

付属資料 8. 作物別単位用水量

標準単位用水量 (Crop Consumptive Use)

対象作物 (Crop)

1. 大麦 (bariey)
2. 柑橘 (citrus)
3. クローバー FULL (clover, full)
4. クローバー SHORT (clover, short)
5. 綿花 (cotton)
6. 亜麻 (flax)
7. 果物 (fruits)
8. 落花生 (ground nuts)
9. HORSE BEANS
10. その他豆類 (legums, other)
11. レンズ豆 (lentils)
12. トウモロコシ NILI (maize, nili)
13. トウモロコシ 夏作 (maize, nili)
14. 玉葱 夏作 (onion, summer)
15. 玉葱 冬作 (onion, winter)
16. その他 冬作 (others, winter)
17. その他 NILI (others, nili)
18. その他 夏作 (others, summer)
19. ジャガイモ 夏作 (potato, summer)
20. ジャガイモ NILI (potato, nili)
21. 稲直播き (rice, direct seeded)
22. 稲田植え (rice, transplant)
23. 胡麻 (sesame)
24. ソルガム (sorgum)
25. 大豆 (soybeans)
26. サトウキビ (sugar cane)
27. トマト NILI (tomatoe, nili)
28. トマト 夏作 (tomatoe, summer)
29. トマト 冬作 (tomatoe, winter)
30. その他野菜 夏作 (vegetables, other summer)
31. その他野菜 nili (vegetables, other nili)
32. その他野菜 冬作 (vegetables, other winter)
33. 小麦 (wheat)

上エジプト (Upper Egypt)

単位 : mm/月

作物 (Crop)	1月	2月	3月	4月	5月	6月	7月	8月	9月	10月	11月	12月
1.	75.9	101.9	125.9	116.9							21.9	69.0
2.	50.9	63.1	84.0	140.0	140.0	159.0	159.0	151.9	126.9	100.9	63.1	50.9
3.	65.0	100.0	149.0	166.9	140.0						58.1	65.0
4.	65.0	95.0									58.1	65.0
5.	103.1	125.0	148.1	149.0	233.0	118.1						
6.	95.0	100.0	65.0								35.0	65.0
7.			79.0	111.9	119.0	126.9	151.9	170.9	168.1	113.1		
8.				70.0	130.0	150.0	160.0	50.0				
9.	74.0	101.9	124.0								58.1	73.1
10.	105.0	90.0	55.0								35.0	90.0
11.	100.0	100.0	70.0								40.0	75.0
12.							63.1	169.0	194.0	135.9	25.9	
13.					58.1	164.0	238.0	175.0	33.1			
14.				60.0	110.0	140.0	170.0	165.0	60.0			
15.	75.0	89.0	110.9	90.0								45.0
16.	100.0	95.0	65.0									30.0
17.						25.9	131.9	115.9	18.1			
18.					50.9	141.9	154.0	151.9	125.9			
19.		58.1	124.0	164.0	143.1							
20.	114.0									31.9	69.0	116.9
21.												
22.												
23.					48.1	160.0	188.1	80.0				
24.						101.9	191.9	229.0	131.9			
25.					160.9	268.0	251.9	53.1				
26.	84.0	99.0	136.9	241.9	261.9	304.0	295.9	250.0	200.9	139.0	93.1	61.9
27.	114.0									31.9	69.0	116.9
28.		58.1	124.0	164.0	143.1							
29.	45.0							15.9	78.1	109.0	109.0	85.9
30.		4.0	21.9	34.0	61.9	165.9	103.1	48.1	44.0	46.9	28.1	
31.						6.0	26.9	66.9	104.0	89.0	71.9	50.9
32.	28.1	15.9	16.9	14.0				6.9	50.0	94.0	89.0	68.1
33.	75.9	101.9	135.9	116.9							21.9	69.0

中エジプト (Middle Egypt)

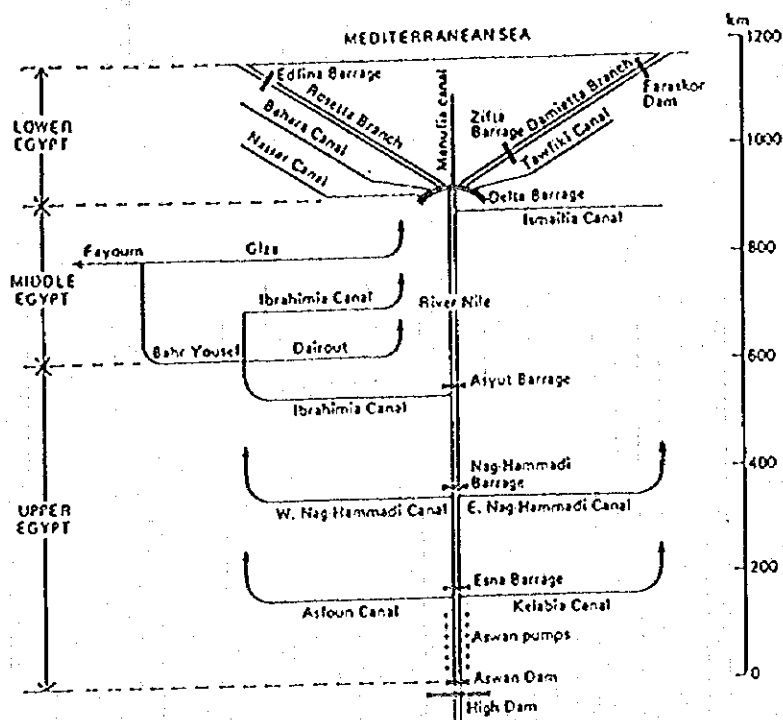
単位 : mm/月

作物 (Crop)	1月	2月	3月	4月	5月	6月	7月	8月	9月	10月	11月	12月
1.	63.1	78.1	133.1	115.9	16.9						11.0	58.1
2.	48.1	60.0	84.0	134.0	143.1	149.0	149.0	144.0	120.0	95.9	60.0	48.1
3.	59.0	84.0	129.0	158.1	130.9						55.0	61.9
4.	59.0	84.0									55.9	61.9
5.			30.0	93.1	157.8	195.0	218.1	101.9	50.0			
6.	85.0	90.0	35.0								45.0	80.0
7.			70.9	106.9	114.0	124.0	143.1	161.9	156.9	108.1		
8.				55.0	100.0	125.0	120.0	45.0				
9.	65.0	71.9	119.0	24.0							34.0	59.0
10.	80.0	80.0	45.0								50.0	90.0
11.	85.0	85.0	35.9							14.0	48.1	90.0
12.							60.0	158.1	179.0	125.9	26.9	
13.					49.0	151.9	224.0	161.9	35.0			
14.				60.0	110.0	140.0	170.0	165.0	60.0			
15.	76.9	85.9	109.0	76.9								51.9
16.	80.0	90.0	50.0									45.0
17.							25.0	120.0	99.0	18.1		
18.					35.0	124.0	145.0	128.1	113.1	26.9		
19.		50.0	108.1	148.1	140.0							
20.	90.0									29.0	59.0	99.0
21.					35.9	214.0	306.8	646.8	339.0	88.1		
22.					5.0	30.9	306.8	346.8	339.0	88.1		
23.					45.9	156.9	178.1	75.0				
24.						101.9	191.9	229.0	131.9			
25.					136.9	225.0	211.9	41.9				
26.	46.9	70.0	101.9	123.1	170.9	183.1	205.0	225.9	213.1	164.0	129.0	74.0
27.	90.0									29.0	59.0	99.0
28.		50.0	108.1	148.1	140.0							
29.	36.9							11.9	63.1	69.0	105.0	100.8
30.		3.1	20.9	18.1	40.9	80.0	100.0	51.9	41.9	45.9	29.0	18.1
31.						5.0	24.0	61.9	95.9	81.9	65.9	46.9
32.	29.0	29.0	15.9	13.1				6.0	41.9	80.0	85.9	66.9
33.	63.1	78.1	133.1	115.9	16.9						11.0	58.1

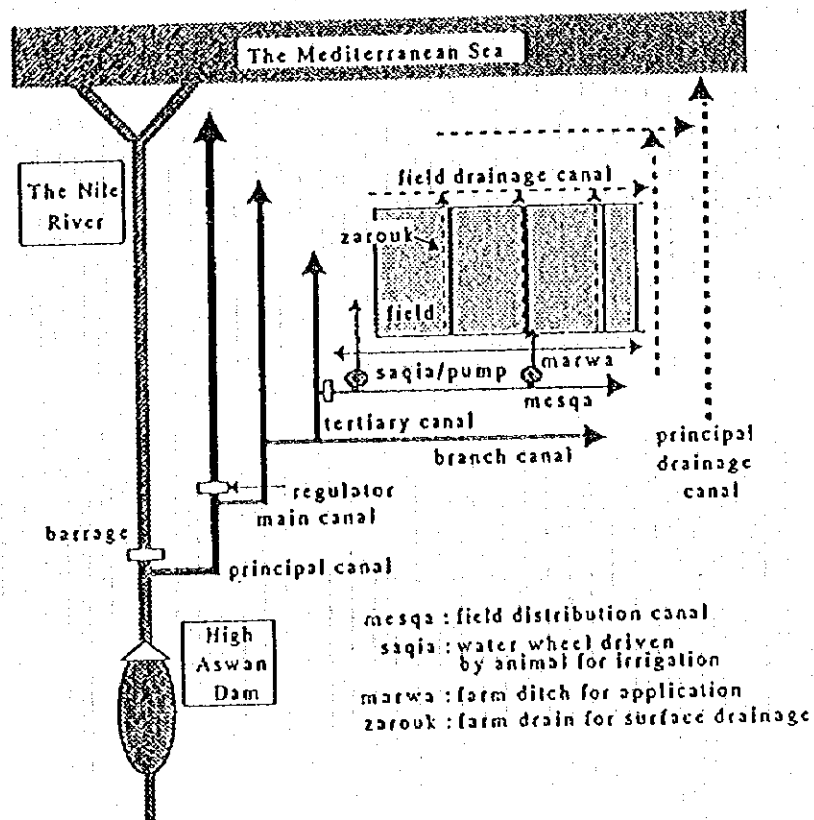
下エジプト (デルタ) (Lower Egypt(Delta))

単位 : mm/月

作物 (Crop)	1月	2月	3月	4月	5月	6月	7月	8月	9月	10月	11月	12月
1.	42.8	55.0	95.9	105.0	34.0						6.9	44.0
2.	46.9	58.1	81.9	129.0	129.0	145.9	145.9	140.0	116.9	93.1	58.1	46.9
3.	53.1	63.1	94.0	141.9	116.9						44.0	50.0
4.	53.1	63.1									44.0	50.0
5.			26.9	55.0	123.1	154.0	176.9	91.9	43.1			
6.	85.0	90.0	35.0								45.0	80.0
7.			76.9	104.0	108.1	120.9	138.1	154.0	150.0	104.0		
8.				55.0	100.0	125.0	120.0	45.0				
9.	49.0	69.0	90.0	42.8							13.1	40.9
10.	80.0	80.0	45.0								50.0	90.0
11.	45.0	85.0	35.9							14.0	48.1	90.0
12.							59.0	164.0	175.9	110.9	25.9	
13.					48.1	133.1	200.9	165.0	31.9			
14.				60.0	105.0	140.0	160.0	155.0	55.0			
15.	76.9	75.9	109.0	76.9								51.9
16.	80.0	90.0	50.0									45.0
17.							21.9	114.0	90.0	11.9		
18.					33.1	115.0	128.1	101.9	98.1	16.9		
19.		50.0	98.1	148.1	138.1							
20.	83.1									29.0	50.0	88.1
21.												
22.							306.8	346.8	339.0	88.1		
23.					45.0	150.0	165.0	70.0				
24.												
25.					110.9	195.0	139.0	35.9				
26.	46.9	70.0	101.9	123.1	170.9	183.1	205.0	225.9	213.1	164.0	129.0	74.0
27.	83.1									29.0	50.0	88.1
28.		50.0	98.1	148.1	138.1							
29.	76.9								25.0	85.0	100.9	98.1
30.			11.0	64.0	81.2	95.9	70.0	41.9	45.0	28.1	16.9	
31.							9.0	51.9	100.0	93.1	69.0	44.0
32.	51.9	29.0	15.9	13.1					20.0	68.1	54.0	71.9
33.	42.8	55.0	95.9	105.0	34.0						6.9	44.0



エジプトの基幹灌漑システムの構造概念図 (Abu-Zeid, 1989b)



エジプトの灌漑排水システムにおける水路構成概念図

付属資料9. エジプト農業概要 (米国大使館)

AMERICAN EMBASSY

CAIRO, EGYPT

AGRICULTURAL SITUATION

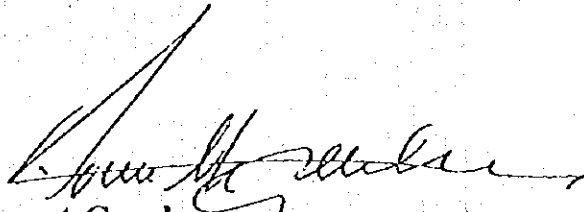
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General Summary

According to the Central Bank of Egypt, real GDP growth in FY 1993/94 was 3.6 percent, up from 1.5 percent in 1992/93. However, more conservative estimates continue to place the figure closer to 2 percent. The latest projections for FY 1994/95 range from the official estimate of 6 percent to more modest projections of 2.0-2.5 percent. Although the recent spate of activity in some sectors, most notably real estate, construction and agriculture, is encouraging, tight government fiscal policy, high interest rates, unsettled foreign exchange markets, and limited private sector activity are likely to constrain growth rates into the foreseeable future.

The government's strong commitment to fiscal stringency has been a major element in its successful stabilization program. From a high of 17 percent of GDP in FY 1990/91 (year ends in June), Egypt has slashed its budget deficit to 4.7 percent of GDP in FY 1992/93 (excluding earthquake relief), 2.8 percent in FY 1993/94, and a projected 1.5 percent for FY 1994/95. Although the government did agree to a 15 percent wage increase for the public sector in 1995, it still is expected to achieve its GDP target for the year.

A significant upswing in Egypt's economic growth anticipated at the start of 1995 was predicated on an acceleration of the government's structural reform program and on continued improvements in the macroeconomic situation. However, the desultory nature of the economic reform program evident in 1994 has led some observers to argue that the program has stalled. As a result, government actions, particularly with regard to privatization and trade liberalization, continue to be closely monitored by investors both at home and abroad. Inflationary pressures, extremist violence and political considerations, including the 1995 elections, could contribute to a delay in the implementation of promised reforms.

Economic growth in 1995 and beyond still depends greatly on Egypt's ability to create an economic climate conducive to private sector activity. The government is expected to remain firm in its commitment to maintain the current pound/dollar exchange rate, although modest corrections to improve Egypt's export competitiveness cannot be ruled out. Absent pressure on the Egyptian pound, interest rates should head downwards, causing

a large expanding population have combined to make Egypt dependent on imports for about one half of its total food requirement. Wheat, corn, vegetable oils, meat and dairy products are the principal commodities imported. Although Egypt benefited from its sixth consecutive year of expanded wheat production, imports and consumption have begun to dip somewhat, a function of higher international prices and lower domestic incomes. The U.S. is by far the largest supplier of food and feed grains to Egypt at this time.

Egyptian agricultural trade marked noticeable increases in 1994 compared to 1993. The value of both imports and exports rose. Agriculture's share of total trade also was higher compared to the year before, approximately 51% of total imports, as compared to 37% in 1993, and about 14 percent of all exports, compared to 12 percent in 1993. Imports of agricultural products from the U.S. also were up, preliminary indications suggesting a total close to \$850 million on the strength of higher imports of wheat and corn.

Egypt has made good progress in liberalizing its trade regime, but the domestic industry remains protected by high tariffs and non-tariff requirements. A major government objective is to encourage agricultural production for export in order to improve the national balance of trade and balance of payments. A decree issued in 1993 removed many export restrictions which should eventually benefit rice producers among others.

Consumer prices are determined by market forces for all commodities save three: vegetable oils, sugar and bread. The first two are mainly distributed under a ration card system to about 90% of the population at subsidized prices. Most food items available through government's outlets still tend to be cheaper, of a higher quality and in greater supply than comparable products sold in private sector stores at market prices. Several important factors worked to increase the market price for food stuffs in both 1994 and in 1995. These include a relatively high inflation rate (10-11%), the impact of Uruguay Round concessions on import prices, at least in the short run, and a Ministry of Economy decision not to allow any food item to enter the country unless 50% or more of its declared shelf life still remains at the time it is submitted for inspection by customs authorities.

I- Situation and Outlook for the Economic Sector

of structural reform, slowed significantly in 1994. A renewed demonstration of the government's commitment to broad economic reform will spur economic recovery in 1995 and contribute to creation of a climate which encourages sustained growth.

Egypt's reform program encompasses all major areas of economic activity including financial activities and foreign exchange, trade liberalization, public sector reform and privatization, and price and investment deregulation. Although important reforms have indeed been implemented, particularly in the areas of financial liberalization, trade reform and investment and pricing decontrol, serious shortfalls, in other key areas, notably in the privatization program and deregulation, slowed the reform program significantly in 1994. Success in achieving sustainable economic growth in 1995 depended greatly on an acceleration of the reform process, which has not necessarily occurred.

In the financial and banking sector, banking regulation and control has been strengthened dramatically since 1991: provisions for dealing with weak banks have been increased and foreign currency reserve requirements have been reduced. Egypt has eliminated exchange controls, unified its two-tier exchange system, and opened the exchange market to nonbank dealers. Local branches of foreign banks may now conduct Egyptian pound (LE) operations; six have obtained licenses to do so. Four new mutual funds, all managed by local banks, have begun operations; licenses for two other funds are pending. A new Foreign Exchange bill, passed in 1994, formalized many of these changes.

Egypt has made progress in liberalizing its trade regime, but the domestic industry remains protected by non-tariff import requirements and relatively high tariff rates. A three year trade reform program, announced in July, 1993, called for the lifting of nearly all import bans, most tariff preferences, and the elimination of non-tariff barriers. The government has ended the import ban list for all products except textiles, apparel, and poultry. Since 1993, it has reduced maximum tariff rates from 100 percent to 70 percent; the next phased reduction occurred on January 1, 1995. Commodities such as alcohol, tobacco, and passenger cars, are exempt from the ceiling.

Privatization is an essential element in the government's structural reform program; however, progress has been limited.

I- Situation and Outlook for the Economic Sector

sensitivities and foot dragging on privatization and liquidation.

Growth Rates: According to the Central Bank, real GDP growth was 3.6 percent in FY 1993/94, up from 1.5 percent in FY 1992/93. More conservative estimates place that figure closer to 2 percent. Projections for FY 1994/95 range from the official estimate of 6 percent to more modest projections of 2.0-2.5 percent. Although the current spate of activity in some sectors, such as real estate, construction and agriculture, is encouraging, tight government fiscal policy, high interest rates, unsettled foreign exchange markets, and limited private sector activity are likely to constrain growth rates for the foreseeable future. No reliable data exist on Egypt's large informal sector, which may account for 30 to 50 percent of economic activity and serves as the employer of last resort for poor Egyptians. However, government hiring constraints and economic weakness have increased the number of job seekers in the informal sector.

Fiscal Policy: The government's strong commitment to fiscal stringency has been a major element in its successful stabilization program. From a high of about 17 percent of GDP in FY 1990/91 (year ends June), Egypt slashed its budget deficit to 4.7 percent of GDP in FY 1992/93 (excluding earthquake relief), 2.8 percent in FY 1993/94, and a projected 1.5 percent in FY 1994/95. Although the government did agree to a 15 percent wage increase for the public sector during the year, it should be able to achieve its GDP target in the coming year.

Total government revenues rose by approximately 9 percent in FY 1993/94, two thirds of which comes from taxes. The government instituted a general sales tax (GST), applicable at the import and manufacturing level, in May 1991. The GST is to develop in stages into a full value added tax; the second stage was supposed to have been implemented this past summer, but in fact was postponed. Taxes on certain consumer goods (alcoholic and soft drinks, tobacco and petroleum products) not integrated in the GST were raised and progressively converted to ad valorem taxes. Customs duties were also increased, preferential tariff rates virtually eliminated and import-related fees raised.

Balance of Payments: According to the Central Bank, the

Economic Outlook in 1995

contacts, intensify trade flows, strengthen science and technology and launch a dialogue on economic policies that will promote growth and development. This committee has been complemented by the organization of an independent President's Council of senior Egyptian and American business leaders which will seek to highlight areas of economic and commercial opportunities and identify possible obstacles to doing business. The Joint Committee will also oversee implementation of a U.S.-Egyptian Science and Technology Agreement.

Economic Outlook in 1995

The significant upswing in Egypt's economic growth at the outset of 1995 was predicated on an acceleration of the structural reform program and on continued improvements in the macroeconomic situation. The desultory nature of the economic reform program in 1994 has since led some observers to argue that the program has stalled. Therefore, government actions, particularly with regard to privatization and trade liberalization, will be closely monitored by investors both at home and abroad. Inflationary pressures, extremist elections, could contribute to a further delay in implementation of promised reforms.

Economic growth in 1995 and beyond still depends greatly on Egypt's ability to create an economic climate conducive to private sector activity. The government will remain firm in its commitment to maintain the current LE/USD exchange rate, though modest corrections to improve Egypt's export competitiveness cannot be ruled out. Absent pressure on the pound, interest rates should head downward, causing a temporary -- but manageable -- outflow of capital. Recent indications that economic activity is beginning to pick up are encouraging. However, inflationary pressures could jeopardize any recovery and need to be monitored closely. Balance of payments prospects are fair: tourism, hard hit by the events of the last three years, should begin to pick up while remittances will remain steady at approximately \$5 billion annually. A modest downturn in both petroleum revenues and Suez Canal receipts is to be expected.

The government will continue to hold the line on expenditures; job creation and expansion in economic activity will therefore be dependent on a robust private sector. Competition in the banking sector will remain intense. Less profitable banks will likely

II- Situation and Outlook for the Agricultural Sector

farmers previously were obliged to sell their cotton to the government, they were given the option of selling to private sectors buyers as well. In the case of sugar, growers still were required to sell their entire crop to the government. Otherwise, the costs of inputs and market prices were to be determined by market forces, although the government did established a floor, or intervention, price by which farmers could elect to sell some crops to the government if prices dropped too low.

The private sector is now much more active in the distribution of production inputs, marketing and agribusiness. Although most input subsidies have been eliminated, the fertilizer factories still are owned and managed by the public sector.

Although farm prices have increased in the wake of policy reform, to the real benefit of the rural economy, limited arable land and a large and expanding population have combined to make Egypt dependent on imports for about one half of its total food requirement. Wheat, corn, vegetable oils, meats, and dairy products are the principal commodities imported. Although Egypt benefited from its sixth consecutive year of expanded wheat production, imports and consumption have begun to dip somewhat, a function of higher international prices and lower domestic incomes. The U.S. is by far the largest supplier of food and feed grains to Egypt at this time.

Egyptian agricultural trade marked a noticeable increase in 1994 compared to 1993. The value of both imports and exports rose. Agriculture's share of total trade also was higher compared to the year before, approximately 51% of total imports, compared to 37% in 1993, and about 14% of all exports, compared to 12% in 1993. Imports of agricultural products from the U.S. also were up, preliminary indications suggesting a total close to \$850 million, mainly on the strength of increased imports of wheat and corn.

The volume of most export crops increased by about 2.5% in 1994, mainly on fair export demand for rice, citrus, potatoes, and onions.

There have been a number of significant policy changes in the area of agricultural exports. Private sector companies are now allowed to export rice. This apparent opening of

II- Situation and Outlook for the Agricultural Sector

decided to limit exports owing to a shortage in local cotton production.

Weather conditions in 1994/95 were favorable for some crops, but most winter crops, and especially horticultural crops requiring relatively low winter temperatures, experienced lower yields. Also, sandstorms greatly affected the flowering cycle of citrus, apples and grapes. A lack of rain on the north coast, the Sinai, and in the western desert also had a very negative impact on the wheat crop in those areas as well as sheep production, which is dependent in large part on rain-fed grasses. Given the water situation, the Ministry of Irrigation limited the quantity of water available for rice production because more acreage ended up being planted to that particular commodity than had been originally anticipated. This resulted in a rice yield lower than officially estimated. The cotton crop currently being harvested is expected to show considerable improvement over last year's total. Still, the use of delinted seeds for the first time this year caused many farmers to become uneasy. Slow seed germination owing to cool temperatures in March was enough to persuade many of them to change their cropping patterns, thus making any significant rebound in production in 1995 fairly unlikely.

The future of the Egyptian cotton sector is promising owing to a couple strongly encouraging factors: price liberalization and increasing competition in the purchasing, ginning and marketing of the commodity. The reprivatization of the industry began in earnest in 1994, and there is no reason to expect that the drive to increase production and higher profits will slow down. However, even with the recent reopening of the cotton exchange in Alexandria, trading by the private sector has not reached significant volumes. Indeed, Egyptian exports of cotton from the 1994 crop dropped substantially compared to 1993 because of the decline in local production. By contrast, GOE officials estimate that the quantity traded by private sector companies this year may reach as high as 40% of the total crop. On the other hand, the private traders have limited options for disposing of cottonseed. They can sell the seed to the government-owned oilseed crushers; they can have the seed crushed by one of the government companies for their own account on a fee basis or processed with the by-products marketed on a mutually determined revenue sharing basis; or they can export. The willingness of at least one government crusher to rent capacity to the private sector may be in fact a signal of things to come.

II- Situation and Outlook for the Agricultural

outlook for exports of U.S. beef and other high quality meat products for the tourist trade is somewhat more promising, but not without serious obstacles. The rescission in January 1995 of an official waiver exempting high quality U.S. beef from the Egyptian 7% maximum fat content requirement effectively closed the market to all imports of frozen beef. Efforts to have the waiver reinstated are ongoing.

Consumer prices are determined by market forces for all commodities save three: vegetable oils, sugar, and bread. The first two are mainly distributed under a ration card system to about 90% of the population at subsidized prices. Everyone holding a ration card is entitled to 500 grams of vegetable oil per month at a price of LE 1/kg, and one kilo of sugar at LE 0.50/kg. Local pita (baladi) bread sells at LE 0.05/loaf, as compared to a production cost of about LE 0.12/loaf. Most food items available through the government outlets tend to be cheaper, in greater supply and often of a higher quality than comparable goods sold in privately-owned stores at free market prices. Several important factors worked to increase the market price for foodstuffs in Egypt both in 1994 and 1995. These included a relatively high inflation rate (10-11%), the impact of Uruguay Round concessions on import prices, at least in the short run, and a Ministry of Economy decision not to allow any food product to enter Egypt unless it has at least 50% of its original shelf-life remaining, a requirement many foreign suppliers are finding difficult to meet.

Egypt has made significant progress in liberalizing its agricultural trade regime, but the domestic industry remains highly protected by non-tariff import requirements and high tariff rates. A major government objective is to encourage agricultural production for export in order to improve the national trade balance and balance of payments. The President issued a number of economic decrees over the past year which included establishing a higher council for the promotion of exports, which he will head. Other decrees: 1) give the private sector the green light, "for the first time," to participate in the building of power plants and roads, 2) allow for the removal of officials in unprofitable public sector companies, and 3) pave the way for liquidating the government's share in joint ventures in those cases where the share does not exceed 20% of the invested capital.

III- SITUATION AND OUTLOOK BY COMMODITY GROUPING

Potatoes are grown all over Egypt, but the four major producing areas are found in the governorates of Beheira, Menoufia, Giza and Gharbia. Together they account for 75 percent of total production. The next four largest potato growing governorates are: Dakahlia, Minya, Kalubia, and Alexandria. Other governorates comprise only about 8% of the total potato production area. The governorates of Beheira, Menoufia, and Gharbeya grow white potatoes and red and Draga varieties are cultivated on a wide scale. These are followed in importance by the Baraka, Claudia, Disire, Gratta and others. White potatoes are used mainly for local consumption. Cara and King Edward varieties are exported to the United Kingdom (UK).

There are two major and three minor potato crops a year and each is grown for definite and specific purposes. About 5-10 percent of the summer crops is grown for export; 80 percent is for domestic consumption. The average traditional potato farm ranges from 0.75 - 1 feddan. Most traditional potato farmers (over 50 percent) produce potatoes on very small acreage, generally between 0.5 to 0.75 feddans.

The General Potato Growers' Cooperative (P.G.C.) represents the potato growers in Egypt and is affiliated with many local and national cooperative organizations.

Potato seed is produced domestically, but is also imported. Traditionally a large percentage of seed potato imports are from the European Union (EU), principally Holland, Scotland and Northern Ireland. Approximately 30 percent of the total seed potato requirement is imported each year to keep the cycle operating. Egypt cannot import from the U.S. because of Brown Rot. Potato seed is imported during December for the summer crop. Potato seed for the crop harvested in winter is taken from the previous summer production, which is placed in cold storage from harvest time (May/June) until September-October, when the winter crop is planted. Farmers normally will hold their summer harvest for use during the fall planting. However, no seed is held over from the winter crop for planting the summer crop.

According to the most current information available, the following institutions have been largely responsible for

III- SITUATION AND OUTLOOK BY COMMODITY GROUPING

for export potato production is estimated as follows:

100-120 kg Nitrogen/feddan
75 kg of (B2O5) Phosphates/feddan
48-72 kg (K2O) Phosphates/feddan
20-30 MT Organic manure/feddan

Earlier this year, some traders reportedly sprayed their potato crops rather heavily with questionable pesticides including DDT to deter infestations of potato moth. The matter caused quite a local stir. As a counter measure, the Egyptian Government moved to confiscate 2,000 tons of potatoes which had been marked for export, declaring in the process that the Egyptian market was free of harmful potatoes.

Potato production expanded from 994,563 MT in 1993 to 1,324,649 MT in 1994. Both the summer and winter (Nili) potato crops tend to be quite large. The summer crop accounts for about 40 percent of all potato production. Planting starts as early as August and continues until mid-February. Harvest stretches from early November through June. There is a period from late June to early October accounts for approximately 40 percent of total supply. The domestic market is the primary target for the winter crop. An intermediate crop (Mehayara) is grown for special export to the UK; and there is a small potato crop which is generally harvested in October in an area south of Alexandria. It serves a very narrow market, however.

Much of the traditional Nile Delta and Valley potato growing areas are infected with Brown Rot (Bacterial Wilt). This disease causes the plant to die prematurely, thereby decreasing yields. Since many of the small farmers do not use certified seed, the probability of their using seed infected with Brown Rot is very high. The Government and potato exporters are making a strong and essentially successful effort to reduce the incidence of Brown Rot in potato exports.

On the domestic side, at Cairo's market situated at El Obour on the road to Ismailia, approximately 15 out of a total of 75 wholesalers control more than 55 percent of all potatoes marketed. In the El Nozha (Alexandria) market, about 4 of 10 wholesalers control more than 60 percent of the potato market. Many other private wholesalers scattered around the

III- SITUATION AND OUTLOOK BY COMMODITY GROUPING

Sales of Frozen French Fries

Year	Export Tons	Domestic Tons
1990	1,501	271
1991	5,907	1,460
1992	10,206	2,378
1993	7,420	3,500

The domestic consumption of potatoes in Egypt is as follows:

(Thousands MT)

1987/88	1988/89	1989/90	1990/91	1991/92
1472.3	1298.5	1292.7	1204.7	1469.1

The production of potato is seasonal and supply fluctuates during the year. Traditionally, potatoes are available in the domestic market all year round, but between October and April domestic availability is greatest. Retail prices reach LE 1.20-1.500/kg. (US\$ 1.00 = LE 3.4), while wholesale prices run about LE 0.80-1.00/kg in El Obour market, LE 0.60-0.85/kg in Alexandria market. Prices tend to increase as quantities decrease - between April and October. During these five months, retail prices increase to about LE 1.80/kg., with wholesale prices running about LE 1.20/kg.

The major challenge is to provide adequate supplies of lower-priced, high quality seed so that farmers can increase the general supply at a reasonable price for both the domestic and export markets.

Tomatoes: Tomatoes are the most widely grown vegetable crop in Egypt. Tomatoes are a very difficult commodity to market both domestically and abroad. Production is spread out over the entire country and throughout most of the year. The total area planted in 1994 was 353,477 feddans. The total yield of commercial production of tomatoes was 14.18 MT/feddan. Normally, the average yield/feddan of tomatoes for the entire year is 11.57 MT with summer yields averaging 13.42 MT/feddan and winter yields averaging 10.28 MT/feddan.

Tomato production in 1994 is estimated at 5,010,689 million MT.

III- SITUATION AND OUTLOOK BY COMMODITY GROUPING

The Vacolta variety is shipped to European and Saudi Arabian markets. The Castle Rock and Bara 84 varieties are shipped only to Saudi Arabia.

The varieties of tomatoes planted must meet two critical criteria: 1) They must be resistant to white fly infestation; and 2) They must withstand the poor handling conditions that occur throughout the marketing cycle.

The postharvest handling system is in serious need of improvement. Roads, ports, and other infrastructure need to be up-graded. Problems with poor handling have resulted in high losses and high prices.

The local market is sensitive to the size, shape, level of acidity and general appearance of tomatoes. Some areas of the country are better suited than others to tomato production because of soil characteristics, water availability, proximity to market, etc. Tomato production in Egypt is utilized in order of importance as follows: 1) domestic fresh consumption; 2) export for fresh consumption (mostly to Gulf markets); and 3) processing.

The predominant use of tomatoes in Egypt is for domestic consumption. Tomatoes are picked so as to reach the market at the optimum color stage. Tomatoes are marketed through four systems. Each system requires a different amount of participation on the part of the grower:

- KELALA. The buyer contracts for a crop prior to harvest. A price is determined based on the variety, the expected yield, demand and price at the time of harvest. Kelala is the least popular method of marketing tomatoes.
- WHOLESALING. The grower harvests, packs and transports his tomatoes to a wholesaler. The wholesaler then acts as a commission broker.
- MIDDLEMEN. Local traders purchase at the farm gate. They carry the tomatoes to any market where prices are thought to be best.
- FARMGATE. Essentially a mix of the latter two. Under this system, the grower will often buy and move tomatoes to the major markets.

III- SITUATION AND OUTLOOK BY COMMODITY GROUPING

available in Egypt. This is because:

- Tomato quality is not up to industrial standards because of White Fly infestation.
- There also is a lack of adequate infrastructure for harvesting tomatoes. For example, bulk transportation from the field to market is by open truck (no refrigerated trucks are used for local delivery) and hand loaded. Poor roads contribute to the rapid deterioration of the packaging.
- Manufacturing technology is under developed.

In cooperation with Heinz USA and tomato research centers around the world, Heinz/Egypt has launched a pilot project for planting a special variety of tomato. The crop was processed in Egypt and was found to produce a world-standard tomato concentrate.

Prices have fluctuated greatly since 1987 with new lands coming into production. Price fluctuation is directly related to the size of the crop and the effects of White Fly. This year, the wholesale price of Peto tomatoes has ranged from LE 9/20 kg. at its seasonal low to a high of LE 25-27/20 kg. when low supply drove prices higher. Peto is found only in the wholesale market. Cherry tomatoes have sold wholesale for LE 4 for grade 2 and LE 12/kg for grade 1. The common tomato had a wholesale value of LE 0.50-0.65/kg. and retailed for LE 1.50/kg.

Disease and pest controls are generally adequate, except in the case of White Fly. It is especially troublesome in the warmer months. During the colder months, when the incidence of White Fly would normally be lower, the walk-in tunnels produce favorable breeding conditions. In addition, there are other various fungi which are known to cause rot in tomatoes. Some of these can be controlled by fungicides before or after harvest. A special problem in Egypt is that many tomatoes are harvested after they are too ripe. Over-ripe tomatoes are more susceptible to attack by *Rhizopus* spp. and sour rot.

Grapes: Grapes represent the third largest fruit crop by area after citrus and dates, second in production after citrus, and third in value after citrus and bananas. Since grapes are among the most suitable fruit crops for sandy

III- SITUATION AND OUTLOOK BY COMMODITY GROUPING

Egypt, most of the traditional cultivars have adapted to local climate conditions. In general, there are insufficient chill hours to bring about an even bud break. For the seedless cultivars, like the Thompson Seedless, a growth regulator may be applied to compensate for the lack of chill hours.

Lack of knowledge of appropriate technology, proper irrigation, and pest control problems are among the most significant factors affecting preharvest losses.

Post-harvest losses may occur during any of the following steps: field handling during harvest, transit to packing house, packing house handling, gassing and fumigation procedures, fast cooling and cold storage, transport to market and retail market.

Low quantities of table grapes from domestic production appear in the local market around early to mid-May. Prices are highest at the end of May. Volume rises consistently from mid-June to the beginning of August when it reaches a maximum level. The availability of grapes decreases steadily from September through December.

The most important issues related to the domestic marketing of table grapes concern the non-technological marketing functions which facilitate the buying and selling of the product. The dominant marketing channel begins first with the growers, then on to either field selection or the packing house, through to the local market, which may be either a central or pooling market, and finally to the consumer. A second channel sees grapes moving from the packing house through the wholesalers and retailers, sometimes to the supermarkets, and then on to the final consumer.

Although the quantities of table grapes delivered to the wholesale markets are very low compared to the total quantity produced, these markets play an important role in determining the prices of table grapes at the time of marketing. During May and June, when quantity is at its lowest, the price reaches its maximum of about 200 percent of its yearly average. As the quantity increases, the price decreases and reaches its minimum in July and August. The seedless varieties have higher prices compared to the seeded varieties. It appears that growers have been planting larger amounts of seedless grapes because prices have been consistently higher for those varieties.

III- SITUATION AND OUTLOOK BY COMMODITY GROUPING

United Kingdom, 187 tons; and Germany, 127 tons.

Grape exports in 1994 started in May, reaching a peak in July, then decreased dramatically in October and November, reaching a minimum by the end of November.

Although grapes may offer the greatest potential among fruit crops for export, several obstacles will challenge future exports of Egyptian table grapes to the European market. These include a poor marketing and harvesting system. Also, uneven packing, grading, and shipping continue to affect quality. Post-harvest handling remains a major problem. Lack of refrigerated storage and sturdy packaging are major problems. The lack of good banking services, customs and food inspection regulations, availability of transport facilities and government cooperation in assisting exporters also present major challenges.

This said, there is a good potential in Egypt for expanding the table grape market because of climate, labor, location, and seasonal market opportunities.

Fish: According to the Statistics Department of the Ministry of Agriculture, Egyptian imports of fish in 1994 totaled an estimated 97,816 MT. Horse, Mackerel, Mackerel, and Sardines are the species most imported. In 1994, the local production of fish was estimated at 368,466 MT. Per capita consumption is estimated at 7 kg/year. The only public company specializing in the production and marketing of fish is the Egyptian Fish for Marketing Company. As with other government-owned companies, this one too is slated to be privatized. It has 500 branches located from Aswan to Alexandria to El Arish, and is represented in all of the governorates.

The company has 300 refrigerated vehicles for transferring fish from the port to the wholesaler and on to the retailer. The company imports 50,000 MT of frozen fish yearly, mainly from Europe and Canada. It also exports 700-800 MT of sole annually to Italy, France, and Greece.

This year, shrimp sold wholesale in the domestic market for about LE 24-26/kg; it retailed for LE 45/kg. Horse mackerel sold wholesale for LE 2.63. The domestic price of Mackerel has been running around LE 2.25; Sardines, LE 1.79; Grey Mullet, L.E. 9-10; Tilapia, L.E. 5.36; and Sea Bream, L.E. 0.90.

IV- SITUATION AND OUTLOOK FOR PRODUCTION RESOURCES

Water is delivered to irrigated lands mainly through an extensive network of canals. Water is supplied to the canals by several pumping stations and eight diversion barrages situated on the Nile River below the High Dam. These eight barrages provide water for about 80 percent of the irrigated area. The remaining 20 percent of the water is pumped directly from the Nile. There are approximately 670 irrigation pumping stations, of which some 400 are considered to be main pumping stations.

Between the High Dam and the Mediterranean Sea, barrages divide the Nile River channel into seven reaches. Most irrigation water diverted from the river is pumped through the main canals. From the main canals, the water flows into lower canals until it reaches the mesqas, the distribution ditches that service the individual farmer. The on-farm ditches are called marwas. All canals upstream of the mesqas are part of the main system. The mesqas and marwas are owned, operated, and maintained by the farmers.

The Ministry of Public Works and Water Resources administers the Nile system and its irrigation and drainage structure.

The Ministry schedules water release from the High Dam and must approve all diversions from the system. The Ministry is directly responsible for the operation and maintenance of all public irrigation canals and drains. Mesqa maintenance is the responsibility of farmers.

Fertilizer Consumption

The widespread use of fertilizers is relatively new in Egypt since for millennia farmers depended on the annual Nile flood to renew the land with valuable silt deposits. Following the completion of the Aswan Dam in 1968, demand for fertilizers grew rapidly. Since then, the growth and development of the Egyptian domestic fertilizer industry have been impressive.

Prior to the government's policy reforms first introduced in 1986, the Principal Bank For Development & Agricultural Credit (PBDAC) was assigned a monopoly role for the procurement and distribution of fertilizer. Prices were both controlled and subsidized. In the mid-1980s, the government introduced a program involving the progressive deregulation of the domestic economy. This program included the free market pricing of most

IV- SITUATION AND OUTLOOK FOR PRODUCTION RESOURCES

chemical used. Insecticides for use on cotton account for 70% of total pesticide use. The Ministry of Agriculture classifies pesticide use into two major categories: traditional and nontraditional crop use. Prior to the reforms, private sector companies were allowed to import and sell pesticides for nontraditional crops at unsubsidized prices. These mainly included pesticides for fruits and vegetables and certain other crops including beans. Chemicals used for nontraditional crops were sold through some 10 or 12 distributors, each one having a dealer network and technical support from the international chemical companies.

For the traditional (strategic) crops (cotton, rice, sugar cane, corn), the MOA would issue tenders for designated pesticides, which the PBDAC and MOA would procure from domestic formulators or imports. The PBDAC would finance these purchases and store the chemicals for the MOA on a commission fee basis.

With the implementation of policy reforms, the traditional crops were freed from government control and the subsidies prevalent during the late 1980s were terminated. The private sector pesticide distributors and dealers took over the government's role in supplying pesticides, while the farmers began to apply their own pesticides, with the exception of cotton. However, now that the production and marketing of cotton also has been deregulated somewhat, there is concern within the MOA and among some of the pesticide companies about who is to be responsible for inspecting the cotton crop and applying the necessary chemicals.

C. CHANGES IN POLICY

On the whole, there have been few dramatic changes in policy affecting the supply and utilization of food and agricultural products over the past year. The trend toward desubsidization continues. As mentioned above, only the consumption of baladi and shami breads, vegetable oil and sugar is still subject to GOE intervention. Most oil and sugar is sold according to the dictates of the free market, and the elimination of the ration card, of which these items are still a component, is expected by the end of 1996.

IV- SITUATION AND OUTLOOK FOR PRODUCTION RESOURCES

is also likely to foster the resurgence of Egyptian cotton in the international marketplace in the years to come.

At present, price floors exist for cotton, wheat and rice. Except for water, virtually all production inputs are sold at market prices as production subsidies have been essentially eliminated. Although a significant quantity of cotton will continue to be sold by farmers to cooperatives run by the Ministry of Agriculture, an increasing percentage will be processed and sold privately. The only other major crop for which government processing and marketing will continue is sugar cane. Eventually, even this vestige of GOE agricultural production and processing interventionism will be decontrolled.

Along with the parring down of the list of banned import products, there are now only two banned products: poultry and textiles. By the end of 1994, the GOE had reduced tariff rates on most goods by 10%. Without question, the liberalized import environment has allowed for the sale of a greater variety of food products ranging from breakfast cereals to bananas. Quantitative controls on imports, bilateral agreements and special trade concessions are not significant factors affecting Egyptian agricultural trade.

Egypt has been a relatively minor recipient of food aid since 1991. European Union donations of Italian sunflowerseed oil and French wheat continue to be made, albeit at reduced levels. Similarly, World Food Program supplies of flour, oil and cheese are provided for certain food-for-work projects, but overall levels of these donations-in-kind are small compared to commercial imports. Egypt has not had a U.S. PL-480 Title I Program since FY 1992.

In terms of bolstering agricultural production, Egypt continues to profit from overseas technical assistance. USAID had been funding the National Agricultural Research Project (NARP) in Egypt over the past five years at a total cost of about \$200 million. That program was officially terminated this summer and a successor program is in the process of being developed, but at a lower overall program cost. In addition, over LE 300 million have been allocated for agriculture development projects under the USDA Section 416 (b) Program during the past several years.

IV- SITUATION AND OUTLOOK FOR PRODUCTION RESOURCES

pulp, which is used by the refineries as fuel.

The majority of Egyptian farmers work no more than two acres of land on a regular basis. These small landholdings are a reflection of the high cost of land that can reach the \$7,000/acre in the reclaimed desert. As much of one-half of Egypt's arable land is cultivated by peasants who rent from wealthier landowners. Financial constraints minimal in comparison to the cost of land. Water is free, but farmers must buy everything else.

The prevailing exchange rate, which dates from 1991, has not had an impact on Egypt's agricultural trade. Agricultural exports have been limited by the lack of market development, insufficient supply available for export in some cases, and quality problems in others. The lack of attention to exports has been recognized and a few private sector exporters are discovering niche markets for fresh asparagus and papayas, for example, which are air shipped to Europe in winter. In the summer of 1994, the GOE publicly admitted that it needed to do something to help spur exports and announced that it would streamline export inspection procedures to simplify that aspect of export procedure. A strong push was made by the IMF to get the GOE to accede to a currency devaluation in order to make Egyptian products more internationally salable, but local policy makers balked claiming that a devaluated currency would disrupt investor confidence. In the meantime, the IMF also since backed away from its devaluation demands.

The GOE does not subsidize or tax exports.

All Egyptian production of fertilizers is still under public sector ownership, but marketing has been desubsidized. That is, all fertilizers are sold to farmers at market prices. The six Ministry of Industry entities that produce fertilizers, all of which are part of the Holding Company

For Chemical Industries are likely to be sold to private investors or be privatized, in part, by means of stock offerings. Like fertilizers, pesticides and herbicides are priced according to market conditions. While Egypt is a exporter of fertilizers, it is a net importer of pesticides and herbicides.

KEY ECONOMIC INDICATORS *

	1991/92	1993/94	1993/94
CONSUMER PRICE INDEX (PCT)	9.7	15.0	N/A
WHOLESALE PRICE INDEX (PCT)	14.0	10.2	N/A
EXCHANGE RATE (USD/LE)			
FREE MARKET RATE	0.332	0.333	0.338

* Latest figures for which uniform data are available.

	1991/92	1993/94	1993/94
BALANCE OF PAYMENTS AND TRADE			
TOTAL EXPORTS FOB/3	1094	1026	N/A
EXPORTS FROM U.S./4 (CY, USD)	3037	2762	1579
TOTAL IMPORTS CIF/3	3028	3222	N/A
IMPORTS TO U.S./4 (CY/USD)	434	613	324
TRADE BALANCE	-1933	-2196	N/A
TRADE BALANCE WITH U.S. (CY)	-2603	-2149	-1255
AID FROM U.S. (USFY, OBLIGATIONS)	2342	2097	1892
EXTERNAL PUBLIC DEBT/5	5300	3430	3400
DEBT SERVICE PAYMENTS (PAID)	N/A	N/A	N/A
GOLD AND FOREIGN EXCHANGE/6 RESERVES	9900	1480	1600

The Egyptian Fiscal Year is July 1 to June 30. Unless otherwise indicated, all figures above are for this period.

- (1) Real GDP are factor cost figures based on the 1991/92 prices.
- (2) Lending and deposit rates are average estimates.

AGRICULTURAL INPUT USE:

AGRICULTURAL INPUT USE:

(A) Consumption of Major Fertilizers (MT)

Year	Nitrogen	Phosphorus Pentoxide	Potassium Oxide	Blended Phosphate
1991/92	738,950	124,930	21,042	884,922
1992/93	909,817	201,389	33,328	1,144,534
1993/94	750,000	180,000	40,000	1,200,000

(B) Chemical Consumption (MT)

Year	1992	1993	1994
	5,056	3,361	3,000

LAND USE

	1994/95 (Estimated) Hectares	1995/96 (Planned) Hectares
Winter Crops		
Wheat	924,000	1,050,000
Beans	147,000	170,000
Berseem clover	735,000	651,000
Flax	12,700	12,600
Garlic	9,000	8,500
Lentils	10,500	10,500
Barley	117,600	117,600
Sugar beet	25,200	33,600
Winter vegetables	252,000	199,500
Chickpeas	8,400	8,400
Orchards	390,180	446,880

TOTAL IMPORTS CY 1994

COMMODITY	TOTAL		U.S.		%VALUE
	VALUE(1)	QUANTITY(2)	VALUE(1)	QUANTITY(2)	
Corn	262	2021	167	1601	64%
Wheat/flour	736	6650	550	5207	75%
Beans	37	120	----	----	
Lentils	36	64	----	----	
Tea	89	57	----	----	
Cows (3)	----	185	----	----	
Sheep/goat(3)	----	30	----	----	
Red meats	----	153	18	24	
Beef livers	25	18	----	----	
Poultry meat	45	21	3	4	6%
Fish	56	135	----	----	
Butter	54	40	4	3	7%
Butter oil	20	12	----	----	
Dry milk	36	21	3	1	8%
Cheese	38	21	----	----	
Sunflower oil	35	73	5066	7	
Soybean oil	----	----	----	----	
Palm oil	68	149	----	----	
Tallow	----	34	15	34	
Sugar	166	550	----	----	
Tobacco	143	47	----	----	
Cotton	----	----	----	13	
Soymeal	106	474	28	142	26%
Forest Products	380	1	----	----	
Total Agr	4969	----			
Total Imports	9575				
%Agr	51%				

- (1) Value is in millions dollars.
- (2) Quantity is in thousand tons.
- (3) Quantity is in thousand number.

Source: Central Agency for Public Mobilization and Statistics (CAPMAS) and U.S. Trade Runs.

FARM GATE AND RETAIL PRICES - 1994

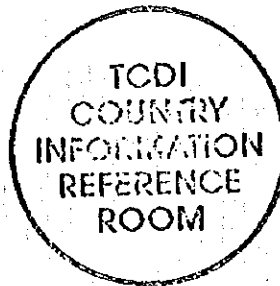
FARM GATE AND RETAIL PRICES - 1994

COMMODITY	FARM GATE PRICE LE/TON	RETAIL PRICE PIASTERS/KG
Beans	992	182
Lentils	1542	270
Wheat	533	59
Corn	564	108
Rice	1092	146
Potatoes	798	120
Tomatoes	443	100
Onions	392	75
Garlic	492	98
Oranges	500	--
Sugar Beet	63	--
Sugar Cane	81	--
Sugar	--	160
Sesame	2500	360
Peanuts	1373	208
Cottonseeds	666	--
Soybeans	850	--
Sunflower seeds	900	--
Vegetable Oils	--	350

付属資料10. エジプト農業概要 (FAO)

FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS

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FAO REPRESENTATION

EGYPT

FEB. 13 1997

ANNUAL REPORT
JANUARY - DECEMBER 1996

JANUARY 1997

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C.1 Executive Brief

C.1.1 Political Situation:

The reporting period witnessed large scale political moves on both the regional and the international levels. President Mohamed Hosny Mubarak visited Turkey, Libya, Tunisia and Zimbabwe. During the same period, Egypt received the Prime Minister of Turkey, the French President and the Polish Prime Minister. The above exchange of visits aimed to open wider gates for the peace drive in the Middle East Region and to strengthen the economic relations between Egypt and other friendly countries.

C.1.2 Economic Situation:

Egyptian-European partnership negotiations continued. A conference was held in London to inform businessmen on investments opportunities in Egypt. The Government is making a lot of effort to attract foreign investors in different economic fields. The total investments of the Government, Public and Private Sectors, have reached L.E. 38 billion or 16.8% of the GDP, which grew by 3.5%. However, exports increased to US\$ 4.5 billion and imports reached US\$ 11 billion. The domestic debt hit L.E. 225 billion. The total state budget for 1996 reached L.E. 77.5 billion. The objective of the Government is to increase the growth rate of GNP to 5% annually. The number of ventures approved during 1996 exceeded 1200 projects. Egypt succeeded to reduce its foreign debts by 2.7%. Egypt and IMF reached an agreement to write off the third tranche of Egypt's debt valued to US\$ 4.2 billion.

The third Middle East North Africa Economic Conference was successfully held in November 1996 in Cairo, Egypt.

C.1.3 General Agriculture Information

The agricultural sector contributes 20% to the GNP and 30% of exports. Most of food and field crops productions have increased, especially wheat, rice, sugarcane and cotton. The gross agricultural products reached L.E. 23.7 billion. The self-sufficiency in wheat is now more than 55%. Major innovations in the agricultural sector include Al Wadi Al Gadid Canal, which will transfer water to the southern areas of Egypt in the New Valley from Lake Nasser behind Aswan Dam, and Al Salam Canal which would cross Suez Canal to North Sinai.

The agricultural strategy for 1997 will include the sitting of minimum prices of crops in line with world prices to encourage farmers increase their production. It also includes expansion of oil crops.

C.1.4 FAO Current Programme

In 1996, there was a number of 14 projects executed by FAO, two financed by UNDP, one by TSS-1, one by UNFPA, one by USAID and nine by TCP. The total budget of the programme was US\$ 7,866,429. The main structure of FAO programme is based on TCP and TF projects, as UNDP funded projects are decreasing. The existing pipeline list of projects is related mainly to TCP proposals. However, there are four Trust Fund proposals, but the UNDP pipeline is still vague: the Country Strategy Note for Egypt is not yet completed and there is no foreseen joint programming work in the near future.

Special reference is made to the contents of the chapter on "Assessment of FAO Programme" in the present report.

C.2.1 GENERAL COUNTRY INFORMATION

Political Situation:

C.2.1.1 The reporting period witnessed large scale political and economic moves on both the regional and international levels to open wider gates for the peace drive in the Middle East region. Based on this premise, President Hosni Mubarak visited France in July, mainly for pushing forward the Middle East peace process and fostering stability in the region in line with the effective European role to this concern.

C.2.1.2 According to observers, President Mubarak's visit to Turkey in July also was an important step towards boosting the Turkish-Arab relations in general and the Turkish-Egyptian relations in particular. The visit was a good opportunity for the two countries to draw-up a new plan for enhancing their cooperation in the various spheres including the economic one.

C.2.1.3 President Mubarak visited Libya and Tunisia in October, mainly for talks on political developments; also the discussions gave room to bilateral economic cooperation.

C.2.1.4 The October visit by Turkish Prime Minister Necmettin Erbakan to Egypt at the head of a high-ranking delegation has acquired a special significance as it expressed the two countries' keenness to realize wider economic cooperation and boost the volume of bilateral trade exchange. The economic side of the talks of the Turkish Prime Minister figured high as it focused on expanding Egyptian-Turkish joint enterprises and fostering bilateral relations in different fields of activities including investment, industry, trade, etc... Worthmentioning, the final communiqué issued at the end of the negotiations between both the Egyptian and Turkish sides stressed their keenness on achievement of comprehensive and equitable peace in the Middle East.

C.2.1.5 On the 3rd of November, The President called in Harare's G-15 Summit for a constructive dialogue between the participating countries in this group and the developed countries, reactivating work of the committees on investment and trade, and underlining the South's interests at the WTO meetings held in Singapore in December. Addressing the inaugural session of the G-15 Summit, President Hosni Mubarak called for launching a constructive dialogue among the states of the G-15 and the group of the seven industrialized states, in order to provide justice and fairness in international relations. He also stressed the need for finding appropriate solutions for the problems facing developing countries because of globalization of the world economy, and the increasingly marginalized role of these countries.

C.2.1.6 French President Jacques Chirac's brief visit to Cairo in November at the end of his six-nation Middle East tour, naturally focused on

political issues and on Europe's role in the peace process, yet there was also room for topics dealing with bilateral relations. President Mubarak described the French Leader as advocate of upgrading Egyptian-French ties. It is worth mentioning that France is the first country to agree on Egypt's selling its debts worth \$ one billion through the French Export Guarantee Institution. Egyptian-French economic relations witnessed great progress during the past period in various fields especially trade, investment, finance and tourism. Volume of bilateral trade exchange last year scored 7158 million francs. Egyptian exports reached 1232 million francs, while imports hit 5926 million francs.

C.2.1.7 The Polish Prime Minister Wlodzimiere Cimaszemicz visited Egypt in December. Talks covered a number of regional and international issues, especially development in the Middle East peace process and means of boosting trade and economic relation between the two countries. The Polish Prime Minister also met with his Egyptian counterpart, Dr. Kamal El Ganzouri, where they exchanged viewpoints on the achievements secured in the two countries with particular focus on privatization process, attraction of foreign investments and liberalization of foreign trade and means of stepping up bilateral trade exchange and mutual investments. Egypt and Poland have signed a number of agreements on economic and technical cooperation.

Economic Situation:

C.2.1.8 The seventh round of the Egyptian-European Partnership negotiations was held in Brussels from July 16 to 18, to discuss the acceleration of holding the partnership agreement and solving the problems impeding the increase of Egyptian agricultural exports to Europe to 1.5 billion dollars.

C.2.1.9 The London International Conference, organized by the American Chamber of Commerce in Egypt, which took place during July 1996 in Britain, has mainly probed challenges and opportunities of investment in Egypt. The conference proved highly significant in informing investors, businessmen and the international financing and investment institutions on the latest economic developments in Egypt, and investment opportunities and facilities being provided to the foreign investors, following the latest economic decisions adopted by the Egyptian Cabinet.

C.2.1.10 Also, during July 1996, the Government reviewed the economic situation, indicating that the policy of the Government is founded on basic axes represented in expanding the scope of development through reactivating investment movement, removing constraints, forging ahead with free economy, enhancing up performance and production.

C.2.1.11 The Egyptian economy began to harvest from the Government policies encouraging investment in Egypt. These policies comprised

amendments of the companies laws and the taxation facilities for commercial and industrial professions, vocations conducive to attracting more investments particularly in the fields of petroleum, industrial and real estates investments. Reflections have been clear on the growth of the securities market in Egypt. Volume of the securities' stock exchange works skyrocketed from on billion dollars in 1993 to more than 8 billion dollars this year. The gross national product amounted to approximately L.E. 199 billion (approximately \$59 billion), by 3.5 % growth rate. Exports increased to \$4.5 billion and imports to \$11 billion in the year 1994/95.

C.2.1.12 In line with the Government's efforts to boost investment and remove obstacles impeding its activities, it has been recently declared that special working groups to be chaired by ministers and some businessmen will head to foreign countries to promote and propagate for 100 big investment projects with aggregate costs worth L.E. 75 billion. Leading international companies will invest in these ventures so that transfer of foreign technology to Egypt could be effected.

C.2.1.13 The domestic debt volume hit L.E. 225 billion. The total domestic debt is expected to reach L.E. 250 billion by the end of this year. This was due to the set up of the infrastructure which necessitated the Government's depending on borrowing. However, the Government is keen to cut down the domestic indebtedness through promoting the private sector. The domestic debt service in the state's budget within the fiscal year 1996/97 includes L.E. 13.4 billion interests and L.E. 2.9 billion - installments. The total service of the domestic indebtedness hit the L.E. 16.3 billion.

C.2.1.14 The items of the state's L.E. 77.5 billion budget in 1996 fiscal year included:

- wages and pensions:	L.E. 23 billion
- domestic and foreign debt's burdens:	L.E. 23 billion
- Foreign expenditure, subsidy and remittance:	L.E. 23 billion
- Service Authorities investments:	L.E. 8.5 billion

The Gross Domestic Product (GDP) is estimated to be L.E. 250 billion at the end of 1996.

C.2.1.15 Figures of the social and economic development plan 1995-96 show that aggregate GDP amounts to L.E. 225 billion and that a ratio of 89% of this sum is assigned for consumption, whereas 11.6% of the aggregate GDP is used as domestic savings.

C.2.1.16 The total investments of the Government, public and private sectors have amounted to L.E. 38 billion or 16.8% of the GDP. Moreover, filling investment gap depend on savings of the Egyptians working abroad and foreign remittances which amounted to L.E. 14 billion in addition to domestic savings amounting to L.E. 24 billion.

C.2.1.17 Achieving annual growth rate of 5% along with providing investment achieving 500,000 job opportunities, requires increasing total

investments to L.E. 50 billion. In the meantime, achieving a growth rate of 3.5% along with providing half a million job opportunities requires providing investments of L.E. 40 billion.

C.2.1.18 According to the first scenario which presupposes aggregate annual investments of L.E. 50 billion annually, foreign investments which are needed amount to 3.5 billion dollar in the current exchange rate. In the light of the second scenario which presupposes aggregate investments of L.E. 2 billion, equivalent of 600 million dollars, which is nearly the current number for flow of foreign investments which ranges between \$ 450 million to \$ 500 million.

C.2.1.19 The number of ventures approved by the Investments Authority during the first eight months of 1996 reached up to 1134 projects, as compared to 599 ventures during the corresponding period of 1995, marking a growth rate of 89%. Aggregate capital of these projects hit L.E. 9.1 billion, compared to L.E. 3.8 billion in 1995, whereas investment costs edged up to L.E. 19.2 billion against L.E. 7.4 billion in 1995, ensuring about 125,409 working opportunities.

C.2.1.20 Egypt has succeeded in reducing its foreign debts by 2.7% during the first half of this year. France tops the list of countries to which Egypt owes the biggest share of debts followed by US and Japan. A recent report by the Central Bank of Egypt indicated that Egypt's foreign debt has been reduced by 2.7% at the end of June this year to reach \$30.9 billion marking a reduction of \$845 million.

C.2.1.21 After a long period of delay, Egypt and the IMF have finally reached agreement whereby the Paris Club members are to write off the third tranche of Egypt's debts to member states valued at \$4.2 billion. Reports indicated that Egypt will lodge a request for exempting it from interests of these written off debts. The agreement came after positive discussions on the new Egyptian reform programme for the coming two years and support of the reforms carried out since 1991. The agreement is a unanimous international testimony of Egypt's successful economic reforms and creates good atmosphere for foreign investment in Egypt.

C.2.1.22 The Third Middle East North Africa Economic Conference (MENA) held in November, has achieved success that exceeded previous expectations. The conference was convened amidst an atmosphere of fears and doubts that it would not achieve progress, however these fears were dispersed with the proceeding of the conference sessions that culminated in agreeing on \$ 10 billion worth of projects. The following are some valiant features of the conference:

- 87 states attended the conference.
- 52 international, Arab and regional institutions attended, including 2600 businessmen out of a total of 4600 participants.
- Europe topped the list of participant countries by 39 countries.

- Egypt submitted about 188 projects to the conference in various fields, having total investment cost estimated at \$34 billion.
- The private sector offered 109 projects with total investment cost estimated at \$13 billion.
- Volume of contracts signed between Egypt and investors during the conference scored \$10 billion.

C.2.2 GENERAL AGRICULTURE INFORMATION

C.2.2.1 The agricultural sector gains mastery over 33% of the Egyptian manpower, sharing in the commodity exports by 30% and contributes to the gross national product by 20%. The Government, considers the agriculture sector as one of the potentially growing and energetic sectors. In addition to the previously effected achievements, the reclaimed lands have increased to 7.7 million feddans during the past ten years, thus having the full figure of cropped area to reach 14.2 million feddans (intensity 190%). The agriculture sector has been one of the earliest economic sectors encouraging the private sector to enter into liberalized economic activity. It has also undertook the first privatization operations the Egyptian economy witnessed.

This sector enjoys, on the grounds of good climate, location, and infrastructure, a distinguished place amidst the investment-attracting activities, underlining that some areas comprise the High Dam Lake, Lake Qaroun, the Borollous Lagoon and some other areas such as Al-Farafra, Al-Dakhla, and Al-Kharga cases.

Investment opportunities increased in the fields of land reclamation as some enterprises enrolled within the third state five-year plan have started implementation.

C.2.2.2 Deputy Prime Minister and Minister of Agriculture and Land Reclamation affirmed that electing Egypt last year as chair of the International Wheat Council has taken place in appreciation of its efforts aimed at increasing production of major crops, especially cereals whose production rose from 8 million tons in 1982 to 17 million tons in 1995, whereas wheat production rose from 1.87 million tons in 1982 to 5.7 million metric tons in 1995.

C.2.2.3 Meanwhile, Sugar Crops Research Institute has introduced new varieties of sugarbeet that could be cultivated in winter in Upper Egypt. These breeds are known for their high yields and could help achieve self-sufficiency of sugar. Research on increasing sugarbeet productivity will narrow the gap between production and consumption, decrease imports of such a vital crop, besides establishing new sugarbeet plants.

C.2.2.4 The Gross Agricultural Product during 1995 reached about L.E. 23.7 billion, compared to L.E. 4.8 billion in 1982, while in 1995 agricultural exports reached L.E. 1.2 billion compared to L.E. 455 million in 1982. The total cropped area had been increased to 14,200,000 feddans under a target aimed at producing 18 million tons of agricultural crops in 2000. The Agriculture Sector's Growth rate reached 3.4% and agriculture had achieved self-sufficiency in wheat production of more than 55%, forecasted to reach 75% by blending corn flour with wheat flour.

C.2.2.5 The President recently reviewed the "Al Wadi" Canal project which would transfer water to the New Valley (Al-Wadi Al-Gideed). The implementation of this canal is expected to render the southern areas of Egypt into greenery. The Minister of the Public Works and Water Resources, displayed the situation of the River Nile abundant flood this year 1996 and the measures that would be adopted to avert hazards of this high flood and influx of tremendous waters.

C.2.2.6 This canal would realize an ancient Egyptian dream on boosting the space of the abundant agricultural lands to 500.000 feddans, as well as providing job opportunities to almost two million laborers. The Canal components comprise an elevation station, open water ways and courses, pipes or tunnels if deemed necessary, as well as techniques of interconnecting the Nile waters and the underground waters through reservoirs networks or appropriate irrigation means. The source of water for this New Canal Valley is the Lake Nasser, behind Aswan dam.

C.2.2.7 As getting out of the old valley towards further urban expansions comes within the main priorities on the part of the Government, the President opened in November the first stage of Al-Salam Canal, 175 kms east ward of the Suez Canal. Al Salam Canal is designed to have the River Nile water reach Sinai through a culvert beneath the Suez Canal for the cultivation of 400,000 feddans in Sinai (east of the Suez Canal) with cost estimated at L.E. 5.7 billion. The Canal will also ensure the cultivation of other 220,000 feddans in 5 Governorates located westward of the Suez Canal, including Damietta, Dakahlia, El Sharkiah, Port Said and Ismailia.

C.2.2.8 The Cotton Exporters Union announced cotton export prices. New resolutions set up by the Government allow the trade sector to export cotton quantities to the tune of one million kantars and in the meantime, allow weaving companies to import their needs of short staple cotton, provided that it meets the set specifications.

C.2.2.9 The International Conference of Irrigation and Drainage, held in September 1996, confirmed that Egypt is seeking to optimize the exploitation of its water quota and that scarcity of water prevailing in numerous areas in the region had destructive economic and social consequences. The Government affirmed that Egypt is sustaining a limited supply of water, which spotlighted the importance of seeking to increase Nile Water resources and to benefit from its potentials in favor of all countries of the Nile Basin according to long term and studied planning.

C.2.2.10 Latest facts and figures on agriculture:

- Egypt ranks first worldwide in her rice productivity per feddan (3.4 tons per feddan).
- Egypt's wheat productivity had risen from 7 ardebs per feddan to 17 ardebs per feddan achieving self sufficiency of 55% and expected to reach 75% within the course of two years under the successful

- National Wheat Campaign, adopted by the Government, the cultivation of 2 million feddans of wheat.
- Egypt's production of sugar-cane reached one million tons annually, as per feddan productivity reached 45 tons annually, ranking first in the world in sugar cane production per unit area, whereas sugar-beet production is 110,265 tons, aimed to reach 650,000 tons over the upcoming four years. Egypt may realize self-sufficiency in sugar production in the year 2000.
- Volume of Egypt's agriculture exports reached L.E. 1.4 billion of fiscal year (1995/96), compared to L.E. 470 million in 1982. This figure is expected to reach L.E. 5 billion in the year 2000 within Egypt's plan to set-up agriculture exports to Europe and USA, in line with Egypt-EU and US partnership agreements.
- Domestic fish production rose from 200,000 tons in 1982 to 345,000 tons in 1995.
- The cropped area rose from 11.2 million feddans in 1982 to 14.2 million in 1995 owing to increasing agricultural extension.
- Grain production rose from 8 million tons in 1982 to 18 million tons in 1996.
- Volume of credit available to agricultural output has increased from L.E. 1.2 billion in 1982 to L.E. 9 billion in 1995.

C.2.2.11 The Agricultural Development Strategy effective as from the Fourth 1997 Development Plan within the framework of local, regional and international variables will concentrate on continuing to increase production of grains totaling 18 million tons annually through the cultivating of high-yield varieties. The plan further aims at continuing to launch national campaigns and to set an arbitrary minimum for prices of crops in such a manner that these prices run in line with prevailing world prices. The rice planted area is aimed not be increased beyond 900,000 feddans.

The Ministry of Agriculture strategy aims at widening the scale of oil crop production and the production of sunflower, Soya bean and canola, increasing production of sugar from wider scale planted sugar beet.

The following table shows the development in quantitative production of major crops during the period from 1981/92 to 1995/96:

**Developments on Production of Major Crops During
the Period from 1981/82 - 1995/96**

Crop	Production Per Thousand Tons				Growth Rate %	
	81/82	86/87	91/92	95/96	95/96 81/82	Annual
Wheat	2071	2811	4618	5813	181	7.6
Barley	150	178	213	220	47	2.8
Maize	3375	3019	5122	5115	52	3
Summer Corn	670	639	676	769	15	1
Rice	2326	2668	3448	4888	110	5.4
Beans	273	337	215	416	52	3.1
Lentils	6	19	11	20	233	9
Other Edibles	36	37	25	44	22	1.4
Cotton Blossom	1326	1087	791	681	48.6	4.6
Flax	109	106	81	87	20	1.6
Sugar Cane	9065	10262	11095	11648	28	1.8
Sugar Beets	198	835	744	1876	847	17.4
Peanuts	30	26	27	67	123	5.9
Sesame	17	12	30	34	100	5.1
Sun Flower	12	16	41	30	150	6.8
Soya Beans	131	137	120	65	50	4.9
Cotton Seed	645	580	494	425	34.1	2.9
Lin-seed	19	15	16	20	5	4
Vegetables	931	12578	11940	15225	69	3.8
Onions	743	763	1093	1184	61	3.5
Fruits & Dates	2369	3441	5078	6170	160.4	7.1

C.2.2.12 Egypt's third strategy for agricultural development, until the year 2017, will focus on increasing agricultural production through exploitation of available resources, especially land and water, protecting the environment and encouraging exports. The strategy's main target is achieving food self-sufficiency. The strategy includes creating large numbers of jobs, especially for young people, promoting women's role in the development process and supporting agricultural guidance and market activities. It also includes comprehensive programmes for fighting pests and diseases, encouraging Egyptian and foreign investments in agriculture, expanding cultivated lands and supporting projects for manufacturing food and exports.

The following are highlights on some important crops/sub-sectors, new development and issues in agriculture and related sectors during the reporting period:

C.2.2.13 Cotton: The area cultivated with cotton in 1996 reached 921,000 feddans with a surge of 211,000 feddans against last year. The average production per feddan was 7.8 kantar, the highest production that cotton has ever realized. All governorates underwent a surge in cotton production this year. Spearheaded with Qalobiya, Assiut, and Sohag. In the marketing season of 1996/97, the Government - in order to encourage the growers - proclaimed a pricing limit guarantee as early as possible. In such a pricing limit guarantee, the Government took into consideration several criteria foremost the alternative chance cost of the competitive agricultural cycles of the cotton crop, the expected world prices and output costs.

In the meantime, it has been decided to appropriate L.E. 300 million to balance the cotton prices and purchase it from the farmers through prices of guarantee ranging between L.E. 440 and L.E. 700 per qantar. This fund would promptly intervene if the purchase prices dropped down than these prices and this would be effected through the marketing circles that have been established in the governorates numbering some 658 circles until now.

Demand on importation of the Egyptian cotton by many countries and the increased contracting in the recent period have encouraged the private sector to initiate transactions in the domains of cotton purchase according to the minimum prices.

C.2.2.14 Rice: The Ministry of Agriculture has started cultivating some 22 new varieties of rice that need for growing only half the amount of irrigation water needed by traditional rice varieties. Senior agriculture ministry officials said that some of the new varieties can be cultivated in desert lands and land reclamation areas by drip sprinkler irrigation, as it resists drought and its needs of water do not exceed 400 cubic meters per feddan, whereas the conventional rice varieties need up to 8000 cubic meters of water per feddan. The cultivation of the new rice will save huge quantity of water. This amount of water could be channeled into the land reclamation projects or increase the rice area. This will have its positive effect in increasing rice production and provide it on the market at a lower price. Moreover, the Government would have a surplus for exporting. Noteworthy, Egypt had been able to rank first worldwide for over two years in rice productivity per feddan (3.4 tons per feddan). The Government decided to export 600,000 tons of Egyptian rice this year. Appropriate procedures were taken for marketing rice to the interest of producers and consumers and to increase Egyptian rice on foreign markets.

Mills are provided with one-million tons of rice to increase exports in international markets through cooperatives, which will deliver it to the marketing centers.

C.2.2.15 Sugar Crops: Egypt's sugar production has increased from 650,000 to about one million tons. Meanwhile, the per-feddan production of sugar cane reached 45 tons annually, making Egypt one of the leading sugar cane producing countries. However, the Ministry of Agriculture plans to expand sugar beet cultivation in Upper Egypt governorates within the framework of a programme to replace sugarcane in this part of the country.

The ad-hoc plan aimed at increasing the areas cultivated with sugar beet by 50% by the year 2000 to replace sugarcane plantations. This replacement will produce half a million tons of sugar. The expansion of sugar beet cultivation in recently reclaimed areas was a success. The success of this year's sugar beet crop in Minya governorate would lead other upper Egyptian governorates to follow suit to meet the requirements of sugar factories.

C.2.2.16 Horticultural Crops: Egypt realizes an abundance of vegetables and fruits meeting the requirements, achieving self-sufficiency and a big surplus for exportation is also available. The Ministry of Agriculture and Land Reclamation policy is to continue increasing horticultural productivity, improving post-harvest operations such as sorting, wrapping, packaging, transport and storage, encouraging set up of vegetables and fruits stock exchange, to facilitate meeting between producers, marketers and exporters.

The Ministry is planning to export 500,000 tons of potatoes next season, compared to 430,000 tons last season. Measures are underway for protecting Egyptian potato crops destined for export to Europe. These measures include importing only enough potato seeds to meet production requirements, noting the Ministry will import 5,000 tons of certified seeds. The Ministry will carry out regular inspections of potato crops and there will also be committees supervising the export, harvesting and packaging processes.

C.2.3 EXTERNAL ASSISTANCE TO AGRICULTURE

C.2.3.1 USAID: The Minister of Agriculture announced that implementation has commenced of the agreement on a new agricultural policy scheme financed by the United States Agency for International Development with a \$290 million grant to be extended over a period of four years. The scheme's programme aims at increasing agriculture sector productivity, development of agro-industrialization, marketing and export, eliminating challenges facing wider scale private sector investments and creation of a free competitive marketing system.

C.2.3.2 JAPAN: Japan has approved \$10 million grant to Egypt with a view to rehabilitating nine irrigation stations to serve isolated agriculture lands in Quena and Aswan. The grant agreement was concluded recently between the Japanese International Cooperation Agency (JICA) and the Ministry of Public Works and Water Resources, as implementing this operation will last two years. Renewing and restoring 15 irrigation stations are now being studied with international donors to attain \$15 million required for financing.

C.2.3.3 FRANCE: Four cotton ginning factories for producing seeds of first grade cotton and three stations to threshing grains will be set up in cooperation with France. France will give Egypt an easy-term loan of 72 million French Francs to set up those projects. A joint project will be executed to improve seeds, especially of potatoes.

C.2.3.4 IDA: The People Assembly's Agriculture and Irrigation Committee approved a \$26.7 million loan agreement provided by the International Development Agency to be utilized in developing irrigation in Egypt. This would be effected through improving the irrigation services and increasing the efficiency of water use and transfer of the responsibilities to farmers, in addition to improving communications between the farmers and policy-makers.

C.2.3.5 SOUTH KOREA: The South Korean Agency for International Development decided to allocate \$1.5 million in the form of a non-refundable grant in contribution to conducting marketing, management studies and to laying out the Technology Valley Scheme's general blueprints under erection in 17,000 feddans east of the Suez Canal.

C.2.4 FAO CURRENT PROGRAMME

During the reporting period, FAO programme in Egypt consisted of some 14 projects under implementation, with a total budget of US 7,866,429 out of which two UNDP funded projects (\$1,800,332), one TSS-1 project (North Sinai Programme: \$ 42,000 for FAO/ILO/UNESCO), one UNFPA funded project (\$ 506,097), one Trust Fund project (Phase II of the USAID project on Nile Monitoring, \$3,800,000), and nine TCP projects executed during the year 1996 (1,718,200). The details of the projects, currently under operation (summary table in Annex 1), are presented herebelow:

C.2.4.1 UNDP Funded Projects

C.2.4.1.1 On-going Projects

A. EGY/88/024: Expert Systems for Improvement of Crop Management, EOD: June 89, NTE: December 96, Budget: US\$ 1,566,800 - L.E. 1,528,971
Upon Government keen interest, and after preliminary consultations with UNDP and FAO/HQ, a proposal was prepared with the NPD and forwarded to UNDP, to consider the project for its conversion into a regional project/center of excellence, for the introduction of expert systems technology in the Near East Region, but no reaction was received from UNDP. For this purpose, the Ministry of Agriculture has established a unit called Central Laboratory for Agricultural Expert Systems in the same project site, which will continue under the supervision of Agricultural Research Center. The much overdue TPR meeting of this project was held on 18 November 1996. The meeting recognized the fact that this project is an initiative which persuaded the Government to invest in this high technology field. However, the meeting felt that the Government effort for sustainability still needs to be supported for few years until the system is integrated into the structure of the Agricultural Research Center. The meeting therefore recommended one year more of limited funding from UNDP on the understanding that the Government and FAO would try during this year to mobilize funds from other resources to cover a follow-up phase. The Government has officially written to UNDP to allocate 50 to 60 thousand Dollars for the one year extension but it seems that UNDP is reluctant to continue supporting this project for a further year.

B. EGY/95/002: Protected Cultivation Phase II, EOD: June 87, NTE: December 96, Budget: Cost Sharing Total US\$ 149,022

The project concentrated its activities during the reporting period on intensive training courses.

All parties concerned are satisfied with the results achieved and requested that the extension of the project be considered within the WASAD National Action Plan and Programme for Egypt. A proposal within the WASAD programme is directly related to the objectives and outputs of the present Protected Cultivation Project.

The Government continued urging UNDP and FAO to consider converting the project into a regional center for protected cultivation as a new technology introduction in the Near East Region, but the position of UNDP is not clear. Due to Government pressure, UNDP agreed to extend the project by one year with very limited funds from UNDP's side and the bulk of the cost will be covered by the Government Cash Contribution.

C. EGY/95/01T: TSS-1 North Sinai Pilot Scheme: Operationalization of Sustainable Human Development/Agro Enterprise Programme (SIAP)

The outcome of this original UN multi-agency coordinated work, was the preparation of a long-term development programme "Sinai Agrosettlement programme" (16 years duration), which will be initiated by a pilot project under the title of Sustainable Human Resources Development: Sinai Integrated Agrosettlements Programme (SIAP), aiming to improve the quality of life for the people on sustainable basis through exploitation of hitherto unutilized natural resources and their management, without compromising healthy environmental consideration. The SIAP focuses on promoting settlement by broadening the economic base in the target area, by providing additional means of livelihood, which would lead to an overall improvement in living conditions.

The SIAP will engage human resources in development related activities, development planning through mobilization and integration into the planning process (people's participation). The target groups are young graduates and low-income groups. The draft document of the pilot project within the cost of US\$ 983,000 half of which to be provided by UNDP and the balance by the Government was submitted to UNDP in June 1996. The document of the pilot phase was signed by the Government and UNDP in November 1996 as a Government executed project. FAO was promised to implement a number of months/consultants under TSS-2 to support the project in fields of FAO competence, but no action was taken from UNDP so far, as the project is still not fully operational.

C.2.4.2 UNDP Pipeline Projects

The Ministry of Agriculture has officially submitted six project proposals to UNDP for possible financing. All these proposals have been prepared with the assistance of FAO, either through TCP programme, other regular programme activities or WASAD. These projects are:

- 1- Policy, Technologies and Environmental Protection for Use of Treated Wastewater in Agriculture
- 2- Role of Women in Rural Development
- 3- Promotion of Agricultural Investment and Export of Agricultural Products for Small & Medium Holdings for Poverty Alleviation
- 4- Agricultural Development in Sharkia and Fayoum Governorates
- 5- Use of Genetic Engineering Technology to develop Resistant Plants against Insects and Diseases
- 6- Use of Expert Systems to Improve Communication Efficiency in the Agricultural Sector

FAO is trying with the Ministry of Agriculture and UNDP to facilitate approval of at least some of these projects and involve FAO in their implementation.

C.2.4.3 UNFPA Funded Project

C.2.4.2.1 FPA/EGY/316/FPA: Integrating Population and Family Life Education in Agricultural Extension. EOD: 1994, NTE: February 1998, Budget: UNFPA Contribution US\$ 499,167, GCC L.E. 2,138,800

The project activities during the reporting period included the production of audio-visual material for training purposes, training of trainers, holding training courses for extension workers; each course lasted for 2 weeks. The steering committee of the project was held in June and was attended by concerned officials from the Government side, in addition to representatives from UNFPA and FAO. A budget revision was approved in June by UNFPA and has increased the project budget by about \$35,000.

The project management is preparing for another revision to phase out unspent allocation in 1996 to 1997.

C.2.4.4 Trust Fund Projects

C.2.4.4.1 Ongoing Projects:

A. GCP/EGY/018/USA: Monitoring, Forecasting and Simulation of the Nile River Basin, Phase II, EOD: September 93, NTE: September 96, Budget: Donor Contribution US\$ 3,800,000

The NTE of the project was 21 September 1996 but it was extended twice, first to 21 December 1996 and second to end of February 1997, to allow time for finalizing the document of phase III. This follow-up phase will have broader focus on water management, transfer of technology and sustainability.

USAID has approved the new project for a duration of 4 years. The Government is also convinced that FAO should continue to provide technical assistance to this project, and contacted USAID to agree for the continuation of FAO as executing agency. The project management paid a short visit to Rome to discuss this subject, as well as problems of the past and how to avoid them in the future. After intensive discussions between all parties concerned which involved a visit from the Country project Officer. The document of the third phase was prepared, cleared, approved by the Government and USAID and was submitted to the Government for signature. Meanwhile, we are following up closely to ensure the signature of the document as early as possible and to also sign the Grant Agreement with USAID.

C.2.4.4.2 Trust Fund Pipeline Projects

The following project proposals are still in the active pipeline during the reporting period and are receiving the necessary follow-up by FAO/Hqs and FAOR Office, in order to be considered for funding by the potential donors. The summary of these pipeline projects is the following:

- **Control of the Honey Bee Varroa, Mite and Associated Disease**
Budget: Donor Contribution ECU 748,060
Government Contribution: (in cash) L.E. 1,656,240 and (in kind) L.E. 448,800 Potential Donor: European Union.
- **Employment in Sericulture Development:**
Budget: UNDP Cost Sharing US 1,103,180 Potential Donor: European Union.
- **Operationalization of the Unit of Policy and Coordination for Women in Agriculture**
Budget: Donor Contribution US\$ 1,013,366 , Government Contribution:(in cash) L.E. 954,300 and (in kind) L.E. 822,450; Potential Donor: The Netherlands. During the reporting period, we learned that the Dutch Government will finance this project as nationally Government executed project.
- **Integrated Management of Water Hyacinth in Egypt**
Budget: Donor Contribution US\$ 2,503,677, Potential Donor: Egyptian Social Fund
This was rediscussed again with Ministry's authorities to expedite its review, and updating with Ministry of Public Works and Water Resources, for further submission to consider for financing by interested donors (Multilateral or Bilateral) and possibly by the Social Fund for Development.

C.2.4.5 TCP Projects

C.2.4.5.1 TCP Projects Completed during the Reporting Period

TCP/EGY/4555 - "Emergency Assistance for Farmers in Flood Affected Area"
The emergency project operations were completed during the reporting period. The FAO Representative, a.i., the Programme Officer and the National project Director paid a short field visit to several project sites, where beneficiaries and Government officials expressed their appreciation for FAO assistance. The draft Terminal Statement of the project was prepared and sent to HQ for clearance and official submission to the Government.

C.2.4.5.2 Ongoing TCP Project:

TCP/EGY/4554 - "Assistance to Develop Production Capacity Inactivated Poultry Viral Vaccines", (US\$ 225,000)

All equipment, recommended by the project consultants, have been procured. The international consultants and the Backstopping Officer visited the project during 1996. Most of the project activities have been implemented. However, the issue of privatization, which is a major aspect of the project, is still being debated. A national consultant has prepared a draft agreement for negotiation with the foreign partner. This draft is now under Government clearance. Meanwhile, a private sector veterinary service company is showing interest in the issue, and is considering the possibility of entering into joint venture with the foreign partner in case the Government declines (which is more likely).

TCP/EGY/4556 - "Improving the Efficiency of Horticulture Marketing", (US\$ 252,000)

The international consultant (Team Leader) Mr. J. Evans, paid his second visit to the project along with the other team members in April 1996. The national consultants prepared their reports, which were conciled by the Team Leader in one draft comprehensive report. The report was discussed during a high level meeting, before the departure of the international team. The report has been cleared by HQ and was submitted to the Government. The national workshop will be held from 22-23 January 1997. The Team Leader consultant and the Post Harvest consultant will arrive Cairo on 17 January to prepare for the workshop.

TCP/EGY/4557 - "Establishment of National Dairy Herd Improvement Programme in Egypt (DHIS/E), (US\$ 193,000)

The project workplan was prepared, with the assistance of the concerned technical officer during his visit to the project in May 1996, while the project team was already in the field. As a result of this visit, a project budget revision was issued to accomodate the cost of national consultants. Action was taken to recruit those consultants and to activate the project operations. During the second half of the year, the project concentrated its activities on expanding milk recording system, holding of training courses, technical meetings and purchase of needed equipment according to the project budget. A study tour was also arranged for one specialist to Germany in September 1996, to learn about the German experience on incorporating modern techniques of milk analysis into milk recording system.

TCP/EGY/4558 - "Emergency Assistance for the Date Palm Weevil Control", (US\$ 126,000)

The project workplan was finalized by the project's team leader and the NPC, during the visit of the Team Leader in march 1996. The NPC and one specialist were sent on a study tour to Saudi Arabia to see on the spot ongoing experiments of Palm Weevil Control. The study tour was conducted

in August 1996. Activities of the project continued smoothly, particularly with regard to infestation recording, development of improved traps and training. The second consultancy mission of the project was fielded in October 1996.

TCP/EGY/4559 - "Assistance to Policy Formulation and Demonstration of Sustainable Reuse of Wastewater in Agriculture (US\$ 228,000)

The first backstopping mission of the project was carried out in January 1996. The two consultancies on wastewater reuse policy and wastewater irrigation were filled during April 1996. During the same month, three national consultants were recruited on reuse management, irrigation agronomy and demonstration and training. The national consultant on water policy was also recruited after various correspondence with FAO/HQ and the Government authorities. The second backstopping mission was fielded during September 1996, during which most of the difficulties facing the project's implementation were resolved. During this mission, the project inputs were reviewed to accommodate additional funds for equipment, and a project budget revision was issued accordingly.

TCP/EGY/4560 - "Strengthening the Information Capacity of the Executive Authority for Land Improvement Projects (US\$ 246,000)

The objective of this project is to assist in improving agricultural productivity, particularly in saline soils. The first backstopping mission has been delayed for unavoidable reasons and was carried out during July 96. The mission assisted in preparing the project's workplan and initiated project implementation activities. Activities of the project continued on collecting data related to soil classification, geomorphology, flooding, land use, vegetation, drainage, water table, moisture conditions ...etc. During October 1996, the study tour, earmarked under the project, was arranged to Italy and Spain.

TCP/EGY/6612 - "Agribusiness Development in the New Lands (US\$ 167,200)

The document of this project was finally signed in August 1996 after several revisions. The objective of the project is investment promotion in the post-harvest sector in the new lands to increase farmers income. The first mission of the Team Leader was fielded during November/December 1996. Implementation of this project is likely to delay due to misunderstanding/conflicts on views between the Team Leader and the national counterpart, in regard to the selection of national consultants. This project is backstopped by the Regional Credit and Marketing Officer, RNE. However, a backstopping mission by FAO HQ's Officer will be fielded during January 1997.

TCP/EGY/6611(A) - Improvement of Artichoke Development (Phase II) (US\$ 60,000)

The document of this project was signed in August 1996. The main objective of the project is an improved national capabilities building in artichoke crop management, completing the activities undertaken under phase I of the project. No activity of this project has been implemented so far. However, the workplan was submitted in January 1997 and the mission for the agronomist consultant has been approved for February 1997.

C.2.4.4.3 TCP Pipeline Projects

Formulation of a Technical Assistance Project in the Field of Food Safety Control (6-1-EGY-117)

TCDT Division advised that due to the scarce information available in the proposal and as it is considered by ESND as a high country priority for the Government, so TCDT has proposed that a technical officer from ESND prepares a counterproposal for reconsideration by TCDT.

Production and Development of Food Composition Database System

A request was submitted by the Minister of State for Scientific Research, for FAO assistance in the establishment of food composition database from TCP resources. The proposal has been forwarded to the concerned technical officers in RNE Office, for evaluation and comments.

FAO Headquarters advised that this project and the previous one could be incorporated into one project. A Nutrition Officer from FAO Headquarters is expected to visit Cairo for two weeks to discuss these two proposals and come up with one proposal to satisfy the objectives of the two.

Nutrition Education in Rural Villages through Agricultural Extension Workers (6-1-EGY-118)

Background documents on the above proposal have been sent to TCDT from ESN Division for appraisal with support from the other divisions. TCDT is in the process of revising the document for its final appraisal.

Formulation and Assistance to the Fisheries Training Center, Alexandria , Arab Academy for Science & Technology (AAST) (5-V-EGY-105)

This proposal has been cancelled as it does not meet with the TCP criteria.

Improving the Efficiency of Plant Quarantine Services in Egypt, (5-EGY-109)

This TCP request could be reconsidered, and requires review and appraisal, with the eventual assistance of RNE Plant Protection Officer.

Assistance in Marine Aquaculture Development and Marine Hatching Technology in Egypt

TCDT advised that this proposal does not meet TCP criteria and should be deleted from the pipeline, the Government requested FAO to reconsider the

proposal and sent a new draft of the proposal prepared by the General Authority for Fisheries Development. The project document has been forwarded to the Regional Fisheries Officer in RNE, for revision and appraisal in order to forward it to TCDT for reconsideration.

Development of Ostrich Farming, (6-XII-EGY-121)

The project proposal has been rejected as it is considered not to be within the Government priorities.

C.2.4.5 Other Programme Activities

Other FAO activities in the country, which form an integral part of the workload of the FAO Representative Office, are: (a) offering services to support the organizational/administrative and financial services to the FAO Fellowships/Training Programmes and Study Tours for fellows/trainees and participants coming to Egypt, from projects in various Near and Far East countries; (b) the administrative assistance for the recruitment of consultants/experts, short-term conference staff i.e. interpreters, revisers/translators and typists from Egypt, on behalf of FAO technical and administrative services.

In the second half of 1996, support activities for FAO training programmes in Egypt and recruitment of Egyptian staff included:-

2 fellows (long-term post-graduate studies from Yemen) and 32 trainees and participants from China, Oman, Sudan and Yemen, and the recruitment of 12 Egyptian consultants/experts and 18 short-term conference staff.

Arrangements are being made with Ministry of Agriculture and Land Reclamation for the organization of training courses to be undertaken in 1997 for one trainee from Saudi Arabia, and 35 from Yemen (almost all of them arranged). The details for 1996, compared to the previous two years, which are available in the other relevant FAOR reports, are summarized as follows:-

Field of Activity	Total No. in 1994	Total No. in 1995	Total No. in 1996
Fellowships/Study Tour Participants	39	33	55
Egyptian Consultants	20	37	17
Interpreters	6	13	16
Translators	10	17	11
Dicto-Typists	10	21	Nil

Further details are presented in Annex III.

C.2.4.6 World Food Summit Preparations:

Within the framework of the in-country activities in Egypt for the WFS, the committee formed of staff from FAO Representation and members of the Internal Committee from the International Organizations and Conferences Department, Ministry of Agriculture carried out the following:-

1. National Seminar/Workshop at Experts' Level- Cairo, 22 July 1996

The purpose was to present/discuss the contents of the national paper for WFS, attended by the various ministerial departments in the Ministries of Foreign Affairs, Agriculture and Land Reclamation, Trade and Supply and other concerned services dealing with food security, directors of agricultural research institutes and some specialists in the Agricultural Research and Economic Affairs sectors. Also present were NGOs, the private sector, directors of agricultural development projects, int'l organizations related to the subject and RNE/FAOR staff. Number of participants: around 250.

2. Essay Competition among Secondary School Students

The contest on WFS themes was organized jointly with MINAGRI and the Ministry of Education. The first three winners were acknowledged and recognized (in cash and kind) at the Award Ceremony held on the WFD observance, 16 October 1996. They, together with one chaperon, participated at the Int'l Youth Forum during the WFS, Rome, 13-17 November 1996.

3. Issuance of Brochure by Ministry of Agriculture

This brochure was prepared by the different sectors of Agriculture, highlighting the achievements of different departments of the Ministry of Agriculture in the field of food security.

4. Journalists'/Mass Media Contest on WFS Themes

The contest was made jointly with the Ministry of Agriculture and the Ministry of Information. Prizes to the first winner in all three sectors of media: Radio, Television and Press were awarded prizes in cash and kind on the WFS celebrations on 16 October 1996.

5. Issuance of Commemorative Postage Stamp on WFS

This was done jointly with the Ministry of Agriculture and the Egyptian Postal Authority. A 15 piastres commemorative postage stamp was issued in line with the WFS logo.

6. Free Air Ticket Campaign to cover travel of NGO participants and Winners to WFS Essay Competition

This was done through FAOR with the local airlines and travel agents. Egypt Air's courteous assistance and discount on air fares was used for all WFS travel.

7. Press and Mass Media Campaign

Press, radio and TV interviews were all the time carried out to create and raise public awareness and information on the WFS and to launch the preparatory activities on WFS

C.2.5 ASSESSMENT OF FAO PROGRAMME

C.2.5.1 During the year 1996, there was a number of 14 operational projects executed by FAO. Three are financed by UNDP, one by UNFPA, one by USAID and nine by TCP. As a matter of fact, the assistance provided by FAO and other UN agencies in monetary term is very small, compared to the size of assistance provided through bilateral arrangements.

C.2.5.2 The main structure of FAO programme in Egypt is based on TCP and TF projects, as the UNDP funded projects are decreasing. This alarming situation requires alert consideration on the part of all FAO concerned divisions and services to revert this declining situation and build up positive contacts with UNDP, in addition to, multilateral and bilateral donors and institutions. There is urgent need to formulate a strongly active, technically and financially attractive pipeline of programmes/projects, that will receive the support of the Government authorities for implementation by FAO. The existing pipeline list of projects is related mainly to TCP proposals. There are only 4 Trust Fund projects in the pipeline, which existed since three years, and the UNDP pipeline is actually vague. This later situation is caused to a large extent by the UNDP attitude in regard to the agricultural sector which could be summarized in four constraints a) the continuous changes in UNDP priorities, year after year, b) granting lower priority to agriculture c) the ambiguous meaning of programme approach (at least until recently), and d) the very late response or no response to the Ministry of Agriculture's requests.

C.2.5.3 We have, therefore, proposed to the Government to request UNDP to finance a programming mission to discuss with the concerned Government officials new project ideas and screen them into a limited number for possible formulation and submission to UNDP and other donors. The Government acted very positively and officially requested a meeting with UNDP to discuss this idea or other means of selecting new projects in the agricultural sector. However, UNDP did not respond and asked for the submission of available proposals. Six proposals were submitted in September 1996, but none of them has been so far selected by UNDP.

C.2.5.4 The TCP assistance, though small, has been selected to serve a wider range of fields in the agricultural sector, and to open the way for specific development projects in critical areas. The relatively small contributions provided by the Regular Programme, to carry out a study, or to support a research scheme have been very instrumental in producing tangible results at very limited costs. There is a need to strengthen TCP pipeline proposals identification and preparation in the coming few months.

The new mechanism of FAO for TCDC Partnership Programmes (again with limited cost) is actually filling a gap which needed to be filled since long time ago. This programme in particular, is likely to expand the involvement of

FAO in many sub-sectors of agriculture and rural development, and would further improve the image of FAO at different levels.

C.2.5.5 The present status of the FAO Representation ad interim, on short part-time basis by the Programme and Planning Officer in RNE, needs not to continue for much longer period. The building and reactivation of a strong FAO field programme, with the support of FAO technical and operational divisions, would require a full-time active FAO Representative and Programme Officer, in order to be in full command of the FAO programme/activities in the country. In April 1996, the National Programme Officer (Mr. Ibrahim Abul Zahab), joined the office and after only three months of assignment, he could grasp all the strings, facts and necessary actions, to promote the country programme, both at the upstream and downstream levels, and to revitalize the programme development process, getting the benefits of his long field experience as FAO International Programme Officer/FAO Representative Assistant and FAO Representative a.i., in various countries.

Meanwhile, all efforts are being exerted with the support and guidance of OCD, RNE, and various FAO technical and operational divisions, to keep up and expand FAO's activities in the country and sustain activities of the ongoing programmes. It is to be noted that there is need for a more positive and cooperative attitude from the side of some technical and operational divisions/services, to extend the necessary technical backstopping and support services, in order to enhance the country programme development and implementation.

ANNEX I

**Summary Of FAO Executed Projects In Egypt
January - December 1996**

**FAO Programme
UNDP Funded Projects:**

Symbol and Title	EOD	NTE	Budget	Remarks
1. EGY/88/024 Expert Systems for Improvement of Crop Management	June 89	December 96	US\$ 1,566,799 LE 1,528,971	
2. EGY/95/002 Protected Cultivation Phase II	June 87	December 97	Gov. Cost-share US\$ 233,533 UNDP US\$ 248,533	
3. EGY/95/01T: TSS-1 North Sinai Pilot Scheme: Operationalization of Sustainable Human Development /Agro Enterprise Programme (SIAP)	Jan. 96	June 96	US\$ 42,000	The draft document of pilot project shows a cost of US\$ 983,000 half of which to be provided by UNDP and the balance by the Government.

UNFPA Funded Project

4. FPA/ EGY/316/FPA Integrating Population and Family Life Education into Agricultural Extension	March 94	Feb: 1998	UNFPA US\$ 506,097 GCCC L.E. 2,138,800	
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Trust Fund Project:

Symbol and Title	EOD	NTE	Budget	Remarks
GCP/EGY/018/USA Monitoring, Forecasting and Simulation of the Nile River Basin, Phase II	Sept. 95	Feb. 97	Donor Contribution US\$3,800,000	

Ongoing TCP Projects:

CONT'D ANNEX I

Symbol and Title	EOD	NTE	Budget	Remarks
1- TCP/EGY/4554 Assistance to Develop Production Capacity Inactivated Poultry Viral Vaccines	June 1995	Nov. 1996	US\$ 225,000	
2- TCP/EGY/4555 Emergency Assistance for Farmers in Flood Affected Area	October 95	April 1996	US\$ 221,000	
3- TCP/EGY/4556 Improving the Efficiency of Horticulture Marketing	Sept. 95	Sept. 1996	US\$ 252,000	
4- TCP/EGY/4557 Establishment of National Dairy Herd Improvement System in Egypt (DHIS/E)	April 96	July 1997	US\$ 193,000	
5- TCP/EGY/4558 Emergency Assistance for the Date Palm Weevil Control	January 96	April 1997	US\$ 126,000	
6- TCP/EGY/4559 Assistance to Policy Formulation and Demonstration of Sustainable Reuse of Wastewater in Agriculture	Dec. 95	Dec. 1997	US\$ 228,000	
7- TCP/EGY/4560 Strengthening the Information Capacity of the Executive Authority for Land Improvement Projects	Feb. 96	June 1997	US\$ 246,000	
8-TCP/EGY/6611 Improvement of Artichoke Development (Phase II)	August 96	July 1997	US\$ 60,000	
9-TCP/EGY/6612 Agribusiness Development in the New Lands	Sept. 96	Nov. 1997	US\$ 167,200	

**LIST OF VISITORS & MISSIONS TO THE FAO REPRESENTATION IN EGYPT
JULY - DECEMBER 1996**

NAME OF VISITOR	DATE OF VISIT	PURPOSE OF VISIT
A. Mashali	5.7.1996	Backstopping Officer for project TCP/EGY/4560
M. Nosseir	31.8.1996	To assist in the preparation of the GCP/EGY/018/USA project document of Phase III, and to backstop all on-going projects in Egypt
A. Kandiah	4.9.1996	Backstopping mission for project TCP/EGY/4559
F. Croche	8.9.1996	Wastewater Reuse Policy Consultant for project TCP/EGY/4559
R. Abdur	8.10.1996	To discuss arrangements for strengthening Global Information Early Warning Systems (GIEWS) collaboration and to expand its media coverage
Ms. N. Reddy Mr. H. Usman	15.11.1996 18.11.1996	Preappraisal Mission for Egypt Sohag Rural Development Project
D. Lugg N. Storr S. Clarke P. Johnson	17.11.1996	Formulation mission for El Beheira Second Rural Development Project
A. Oehlschlagek	20.11.1996	Consultancy for project TCP/EGY/4558, "Emergency Assistance for Date Palm Weevil Control".
A. Papasolomontos	22.11.1996	Prepare Letter of Agreement for the Regional Working Group of Greenhouse Production
L. Evans	25.11.1996	Backstopping Officer for Project TCP/EGY/6612
A. Wojciechowski	2.12.1996	Backstopping Officer for project TCP/EGY/4554
H. Loze	6.12.1996	To attend WFP/FAO pre-appraisal mission in connection with WFP-assisted project Egypt 5789 "Settlement on Newly Developed Land in Upper Egypt"
A. Guastavi R. Huisinga R. Grosz	10.12.1996	To attend SEAGA pre-testing workshop

FAO REPRESENTATION IN EGYPTTRAINING AND RECRUITMENT ACTIVITIES
JULY - DECEMBER 1996TRAINING COURSES/STUDY TOURS FOR NON-EGYPTIANS

<u>COUNTRY/PROJECT</u>	<u>NO. OF TRAINEES</u>	<u>FIELD</u>	<u>DURATION</u>
<u>CHINA</u> CPR/91/114	8	Irrigation	1 week
<u>IRAN</u> IRA/89/012	1 + 1F	Environment Impact Assessment	1 month*
<u>PALESTINE</u> PAL/GEN	4	Agric. Education	1 week**
<u>OMAN</u> GCP/REM/011/GLF	1	Fishery Assistant Skipper	24m.***
<u>SUDAN</u> GCP/SUD/050/NET	1F	WID	10 days

* programme arranged but Egyptian Government clearance not obtained and hence cancelled.

** Programme arranged but UNDP Jerusalem unable notify us of starting dates due to travel obstructions and hence not effected till to-date.

*** TCOF requesting extension of 2 years leading to B.Sc. in Fishery Technology.

ANNEX III (CONT.)

<u>COUNTRY/PROJECT</u>	<u>NO. OF TRAINEES</u>	<u>FIELD</u>	<u>DURATION</u>
<u>YEMEN</u>			
<u>YEMEN</u>			
FPA/YEM/93/301	1	Pop. Demography at the State Inf. Inst. Min. of Inf.	2 m.
UTF/PDY/011	1	M.Sc. in Agric. Ext. Alex. Univ.	30 m.
UTF/PDY/012	1*	Fruit Tree Prod.	1 m.
	1	Agric. Machinery	
	2	Agr. Dev. Projects	4 wks**
UTF/PDY/022	3	Administrative/ Secretarial Training at EICA	3 wks
UTF/YEM/019	1	Machinery Maint.	3 m.
	1	Agr. Economics	3 m.
	2	Hort. & Nursery Management	1 m.

* TCOF advised that another will replace him and both would be studying Agric. Machinery Maintenance.

** Programme arranged by MINAGRI to start 20/12/96 but not undertaken till to-date.

ANNEX III (CONT.)

<u>COUNTRY/PROJECT</u>	<u>NO. OF TRAINEES</u>	<u>FIELD</u>	<u>DURATION</u>
<u>YEMEN (CONT.)</u> UTF/YEM/022	7	Agr. Ext/	1 m.
	1	Stat. Meteorology at Desert Res. Inst.	1 m.
	1	Monitoring and Evaluation	3 m.*
	1	Irrig. Extension	1 m.
	1	Irrig. Proj. Man.	1 m.
	1	Fac. of Science Cairo Univ. Geophysics Dept.	12 m.
	1	Irrig. Engineering	1 m.

* Programme arranged by MINAGRI to start I/10/96 but then TCOF advised of the cancellation of the programme.

ANNEX III (CONT.)RECRUITMENT OF CONSULTANTS
JULY - DECEMBER 1996JULY - DECEMBER 1996

<u>NAME</u>	<u>PROJECT</u>	<u>PLACE</u>	<u>DURATION</u>
ABDEL AZIZ, A.I.	PAL/96/012 Agric. Policy Analysis & Planning Cst.	Jerusalem	2 months
ABDEL DAYEM, M.S.	TCP/SYR/4553 Irrig./Drainage and Water Management	Damascus, Syria Rome, Italy	19 days 2 days (debriefing)
AFIFI, Hani	TCP/YEM/4558 Monitoring and Evaluation Cst.	Sana'a, Yemen	2 months
AFIFI, Hani	TCP/LEB/5611	Beirut, Lebanon Rome, Italy	6 weeks 3 days (debriefing)
AGAMIA, M.	UTF/YEM/024 Communication Specialist	Sana'a, Yemen Rome, Italy	28 days 1 day (debriefing)
ANDRAWES, G.	TCP/SUD/4553 Agric. Doc. Cst.	Khartoum, Sudan	1 month*
DINANA, N	TCP/SYR/4553 Agric. Ext. Agronomist	Damascus, Syria	3 weeks
EL-SHABRAWY, A.	TCDC Agric. Ext. Cst	Sana'a, Yemen	1 month**
EL-SHAZLY, M.F.	TCDC Agric. Ext. Cst.	Sana'a, Yemen	1month***
EL-ZAYAT, M.	UTFN/SAU/002 Senior Plant Pathologist	Riyadh, Saudi Arabia	ext. from 31.07.96- 31.07.97

* Originally scheduled to take place in June 1996, but due to difficulty in obtaining entry visa to Sudan, mission effected only in October 1996.

** Offer rejected by Cst.

*** No reply received from Hqs. as to offer and consultancy not effected.

ANNEX III (CONT.)

FARAH, N. (Mrs.)	PAL/96/012 Gender-Sensitive Policies/Institution Cst	Jerusalem	1 month
MOUSTAFA, A.A.	TCP/SUD/6612	Rome, Italy Khartoum, Sudan	2 days 5 months
OMRAN, T.	YEM/92/014 Desertification Control Cst	Rome, Italy Sana'a, Yemen Rome, Italy	2 days (briefing) 26 days 2 days (debriefing)
SAAD, A.H.Y.	TCP/SYR/4553 Team Leader/Senior Expert in Agric. Plan. & Pol. Analysis	Damascus, Syria	24 months

RECRUITMENT OF SHORT-TERM LANGUAGE PERSONNEL
JULY - DECEMBER 1996

INTERPRETERS

<u>NAME</u>	<u>MEETING</u>	<u>PLACE/DATE</u>
HAMZA, Yusr (Mrs.)	Cttee on Constitutional & Legal Matters	Rome, Italy 09.09-10.09.96
ARAFA, Nadia (Mrs.)	Incognito	Rome, Italy 20.09-22.09.96*
ARAFA, Nadia (Mrs.)	Incognito	Rome, Italy 23.09-27.09.96
HAMZA, Yusr (Mrs.)	111th Session of the Council	Rome, Italy 01.10-10.10.96
TAALAB, Aziz	Ditto	Ditto
SHALTOUT, Rifaat	12th NE Forestry Commission	Cairo, Egypt 21.10-24.10.96
ABDEL SAYED, Samira (Mrs.)	Ditto	Ditto
HAMZA, Yusr (Mrs.)	Ditto	Ditto
HEIDAR, Yehia	Ditto	Ditto
ARAFA, Nadia (Mrs.)	Incognito	Rome, Italy 28.10-30.10.96**
HAMZA, Yusr (Mrs.)	WFS	11.11-17.11.96
ARAFA, Nadia (Mrs.)	Ditto	Ditto
IBRAHIM, Zeinab (Mrs.)	WFS	Rome, Italy 15.11-17.11.96
SIRRY, Naglaa (Mrs.)	Ditto	Ditto

* Apologized due to prior commitment.

** Ditto.

ANNEX III (CONT.)

INTERPRETERS (CONT.)

<u>NAME</u>	<u>MEETING</u>	<u>PLACE, DATE</u>
ABDEL SAYED, Samira (Mrs.)	IOFC Cttee for the Dev. & Management of Fishery Resources of the Gulfs	Sharjah, UAE 23.11-26.11.96*
HAMZA, Yusr (Mrs.)	Ditto	Ditto
HAMZA, Yusr (Mrs.)	Reg. Commission on Land & Water Use	Beirut, Lebanon 10.12-15.12.96
ARAFI, Nadia (Mrs.)	Ditto	Ditto

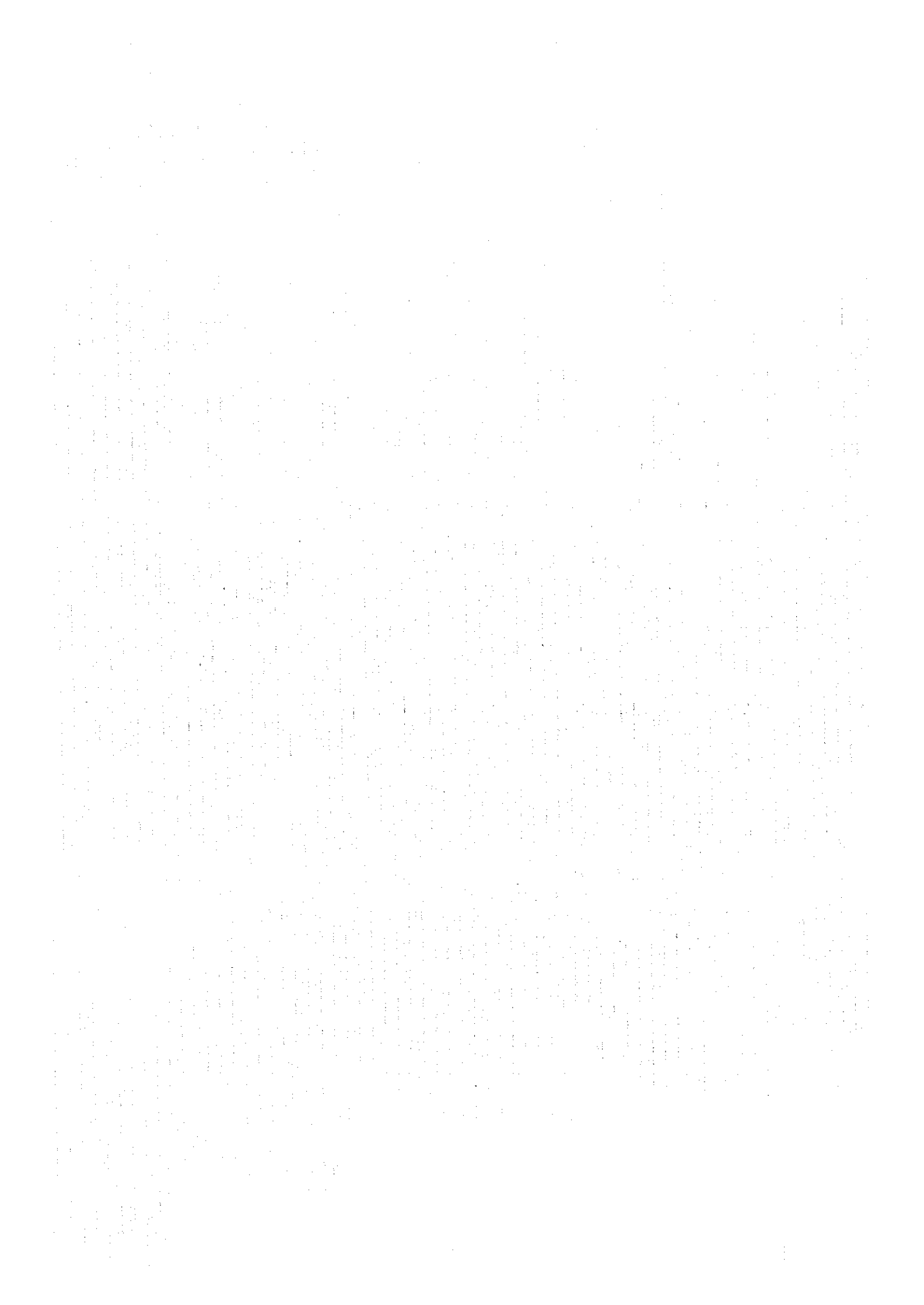
TRANSLATORS/REVISERS

ABDEL MEGUID, Esmat	Council & related meetings Ctee on World Food Security	Rome, Italy 19.09-26.09.96**
EL-GHAZOLY, Osama	Ditto	Rome, Italy 23.09-30.09.96***
ABDEL MEGUID, Esmat	Ditto	Rome, Italy 02.10-09.10.96
ABDEL MEGUID, Esmat	World Food Summit	Rome, Italy 11.11-17.11.96

* Postponed to 1997.

** Changed to start to 20.09.96.

*** Due to too short notice to finalize travel arrangements, he could travel only on 23.09.96.





JICA