

Markets, power, and potatoes:

An analysis of agricultural trade between Egypt and Europe



Issue brief No.2 of a series examining agricultural trade between the EU and North Africa in times of crisis.

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Introduction

Despite its large agricultural sector, Egypt is one of the world's most food-insecure countries. It relies heavily on imported grain, particularly wheat, whose global prices fluctuate wildly. Climate change poses a significant threat to agriculture, especially small-scale farming in Egypt and throughout the North African region. Increasing droughts and high temperatures between 1998 and 2011 have served to accelerate the rate of desertification and soil degradation, triggering a series of local and regional water crises.¹ According to national poverty indicators, those employed in agriculture and living in rural areas have amongst the highest poverty rates. Hence, farmers face significant challenges in sustaining their livelihoods.²

The ongoing economic crisis post 2016 and increasing poverty rates have made it harder for the country to improve nutrition, particularly among children. The prevailing neoliberal model for agricultural and food policies in Egypt has made the task more difficult, as policies are often inconsistent and disconnected, prioritising profits and short-term solutions over establishing a sustainable agriculture and food system. This neoliberal model characterises in particular Egypt's agri-food trade policy. Its main features include:

- an agriculture-for-export policy furnished by financial incentives through the Export Development Fund and close ties between agribusiness interests, large agri-food traders, and government agencies;
- the promotion of large-scale farming by reclaiming desert land and facilitating agricultural investors' access to large areas of land and to water resources;
- a shift in policy focus from food self-sufficiency to food security, prioritising food imports over domestic production.

This policy orientation promotes an agricultural production pattern that is highly dependent on imported inputs, leading farmers to rely increasingly on large agricultural companies for essential inputs such as seeds, fertilisers and pest and disease control products. This reduces the value that farmers can derive from food markets and agricultural value chains as well as having negative impacts on the environment. In addition, this export focus has led to a chronic trade deficit with Europe and difficulties in covering Egypt's food import bill as the value of fruit and vegetable exports has not been sufficient to cover the cost of grains and other key food imports.

This report analyses the various trade agreements into which Egypt has entered, with a focus on the agricultural sector and on the relationship with the European Union (EU). In conducting this analysis, the impact of these agricultural trading relationships on levels of food insecurity, poverty and sustainable development are assessed. An in-depth examination of the potato value chain – one of Egypt's main export crops – is used to unpack some of these linkages and impacts in further detail.

The Egyptian food and agricultural system at a glance

More than half (57%) of Egyptians live in rural areas.³ The agricultural sector plays a vital role in Egypt's economy, accounting for approximately 12.1% of the gross domestic product (GDP) and employing over 20% of the total labour force.⁴ However, as will be discussed, the agricultural sector in Egypt comprises two distinct systems: family and small-scale farming, which cover approximately 60–65% of domestic food requirements, and large farms, which

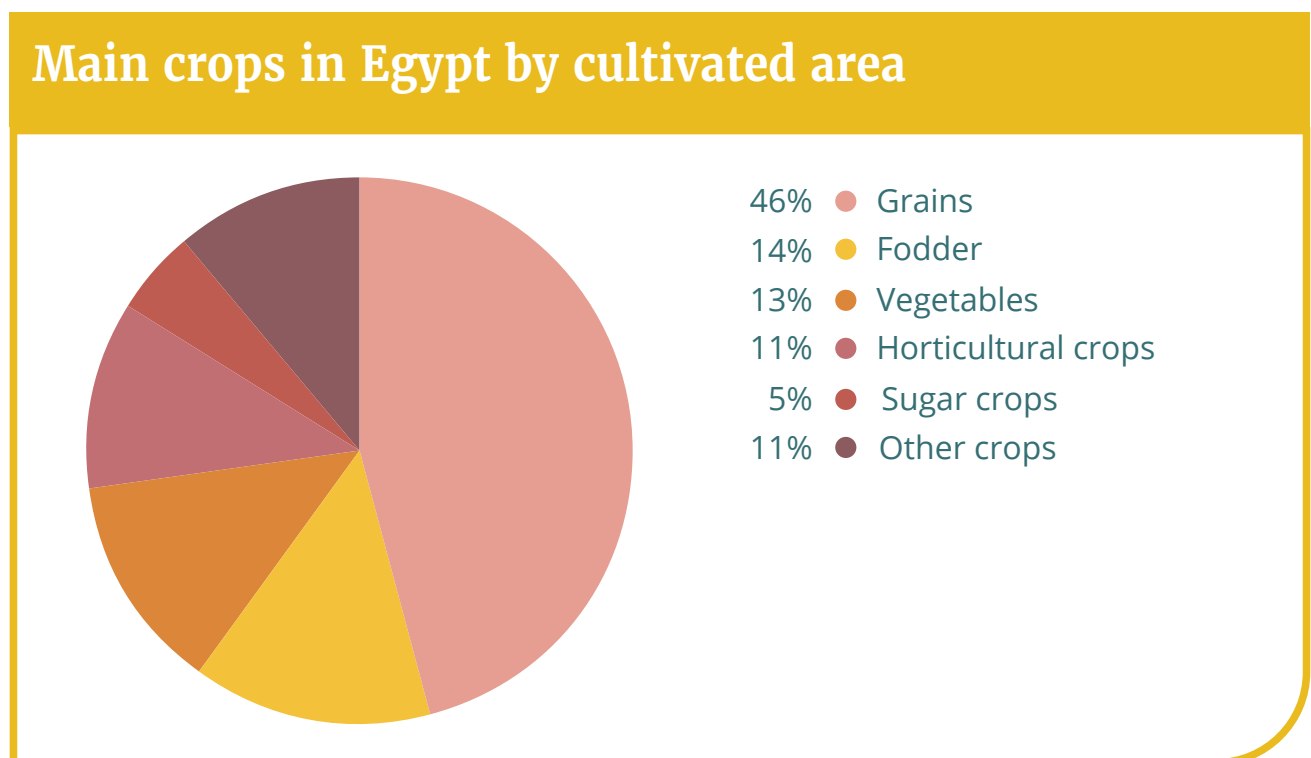
meet the remaining needs although most of their output is for export. The following section outlines some of the main features of Egypt's food and agricultural system, in terms of the main crops cultivated, patterns of land use and distribution, water resources, the agricultural workforce, the role of farm subsidies and agricultural support policies, and the value of agricultural exports.

Main crops

Grains constitute the main crops in Egypt in terms of cultivated land area, followed by fodder crops and vegetables.

Figure 1 gives an overview of the main crops in Egypt and their share of cultivated land.

FIGURE 1:



Source: '2021–2022 Sustainable Development Plan'. Cairo: Government of Egypt.

Wheat cultivation covers more than 3 million feddans (1.26 million ha). However, despite significant success in terms of increasing yields, seed engineering, the development of local strains, and the advancement of new agricultural

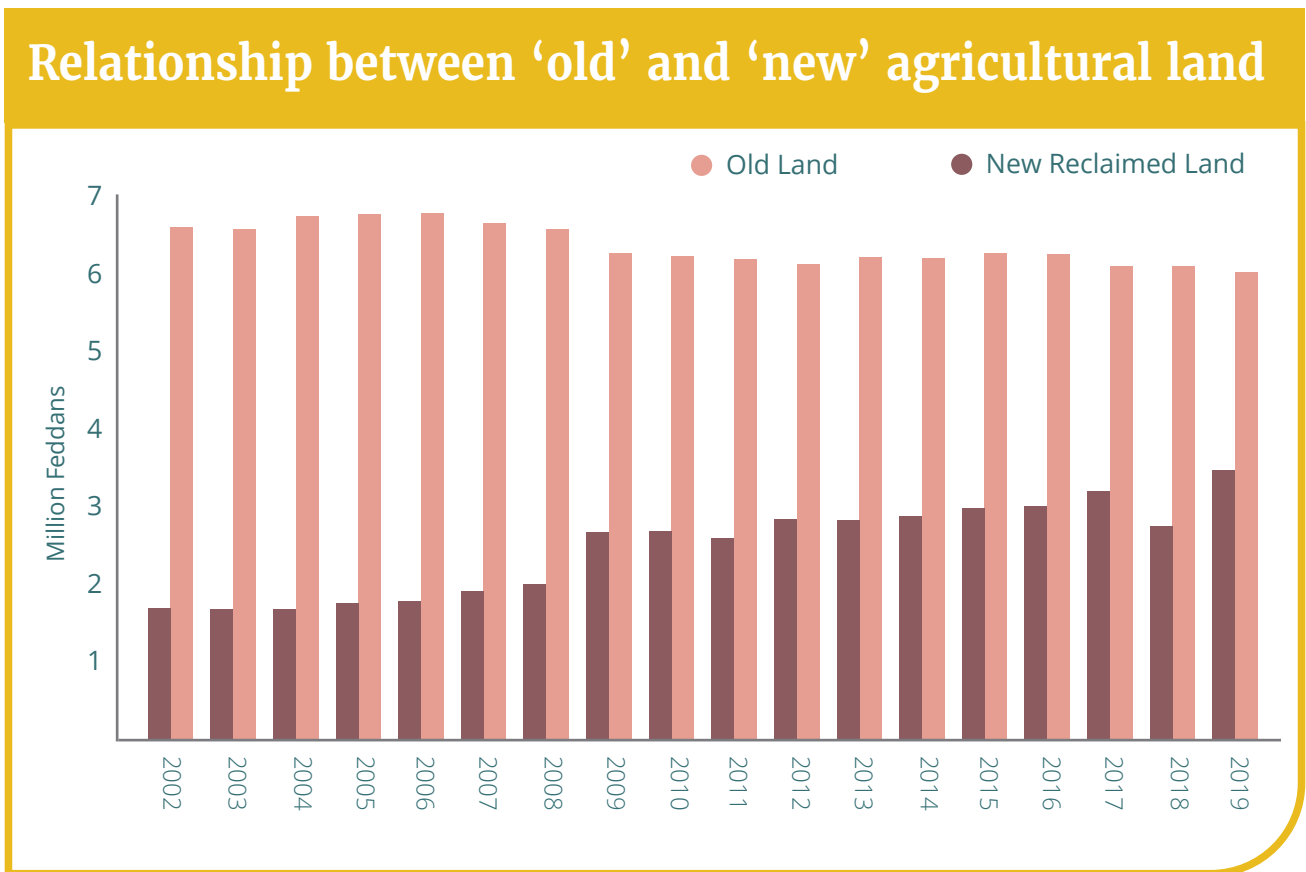
techniques, Egypt has not achieved self-sufficiency in wheat production and continues to be the world's largest importer of wheat.

Land

The agricultural sector in Egypt is comprised of two distinct systems: first, the so-called 'old lands', located in the Nile Valley and Delta, which rely on small-scale farming due to the fragmentation of land and ownership, and second, the 'new lands' that comprise large export-oriented farms controlled by agricultural investment companies. This pronounced distinction between traditional, small-scale farming and modern, capital-intensive agriculture came as a result of land-reclamation processes that began during the British occupation in the early twentieth century and were continued by the Egyptian government from the 1940s onwards under the rubric of so-called 'Green Revolution' agricultural reforms.

Initially, Egypt's Green Revolution involved reclaiming large areas of land and distributing them to small farmers under usufruct or direct ownership agreements. However, following IMF and World Bank imposed economic reforms in the 1980s, including structural adjustment programmes (SAPs), there was a shift towards larger scale, export-oriented agriculture controlled by major companies and investors. Figure 2 depicts the rise in the use of reclaimed agricultural land in Egypt from 2002 to 2019, providing insight into how the structure of agricultural land has taken shape in Egypt in recent times.

FIGURE 2:



Source: CAPMAS, Egypt, Land reclamation bulletin.

In addition to this ongoing land reclamation process, a significant amount (202,000 ha over the last 20 years) of the old agricultural lands have been 'lost' as a result of

unregulated urban sprawl – a consequence of the government's failed housing policies.

Water

Small-scale and family farming in Egypt heavily relies on water from the Nile, making it a sensitive issue for most farmers, particularly those in the Northern Delta. Agriculture accounts for approximately 85% of Egypt's allocation of Nile water, and despite their vital role in the country's food supply chain, Egyptian farmers are frequently criticised by the government and urbanites for their intensive use of irrigation water.⁵ In recent years, the government has taken measures to compel farmers to reduce their water consumption, such as prohibiting the cultivation of staple crops like rice, reducing the amount of water in irrigation channels, and undertaking projects to enhance field irrigation.

Before the COVID-19 pandemic, the government had contemplated a project to line the country's canals to minimise the loss of river water that seeps into the groundwater. Since the project had disregarded environmental factors such as pollution and evaporation rates, the government partly abandoned it and conducted individual feasibility studies to assess whether canals should be lined.⁶ Major projects, including canal lining or coverage, seldom involve farmers in discussions or consider the impact on their livelihoods.

Excluding peasant farmers from discussions about water amounts to a form of discrimination. One such example is the law aimed at reducing rice cultivation in the North Delta which was introduced to address water scarcity, but excluded thousands of farmers in the region who rely on rice as a crucial economic resource from consultation. This legislation disregarded several economic and environmental factors, including the rising salinity of the soil. Rice cultivation helps to purify the soil of salt, thus preserving arable land, a process farmers call 'soil washing'. The discourse on the water crisis in Egypt appears to be explicitly biased against small-scale farmers as water use

Agricultural workers

Small farmers comprise the majority of the Egyptian farming population. They own small plots of land: 48% own less than one feddan (0.42 ha) while 43% own between 1 to 5 feddans (0.42 - 2.1 ha). The majority of farmland in Egypt (91%) is held by farmers who own less than 5 feddans.¹⁰ These smallholdings depend on unpaid family work and are also labour-intensive. Most agricultural labourers own no land. Due to the seasonal nature of the work, it is hard to estimate the exact number of agricultural labourers in

for the golf courses and landscape gardens of the compounds and gated communities of the ultra-rich in Cairo remains largely unquestioned. While the government is urging farmers to reduce their water consumption in agriculture and switch to modern irrigation systems, it is not investing in enabling small-scale farmers to do so

Furthermore, the government persists with desert-reclamation initiatives and selling reclaimed land to large corporations. It also grants land and water permits to prominent international firms for export agriculture, particularly to enterprises from the Gulf region which have acquired large tracts of land over the last 20 years. The government also recently inaugurated the New Administrative Capital scheme: a 59 billion US dollar investment project to build a new capital city in the desert, accompanied by adverts featuring artificial lakes and green leisure areas.⁷ Water scarcity is largely disregarded in these plans, overlooking the adverse effects on small farmers.⁸

The water crisis forms a current and critical threat to Egypt. According to estimates from the Egyptian government and international bodies, Egyptians are currently below the water poverty line of 1000 cubic meters per person per year. In 2018, the average citizen consumed approximately 585 cubic metres per year, and this is projected to fall to 490 cubic metres by 2025.⁹ To address the challenges related to water scarcity and population growth, the government is pursuing large-scale projects focused on seawater desalination, sewage treatment, and the reuse of agricultural water. These projects are often financed through development loans or with private-sector involvement. However, their high cost and the government's growing budget deficit jeopardise their implementation, forcing the government to borrow heavily to cover the shortfall.

Egypt. Some estimates put the total figure of agricultural workers at around 5 million, including seasonal labourers, who collectively produce around 65% of the country's domestic food consumption.¹¹

In the old lands of the Valley and Delta, many agricultural labourers work during harvest and cropping seasons, and then work in construction, contracting or other sectors that also depend on seasonal and temporary labour. In the large capital-intensive farms, agricultural labourers

include children, adolescent girls and women. In Egypt, some 1.6–2 million children work, in clear violation of the law. Child labour is prevalent in agriculture and related sectors and children are exposed to potentially fatal accidents, harassment and abuse.¹²

Egypt's agricultural workers, as is the case in many parts of the world, are amongst the most vulnerable sectors of the population. For instance, as a part of the COVID-19 social relief measures, the Egyptian government provided EGP

500 (about USD 32 at the 2020 exchange rate) to informal workers for three months from August 2020. According to government figures, nearly 1.6 million temporary workers benefited from this fund, most of whom worked in the construction, building and tourism sectors. However, most of those working in the agricultural sector were ineligible as they had not been registered in the system.¹³ As a result, the grant reached only a small percentage of these temporary agricultural workers.

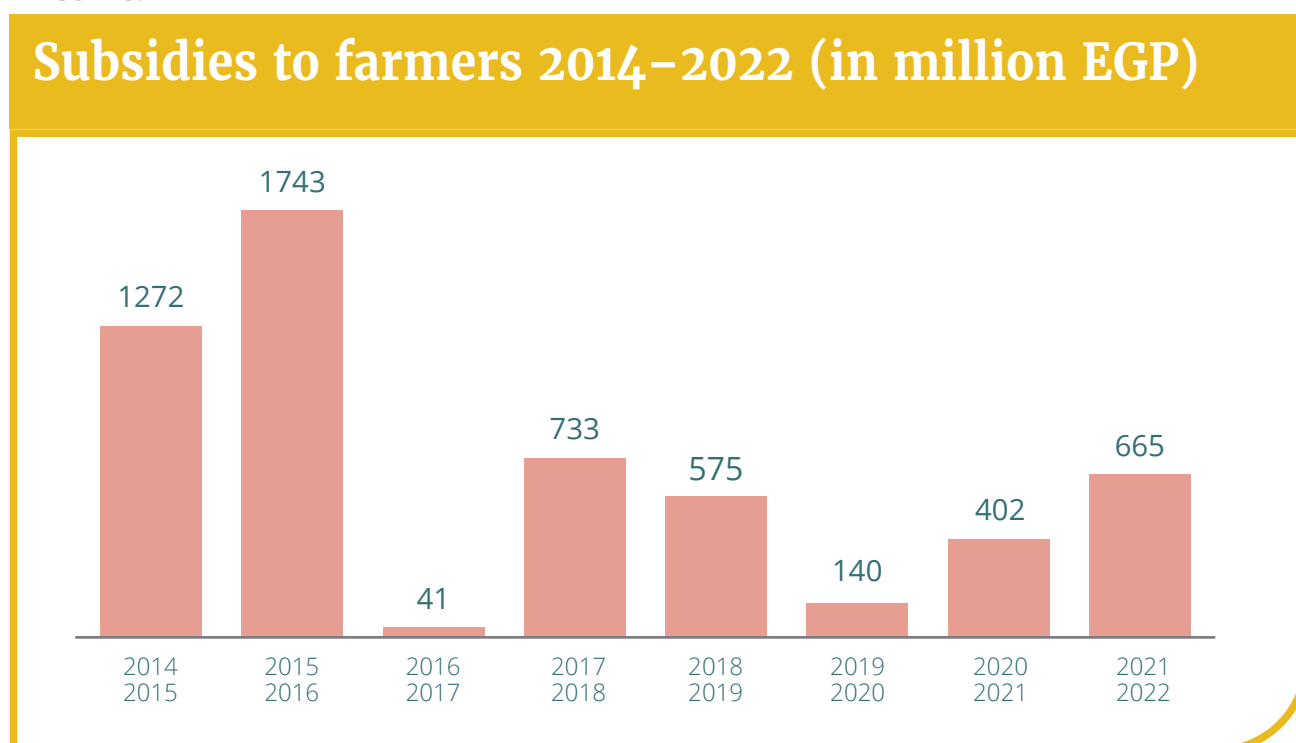
Farm subsidies and agricultural support

In general, the government has abolished subsidies for small farmers, gradually eliminating all technical and in-kind support for agricultural production in the Valley and Delta. It has also withdrawn subsidies for production inputs and credit support, and given complete freedom to the private sector to import and trade supplies.¹⁴ The Egyptian government does not provide direct cash support to small family farms to purchase agricultural inputs, but offers seed and fertiliser support to farms that grow strategic crops like wheat and cotton. Since the 1990s, however, these subsidies have gradually ceased under an

agricultural liberalisation policy informed by World Bank and USAID prescriptions. Austerity policies intensified after 2016 following a USD 12 billion loan agreement with the IMF. The agreement entailed the gradual elimination of energy subsidies - crucial for agriculture and irrigation - and introduced various measures to reduce other subsidies, most of which were for agricultural loans.

Figure 3 illustrates the significant reduction of government farm subsidies from 2014 to 2022, shown in absolute figures in EGP, despite the currency's depreciation by almost 74% between 2016 and the end of 2022.

FIGURE 3:



Source: Calculations based on the Egyptian State's General Budgets

As support for small farmers has declined, the focus has turned to export-oriented agriculture. The government provides cash support for exports and facilitates access of large farms to production inputs at below-market prices

because of economies of scale. Export subsidies increased from EGP 2.5 billion in 2014 to nearly EGP 7 billion in the 2021 budget, although not even 1% of companies in Egypt engage in export-related activities.¹⁵

Agricultural exports

The EU, the USA, China, Turkey, the United Arab Emirates (UAE), and Saudi Arabia are among Egypt's top trading

partners. Table 1 gives an overview of some of the main Egyptian agricultural exports.

TABLE 1:

Value of main Egyptian agricultural exports 2019–2021 (in million USD)

| Item | 2019 | 2020 | 2021 |
|---|--------------|--------------|--------------|
| Oranges, fresh | 638 | 668 | 646 |
| Grapes, fresh | 234 | 233 | 260 |
| Cotton, not carded nor combed | 159 | 161 | 219 |
| Potatoes, other than seed, fresh or chilled | 249 | 221 | 198 |
| Strawberries, fresh | 87 | 82 | 109 |
| Onions, fresh or chilled | 231 | 137 | 87 |
| Mandarins (including tangerines) | 177 | 91 | 79 |
| Fresh pomegranate | 67 | 63 | 70 |
| Lemons and limes | 39 | 43 | 44 |
| Other agricultural commodities | 767 | 999 | 1,219 |
| Total Agricultural Exports | 2,648 | 2,698 | 2,931 |

Source: Calculated from the CAPMAS Monthly Bulletin of Foreign Trade Data.

Food self-sufficiency, food security and sustainable development

Egypt meets 40–50% of its food needs from imports, making it highly vulnerable to fluctuations in global food prices.¹⁶ Although about 46% of agricultural land is devoted to grain cultivation, Egypt has a persistent trade deficit in grain as domestic production is insufficient to meet domestic demand. By the end of 2020, the food gap for grain crops was estimated to be about 22.1 million tonnes. For legumes, this was around 720,000 tonnes, with Egypt relying on imports for up to 90% of

its domestic consumption, particularly for fava beans and lentils.¹⁷ Egypt is self-sufficient in fruit and vegetables, which account for around 24% of the country's total cultivated area and the majority of agricultural exports. Table 2 shows Egypt's self-sufficiency rates for selected agricultural and food products. Noteworthy is the significant drop in self-sufficiency for wheat and other grain crops over the past decade.

TABLE 2:

Self-sufficiency rates (%) in selected agricultural and food products in Egypt 2013–2020¹⁸

| Food item | 2013 | 2014 | 2016 | 2017 | 2018 | 2019 | 2020 |
|--------------|-------|-------|-------|-------|-------|-------|-------|
| Wheat | 56.7 | 52.1 | 47.7 | 34.5 | 35.5 | 40.3 | 41.4 |
| Maize | 56.8 | 65.1 | 56.3 | 47 | 50.5 | 51.1 | 44.8 |
| Fava beans | 27.8 | 33.8 | 20 | 30.7 | 12.4 | 10.5 | 17.3 |
| Potato | 103.4 | 112.6 | 105.4 | 116.3 | 111.4 | 117.1 | 111.1 |
| Citrus fruit | 142.8 | 125.6 | 149.9 | 156.5 | 171.7 | 203.6 | 164.4 |
| Red meat | 74.3 | 71.9 | 64.6 | 55.9 | 48.8 | 55 | 46.5 |

Source: El Nour, S. (2023) 'Agricultural and food policies in Egypt between 2014 and 2021: What changed, what didn't'. Arab Reform Initiative.

Egypt has struggled to make progress towards the Sustainable Development Goals (SDGs), especially SDG 1 to reduce poverty and SDG 2 to end hunger. Egypt is a food-insecure country ranking 77 out of 113 countries on the 2022 Global Food Security Index (GFSI). From 2014 to 2020, about a third of the population suffered from malnutrition and 20–25% of under-fives were affected by stunting.¹⁹ In the last 20 years, poverty, undernutrition and other nutrition-related diseases have become strongly intertwined in Egypt. Poverty increased from 16.7% in

2000 to 29.7% in 2020, and undernutrition also grew from 14% in 2009 to 25% in 2018.²⁰ The Egyptian Household Health Survey provides a comprehensive picture of the relationship between poverty and malnutrition. The survey shows that childhood anaemia has increased from 27% in 2014 to around 43% in 2021.²¹

Since 2016, Egypt has faced challenges in achieving food security due to inflationary shocks. The persistent depreciation of the Egyptian pound and the country's struggle to accrue sufficient foreign exchange to purchase imports

have had catastrophic effects on the nutritional status of most Egyptians.²² Consequently, food insecurity is a growing problem amidst the current economic crisis, with the poverty rate close to 30% in 2020.

The state of food and nutrition insecurity in Egypt has been exacerbated, as is the case in many other countries, by the impacts of both the COVID-19 pandemic as well as the Russian war in Ukraine. With respect to the pandemic, while government policies protected investors and large agricultural producers, the same cannot be said for ordinary Egyptian households. A CAPMAS (Central Agency for Public Mobilization and Statistics) survey on the economic impact of the pandemic on Egyptian households found that over half resorted to borrowing from relatives and friends to meet their basic needs; and some 92% had to cut down on food and opt for cheaper alternatives to meat, poultry, and fish.²³ Rural areas were worse affected

than urban areas given their already higher poverty rates.

The food crisis resulting from Russia's invasion of Ukraine caused inflation to soar by more than 31% in February 2023, with food prices rising by almost 90% in one year. The war has hit Egypt particularly hard given its heavy reliance on imported staples, particularly wheat, 80% of which is imported from Russia and Ukraine. The war has disrupted many wheat shipments the Egyptian government had already purchased as a hedge against rising prices before the agreement brokered by the United Nations and Turkey to allow grain ships to sail from Ukrainian ports. This has led to higher wheat prices on the world market, and the government estimates that these could add EGP 15 billion to the cost of price-supports for bread.²⁴ Inflation of grain prices has affected the living standards of most Egyptians who rely on bread and grains to meet 35–39% of their daily caloric intake.²⁵



Agricultural trade policies

Since the mid-1970s, the agricultural sector in Egypt has undergone continuous liberalisation. The aim was to rapidly integrate the sector into the global economy, focusing on the development of large-scale, export-oriented agriculture and raising the competitiveness of Egyptian exports, particularly in Europe and the Arabian Gulf, to obtain hard currency. This approach has failed. From 1975 to 2015, the trade deficit in agricultural commodities increased significantly and the continued growth in

agricultural exports did not offset these imports, especially of grain. Agricultural exports were mostly raw, unprocessed agricultural products with little or no value added. Egypt has not achieved a surplus in its agricultural trade balance since 1974. It remains highly dependent on agricultural imports which have outstripped the value of agricultural exports.²⁶ Egypt's growing dependence on importing essential food items has made it the world's largest importer of wheat.



Trade regimes and agreements governing agricultural trade in Egypt

Egypt, like many other low and middle-income countries, began integrating into the global economy in the 1980s and 1990s. It officially joined the World Trade Organisation (WTO) in June 1995.²⁷ The WTO Agreement on Agriculture (AoA) is a crucial component of the WTO legal framework, governing agricultural trade and domestic policies. The AoA has undergone several rounds of negotiations since its inception in 1995, aiming to further liberalize agricultural trade and address emerging issues as agreed in the AoA. Despite negotiations being halted for years, in 2015, WTO members agreed to a historic decision to phase out agricultural export subsidies by 2023. However, the impact on agricultural trade has been mixed: as trade

liberalisation has facilitated trade flows in some products, it has also contributed to market instability and challenges, especially for developing countries

Agricultural trade policies in Egypt were heavily influenced by its accession to the WTO, after which it has signed several regional trade agreements.²⁸ Since the 1990s, Egypt has reduced subsidies for fertilisers and other inputs while supporting export subsidies to promote an export-oriented economy.²⁹ Table 3 gives an overview of some of the most important trade regulations and agreements – bilateral, regional, and multilateral - that govern agricultural trade in Egypt.

TABLE 3:

Main trade agreements governing agricultural trade in Egypt

| Year | Trade agreement | Main features |
|------|--|---|
| 1981 | Greater Arab Free Trade Area (GAFTA Agreement) Regional agreement | In 1981, 17 Arab League states initiated the GAFTA Agreement and agreed on its terms in 1997 with Egypt joining in 1998. It aims to facilitate and develop trade among Arab countries by eliminating non-tariff barriers, including administrative, monetary, financial and technical barriers, and reducing customs duties annually for 10 years (with a 10% reduction from 1998 to 2003 and 20% from 2004 to 2005) in order to achieve a free-trade area in 2007. Subsequently, the 2002 Arab Summit agreed on a 100% reduction in customs duties in 2005 and to grant preferential treatment to the least developed member states. |
| 1995 | General Agreement on Trade and Tariffs (GATT) Multilateral agreement | Egypt signed several agreements under WTO/GATT, including the Agreement on Agriculture which contains provisions related to: <ul style="list-style-type: none"> • Market access: To improve market access for agricultural products by eliminating trade barriers and replacing non-tariff restrictions like seasonal quotas and import quotas with tariffs, although its implementation has been challenging. • Domestic support: To revise domestic subsidies for agricultural produce. Various forms of support for disaster relief, research and development (R&D), and for L&MICs like Egypt, some support for inputs are allowed. • Export subsidies: The Agreement decreed the gradual elimination of export subsidies, but agricultural exporters still receive subsidies in Egypt.³⁰ |
| 1998 | Common Market for Eastern and Southern Africa (COMESA) Regional agreement | The COMESA Agreement was initiated as a preferential trade area to establish a free-trade zone among member states, which would later become a customs union and then a common market. Egypt joined in 1998, along with 19 other active member states. As a COMESA member, Egypt completely exempts goods and products bearing certificates of origin from customs duties and any other duties or taxes with similar effects. Based on the Convention's rules of origin, customs exemptions apply to all imports of goods originating in member states with an added value of up to 45%. In June 2009, COMESA started its customs union to gradually reduce and unify foreign tariffs from 2009 to 2018, with a monetary union anticipated by 2025. |

| | | |
|------|---|--|
| 2001 | EU-Egypt Association Agreement (EEAS) Bilateral agreement | <p>The EEAS set out to establish a free-trade area between the EU and Egypt within 12 years. It stipulated total or partial customs exemptions for four main groups of agricultural commodities and allowed for the export of over 100 commodities to the EU (compared to only 25 in the 1970s) including:</p> <ul style="list-style-type: none"> • Commodities with quantitative quotas and specific export seasons, which are subject to customs tariff exemptions: potatoes, onions, garlic, cut flowers, carrots, cucumbers, green beans and strawberries. • Commodities with quantitative quotas and no specific export seasons, which are subject to a customs exemption within the quotas: onions, tubers, frozen and preserved vegetables, dried vegetables, potatoes, oranges, pears, dried fruits, rice, sesame oil, molasses and peanuts. • Commodities with specific export seasons and no quantitative quotas, which are subject to customs exemption within the scope of the export seasons: artichokes, mushrooms, grapes and watermelons. • Commodities with no specific quantitative quotas or export seasons: dates, guava, mango, citrus fruits (mandarin, grapefruit, lime, lemon), black pepper, anise, fennel, coriander, caraway, seeds, and plants used in the production of perfume and medicine. |
| 2001 | Arab-Mediterranean Free Trade Agreement (The Agadir Agreement) Regional agreement | Signed between Egypt, Morocco, Jordan and Tunisia. It is compatible with GATT and aims to establish a free-trade area among Arab Mediterranean countries. It came into force in 2005. |
| 2007 | Free Trade Agreement between Egypt and the European Free Trade Association (EFTA) Regional agreement | EFTA member states, including Iceland, Liechtenstein, Norway and Switzerland, signed a free-trade agreement with Egypt that came into force in 2007. The agreement aims to support and increase bilateral trade, and promote economic integration in the Euro-Mediterranean region by liberalising trade of manufactured industrial and agricultural products. The agreement gradually reduced Egyptian customs tariffs on industrial and agricultural imports from EFTA countries and eliminated customs duties on all industrial products by January 2020; and liberalised Egyptian exports of industrial products. |

In addition to these trade agreements, Egypt has signed several other bilateral agreements, including with Jordan (December 1999), Lebanon (March 1999), Libya (January 1991), Morocco (April 1999), Syria (December 1991) and Tunisia (March 1999). In 1995, Egypt and China signed a trade agreement, and Egypt also signed an economic treaty with Russia.

In 2019, Egypt joined the International Union for the Protection of New Varieties of Plants (UPOV).³¹ The UPOV Convention is aimed at protecting the interests of seed producers and biotechnology controllers, in direct violation of farmers' sovereignty over seeds. It effectively treats seeds as private property to be traded under legislation protecting 'plant breeders' rights' (PBR). This grants private

companies exclusive control over cultivated crop varieties that ultimately depend on the native and local varieties developed by farmers over generations. The seed industry has used its technical and political power to exert control over the commodification of seeds and pressured national and international legal institutions and frameworks to

develop intellectual property rights legislation at the global and local levels. This has made it illegal to conserve and exchange patented seeds – an issue which is potentially relevant with regards to Egypt’s reliance on imported seed potatoes, as will be discussed later.³²

Agricultural trade between Egypt and the EU

In June 2001, Egypt signed a partnership agreement with the EU that came into force on 1 June 2004. This granted immediate duty-free access to EU markets for Egyptian products, while duty-free access for EU products was to be phased in over 12 years. In 2010, Egypt and the EU added an annex on agriculture to the agreement, liberalising

trade in more than 90% of agricultural goods exchanged.³³ The figures released in 2021 by the EU Directorate-General for Agriculture and Rural Development (DG AGRI) provide insight into the nature of EU imports of agri-food products from Egypt (see Table 4).³⁴

TABLE 4:

Exports of agri-food products from Egypt to the EU 2017–2021 (in million EUR)

| | 2017 | 2018 | 2019 | 2020 | 2021 | Share of all EU agri-food imports 2021 |
|--|------|------|------|------|------|--|
| Vegetables, fresh, chilled, and dried | 294 | 242 | 402 | 344 | 344 | 29.2 |
| Fruit, fresh or dried, excl. citrus and tropical fruit | 163 | 200 | 225 | 215 | 233 | 19.7 |
| Citrus fruit | 111 | 129 | 102 | 177 | 184 | 15.6 |
| Oilseeds, other than soyabeans | 46 | 42 | 47 | 48 | 78 | 6.6 |
| Preparations of vegetables, fruit or nuts | 40 | 56 | 54 | 58 | 65 | 5.5 |
| Offal, animal fats and other meats, fresh, chilled and frozen | 27 | 24 | 28 | 38 | 44 | 3.7 |
| Sugar, other than beet and cane | 23 | 11 | 15 | 9 | 36 | 3.1 |
| Bulbs, roots and live plants | 27 | 26 | 29 | 29 | 34 | 2.9 |

The EU’s imports of fresh and frozen vegetables from Egypt fell by 14% in 2020 compared to 2019, but imports of citrus fruits, specifically oranges and lemons, increased by 74%. This suggests that Egyptian fruit exports successfully met the growing demand for citrus fruits in the EU during the pandemic. However, these come from large farms in the eastern and western parts of the Delta, which are owned by large agricultural companies.

The CAP accounts for nearly one third of the EU budget (31%), totalling approximately €378.5 billion in allocations for the 2021-2027 period.³⁵ This investment demonstrates the EU’s commitment to its agricultural sector, providing a comprehensive policy framework that supports EU farmers with direct payments, market stabilization measures, and rural development programs. These measures aim to stabilize incomes, foster the adoption of advanced

agricultural technologies, and ensure the competitive pricing of EU agricultural products on the international stage.

Conversely, Egyptian agricultural policy since the 1980s has increasingly moved towards market liberalization and a reduced governmental role, departing from earlier policies that regulated crop prices and crop rotation. This liberalization has involved deregulating essential agricultural inputs like seeds and fertilizers, coupled with a phased reduction in state subsidies, particularly impacting smallholder farmers. As a result, Egyptian smallholders have encountered heightened production costs and a greater

vulnerability to market fluctuations, with reduced government support compounding these challenges.³⁶

The juxtaposition of EU and Egyptian agricultural policies has led to a pronounced imbalance. EU farmers benefit from the extensive protections offered by the CAP, while Egyptian farmers face a more demanding environment characterized by scant state support and increased market risks. (El Nour, 2019). This divergence in agricultural policy and support has critical effects on EU-Egypt trade relations, influencing the competitiveness and sustainability of Egyptian agriculture in the global economy.³⁷



Case study of the potato value chain

After rice and wheat, the potato is the world's third most important food crop for human consumption. The FAO has noted that potato production in Europe is declining while growing steadily in low and middle-income countries; global production has almost doubled over the last 20 years.³⁸ Potatoes succeed in diverse climate and soil conditions, are high-yielding, and require abundant and

cheap labour, making them suitable for production in low and middle-income countries.³⁹ Given that potatoes are Egypt's second-largest export crop to the EU, the potato value chain makes for an interesting and relevant case study to examine the complexity between agricultural trade policies and sustainable development.

The potato value chain in Egypt

Since the 1990s, potatoes have been a significant item in the Egyptian food basket. Potatoes are used in the home and have recently become a popular affordable meal served by *Foul*, *Falafel*, and *Ta'ameya* carts across Egypt. Around 86,000 ha are under potato production in Egypt, although this varies from year to year with the three different seasons of potato cultivation. The first season is the summer season, planted primarily with imported seed potatoes from abroad.⁴⁰ The main purpose of this season is to produce seedlings for cultivation in the winter season. The summer season in Egypt produces about 900 thousand tons annually. As for the second season, the winter season, planting takes place in September, producing around 800 thousand tons, with 300 thousand tons exported. This is the main export season in Egypt. The third season is the between season, historically associated with exports to the English market specifically. Currently, this season produces about 300 thousand tons, with a significant portion consumed domestically.

Land, labour, seeds, fertilisers, pesticides and water are all factors of production used in the growing of potatoes. Before planting, land is ploughed using automatic ploughs that are usually rented from other farmers who have accumulated earnings from non-agricultural work. Some farmers own large agricultural machinery such as tractors, trailers and different types of plough, while some non-farmers provide these services. The cost of using these machines has gone up significantly because they rely on energy, in particular kerosene, which is far more expensive since the government lifted energy subsidies. Since 2014, the price of kerosene has tripled from EGP 1.8 per litre to almost EGP 6.5 in 2023, with prices rising even higher in rural areas because of additional delivery costs. The price of kerosene and diesel affects ploughing and irrigation costs and overall profit margins. Paying for expensive seed potatoes can be a constraint along

the value chain, along with the costs of storing local seed potatoes in refrigerators. It costs between EGP 100 and EGP 150 a month to store one tonne of seed potatoes, although this varies as most refrigeration facilities in Egypt are privately owned. Often, small-scale farmers borrow informally from family members to finance potato cultivation. This has become more widespread as the state-owned Development and Agricultural Credit Bank has minimised its role in lending. Alternatively, farmers rely on personal savings from agricultural or off-farm work.

Potato cultivation shows two contrasting patterns of using agricultural labour, depending on the size of the family and the scale of available remittances. While some can afford to employ workers, farmers often assist each other by exchanging labour for different tasks at different times – a form of solidarity that transcends solely economic considerations. Fieldwork for this case study found that such unpaid work is common by family members and other relatives.⁴¹ This pattern is especially common during more labour intensive activities such as planting or harvesting. The various types of labour involved in potato farming, including family labour, wage labour (either in-kind or cash payments) and reciprocal or solidarity arrangements, make it difficult to calculate the direct economic cost of agricultural operations. Yet these non-formal economic activities are increasingly important in the agricultural sector due to inflation and the rising cost of living, which subsequently also pushes up the cost of labour.

There are various marketing challenges in the potato value chain. Small farmers often lack bargaining power, leaving traders with significant market power and control over prices. This is further complicated by the fact that potatoes cannot be stored for extended periods, and those intended for use as seeds for the next season are often kept in rented refrigerated spaces for months, meaning that storage is an additional cost if farmers want to market

their crops locally. Ownership of (refrigerated) storage space is also highly concentrated. These additional costs are passed on to the consumer, leading to higher prices of potatoes in urban areas.

Table 5 shows the substantial rise in production costs since 2020. This is mainly due to rising input prices since the beginning of 2022 which resulted from the liberalisation

of the exchange rate and devaluation of the local currency. Potatoes take around four months to grow, meaning that the farmer earns an estimated maximum profit of EGP 2,375 per feddan: below the minimum wage of EGP 3,000 per month. According to farmers, the production cost per feddan in the old lands and the Delta was almost EGP 40,000 in 2020 and has increased in recent years.

TABLE 5:

Comparison of production costs per feddan, 2020–2022

| Cost item | Cost (EGP) – 2020 | Cost (EGP) – 2022 | Cost Rate of Change (%) |
|--------------------------------|-------------------|-------------------|-------------------------|
| Land lease | 8,000 | 10,000 | 25% |
| Seeds | 20,000 | 28,000 | 40 % |
| Land preparation and ploughing | 4,000 | 5,000 | 25% |
| Hoeing | 1,500 | 2,000 | 33% |
| Fertilisers and pesticides | 5,000 | 7,000 | 40% |
| Harvest | 3,000 | 4,000 | 33% |
| Irrigation | 1,500 | 2,000 | 33% |
| Total | 43,000 | 58,000 | 34 % |

Source: Figures collected and calculated based on author’s interviews with farmers and a report by Al-Mal newspaper in 2022

Despite a steady increase in the cultivated area of highly productive imported potato varieties and their corresponding yields per feddan from 2020 to 2022, small farmers who rely on potatoes as a cash crop did not reap the benefits due to low domestic prices and limited access to export markets as well as rising costs of production. Around 15% of potato production is exported annually, and seasonal price fluctuations affect small farmers who lack long-term storage facilities. Consequently, intermediaries, traders and those who can store the crop in refrigerators for more than three months benefit most from the added value and high profitability.⁴²

The large difference between potato prices at the farm gate and what the final consumer pays highlights the process of economic value extraction and the stripping of added value from cash crop production.⁴³ This is largely explained by the length of the supply chain and the fragmentation in Egypt’s agricultural trade markets, which

involve many intermediaries. Small farmers often lack negotiation skills, and pricing is frequently determined by the trader. In some cases, prices may be based on previous yields or set at the beginning of the planting season itself. Interestingly, farmers often have knowledge of market dynamics through frequent news updates from sources such as newspapers and websites. For example, they may know about the increasing trend in potato exports and government encouragement to export more potatoes. However, while farmers can obtain good retail prices in local markets, they cannot sell large volumes, so for many small producers, wholesale is the only option. Traders and intermediaries often drive down producers’ selling price, especially if there are indications that export prices will fall. In sum, farmers do not earn much income from potatoes, but cultivate them because they are easy to sell and help them repay debts, purchase animals for breeding or cover other major expenses.

Trade with the EU

Potatoes are Egypt's second-largest export crop to the EU after oranges. Additionally, around 200,000 tonnes a year of seed potatoes are required for annual plantings in Egypt, of which approximately 45,000 tonnes are imported

from Europe for the spring season. Table 6 provides an overview of the main European destinations (including Russia) for Egyptian potatoes in 2022.

TABLE 6:

Main European importing countries of Egyptian potatoes in 2022

| Importing Country | Exported value in USD thousand | Share in value in Egypt's exports in % |
|--------------------|--------------------------------|--|
| Russian Federation | 127,236 | 40.3 |
| Greece | 32,804 | 10.4 |
| Italy | 17,685 | 5.6 |
| Germany | 15,183 | 4.8 |
| Slovenia | 8,476 | 2.7 |
| Belgium | 4,644 | 1.5 |
| Netherlands | 3,539 | 1.1 |
| Spain | 3,237 | 1 |

Source: ITC calculations based on UN COMTRADE statistics.

The implementation of COVID-19 related lockdowns in European countries, particularly of the service and hospitality sector, had a significant impact on Egypt's potato exports as most exports of potatoes from Egypt are not destined for household consumption in Europe but for restaurants, fast-food outlets and 'half-fried' processing plants. Closures of restaurants and processing plants therefore resulted in a sharp decline in demand from April until the end of 2020, with exports falling from 850 thousand tons to 673 thousand tons.⁴⁴

Small farmers suffered most from declining potato exports since they relied on selling their crop to wholesalers who then sold them on to large exporters. When European demand dropped, large producers sold their own crops for export and did not buy from small farmers. Local potato prices fell by more than half, prompting many farmers

to use part of their crop as livestock fodder rather than sell at a loss or even to destroy their potato crop in protest. An expansion in the area under potato cultivation at the beginning of the 2019 winter season made the sudden suspension of exports especially devastating for small farmers. Consequently, the winter harvest, which is typically earmarked for export, was especially affected. As the situation gradually returned to normal and EU demand resumed, stored potatoes were exported. However, since small farmers could not store their crops in refrigerators, they suffered more serious losses than larger producers.⁴⁵ The government did not provide much targeted support to these small farmers, the main form of economic relief coming from a general allocation of approximately EGP 7 billion for agricultural export subsidies as part of the government's COVID-19 Response Plan.⁴⁶

Monopoly power in the seed sector

Egypt is highly reliant on the import of European seed potatoes which make up almost 50% of the production cost. This import market is highly concentrated, with only 40 companies having a license to import seed potatoes, and a smaller number of exporters having access to foreign markets. Trade is dominated by a few large companies, namely Deltax, Domiatec, and the Union Procedures and Exports of Horticultural Crops (UPEHC), which is a coalition of potato exporters. These companies manage seed potato imports and potato export operations through Egypt's quotas to access various markets, particularly in Europe.

Import and export businesses exert their influence throughout the supply chain, though farmers may not be aware of this as they mainly interact with intermediaries and smaller traders. Institutional arrangements between the state, specifically the Ministry of Commerce and Industry and the private sector also play an important role in this monopolistic market. For instance, the Agriculture Export Council (AEC) and UPEHC are affiliated with the Ministry of Commerce and Industry while the Chair of the Board of Directors of Deltax, Egypt's largest export company, is also the Chair of the AEC Potato Committee.

Egypt imports seed potatoes from eight European countries. In 2022, 38% of imports were from the Netherlands, followed by 30% from Scotland. The remainder are from Austria, Belgium, Denmark, France and Luxembourg.⁴⁷ A 2021 study relied on unpublished data from the Central Administration of Plant Quarantine to show the extent of

monopolisation in Egypt's potato import market. The top four importers are private companies who together control nearly 60% of annual seed potato imports: Domiatec Group imported around 22.5 thousand tonnes (20% of total seed imports), followed by AgroFood with 17.5 thousand tonnes (16%), Daltex with 12.5 thousand tonnes (11.3%) and UPEHC (10%).⁴⁸

It remains to be seen how the import of seed potatoes as well as the use and exchange of potato seeds will be impacted by the UPOV Convention, which, as mentioned earlier, Egypt acceded to in 2019. The 50% collapse of the exchange rate in 2016 had a major impact on these imports while the rise in production costs following the continued liberalisation of fuel prices since 2014 increased the re-use of potato seeds. The UPOV Convention however formally prevents farmers from producing and reproducing the seeds they grow and limits the ability of the Egyptian government to breed plants or transfer technology. It compels national breeders and local seed companies to purchase seeds from foreign companies. Despite being in contravention of Article 79 of the current constitution, the agreement was hastily passed without consulting or engaging farmers' organisations.⁴⁹ The agri-export lobby, comprising influential businesspeople and MPs, expedited the passage of the agreement under the pretext of facilitating Egyptian exports to Europe. However, accession to this convention was neither mandatory nor an EU requirement for Egypt to continue exporting to the EU market.⁵⁰

Conclusion

In Egypt, the problems in the country's food system and agricultural trade model can be illustrated through the case of potatoes and other export crops. Agricultural trade policies have integrated small producers into the global market with little to no competitive advantage. The government sets no minimum prices for crops sold by small farmers nor are there any government subsidies to compensate when the price drops below the cost of production, as it does frequently. While the private agricultural sector receives institutional and financial support, small farmers have little influence over public policy. This has allowed major trading companies to exercise significant control over key agri-food product markets. In the case of the potato value chain, this includes control over the importation of seed potatoes, especially from the EU, ownership of large refrigerators for potato and seed storage, and to a lesser degree, control over processing and sales to large restaurants.

Moreover, the export-oriented model has failed to reduce the deficit in the agricultural trade balance; indeed, it has increased in recent years. An (over)reliance on world markets for access to healthy food means fluctuations in the local currency or global food prices directly affect millions of Egyptians. Trade liberalisation through multilateral and bilateral agreements that included tariff reductions and export quotas have further entrenched Egypt's reliance on food systems in high-income countries, particularly the EU.

In order to achieve its commitments under the SDGs, particular SDG 1 to reduce poverty and SDG 2 to end hunger and malnutrition, agricultural and food policies in Egypt need to prioritise rehabilitating small-scale agriculture and focus less on large companies in private, export-oriented agriculture. The government needs to develop inclusive food and agricultural policies that enhance the resilience of food systems in the face of recurrent shocks and crises by promoting local food production, shortening supply chains, increasing food self-sufficiency and facilitating access to food for marginalised groups.

This requires that small farms in the agricultural sector are able to gain from any trade agreements that are (re)negotiated. Small farmers' access to (export) markets must be guaranteed and their positive contribution to sustainable development must be taken into account. To this end, it is recommended that the Egyptian government commission an independent impact analysis on the role of small farms in Egypt's economy and in reaching the Sustainable Development Goals. This impact analysis should contain an examination of the current export-oriented policy system and its impact on small farms, sustainable development, and the environment. This impact analysis should be integrated into all relevant trade agreements that are negotiated.

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شبكة سيادة

SIYADA NETWORK

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