

Economic Analysis of the Current Situation for the Production, Export and the Competitiveness of Egyptian Oranges in Global Markets

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Abstract: Egypt's foreign trade characterized continuing increase in agricultural imports compared with agricultural exports, and agricultural exports represent a significant proportion of the total Egyptian exports, it is one of the main sources of foreign currency needed to the economic development process in Egypt, where the value of agricultural exports reached about 1356.9 million dollars, representing approximately 11.77% of total exports, while the value of agricultural imports reached about 4241.42 million dollars, representing approximately 15.57% of the total Egyptian imports, and thus the deficit in Egyptian agricultural trade balance about 2882.52 million dollars, and by coverage accounted for about 32% of total agricultural exports to agricultural imports to the average period (2001-2009) and to cover part of this deficit must maximize the export return of the most important agricultural exports, particularly horticultural crops, and especially orange crop. Total average production of oranges reached about 1555.41 thousand tons represents about 2.41% of the amount of world production of oranges to the average period (2001-2009), and achieved the highest amount of production in 2009, where the volume of production is about 21826 million tons, representing about 3.2% of the amount of global production, while the lowest amount of production in 2001, the volume of production is about 936 thousand tons, representing about 1.55% of the amount of global production, while the average amount of its exports reached about 312.43 thousand tons, representing approximately 20.1% of the Egyptian total production, and about 4.2% of the amount of global exports of orange, and the Egyptian orange average value of exports reached about 144.77 million dollars, representing about 10.65% of Egyptian agricultural exports average value, and about 2.3% of the total value of global exports of oranges to the same period, and achieved the highest value of Egyptian oranges exports in 2009, the value of orange exports about 488.44 million dollars, representing about 19.2% of Egypt agricultural exports value in 2009, and the lowest value of orange exports in 2002 were it reached about 26.54 million dollars, representing about 3.53% of the value of agricultural exports in Egypt. market share indicator for the amount of Egyptian exports of oranges to the main importing countries, Is one of the competitive Indicators and its height is one of the main goals to increase of foreign sales for any State, and its a height reflect the competitive position of any State Table (5) shows market share of orange to the most important importing countries during the period (2005-2009), where Ukraine market occupies the largest share, that the chance of exporting Egyptian orange has about 52.77%, means that the Egyptian orange has the opportunity to occupy 52.77% of the market of Ukraine, then the Saudi rate of 31.56%, followed by, Oman, United Arab Emirates, Russia, England, the Netherlands, respectively at a rate of 21.37%, 20.17%, 16.89%, 9.40%, 4.48%, respectively. The price competitive position of the Egyptian orange with the most competitive countries in the period from 2001-2009. this indicator is affected by a number of factors as the most important is its relative price, and by calculating the competitive position of the price of oranges in Egypt, the highest price achieved for Spanish Orange with an average of 684.48 U.S. dollars / ton and the ratio of price between it and the Egyptian orange price is around 1.48% this means that Egypt has the advantage of competitive price in the export of oranges, followed by the export price of Israel, Morocco, Italy, and Turkey where the ratio of price was about 1.27, 1.25, 1.06, 1.05% respectively during the period (2001-2009), average prices to these countries amounted to about 588.68, 578.69, 492, 488.41 dollars per ton.

Kew words: Economic Analysis, Export, Egyptian Oranges, Global Markets

INTRODUCTION

the foreign trade represents of great importance for any country ,especially developing countries ,including Egypt ,foreign trade played a pivotal role in the countries economies, The exports sector is one of essential sectors to finance programs and economic development plans, and the development of Egyptian agricultural exports come in the forefront of issues that attract the largest share of the state attention, as it is one of the most important challenges facing agricultural economic policies makers and Egypt's foreign trade characterized continuing increase in agricultural imports compared with agricultural exports ,and agricultural exports represent a significant proportion of the total Egyptian exports, it is one of the main sources of foreign currency needed to the economic development process in Egypt (Ahmed Mukhtar Qadri Bahloul, Dr, 2004) where the agricultural exports value reached about 1723.2 million dollars, representing about 9.6% of the total Egyptian exports of about 18000.6 million dollars as the average for the period (2005-2009). The total domestic production of Egyptian oranges about 1.958 million tons, representing about 2.94% of the amount of world production of oranges, while the average amount of its exports about 302.6 thousand tons, representing approximately 15.45% of the total Egyptian production, and the average value of Egyptian exports of oranges to 221.94 million, representing approximately 10.92% of the average value of agricultural exports for that period of about 1723.2 million dollars as average for the period (2005-2009)

The Study Problem:

The yield of Egyptian orange is one of the major export crops which Egyptian agricultural economic policy aimed, although the export of Egyptian orange has advantage of price competitive than other competition countries, according to the competitive price position indicator, but the amount of exports of oranges is currently only 20.1% of its production at price 463.37 dollars per ton, which indicates that the export of Egyptian orange faces fierce competition in global markets ,in addition to the lack of clarity the determinants of competitiveness in guiding the Egyptian orange exports.

The Study Objective:

The current situation study of production and export of the orange and determining the competitiveness of Egyptian exports of oranges in the markets of major importing countries of orange, and clarify the marketing opportunities in various foreign markets and the problems of export and the main solutions proposed to solve them, by using some indicators of competitiveness, to try to improve or increase the competitiveness of Egyptian exports of orange.

Data Sources and Research Method:

The study depended on statistical data published and unpublished from various quarters such as the Ministry of Agriculture, Food and Agriculture Organization, the Arab Organization for Agricultural Development, and the Central Agency for Public Mobilization and Statistics. (National Information Center).

The study also adopted the style of descriptive analysis to characterize the problem, in addition to the style of quantitative analysis by using some of the various measures such as averages and percentages, and also depended on some economic indicators to determine the competitive position of the Egyptian orange.

Such as the price competitive position, the market share indicator, the market penetration rate, the share of the commodity-importing countries under study from Egypt, and compare it with the competitive countries in every market.

Overview of Indicators Used in the Study:

First: the Market Share Indicator:

The market share one of the indicators competitive as the height represents one of the main goals of the process of expanding the size of foreign sales to any state and thus the rise in market share reflecting the rise in the competitive position of any country, and reflects the market share indicator on the percentage of a country's exports are of a particular commodity to a particular market to imports that market from different countries of the world that good (Ashraf Kamal Abbas Dr, 2000), and it calculated by the following equation:

$$MSH_{ji} = (X_{jci} / M_{cwi}) \times 100$$

where:

MSH_{ji}: market share of the state j of the commodity I.

X_{jci}: a country's exports j to country C of the commodity I

MCW_i: is a state's total imports C from the world of the commodity I

Second: the Share of the Importing Countries:

It is a good indicator to determine the most important foreign markets and whether demand for the commodity is a real or viewer, and to identify markets that have a priority in directing more of the commodity to export for it, the share of the importing countries estimated by calculating the ratio between the average quantity of imports of the importing country for the good of Egypt to the average total the amount of Egypt's exports of the same commodity

Thirdly: the Price Competitive Position:

Affected the competitive position of exports with a number of factors, the most important relative price, and the ability to meet the requirements of export and efficiency of marketing operations, relative price is the most important of the above factors to influence on the competitive position of the commodity in the global market, depending on the sensitivity of demand to changes in prices. And is estimated the competitive position of the price by finding the ratio of price between the competition state and Egypt in export this crop taken into account, and if the value of this indicator exceeds one this indicates that Egypt has a price advantage in the oranges export (Rania Barghash, 2008) as follows:

$$PA_j = PC / P_e.$$

where:

PA_j: the ratio between the price of competition state to Egypt price

PC: the price of competition state.

P_e: Egypt price.

Fourth: Market Penetration Ratio:

The rate of market penetration is the best criteria for measuring competitiveness widespread and can be defined as a ratio between the imports of a given commodity from another country (to be measuring the rate of penetration of the market) and consumption of virtual of that commodity (Muhy El -Ddin Albejaoui, Heba Yassin, 2007) it is measured by the following equation:

$$MPR_{jci} = M_{cij} / (Q_{ci} + M_{ci} - X_{ci})$$

where:

MPR_{jci}: the rate of market penetration of the state J of commodity I of the State C.

M_{cij}: a country's imports C of commodity I of the state J.

Q_{ci}: a production of the State C of commodity I.

M_{ci}: State's total imports of C of the commodity I.

X_{ci}: is a country's exports of C of the commodity I.

And take the value of this indicator large of one, The higher the resulting value of this equation in a particular market indicates that the market breadth and ease of entry and vice versa (Khadija Mohamed El-Aasaar Dr, 2001) thus the rate of market penetration shows how the existence of a real market of product or not.

The Results Discussion:

Evolution of Production and the Egyptian Exports of Orange:

Egypt's foreign trade characterized continuing increase in agricultural imports compared with agricultural exports, and agricultural exports represent a significant proportion of the total Egyptian exports, it is one of the main sources of foreign currency needed to the economic development process in Egypt, where the value of agricultural exports reached about 1356.9 million dollars, representing approximately 11.77% of total exports, while the value of agricultural imports reached about 4241.42 million dollars, representing approximately 15.57% of the total value of Egyptian imports, and thus the deficit in Egyptian agricultural trade balance about 2882.52 million dollars, and by coverage accounted for about 32% of total value of agricultural exports to agricultural imports to the average period (2001-2009) and to cover part of this deficit must maximize the export return of the most important agricultural exports, particularly horticultural crops, and especially orange crop.

total average production of oranges reached about 1555.41 thousand tons represents about 2.41% of the amount of world production of oranges to the average period (2001-2009), and achieved the highest amount of production in 2009, where the volume of production is about 2182.6 thousand tons, representing about 3.2% of the amount of global production, while the lowest amount of production in 2001, the volume of production

is about 936 thousand tons, representing about 1.55% of the amount of global production as it cleared in Table (1) , while the average amount of its exports reached about 312.43 thousand tons, representing approximately% 20.1 of the Egyptian total production, and about 4.2% of the amount of global exports of orange, and the Egyptian orange average value of exports reached about 144.77 million dollars, representing about 10.65% of Egyptian agricultural exports average value, and about 2.3% of the total value of global exports of oranges to the same period as it cleared in Table (1, 2), and achieved the highest value of Egyptian oranges exports in 2009, the value of orange exports about 488.44 million dollars, representing about19.2% of Egypt agricultural exports value in 2009, and the lowest value of orange exports in 2002 were it reached about 26.54 million dollars, representing about 3.53% of the value of agricultural exports in Egypt.

Table. 1: The relative importance of the Egyptian production of the global production of oranges during the period (2001-2009) (Quantity in thousand tons)

Year	the amount of Egypt's production	quantity of production in the world	% Egypt's production of the world
2001	936	60504	1.55
2002	1008	62320	1.62
2003	1154	61063	1.89
2004	1110	64260	1.73
2005	1295	66361	1.95
2006	2120.05	65568.74	3.23
2007	2054.63	65513.77	3.14
2008	2138.43	67695.8	3.16
2009	2182.61	68230.56	3.2
Average	1555.41	64612.98	2.41

Source: compiled and calculated from the data - the Central Agency for Public Mobilization and Statistics - National Center for Information

Table. 2: the relative importance of the Egyptian exports value of oranges during the period(2001-2009). (Quantity in thousand tons and the value in million U.S. \$)

Statement Year	oranges exports					
	total value of Egyptian exports	Agricultural exports Value	% Of the value of total exports	The amount of orange exports	oranges exports Value	% Of the agricultural exports value
2001	7118	751.4	10.56	257.86	50.62	6.74
2002	4673	751.4	16.08	126.73	26.54	3.53
2003	5890	869.8	14.77	166.77	39.18	4.5
2004	7747.7	1441.7	16.03	258.26	76.87	5.33
2005	10444.2	1059.5	10.14	217.25	76.23	7.2
2006	14274.4	1036.4	7.26	202.66	65.08	6.3
2007	16426.1	1432.4	10.18	271.28	98.38	6.9
2008	25737.2	2543.9	9.88	489.28	381.56	15
2009	23121.5	2543.9	11	821.81	488.44	19.2
Average	12825.8	1358.9	11.77	312.43	144.77	8.3

Source: compiled and calculated from the data - the Central Agency for Public Mobilization and Statistics - National Center for Information

The Relative Importance Of The Quantity And Value Of Egyptian Exports Of Oranges To The Main Importing Countries During The Period (2001 -2009):

cleared from Table (3) The quantity and value of the Egyptian orange exports to major importing countries during the period (2001-2009), where the table shows that the market is Saudi Arabia ranked first where the quantity imported, where even the average amount of imports about 67.9 thousand tons, representing approximately 21.73% of the average total orange exports for that period, valued at about 29.36 million U.S. dollars accounted for 20.3% of the total value for the same period at an average rate of about 432.4 U.S. dollars/ ton, followed by market Russia and Ukraine, England and the Netherlands an average amount of approximately 61.67, 33.06, 26.62 , 13.58 tons, representing about 19.74%, 10.58%, 8.52%, 4.35% of the total quantity exported at a value of about 27.94, 14.86,10.86, 6.56, million dollars, representing the proportion of 19.3,10.26,7.43,4.53% of the total value at an average price of approximately 453, 449.5, 404.2, 483.1 U.S. dollars / ton of the States respectively during the period (2001.2009) (Table 3), and notes from the table the price of Egyptian orange exports to the Dutch market at about 483.1 U.S. dollars tons, an increase estimated at about 4.3 on the average export price for the period mentioned, of about 463.4 U.S. dollars / ton, so the study suggests directing more of the quantities exported from the orange of the Dutch market.

Table. 3: The relative importance of the quantity and value of Egyptian exports of oranges to the main importing countries during the period (2001-2009)

State	Quantity (Thousand tons)	% of the Total	Value (million dollars)	% of The total	average export price (U.S. \$ / ton)
Saudi Arabia	67.9	21.73	29.36	20.28	432.4
Russian Federation	61.67	19.74	27.94	19.3	453
Ukraine	33.06	10.58	14.86	10.26	449.5
England	26.62	8.52	10.76	7.43	404.2
Netherlands	13.58	4.35	6.56	4.53	483.1
United Arab Emirates	12.76	4.08	5.47	3.78	428.7
Oman	6.27	2.01	2.94	2.03	468.5
Croatia	3.34	1.07	1.14	0.79	341.7
Other	87.23	27.9	45.74	31.59	-----
Total	312.4	100	144.8	100	463.4

Source: compiled and calculated from the data - the Central Agency for Public Mobilization and Statistics - National Center for Information

Economic Indicators To Determine The Competitive Position Of The Egyptian Orange:

First: The Share Indicator Of The Most Important Importer Of Egyptian Orange:

This indicator is used to identify the most important overseas markets, importing the crop and to identify markets that have the priority in directing more of the commodity to them, and calculates the indicator as the table (4) it is clear that the share of the Saudi market is ranked first by about 67. 9 Thousand tons, representing 21.7% of the total amount exports to all countries, amounting to about 312. 43 Thousand tones, followed by the market of the Russian Federation about 61. 7 Thousand tons, representing about 19.7%, then Ukraine market, England, about 33.1, 26.62 Thousand tons, representing about 10.6%, 8.5%, respectively, during the period (2001-2009).

Table. 4: share the most important importer of Egyptian orange during the period (2001-2009).

State	average quantity of imports from Egypt	% share of the importing countries	Respectively
Saudi Arabia	67.9	21.7	1
Russian Federation	61.7	19.7	2
Ukraine	33.1	10.6	3
England	26.6	8.5	4
Average amount of Egypt's exports	312.4	-----	---

Source: collected and calculated data from the Food and Agriculture Organization of the Internet database(FAOSTAT)

Second: Market Share Indicator For The Amount Of Egyptian Exports Of Oranges To The Main Importing Countries:

Is one of the competitive Indicators and its height is one of the main goals to increase of foreign sales of any State, and a height reflects the competitive position of any State, The table (5) market share of orange to the most important importing countries during the period (2005-2009), where Ukraine market occupies the largest share , that the chance of exporting Egyptian orange has about 52.77% , means that the Egyptian orange has the opportunity to occupy 52.77% of the market of Ukraine, then the Saudi rate of 31.56%, followed by, Oman, United Arab Emirates, Russia, England, the Netherlands, respectively at a rate of 21.37%, 20.17 % , 16.89%, 9.40%, 4.48%, respectively.

Thirdly: The Price Competitive Position Indicator Of The Egyptian Orange:

This indicator is affected by a number of factors as the most important is its relative price, and by calculating the competitive position of the price of oranges in Egypt as in the table (6) it is clear that the highest price achieved for Spanish Orange with an average of 684.48 U.S. dollars / ton and the ratio of price between it and the Egyptian orange price is around 1.48% this means that Egypt has the advantage of competitive price in the export of oranges, followed by the export price of Israel, Morocco, Italy, and Turkey where the ratio of price was about 1.27, 1.25, 1.06, 1.05% respectively during the period (2001-2009) , average prices to these countries amounted to about 588.68, 578.69 , 492, 488.41 dollars per ton.

Table. 5: The market share indicator of Egyptian exports of oranges to the main importing countries during the period (2001-2009)(Quantity: thousand tons)

State	average quantity of imports from Egypt	average total quantity of imports of oranges	the market share	arrangement
Ukraine	33.1	62.72	52.77	1
Saudi Arabia	67.9	215.1	31.56	2
Oman	6.27	29.33	21.38	3
United Arab Emirates	12.76	63.24	20.18	4
Russian Federation	61.7	365.2	16.89	5
England	26.6	282.8	9.41	6
Netherlands	13.58	302.6	4.49	7

Source: collected and calculated data from the Food and Agriculture Organization of the Internet data base (FAOSTAT)

Table. 6: price competitive position indicator of the Egyptian orange With the most competitive countries in the period of 2001-2009

State	price competitive position
Spanish oranges Price / Egyptian orange Price	1.48
Italian oranges Price / Egyptian orange Price	1.27
Moroccan oranges Price / Egyptian orange Price	1.25
Turkish oranges Price / Egyptian orange Price	1.06
Israelite oranges Price / Egyptian orange Price	1.05

Source: collected and calculated data from the Food and Agriculture Organization of the Internet database (FAOSTAT)

Fourth: the Rate Of Markets Penetration Indicator:

Penetration of markets for Egyptian exports the oranges to the main importing countries during its period (2001-2009).

Its Clear that the higher the value of the rate of market penetration as this indicates the width of the market and the ease of penetration and entry as shown in Table (7), the possibility to increase exports of Egyptian orange ,in each of the markets of Ukraine, Saudi Arabia, United Arab Emirates, Oman, with high value of the rate of market penetration of them to reach about 52.985, 31.998, 24.296, 21.847%, respectively, while less opportunities for increasing exports of Egyptian oranges in the English and Dutch markets with an estimated rate of market penetration of about 10.99, 10.06%, respectively, and lower ratio indicates how difficult the entry or expansion in these markets.

Table. 7: the rate of market penetration indicator of the Egyptian exports of oranges to the main importing countries during the period (2001-2009)(the quantity in thousand tons)

State	Average quantity of imports from Egypt	Average total quantity of imports of oranges	amount of production	Average amount of exports	rate of market penetration
Saudi Arabia	67.9	215.1	0	2.92	32
Russian Federation	61.7	365.2	0.32	5.42	17.13
Ukraine	33.1	62.72	0	0.25	52.99
England	26.6	282.8	0	18.42	10.06
Netherlands	13.58	302.6	0	179.2	11
United Arab Emirates	12.76	63.24	0	10.72	24.3
Oman	6.27	29.33	0	0.63	21.85

Source: collected and calculated data from the Food and Agriculture Organization of the Internet database(FAOSTAT)

The Relative Importance Of Exports , Production And The Export Price Of Oranges In Egypt And The Rival Countries During The Period (2001-2009):

As is shown in table (8), where is the mirror that reflects the situation of productive and export of oranges in rival exporting countries, as evidenced by the data table that Spain export a large proportion of its production amounted to about 57.5% and at a higher price than the price of Egyptian orange, with an average export price is about 684 0.48 dollars per ton, this led to the rise in the export value of Spanish oranges and also due to Spain have their existence as a member of the European Union customs exemptions, protection, and the quota shares of open and high prices, these advantages not enjoyed by the Egyptian exports of orange, but faced with the arbitrary conditions harsh where standards and quality by the European Union, and also the same reasons as for Italy, which is also a member of the European Union, in return, we find that Egypt exported only 20.1% of its production and price of 463.37 dollars per ton, the price of lean with a low volume

of orange exports led to a decline in the export value of Egyptian oranges, despite the distinct advantage of a price higher than the other countries the competition. and other countries was ordering them as follows in terms of export ratio Morocco, Israel, Turkey increased by 37.11%, 23.93%, 15.38%, respectively, which indicates that the Egyptian exports of orange faces stiff competition and tough to be Response to study foreign markets well and cultivation of varieties of high quality and productivity and the desired outside of the consumer and the time to export.

Table. 8: The relative importance of exports and production and the export price of oranges in Egypt and the rival countries during the period (2001-2009) (Quantity in thousand tons, value in thousand dollars)

State	Variable	Average
Spain	the production	2341.2
	exports amount	1346.5
	%	57.5
	exports value	918328
	export price	684.48
Morocco	the production	672.34
	exports amount	249.5
	%	37.11
	exports value	144382
	export price	578.69
Israel	the production	172.65
	exports amount	41.314
	%	23.93
	exports value	243.14
	export price	588.68
Egypt	the production	1555.41
	exports amount	312.43
	%	20.1
	exports value	1444.77
	export price	463.37
Turkey	The production	1132.31
	exports amount	174.1
	%	15.38
	exports value	85028.8
	export price	488.41
Italy	the production	1764.5
	exports amount	110.437
	%	6.25
	exports value	54360.4
	export price	492

Source: collected and calculated data from the Food and Agriculture Organization of the Internet database(FAOSTAT)

The Main Impediments To Orange Exports:

- 1 - lack of sorting stations, and the mobilization of orange.
- 2 - Non-availability of orange seedlings of new varieties with higher grain prices make small-scale farmers are reluctant to plant it and went on to plant varieties are not required externally on a large scale.
- 3 - Not the validity of the Egyptian exports in the time when the global demand for oranges, starting from mid-October to January and at high prices, due to lack of coloration full of fruits from green to yellow, and the possibilities for coloring fruits in Egypt is still primitive and thus refusal to foreign markets.
- 4 - Despite the enjoyment of Egyptian orange exports price competitive advantage, but it faces fierce competition in foreign markets for exporting countries in the world as a result of omission of the tastes of consumers in global markets and choose the right time for export.
- 5 - The export process depended on the efforts of individual decisions, which might be characterized as random in some cases as a result of the absence of clear policies and updated information to exporters.\
- 6 - Exporters do some casual work deals in the export of items not conforming to specifications of export, which affects the reputation of the Egyptian product.
- 7 - Non-availability of marketing information and export of accurate and sufficient for both producers and exporters of Egyptian orange for foreign markets and supply and demand, prices and the best periods for export and the requirements of overseas markets, quality and degree of maturity, size and color of fruits and tastes of foreign consumers, and the weakness of advertising and promotion of the Egyptian orange, and the intense competition between Egyptian exporters in foreign markets, prompting some of them to sell at low prices.

- 8 - Has been accepted thirteen state to enter into the European Union, of which eleven importer of Egyptian oranges were not included in the quantities the quantities specified in the European partnership agreement, and it is expected that Croatia joins the European Union is a net importer of Egyptian orange.(Amal Yusuf Ismail, 2004)

Proposed Solutions To Face The Orange Export Impediments:

- 1 - Must be early in the production of Egyptian orange meet the needs of the European market during the months of November , December and January, a period that the lack of production of the European Union, especially Spain, with work to open new markets for Egyptian orange, as well as work on the stability and to Eastern Bloc countries imports and expanding markets in the COMESA of Orange to those markets and conformity to specifications with the achievement of price competition to produce a price competitive countries. In addition to work on removing all the obstacles facing export process, particularly to export Egyptian orange.
- 2 - The expansion and application of the concept of production for export and not domestic consumption surplus, with a commitment to the standard specifications for each bloc of economic blocs
- 3 - A claim the European Union during the negotiation that is with them every three years, increase the quantities exported, which enjoy full exemption from customs duties and quotas allowed to be exported duty reduction. With the work to prolong the periods so as to increase exports of oranges, especially with the entry of new production areas, and work on early agriculture and the cultivation of early maturing varieties in accordance with the wishes of European consumers and to meet international standards.
- 4 - Export operations exempt from all fees, and hallmarks, and administrative expenses imposed by various government agencies.
- 5 - Direct investments for the establishment of a strong base of infrastructure for export as well as training of human resources capable of dealing with the requirements of export production.
- 6 - The establishment of institutions capable of conducting agricultural exports.

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