

Egyptian Food Observatory

Food Monitoring and Evaluation System

Quarterly Bulletin, Issue 11, January - March 2013





Publication Objectives

This food security monitoring publication, which is jointly published by the Egyptian Cabinet's Information and Decision Support Center (IDSC) and WFP, systematically tracks trends in the production, consumption and prices of key food commodities and their impact on the food security situation of the most vulnerable households in urban and rural areas across Egypt. It monitors and identifies emerging local and global trends that can affect food security¹ in Egypt. Aimed at policy makers and development partners, this publication seeks to provide updates and analysis of Egypt's food security situation to assist its audience in policy decision-making.

Initially released monthly, the publication is now being produced quarterly to better highlight longer-term changes in the food security situation of the country and provide more comprehensive analysis to decision makers.

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¹ "Food security exists when all people, at all times, have physical, social and economic access to sufficient, safe and nutritious food to meet their dietary needs and food preferences for an active and healthy life", FAO (1996), *Declaration of the World Food Summit*. The food security encompasses food availability, access, utilization and stability.



Highlights

- ★ About **37.1% of vulnerable households¹ surveyed** reported being exposed to some form of shock which affected their financial situation over the last year, where it went up from 34.7% in Quarter 4 (Q4) 2012. About **44.1% of these households identified significant food price increases as the major challenge**, up from one third in Q4. (Page 8)
- ★ The **monthly price burden** which indicates **price changes in the food basket²**, saw an increase of 1.8% between December 2012 and March 2013. This increase likely contributes to the **increased proportion of households reporting insufficient income to meet monthly needs (88.9% in Q1 2013 against 83.1% in Q4 2012)**. (Page 4)
- ★ In March 2013 **inflation**, as measured by the Consumer Price Index, **increased by 8.2% year-on-year and 0.8% month-on-month**, with the **price of food and non-alcoholic beverages recording the highest increase among all groups in the index at 9.5% year-on-year and 1.6% month-on-month**. Vegetables as well as bread and cereals saw the highest price rises relative to February 2013, increasing by 3.4% and 2.3% respectively. The latter was driven by a 5.5% increase in the price of wheat flour and 4.3% increase in the price of rice³. **With 66.1% of the surveyed households' expenditure going to food**, this makes **them particularly vulnerable to higher food prices** and highlights that food security remains an issue of economic access. (Page 4)
- ★ **Of households surveyed, 93.7% reported static incomes**, with 45.2% reporting additional income to supplement their main job. Given the pressing economic needs, unemployment among these household heads was low (2.7%). against a national rate of 13% in Q4 2012⁴, as they work multiple jobs, largely as casual labor. (Pages 7 and 8)
- ★ Households whose income was insufficient to meet their monthly needs used **coping strategies including consuming cheaper food items, which in Q1 2013 represented 32.2% of coping strategies, up from 30.7% in Q4 2012**, borrowing food or money (27.8%), buying on credit (18.8%) and reducing food intake (14%). (Page 9)
- ★ **Some 23.3% of vulnerable¹ households surveyed do not hold a ration card**. The majority (95.7%) of those who do, utilized them to purchase their ration allocations. Lack of commodities at ration grocers was the main reason cited in preventing households from purchasing rations, followed by poor quality of commodities. (Page 10)
- ★ **Vulnerable households' food consumption patterns continue to show poor dietary diversity and an over-reliance on cereals and bread** (consumed 7 days a week by 100% of households surveyed), with **subsidized bread consumed the most frequently** (6.4 days by 88.8% of households). **Oil, butter and sugar were also consumed daily**, legumes 6.1 days and dairy products 4.4 days a week, while **vegetables and fruit were only consumed 3.5 and 1.3 days respectively**. **Meat, poultry and fish were consumed less than once a week**, with eggs forming the main source of animal protein (2.4 days). **High and fluctuating food prices have compounded poorer households' over-reliance on cheaper calorie-dense food** with negative nutritional implications⁵. (Page 11)

Special Report: Food Security and Wheat Policy in Egypt

- ★ Egypt is the world's largest wheat importer. It imports 9-10 MT annually on average (around 50-60% of the country's needs) over the last 5 years, through the General Agency of Supply Commodities (GASC).
- ★ Given a 10% loss in the value of the Egyptian pound since December 2012, the downgrade of Egyptian banks by international credit agencies twice over past year, and the receding foreign reserves which currently stand at USD 13.4 billion, a figure which is expected to cover less than 3 months of imports, all these elements combined pose a challenge to the imported wheat supply. Traditionally wheat stocks of some six months-worth of supply have been maintained. However, the current macroeconomic challenges have seen a significant drop in the wheat inventory.
- ★ According to government estimates this year's domestic harvest will reach 9.5 MT and of that an estimated 4.5 MT will be available for government procurement. The Minister of Supply has sought to leverage Egypt's position as the world's top wheat importer to ease imports payment arrangements.
- ★ The special report highlights recommendations, including the role of GASC.

¹ Currently households surveyed are selected on the basis of poverty as defined by the CAPMAS Household Income, Expenditure and Consumption Survey (HIECS). Selection criteria are being adjusted to focus on vulnerability to food insecurity.

² See Annex (p. 14) for full list of items in the food basket.

³ CAPMAS (March 2013), Consumer Price Index, http://capmas.gov.eg/pepo/378_e.pdf

⁴ CAPMAS (April 2013), Unemployment data

<http://capmas.gov.eg/pepo/Labor%20Force%204th%20Quarter2012%20randa%20new.pdf>

⁵ World Bank (March 2013), Food Price Watch, Issue 13.

<http://siteresources.worldbank.org/EXTPOVERTY/Resources/336991-1311966520397/Food-Price-Watch-March-2013.pdf>



1. Trends and Impact of Food Commodity Price Changes

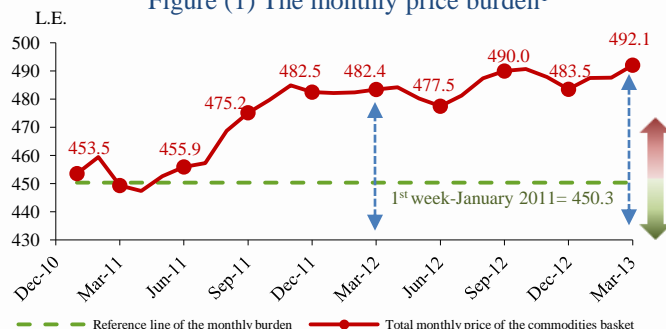
1.1 Food Basket Price Changes

- ★ The **monthly price burden** (Fig. 1), which indicates price changes in the food basket¹, saw **an increase in March 2013 by 1.8%** compared to December 2012.
- ★ **Between 1st week of January 2011 and March 2013 prices increased by 9.3%**, resulting in a nominal price increase of L.E. 41.8 per food basket. This upward trend was evident in Lower Egypt and Frontier governorates, against a slight decrease in urban governorates. (Fig. 2)
- ★ Such price increases likely contribute to the **proportion of households reporting insufficient income to meet monthly needs** (88.9% in Quarter 1 “Q1” of 2013 against 83.1% in Q4 of 2012 – p.9). However, this proportion remains worryingly high and is in line with vulnerable households reporting spending about 66.1% of their income on food (against 63.3% in Q4 2012 – p.8), compared to the national average of 40.6%².
- ★ The Consumer Protection Agency (CPA) is looking to publish commodity prices, particularly food and global food prices and their trends to better inform consumers of price changes³.

1.2 Inflation Rates

- ★ Inflation, as measured by the Consumer Price Index, **increased in March 2013 by 8.2% year-on-year and 0.8% month-on-month**. The price of food and non-alcoholic beverages recorded the **highest increase among all groups in the index at 9.5% year-on-year and 1.6% month-on-month**⁴. (Fig. 3)
- ★ Vegetables as well as bread and cereals saw the highest price rises in March 2013 compared to February 2013, increasing by 3.4% and 2.3% respectively. The latter was driven by a 5.5% increase in the price of wheat flour and 4.3% increase in rice⁴.
- ★ **With 66.1% of surveyed households’ expenditure going to food** (page 8), this makes them **particularly vulnerable to higher food prices**, highlighting that food security remains an issue of economic access.

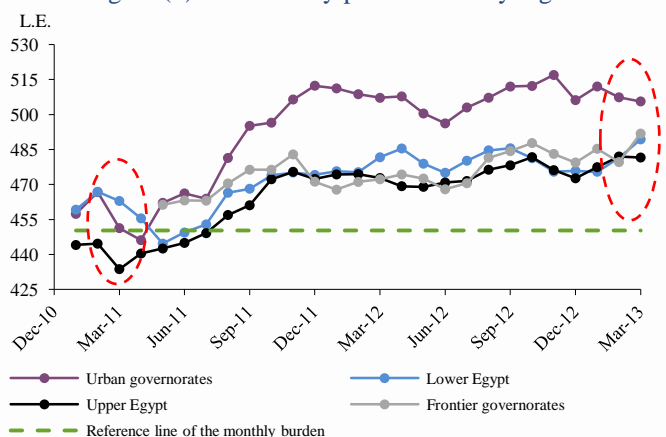
Figure (1) The monthly price burden¹



¹ Reference line of the monthly burden has been updated upon the completeness of prices data in different governorates.

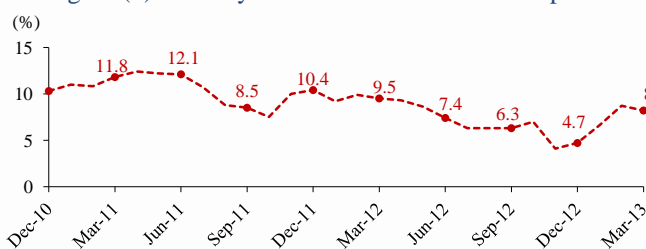
Source: Field Monitoring Network, Cabinet-Information and Decision Support Center.

Figure (2) The monthly price burden by region



Source: Field Monitoring Network, Cabinet-Information and Decision Support Center.

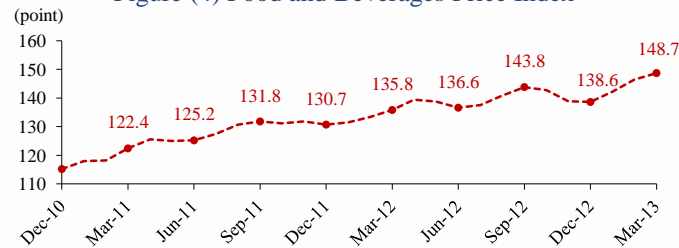
Figure (3) Monthly inflation rate for consumer prices¹



¹Reference month (January 2010=100%).

Source: Central Agency for Public Mobilization and Statistics, CAPMAS.

Figure (4) Food and Beverages Price Index¹



¹Reference month (January 2010=100 points).

Source: Central Agency for Public Mobilization and Statistics, CAPMAS.

¹The food basket includes 27 commodities presented in the Annex (page 14).

²CAPMAS (2011) Household Income Expenditure and Consumption Survey.

³Al-Shrouk Newspaper 23 March 2013.

⁴CAPMAS (March 2013), Consumer Price Index, http://capmas.gov.eg/pepo/378_e.pdf



1.3 Regional Variations in Commodity Prices

- ★ As noted in Table 1 below, most commodities recorded a price increase during Q1 2013.
- ★ Onions (ahead of harvesting in April¹) and eggplant prices have significantly increased in all regions in Q1 2013.
- ★ Contrary to the last quarter where tomato prices saw significant decrease, in Q1 2013 witnessed a significant increase in all regions, especially in Lower Egypt ahead of harvesting in April¹.
- ★ Potatoes prices recorded a significant price decrease across all regions in Q1 2013, following March harvesting.
- ★ Beef prices witnessed a notable decrease in Upper Egypt and Frontier governorates, with increases in domestic production².

Table (1) March 2013 prices and the rate of change compared to December 2012 prices of some food commodities L.E. Kg (%)

Goods	Urban	Lower	Upper	Frontier
Beef	61.5 (2.1) ↑	60.1 (0.7) ↑	53.4 (- 0.7) ↓	59.2 (- 1.3) ↓
Poultry ¹	20.6 (19.9) ↑	19.2 (19.5) ↑	19.9 (14.8) ↑	19.1 (17.9) ↑
Tilapia fish	13.4 (9.9) ↑	13.0 (17.0) ↑	16.1 (- 7.2) ↓	15.3 (3.5) ↑
Eggplant	4.2 (38.9) ↑	3.1 (72.3) ↑	2.7 (82.0) ↑	3.4 (47.5) ↑
Potatoes	3.2 (- 8.3) ↓	2.9 (- 13.4) ↓	2.9 (- 2.7) ↓	3.2 (- 3.6) ↓
Onions	4.2 (63.5) ↑	4.0 (95.5) ↑	3.6 (63.4) ↑	3.8 (42.4) ↑
Tomatoes	1.7 (5.2) ↑	1.8 (44.4) ↑	1.5 (26.7) ↑	2.0 (8.7) ↑
Local beans ²	8.2 (- 0.2) ↓	7.6 (0.1) ↑	7.7 (2.0) ↑	7.2 (- 11.2) ↓
Yellow lentils ³	9.9 (- 1.5) ↓	9.9 (4.1) ↑	8.7 (5.8) ↑	8.4 (0.9) ↑
Flour ³	4.5 (- 1.2) ↓	4.8 (1.8) ↑	4.3 (9.9) ↑	4.3 (1.9) ↑
Rice ⁴	4.4 (- 0.3) ↓	4.2 (0.2) ↑	4.5 (2.9) ↑	4.4 (- 2.8) ↓
Macaroni ⁵	5.5 (2.7) ↑	4.9 (6.1) ↑	5.0 (12.7) ↑	5.1 (5.9) ↑
Sugar ⁶	5.6 (- 1.6) ↓	5.5 (- 3.4) ↓	5.4 (0.3) ↑	5.3 (- 0.2) ↓
Corn oil ⁷	14.5 (- 0.7) ↓	13.4 (- 0.6) ↓	14.1 (2.9) ↑	13.7 (- 4.8) ↓

¹ Poultry prices are defined as average local, and white live and frozen poultry.

² Unpacked bean ³ Packed ⁴ Include packed and bulk

⁵ Ordinary Packed ⁶ Packed by private sector ⁷ L.E./ liter

Source: Field Monitoring Network, Cabinet-Information and Decision Support Center.

¹FAO Crop Calendar <http://www.fao.org/agriculture/seed/cropcalendar/searchbycountry.do>

²USDA (2012), Livestock and Poultry World Trade Markets,

http://www.fas.usda.gov/psdonline/circulars/livestock_poultry.pdf

- ★ Urban and rural commodity prices have been compared and monitored in March 2013 in Menofya, Bani Swaif, Assuit, Al-Behera, Al-Qalyoubia, Matroh, Qena and Red Sea Governorates (table 2).
- ★ It is worth noting that 67.1% of the urban prices were higher than rural prices; whereas only 8.1% of rural prices compared were identical with urban prices.

Table (2) Comparison of food commodities prices between urban and rural areas

Goods	Comparison of the price per Kg by amount and as %*
Local beans	<ul style="list-style-type: none"> ○ Al-Behera and Menofya : rural < urban by L.E. 2.5 and 2.3, respectively (35.7% and 28.1%, respectively). ○ Bani Swaif and Matroh: rural > urban by L.E. 2.0 (28.6%)
Yellow lentils	<ul style="list-style-type: none"> ○ Matroh: rural > urban by L.E. 2.0 (28.6%). ○ Qena: rural < urban by L.E. 2.0 (22.2%).
Black lentils	<ul style="list-style-type: none"> ○ Bani Swaif: rural < urban by L.E. 4.8 (36.5%). ○ Al-Behera: rural > urban by L.E. 2.0 (26.7%).
Garlic	<ul style="list-style-type: none"> ○ Matroh, Al-Behera, Assuit, and Qena: rural < urban by L.E. 5.8, 3.1, 2.1 and 2.0, respectively (71.9%, 42.0% 35.7% and 33.3%, respectively). ○ Bani Swaif: rural > urban by L.E. 1.2 (63.6%).
Wheat Flour	<ul style="list-style-type: none"> ○ Menofya: rural < urban by L.E. 2.0 (33.3%).
Corn Oil	<ul style="list-style-type: none"> ○ Al-Qalyoubia: rural > urban by L.E. 2.9 (26.3%).
Natural Ghee	<ul style="list-style-type: none"> ○ Al-Qalyoubia and Bani Swaif : rural > urban by L.E. 17.0, and 14.3 respectively (61.8% and 46.3%, respectively).
Catfish	<ul style="list-style-type: none"> ○ Menofya and Qena: rural > urban by L.E. 4.5 (39.1% and 37.5%, respectively).
Mugil Cephalus	<ul style="list-style-type: none"> ○ Menofya: rural < urban by L.E. 13.3 (40.0%). ○ Al-Qalyoubia: rural > urban by L.E. 9.0 (45.0%).
Beef	<ul style="list-style-type: none"> ○ Menofya: rural > urban by L.E. 13.5 (34.6%). ○ Al-Qalyoubia: rural < urban by L.E. 11.0 (19.6%).
Veal	<ul style="list-style-type: none"> ○ Al-Behera and Al-Qalyoubia: rural < urban by L.E. 13.3 and 12.5 (22.9% and 23.8%, respectively).
Lamb	<ul style="list-style-type: none"> ○ Al-Behera: rural > urban by L.E. 12.5 (22.7%). ○ Assuit: rural < urban by L.E. 9.0 (13.8%).

*Percentages were calculated by dividing the difference between urban and rural prices by the urban price.

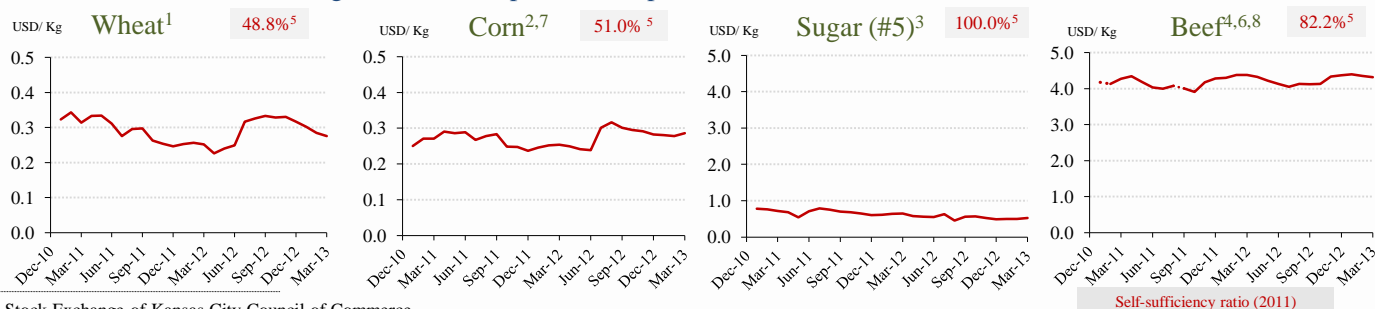


1.4 Food Commodity Global Prices Trends

1.4.1 Global prices of key food commodities

✧ In the first half of the 2012/13 fiscal year Egypt's **balance of payments (BoP) deficit fell to USD 551.5 million from USD 8 billion (bn)** during the first half of 2011/12. The change was driven by fall in the current account, given a sizeable increase in remittances, as well as an increase in tourism and foreign direct investment¹. **The period also saw a sizeable decline in Net International Reserves (NIR)** which at the end of March stood at **USD 13.4 bn**; a figure which would cover **less than 3 months worth of imports**¹. **Given the fact that Egypt is a net food importer**, particularly of wheat, **this poses a risk to availability** and food security (Special Report).

Figure (5) Global price developments of selected food commodities



¹ Stock Exchange of Kansas City Council of Commerce.

² Stock Exchange of Chicago Council of Commerce.

³ New York Stock Exchange.

⁴ International Monetary Fund, <http://www.imf.org>.

⁵ Ministry of Agriculture and Land Reclamation.

1.4.2 Egyptian Pound-US Dollar Exchange Rate

✧ The Egyptian pound (L.E.) continued to weaken significantly in Q1 2013, losing 10% of its value against the USD, from L.E. 6.15 to L.E. 6.76 respectively between December 2012 and March 2013 (Fig.6).

✧ Egypt's net foreign reserves fell by USD 1.5 bn in March 2013 to USD 13.4 bn⁶ which could only be sufficient to cover 90 days' worth of imports⁷. Recent support agreed with Qatar and Libya, will help boost reserves⁸.

✧ In the second half of 2012, the trade deficit widened by 7.6% relative to the previous year (from USD 15.6 bn to USD 16.8 bn), driven by a rising import bill (from USD 29.2 bn to USD 30.2 bn) and

✧ Global wheat prices continued their downward trend, that started in Q3 2012, in anticipation of a bumper harvest. FAO forecasts the second largest wheat crop on record, with increases in areas planted encouraged by higher prices and a recovery from drought in the U.S.².

✧ Egyptian ports expect to receive imported wheat amounting to 22 million tons to enhance reserves³. The wheat import bill is expected to reach L.E. 23 bn exceeding that of last year by L.E. 2 bn⁴, and posing a challenge to already depleted NIR.

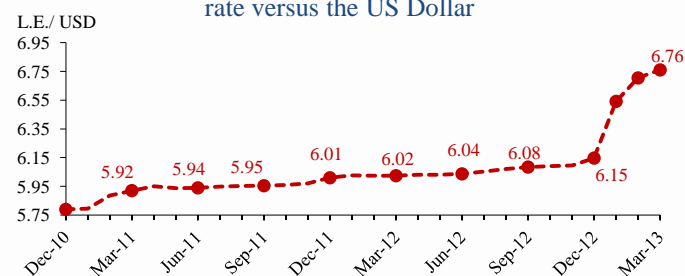
✧ Beef prices saw a slight decrease in Q1 2013, compared to Q4 2012, with imports to Egypt in 2013 expected to be lower than 2012 as domestic production is expected to grow faster than consumption⁵.

⁶ U.S.A Department of Agriculture, <http://www.ams.usda.gov>

⁷ Values of the 1st week of October have been estimated because they are unavailable in the source.

⁸ March 2013 prices are calculated as average for the first three weeks of march due to unavailability of prices for the last week of march.

Figure (6) Development of the Egyptian Pound's exchange rate versus the US Dollar



The Central Bank of Egypt

drop in exports (from USD 13.6 bn to USD 13.4 bn)¹.

✧ In March 2013, about USD 1.3 bn were made available to ensure supply of key imported commodities including petroleum products⁹.

¹ The Central Bank of Egypt, <http://www.cbe.org.eg/NR/rdonlyres/FC987D68-4925-448E-A768-56338AC7A6D1/1800/firsthalf20122013pressrelease.pdf> and <http://www.cbe.org.eg/English/>

² FAO, (March 2012), Crop Prospects and Food Situation <http://www.fao.org/docrep/017/al998e/al998e.pdf>

³ Alahram Massai, 6 April, 2013

⁴ Almalnews 20 March, 2013

<http://www.almalnews.com/Pages/StoryDetails.aspx?ID=48748>

⁵ USDA (2012), Livestock and Poultry World Trade Markets,

http://www.fas.usda.gov/psdonline/circulars/livestock_poultry.pdf

⁶ The Central Bank of Egypt, <http://www.cbe.org.eg/SDDS/InternationalReserves.htm>

⁷ Alwafed, 3 April, 2013

⁸ Fitch Ratings (April 2013), http://www.fitchratings.com/gws/en/fitchwire/fitchwirearticle/Qatar-Support-Positive?pr_id=788281 ; <http://www.bloomberg.com/news/2013-04-22/egypt-s-imf-loan-accord-unlikely-before-fourth-quarter-efg-says.html>

⁹ The Central Bank of Egypt, <http://www.cbe.org.eg/NR/rdonlyres/FC987D68-4925-448E-A768-56338AC7A6D1/1818/PressRelease28032013.pdf>



2. Vulnerable Households' Food Security

2.1 Characteristics of Vulnerable Households

- ★ The **number of households sampled** in this survey was **1680** (7458 household members) equally distributed across 10 governorates (see map on p.15).
- ★ **Female headed households constituted 21.7% of total households surveyed.** Total household heads' participation in the labor force across Egypt amounted to 67.2%, constituting about 80.8% among male and 18.4% among female household heads.
- ★ About two thirds of the sample (64.9%) are aged 30 years or under.
- ★ The rate of enrollment in education among those sampled group (6+ years old) amounted to 73.8%.
- ★ Enrollment rates increased amongst those aged 30 years or under, where it ranged between 79.1%-91.9%. These rates decreased in the 31-70 age group, where enrollment rates did not exceed 70.0%.
- ★ **Around 32.7% of the total sample (aged 6+ years) who had been enrolled in school, had dropped out of basic education** (before preparatory level). Drop-out rates increased amongst the sampled groups. In this regard, drop-out rates came to 1.1% among the 6-10 age group compared with 60.0% in the 41-50 age group and 88.7% in the 61-70 age group.
- ★ **Unemployment rate among these household heads¹** amounted to 2.7%, constituting 2.7% and 3.0% among male and female household heads, respectively. This is against the national unemployment rate of 13% in Q4 of 2012; 9.6% and 24.7% among males and females, respectively².
- ★ Table 4 highlights that the vulnerable groups are engaged in casual labor, with 63.0% of employed male household heads working as farmers, office boys, workers, sellers, or drivers; whereas 69.2% of employed female household heads work as sellers.

★ **About 16.1% of the households had at least half of the household members working.**

¹Includes those who don't work, but are seeking a job (i.e. excluding those who are economically inactive such as housewives, school or university students, army recruits, etc.).

²CAPMAS (April 2013), Unemployment data

<http://capmas.gov.eg/pepo/Labor%20Force%204th%20Quarter2012%20anda%20new.pdf>

Table (3) Break down of the sample, enrollment and drop out rates by age groups (%)

Age Group	Age Distribution	Enrollment Rate ¹	Drop out Rate ²
10-	25.9	88.8	1.1
(11-20)	22.9	91.9	21.5
(21-30)	16.0	79.1	32.7
(31-40)	11.9	69.6	45.2
(41-50)	10.0	57.2	60.0
(51-60)	7.6	47.3	85.8
(61-70)	3.9	33.1	88.7
71+	1.7	20.8	96.3
Total	100.0	73.8	32.7

¹Enrollment rates had been calculated for individuals who are 6+.

²Drop out rates had been calculated for individuals who are 6+ and stopped education whereby did not complete preparatory schooling.

Source: Assessment Survey of the Vulnerable Households, Egyptian Food Observatory, March 2013.

Table (4) Proportional breakdown of employed household heads by occupation and gender¹ (%)

Occupation	Male	Female	Total
Seller ²	14.0	69.2	17.2
Worker ³	15.3	6.2	14.8
Carrier or office boy	13.8	9.2	13.5
Driver ⁴	10.2	0.0	9.6
Farmer (not holding property)	9.7	0.0	9.1
Janitor or Security guard	4.3	0.0	4.0
Carpenter ⁵	3.9	0.0	3.6
Construction worker	3.7	0.0	3.5
Other	25.3	15.4	24.7
Total	100.0	100.0	100.0

¹ Based on investigation of the employment status of household heads in the week preceding the survey; unemployed persons are excluded before calculating the proportional breakdown.

²Includes (vegetables and fruits, ready-made garments, cattle, cigarettes, grocery ...).

³Includes (resistance to crop pests, breeding cattle and sheep, Painter, Farm, Welder, Maintenance,).

⁴Includes (private, taxi, truck, bus, tractor, Vehicle.....).

⁵Includes (furniture, construction, iron).

Source: Assessment Survey of the Vulnerable Households, Egyptian Food Observatory, March 2013.



2.2 Changes in Income and Expenditure

2.2.1 Household Expenditure

- ★ **Average spending on food and beverages amongst vulnerable households constituted some 66.1% of total household's spending this quarter, up from 63.3% in the previous quarter, and against 40.6% by an average household in Egypt¹.**
- ★ **Average monthly expenditure of vulnerable households surveyed this quarter, amounted to L.E. 661.7 (or daily per capita expenditure of around L.E. 5.3), up from L.E. 658 at the end of 2011, and L.E. 628.5 in Q4 2012, which reflect an upward pressure of prices. The static income concurrent with the soaring prices have resulted in the erosion of the households' purchasing power.**

2.2.2 Household Income and Exposure to Crisis

- ★ **Household incomes continued to remain largely static.** Based on a recall question for the previous month (March to February 2013), some **93.7% of households surveyed reported that their monthly income remained unchanged**, compared to **94.8%** in Q4 of 2012. About 5.4% of households reported an income reduction by an average of L.E. 147.5, whereas 0.9% of the surveyed households reported an income increase amounting to L.E. 144.6 on average (Fig. 7).
- ★ **About 37.1% of the surveyed households reported exposure to some form of crisis/ problem which affected their financial situation over the past year. About 44.1% of these households identified significant food price increase as a major crisis, up from one third in Q4 2012.**
- ★ **About 45.2% of the surveyed households reported having additional sources of income to supplement that from their main job.** This is against 42.3 % in December 2012.
- ★ **Retirement/ insurance pension constituted the most sizeable supplementary income source; about 35.7% of additional income slightly down from 36.2% in December 2012 (Fig. 8).**
- ★ **Governmental assistance/ social solidarity pension constituted 30.9% on average of additional income sources, while charitable assistance constituted about 26.0%, either in the form of family assistance (10.8%), philanthropic community assistance (8.2%), or assistance from nongovernmental organizations (7.0%).**

Figure (7) households income change compared to the month preceding the survey and exposure to financial crises during the previous year¹

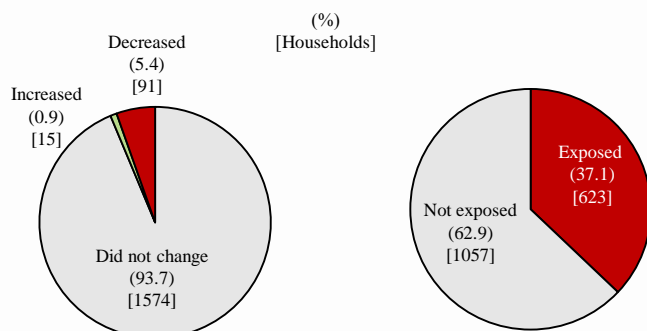
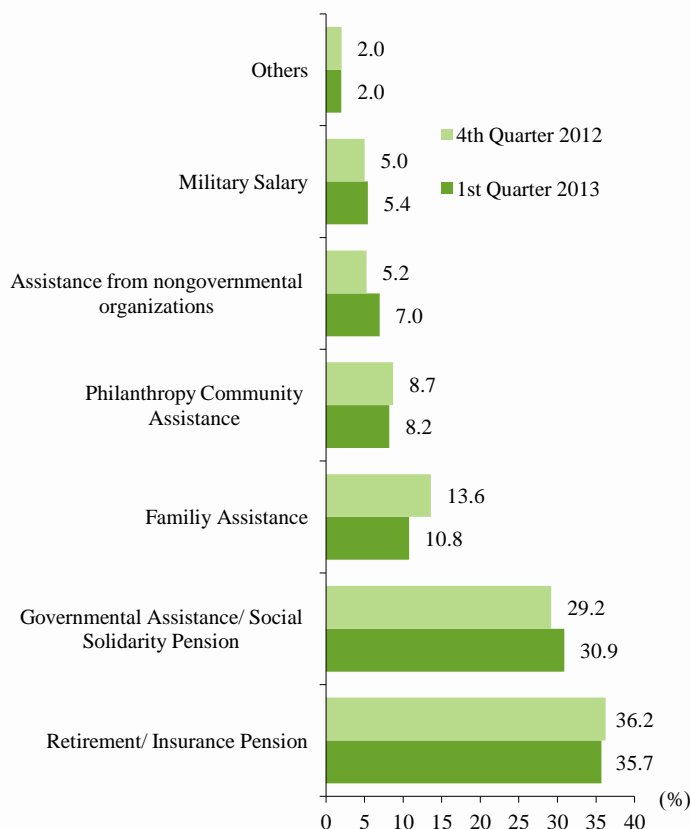


Figure 7) a) Proportional break down of households according to income change compared to the month preceding the survey

Figure 7) b) Proportional break down of households according to Exposure to financial crises over the previous year

¹ Percentages are calculated based on recall question "During the past year has your family been exposed to any crisis/ problem that affected your financial situation?".
Source: Assessment Survey of the Vulnerable Households, Egyptian Food Observatory, March 2013.

Figure (8) Proportional break down of the sources of households' additional income apart from the main job



Source: Assessment Survey of the Vulnerable Households, Egyptian Food Observatory, December 2012, March 2013.

¹ Central Agency for Public Mobilization and Statistics (2011) Household Income, Expenditure and Consumption Survey.



✧ In March 2013, **88.9% of vulnerable households surveyed reported their income to be insufficient to cover total monthly needs** (including food, clothes, shelter etc.), **up from 83.1 % in December 2012 (Fig. 9).** Of those 88.9%, some **86.3% reported insufficient income to cover monthly food needs** in Q1 of 2013. This can be explained in light of high and rising food prices, vulnerable households spending a greater proportion of their expenditure on food, which goes with a growing percentage of households reporting food price increases as the main shock they experienced over the past year.

✧ The percentage of households whose income was insufficient to meet their **total monthly needs** recorded its highest value in Qalyobia (99.4%), followed by Qena (98.2%) and Assuit (97.0%).

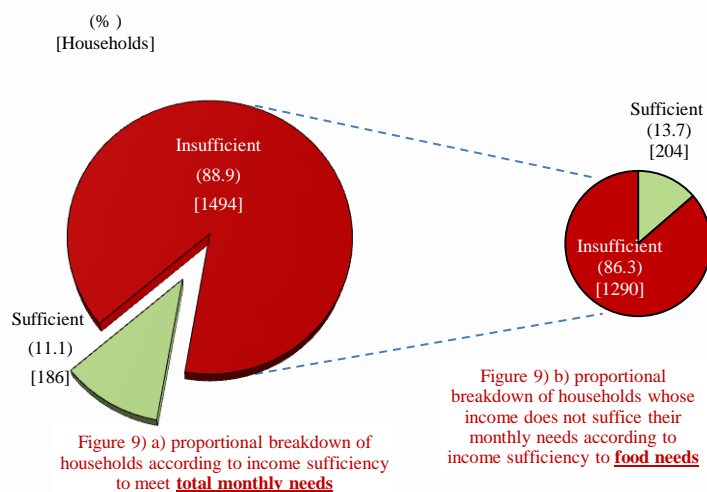
✧ The highest percentage of households stating their income was insufficient to meet their **monthly food needs** was recorded in Qalyobia (100%), followed by Matrouh (98.7%) and Cairo (98.1%). This is in line with recent findings, showing **growing pockets of income poverty and poor food consumption in Lower Egypt and greater Cairo¹.**

2.2.3 Coping Strategies

✧ Households whose income was insufficient to meet their monthly needs resorted to a number of coping strategies. **The most prevalent coping strategy in March 2013 was “consuming cheaper food items” (Fig. 10) representing 32.2% of coping strategies,** up from 30.7% in Q4 of 2012, and from 28.2% in Q3 of 2012.

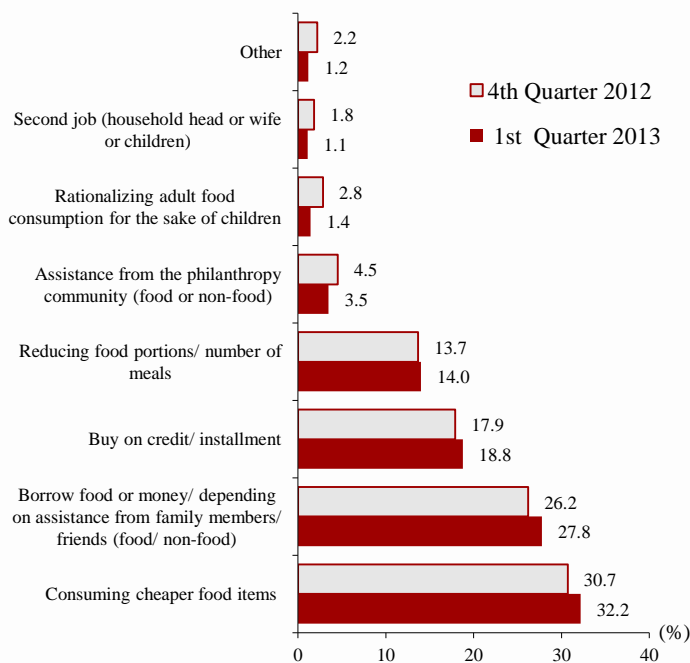
✧ **Consuming cheaper food items and borrowing are the most prevalent coping strategies that vulnerable households use to cover their needs, suggesting that vulnerable households are adopting more severe coping mechanisms where incomes do not suffice. Borrowing by families whose income was insufficient to meet their monthly needs represented 27.8% of coping strategies in Q1 of 2013.**

Figure (9) household income sufficiency



Source: Assessment Survey of the Vulnerable Households, Egyptian Food Observatory, March 2013.

Figure (10) Coping strategies used by households whose income is insufficient to meet monthly needs



Other include; a family member engaging in casual work, taking child out of school to be appended to labor market, and taking child out of nursery.

Source: Assessment Survey of the Vulnerable Households, Egyptian Food Observatory, December 2012, March 2013.

✧ Other coping strategies adopted included; **buying on credit (18.8%), and reducing food intake** either by reducing food portions or the number of meals (14.0%).

¹ Central Agency for Public Mobilization and Statistics (2011) Household Income, Expenditure and Consumption Survey.



2.3 Use of Ration Cards for Subsidized Foods

- ★ **Some 23.3% of vulnerable households do not hold a ration card (Fig. 11).** In the current sample of 10 governorates, the highest percentage of vulnerable households not holding ration cards was recorded in Red Sea (47.0%), followed by Cairo (31.0%) and Alexandria (28.0%).
- ★ In this regard it is worth highlighting that over the 11 issues of the EFO (September 2011 to March 2013) the exclusion rate (percentage of vulnerable households **not** holding ration cards amounted to an average of 22%. In Egypt some 66.7 million people have access to ration cards held. **This highlights the need to review and improve targeting criteria, particularly during challenging economic times¹.**
- ★ **The majority (95.7%) of vulnerable households holding ration cards utilized them to purchase their ration allocations.** Of those, **24.9% did not purchase their full ration allocation.**

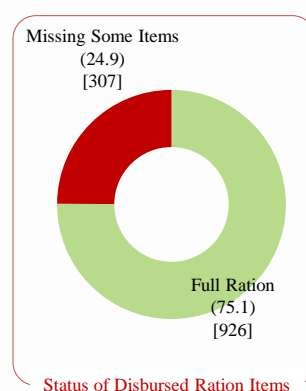
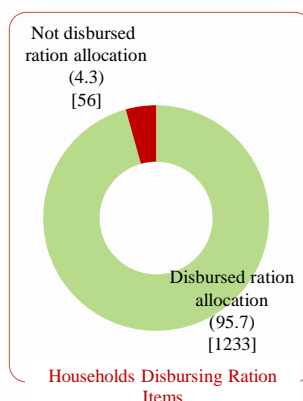
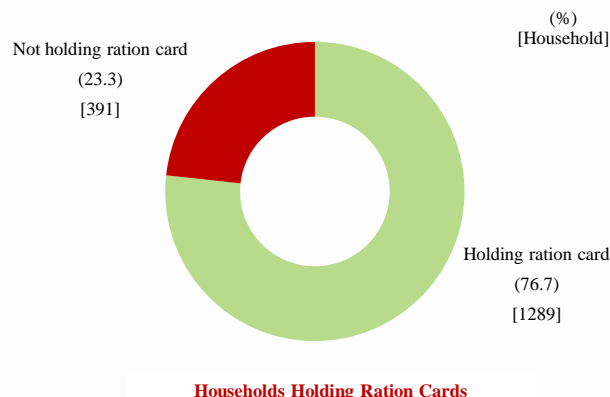
The shortage in rationed commodities at ration grocers was cited as the main reason preventing households from purchasing different commodities, followed by poor quality of commodities.

- ★ Despite the fact that oil, sugar and rice are the most widely purchased commodities on ration cards, quantities of each of the three commodities cover only 41.6%, 32.6% and 17.4% of vulnerable households' needs respectively.
- ★ Subsidized macaroni and tea are only occasionally purchased through ration cards (21.9% and 11.1% respectively), as households attributed this to low stock at the ration grocers.

Rationed commodities which are considered dispensable and could be replaced were tea (20.8%) and macaroni (7.7%). Such input match with the reported list of the least consumed commodities on ration cards which came (11.15 and 21.9% respectively) of the given items.

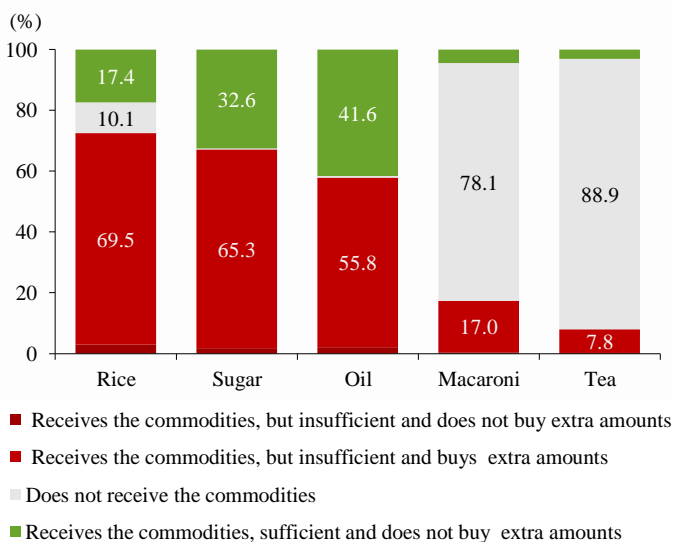
Only 3.0% of vulnerable households knew that rationed oil is fortified with vitamin (A) and vitamin (D), suggesting the need for awareness raising of the fortification and its benefits.

Figure (11) Breakdown of vulnerable households holding a ration card



Source: Assessment Survey of the Vulnerable Households, Egyptian Food Observatory, March 2013.

Figure (12) Sufficiency of the subsidized commodities on the ration cards



Source: Assessment Survey of the Vulnerable Households, Egyptian Food Observatory, March 2013.

¹ Ministry of Supply and Internal Trade (December 2012) Monthly bulletin, issue 211 .



2.4 Vulnerable Households' Food Consumption

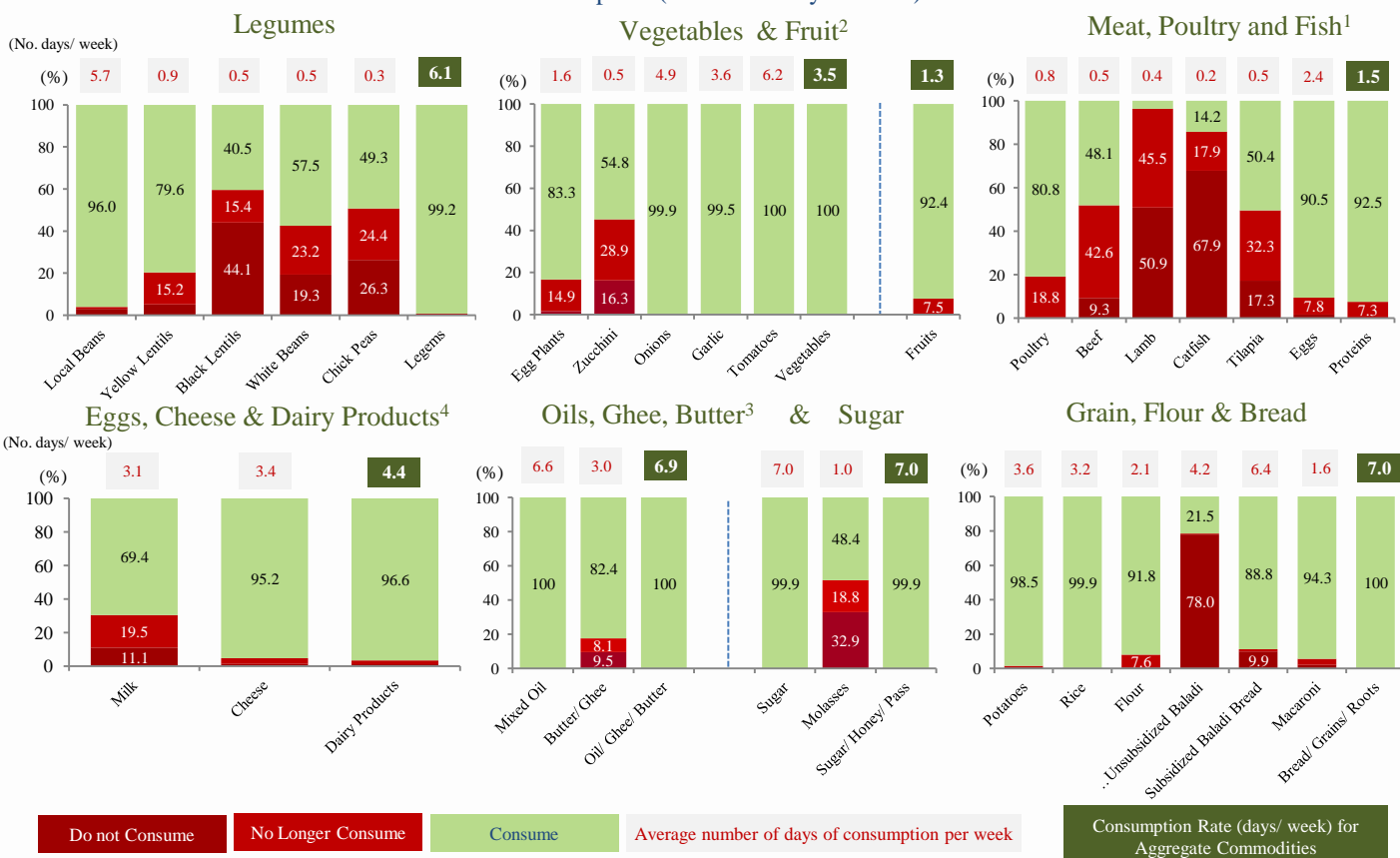
- ★ Vulnerable households' food consumption patterns remained largely stable since the launching of the EFO in September 2011, which shows a **continued over-reliance on cereals and bread, oil and sugar and a poor dietary diversity**.
- ★ As Figure 13 below indicates, **cereals and carbohydrates (grain, flour and bread) are the main food group that all households surveyed consume on a daily basis** (noted at 7.0 days a week). Of these items, subsidized bread was the most frequently consumed item (6.4 days a week) by the majority of households (88.8% of households).
- ★ **All households consumed oil/ ghee/ butter and sugar on a daily basis**.
- ★ **All households (99.2%) consume some form of legumes 6.1 days a week**.
- ★ Households surveyed show lowered consumption of vegetables and fruits. All households **consumed**

vegetables on an average of only 3.5 days a week, while 92.4% consume fruit only 1.3 days a week.

- ★ **There is low consumption of animal proteins by vulnerable households, with meat (beef and lamb), and fish (tilapia and catfish) consumed less than once a week**. About 80.8% of households eat poultry approximately once a week. **Eggs form the main form of animal protein consumed** by 90.5% of households 2.4 days a week.
- ★ **Consumption patterns are driven largely by prices**, but also the composition of subsidized rations and poor nutritional awareness.

- ★ **Given high and rising food prices that have placed certain items beyond the vulnerable's purchasing power, some households have ceased consuming certain food items including fish, beef, milk and poultry**.
- ★ **Around 42.6% of the surveyed households ceased to consume beef in the last 4.6 months on average, while 19.5% ceased to consume milk in the last 4.2 months on average**.

Figure (13) Break down of vulnerable households' consumption by commodity type (from the food basket), frequency of consumption (number of days a week)



¹Proteins including meat, poultry, rabbits, fish and eggs.

³Butter/ghee including natural and manufactured.

²Vegetables including leafy and non-leafy vegetables .

⁴Dairy Products except for butter.

Source: Assessment Survey of the Vulnerable Households, Egyptian Food Observatory, March 2013.



3. Special Report: Food Security and Wheat Policy in Egypt

3.1 Egypt's Wheat Supply Policy: An Overview

- ★ The word for bread in Arabic (“Eish”) also means life. Indeed, bread is the key staple for the poorest Egyptian households, as subsidized Baladi bread accounts for 71%¹ of the total bread they consume, and which according to findings of the EFO’s household survey is consumed on an average of 6.4 days a week by poor households.
- ★ To the same end, the annual per capita consumption of wheat for Egyptians is higher than the global average, ranging from 185.2 to 191.9 kilograms (kg) per capita over the period 2005 – 2012 compared to an average global consumption of 66.4 – 67.5 kg in the same period².
- ★ An average of 240 million loaves of Baladi bread is produced across Egypt daily, with two thirds of wheat consumed in Egypt goes to Baladi bread production³. Wheat is the most important crop in Egypt serving as a staple for the population, with approximately half of it imported in previous years, accounting for a significant bulk of foreign currency reserves. Over the last 5 years, wheat consumption in Egypt has averaged about 18 million tons annually⁵, or 12 million tons if self-consumption by farmers is excluded. Of that, domestic production (including that consumed by farmers) has averaged 8 million tons⁶, with the Principal Bank for Development and Agriculture Credit (PBDAC) procuring 3.7 million tons of wheat locally in 2012, and the remainder imported.
- ★ Egypt is the world’s largest wheat importer. On average Egypt imports 9-10 million tons annually⁴ (around 50-60% of the country’s needs)⁷ over the last

5 years, through the General Agency of Supply Commodities (GASC).

- ★ High dependency on wheat imports has made Egypt vulnerable to global price fluctuations. As a result, the Government has sought to ensure self-sufficiency by increasing local production through expansion of cultivated land and improved wheat seeds⁸.
- ★ Wheat supply policy has witnessed a series of changes. Through the 1970s and 80s, the Government activated and at times abolished the local supply policy where financial penalties were imposed on farmers who did not abide by it. As well, the Government’s policy regarding area of land to be cultivated with wheat had seen similar changes through the 1970s and early 1980s highlighting the sensitivity of enacting such policies.⁹

3.2 Current Wheat Supply Challenges

- ★ A 10% loss in the value of the Egyptian pound (L.E.) since December 2012, the downgrading of Egypt by international credit agencies twice last year, and the fall in international reserves which now amount to USD 13.4 billion¹⁰ (bn) covering less than 3 months of imports, poses a challenge to Egypt’s wheat supply.
- ★ Although Egypt’s wheat self-sufficiency rate has decreased in 2011 (48.8%) after an increase in 2010 (59.4%) compared to 2008 (54.8%) and 2009 (58.4%)¹¹, the Government estimates that this year’s domestic harvest will reach 9.5 million tons, and of that an estimated 4.5 million tons will be available for procurement by the government¹², reducing the import requirement to 8 million tons against 11.7 million tons in 2012.

¹ CAPMAS, Household Income, Expenditure and Consumption Survey (HIECS), 2011.

² OECD-FAO Agricultural Outlook 2012-2021, <http://stats.oecd.org/viewhtml.aspx?QueryId=36356&vh=0000&vf=0&i1=blank&lang=en#>

³ US Department of Agriculture, Global Agricultural Information Network report, April 2013

http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Grain%20and%20Feed%20Annual_Cairo_Egypt_4-4-2013.pdf

⁴ US Department of Agriculture, Grain: World Markets and Trade, April 2013 <http://www.fas.usda.gov/psdonline/circulars/grain.pdf>; FAO (March 2013), Crop Prospects and Food Situation, <http://www.fao.org/docrep/017/al998e/al998e.pdf#page=12>

⁵ FAO (April 2013), GIEWS Country Brief: Egypt, <http://www.fao.org/giews/countrybrief/country.jsp?code=EGY>

⁶ US Department of Agriculture, Grain: World Markets and Trade, April 2013 <http://www.fas.usda.gov/psdonline/circulars/grain.pdf>; FAO (March 2013), Crop Prospects and Food Situation, <http://www.fao.org/docrep/017/al998e/al998e.pdf#page=12>

⁷ World Food Program (2010), Baladi Bread Supply Chain Review, unpublished reports.

⁸ Egyptian Cabinet, Information and Decision Support Center (IDSC), Evaluation of Wheat Agriculture Policy in Egypt, September 2011.

⁹ Egyptian Cabinet, IDSC, Local Wheat Trade: Marketing Surplus, government procurement and prices (field study), April 2009.

¹⁰ <http://www.egyptindependent.com/news/egypt-insists-food-supply-secure-wheat-imports-dive>



3.2 Current Wheat Supply Challenges (Cont')

- ★ A GASC source noted that domestic purchasing has averaged 2.6 million tons in the last five years with an increase to 3.7 million tons during the bumper harvest in 2012¹³. Some wheat producers have voiced their concerns due to pressure to attain these figures despite soaring fuel (solar) costs¹⁴ used by tractors for harvesting and transportation to PBDAC shonas. Shortages of solar have forced many producers to buy in the black market at double or triple that of regular prices. With private traders offering L.E. 600/ Ardeb (approximately 150 kg)¹⁵ against L.E. 400 offered by PBDAC (minus transportation costs), this variation has created a disincentive for producers to make wheat available to PBDAC.
- ★ Traditionally, Egypt maintains wheat stocks of some six months-worth of supply, but given the current macroeconomic challenges, the reserves has seen a significant drop in the wheat inventory and has reached 2.116 million tons, covering 85 days¹⁶ of needs compared to stocks in Oct. 2012¹⁷. This adds the risk to availability of general wheat supply including for Baladi bread, a major staple of Egyptian households.
- ★ Access to bread is a politically-sensitive issue in Egypt, with previous shortages or price hikes resulting in popular unrest, most recently in 2008 over the food price crisis, making the issue of wheat supply a critical one.

3.3 Wheat Supply and Government's Mitigating Measures

- ★ Recent funds secured by the government from Qatar and Libya will help replenish Egypt's international reserves¹⁸ with which to potentially procure additional wheat stocks from the international markets. While Egypt has traditionally procured wheat primarily from the USA, Russia, France and Ukraine, it is now looking at non-traditional sources such as India and Kazakhstan¹⁹ in an attempt to diversify wheat importing sources and take advantage of the price difference²⁰.

- ★ The Minister of Supply and Internal Trade (MOSIT), Bassem Ouda, has also sought to leverage Egypt's traditional position as the world's top wheat importer to ease the suspicion of the country's ability to pay for imports²¹.
- ★ The easing of global wheat prices due to expected bumper harvest in 2013²² should aid Egypt's procurement of wheat on international markets.
- ★ Efforts are being undertaken by the MOSIT to improve efficiency of the wheat supply chain and quality of bread to reduce waste and losses which are estimated at 1.5 million tons annually²³, including waste through non-consumption of purchased bread or its use as animal fodder due to poor quality (51.7%), harvesting (25.7%), storage (10.8%), improper activities at bakeries (8.0%), and other waste (3.8)²⁴.
- ★ To improve the efficiency of the supply chain, the Government is building new silos and other procedures to curb black market sales of wheat of subsidized Baladi bread. New policies such as liberalizing wheat flour prices and shifting the subsidy at baker end in the supply chain was intended to slash incentives for bakers to trade wheat on the market and improve bread quality.

¹¹ Ministry of Agriculture and Land Reclamation

¹² FAO (April 2013), GIEWS Country Brief: Egypt, <http://www.fao.org/giews/countrybrief/country.jsp?code=EGY>

¹³ Interview with former GASC official dated April 21, 2013.

¹⁴ <http://english.ahram.org.eg/News/69016.aspx>

¹⁵ El Gomhoria newspaper, 15 April 2013.

¹⁶ <http://www.reuters.com/article/2013/04/15/us-egypt-wheat-idUSBRE93E0AB20130415>

¹⁷ <http://www.egyptindependent.com/news/egypt-insists-food-supply-secure-wheat-imports-dive>

¹⁸ Fitch Ratings (April 2013), http://www.fitchratings.com/gws/en/fitchwire/fitchwirearticle/Qatar-Support-Positive?pr_id=788281

¹⁹ Al Ahram, 13 March 2013, <http://english.ahram.org.eg/NewsContent/3/0/66768/Business/0/India-willing-to-export-wheat-to-Egypt-Supply-mini.aspx>; Egypt Independent, 9 April 2013, <http://www.egyptindependent.com/news/egypt-mulls-wheat-imports-kazakhstan>

²⁰ Interview with GASC official, April 21, 2013.

²¹ Financial Times, 26 March 2013, <http://www.ft.com/cms/s/0/781f945e-9560-11e2-a4fa-00144feabdc0.html#axzz2R21s28C>; Reuters, 28 March 2013, <http://www.reuters.com/article/2013/03/28/us-egypt-economy-imports-idUSBRE92R0NW20130328>

²² FAO, (March 2012), Crop Prospects and Food Situation <http://www.fao.org/docrep/017/al998e/al998e.pdf>

²³ IDSC/WFP (December 2012), Egyptian Food Observatory, Issue 10.

²⁴ IDSC (September 2011), Evaluation of Wheat Agriculture Policy in Egypt.



3.3 Wheat Supply and Government Mitigating Measures (Cont')

- ★ Private bakeries are being asked to renew the contracts with MOSIT by signing new contracts with the aforementioned obligations, with 9,000 private bakeries in 17 governorates already having signed the new contracts out of 19,000 bakeries nationwide across the 27 governorates²⁵. Bakers have voiced the decision citing rising gasoline, diesel and flour prices which they claim would reduce their profit margins. They have highlighted an increase in the cost of production per sack of flour from L.E. 80 to L.E. 120.
- ★ In addition to improving the supply-side, Egypt is under pressure to curb spending on food and fuel subsidies that account for around a quarter of the state budget, under the framework of negotiations with the International Monetary Fund (IMF) for a USD 4.8 bn loan. As part of the reform efforts to reduce government expenses, some of the plans include the introduction of smart-card system that would improve the targeting mechanism of the most vulnerable for food subsidies and limits the number of subsidized bread one can buy.

3.4 Recommendation

The following key policy recommendations could assist in ameliorating the current supply-side risks:

- ★ MOSIT may consider restructuring the role of GASC so that it acts as a private trader and maintains a strategic inventory of wheat at around one million tons, as well as allowing private sectors to operate in the market and encourage public private partnerships through the establishment of silos. This would reduce pressure in securing foreign currency reserves to procure wheat from international markets.

- ★ In the short term, losses of local wheat (over 25%) due to poor storage in open bunkers could be mitigated through simple and cost-effective mechanisms such as storage covering, complemented by current government efforts to building additional silos across the country.
- ★ Improving the quality of the flour used for Baladi bread and its storage could reduce waste throughout the production and consumption stages.
- ★ Introducing a Control Tower mechanism for the Baladi bread system could facilitate for a proper monitoring system through key performance indicators.
- ★ Raising wheat marketing capacity and minimize waste through the various stages of production, processing and final consumption.
- ★ Further investment by the Ministry of Agriculture is needed to increase domestic wheat production by developing and utilization high-yield wheat varieties, resistant to environmental stresses.
- ★ Benefit from low global wheat prices by purchasing during specific months (June through September)²⁷.
- ★ Introduce or improve the targeting provision for subsidized Baladi bread through smart cards based on national ID cards, as currently being planned by MOSIT. This would focus the provision of subsidized bread to those most in need. Given the historical sensitivity of abolishing food subsidies, partial Baladi bread for better off and full quotas for the most vulnerable households could be implemented.



²⁵ <http://www.egyptindependent.com/news/bakery-owners-decry-new-system>

²⁶ http://www.thestar.com/news/world/2013/03/19/seeking_imf_loan_egypt_plans_risky_rationing_for_subsidized_bread.html

²⁷ Egyptian Cabinet, IDSC, Impact of the global price fluctuations on the Egyptian economy, February 2003.



Annex: Survey and Composite Index Methodology

1 Monthly Burden Index Methodology

★ Index of the "Monthly Price Burden" indicates the differences between the prices of basic food commodities basket in each one of the months under observation against a specific reference time point.

★ Development of the index depended on selecting a basket of commodities representing the main food groups (27 commodities), which the Egyptian household uses in their meals. This basket would include one measuring for each selected commodity. This will include:

1. Meat, poultry and fish group including a kilo of: beef, veal, lamb, poultry, catfish, Mugil Cephalus, and tilapia.

2. Vegetables group including a kilo of: eggplants, potatoes, onions, garlic and tomatoes.

3. Legumes group including a kilo of: local beans, yellow lentils and black lentils.

4. Grain and flour group including a kilo of rice and wheat flour.

5. Butter, oil and ghee group including: corn oil (liter), sunflower oil (liter), natural ghee (kg) and processed ghee (kg).

6. Eggs, dairy products, cheese and others group including: eggs (package of 30), dairy (Liter), cheese (kg), macaroni (kg), tea (kg) and sugar (kg).

In order to measure the monthly price burden of the commodities basket, first, the monthly average of the unit price of each commodity should be calculated using the weekly prices collected by the Field Monitoring Network based on the following equation:

$$X_{jk} = \sum_{i=1}^{n_j} x_{ijk} / n_j$$

Since:

X_{jk} : is average monthly price of the commodity K in month j.

x_{ijk} : is the unit price (L.E.) of the commodity k in week i of the month j.

n_j : is the number of weeks in the month j.

Then total monthly prices of the commodities basket is calculated (27 commodities) in each of the months subject to measuring by using the equation:

$$X_j = \sum_{k=1}^{26} X_{jk}$$

Since:

X_j : is total monthly average of the price (L.E.) for the commodities basket in month j.

This total is then compared during each of the months of measuring against the reference price of this given basket which had been selected to be its price in the first week of January 2011¹ which is calculated using the equation:

¹The first week of January 2011 had been selected instead of the average prices of the month in order to evade consequent impacts of the January 25th Revolution.

$$Y = \sum_{k=1}^{26} x_{11k}$$

Since:

Y: is the reference line for measuring the monthly burden of prices.

x_{11k} : is the unit price of commodity k (in Egyptian Pounds) in the first week of January 2011.

2 Rural Price Observatory Methodology

The Rural Prices Observatory addresses prices of the commodities' basket according to the weekly market in the villages visited during the round of the Survey on the vulnerable households in all governorates except urban ones.

3 Survey Selection Methods

★ Selecting governorates:

In each round, the survey targets 10 Governorates, covering Egypt's four main regions: 2 urban, 3 Lower Egypt, 3 Upper Egyptian governorates (north and central Upper Egypt), and 2 Frontier Governorates in the Eastern and Western regions. The 10 Governorates are rotated in each round to provide a representative view national trends.

★ Selecting Districts:

In each Governorate, one urban and one rural area are targeted. For urban governorates two urban areas are targeted. Areas with the highest poverty rates based on the 2005 CAPMAS HIECS are selected for the survey.

★ Selecting Households:

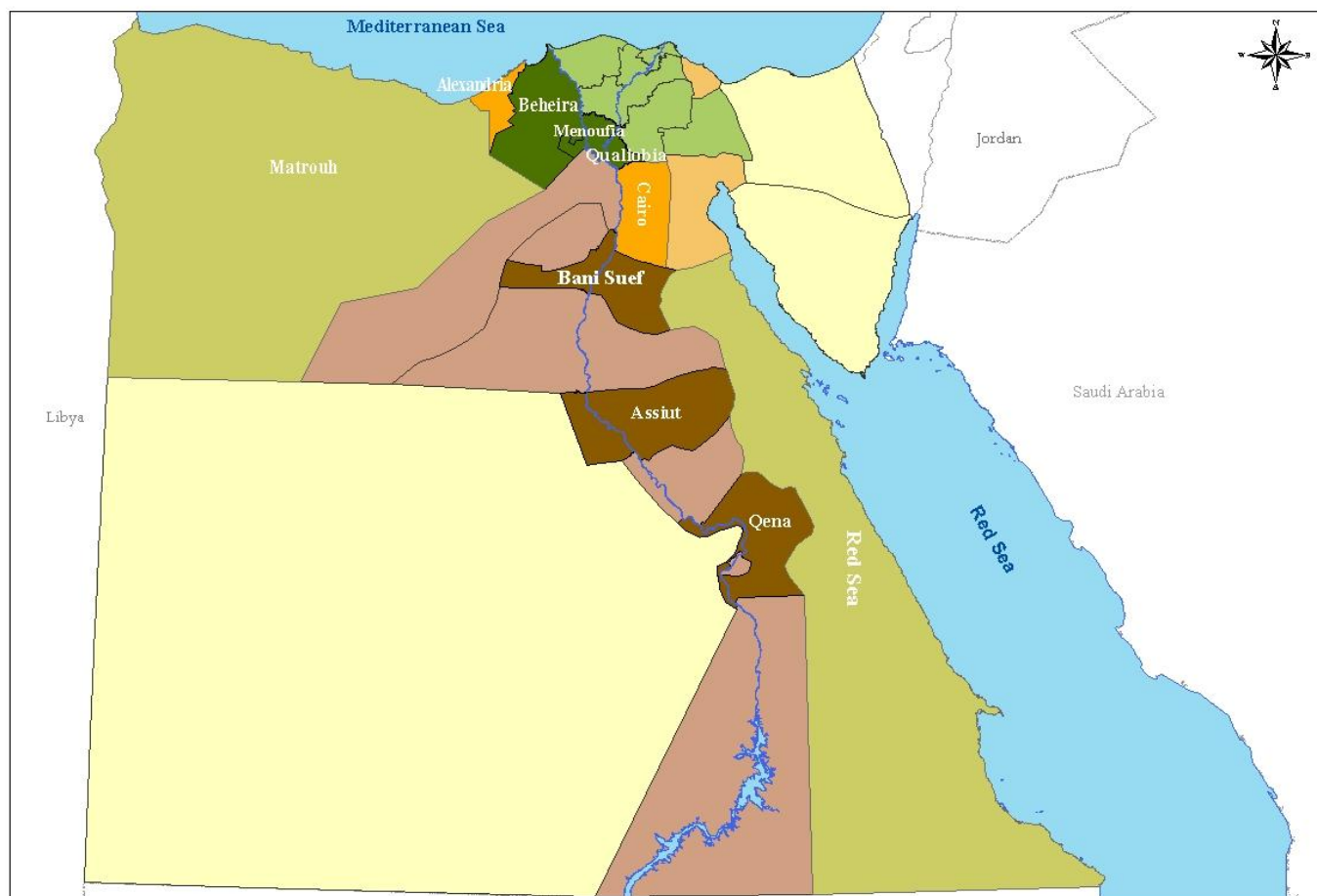
The survey was conducted in the last week of February 2013, for a sample of 1680 vulnerable households (about 168 households per Governorate – the Governorates are mapped on page 15). In each Governorate, vulnerable households are selected based on certain criteria, including: **educational status of household head** (below university degree), **occupation of household head** (those working in high or medium levels, government sector, business sector or as a contractors are excluded), and **based on income and asset ownership**: households are excluded if they have agricultural holdings, if any of its members are in private education, and if per capita household expenditure and income on an average month exceeds 300 L.E.

★ Defining Vulnerable Households:

Households surveyed are selected **on the basis of poverty** as defined by the HIECS; the 2011 HIECS shows the national poverty rate to be **25.2% of Egypt's population of 83 million**. In 2013, household selection criteria will be adjusted to focus on vulnerability to food insecurity; a more forward-looking analysis that assesses household sensitivity to potential livelihoods shocks and ability to cope with them.



Map of Targeted Governorates*



- | | | | |
|--------------------------|-----------------------------------|--------------------------|-----------------------------------|
| Upper Egypt governorates | Targeted Upper Egypt governorates | Frontier governorates | Targeted Frontier Governorates |
| Urban governorates | Targeted Urban governorates | Lower Egypt governorates | Targeted Lower Egypt governorates |

*Governorates sampled in this edition include: Cairo, Alexandria, Qalyoubia, Menfeya, El-Behera, Bani Suef, Assiut, Qena, Red Sea, Matroh

Editorial Board

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The Egyptian Cabinet
Information and Decision Support Center
(IDSC)

1, Magless El Shaab st., Kasr El Einy, Cairo, Egypt Postal code: 11582 P.O.Box: 191 Magless El Shaab

Tel.: (202) 27929292 Fax: (202) 27929222 e-mail: info@idsc.net.eg URL: www.idsc.gov.eg

Toll-Free Internet Number: 07773040