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SECTOR INSIGHT REPORT SERIES

From Field To Future: Egypt's Agribusiness Opportunity

A data-led look at market scale, export strength, and the multi-billion-dollar gaps turning Egypt's agricultural output into a value-added growth story.

NOVEMBER 2026

A COMMITMENT TO SUSTAINABLE GROWTH

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The Sector at a Glance

Egypt anchors the Middle East and Africa's food economy: the region's largest consumer base, a top-tier horticultural exporter, and agribusiness promoted by the government as a strategic pillar of Vision 2030. Relative macro-economic stability is now reopening the market to domestic and foreign investors alike.

EGYPT'S FOOD PROCESSING SECTOR KEY INDICATORS

$ 179 Bn	$ 7 Bn	$ 55 Bn	~9% CAGR
Egypt Total Food Market (2025)	Processed Food Exports (2025) +12% YoY	Food Processing and FMCG Value Chain	Egypt Food Market Growth Projected to 2030

KEY HEADLINE

Egypt is both a global food exporter and a fast-growing domestic market at once, yet only a fraction of its produce is processed.

In the upcoming decade, considerable opportunity lies in fulfilling the gap between raw output and value-added processing.



Egypt is a priority agri-food investment market in MENA, driven by its large food market, export strength, expanding processing sector, and strategic food security initiatives.

Source(s): Food Africa; AmCham; Food Export Council

POLICY TAILWIND

A Policy-Backed Priority Sector

Food processing is positioned as a strategic industrial and food-security sector under Egypt Vision 2030, a core pillar of national development with sustained backing across administrations.



INVESTOR INCENTIVES AND FACILITATION

- **30–50% investment-cost deduction** for eligible projects
- **2% customs duty** on qualifying imported machinery
- **Golden License**: one approval for eligible strategic projects
- Customs clearance reduced from **16 to 5.8 days**; two-day target
- One-stop support through **15 GAFI service centers**

Source(s): GOEIC; Cabinet of Egypt; GAFI; Egypt Vision 2030; National Industrial Strategy 2022–2030

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MARKET ACCESS

A Gateway to 1.5 Billion Consumers

Egypt's network of trade agreements connects producers to over 1.5 billion consumers across Africa, the Middle East, Europe and the Americas, in addition to competitive costs (labor 60–70% below EU averages) and a location that puts the Mediterranean and the Gulf markets 6 – 12 hours by sea.



AfCFTA
Duty-reduced access across 55 African markets

EU Partnership
Preferential access to 27 European markets

GAFTA
Tariff-free trade with 18 Arab states

Agadir
Mediterranean trade with Morocco, Tunisia, Jordan

EFTA
Switzerland, Norway, Iceland, Liechtenstein

Turkey FTA
Deeper supply-chain integration with Turkey

MERCOSUR
Argentina, Brazil, Paraguay, Uruguay

U.S. QIZs
Duty-free U.S. entry for qualifying products

Source(s): Food Export Council; GAFI

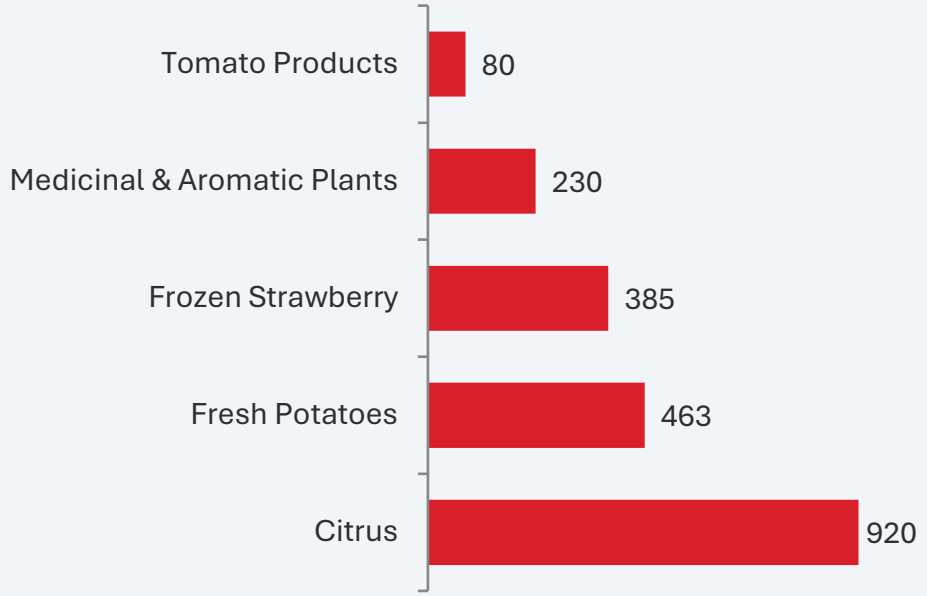
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TRADE POSITION

A Regional Export Powerhouse

Egypt is both a major food importer (wheat, corn, edible oils) and a leading exporter of horticultural and processed foods: a dual role that makes it pivotal to regional food security and trade. Agricultural exports reached 7.5 million tons in the first nine months of 2025, up ~650K tons year-on-year.

Selected Fresh and Agricultural Exports by Value (USDm)



Note: Figures include both fresh and processed agricultural products; values should not be aggregated due to differences in product classifications.

Source(s): GOEIC; Food Export Council; Comtrade

Egypt's exports of food increased by 2.5% y-o-y in 1Q2026 ti USDbn 1.68

Total Export Value (2024)
$6.1B
+21% growth from USDbn 5.1 in 2023

Frozen Strawberries
$385M
#1 globally, 26% of world exports

Saudi Arabia
$491M
Top export market (+23%)

Rising Products & Markets
$330M
United States (+42%)

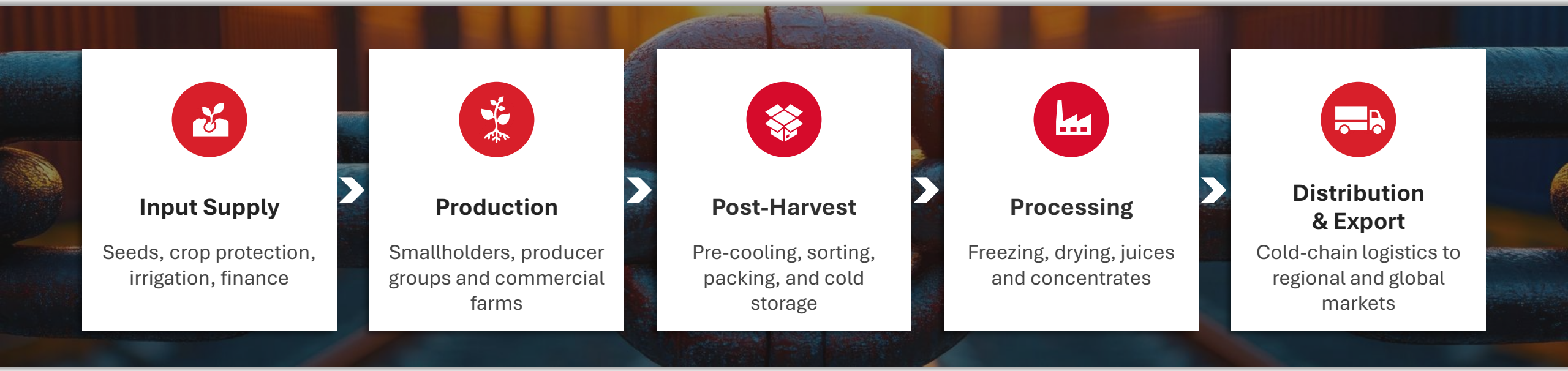
Citrus
$920M
World's largest citrus exporter

Frozen Vegetables
$1.3Bn in IQF
Ranked 4th globally in exports

VALUE CHAIN MAPPING

From Field to Market Export

Egypt's horticulture value chain spans five stages, but value and value-loss concentrate in the middle. A dual system operates side by side: export-grade commercial farms with GLOBALG.A.P. certification, and smallholder systems reliant on flood irrigation and informal markets.



Input Supply

Seeds, crop protection, irrigation, finance

Production

Smallholders, producer groups and commercial farms

Post-Harvest

Pre-cooling, sorting, packing, and cold storage

Processing

Freezing, drying, juices and concentrates

Distribution & Export

Cold-chain logistics to regional and global markets

WHERE VALUE CONCENTRATES

Post-harvest handling and processing are the chain's weakest links, and therefore its **richest upgrade opportunity**.

Source(s): FAO; IFAD; GlobalG.A.P

SUB-SECTOR SPOTLIGHT

Horticulture Processing: Where Value is Concentrated

Egypt's export crop base, proximity to Europe and significant processing-capacity gaps create a strong opportunity to move from bulk produce into higher-value formats.



IQF Freezing

- Strong demand for frozen strawberries and vegetables
- A small number of major export-grade operators
- Estimated 20–25% premium over fresh alternatives

Juice & Concentrate

- Large fresh-orange production and export base
- Opportunity to shift from fresh exports into value-added formats
- Attractive access to European and regional markets

Drying & Dehydration

- Established herbs and medicinal-plants export base
- Opportunities in controlled drying, extracts and essential oils
- Longer shelf life and lower cold-chain dependence

CERTIFICATION IS THE GATEWAY

Around 65–70% of Egyptian processors face quality or compliance gaps, reinforcing the opportunity for certification, traceability and food-safety investment. GLOBALG.A.P. supports certified farm production, while BRCGS, IFS and FSSC 22000 are important for access to major European processors and retailers. Certification improves buyer access and positioning, but premiums vary by product and contract.

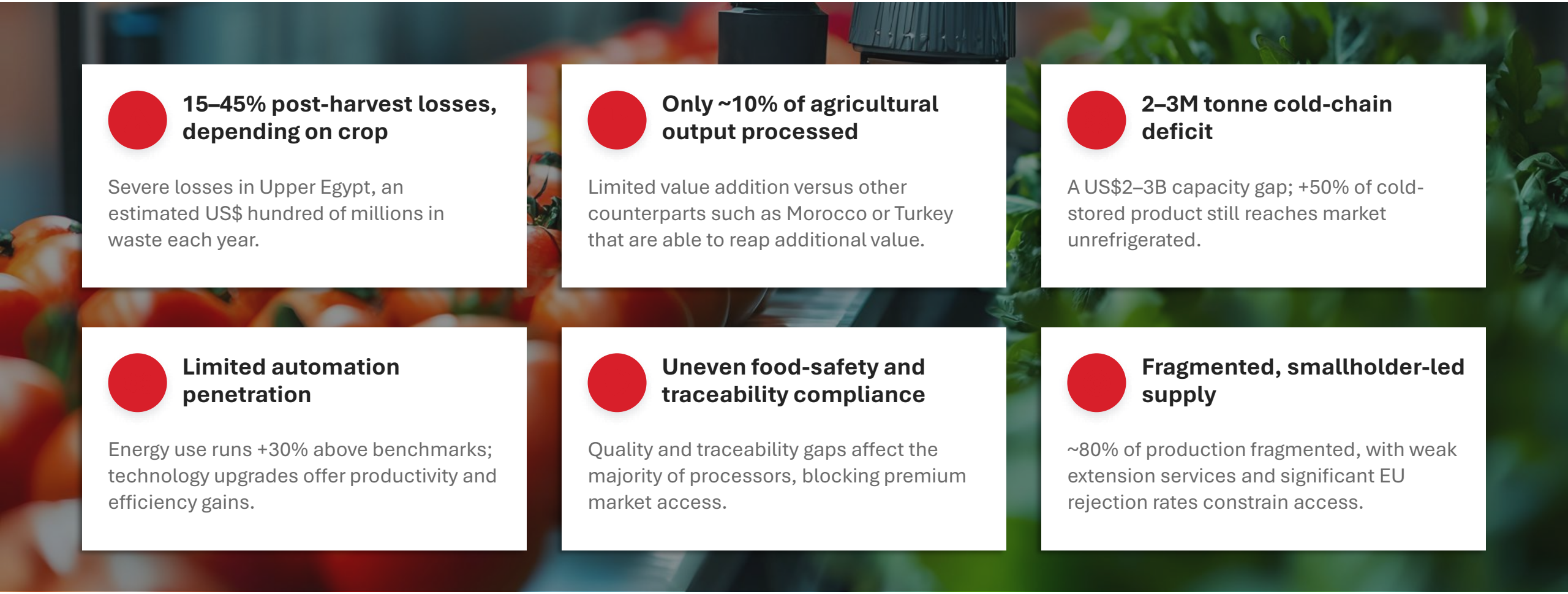
Source(s): NL Embassy; Egypt Food Processing Market Scan 2026

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STRUCTURAL GAPS

Where The Value Leaks

The same inefficiencies that constrain the sector today define its investment thesis. These are structural gaps that are persistent across business cycles and resistant to simple market solutions, which makes closing them durable and attractive.



15–45% post-harvest losses, depending on crop

Severe losses in Upper Egypt, an estimated US$ hundred of millions in waste each year.

Only ~10% of agricultural output processed

Limited value addition versus other counterparts such as Morocco or Turkey that are able to reap additional value.

2–3M tonne cold-chain deficit

A US$2–3B capacity gap; +50% of cold-stored product still reaches market unrefrigerated.

Limited automation penetration

Energy use runs +30% above benchmarks; technology upgrades offer productivity and efficiency gains.

Uneven food-safety and traceability compliance

Quality and traceability gaps affect the majority of processors, blocking premium market access.

Fragmented, smallholder-led supply

~80% of production fragmented, with weak extension services and significant EU rejection rates constrain access.

Source(s): FAO; FAO–EBRD Investment Centre; World Bank; IFAD

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FORESIGHT CONSULTING CAPABILITIES

An End-to-End Partner

Foresight Consulting brings the analytical depth, local relationships and execution support to take clients from first look to operating asset.

Market Intelligence & Sector Scans

Research-driven sizing of agri-markets, demand drivers, competitors and consumer behavior to ground go/no-go decisions

Value-chain Mapping & Feasibility

Mapping the chain from inputs to export, pinpointing bottlenecks, and assessing project feasibility before capital is committed

Opportunity Identification & Resource Optimization

Spotting untapped value across the value chain, mapped again client capabilities, and structuring interventions that lift yield and returns

Commercial Due Diligence & M&A Advisory

Evaluating target farms, processors and agri-brands to secure synergies and de-risk acquisitions and partnerships

Go-To-Market Strategy and Roadmap

Developing a comprehensive understanding of market and dynamics to define target markets, positioning, channels and pricing into a phased roadmap for smooth market entry

Concept, Product, and Brand Development

Building agri-food product concepts and brands, from "Made in Egypt" to premium, traceable ranges that earn a premium.

ESG Reporting and Sustainability Standards

With IdealRatings, embedding traceability, carbon and food-safety systems into GRI-aligned reporting for EU buyers and lenders.

Investment Gateway through GAFI Partnership

Via our GAFI MoU, studying the market in reference to client capabilities and vision. Developing entry strategies to fast-track agri-processing projects.

LOCAL INSIGHT, GLOBAL PERSPECTIVE

Since 1997

Nearly three decades advising on strategy, investment and growth in the Egyptian and regional market.

On the ground in Egypt

Headquartered in Cairo, Egypt. Close to regulators, partners and the realities of execution.

Insight that converts to action

We don't stop at analysis. We structure the deal, navigate the approvals and stay through delivery.

A commitment to sustainable growth: Our promise to every client venturing into Egypt's agribusiness economy — built to last, not just to launch.

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LET'S BUILD THE OPPORTUNITY

START THE CONVERSATION

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