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Report Name: Fresh Deciduous Fruit Annual

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Report Highlights:

Egyptian table grape production is forecast to increase to 1.59 million metric tons (MMT) in marketing year (MY) 2024/25 (October 2024 through September 2025). Egyptian exports of table grapes are forecast up by 5.7 percent (185,000 MT) due to new varieties which have improved production and quality. Furthermore, as a result of the August 12, 2024 Official Statement from Egypt's Central Administration for Plant Quarantine (CAPQ), it has made considerable contribution to both production and trade.

Production

Egyptian table grape production is forecast at 1.59 MMT in MY 2024/25, an increase of 20,000 MT over the previous marketing year. This is primarily due to an increase in harvested area (an additional 1,000 hectares (HA)), as new table grape varieties have been introduced, improved cultivation practices (via drip irrigation and protected cultivation) have improved the quality of fruit. As such, it has led to an improvement in total soluble solids (TSS) as well.¹

Grapes are one of the most widely grown fruits in the country, second only to citrus, and are spread across the country from the north to south. Harvest season in Egypt for early grape varieties begins in late May and ends in September, while harvest for late varieties begins in late June and ends in November.

Egyptian agriculture in the Nile Delta is dominated by small scale farming in what is known as the “Old Land,” which is characterized by using traditional practices in cultivation and flood surface irrigation. The “New Land” are lands that have been reclaimed relatively recently. New Lands cover over 2.5 million acres, using latest technologies in irrigation, and are mostly devoted to export markets.

Regional Cultivation of Table Grapes in Egypt:

1. Nile Delta Valley Farming (Old Land Cultivation)

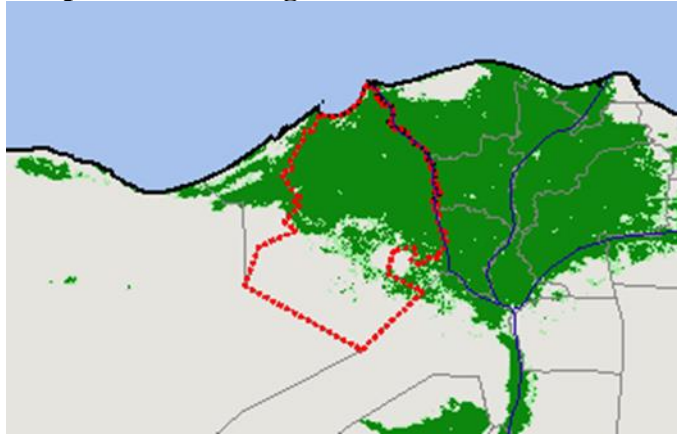
The Nile Delta Valley is dominated by small-scale farms (normally producing on less than one and a half hectares). Most of this production is destined for the local market and tends to be focused on local varieties (such as Fayoumi, and Roumy Ahmer). However, these small-scale farmers, are challenged by increasing input costs, land fragmentation, and urbanization.

2. Reclaimed Desert-Land Farming (New Land Cultivation)

Farms built on reclaimed desert-land tend to be fully integrated agribusinesses focused on exports. These modern farms tend to be large, up to 4,000 hectares or more, and primarily use technology driven production practices, advanced cold chain storage, and large automated packing houses. The Nubaria region (See Map 1) represents the majority of reclaimed desert-land production, accounting for nearly 65 percent of total Egyptian grape production. Egyptian companies continue to expand in grape production due to the high value of exports. Furthermore, the availability of water is not an issue in grape producing areas since varieties are tolerant and drip irrigation systems are applied.

¹ {t}he terms TSS and °Brix are used somewhat interchangeably due to the majority of the soluble solids being sugars”; See <https://store.extension.iastate.edu/product/16075-pdf#:~:text=The%20harvest%20parameter%20of%20total,water%20and%20many%20dissolved%20solids.>

Map 1: Nubaria Region in Behira Governorate



Source: IPAD/FAS/USDA

Table 1: Selected Table Grape Varieties Grown in Egypt

Variety	Description	Harvest Season
Flame Seedless	Red, early cultivar	Mid May-Early June
Crimson	Red, early cultivar	Mid-August
Red globe	Red, late maturity	Mid-July
Early Sweet	White, early season variety	Mid-May
Thompson Seedless	White, medium season variety	Mid-July
Superior	White, early season variety	Mid May-Early June
Autumn Royal	Black, late cultivar	Mid July – Early August
Prime Seedless	Green, early season	Mid May - June
Timco	Red seedless, late season variety	Late August

Source: FAO- Food loss analysis for grapes value chains in Egypt-2021

Large growers are regularly seeking new varieties which are evaluated for their suitability to the soil and environmental conditions. Growers are focused on increasing yields and quality improvements, as well as prolonging the shelf life of their products (especially mid or late varieties). Large exporting farms are also keen to ensure they meet the import requirements of foreign markets, particularly the EU and the United Kingdom, to ensure they remain export competitive.

Planting and Harvesting Dates for Egyptian Table Grapes:

The Egyptian climate is optimal for table grape production. The mild winters, hot summers, and the high number of frost-free, warm growing days across the year, provides optimal conditions for grapevines during the season. The 2024 climate season for table grapes contributed to a very high quality of both white and red grape varieties in terms of size, weight and color. However, excessive heat and drought remain concerns for table grape producers.

Planting season begins the first week of February when cuttings are planted in black polyethylene bags, filled with a mixture of peat moss and sand, and stored in greenhouses before the seedlings are transferred into the open field. The vines start fruiting in their third year.

Acceding to the International Convention for the Protection of New Varieties of Plants:

In December 2019, Egypt became the seventy-sixth member of the International Union for the Protection of New Varieties of Plants (UPOV), which encourages the development of new varieties of plants. Egypt's accession to the UPOV has allowed Egypt to promote and develop new and distinguished varieties of plants. Moreover, it has enabled Egypt to have improved access to novel plant varieties from UPOV member States, which help promote exports of various crops. It has also helped protect the registered Egyptian varieties from exploitation and theft. Joining UPOV has helped improve access to new varieties of fruits and vegetables and has encouraged industry to be more competitive in foreign markets and has also pushed Egypt to increase the development of a domestic breeding program.

Consumption

Domestic consumption of fresh grapes is forecast at 1.41 MMT in MY 2024/2025, slightly above than the previous marketing year. Increased consumption is mainly driven by population growth and an increase in immigrants from neighboring countries, especially Sudan. Domestic consumption of grapes in Egypt is largely supported by domestic production and the competitively priced compared to other fruit like mangos which is also a major summer crop. Additionally, Egyptian grapes are more popular among the domestic consumers as they are sweeter, and thus more appealing to the Egyptian population. Consumers can also easily buy a wide range of local varieties at more competitive prices than imported grapes.

The local grape market is an important market for producers that do not export their product or for exporters who allow some of their product to enter the local market after fulfilling their export contracts. Open markets remain the leading buying channel for table grapes in Egypt, especially in rural areas. Sales of grapes in open markets are affected by seasonality as they mostly sell fresh in open packages.

While farmers cultivating table grapes for the local market and their own personal consumption tolerate some blemishes or bruises, more attention is applied to meet quality standards and for high-end markets.

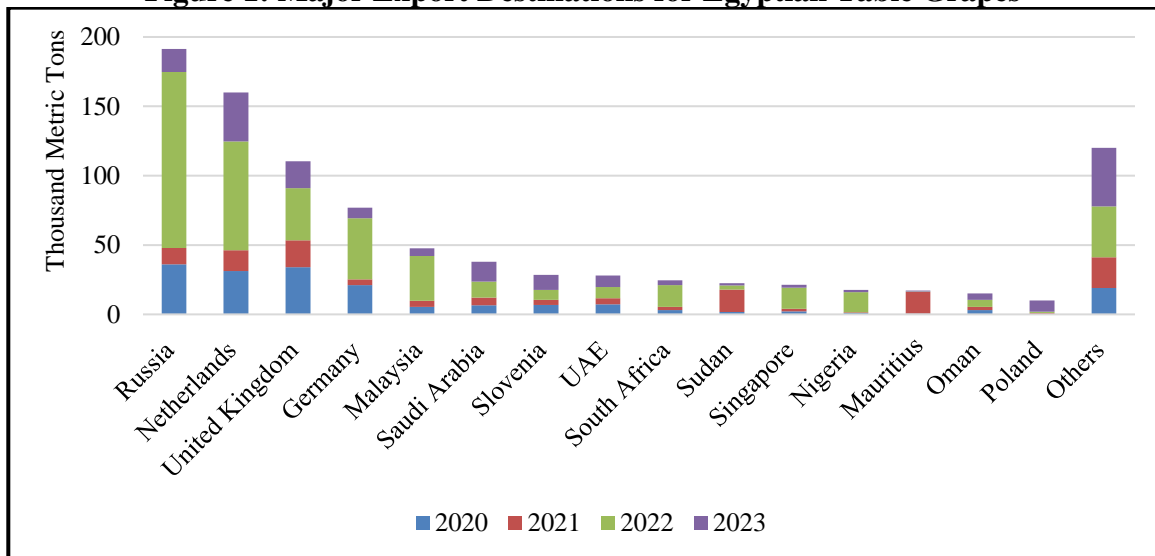
Trade

Exports for MY 2024/25 exports of fresh table grapes are forecast at 185,000 MT, up by 5.7 percent than the previous marketing year. Higher exports are driven by a higher quality of table grapes amid better varieties for farms focused on exporting. An increase in exports is also driven by an increased understanding of consumer preference in major export destinations and establishing higher standards in those markets. Despite higher costs of production, inflation, and high trucking costs (due to competition in the use trucks for exporting other crops), table grape exporters focused on enhancing quality to guarantee them a good place in major markets in MY 2023/24.

To address freight challenges, the Government of Egypt (GOE), along with the private sector partners, is investing in developing cold chain logistics to facilitate increased access to the EU market. To do so, the GOE has signed an agreement with Italy for the transport of fresh produce and other goods through a roll-on/roll-off (Ro-Ro) system with a capacity of 420 trucks per week between the ports of Damietta and Trieste.² As a result, the transportation times of the goods between Trieste and Damietta will be reduced to sixty hours, and take place on a bi-weekly basis.³

Egyptian table grape exports have increased during the past four years due to increased demand by major markets (such as Russia, United Kingdom and EU) and improvements in the brix level, size, color and taste of Egyptian grapes. The top five export destinations from 2020-2023 were Russia, the Netherlands, the United Kingdom, Germany and Malaysia (See Figure 1).

Figure 1: Major Export Destinations for Egyptian Table Grapes



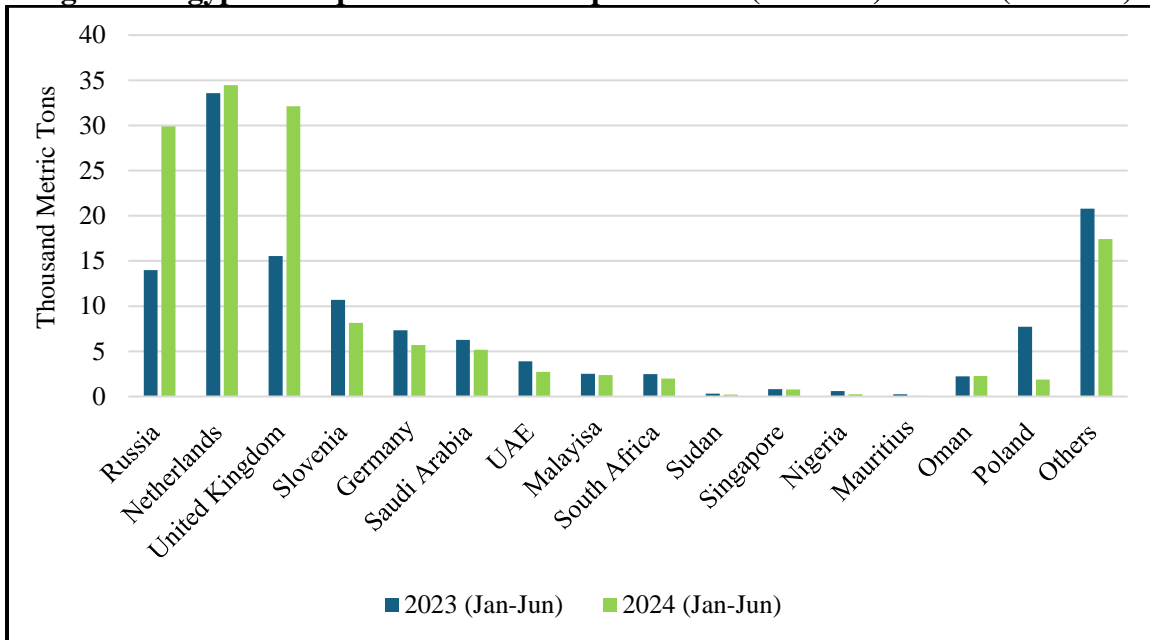
Source: Trade Data Monitor, LLC

Egypt’s exports in 2024 (January - June) increased by 12.7 percent compared to the same period in 2023. This increase is attributed to significant rise in exports to Russia and the United Kingdom, both of which are major markets of Egyptian grapes, and have received less competition from India and Spain (See Figure 2).

² <https://english.ahram.org.eg/News/516281.aspx>

³ <https://www.agenzianova.com/en/news/Egypt-Italy-signed-in-Cairo-the-agreement-for-the-Trieste-Damietta-maritime-line/>

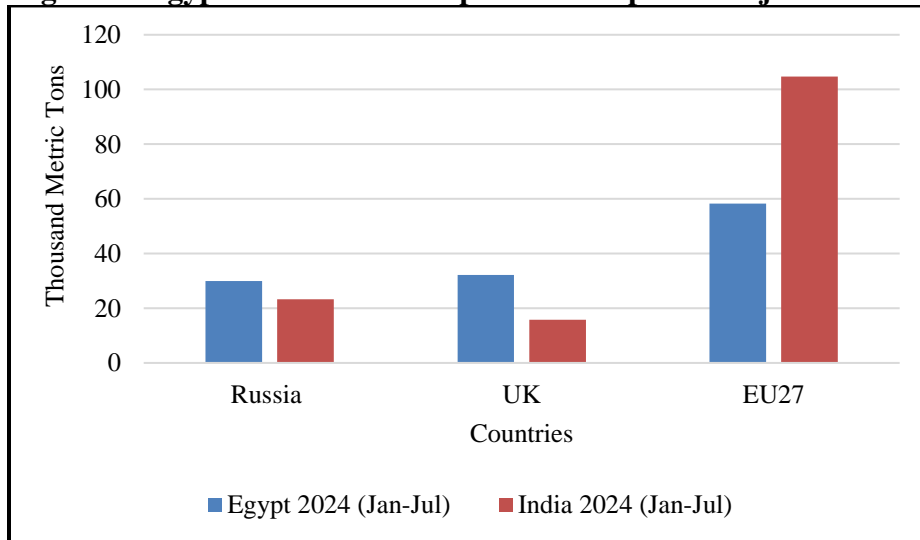
Figure 2: Egyptian Exports of Table Grapes in 2023 (Jan-Jun) vs 2024 (Jan-Jun)



Source: Trade Data Monitor LLC

Due to this past year’s Red Sea crisis from Houthi attacks on vessels, exporters were hesitant to ship grapes to the Far East in due to the long transit times around the Cape of Good Hope (which can be as long as 30 or 40 days for some destinations), in addition to an increase in costs of containers and freight. On the other hand, the Red Sea crisis affected Indian exports of table grapes to the United Kingdom and Russia (see Figure 3). India is a major competitor to Egypt in the EU, Russia and United Kingdom markets. This competition however mainly depends on the variety and arrival in the season.

Figure 3: Egyptian vs. Indian Exports of Grapes to Major Markets



Source: Trade Data Monitor LLC

Egyptian Imports of Fresh Table Grapes:

Egypt imports a very small volume of table grapes which are usually sold at very high prices and at specialty retail stores. In MY 2024/2025, Egyptian imports are expected to remain low at 2,000 MT, unchanged from the previous marketing year. Most table grape imports are mainly from Lebanon. In MY 2023/24 (Oct-Jun) imports amounted to almost 1,600 MT, with almost 92 percent of this amount coming from Lebanon. However, as the regional crisis between Israel and Hezbollah continues, the more likely Egyptian fruit importers will seek grapes from other neighboring countries (Turkey or Syria). The imported table grapes are usually sold at very high prices and at specialty retail stores.

Policy

On August 12, 2024, Egypt's CAPQ issued an Official Statement related to Egypt's accession to the UPOV and Circular No. 29 (dealing with the registration and coding of grape exporting farms, and the issuance of plant health certificates for grape variety and intellectual property (IP) rights). The Official Statement (see Appendix 1) created further procedures to protect the IP rights of grape varieties. As a result, for any suspicious infringement of IP, samples are collected at any stage in the supply chain and a DNA fingerprint is taken to CAPQ labs to ensure compliance with the IP protection regulations.

The measures taken by CAPQ hope to ensure a national strategy to protect intellectual property rights and ensure Egyptian exports of grapes meet the requirements set by the EU and importing nations rules and guidelines.

The Official Statement lists the following instructions for industry:

1. Exporting Farms

- It is forbidden to deal with unlicensed grape nurseries or any nursery which does not have the right to propagate or sell any protected material according to the Plant Variety Protection Certificate issued by the Central Administration for Seed Testing and Certification (CASC).
- Must ensure the source of grape seedlings before planting to guarantee the ability to export the crop; otherwise CAPQ will not offer a code to export.

2. Packing Houses and Export Companies

- Must ensure that before packing and exporting, the farms have the necessary licenses to plant protected material.
- Companies and packing houses must have a license to export.
- Must ensure companies and packing houses are recorded as a company which holds a Plant Variety Protection Certificate.

CAPQ's Orders for All Stakeholders:

- Samples will be taken across the value chain when suspected of any property rights infringement.
- DNA fingerprinting is required for all samples in CAPQ labs.
- Must stop the violating stations or farms from exporting.

The measures taken by CAPQ ensures activating the national strategy of intellectual property rights and respecting the relevant laws associated and ensuring Egyptian exports of grapes meet the requirements set by the EU and importing nations rules and guidelines.

Stressing the Relevance of Plant Variety Protection by Private Industry:

Both the Horticulture Export Improvement Association (HEIA) and the Agricultural Export Council (AEC) distributed letters to its members emphasizing that table grape growers, exporting farms, packing houses and exporting companies should avoid using any protected material if they do not have the necessary license to do so, per the Egyptian law of intellectual property rights and the recent CAPQ circular. Both letters urged stakeholders across the value chain to avoid dealing with unlicensed plant material which does not have the right to market or sell protected varieties, in order to avoid lawful suits by variety owners which could cease their operations and exports. For more information, please see the attached letters herein which inform industry of the Official Statement.

Grapes, Fresh Table Market Year Begins	2022/2023		2023/2024		2024/2025	
	Oct 2022		Oct 2023		Oct 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Egypt						
Area Planted (HA)	75600	75600	76000	76000	0	76000
Area Harvested (HA)	71400	71400	71800	72000	0	73000
Commercial Production (MT)	1560000	1560000	1568000	1573000	0	1593000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	1560000	1560000	1568000	1573000	0	1593000
Imports (MT)	2000	2000	2000	2000	0	2000
Total Supply (MT)	1562000	1562000	1570000	1575000	0	1595000
Fresh Dom. Consumption (MT)	1392000	1392000	1400000	1400000	0	1410000
Exports (MT)	170000	170000	170000	175000	0	185000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	1562000	1562000	1570000	1575000	0	1595000
(HA),(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Appendix 1—CAPQ Official Statement on Grape Varieties and IP Protection

بيان رسمي الإدارة المركزية للحجر الزراعي

القاهرة: ١٢ أغسطس ٢٠٢٤

استناداً إلى:

- قانون الزراعة المصري رقم ٥٣ لسنة ١٩٦٦ وتعديلاته
- القانون رقم ٨٢ لسنة ٢٠٠٢ بشأن حماية حقوق الملكية الفكرية
- الاتفاقية الدولية لحماية الأصناف النباتية الجديدة (اتفاقية اليوبوف)
- شهادات الحماية الصادرة عن مكتب حماية الأصناف النباتية
- القرار الوزاري رقم ٣٨٦ لسنة ٢٠٢١ بشأن تكويد المزارع والمحطات التصديرية
- المنشور رقم (٢٩) بتاريخ ٢١ أغسطس ٢٠٢٢ بشأن قواعد تكويد المزارع التصديرية وإصدار شهادات الصحة النباتية للأصناف المحمية من العنب

تهيب الإدارة المركزية للحجر الزراعي بالسادة التالي ذكرهم بالالتزام بما يلي:

١. أصحاب المزارع التصديرية :
 - عدم التعامل مع مشاتل غير مرخصة أو ليس لديها حقوق إكثار أو بيع شتلات لأصناف محمية بموجب شهادة الحماية الصادرة عن مكتب حماية الأصناف النباتية بالإدارة المركزية لفحص واعتماد التقاوى .
 - التأكد من مصدر شتلات العنب قبل الزراعة لتجنب إيقاف التعامل مع الحجر الزراعي وعدم القدرة على تصدير المحصول.
٢. الشركات المصدرة وأصحاب المحطات إلى :
 - التأكد قبل التعبئة والتصدير من أن المزارع المصدرة لديها تراخيص لزراعة الأصناف المحمية.
 - الحصول على ترخيص لتصدير الأصناف المحمية.
 - التأكد من وجودهم على القائمة البيضاء للشركات صاحبة حقوق الملكية الفكرية.

كما نود احاطتكم علماً بأن الإدارة المركزية للحجر الزراعي ستقوم بـ :

- أخذ عينات من كافة مراحل العملية التصديرية عند الاشتباه.
- إجراء تحليل البصمة الوراثية للعينات في معمل الحجر الزراعي.
- إيقاف أكواد المحطات أو المزارع المخالفة ومنعها من التصدير.

وتهدف هذه الإجراءات الي:

- حماية سمعة الصادرات المصرية.
- تفعيل رؤية الاستراتيجية الوطنية لحماية الملكية الفكرية واحترام القوانين الخاصة بحماية الملكية الفكرية .
- تجنب فرض قيود إضافية من الدول الأجنبية على واردات العنب المصري.

كما نود التأكيد على أهمية الالتزام بهذه التعليمات لضمان استمرارية وتطور الصادرات الزراعية المصرية.

رئيس الإدارة المركزية للحجر الزراعي

د/ محمد المنسي



Attachments: [Agricultural Export Council-Arabic.pdf](#)

[Agricultural Export Council-Unofficial Google Translation.pdf](#)

[Horticultural Export Improvement Association Arabic.pdf](#)

[Horticultural Export Improvement Association Unofficial Google Translation.pdf](#)