Economic Analysis of Egyptian Potato Export in the Main Foreign Markets

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I. Introduction

Potato is one of the most important crops in Egypt, in terms of export - manufacturing - food. Egypt ranks fourteen in production and fifth in exporting at global level. Developing agricultural exports is one of the main pillars of the Egyptian agricultural development policy, where the Egyptian agricultural export value represents 16 % of total export value and the Potato export value represents 4.2 % of the total agricultural export value in 2018 according (ITC) data. Potato also is an important part of human food item and alternative to grains and an important source of national agricultural income besides access foreign exchange to drive and increasing Economic development and Egyptian agricultural export return.

I. Study problem

The research problem lies in the low-level in marketing efficiency in the external markets of this important crop, as well as the problem facing exportation. Therefore, studying the external markets for potato exports and estimation of some indicators to identifying the Prevailing conditions in these markets, especially the status of competitors and price levels under the two periods of study.

II. Study objective

The aims of this research is to find out the status of Egyptian potatoes exports and measuring its competitiveness in the main competing countries to international markets imports Egyptian potato .in preparation to puts necessary policies, to enhance Egyptian potato export competitiveness among markets within the study, with a high degree of stability in the long run.

The specific objectives are as follows:

(1) Identify the current Status of Egyptian potato export, (2) Ranking of Egypt according to world potato export.,(3) Studying the main Egyptian potato importers, (4) Shows the main constrains facing exportation ,(5)Identify marketing efficiency through study and analysis indicators of Egyptian potato in competitive markets ,(6) Proposed and suggestion policies to improve Egyptian potato exports.

III. Methodology & Data

The study method based on calculating the main seven indicators (Market share - penetration rate - export strength - dependency on export - Revealed

comparative advantage - Productive Competitiveness - Price Competitiveness), and analyze some data depending on Regression Analysis.

- **Market share Indicator**

The market share used to measure the competitiveness of a specific crop in a market or in the global market, it calculated from the following formula.-

$$MS_{EK} = \frac{X_{EK}}{X_K} * 100$$

Whereas:-

$\mathbf{MS_{EK}}$ Egyptian potato Market share in Market K,$\mathbf{X_{Ek}}$**:** Egyptian potato export to market k,$\mathbf{X_k}$**:** country K imports from Potato.

This indicator expressed the fact that it reflects the attractiveness of the commodity in the external market. However, it was affected by the export price changes, because the high price of the commodity leads to decrease in its market share, despite the continued competitive advantage.

- **Penetration Rate Indicator**

It is calculate for the most important markets for the commodities under study. The higher ratio, the more evidence that the penetration rate for that commodity has increased in markets under study... calculate from the following formula:

$$MPR_{EK} = \frac{I_{JK}}{Q_K + I_K - E_K}$$

Whereas:

Ijk: Market K imports from country J $\mathbf{I_k}$: Market K imports from potato

$\mathbf{Q_k}$: market k (potato production) $\mathbf{E_k}$: Market k export from potato

- **Export Strength**

$$\frac{Total\ Export_{KJ}}{Total\ Production_{KJ}}$$

It calculate from formula:

K: the country **J:** commodity (Potato)

- **Dependency on Export :**

$$\frac{Total\ Export_{KJ}}{Total\ Export_{KJ} + Total\ Production_{KJ}}$$

It calculate from formula:

K: the country **J:** commodity (Potato)

- **Revealed Comparative Advantage (RCA) Indicator**

The scale of the comparative advantage indicates the potential opportunities for expanding trade and gives a rough future exports picture of the country under study, by comparing the country's share of global exports of a particular commodity or crop.

With a total share of agricultural exports of that country from total or agricultural exports globally. In addition, when the value of this indicator is greater than one, this indicates that the state has a revealed comparative advantage from that commodity or crop. However, if it is less than one; this indicates that this country suffers from a relative weakness in the revealed advantage of the commodity, and can calculate it by the following equation:

$$RCA_J = \frac{X_J}{X_{JA}} / \frac{X_W}{X_{WA}}$$

Whereas:

X_J: country's exports value (j) from potato
X_{JA}: Total value of the country' agriculture export.
X_W: total value of world potato exports
X_{WA}: Total value of world agricultural exports.

- **The Price Competitiveness Indicator**

The export price is an important indicator for the possibility of attracting more import markets in light of the qualitative convergence in the exporting commodity, to its counterpart in other exporting countries. The lower the export price compared to its counterpart in other competing countries. This means that there is a price advantage for the exporting commodity and better competitiveness. The export price not only reflects the production costs of the commodity, but also affected by other factors, such as transport costs, taxes, the date of export and other costs associated with the export process, which have become more influential on the export price than production costs.

$$P_{AJ} = \frac{P_C}{P_J}$$

Whereas:

PAj: the average of export price between the most important competing countries as a whole in the international market or (in the market being under study) of the crop under study to the export price of the crop in the country j that is studying in the global market, or (in the market being studied).

Pc: the average of crop export prices in the most competitive countries as a whole, whether in the global market or in the market being studied.

Pj: crop export price in country j in the global market or in the market under studied.

- **Production competitiveness indicator**

This indicator is calculate:

Calculating the relative position of production between country production j, and the total production of the most important competing countries within global market (or a specific market) for a product, using the following formula:

$$QB_J = \frac{Q_J}{Q_W}$$

Whereas:

QBj: The ratio between country production (j) to total production of the most important competing countries as a whole in the global market or in the studied market for the studied crop.

Qj: country (j)production from studied crop.

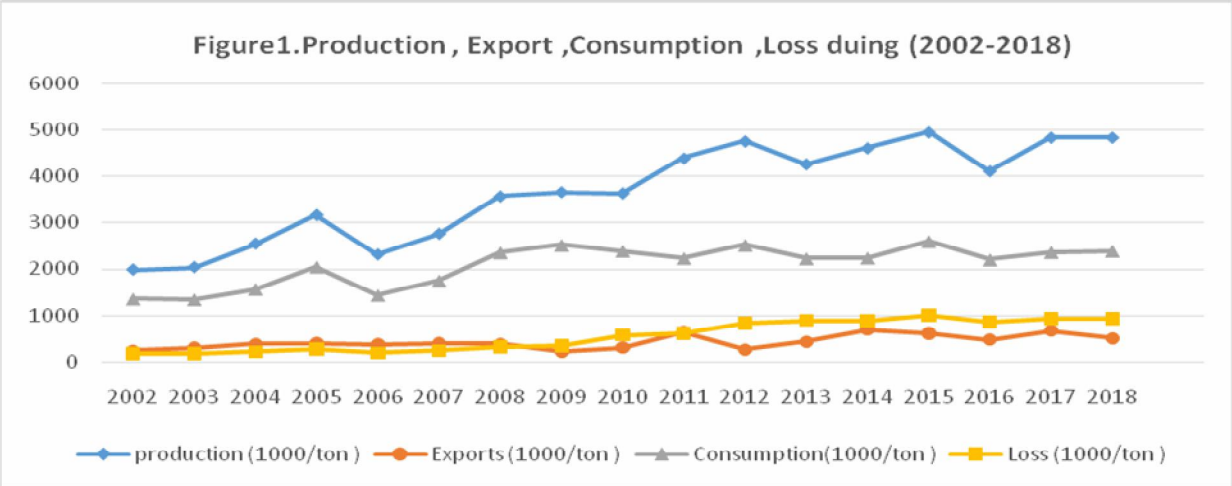
Qw: Total crop production studied in the most important competing countries within the global market or in the studied market.

Research data (production, consumption, and loss)is based on the Ministry of Agriculture, FAO Economic Conferences and publications, (Egyptian's potato Export and other countries quantity, price, value) from ITC. The other data are from (CAPMAS) - reference to previous references and studies related to research. it is also depend on divided the period into two periods (2002-2004) (2016-2018) to compare what happens during these two periods especially during the second period according to what has happen in exchange rate liberalization.

IV. Results &discussion

1. The Current status of Egyptian potato export during (2002-2018)

Figure (1) shows the relation between potato production, export, consumption and losses. Potato production is ranged between minimum 1985 thousand ton in 2002 and maximum 4841 in 2018 with an average 3673 thousand ton and a growth rate of 5.6 %. Export reached the lowest level 215.1thousand tons in 2009, and the highest-level 684.7 thousand tons in 2014 with an average 385 thousand tons and growth rate 4.5% which its represent 11.8 % of total potato production average. The export value is represented 155 million dollars as an average during (2002-2018) with a growth rate of 10.5%. It was clear from data in table 1, there is increasing with growth rate reached 12.5% in potato losses, which is represented 15 % from total potato production average during period under study and this is due to inefficiency of the operations from the beginning of crop cultivation level to reach end-user (consumer).



Source: **Table Annex 1.**

Table 1. General time trend equations of potato production, Consumption, Export and loss during period (2002 – 2018)

	Variable	R^2	F	Average	Growth rate %
1	Production	0.83	74.4**	3673	5.6
2	Export	0.40	10.25**	424	4.5
3	consumption	0.60	22.5**	2090	3.4
4	Loss	0.90	140.7**	558	12.5

Where Ý: The estimated value of the variable under study,
Xi: the time variable where i = (1, 2, 3,----, 15)
Value in brackets indicate the value of (T) calculated
(R^2) coefficient of determination '(F) moral model (**))refers to the significant level (1%)
(*) refers to the significant level (5%) (-) refers to the lack of significant
Source: estimated from table annex (1).

2. Ranking of Egypt in terms of World Potato Export

Table 2 shows in the first period the Netherlands, Germany, France, Belgium, Canada and USA, they were ranked from first to sixth as top potato exporter's countries in the world with average 1846, 1365, 1314, 939, 468, 388 thousand ton and their market share 20.6%, 15.2%, 14.7%, 10.7%, 5.2%, 4.3% respectively. While Egypt has come in the seventh rank with average, 302 thousand ton and its market share 3.4%. In the second period, France comes in first rank with average 2079 thousand ton and its market share increase from 14.7 % to 16.2 % instead of Neither and that comes in the third rank with decreasing in its market share from 20.6% to 14.6%. Germany and Belgium, they are still in their ranking in the first period among the most exporter's countries. Egypt comes in the sixth rank instead of the seventh rank, which showing increasing in market share from 3.4% to 4.3%.this means Egypt enhanced its competitiveness among the exporter's countries lately.

Table 2. Ranking of Egypt in terms of world potato export (2002-2004) (2016-2018)

	2002-2004			2016-2018		
Rank	Country	Quantity Average (Ton)	%	Country	Quantity Average (Ton)	%
1	Netherlands	1,846,421	20.6	France	2,079,416	16.2
2	Germany	1,365,042	15.2	Germany	1,896,164	14.8
3	France	1,314,811	14.7	Netherlands	1,867,851	14.6
4	Belgium	939,696	10.5	Belgium	971,028	7.6
5	Canada	468,706	5.2	Iran	563,284	4.4
6	USA	388,004	4.3	Egypt	549,026	4.3
7	Egypt	302,293	3.4	Canada	534,197	4.2
8	Spain	260,752	2.9	USA	505,818	3.9
9	United Kingdom	235,904	2.6	India	298,806	2.3
	Others	1,849,914	20.6	Others	3,543,348	27.7
	Total	**8,971,543**	**100**	Total	**12,808,939**	**100**

Source: Own calculation using raw data from ITC data.

3. The main Egyptian potato Importers during two periods(2002-2004) (2016-2018)

According to Table 3 the Greece, Italy, Germany, Lebanon, Russia, they are the top five Egyptian potato importers with average 72.9, 59.5, 54.6, 44.1,14.9 thousand ton and relative importance 24.1% ,19.7% , 18.1% , 14.6% , 4.9% respectively during period (2002-2004). While in the second period (2016-2018) Russia, Greece, Lebanon, Italy, UAE, they are ranking, from first to fifth with value 205.8, 57.6, 53.4, 52.5, 38.8 thousand ton and relative importance 37.5%, 10.55, 9.7 %, 9.6 %, 7.1%. Russia steps forward in the first rank instead of Germany, which is ranking sixth in the second period. UAE shows from the top five Egyptian potato importers in the second period. Italy, Lebanon, Russia, Greece, are still among from top five importers of Egyptian potatoes, with different ranking during the two periods. When estimation the compound growth rate, Russia & UAE comes first and second rank with value 19%, 16.7% after that comes Kuwait, Oman, united kingdom, Greece and Lebanon from third to seventh, while it decreases in Italy & Germany.

Table 3. The main Egyptian potato Importers during two periods (2002-2004) (2016-2018)

Rank	Country	2002-2004 Quantity average	%	Country	2016-2018 Quantity average	%	Country	CAGR% from 2003-2017
1	Greece	72,973	24.1	Russia	205,867	37.5	Russia	19
2	Italy	59,591	19.7	Greece	57,667	10.5	Greece	1.5
3	Germany	54,601	18.1	Lebanon	53,423	9.7	Lebanon	0.27
4	Lebanon	44,144	14.6	Italy	52,569	9.6	Italy	-1.3
5	Russia	14,909	4.9	UAE	38,838	7.1	UAE	16.7
6	United Kingdom	13,934	4.6	Germany	32,002	5.8	Germany	-4.8
7	Romania	6,667	2.2	Kuwait	23,208	4.2	Kuwait	16.3
8	Belarus	5,812	1.9	Oman	14,408	2.6	Oman	15.0
9	Europe Othr.Nes	4,521	1.5	United Kingdom	9,493	1.7	United Kingdom	3.2
10	Tunisia	4,212	1.4	Slovenia	7,296	1.3		
	Others	20,928	6.9	Others	54,254	9.9		
	Total	302,292	100	Total	549,025	100		

CAGR%= {(end value / start value) 1/n - 1}, which end value (2017), start value (2003), n = years (from 2003 to 2017) as average in both two periods.

Source: Own calculation using raw data from ITC data

4. The main constrains facing exportation.

The main constrains facing exportation are classified to five groups (Technical and productive, Financial and banking, Organizational, Supportive service, Marketing and promotional) as shown in table 4.

Table 4. The main constrains facing exportation

Technical and productive	Financial and banking	Organizational	Supportive service	Marketing and promotional
1- Lack in quality control systems & agricultural extension role.	1. The reluctance of commercial banks to finance exports, especially non-traditional ones,	1. Lack of government agency working to improve the efficiency of the Egyptian marketing system.	1. Low in absorptive capacity.	1. Weakness of Egyptian advertising and promotion services.
2. Absence of (R&D).	2. Lack in adequate financial resources on concessional terms to finance exports.	2. Overlap and repetition of procedures.	2. The long period for charging and discharging shipment.	2. Absence of international marketing entities that work to serve exporters and promote Egyptian products abroad.
3. Absence of international accreditation for Export and import laboratories role	3. High fees rate in various services and airfreight.	3. Decreasing the number of centers that provide consulting services to raise the efficiency of exportation.	3. Inadequate transport services at Egyptian ports and airports.	3. Absence of permanent centers for displaying and marketing Egyptian commodities in international markets.
4. Low quality in packaging.			4. Insufficient fleet of aircraft with large tonnage suitable for the exported quantities.	
5. Low quality in agricultural inputs, which lead to produce outputs are not meet market's needs.				
6. Lack in availability of marketing information database for Egyptian goods demand.				

Source : Exporters and Producers, 2019.

5. Marketing efficiency through studying the economic indicators of Egyptian potato in competing countries

- **Market share and penetration Rate Indicator**

The analysis results from Table 5 shows that, Market share and penetration rate of Egyptian potato exports among competing countries in Egyptian potato importer markets during the two periods (2002-2004), (2016-2018), in Russia Market, Egypt comes in the third rank with a market share 5.7% and penetration rate 0.0004. While

in the second period, it ranks first with an increase in its market share to 68% and the penetration rate of 0.0087. In Italy Market, Egypt ranks fourth in both two periods with clear decreasing in market share 13.4% to 9.0%, and penetration rate from 0.0377, to 0.029. In the Lebanon market, Egypt is still, remain as the first rank in both two periods with increasing in market share 67.3%, 69.5% and penetration rate 0.133, 0.157 respectively. In the Greek market, Egypt also remains as first in both two periods with increasing in market share 36.1%, 39 % and penetration rate 0.044, 0.093.

Table 5. Market share and penetration rate of Egyptian potato exports to the main Markets during the two periods (2002-2004), (2016-2018)

Russia market						Italy Market					
2002-2004 average			2016-2018 average			2002-2004 average			2016-2018 average		
Country	MS%	MPR	Country	MS%	MPR	Country	MS%	MPR	Country	MS%	MPR
Netherland	36.885	0.0031	Egypt	68.064	0.0087	France	48.538	0.137	France	48.899	0.152
Azerbaijan	7.17	0.00041	China	15.463	0.0018	Netherland	17.122	0.0481	Germany	20.046	0.063
Egypt	5.750	0.0004	Azerbaijan	13.688	0.0016	Germany	14.976	0.0420	Netherland	14.16	0.044
China	5.673	0.00031	Netherland	1.411	0.0001	Egypt	13.416	0.0377	Egypt	9.32	0.029
Greece Market						**Lebanon Market**					
2002-2004 average			2016-2018 average			2002-2004 average			2016-2018 average		
Country	MS%	MPR	Country	MS%	MPR	Country	MS%	MPR	Country	MS%	MPR
Egypt	36.08	0.0453	Egypt	39.8	0.104	Egypt	67.35	0.1336	Egypt	72.43	0.154
France	18.74	0.0223	Cyprus	18.481	0.0441	Netherland	21.37	0.042	Netherland	19.89	0.040
Netherland	15.85	0.02	Netherland	9.36	0.02	France	2.83	0.005	France	3.73	0.006
Cyprus	3.748	0.0047	France	8.9	0.022	Belgium	2.30	0.0044	Belgium	2.45	0.0049

Source : Own calculation using raw data from: ITC&FAO

- **Export strength Indicator:**

As showing in table 6, the export strength value to the main countries competing Egypt during two study periods (2002-2004) (2016-2018). In the first period, Cyprus has come in the first rank with value 0.6563. This is indication of exporting large quantities in relation to its production of potato. Followed by Belgium and the Netherlands were come in the second and third rank, reached 0.3290, 0.2610 respectively. Followed by France, Egypt, Germany, Azerbaijan, and China from fourth to the eighth, where their values reached 0.1931, 0.1368, 0.1204, 0.0154, and 0.0022. In the second period, Cyprus is still in the first rank, which reaches 0.8095; this indicates that Cyprus besides exporting its potato production and re-exporting potato by importing it from countries producing. France comes in the second rank instead of Belgium, where export-strength value 0.2822. Then, the Netherlands, Belgium, Germany, Egypt, Azerbaijan and China come from third to eighth, where the export strength value reach 0.2614, 0.2405, 0.1655, 0.1191, 0.0571, 0.0029. It was noted that the value of the export strength has been decreased in Egypt and Belgium, although they are one of the strongest countries exporting and importing potatoes in the world, but at the same time, it is one of the most consuming countries for potatoes, as it depends heavily on their food and their entry into many industries.

Table 6. The Export strength in the most competing countries, in main markets that import Egyptian potatoes during the two periods (2002-2004) (2016-2018)

Year	Egypt	Netherland	Germany	France	Belgium	china	Azerbaijan	Cyprus
2002	0.1156	0.2567	0.1250	0.1539	0.3029	0.0018	0.0016	0.6910
2003	0.1453	0.2866	0.1348	0.2292	0.3850	0.0024	0.0156	0.6544
2004	0.1497	0.2396	0.1012	0.1963	0.2991	0.0025	0.0290	0.6235
First period average	**0.1368**	**0.2610**	**0.1204**	**0.1931**	**0.3290**	**0.0022**	**0.0154**	**0.6563**
2016	0.1150	0.3050	0.1659	0.2744	0.2863	0.0041	0.0421	0.9621
2017	0.1386	0.2460	0.1702	0.2776	0.2203	0.0000	0.0624	0.8287
2018	0.1037	0.2333	0.1605	0.2946	0.2150	0.0044	0.0669	0.6378
Second period average	**0.1191**	**0.2614**	**0.1655**	**0.2822**	**0.2405**	**0.0029**	**0.0571**	**0.8095**

Source : Own calculation using raw data from: (export data) from ITC data, (production) from FAO data

- **The Dependency on Export Indicator**

Table 7 shows that, in the first period, Cyprus was come first in terms of dependency on export, with value 0.3961, and this is evidence that it is depended on export a large amount of its potato production. Belgium came in the second rank where the value reached 0.2469. Followed by Netherlands, France, Egypt, Germany, Azerbaijan, and China, from third to eighth, were reached 0.193, 0.2068, 0.1613, 0.1202, 0.1073, 0.0328, 0.0043, and 0.0022. In the second period, Egypt comes in first, where is reach 0.8937. Followed by Cyprus and France, in the second and third rank respectively, where their value reaches 0.4443, 0.2200. Followed by the Netherlands in the fourth rank with value 0.2068. While Belgium, Germany, Azerbaijan, and China comes in late ranks from fifth to eight, where their value reaches 0.1934, 0.1420, 0.0540, 0.0029, respectively.

Table 7. Dependency on Export in the most competing countries in the main markets, which import Egyptian potatoes during the two periods (2002-2004) (2016-2018)

Year	Egypt	Netherland	Germany	France	Belgium	China	Azerbaijan	Cyprus
2002	0.1036	0.2043	0.1111	0.1334	0.2325	0.0017	0.0016	0.4086
2003	0.1269	0.2228	0.1188	0.1865	0.2780	0.0024	0.0154	0.3956
2004	0.1302	0.1933	0.0919	0.1641	0.2302	0.0025	0.0282	0.3840
First period average	**0.1202**	**0.2068**	**0.1073**	**0.1613**	**0.2469**	**0.0022**	**0.0151**	**0.3961**
2016	0.8968	0.2337	0.1423	0.2153	0.2226	0.0043	0.0404	0.4903
2017	0.8782	0.1974	0.1455	0.2173	0.1806	0.0000	0.0588	0.4532
2018	0.9060	0.1892	0.1383	0.2275	0.1769	0.0044	0.0627	0.3894
Second period average	**0.8937**	**0.2068**	**0.1420**	**0.2200**	**0.1934**	**0.0029**	**0.0540**	**0.4443**

Source : Own calculation using raw data from: ITC&FAO.

- **Revealed Comparative Advantage (RCA) Indicator**

Table, (8) shows that, Cyprus ranks first in both two periods 30.08, 39.13. Egypt ranked second 25.31% in the first-period average, while it was decreasing to 15.69 in second-period average. The rest of the competing countries ranked from third to eight Azerbaijan, Netherlands, France, Belgium, Germany, China, in first period with value 4.32,30.6,2.36,1.55,1.33,0.30 while in second period Azerbaijan, France, Netherlands, Belgium, Germany, China from third to eighth place with average 12.90, 3.21, 2.97, 1.66, 1.59, 1.24.

Table 8. The Revealed Comparative advantage of Egyptian potato exports and competing markets in the most important market during the period (200٢-2004) (2016-2018)

Year	Egypt	Cyprus	Netherland	Germany	France	Belgium	China	Azerbaijan
2002	27.49	20.74	3.33	1.37	1.98	1.48	0.22	0.56
2003	23.26	32.97	2.87	1.28	2.41	1.51	0.31	4.74
2004	25.17	36.53	2.99	1.34	2.67	1.65	0.39	7.66
First period average	**25.31**	**30.08**	**3.06**	**1.33**	**2.36**	**1.55**	**0.30**	**4.32**
2016	11.73	43.22	3.15	1.51	3.32	1.77	1.12	10.07
2017	19.86	39.50	2.90	1.64	3.04	1.64	1.35	13.48
2018	15.48	34.68	2.86	1.63	3.26	1.57	1.24	15.15
Second period average	**15.69**	**39.13**	**2.97**	**1.59**	**3.21**	**1.66**	**1.24**	**12.90**

Source: Own calculation using raw data from: ITC&FAO.

- **The Price Competitiveness Indicator**

Results in table 9 shows that Egypt has price competitiveness in Russia and Greece markets in the first period with value 0.897, 0.804 and decreasing in second period to 0.602, 0.687 this indication that the Egyptian potato export price low compared to other competing countries in those markets . While in Lebanon market, it is increasing in second period from 0.326 to 0.655 and this indication that Egyptian price for potato export high when compare it to other competing countries in this markets. In Italy, market there is no price comediennes, it was reached 1.271 in the first period and increasing in second period to 1.419 and it is indicates that our opportunity decreases in this market.

- **Production competitiveness indicator**

The result shows that the value in Russia market reached 0.028 in first period while in the second period reached 0.043, which is indicates Egypt has productivity competitiveness compared to other countries in this market. While in the Italy market, the value has reached 0.081 in the first period while it is increasing in the second period to 1.163 and this indication that Egypt has production competitiveness compared to other countries for this crop in this market in the first period compared to the second period. In the Lebanon market, productivity competitiveness has reached 0.130 during first period and it is increasing to 0.246 in the second period.

On the Greek market, it was reached 0.155 while the ratio increased to 0.313 in the second period, which indicates Egypt has production competitiveness productive compared to countries competing with it in this market (Table 9).

Table 9. The price and Production competitiveness indicators in main Markets that import Egyptian potato during two period (2002-2004) (2016-2018)

	price competitiveness	Production competitiveness	price competitiveness	Production competitiveness	price competitiveness	Production competitiveness	price competitiveness	Production competitiveness
Year	Russia		Italy		Lebanon		Greece	
2002	0.878	0.025	1.301	0.072	0.459	0.115	0.872	0.138
2003	0.801	0.027	1.193	0.084	0.267	0.132	0.813	0.157
2004	1.012	0.032	1.319	0.086	0.254	0.141	0.726625	0.171
First period Average	0.897	0.028	1.271	0.081	0.326	0.130	0.804	0.155
2016	0.591	0.040	1.545	0.157	0.734	0.245	0.696	0.305
2017	0.629	0.045	1.272	0.169	0.742	0.252	0.781	0.325
2018	0.584	0.044	1.440	0.163	0.490	0.241	0.585	0.308
Second period average	0.602	0.043	1.419	1.163	0.655	0.246	0.687	0.313

Source: Own calculation using raw data from ITC, FAO data

6. Conclusion and recommendations

1. Potato production increasing with growth rate 5.6%.
2. Egypt ranks fourteen in production and fifth in exporting at global level.
3. The Ranking of Egypt seventh during (2002-2004), while it ranks six during (2016-2018)in terms of world Potato export, , which means Egypt, is expanding in potato exports according to global level.According Market share, In Russia market Egypt ranks first in the second period after it was ranked third in the first period, fourth in Italy market while it ranks first in Greece and Lebanon markets in both two period.
4. Egypt fell in the second period to sixth place after it was on fifth rank in the export strength indicator while it ranks first in the second period after it was in fifth rank according to dependency on export indicator.
5. Egypt has price competitiveness in Russia and Greece markets.

Research recommendation:

Appling potato value chain system by analyzing and evaluating the activities and procedures for each steps in the stages of potato production. Separate the useful elements and removing the obstacles to reducing production losses and hinder the leadership of the market with each step during each stage from pre-production stage to reach consumer through enhancing Enabling environment, (Rules and regulations, Laws and standards, Social & environmental standards) and support providers. Make a strong coordination in both way vertical& horizontal. Putting a plan to increase the Capacity building for all actors along value chain to raise the efficiency in Potatoes production sector (adding value to the product at the lowest possible cost) to create a competitive advantage and achieve profit margins.

Abstract

The main objective of this research is to find out the status of Egyptian potato exports and measuring its competitiveness in the main competing countries to international markets besides identify the Prevailing conditions in these markets, especially competitors status and price levels, as well as showing the main problems facing exportation and suggesting polices to enhancing it. The result of this research shows that during period (2002-2018), the potato production increasing with growth rate 5.6%. The Ranking of Egypt is seventh during first period and sixth during second period in terms of world Potato export, which means Egypt is expanding in potato exports according to global level. (Russia — Italy — Lebanon — Greece) are the main countries importing Egyptian potato during two periods. Egypt ranks first in Greece and Lebanon markets according to the market share indicator during two periods and its ranks fourth in Italy during two periods as well. While in the Russian market, Egypt has advanced to the first rank in the second period after it has ranked third in the first period. In the exports' strength indicator, Egypt ranked fifth in the first period, while it ranks sixth in the second period. The dependence on exports' indicator shows that, Egypt has ranked fifth in the first period, while it ranks first in the second period. Egypt has ranked second in both two periods but the value has decreased in the second period according RCA indicators. Price competitiveness shows that Egypt has competitiveness in Russia, Greece and Lebanon markets, In Italy Market; the index indicates an increasing in the Egyptian potato 'export price, compared to the countries competing among this market in two periods especially in the second period. Egypt has production Competitiveness, in Greece, Lebanon, Italy and Russia market in the first period and it is increasing in the second period. Finally, the amount of potato loss increasing due to lack of operating and structural system so we must try to over-come by putting policies to enhancing its export rate because we have a high opportunity in this crop.

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Table (Annex .1)

Year	production (1000/ton)	Exports (1000/ton)			% Export from total production (1000/ton)	Consumption (1000/ton)	Loss (1000/ton)	% loss from total production
		Q 1000/ton)(	P (dollar/ton)	V (Million/ton				
2002	1985	229	186	42.6	11.6	1361	179	9.02
2003	2039	296	148	44.0	14.5	1348	181	8.88
2004	2547	381	176	67.1	15.0	1572	219	9.6
2005	3167	392	198	77.5	12.4	2045	285	9
2006	2313	367	178	65.2	15.9	1439	201	8.69
2007	2760	390	277	107.9	14.1	1751	245	8.88
2008	3567	378	431	163.1	10.6	2356	330	9.25
2009	3659	215	676	145.4	5.9	2515	352	9.62
2010	3634	300	440	131.9	8.3	2389	576	15.82
2011	4388	637	393	250.7	14.5	2234	619	14.27
2012	4758	263	484	127.4	5.5	2515	830	17.44
2013	4265	428	481	205.9	10.0	2227	886	20.7
2014	4611	685	477	326.8	14.8	2237	884	19.17
2015	4955	601	388	232.9	12.1	2594	1004	20.26
2016	4113	473	342	162.0	11.5	2203	856	20.81
2017	4841	671	406	272.0	13.9	2363	922	19
2018	4841	502	410	206	10.4	2390	930	19.2
average	3673.118	385	358	155	10.5	2090.529	558.7647	14.0

Source: Ministry of agriculture, ITC

الملخص :

الهدف الرئيسي من البحث هو معرفة حالة صادرات البطاطس المصرية وقياس قدرتها التنافسية في الدول المنافسة الرئيسية للأسواق الدولية إلى جانب تحديد الظروف السائدة في هذه الأسواق ، وخاصة حالة المنافسين ومستويات الأسعار ، وكذلك بيان أهم المشكلات التي تواجه التصدير واقتراح السياسات لتحسينها. أظهرت نتائج البحث أنه خلال الفترة (٢٠٠٢-٢٠١٨) ازداد صادرات البطاطس بمعدل نمو ٥,٦٪. مصر في المرتبة السابعة خلال الفترة الأولى والسادسة خلال الفترة الثانية من حيث الصادرات العالمية من البطاطس ، مما يعني أن مصر تتوسع في صادرات البطاطس وفقًا للمستوى العالمي. (روسيا – إيطاليا – لبنان – اليونان) هى الدول الرئيسية التى تستورد البطاطس المصرية خلال فترتي الدراسة . تحتل مصر المرتبة الأولى في أسواق اليونان ولبنان وفقًا لمؤشر الحصة السوقية خلال الفترتين ، وتحتل المرتبة الرابعة في إيطاليا خلال الفترتين أيضًا. بينما في السوق الروسي ، تقدمت مصر إلى المرتبة الأولى في الفترة الثانية بعد أن احتلت المرتبة الثالثة في الفترة الأولى. وفي مؤشر قوة الصادرات ، احتلت مصر المرتبة الخامسة في الفترة الأولى ، بينما احتلت المرتبة السادسة في الفترة الثانية. ويوضح الاعتماد على الصادرات أن مصر احتلت المرتبة الخامسة في الفترة الأولى ، بينما احتلت المرتبة الأولى في الفترة الثانية. احتلت مصر المرتبة الثانية في كلتا الفترتين ولكن القيمة انخفضت في الفترة الثانية وفقًا لمؤشر النسبة الظاهرية. تظهر تنافسية الأسعار أن مصر لديها قدرة تنافسية في أسواق روسيا واليونان ولبنان ، في سوق إيطاليا ؛ يشير المؤشر إلى ارتفاع سعر تصدير البطاطس المصرية مقارنة بالدول المتنافسة في هذا السوق فى الفترتين خاصة في الفترة الثانية. تتمتع مصر بقدرة تنافسية في الإنتاج في أسواق اليونان ولبنان وإيطاليا وروسيا في الفترة الأولى وهي في تزايد في الفترة الثانية. وأخيرًا ، تزداد كمية فقدان البطاطس بسبب نقص نظام التشغيل والنظام الهيكلي ، لذا يجب أن نحاول التغلب عليها من خلال وضع سياسات لتحسين معدل تصديرها لأن لدينا فرصة كبيرة لهذا المحصول.