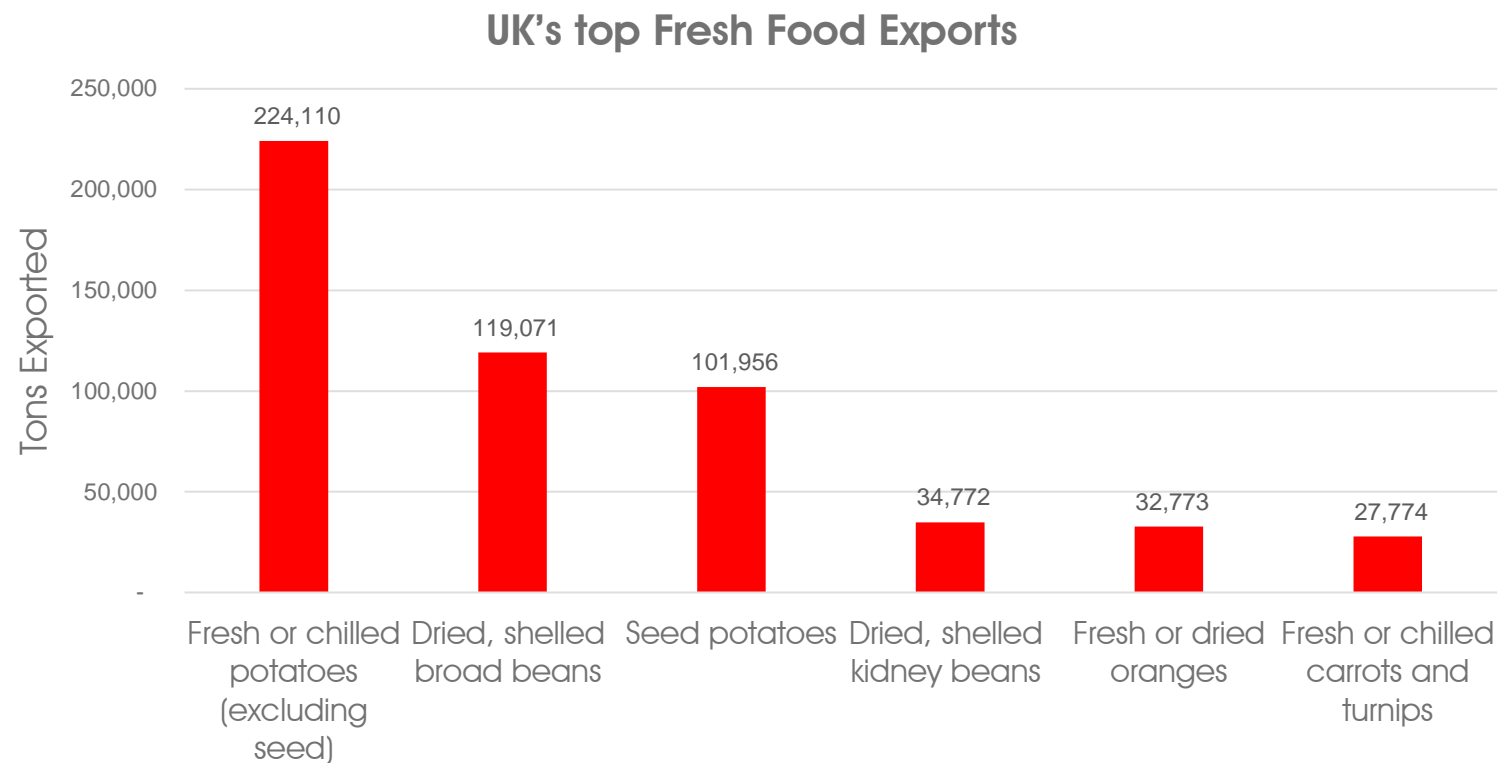


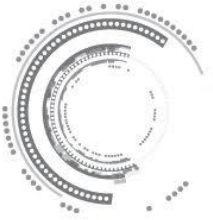
The United Kingdom

Top Matching Fresh and Processed Food Exports

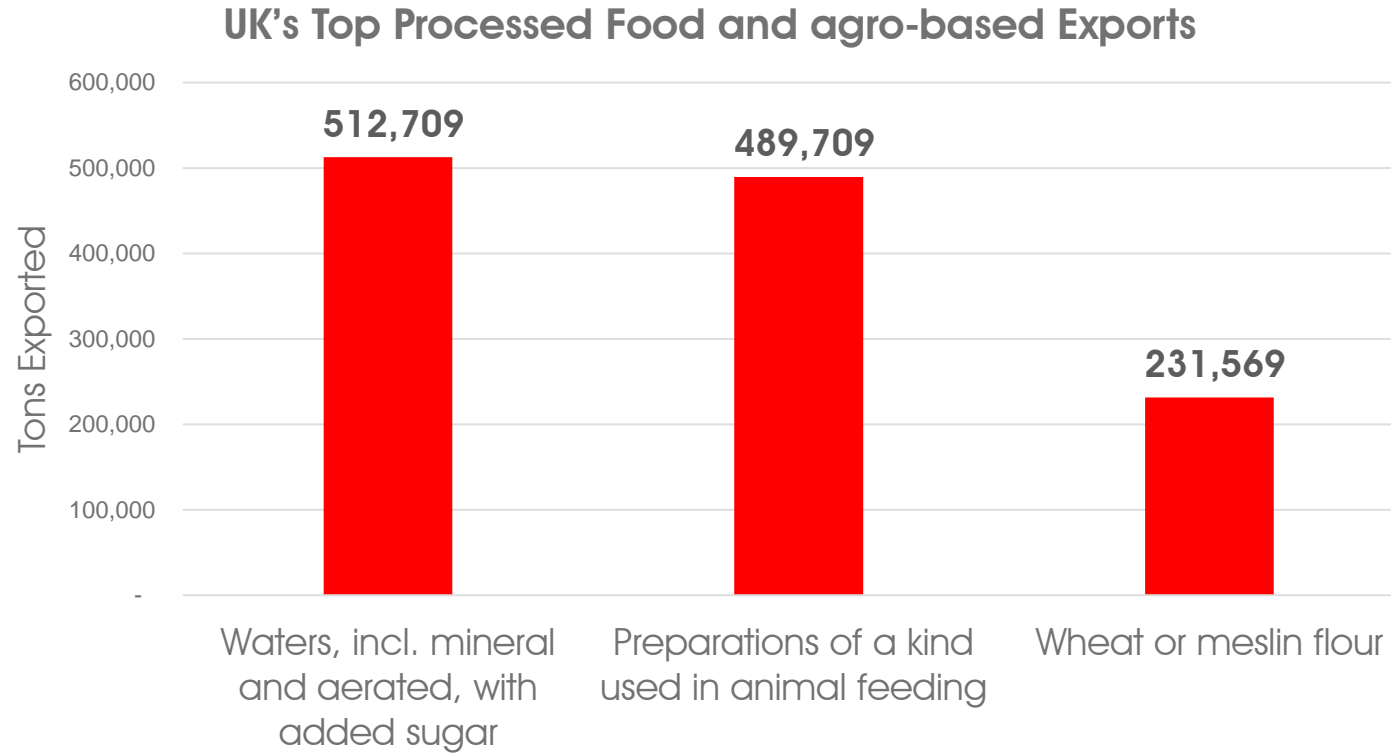


UK's top Fresh Food Exports





UK's Top Processed Food Exports





Top Importers of Fresh Food products from UK



Ireland

193,024

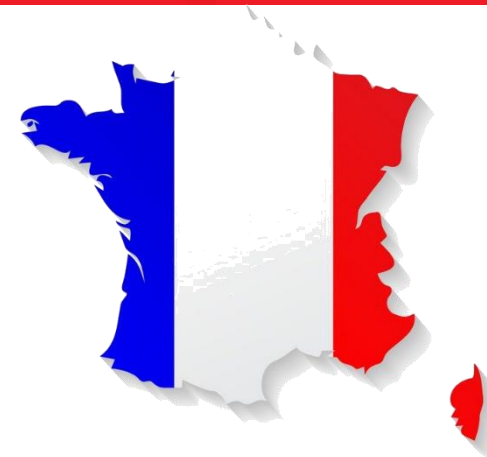
Tons Imported from UK



Egypt

178,225

Tons Imported from UK



France

116,996

Tons Imported from UK



Spain

111,159

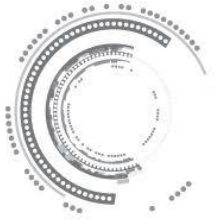
Tons Imported from UK



Netherlands

94,256

Tons Imported from UK



Top Importers of Processed Food products from UK



Ireland
3,184,434
Tons Imported from
UK



Netherlands
852,028
Tons Imported from UK



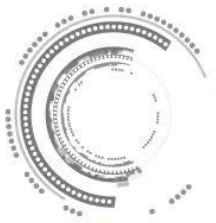
Germany
460,917
Tons Imported from UK



Belgium
354,883
Tons Imported from
UK



China
186,681
Tons Imported from
UK



Recommendations for Fresh and Processed Food

What to Export

Fresh:

- Fresh or dried oranges (Egypt currently exports \$666 Million/773K Tons)
- Fresh or chilled potatoes (excluding seed) (Egypt currently exports \$197 Million/487K tons)
- Fresh grapes (Egypt currently exports \$221 Million/96 K Tons)

Processed:

- Swedes, mangolds, fodder roots, hay, lucerne "alfalfa", clover, sainfoin, forage kale, lupines (الخضروات الجذرية (على سبيل المثال: الفجل، ومنتجات مثل السلق و الترمس (اللفت
(Egypt currently exports \$11M/44K Tons)
- Uncooked pasta, not stuffed or otherwise prepared, not containing eggs (Italy) (Egypt currently exports \$59M/59K tons)
- Cane or beet sugar and chemically pure sucrose, in solid form (excluding cane and beet sugar) France (Egypt currently exports \$183M/ 432K tons)
- Wheat or meslin flour (Egypt currently exports \$163M/424K Tons)

Where to Export

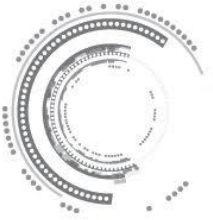
- France, Germany ,Spain, Italy, Belgium, Ireland and the Netherlands .
- Even though they are not some of the most frequent importers but due to proximity, Jordan, Morocco and Algeria are viable options.

Leather Goods

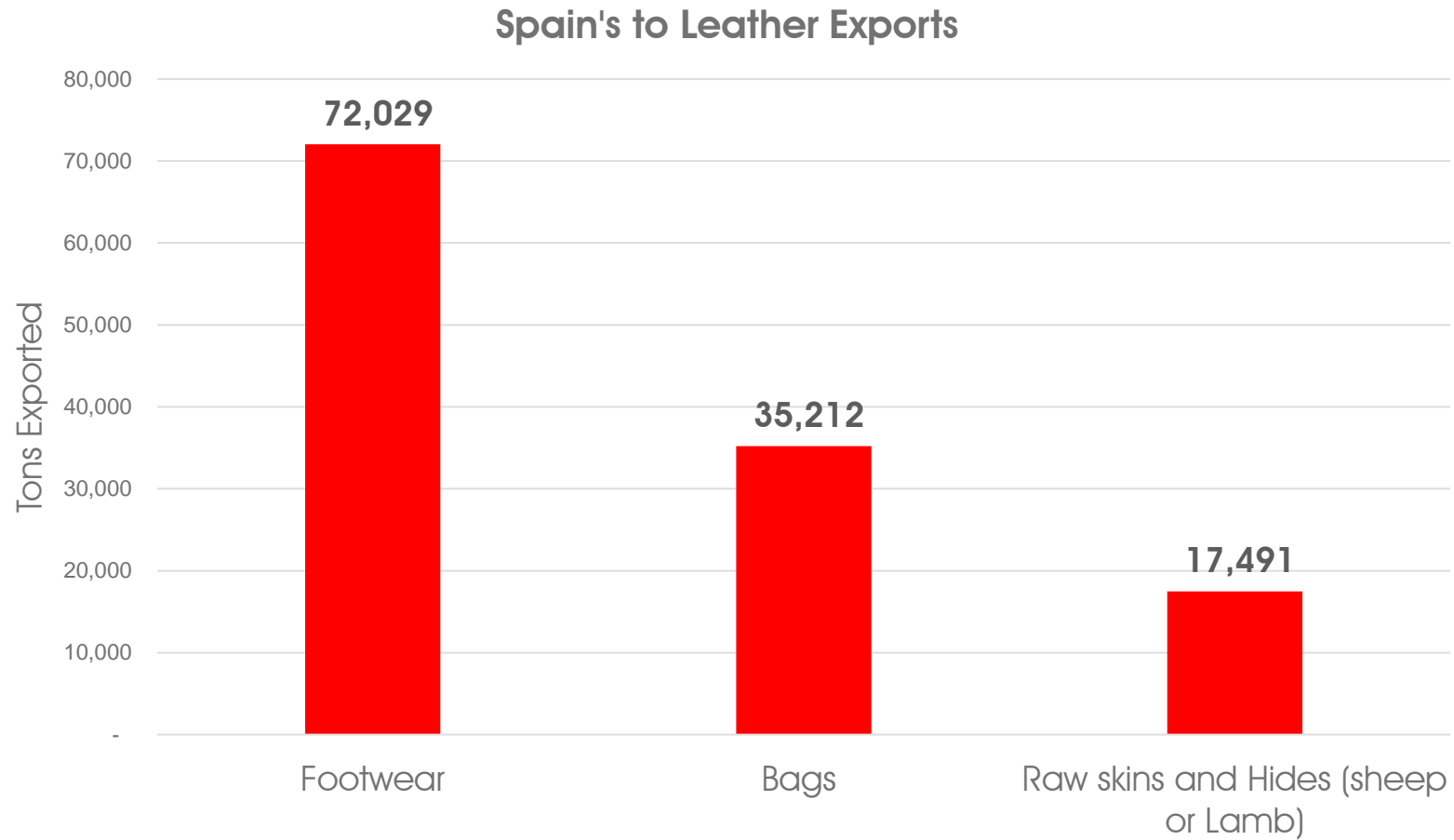


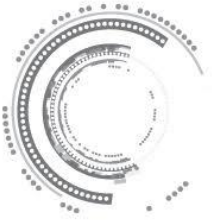
Spain

Top Matching Leather Goods Exports



Spain's top Leather Exports





Top Importers of Leather products from Spain



France
31,079
Tons Imported
from Spain



Italy
21,430
Tons Imported
from Spain



Germany
12,985
Tons Imported
from Spain



Portugal
22,949
Tons Imported
from Spain

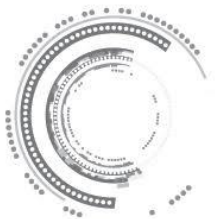


**The United states of
America**
4,510
Tons Imported
from Spain



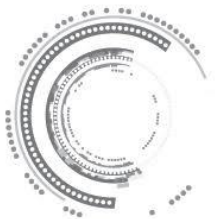
Italy

Top Matching Leather Goods Exports



Italy's top matching Leather Exports





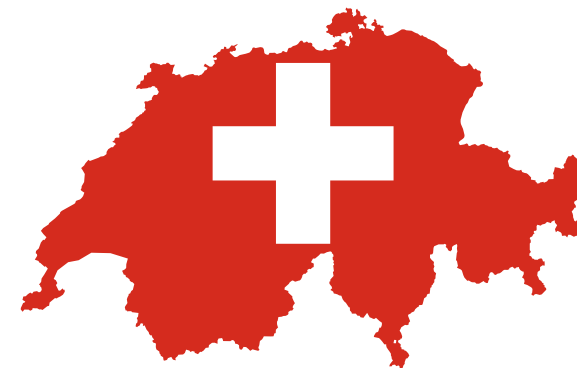
Top Importers of Leather products from Italy



France
43,455
Tons Imported
from Italy



Germany
35,168
Tons Imported
from Italy



Switzerland
22,588
Tons Imported
from Italy



**The United states of
America**
18,193
Tons Imported
from Italy

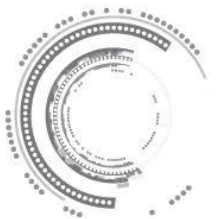


**The United
Kingdom**
14,518
Tons Imported
from Italy

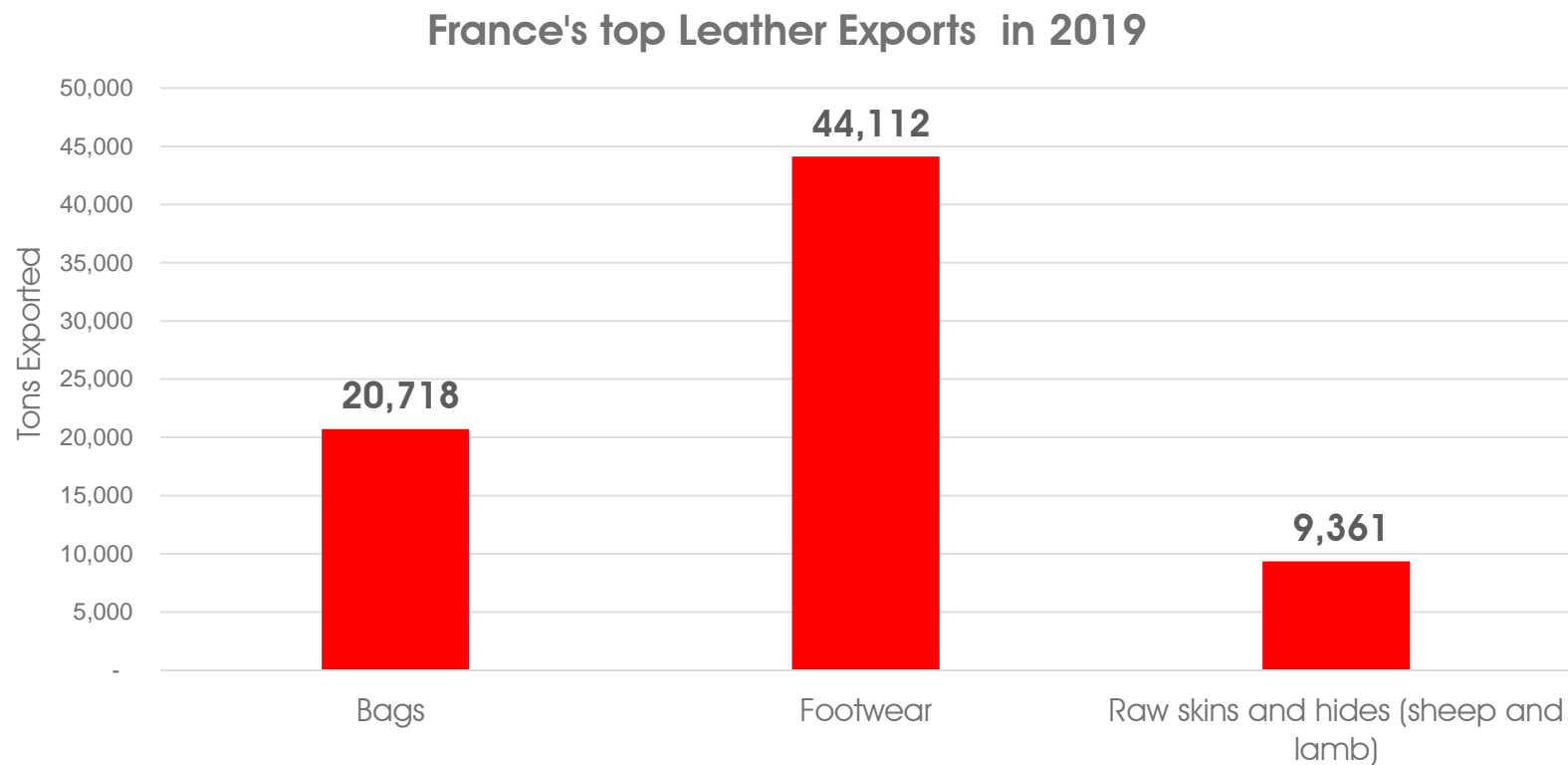


France

Top Matching Leather Goods Exports



France's top matching Leather Exports





Top Importers of Leather products from France



Italy
20,696
Tons Imported
from France



Spain
19,051
Tons Imported
from France



Germany
18,208
Tons Imported
from France

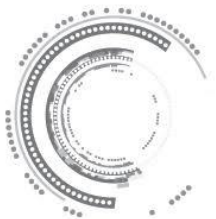


**The United
Kingdom**
12,006
Tons Imported
from France

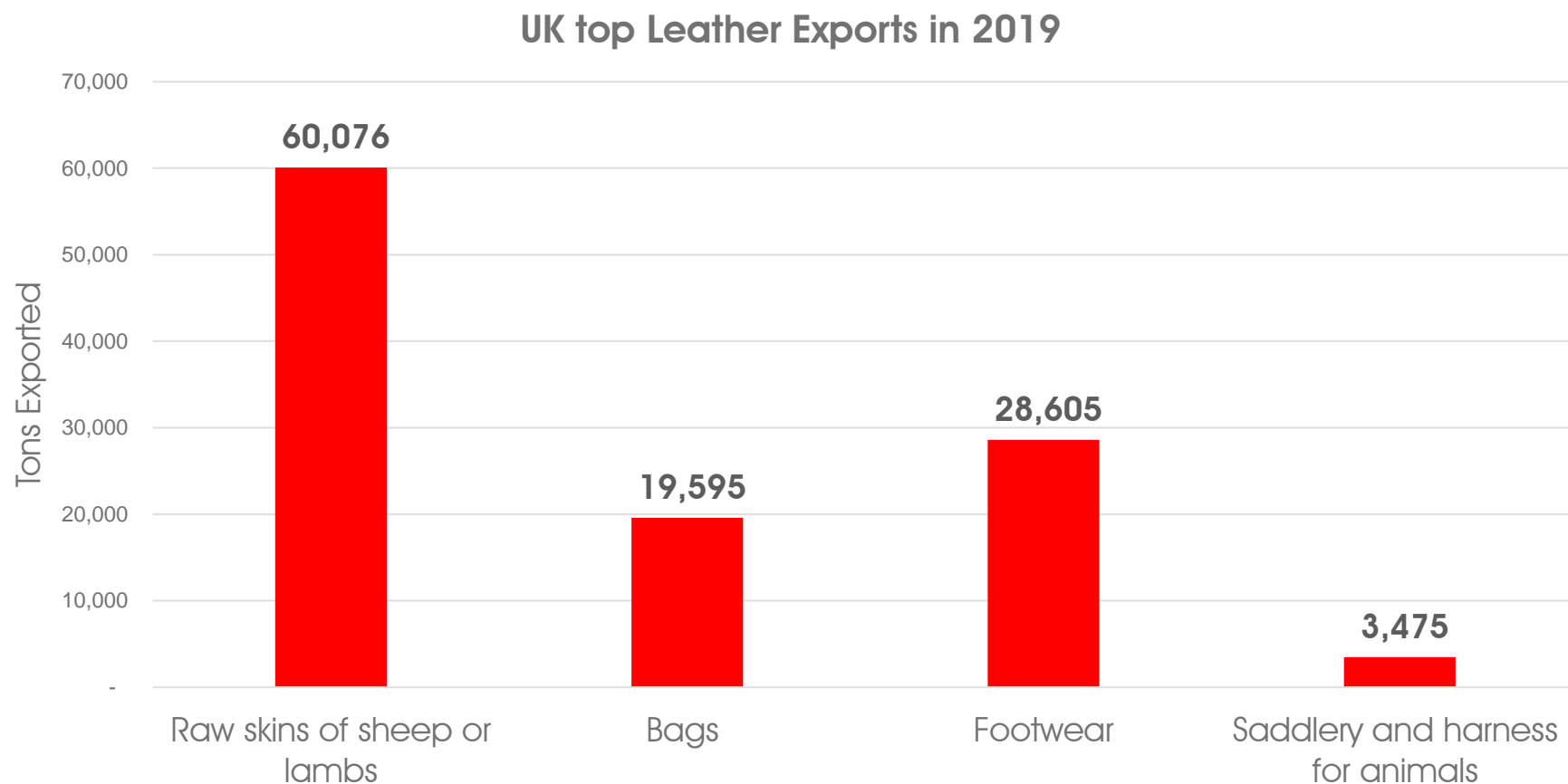


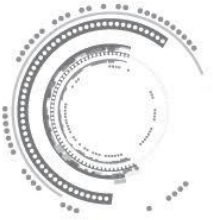
Belgium
10,547
Tons Imported
from France

The United Kingdom Top Matching Leather Goods Exports



UK's top matching Leather Exports





Top Importers of Leather products from the UK



China
40,737
Tons Imported
from
the UK



Germany
18,330
Tons Imported
from
the UK



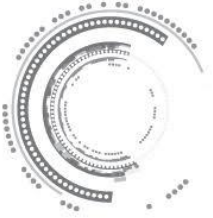
Ireland
17,614
Tons Imported
from the UK



France
11,693
Tons Imported
from the UK



Poland
6,66
Tons Imported
from
the UK



Recommendations For Leather Products

What to Export :

- Footwear
- Currently, Egypt exports 175 tons of these products (\$4 million) .

Where to Export

- Based on the markets listed in the previous slide, Egypt could target: Poland, Belgium, and Spain
- Meanwhile, Italy and the USA are already top importers of Egypt's leather footwear and can also be added to the list of target markets for increased penetration .

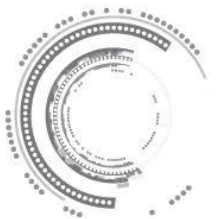
The background is a solid red color with abstract, curved, concentric lines and dots in a slightly darker shade of red, creating a sense of motion or a stylized gear-like pattern.

Creative Industries

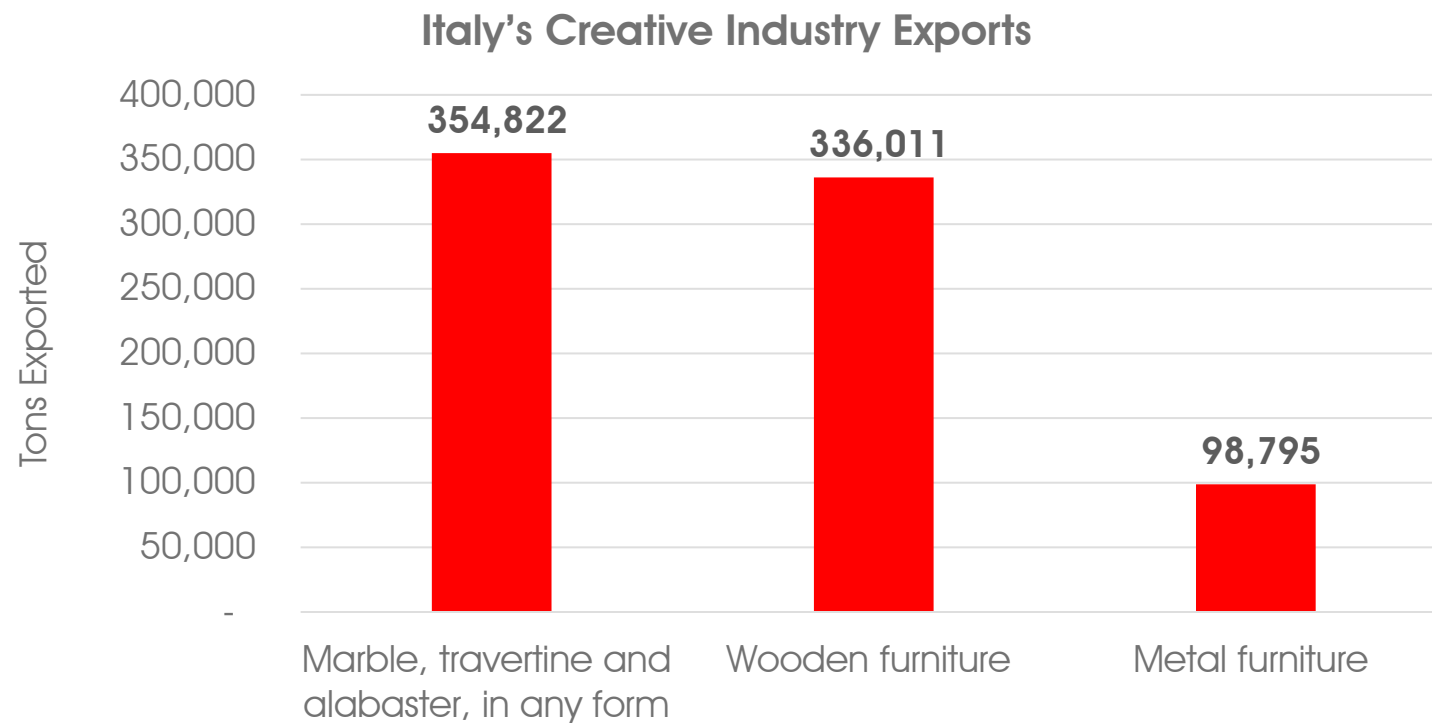


Italy

Top matching Creative Industry exports



Italy's top Creative Industry Exports





Top importers of Creative Industry products from Italy



France
432,620
Tons Imported
from Italy



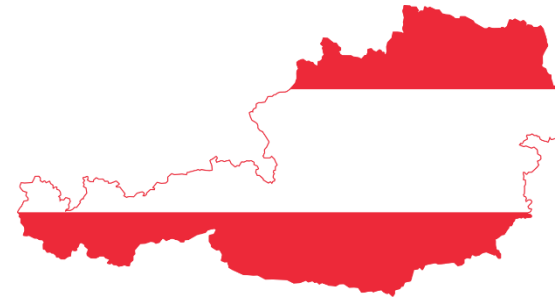
Germany
290,627
Tons Imported
from Italy



The United Kingdom
114,741
Tons Imported
from Italy



Spain
81,957
Tons Imported
from Italy

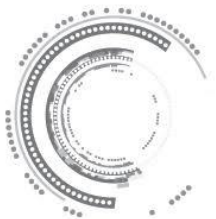


Austria
51,625
Tons Imported
from Italy

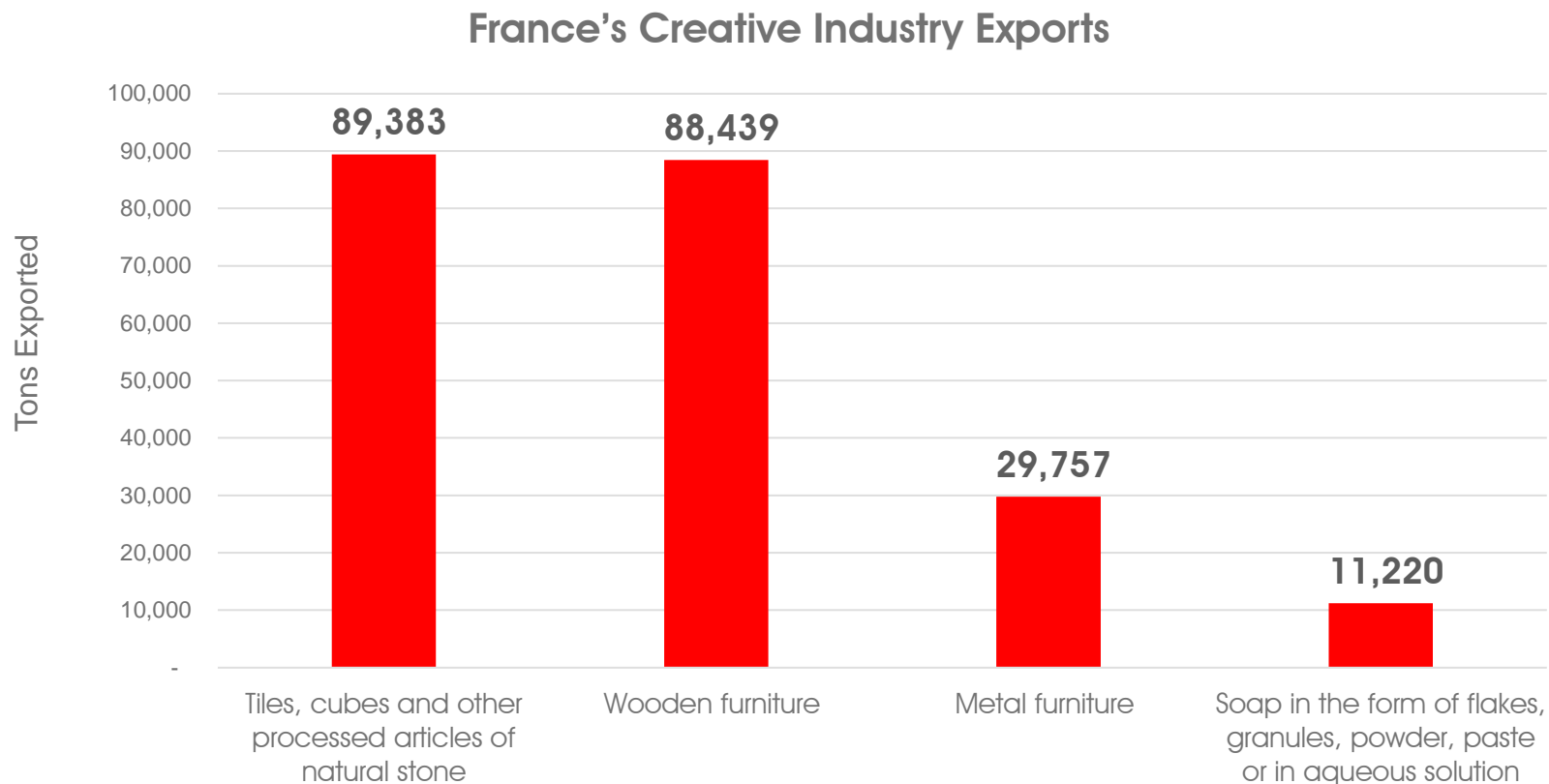


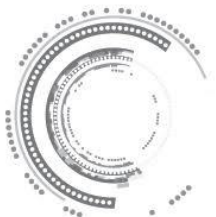
France

Top matching Creative Industry exports



France's top Creative Industry Exports

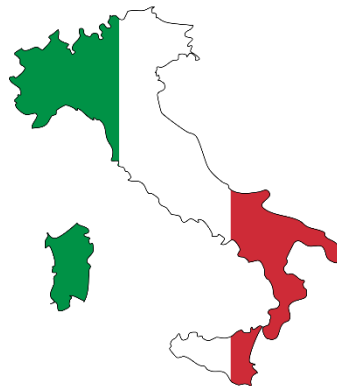




Top Importers of Creative Industry products from France



Germany
347,206
Tons Imported
from France



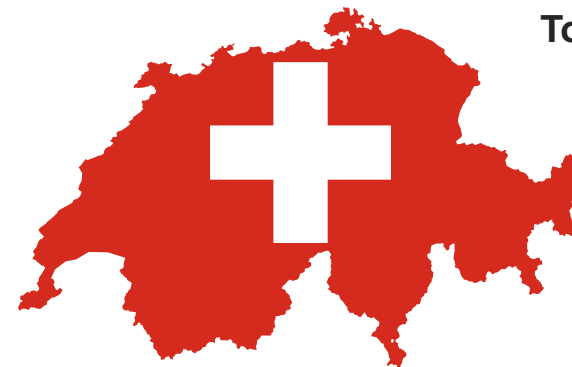
Italy
198,697
Tons Imported
from France



Belgium
147,277
Tons Imported
from France



Spain
124,582
Tons Imported
from France

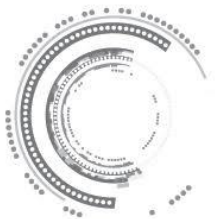


Switzerland
102,634
Tons Imported
from France

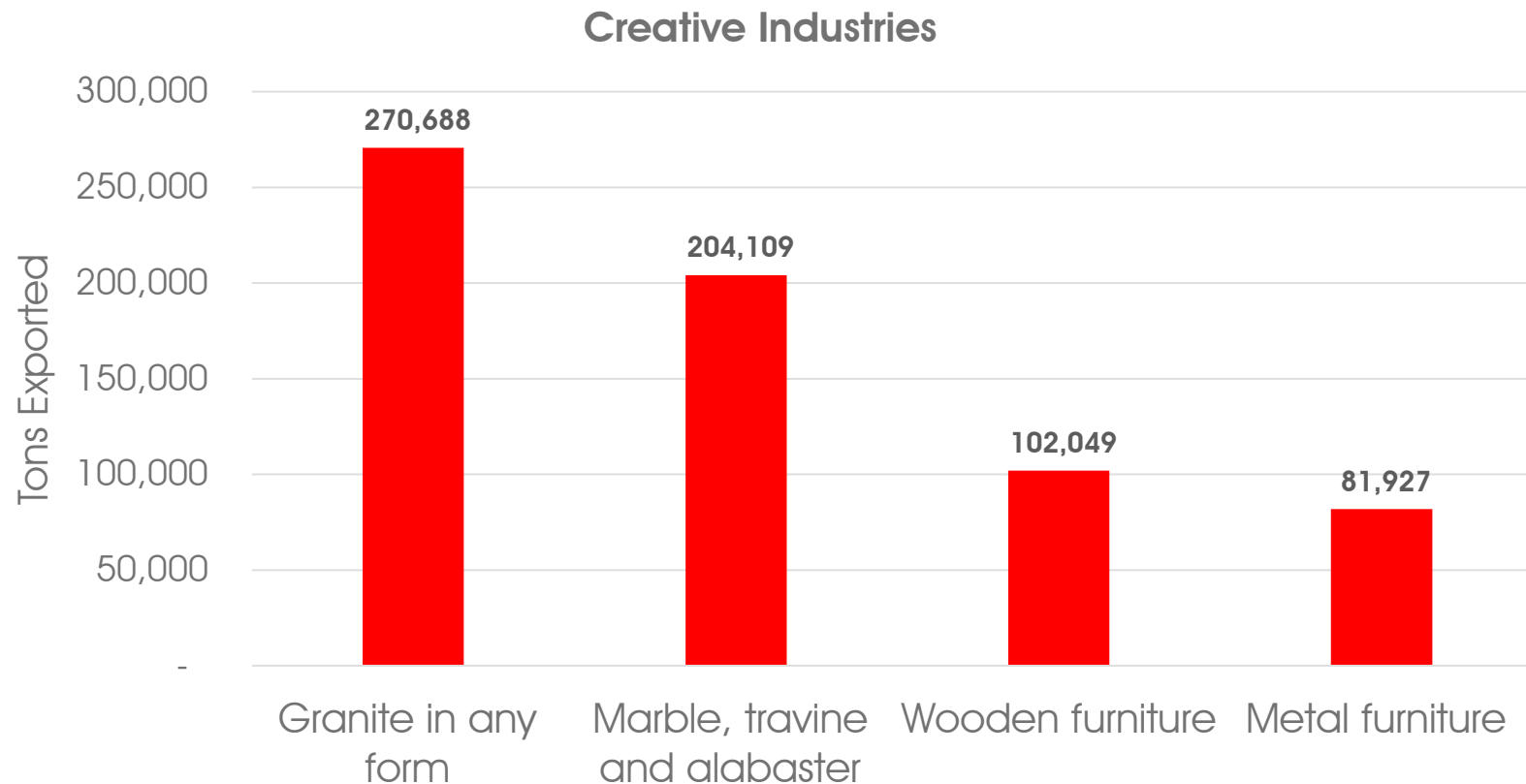


Spain

Top matching Creative Industries exports



Spain's top Creative Industry Exports





Top Importers of Creative Industry products from Spain



France
\$1.85 Billion
in Imports from
Spain



Portugal
\$7.43 Million
in Imports from
Spain



**United States of
America**
\$7.37 Million
in Imports from
Spain



United Kingdom
\$6.73 Million
in Imports from
Spain



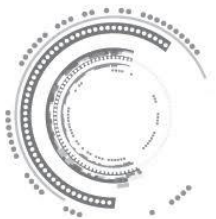
Germany
\$6.67 Million
in Imports from
Spain

* Values were used here, as data regarding imported volumes was incomplete

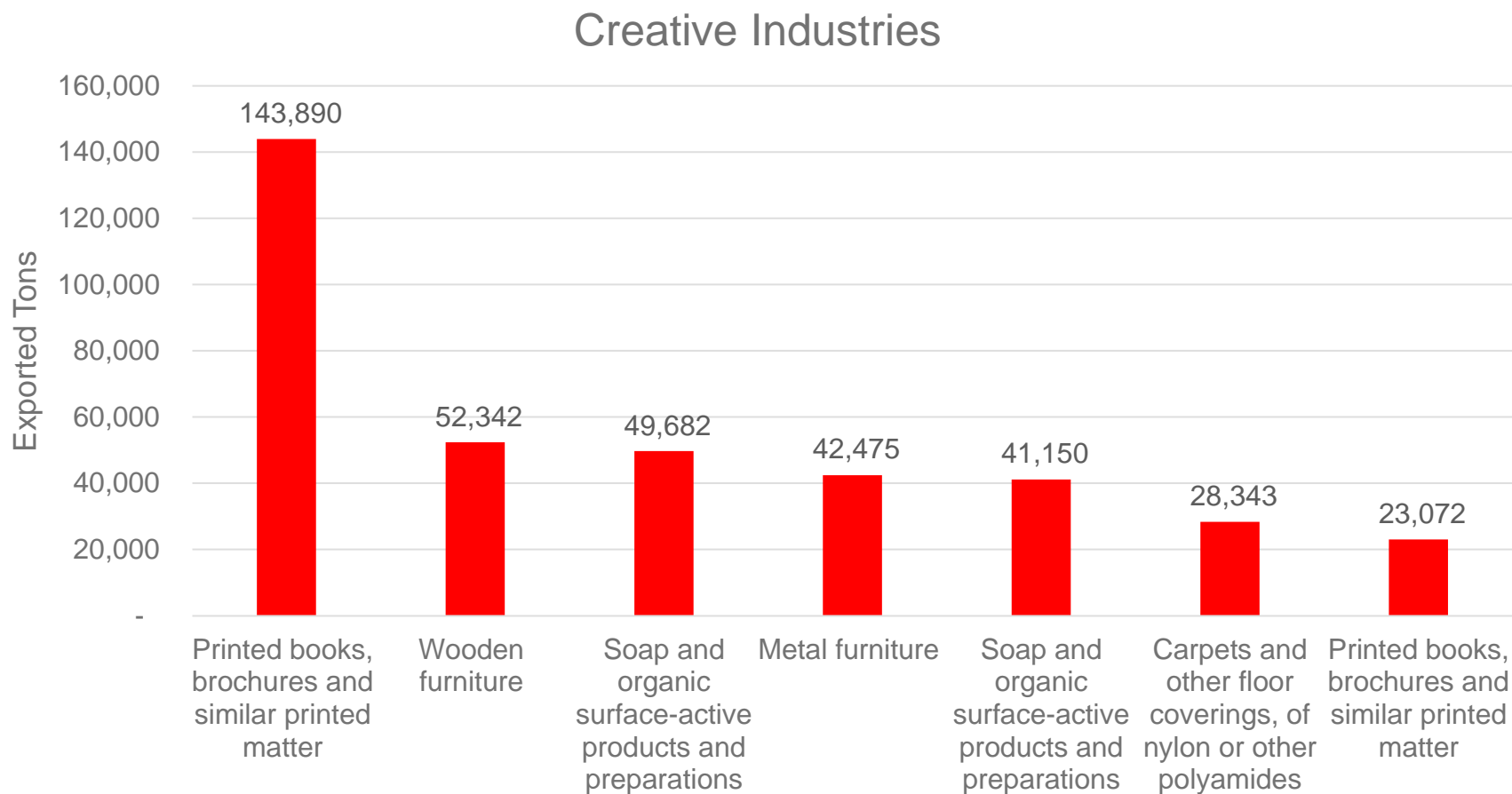


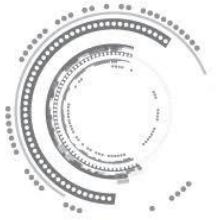
The United Kingdom

Top matching Creative Industry exports



UK's top Creative Industry Exports





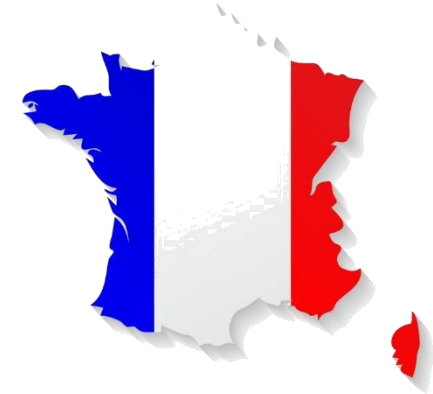
Top Importers of Creative Industry products from the UK



Ireland
195,039
Tons Imported
from the UK



Germany
179,529
Tons Imported
from
the UK



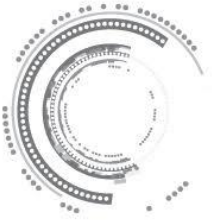
France
85,482
Tons Imported
from the UK



Netherlands
64,344
Tons Imported
from
the UK



Poland
24,334
Tons Imported
from
the UK



Recommendations For Creative Industry Products

What to Export :

- Wooden furniture (excluding for offices, kitchens and bedrooms, and seats)
- Soap; organic surface-active products and preparations for use as soap, in the form of bars, moulded pieces or shapes, whether or not containing soap; for washing the skin, in the form of liquid or cream and put up for retail sale

Egypt currently exports 54,522 tons of wooden furniture(\$2.6 Million), and 7,859 tons of soaps (\$19.9 million)

Where to Export:

- Based on the markets listed in the previous slide, Egypt could target: Spain, Italy, Germany, Belgium, and Poland.

THANKS!



Do you have any questions?

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