



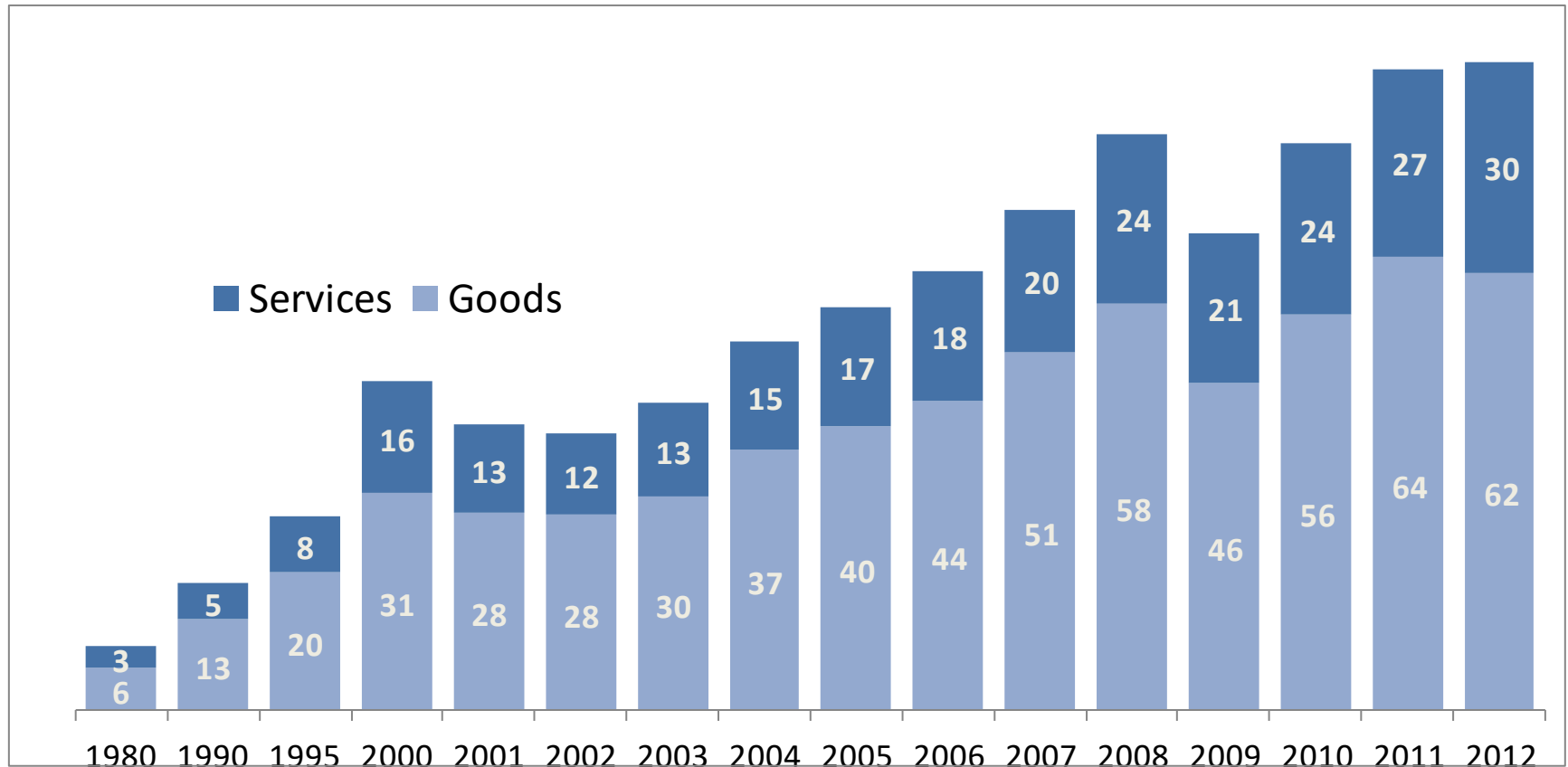
Manufacturers' Association of Israel

Winner, "2008 Israel Prize"

The Backbone and Voice of Industry

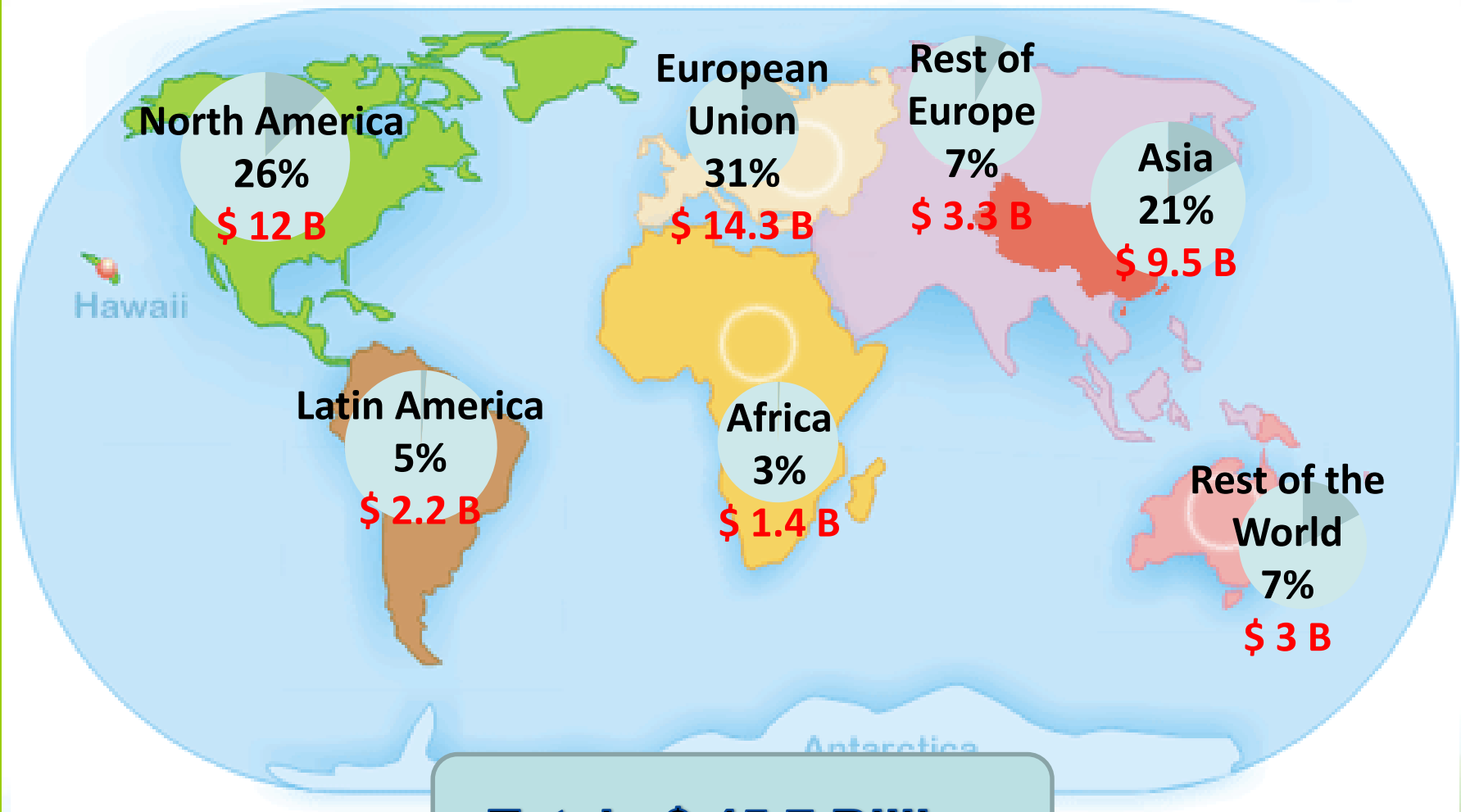
**Addressing Trade Vulnerability:
Israel's Dependence on Too Few Exporters
Herzliya Conference 2013**

Israeli Export 1980-2012



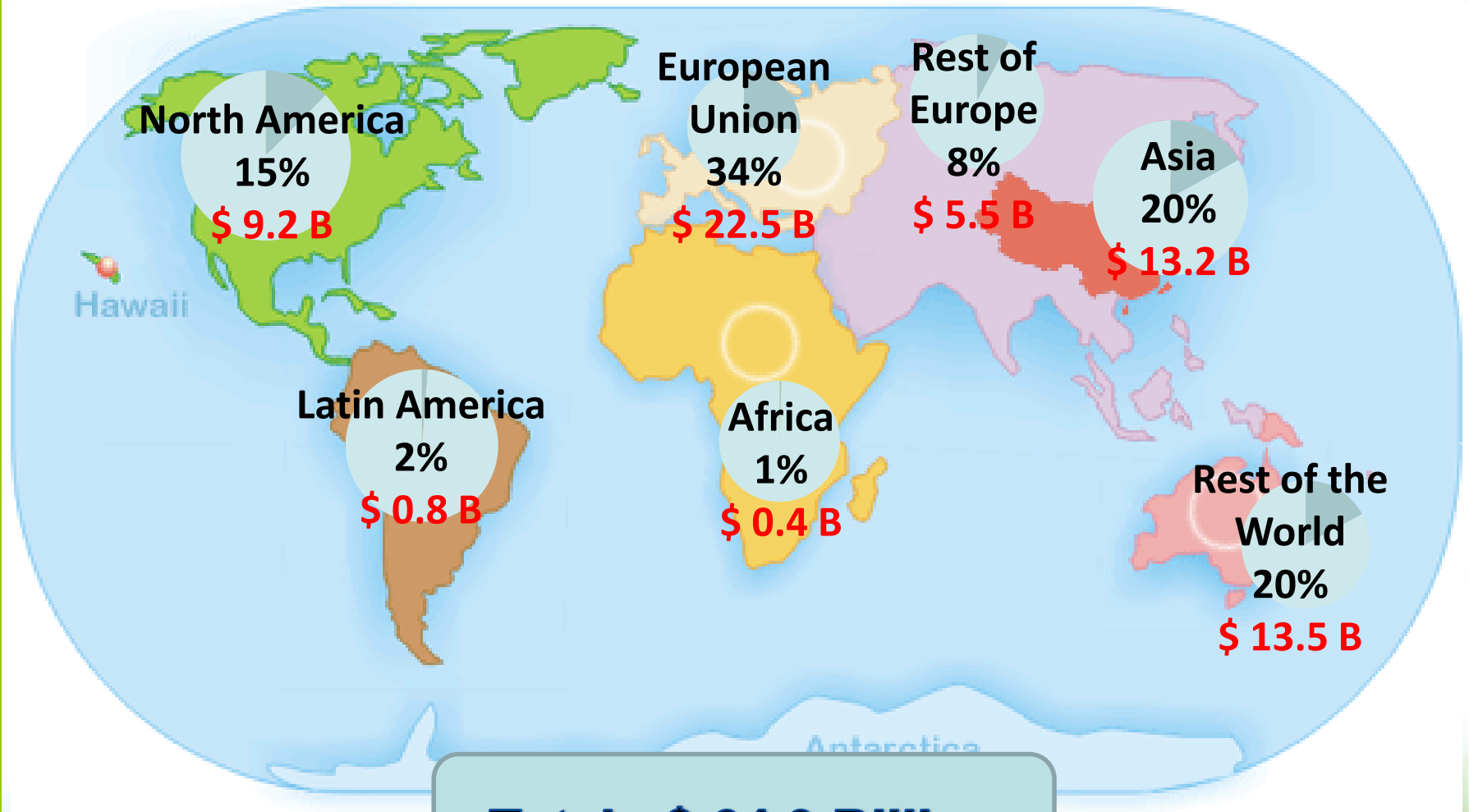
Source: CBS

Israeli Commodity Export by Continent 2012 (excl. diamonds)



Source: CBS

Commodity Import by Continent 2012 (excl. diamonds)

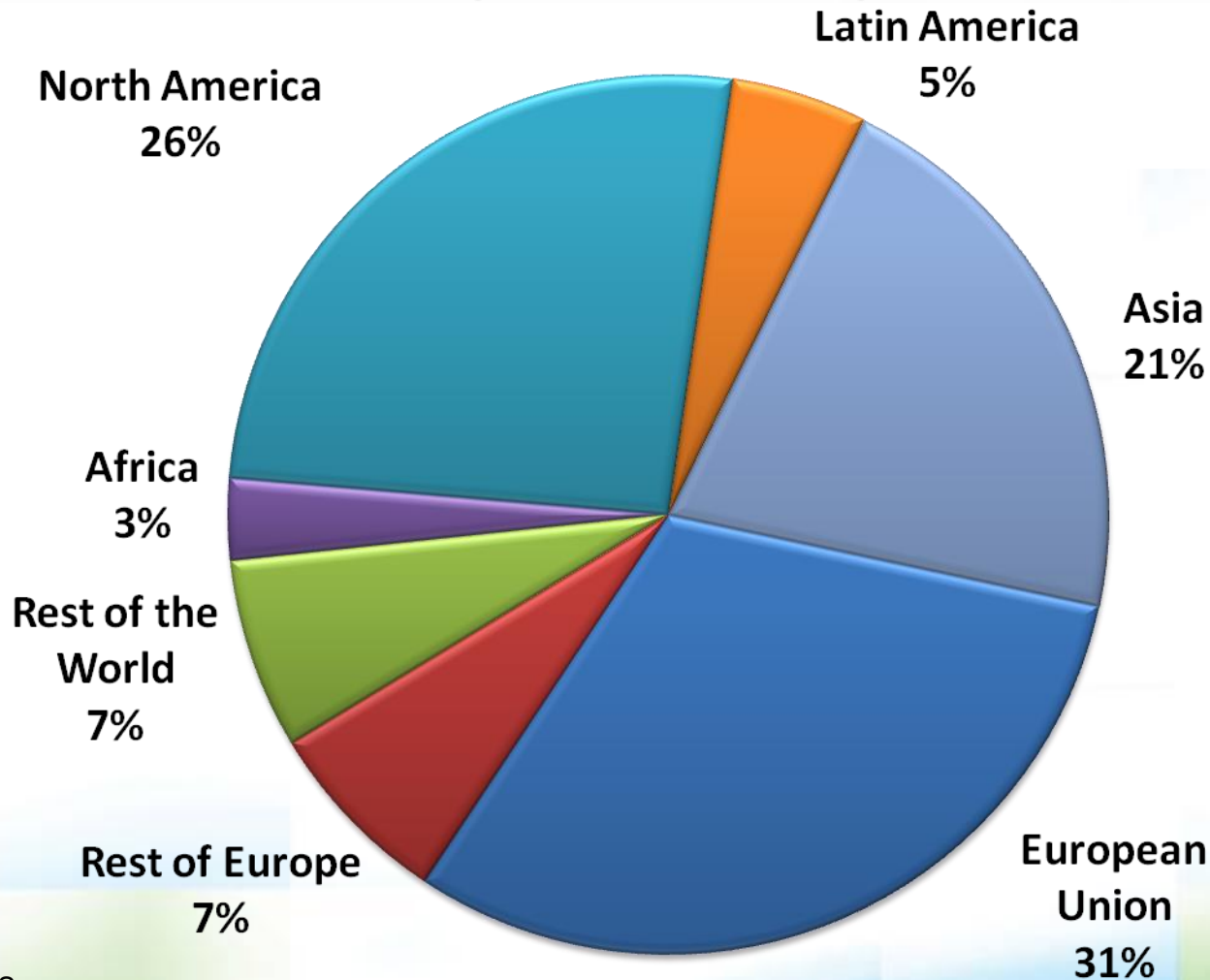


Total : \$ 64.9 Billion

Source: CBS

Israeli Commodity Export by Continent 2012

(excl. diamonds)



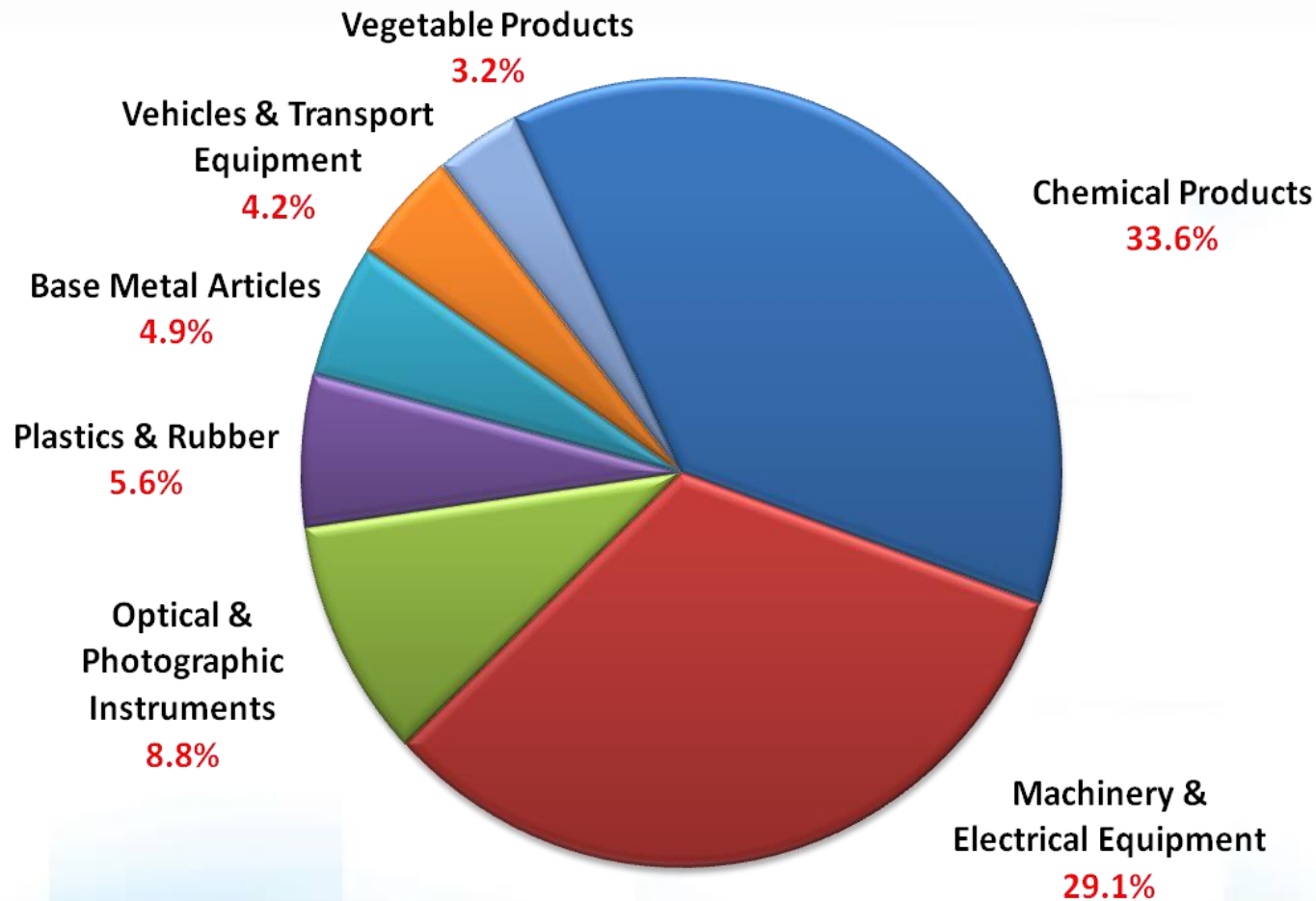
Source: CBS

Total : \$ 45.7 Billions



Israeli Export by Commodities 2012

(excl. diamonds)

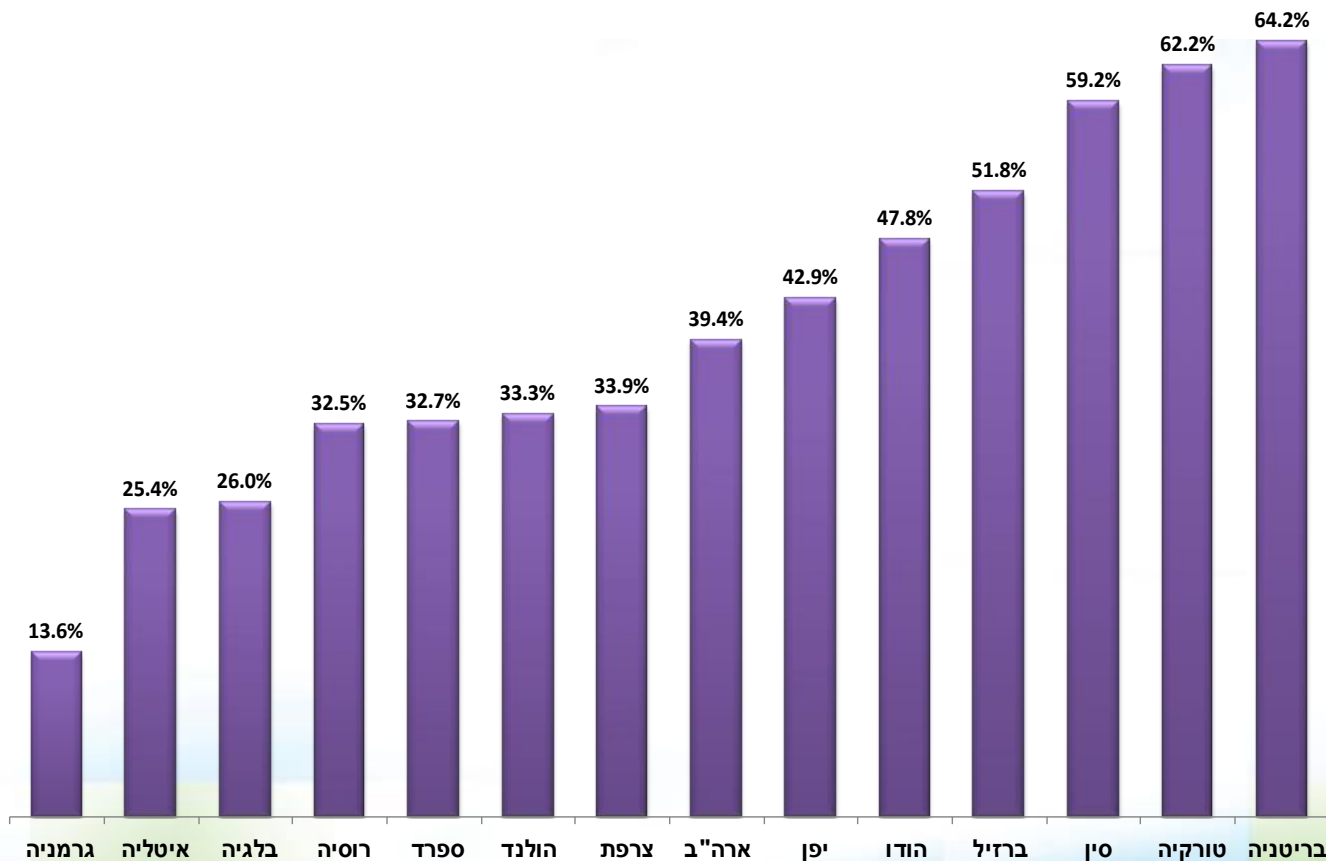


Total : \$ 45.7 Billion

Source: CBS

Share of Top 5 Exported Products

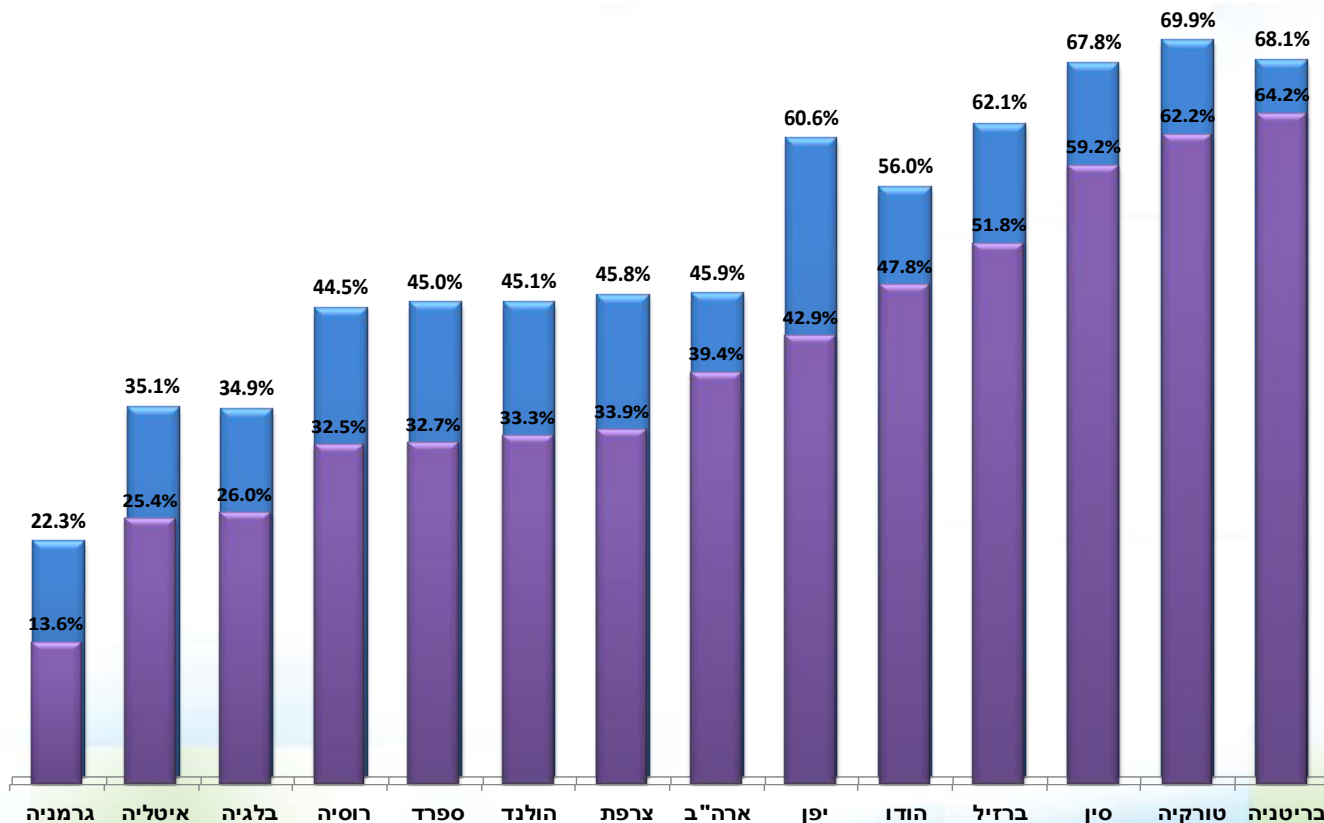
Leading Export Destinations from Israel



Source: MAI

Share of Top 10 Exported Products

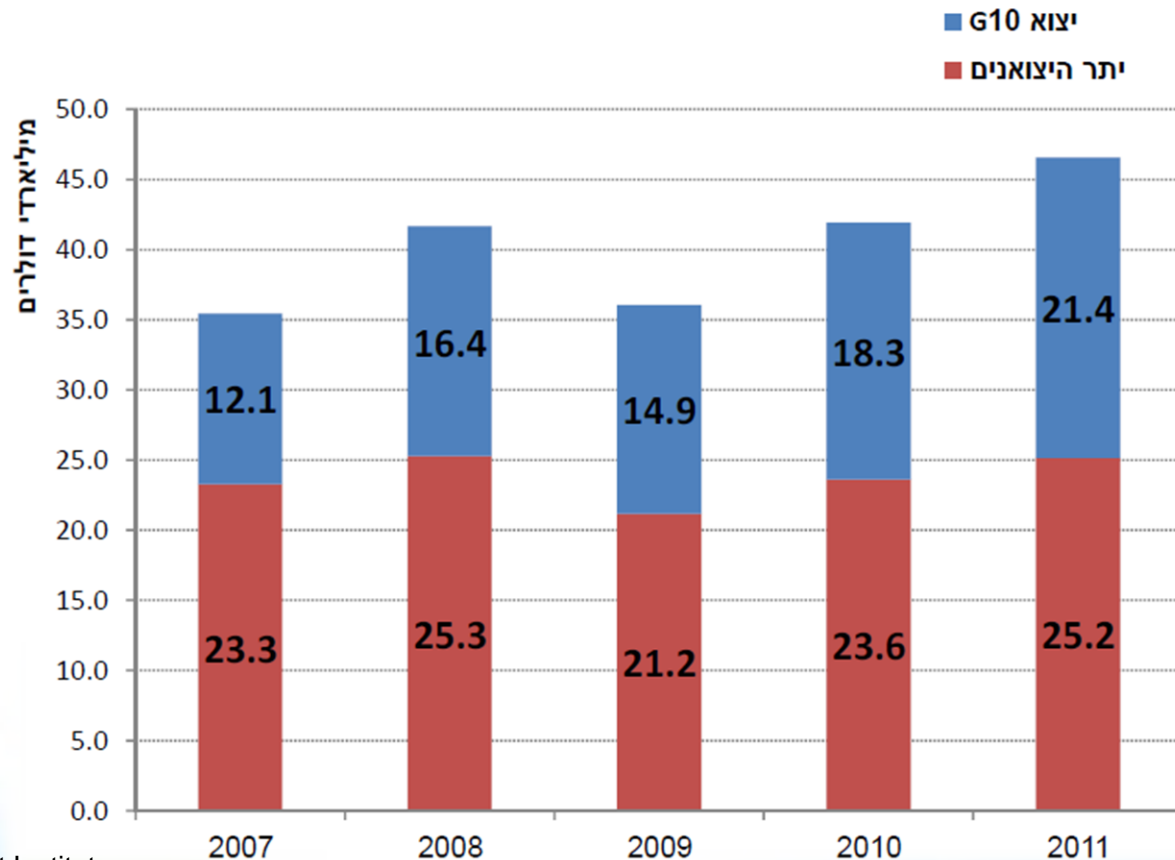
Leading Export Destinations from Israel



Source: MAI

Share of Top 10 Exporters Vs. Others

יצוא G10 לעומת כל יתר היצואנים, 2007-2011
מקורי, במיליארדי דולרים

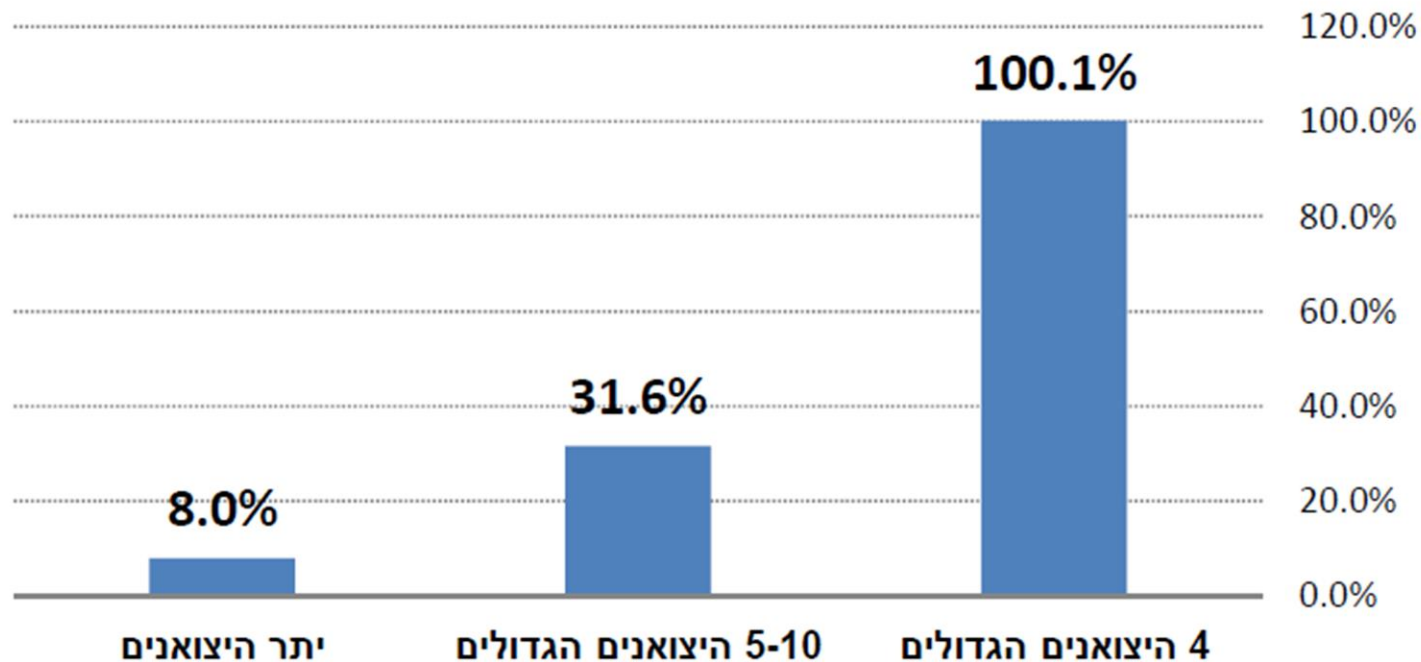


Source: Export Institute

Top 10 Exporters Contribution to Export Growth

הגידול בהיקפי היצוא: 4 הגדולים, 5-10 הגדולים לעומת כל יתר היצואנים
שינוי באחוזים

■ הגידול ביצוא משנת 2007 ועד 2011



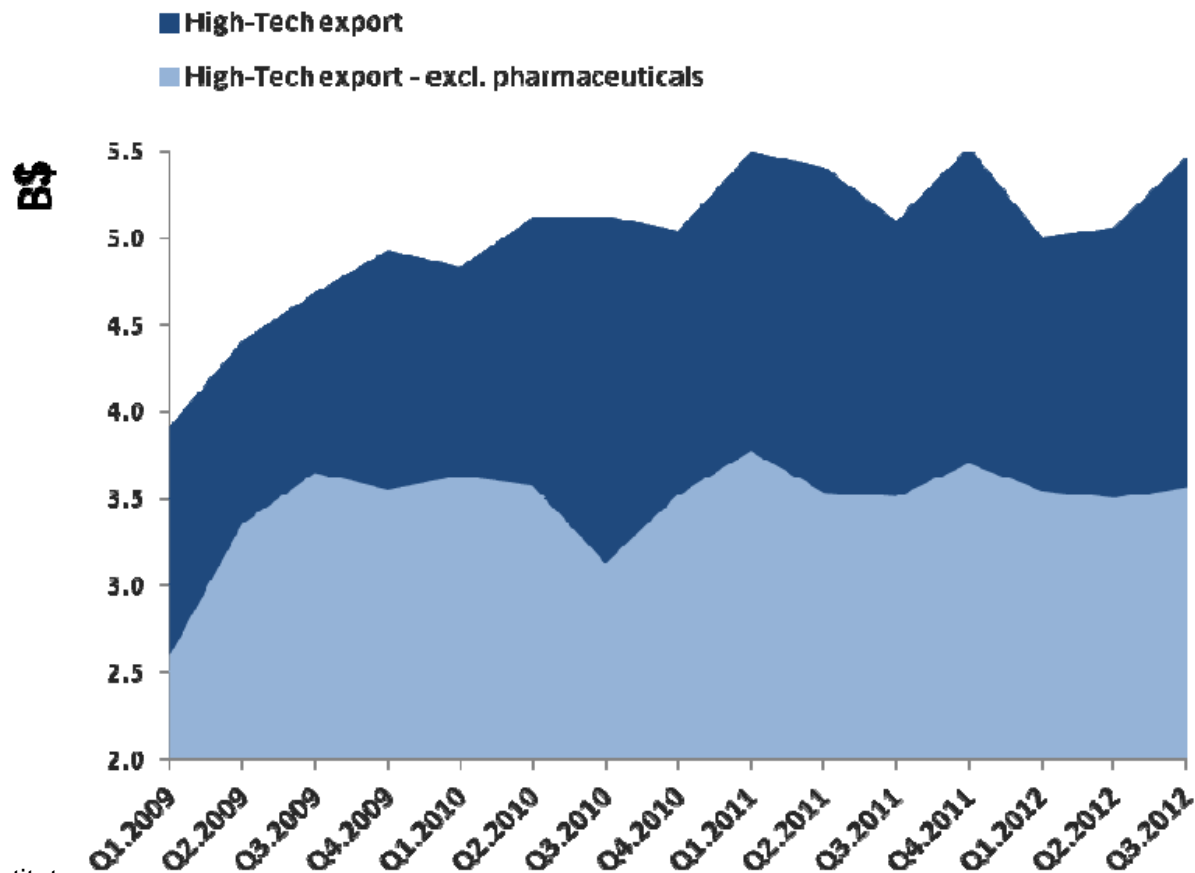
Source: Export Institute

The Centralized Export Entrapment

A Misleading Picture

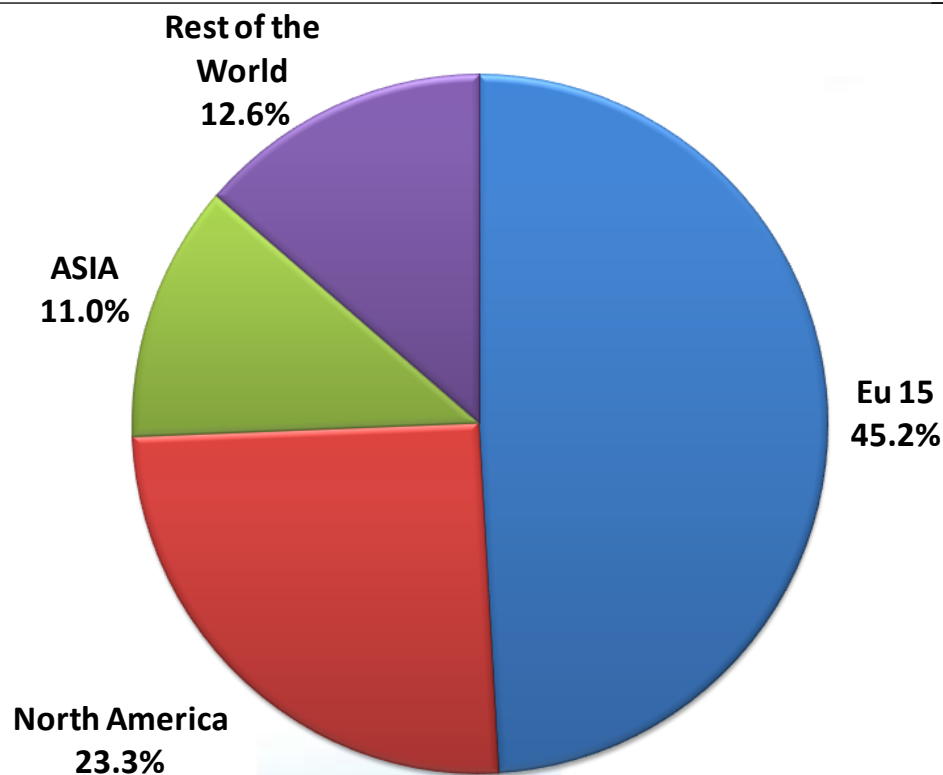
Exports of high tech industries including and excluding pharmaceuticals

Change in export volumes – seasonally-adjusted data, \$ billion

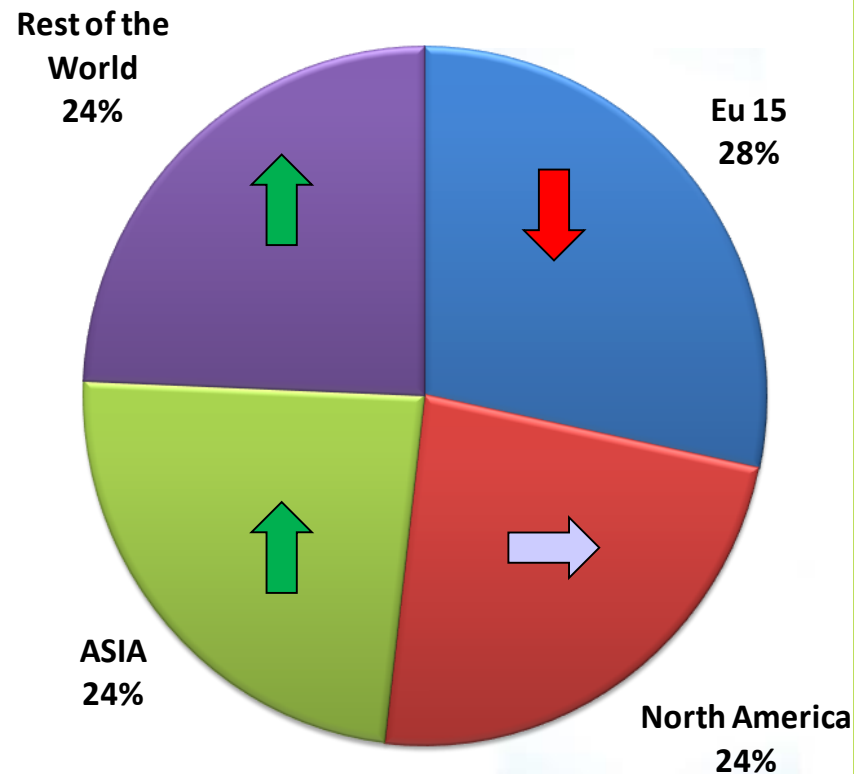


Source: Export Institute

Israel's Foreign Trade (Export + Import) by Trading Blocks 1988 vs. 2010



1988

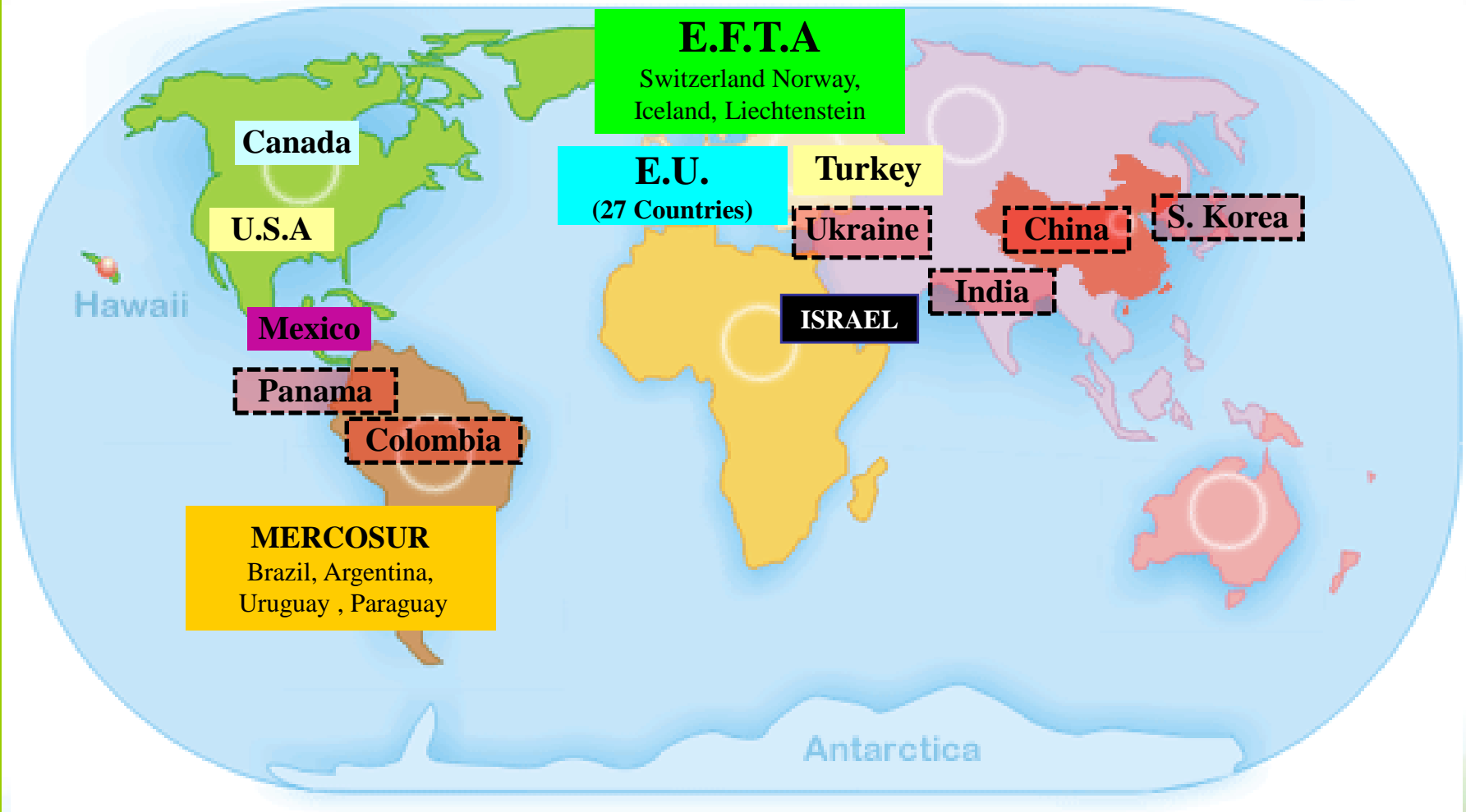


2010

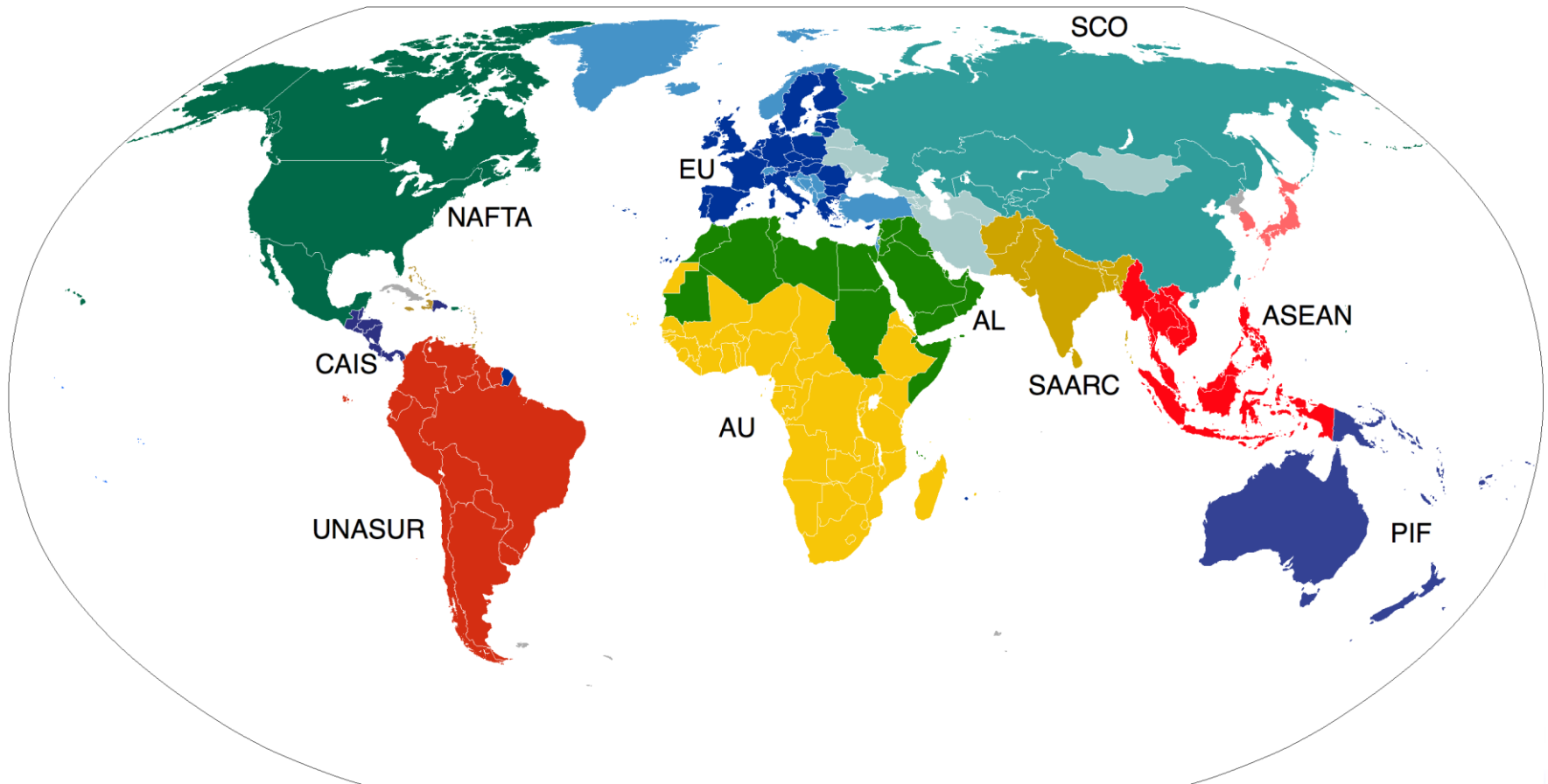
Source: CBS

7 Free Trade Agreements with 39 countries

Allowing products to enter without duty



Major Free Trade Areas Worldwide



Major Free Trade Areas Worldwide

Recently Signed FTAs

2008-2009

2010-2011

2012



2009



2011



Belarus



Kazakhstan



Serbia

Montenegro



2010



2010



2012



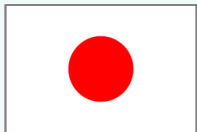
2012



Colombia



Panama



ASEAN: Indonesia, Vietnam, Thailand, Malaysia & Philippines



MERCOSUR: Brazil, Argentina, Uruguay, Venezuela & Paraguay



Major Free Trade Areas Worldwide

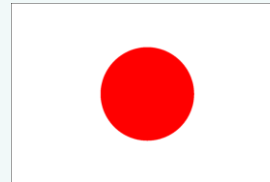
FTA Negotiations Underway



since 2005



since 2009



2012



since 2009

since 2007



since 2013



since 2013



since 2013

Conclusions & Recommendations:

1. חתימה על הסכמי-סחר נוספים וצמצום הפערים בשווקים המתעוררים
2. צמצום התלות ביצואנים הגדולים ובחברות הרב-לאומיות
3. סיוע אפקטיבי ליצואנים קטנים ובינוניים
4. שיפור כלי הסיוע הממשלתיים והתאמתם לצרכים המשתנים
5. הרחבת והתאמת הקרן לעידוד השיווק לחו"ל ליצואנים הקטנים

Thank you

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