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EGYPT POLICY DIALOGUES

AGRICULTURAL AND FOOD POLICIES IN EGYPT BETWEEN 2014 AND 2021: WHAT CHANGED AND WHAT DIDN'T

In partnership with



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Cover photo: Farmers harvest wheat in a traditional way with reaping hooks, Faiyum, Egypt, 16 April 2018. ©Ahmed Al Sayed/Anadolu Agency

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Executive Summary

Food and food security have become critical, as recently highlighted by the COVID-19 pandemic, the war in Ukraine, and the disruption of food supply chains, especially wheat, vegetable oils, and agricultural fertilizers. This is also compounded by climate change, environmental degradation, and pollution. Together, these issues have exacerbated hunger and food shortages, thereby heralding a new food crisis, perhaps more severe than that witnessed in 2008 and triggered political and economic instability and social unrest in the global South.

In Egypt, since President El-Sisi came to power, agricultural and food policies have undergone significant changes, whether in the number and size of the announced projects, the food subsidy system, or the legal and legislative amendments accompanying these projects and reforms. So, to what extent have agricultural and food policies changed in Egypt?

Applying a multipronged approach, this study aims to provide a deeper understanding of agricultural and food policies by analyzing the reference base of agricultural and food projects and programs and their implementation in Egypt between 2014 and 2021. It also seeks to provide a critical reading of what changed and what did not.

The results of the study showed that the current agricultural and food policies in Egypt are to a certain extent a continuation of policies implemented during the Mubarak era in terms of the centralization of land reclamation, the mode of mass production, the access granted to major Egyptian and foreign investors to land and water resources, the focus on export agriculture, and the marginalization of small-scale farmers and food producers. However, these policies differ from those of the Mubarak era in terms of the emerging role of military-owned companies and their increased involvement in agricultural and food projects, as well as the direct role of the Presidency, the President's follow-up of the projects and interference in their timeline, and the concentration of national projects in the hands of the President and his close entourage.

Introduction

Agriculture is a key sector for development in Egypt and a major pillar of its economy. In 2021, it contributed to an estimated 12.1% of GDP, with a real growth rate of 3.3%. The agriculture sector employs the highest share of the total workforce, with 20.3%, followed by trade and transport (14.5%), construction and building (13.4%) and manufacturing (13%).¹ Agriculture also contributes to approximately 18% of the commodity export earnings.²

Agriculture and food are interrelated; agriculture supplies the population with food and the food manufacturing industry with basic materials. It also contributes to the international and domestic market of food commodities.³ Therefore, for a more meaningful analysis, this study expands to include both agricultural and food policies.

Since President El-Sisi came to power, agricultural and food policies have undergone significant changes, whether in terms of the number and size of agricultural projects, the food subsidy system or the legal and legislative amendments accompanying these projects and reforms. This study aims to provide a deeper understanding of agricultural and food policies by analyzing the reference base of agricultural and food projects and programs and their implementation in Egypt between 2014 to 2021. It is not a comprehensive assessment of agricultural and food policies, but rather a critical reading and analysis of what changes and what did not in those policies, highlighting some models of agricultural and food projects.

Theoretical and Methodological Considerations

Defining the concept of public policy is central to determining the angle of analysis. For this study, this paper focuses on a two-pronged concept. The first adopts the definition of

Thomas Dye⁴, who sees public policy as the choices of the ruling authority to do something or refrain from doing it. In this sense, Dye offers a material definition of public policy, suggesting that it is not just a narrative; it is also an expression of the “activities of the ruling authority”. Interestingly, the focus is not only on what the ruling authority does but also on what it refrains from doing, that is, on what the ruling authority chooses not to do. The authority’s failure to do something constitutes a political choice that affects society. The second prong of this concept is seen as part of power relations and tackles the questions of “who are the policymakers?”, “who is in charge of changing and implementing policies?” and “who benefits from the policies?”⁵ Here, the concept of power is central to understanding public policies. According to Lasswell and Kaplan (1950), the political process is the formation, distribution and exercise of power. Hence, public policy details who gets what, as well as when and how they get it.⁶

These two aspects (choice and power) are the basis of the analysis that this study will present. Analyzing public policy means examining the plans, programs, decisions and laws implemented by the government to determine who gets something and who does not, as well as when and how. In other words, our analysis aims at understanding the actions and objectives of the ruling authority, how it goes about achieving them, and the effects of that method on the different social groups.

Defining agricultural and food policies requires knowledge of food and agricultural systems to be able to determine the scope of the relevant public policies. Food and agricultural systems refer to a complex chain of activities and interactions that links together food production, processing, distribution, consumption, and waste management, as well as all associated institutions and organizational activities.^{7, 8}

Based on the concepts of public policies and food and agricultural systems, this study adopts the procedural definition of agricultural and food policies as the measures that the ruling authority undertakes or refrains from undertaking regarding agriculture and food. Such measures include strategic plans, laws, and programs that govern the

1 Central Agency for Public Mobilization and Statistics (2021), Statistical Overview, Central Agency for Public Mobilization and Statistics, Cairo.

2 State Information Service, <https://is.gd/X9hZYi> (accessed July 15, 2022).

3 Abdel Fattah Mohamed Hussein, (2019), “Investment Policies as Part of the Sustainable Development Strategy, Egypt's Vision 2030”, Policy Booklets, Issue No. 9, Institute of National Planning, Cairo. (السياسات الاستثمارية في إطار استراتيجية التنمية المستدامة، رؤية مصر 2030، دراسات السياسات، عدد 9، معهد التخطيط القومي، القاهرة)

4 Dye, T. R. (2013). *Understanding Public Policy*. Pearson.

5 Cairney, P. (2019). *Understanding Public Policy: Theories and issues*. Bloomsbury Publishing.

6 Lasswell, H. D. and A. Kaplan (1950). *Power and Society: A Framework for Political Inquiry*. New Haven and London: Yale University Press.

7 Kameshwari, P., & Kaufman, J. (2000). “The food system: a stranger to the planning field”. *Journal of the American Planning Association*, 66(2), 113-124.

8 Lamine, C. (2020). *Sustainable Agri-food Systems: Case Studies in Transitions towards Sustainability from France and Brazil*. Bloomsbury Publishing.

5 Agricultural and Food Policies in Egypt between 2014 and 2021: What Changed and What Didn't

production, manufacturing, distribution, and consumption and determine who is involved in what, when, and how.

The study adopts multiple approaches to the analysis of agricultural and food policies in Egypt. The descriptive and analytical approach seeks to provide a quantitative and qualitative description of general plans, strategies, programs, and projects. The legal approach monitors and analyzes legal texts and regulatory procedures related to the conduct of political actors and their impact on policy. The organizational approach tries to understand organization and continuity, as well as institutional changes that have affected the path, form, and nature of agricultural and food policies in Egypt. The study also relies on case studies and uses secondary data collected from official statistical bodies or presidential speeches, government statements, and official reports and government publications.

Plans: Features of Long-Term Agriculture and Food Plans

This section focuses on the analysis of agriculture and food content in both the 2016 Sustainable Development Strategy (Egypt Vision 2030)⁹, and the July 2022 State Ownership Policy Document.¹⁰ The two documents define the basic features of the long-term vision of public policies and sustainable development plans in Egypt. While many studies would also refer to the 2030 Sustainable Agricultural Development Strategy,¹¹ the latter was issued in 2009 under Mubarak and is currently being updated, as the Ministry of Agriculture signed an agreement with FAO.¹² However, the 2030 Sustainable Agricultural Development Strategy will be useful when compared to the current vision (see below).

9 Ministry of Planning, Monitoring and Administrative Reform, (2016), Egypt's Sustainable Development Strategy (Egypt's Vision 2030), Ministry of Planning, Monitoring and Administrative Reform, Cairo.

10 Presidency of the Council of Ministers, State Ownership Policy Document, Arab Republic of Egypt, June 2022.

11 For example, see Hanan Rajai, "National Projects and Economic Support, Egyptian Vision", Issue 67, August 2020, Al-Ahram, p. 22-29. (حنان رجائي، المشروعات القومية ودعم الاقتصاد، رؤية مصرية، عدد 67، أغسطس 2020، الأهرام، ص 22-29) and Abdel Fattah Mohamed Hussein, "Investment Policy for Agriculture as Part of the Sustainable Development Strategy, Egypt's Vision 2030", Policy Booklets Series, Issue No. 9 of January 2019, Institute of National Planning, Cairo. (السياسة الاستثمارية للزراعة في استراتيجية التنمية)، مستدامة: رؤية مصر ٢٠٣٠، سلسلة كراسات السياسات، عدد ٩ يناير ٢٠١٩، معهد التخطيط القومي، القاهرة)

12 For the technical support agreement between the Ministry of Agriculture and Land Reclamation and FAO, see <https://moic.gov.eg/ar/project/30> (accessed on 10/7/2022).

Egypt Vision 2030 does not feature agriculture and food as a focal point or one of its pillars. Its three focal points are economic, social, and environmental. The economic focal point includes the pillars of economic development, energy, innovation, scientific research, transparency, and institutional efficiency, while the social focal point includes the pillars of social justice, education, training, health, and culture. The environmental focal point includes the pillars of environment and urban development. In addition, the tables detailing economic objectives and the path to be followed until 2030 show only agricultural imports and the need to provide the necessary funds for them.

Nonetheless, Egypt Vision 2030 tackled agricultural development policies in several ways, which can be summarized as follows:¹³

1. Ensuring horizontal expansion and development of capture fisheries and fish farming.
2. Developing agricultural technology and information systems, optimizing water use, and protecting lands.
3. Developing agricultural extension systems and voluntary institutions for farmers and activating the role of agricultural media.
4. Promoting contract farming and regional agricultural cooperation and supporting the agricultural investment climate.
5. Ensuring the availability and quality of food commodities.
6. Protecting consumers and providing quality assurance of goods and services.
7. Continuously developing the bread subsidy scheme and the subsidy system to ensure that food subsidies reach those who deserve them.

In the planned projects section, there are several agricultural and food projects, namely:¹⁴

1. A project to increase agricultural land and support the industrialization of agriculture.
2. A project to develop fish farming projects.
3. The national program to develop livestock, poultry and fisheries.
4. A project on developed grain silos.

Finally, the strategy includes several other projects planned for implementation in the agriculture and food sector; some are clearly defined, such as "the project to establish the Global Logistics Center for Grains, Cereal and Food Commodities, for the trade and manufacturing of cereals, grains and food commodities in Damietta." However, others are less clearly defined such as "the project to increase the agricultural area

13 Egypt's Sustainable Development Strategy (Egypt's Vision 2030), p. 41-42.

14 Egypt's Sustainable Development Strategy (Egypt's Vision 2030), pp. 60-69.

6 Agricultural and Food Policies in Egypt between 2014 and 2021: What Changed and What Didn't

and support the industrialization of agriculture.” All projects presented in the strategy attempt to address the food and agricultural challenges by influencing the entire food chain, from production, manufacturing, transport, and trade, to consumption.

According to official discourse and economic indicators, the agriculture and food sectors are key to achieving sustainable development. Nonetheless, the Sustainable Development Strategy (Egypt Vision 2030) does not give them sufficient attention as they do not appear among the goals it sets with clear mechanisms, tools, and a schedule for their fulfillment.

The State Ownership Policy Document focuses mainly on the relationship between the public and private sectors and state policies to divest from economic activity while retaining a share in sectors it considers vital or in need of state support. This political vision came after debates among the private sector and international organizations about the growing role of the state in the economy. The document explains the sectors to be affected by state divestment, its extent and its timeframe.

According to the document, the state puts forward a divestment from the agricultural sector by 83% within three years while retaining and stabilizing its acquisition at 17%, and a divestment from the food and beverage industries by 73%, while retaining 27%. This represents the highest percentage of state divestment compared to other sectors, such as real estate where the state still retains 50%, 58% in transport and 78% in media and communication.¹⁵ The State Ownership Policy Document also indicates that the divestment will take place within three years. A detailed process has been specified for aquaculture, livestock, horticultural crops, tree forest cultivation, and cereals (except wheat). It also detailed how divestment will happen for retail projects and other activities in the food and beverage industries, such as the meat, poultry, and fish industry, the feed industry, and the sugar and confectionary industry.¹⁶

There is a notable overlap between the Sustainable Development Strategy and the State Ownership Policy Document on the important role of the private sector in development. Both also outline the country's agricultural and food policies and highlight the centrality of investment, export, expansion and reclamation of agricultural land, the role of military companies, and the centrality of the private sector. Words such as “farmers” or “agricultural workers” are absent from the strategy, which gives a preliminary idea of the parties involved in the strategic vision and general guidelines and those excluded from them.

What follows presents the relationship between this strategic vision, the legislative system, and the projects implemented on the ground.

15 State Ownership Policy Document, p. 10.

16 State Ownership Policy Document, p. 7.

Agriculture and Food-Related Laws, Decrees, and Agreements

As noted earlier, we aim to highlight the headlines of agricultural and food policies, whether newly set up or redrafted. We will discuss the agreement with the IMF and its influence on economic policies in general and agricultural and food policies in particular. Then, we discuss the laws and procedures that have been key in changing or maintaining the form of agricultural and food policies.

In November 2016, the IMF agreed to extend a USD12 billion loan to Egypt to finance the government's economic reform program. This program included the following measures: 1) reducing public debt from 127% of GDP in 2015-2016 to 80% of GDP by 2020; 2) achieving economic growth that gradually escalates from 4% in 2016-2017 to 6.7% in 2020-2022; 3) reducing the budget deficit by 3.9% by 2020, in addition to increasing foreign investment, raising the rate of exports, reforming the tax system as well as the generalized subsidy system (for food and energy).¹⁷

Following economic reforms, the Egyptian currency lost about 50% of its value, causing an increase in the cost of basic food imports (vegetable oil, corn, and wheat). Energy subsidies were cut, and food prices tripled between 2016 and 2019 due to inflation caused by the floatation shock. Food subsidy systems (the ration system) have also changed from in-kind to financial support. Although the program began in 2014, it was accelerated with the ratification of the agreement with the IMF, and subsidized goods were replaced with cash allocations per capita (50 EGP in 2017). In addition, the authorities set a limit of five loaves per person while the weight of the loaf of bread was reduced, and the food subsidy system was integrated into a unified subsidy system.¹⁸ The implementation of this new policy reduced the subsidy budget, minimizing the leakage and loss across the value

17 Nasser Amer Nasr et al., Egypt's loan from the International Monetary Fund in 1991 and 2016, Between Economic Reform and Shock Therapy: A Case Study of the Arab Republic of Egypt 2016-1991 (قرض مصر) من صندوق النقد الدولي في 1991 و2016 بين الإصلاح الاقتصادي والعلاج بالصدمة: (دراسة حالة جمهورية مصر العربية 1991-2016). Democratic Arab Center for Strategic, Political & Economic Studies. March 2018. <https://democraticac.de/?p=53087> (accessed on 11/7/ 2022).

18 Shirin Al-Shawarbi, Subsidy System for Food Commodities in Egypt (6 منظومة الدعم التمويني للسلع الغذائية في مصر), February 2018, <https://is.gd/4iQGGuO> (accessed on 20/7/ 2022).

Agricultural and Food Projects and Programs

Giant national initiatives and projects are a cornerstone of the design and implementation of the Sisi regime's policies. According to the State Information Service (SIS), national projects are the "main driver of sustainable development". Indeed, Presidential Decree No. 380 of 2015 appointed Engineer Ibrahim Mahlab as Presidential Assistant for Strategic and National Projects.²⁸

Table 1: Some agricultural and food projects that have started since 2014

Project Name	Project Objectives	Implementers/ Beneficiaries	Launch date	Remarks
One-and-a-Half Million Acres Project	Increasing the cultivated area by one and a half million acres. Increasing the inhabited area from 6% to 10%. Increasing Egypt's exports to 10 million tons (current level). Creating 3 million jobs.	Egyptian Countryside Development Company Egyptian and Foreign Investors Graduates and Young Investors	2014	Allocating 75% of the project area to large investors, and 25% for small investors and graduates.
New Delta Project	Reclaiming one million acres by 2024. The New Delta project includes the Future of Egypt and South Dabaa axis projects. Creating new and modern agricultural and urban communities as the basis for modern agriculture and the use of advanced irrigation systems. Relying on groundwater and wastewater desalination plants.	-Air Force -Ministry of Agriculture -National Service Projects Organization -Egyptian and Foreign Investors	2015	It was announced that 1,600 developed axial irrigation devices were used in irrigation. The reclamation of 350,000 acres has been announced ²⁹
Toshka Project	Planting of 485,000 acres Revitalizing the project. Building a palm plantation for export. Developing agricultural industries and exports	-National Company -Egyptian and Gulf Investors	2014	Announcement of the planting of 64,000 acres of wheat during the year 2022 ³⁰ Planting of 1.35 million palms ³¹
100,000 acres of greenhouses project	Increasing vegetable production and export. Meeting export needs of greenhouse products. Achieving vertical agricultural intensification. Establishing integrated agricultural and development communities ³³	Ministry of Agriculture and Land Reclamation -Arab Organization for Industrialization for training on the establishment and operation of modern water-saving greenhouses -Agricultural Investors	2016	In 2019, it was announced that a land of 13,000 acres was equipped with greenhouses, in the Al-Lahun area of Al-Fayyum. ³²

28 Official Gazette, Issue No. 38 (bis), 19 September 2015.

29 Website of the Presidency of the Republic, <https://is.gd/n4mA4q> (accessed on 01/7/ 2022).

30 Masrawy Press Website, <https://is.gd/jv9spa> (accessed on 01/7/ 2022).

31 Akhbarelyom newspaper, <https://is.gd/s9eb6q> (accessed on 03/7/ 2022).

32 Egypt's Projects Map website, <https://is.gd/6k7ZqR> (accessed on 05/7/ 2022).

33 The website of the Al-Ahram newspaper <https://gate.ahram.org.eg/News/1757291.aspx> (accessed 06/7/ 2022).

9 Agricultural and Food Policies in Egypt between 2014 and 2021: What Changed and What Didn't

Fish Farming Project in Ghalioun Pond	Becoming the largest fish farm in the Middle East with an area of 118 km. Achieving self-sufficiency and exporting surplus.	National Company for Fisheries and Aquaculture -General Authority for Fisheries Resources and Development (GAFRD) - China Guangdong Evergreen Group	2014	The \$90 million integrated farms were established through a contract between Guangdong Evergreen Group and the Egyptian military.³⁴ The first phase of the project was launched in 2017 on an area of 3500 acres.³⁵
Food Industrial City "Silo Foods"	Providing healthy and secure meals to school students. Producing some food products to be introduced into the local market and exported. Increasing the supply of baked goods and pasta in the local market and reduce prices.	Public Services Projects Organization	2017	The compound includes 10 different factories with a capacity of 470,000 tons per year and a total of 40 diverse food products. ³⁶
National Silo Project	Building about 50 silos, with an estimated storage capacity of 1.5 million tons, distributed across 17 governorates. Eliminating the quantitative and qualitative loss of grains resulting from their storage in open pits, which amounts to a 15 % loss. Increasing wheat storage capacity to 3.4 million tons, from 1.6 million tons before 2011.	-Arab Contractors Company -The military's Engineering unit -General Authority for Supply Commodities (GASC)	2014	15 silos were established in 2016-2017 by the Arab Contractors. Signing of a contract for the construction of 23 silos with the Danish company Cimbría. ³⁷ Donation received from the UAE. Saudi Loan.

Source: Websites of Egypt's Projects Map, the Presidency of the Republic, and the State Information Service (SIS).

In 2021, the Ministry of Agriculture and Land Reclamation issued an infographic report for the 7th anniversary of President Abdel Fattah al-Sisi's accession to power, entitled: "President Sisi: Seven Years of Achievements, Comprehensive Agricultural Boom (2014-2021)." The report said that during this period, the President completed 320 agricultural development projects for 40 billion EGP.³⁸ On Egypt's Projects Map website, there are 77 agricultural production projects, 91 animal production and fish stock projects, and 124 provisioning projects. However, these projects vary in size, ranging from the opening of a provisioning service center in a village to the implementation of reclamation projects for thousands of acres. In other words, the number of projects does not necessarily reflect their size but is rather an attempt to showcase "achievements".

34 Undercurrent New, <https://is.gd/UhevCk> (accessed on 06/07/2022).

35 Ahmed Zikrallah, information on Ghalyoun Pond Project, Egyptian Institute for studies, 7 December 2017, <https://en.eipss-eg.org/wp-content/uploads/2018/02/information-ghalyoun-pond-project.pdf> (accessed on 08/07/2022).

36 Economyplus economic news website, <https://economy-plusme.com/en/72214/> (accessed on 05/7/ 2022).

37 Cimbría company website, <https://www.cimbría.com/en/about/case-histories/egypt-storage-ch.html> (accessed 08/07/2022).

38

Given the multitude of projects, this section will try to focus on the main ones and provide details about how they work, the actors involved in them and their impact on food and agriculture.

Based on Table 1 and the analytical study of agricultural and food projects, military companies, the private sector and foreign companies have a major role in these national agricultural and food projects. The Human Development Report of 2021 shows that the private sector still accounts for 90% of Egypt's agricultural sector.³⁹ The Executive Director of the Agriculture Export Council confirmed in his statement to Al-Borsa newspaper that the agricultural sector is mostly owned by the private sector and that the major national agricultural projects set by the State are implemented by the private sector, such as the New Delta Project, the Future of Egypt Project, and the One and a Half Million Acres Project. He also added that "only the Greenhouse project is currently directly managed by the State, but it has recently allowed the private sector to obtain rent-based greenhouses for farming."⁴⁰

39 UNDP & the Ministry of Planning and Economic Development, Egypt. Egypt Human Development Report 2021 Development, A Right for All: Egypt's Pathways and Prospects, (2022).

40 Egyptian Al-Borsa newspaper, <https://alborsa.news.com/2022/02/08/1506353> (accessed on 02/7/ 2022).

10 Agricultural and Food Policies in Egypt between 2014 and 2021: What Changed and What Didn't

The presence of state agencies, especially the Ministry of Agriculture, is evident through the participation in agricultural research centers, the Center for Research on Seeds, food industry research centers, animal production sectors of the Ministry, the General Authority for Fish Resources Development, the Council of Grains and Seeds, the Land Research Center as well as through the Ministry of Supply and Internal Trade via the Mills and Consumer Complexes affiliated to it. Furthermore, NGOs supporting poor families and providing food such as the Egyptian Food Bank, Misr El Kheir, and the Orman Association have played a role by contributing to national projects such as the project for the improvement of livestock through the provision of highly productive foreign breeds as a form of support to the rural families most in need.⁴¹

A clear conclusion could be drawn from the projects in Table 1: farmers and agricultural workers are completely absent, with a reliance on “investors,” “military companies” and “state bodies.” The chronology of projects shows that unlike the structure of policy building, which starts with long-term plans and then the legislative and executive infrastructure, all the way to projects and programs, the above projects, initiatives, and programs either began before the issuance of the general plan or that they constitute the focus of the ruling authority’s attention. This is the case for projects and programs in the agricultural and food sector. This raises the question regarding the importance of the general strategy and whether it is merely an afterthought or it does provide an actual framework for these programs and projects.

41 Egypt Human Development Report 2021.

Discussing the Findings:

Discourses and Numbers

It is difficult to conduct an accurate numerical assessment of policies in the absence of transparency and data quality. While collecting data for this study, we noticed that there is a significant discrepancy in the figures between those declared in the President's interviews, the reports on the presidential website, and the National Media Authority on one hand, especially with regard to major national projects, and the reports of the Central Agency for Public Mobilization and Statistics, a highly independent government agency concerned with data production, on the other hand. If, for example, we look at the contribution of agriculture to GDP (Table 2), the figures show a very slight improvement in the contribution of agriculture that is not aligned with talks of a major boom. However, the data on agricultural reclamation (Table 3) shows that there has been a significant improvement over the last four years, but it did not reach "2 million and 86 thousand acres" as some statements and press reports indicate.⁴²

The contribution of the agricultural sector to the gross national product (GNP) remains low despite a slight improvement over the last two years, according to official statistics. Official and more accurate available figures also indicate a decline in self-sufficiency ratios in some staples such as wheat, corn, rice, beans, lentils, and red meat, while there has been an improvement in potatoes, and fresh fruit. The production of milk and eggs remained stable while we noticed a significant rise in citrus. However, maintaining these rates is a positive achievement in light of the increase in population and the subsequent rise in consumption rates. This does not count, however, as a qualitative boom or a recovery in the food industry. Food security stands at about the same rate as that of 2013, with almost the same features (self-sufficiency rates exceed 60%) and the same vulnerabilities, in terms of global prices of cereals, as well as the large boom in export food commodities (horticultural crops).

Table 2: Agriculture's Contribution to the GNP from 1990 to 2021

Years	Contribution of Agriculture, Forestry and Fishing to the GNP
1990	18,51253
2000	15,53808
2012	11,27277
2013	11,27435
2014	11,3377
2015	11,39406
2016	11,76932
2017	11,48529
2018	11,225
2019	11,04898
2020	11,56761
2021	11,83151

Source, World Bank <https://is.gd/8Qwslz>

Table 3: Agricultural Reclamation Areas from 2009 to 2020

Years	Reclaimed area in thousand acres
2008/2009	36.4
2009/2010	14.7
2010/2011	15.5
2011/2012	39
2012/2013	22.9
2013/2014	22.6
2014 / 2015	14.5
2015 / 2016	38.5
2016 / 2017	38.9
2017 / 2018	59.2
2018 / 2019	115.7
2020/2019	81

Source: Report on Land Reclamation 2018/2019 & Egypt in Figures 2022, Central Agency for Public Mobilization and Statistics.

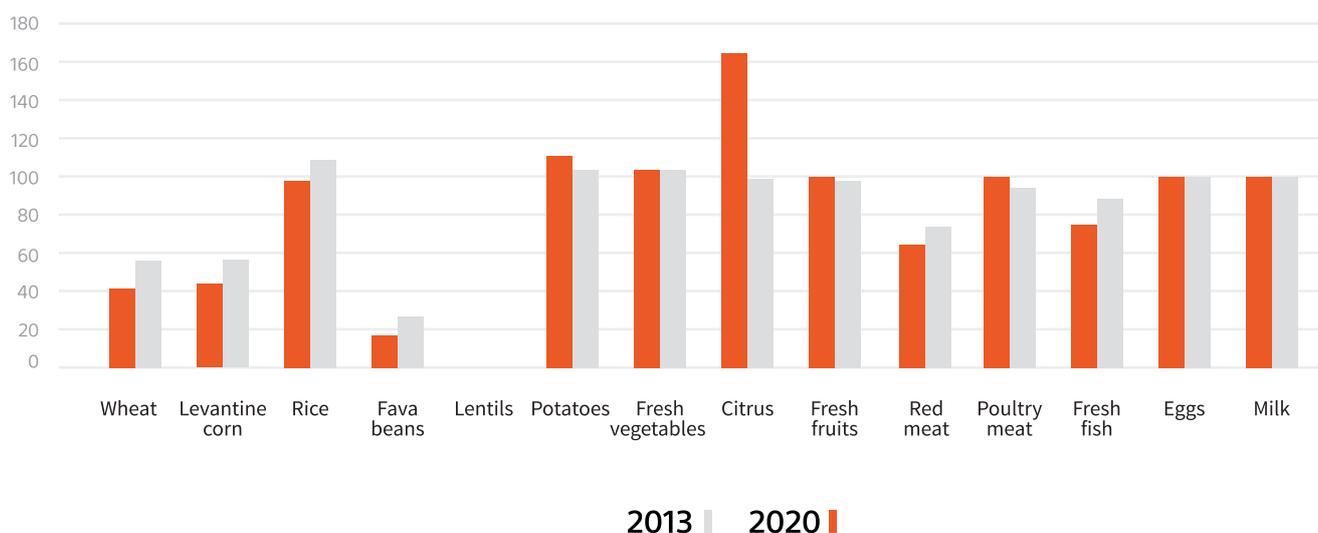
42 See for example, the report published by Youm7, <https://is.gd/4jHNeK> (accessed on 17/7/ 2022).

12 Agricultural and Food Policies in Egypt between 2014 and 2021: What Changed and What Didn't

Table 4: Self-sufficiency in some Basic Food Commodities between 2013 and 2020

Food commodities	2013	2014	2016	2017	2018	2019	2020
Wheat	56.7	52.1	47.7	34.5	35.5	40.3	41.4
Levantine corn	56.8	65.1	56.3	47.0	50.5	51.1	44.8
Rice	108.8	100.4	99.7	94.2	90.7	76.2	98.1
Fava beans	27.8	33.8	20.0	30.7	12.4	10.5	17.3
Lentils	0.8	1.3	2.1	1.8	1.1	0.5	0.0
Potatoes	103.4	112.6	105.4	116.3	111.4	117.1	111.1
Fresh vegetables	103.6	103.1	103.4	103.0	102.7	105.5	103.5
Citrus	142.8	125.6	149.9	156.5	171.7	203.6	164.4
Fresh fruits	97.8	99.2	89.4	99.3	100.7	99.0	100.6
Red meat	74.3	71.9	64.6	55.9	48.8	55.0	46.5
Poultry meat	94.1	94.8	93.7	91.5	96.5	96.4	99.8
Fresh fish	88.9	...	89.7	85.6	79.5	79.6	75.6
Eggs	100.0	100.0	100.2	100.0	100.2	99.9	100
Milk	100.0	100.1	100.0	100.2	100.2	99.2	100.5

Source: Egypt in Figures 2022 & Egypt in Figures 2016, Central Agency for Public Mobilization and Statistics.



Finally, against the backdrop of confusion in local food markets and food supply shortages as consequences of the Covid-19 pandemic and the Ukraine war, Egypt was forced to quickly obtain a loan from the World Bank⁴³ to buy food and undertook measures to force farmers to hand over wheat.

All of this suggests that official reports and the official gazette do not paint an accurate picture when they confirm the achievement of a “complete agricultural boom”⁴⁴ and self-sufficiency. Thus, it cannot be said that agricultural and food

policies have succeeded in solving food and agricultural problems and resolving the vulnerabilities of the Egyptian agricultural and food system. These policies have certainly brought about significant changes in the transfer and use of natural resources. Over the past eight years, the ownership of millions of acres has been transferred from the State to the private sector, foreign investors, and military companies. Water resources have been depleted in favor of export projects such as in Toshka and Owaynat.⁴⁵ The depletion of resources threatens not only the near future but also the rights of future

43 Ministry of International Cooperation, <https://moic.gov.eg/ar/news/573> (accessed on 18/7/ 2022).

44 For example, see al-Ahram website <https://is.gd/cOKXnq> (accessed on 19/7/ 2022).

45 Jamal Asmar, the Great Wall of Toshka: What the Army has added to large-scale agricultural production (سور توشكى العظيم: ما أضافه الجيش لمنمط الإنتاج الزراعي الكبير), Almanassa, <https://almanassa.com/stories/4982> (accessed on 06/10/ 2022).

13 Agricultural and Food Policies in Egypt between 2014 and 2021: What Changed and What Didn't

generations and the sustainability of resources, especially in the case of the significant depletion of Nile water and non-renewable groundwater in many areas.⁴⁶

About what changed and what did not, we note here that Egypt's agricultural and food policies are similar, in a way, to those implemented in the Mubarak era. If we compare the outlines of current policies with the Egyptian Agriculture Strategy 2030, which was produced in 2009, we find that they intersect around the following axes of achieving food security:

1. Horizontal expansion, by adding new land in light of the available water resources.
2. Vertical expansion, through the use of highly productive varieties and expansion of protected agriculture.
3. Supporting investments in the agricultural sector.
4. Increasing the competitiveness of agricultural exports.
5. Supporting livestock, poultry and fish production.

Export policies and large and very large production known as the California model (large farms with high technology and energy usage, destined for export agriculture) are the basis of the agricultural policies implemented in the Mubarak era. This model remains the model of choice for the Egyptian ruling authority, despite the criticism it faces in its ability to operate or solve agricultural issues, its creation of environmental crises, and its depletion of energy, water, and land.⁴⁷ What is also evident through the intersection with the large production model is the support of big Egyptian and foreign investors, especially Gulf investors, and the facilitation of their acquisition of resources. This shows continuous advances by Gulf investments in Egyptian agriculture that began in the Mubarak era, which has been made possible through the continuation of previous contracts and the signing of new ones and the allocation of large areas of land to them.

Another aspect of the continuity of these policies from one era to another relates to the unified food subsidy system, which is an old project that began with the Nazif government. Dr Ali El-Moselhi who was the Minister of Social Solidarity at the time contributed to developing this policy. He is now the Minister of Supply and Internal Trade. On his website, Dr El-Moselhi defines his role in Nazif's government, saying: "Since 31 December 2005, Dr Ali El-Moselhi has served as Minister of Social Solidarity and has been responsible for drawing up the National Plan for the Development of Safety Networks and Optimization of Subsidies."⁴⁸ This policy is also linked to

the recommendations of international institutions and the economic reform program that began in 1990 and continues to this day.

Another form of this continuity is manifest in existing agricultural and food projects and programs that are an extension of previous projects such as the Toshka and East Owaynat project, the West Delta projects, and the new Sinai and Wadi reconstruction projects. In addition, the silo project began in 2012 after a loan agreement between Egypt and the Saudi Fund for Development (SFD)⁴⁹ to establish 22 silos. UAE support was then obtained to complete 50 silos, and the project is still under implementation.

We have noticed another feature of continuity in agricultural and food policies, which is that they "exclude farmers." Agricultural policies since the beginning of Sadat's reign have blatantly excluded small-scale agricultural production. This trend was demonstrated by the State's focus on projects that cover large areas and large agricultural reclamation in the desert. Also linked to the absence of "farmers" from plans and projects is the exclusion of rural areas from the strategies, plans, and projects for the development of agricultural production. Rural areas were, however, included in social projects (for the provision of a decent life) or projects for the provision of water for exploitation elsewhere (lining canals). This perpetuates agricultural policies that exclude farmers and rural development policies that exclude agriculture, which represents a continued trend that began with the neoliberal transformation of Egyptian agriculture in the Sadat and Mubarak eras.⁵⁰

On the other hand, many changes to agricultural and food policies took place, perhaps the most important of which is the emergence of the role of military companies and their increased involvement in agricultural and food projects. The National Service Projects Organization is engaged in:⁵¹

- 12 projects of the National Company for Animal Production.
- 8 projects of the National Company for Land Reclamation and Agriculture
- 2 projects of the National Company for Fishery and Aquaculture
- 5 projects of the National Company for Protective Cultivations

46 Nada Arafat and Sakr Al-Noor, "How Egypt's Water Feeds the Gulf", Mada Masr <https://www.madamasr.com/en/2019/05/15/feature/politics/how-egypts-water-feeds-the-gulf/> (accessed on 05/10/ 2022).

47 Sakr Al-Noor, "The Farmer and the Investor: A Study on the Agricultural and Farmer Issue in Egypt" (دراسة في المسألة) الأرض والفلاح والمستهلك "دراسة في المسألة" (الفلاحين والزرعية والفلاحية في مصر) Dar Elmaraya, 2017.

48 Dr. Ali El-Moselhi's Website, <https://is.gd/OAWM8Q> (accessed on 01/7/ 2022).

49 Egypt builds 22 metal silos to reduce wheat waste (22 مصر تبني صومعة معدنية لتقليل هدر القمح <https://is.gd/o8FcGs> (Accessed on 01/7/ 2022).

50 For more details see: Sakr Al-Noor, "Rural and Agricultural Development Policies in Egypt: Their Historical Paths and Their Impact on Peasants" (سياسات التنمية الريفية والزراعية في مصر مساراتها التاريخية وأثرها في) (الفلاحين), Omran Journal of Social Sciences and Humanities, Issue No. 10, Volume 3, Fall 2014.

51 Website of the Presidency of the Republic, <https://is.gd/Ts0rB0> (Accessed on 25/7/ 2022).

14 Agricultural and Food Policies in Egypt between 2014 and 2021: What Changed and What Didn't

- 4 projects of the Egyptian National Company for Agricultural Projects and Supplies
- 2 projects for Upper Egypt Company for Agricultural Industry and Land Reclamation.
- Glion project for fish production.

Although agricultural reclamation activity carried out by the military dates back to the July Government,⁵² the last seven years have seen an expansion of the role of the military, especially in land reclamation. The army's website indicates that the projects being implemented through the organization exceed 1.859 million acres.

Agricultural and food policies are also characterized by direct presidential supervision, personal follow-up from the president, intervention in the timetable, and step-by-step follow-up. Also associated with this new aspect is the accelerated timeline. The president intervened multiple times during the presentation of the timetable by the implementing party, requesting that it be expedited, and that the delivery date be advanced.⁵³ This action reflects how the president and his closest circle have full control of national

projects. Furthermore, no feasibility studies were conducted and the narrow spaces for discussion that were available in previous eras before the implementation of projects were shut down. This was the case for the Toshka Project in the 1990s, for example, where the objections of researchers such as Dr Rushdi Al-Said appeared in national newspapers such as Al-Ahram.⁵⁴ Newspapers such as Al-Ahly, Al-Wafd, Al-Masry Al-Youm and Al-Shorouk used to publish reports and investigations that sometimes criticized the State's public plans and projects, but this does not happen anymore. This expedited pace for project implementation raises a lot of concerns about their economic and social feasibility and environmental impacts, especially with the president assuring that if the feasibility studies had been undertaken no more than 25% of the projects would have been implemented.⁵⁵ Environmental impacts, the wasting of our water resources, and the privatization and commodification of land and water not only threaten current agricultural and food systems but also the sustainability of resources and the future of younger generations.

52 Yazid Sayegh (2019). Owners of the Republic: An Anatomy of Egypt's Military Economy. Carnegie Middle East Center, Beirut. <https://carnegie-mec.org/2019/11/18/owners-of-republic-anatomy-of-egypt-s-military-economy-pub-80325>

53 See, for example, Jamal Asmar, "The Great Wall of Toshka", <https://www.almasryalyoum.com/news/details/2603222> (accessed on 23/7/ 2022).

54 Dr Rushdi Al-Said, "Egypt and its Natural Resources: The Extent of Wisdom in the Management of its Natural Resources", Partners Forum, Issue No 18, 1 March 2009, Development Partners in Research, Consulting and Training, Cairo. (مصر وثرواتها الطبيعية مدى الحكمة في إدارة مواردها الطبيعية). منتدى الشركاء، العدد 18، 1 مارس 2009، شركاء التنمية للبحوث والاستشارات والتدريب، القاهرة)

55 Masrawy Website, <https://is.gd/ee8Kh1> (accessed on 25/7/ 2022).

Conclusion

Agricultural and food policies in Egypt are usually determined by the State and the market. Since Sisi took office, the military has become a third party in this equation, not as a replacement for the market and the private sector, but as a participant in benefit-sharing. The market, the private sector, and influential investors are still key players in Egypt's food and agricultural policymaking, but the impacts of the global market contribute to influencing the structure of the Egyptian agricultural and food system. Egypt remains the world's largest importer of wheat, and also depends on the global market to provide a major part of its needs of sugar, oils, and corn, in addition to importing inputs for food industries and agricultural production. On the other hand, international organizations influence the policies adopted by the State, where donors and international financial organizations such as the European Union and the World Bank as well as international aid agencies, especially USAID, play a key role in agricultural policymaking. Farmers, small-scale food producers, and food industry workers remain completely invisible in these strategies, plans, programs, and decisions, despite their central role in food production.

The role of citizens is also limited, as they are usually treated as a "burden" or as service recipients or consumers (customers). So far, civil society action accepted by state agencies has been limited to providing food assistance to the needy or supporting rural breadwinners by providing them with cows. These civil efforts, although significant, do not affect the format of the existing agricultural and food system

but contribute to the sustainability of the existing structural imbalance by mitigating its social impacts.

In this context, one recommendation would be for agricultural and food policies to adopt the idea of food sovereignty as a frame of reference, and eco-agriculture methods as a procedural tool for the development of sustainable agricultural and food policies. Food sovereignty enshrined in the current Egyptian Constitution in Article 97 states that "every citizen has the right to healthy and sufficient amounts of food and clean water. The State shall provide food resources for all citizens. It also ensures food sovereignty in a sustainable manner and guarantees the preservation of agricultural biodiversity and native plant varieties to preserve the rights of generations." Regenerative ecological agriculture is a more viable approach to helping key food producers, who are small-scale farmers, to increase production, meet food needs, revive their natural and agricultural environment, and achieve resource sustainability and renewal.

This requires the support of an independent agricultural cooperative movement, as it represents an important element in building ecological agriculture and achieving food sovereignty. Independent agricultural cooperatives represent a space for democratic action, mutually beneficial partnerships, and the exchange of knowledge, information and practices. All of these factors are necessary to broaden the scope of this experience and disseminate it. The trade unions of agricultural workers and consumer associations allow for the expansion of the scope of participation and solidarity, and the adoption of a concept of food and agriculture that goes beyond the narrow concept of market, benefit, interest, and consumerism.

16 Agricultural and Food Policies in Egypt between 2014 and 2021: What Changed and What Didn't

Appendix 1: Key Actors involved in Agricultural and Food Policies in Egypt between 2014 And 2022.

Legislative and Executive Bodies

- Presidency of the Republic
- Council of Ministers
- Ministry of Agriculture and Land Reclamation
- Public Service Projects Organization of the military
- Ministry of Water Resources and Irrigation
- Ministry of Planning
- Ministry of Finance
- Ministry of Supply
- Parliament (Agriculture Commission)
- National Food Safety Authority

Lobbyists

- Media
- Civil society (charities: Orman, Resalah, Misr El Kheir... etc)
- Consumer protection associations
- Horticultural Export Improvement Association (HEIA)
- Agricultural Export Council

International Organizations and Donors

- World Bank
- IMF
- FAO
- International Food Policy Research Institute (IFPRI)
- USAID
- Dutch cooperation
- Japanese International Cooperation Agency

Private Sector

- Private international agricultural and food companies
- Private local agricultural and food companies
- Food processing companies

17 Agricultural and Food Policies in Egypt between 2014 and 2021: What Changed and What Didn't

Appendix 2: Key Laws Related to Agriculture and Food Issued between 2014 and 2022

Law Number	Date of enactment	Subject	Status
13	2014	Replacing Article (125) of the Agriculture Law No. 53 of 1966	In force and amended
23	2014	Amending some provisions of Law No. 31 of 1966 establishing the Agricultural Professions Trade Union.	In force and amended
127	2014	Regarding the organization of health insurance for farmers and agricultural workers.	* Repealed by Law No. 2 of 2018 on the Comprehensive Health Insurance System.
126	2014	Regarding the establishment of the Agricultural Solidarity Fund (ASF), by setting up a fund called the "Agricultural Solidarity Fund" in the Ministry of Agriculture and Land Reclamation as an independent legal entity, with its headquarters in Greater Cairo, and the authorization to establish branches in the governorates.	In force
204	2014	Amending some provisions of the Agricultural Cooperation Law No. 122 of 1980.	In force and amended
4	2015	Amending some provisions of Law No. 210 of 1994 on the Regulation of Local Cotton Trade, by adding to the first article two new paragraphs stipulating the following: Cotton meant for propagation shall not be subject to the provisions of the accompanying law, and its trade shall be carried out exclusively through the Ministry of Agriculture and Land Reclamation. A decision will be issued annually by the Minister of Agriculture and Land Reclamation specifying these kinds of cotton and the conditions and procedures for their trade.	In force and amended
14	2015	Regarding the establishment of a contract farming center. Contractual agriculture is the agricultural, animal, poultry or fish production carried out based on a contract between the producer and the buyer under which the producer is obliged to supply in accordance with the quantities, varieties, quality, price, and other conditions contained in the contract.	In force
103	2015	Regarding its replacement with the text of Article (16) of Law No. 48 of 1982 on the protection of the Nile River and waterways from pollution.	In force and amended
102	2015	Regarding the replacement of the texts of articles Nos. (91, 90, 93, 92) of the provisions of the Irrigation and Drainage Law promulgated by Law No. 12 of 1984 with the following texts after.	In force and amended
105	2015	Regarding the amendment of some provisions of the Environmental Law promulgated by Law No. 4 of 1994.	In force and amended
84	2016	The Principal Bank for Development and Agricultural Credit shall be transformed into a public sector bank called the Agricultural Bank of Egypt in the form of an Egyptian joint stock company wholly owned by the State. It shall have an independent legal personality and its head office shall be located in Greater Cairo. It shall be given all the rights of the Principal Bank for Development and Agricultural Credit and shall assume its responsibilities.	In force
71	2016	Article 2 of Law No. 212 of 1959 on the Establishment of the Egyptian Cotton Improvement Fund shall be replaced by another text.	In force and amended
1	2017	Promulgating the Law of the National Food Safety Authority.	In force

18 Agricultural and Food Policies in Egypt between 2014 and 2021: What Changed and What Didn't

143	2017	Regarding the suspension of Law No. 113 of 1939 relating to the tax on agricultural land.	In force
7	2018	Regarding the amendment of some provisions of the Agriculture Law No. 53 of 1966.	In force and amended
34	2018	Regarding the amendment of some provisions of the Agriculture Law No. 53 of 1966.	In force and amended
14	2019	Amending some provisions of Law No. 38 of 1976 on the improvement and maintenance of agricultural land.	In force and amended
15	2019	Amending some provisions of Decree-Law No. 95 of 1945 on Supply Issues and some provisions of the Law on the Protection of Competition and the Prevention of Monopolistic Practices Law No. 3 of 2005.	In force and amended
147	2020	Regarding the extension of the period of suspension of the application of Law No. 113 of 1939 on the tax on agricultural land.	In force
168	2020	The Minister of Finance, on behalf of the Government of the Arab Republic of Egypt, is authorized to sponsor the Holding Company for Drinking Water and Wastewater and its subsidiaries in the loans and financing they obtain worth 3billion EGP, to ensure the fulfillment of the financial obligations arising from them for the projects it contracts for desalination in the areas of Al-Hammam in Matrouh Governorate, as well as in Safaga, El-Qoseir, and Marsa Alam in the Red Sea Governorate, and to contract their implementation through or with the participation of the private sector according to the terms and conditions determined by the Minister of Finance.	In force
11	2020	Regarding the authorization of the Minister of Finance to sponsor the holding company for cotton, yarn, textiles and clothing.	In force
15	2022	Regarding the amendment of certain provisions of Decree-Law No. 178 of 1952 on agricultural reform.	In force
12	2020	Regarding organic agriculture.	In force and amended
202	2020	Promulgating the Law on organizing the Waste Management Regulatory Authority (WMRA).	In force
146	2021	Regarding the promulgation of the Law on the Protection and Development of Lakes and Fisheries.	In force
147	2021	Regarding the promulgation of the Water Resources and Irrigation Law.	In force
140	2021	Regarding the amendment of some provisions of Law No. 106 of 1973 regarding certain provisions related to cotton.	In force
17	2022	Regarding the amendment of some provisions of Law No. 106 of 1973 concerning certain provisions on cotton and the repeal of Law No. 212 of 1959 on the establishment of the Egyptian Cotton Improvement Fund in Egypt.	In force
152	2022	Regarding the extension of the period of suspension of the application of Law No. 113 of 1939 regarding the tax on agricultural land.	In force

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About the Arab Reform Initiative

The Arab Reform Initiative is an independent Arab think tank working with expert partners in the Middle East and North Africa and beyond to articulate a home-grown agenda for democratic change and social justice. It conducts research and policy analysis and provides a platform for inspirational voices based on the principles of diversity, impartiality, and gender equality.



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