The Egyptian Cabinet
Information and Decision Support Center

IDSC

Policy Perspective

Transforming Egypt into Global Trade Hub

45

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IDSC Policy Perspective

A non-periodic publication issued by the Cabinet's Information and Decision Support Center (IDSC). It covers the most prominent topics in the scene from all aspects to present a comprehensive vision regarding such topics relying on experts' perspectives.

IDSC's Commentary

As part of the efforts to transform Egypt into a global trade hub, the Egyptian government, represented by the Ministry of Transport, adopted an urgent plan to rehabilitate Egyptian ports, develop their extended hinterland, and connect them to industrial cities and urban areas by 2024.

The government's plan is based on three main pillars. The first is the State's rapid intervention to raise the efficiency of Egyptian ports by developing the transportation networks. The second aims at increasing the carrying capacity of Egyptian ports by improving customs systems. The third pillar emphasizes urgent development of the carrying capacity, such as the Tahya Misr Terminal in Alexandria Port, the first multipurpose smart station that uses modern technology to handle goods.

Accordingly, this edition of the IDSC Policy Perspective series seeks to shed light on the government's urgent plan to rehabilitate Egyptian ports by 2024 while highlighting the most prominent logistical shipping lanes and relevant infrastructure projects. In addition, it sheds light on the attention paid to seaport development projects, dry port projects, and road networks, pointing out the most prominent international agreements Egypt joined in this regard.

Transforming Egypt into Global Trade Hub

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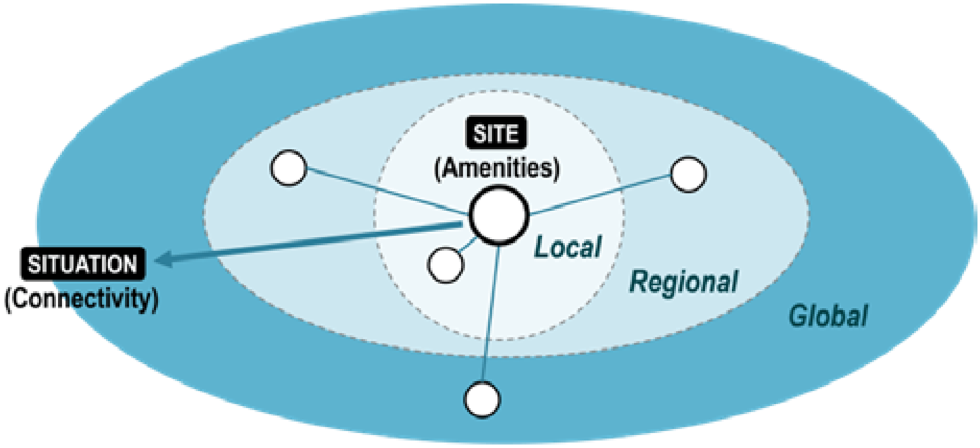
1. Introduction

There is a myriad of functions that any country provides to its residents, neighbors, and possibly the entire world. Those functions include supply chain, logistics, transportation, communication, retail and wholesale operations, political, medical, safety, defense, legal, and financial services, whereas all these activities mainly depend on the location and the situation of the country.

The favorable features of the location ensure that the country can thrive and survive. The country overlooks wide seas and can reach variable sources of fuel. It has natural barriers and a moderate climate, promoting growth and progress. Egypt's relations with other countries in the region is beneficial to its future.

In this vein, and due to its distinguished site and situation, Egypt's unique geographical position between three continents and the length of 3,000 km of coastlines on the Mediterranean and the Red Sea made it a maritime country. This promoted its connections with the outside world since ancient times and placed it at the crossroads of international logistics networks, playing a pivotal role in international trade, which was clear since the beginning of the Egyptian civilization. The first sailing for the Egyptian maritime fleet dates back to the era of Snofru king, the last king of the Third Dynasty, around 2920 BC.



With this important role in international trade that has to continue today, and in the future, the Egyptian government developed a comprehensive strategy to transform the country into a center for international trade and logistics. It is currently being implemented to pave the way for the country to be a global trade hub that is connecting Asia, Africa, and Europe. This strategy, on the one hand, includes transport infrastructure development and integration projects. On the other hand, it includes, for example, a range of institutional structure reforms and other procedures, such as international agreements endorsement and ratification, automation, and legislative modification to eliminate barriers confronting international trade and encourage and ease investment.

Accordingly, we will discuss this strategy this paper.

2. The Egyptian Transport Sector:

Background

- Transport plays a pivotal role in the economy and society. It shares 5% of Gross Domestic Product and accounts for 6.7% of every household's budget, excluding vehicle purchases. It employs millions of workers, particularly those in informal work circles.

- In 2014, Development Finance Institutions (DFIs) indicated that 40% of transport value from upper Egypt is lost due to weak logistics, noting that logistics costs have been around 20% of Egypt's GDP, while the global average goes around 10-12%. This percentage makes Egypt roads ranked among the worst worldwide.

- Transport affects the environment and public health. It contributes heavily to local air pollution and is considered the second-largest and fastest-growing source of carbon emissions. Therefore, reducing the negative impact of transport on climate become a key global policy objective since the agreements of COP 21.

- It is worth noting that the transport sector encompasses infrastructures such as railways, ports, and roads, as well as companies that make use of this infrastructure to provide their transportation services, whether for people (operators) or goods (logistics). It is a process that is not just about ensuring interconnectedness within or between rural and urban areas (local level) but stretches to ensure connectedness between Egypt and other countries (international level).

- The Egyptian Ministry of Transport developed a comprehensive logistics plan in cooperation with other ministries targeting the entire transport sector. It will be implemented under the direct supervision of the Ministry or through one of its entities (e. g. the Egyptian Company for Metro Management & Operation (ECM) that operates Cairo Metro and the Egyptian National Railways (ENR). It also involves more specialized authorities, such as the General Authority for Roads, Bridges, and Land Transport (GARBLT), which supervises the majority of roads in various governorates, the Land Transport Regulatory Authority (LTRA), which organizes land transport for passengers and goods by issuing the operating licenses for both whether nationally or internationally through cooperation with neighboring countries. The Maritime Transport Sector (MTS) develops the competitiveness of Egyptian maritime transport by fulfilling integration among Egypt's seaports. The aim is to magnify competitiveness with neighboring ports and enhance domestic and foreign investments, play an active role in the local and international economy, facilitate trade, and transform Egypt into a global center for energy, trade, and logistics regionally. It also develops the national maritime merchant fleet and maximizes its role in transferring Egypt's foreign trade. General port authorities monitor maritime projects, conclude and follow the operation contracts with international shipping lines and terminal operators awarding the concessions contracts.

- A holistic development approach was essential to attain the optimum effects of logistics systems development. Hence, a harmonized and stepwise development was required to maximize the impact of investment. This means that the logistics performance of a country does not depend only on the evolution of related transport or logistics infrastructure but also on the capacity development of related institutions, as well as human resources development in the logistics business sector, such as logistics companies, freight companies, trucking companies, customs, etc.

Accordingly, the developed Egyptian logistics strategy components can be illustrated in the following table:

Major Components	Items for Development/Rehabilitation/ Improvement
Infrastructure	Roads, railways, seaports, dry ports, river ports, logistics areas, warehouses, transport equipment, cargo handling equipment, etc.

Institutional Matters	Laws and regulations for safe and punctual delivery of goods at the right price, improvement of customs procedures (simplification of process- single window), introduction and operationalization of e-customs, legislations of bonded transport, traffic regulations, effective administrative system, legislation, development planning, monitoring, etc. Enhancement of the role of General Authority for Land and Dry ports in managing and controlling all the logistics activities. Development of international relations, ratification of the bilateral and multinational conventions, and the domestication of modal regulation law.
Human Resources	Capacity building and improving transport, logistics, and business management skills and competencies of employees, etc.
Service Provider	Including all service providers generally and SMEs especially, in the logistics and transport field to maximize the benefits for all stakeholders.

Egypt has developed an integrated logistics strategy, which includes various logistics corridors. Thus, the Ministry of Transport has adopted a plan to achieve several comprehensive developmental logistics corridors connecting several types of production areas (industrial/ agricultural/ mining/ service) with the seaports through clean, speedy, and safe modes of transport. It is also concerned with accession to international conventions and strategic partnerships with the key players in the domain, with the aim of transforming Egypt into an international trade and logistics hub.

It focuses on the Greater Cairo Metropolitan Area (GCMA), which accounts for about two-thirds of Egypt's GDP and half of the country's jobs, and lagging regions, such as Upper Egypt, which nevertheless account for a significant percentage of the population and share of agricultural production volumes. Egypt plans to establish this connectivity for freight transport through developing dry ports and logistics centers at GCMA and Upper Egypt and linking them to the Ports Complex through railways and inland water navigation.

The Ministry of Transport has developed a short- and medium-term plan until 2024 and then 2030 that targets to employ the available capabilities and comparative advantages of Egyptian ports in the Mediterranean and the Red Sea, as well as the Suez Canal.

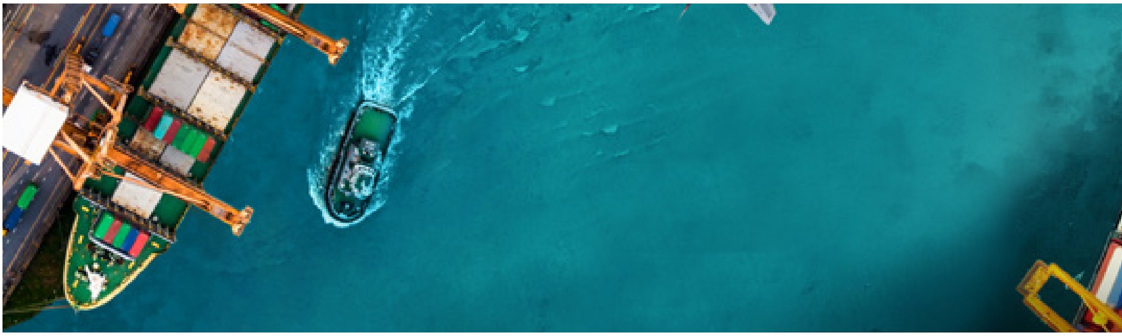
The plan aims primarily at transforming the ports from mere sea ports that receive the State's trade (export/import), as most of them operate as second-generation ports. Secondly, it is overcrowded with the State's goods and not identified with what the Egyptian State hopes for, that is, upgrading the ports to the fourth and fifth generation. Moreover, the Egyptian ports have become overcrowded due to reaching their designed capacity, which inflicts many losses on the State because of the demurrages paid in hard currency to the shipping lines and ship owners.

3. **The short-term plan until 2024 focused on:**

Firstly, the plan aims, in the short run, at increasing the efficiency of the ports and their hinterland through the State's rapid intervention. This target would be achieved through enhancing the infrastructure connectivity between seaports, hinterlands, and industrial cities by developing transport networks, including roads, railways, and inland water navigation. The goal is to ensure the smooth transport of people, raw materials, and final products, while amending the related legislation if necessary.

Secondly, increasing the capacity of the main Egyptian commercial ports by ameliorating the work environment of the customs system, regulation, and clearance; raising the efficiency of the existing basic structure of berths, storage yards, gates, and navigation channels dredging; increasing the capacity of towage force to 70 tons; developing ports' equipment, as well as digital transformation and administrative reform of all the terminals.

Thirdly, adding to the developed capacity quickly as Tahya Misr multipurpose terminal in Alexandria port, multistorey garage, timber and grains terminal. These projects increased the port's capacity with 1.5 million TEU yearly, about 10 million tons of general cargo annually, and about 200,000 cars. These projects represented more than 50% of the cargo handled by Alexandria and Dekhliah ports.

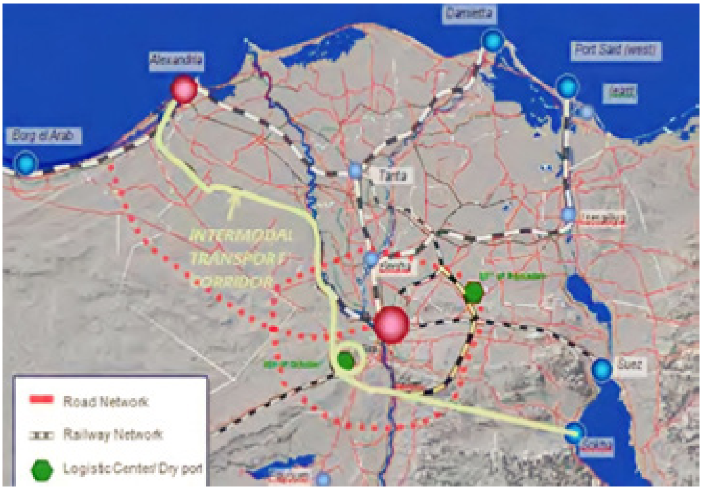


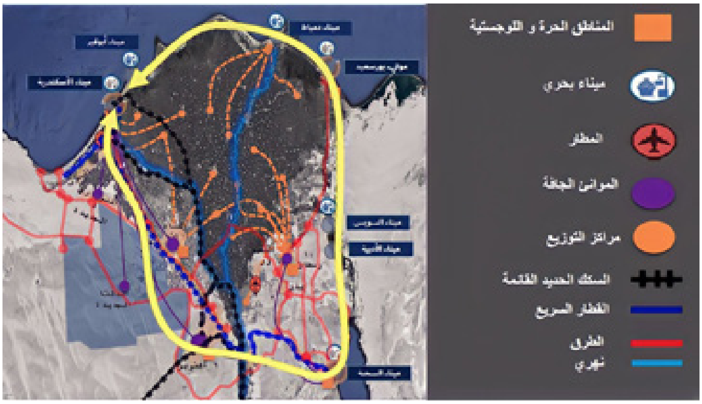
4. **The Midterm Plan 2024 - 2030 (Transforming Egypt into International Trade and Logistics Hub):**

This stage centralized on executing a developed sustainable and green infrastructure simulating international standards in engineering construction, operation, and management through strategic partnerships with the best shipping lines and terminal operators willing to invest in Egypt's logistics development plan straightaway. The Egyptian logistics corridors will be merged into the global supply chains. Eventually, this will create integrated logistics corridors connecting the production areas (industrial - agricultural- mining- services) with the seaports and dry ports via speedy, secure, and productive means of transport and logistics areas.

5. **To demonstrate, we will detail the different proposed logistic corridors, along with the infrastructure projects in the transport sector that will enhance the Egyptian logistics strategy plan:**

In the first place, the corridor of Sokhna - Alexandria, the international integrated logistics, extended from the Sokhna port on the Red Sea passing by Tenth of Ramadan dry port - Greater Cairo Metropolitan Area (GCMA), industrial area - dry port and logistics area at Sixth of October arriving to big Alexandria port.





The second logistics corridor is the Arish/Taba railway, which connects Al-Arish port on the Mediterranean and Taba on the Aqaba Gulf, passing through heavy industrial areas in Sinai. It is considered an extension of the Al-Ferdan - Bir Al-Abd - Arish line that will be developed, whereas the bridge will be rehabilitated, a new section will be installed, and the track will be reinstalled again.

The third logistics corridor is Tanta/ Mansoura/ Damietta, which is considered a vital corridor to serve many industrial areas located in the heart of the Delta and Tanta, including Quesna, Mahalla al-Kubra, Tanta, Kafr Al-Zayat, Kafr Al-Dawwar, and Mansoura. In addition, it will also help in transporting all of the Delta's vegetables and fruits. It connects Tanta and Mansoura to Damietta Port, and the new terminals currently constructed with lengths of 6.6 km to become 13 km to increase the depth up to 18 m, adding new handling and stacking yards with a length of 8 km for a total of 15 km. The goal is to increase the total area from 11.8 to 18 km^2, linking it to the railway line (Tanta/Mansoura/Damietta). It passes through the dry port in New Damietta City, where signaling systems, infrastructure, and stations are being developed on the entire line with a length of 118 km and doubling the distance from Mansoura to Damietta with a length of 62 km.

The fourth is the Cairo/Alexandria logistics corridor that connects the train station in Beshayl in southern Egypt with the port of Alexandria, passing through Sadat dry port and the Sixth of October dry port.

Finally, the Gargoub/Sallum logistic corridor connects the Gargoub port and Sallum land port.

6. Seaport Projects:

- Egypt aims at taking advantage of its 18 commercial ports and its beaches that spread over 3,000 km and achieving the ultimate goal of attracting investments.

- As shown on the map below, eight of these ports are located in the Mediterranean, namely Gargoub, Greater Alexandria (Alexandria and Dekheila), Abu Kir, Damietta, Port Said West, Port Said East, and Arish Port, while the remaining ports are located on the Red Sea: Port Tawfik, Petroleum basin, Adabiya, Sokhna, Hurghada, Safaga, Barnis, El-Tor, Newiab and Sharm El-Sheikh. It is worth mentioning that 90% of Egypt's foreign trade takes place through ports. Therefore, Egypt is currently working on developing its marine infrastructure, particularly since developing and modernizing Egypt's ports will not only contribute to promoting and enhancing external trade and logistics services, but will also contribute to commercial, industrial, and tourism development and boost the economy.

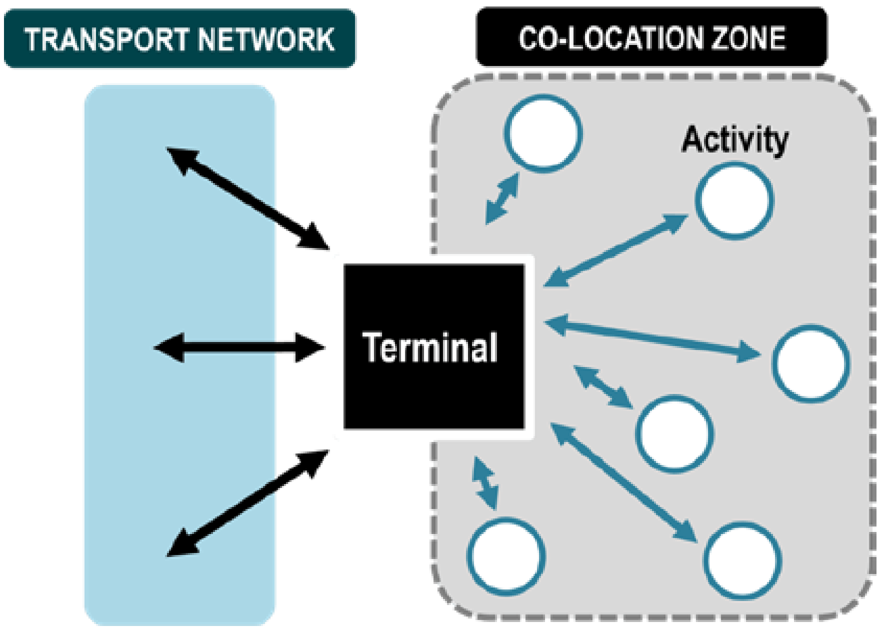
Thus, to achieve its proposed integrated developmental logistics corridors plan connecting various types of production areas (industrial/ agricultural/ mining/ service) with the seaports through clean, speedy, and safe modes of transport, Egypt adopted a strategy to develop and refurbish its seaports. After completing the midterm plan (2024-2030), new berths will be installed, with a total length of 65 km and a depth of 15 to 18 m.

The most notable elements of the seaport development strategy could be summed up as follows:

- Enhancing integration among ports in Egypt by introducing an integrated plan that aims at attracting more investments to the Egyptian ports.
- Complementing Egypt's geographical coverage of shipping services in support of overall development.
- Creating and enhancing the infrastructure and superstructure of seaports to meet the needs of market economies and international standards.
- Connecting Egyptian seaports with investment areas.
- Making Egypt a global energy, trade, and logistics hub in Africa and the Middle East.
- Modifying and improving the legislative structure related to marine life and ports in accordance with international treaties and commitments.
- Enhancing seaport security.
- Improving Egypt's international environmental classification of seaports by meeting the green port standards and achieving environmental sustainability.
- Supporting the Egyptian marine fleet by enabling it to transport around 25% of Egypt's foreign trade.
- Promoting the marine tourism development.

It is noteworthy that the most important of these berths are Safaga, Nuweiba, Berenice, Adabiya, and Ain Sokhna, as well as the ports of Abu Qir, Arish, Damietta, Alexandria, Port Said, and Gargoub on the Mediterranean.

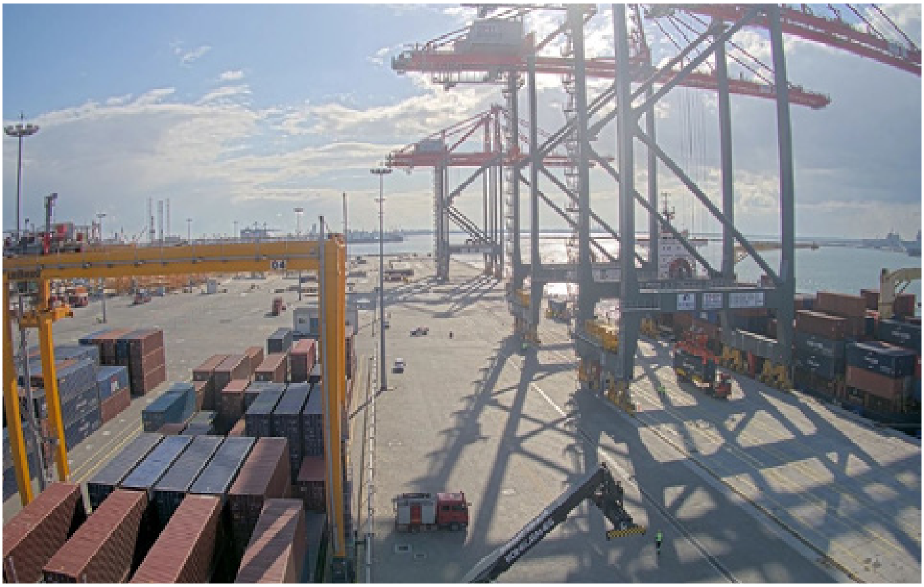
- Critical to the success of the Ports Complex is to connect the major production and consumption centers of Egypt, including the Greater Cairo Metropolitan Area, which accounts for about two-thirds of Egypt's GDP and half of the country's jobs, and lagging regions such as Upper Egypt that nevertheless account for a significant percentage of the population and share of agricultural production volumes. Egypt plans to establish this connectivity for freight transport through developing logistics centers and dry ports at GCMA and Upper Egypt and linking these to the Ports Complex through railways and inland water navigation.



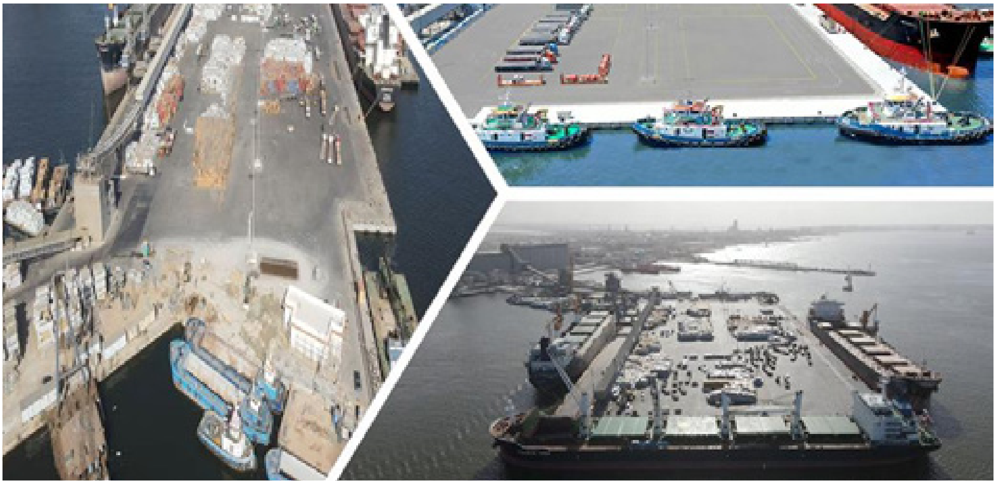
The executed seaport projects are as follows:

- **Alexandria Port Projects:**

* **The “Tahya Misr” Multipurpose Terminal Project** at berths 55-62 is one of the most significant projects in developing maritime ports. About 12 million cubic meters of clean sand were dredged to increase the depth of the water to range between 14 to 17.5 m to establish the station. A partnership has been developed between the French shipping company CMA-CGM and the Egyptian Group for Multipurpose Terminals (EGMPT) to establish the Trans Misr Terminal (TMT) company to manage the station.

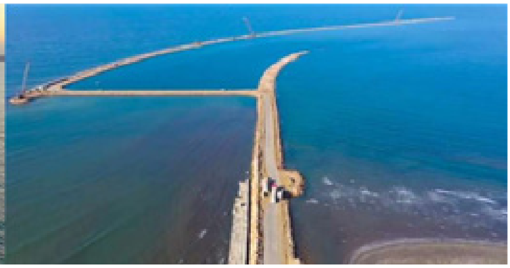


* The construction of berth 3/85 for timber and grain at Alexandria Port, with a value worth EGP 452 million, aims mainly at increasing the port's capacity to meet the growing demand for timber and grain that reach around 5 million tons annually. The measures of the berths under the project are designed to be 433 m in length and 15.5 m in depth, encompassing a land area of 35,000 m^2.



* **The Hwais Al-Malih Bridges Construction** project aims at increasing the port's river transport capacity by raising the bridge's height, a move that will allow the barges to be loaded with containers in two tiers instead of one.

- **Damietta Port:** A new western wave barrier is to be constructed with 4,345 m in length, along with extending the eastern wave barrier.

- **El-Arish Seaport:** The development project includes the construction of a berth with a total length range between 2,250 and 18 m and a depth of 2,700 m.

- **Safaga Seaport**
  * A new container terminal is being constructed in the city of Safaga. It will feature a 1,100-meter-long berth with a depth of 17 m, permitting it to accommodate both general cargo and container vessels.
  * Safaga seaport is located over the sea route of the Belt and Road Initiative inaugurated in 2013, which aims at expanding international trade by constructing networks of roads, railways, seaports, and other needed utilities that are connected through many countries in Asia, Europe, and Africa. Egypt seeks to seize the opportunity to develop its potential capabilities and integrate them into the course of the initiative.

7. Dry Port Projects:

- **The Sixth of October Dry Port Project (ODP)**

* The project is part of the State’s goal to enhance integration between logistics corridors and to uplift the importance of dry ports and logistics zones. It is worth mentioning that the port lies in the heart of the Sixth of October new industrial zone, on an area of about 0.405 km^2 and a logistics area covering 1.21 km^2. The port can handle up to 720 containers daily, with a storage capacity of 260,000 equivalent containers annually. The port is also connected with Egypt’s railway through the Sixth of October interchange.

* October Dry Port is an inland port that speeds up cargo flow between ships and major land transportation networks. The port creates acentral and fully equipped distribution point to facilitate the operations of freight forwarders.

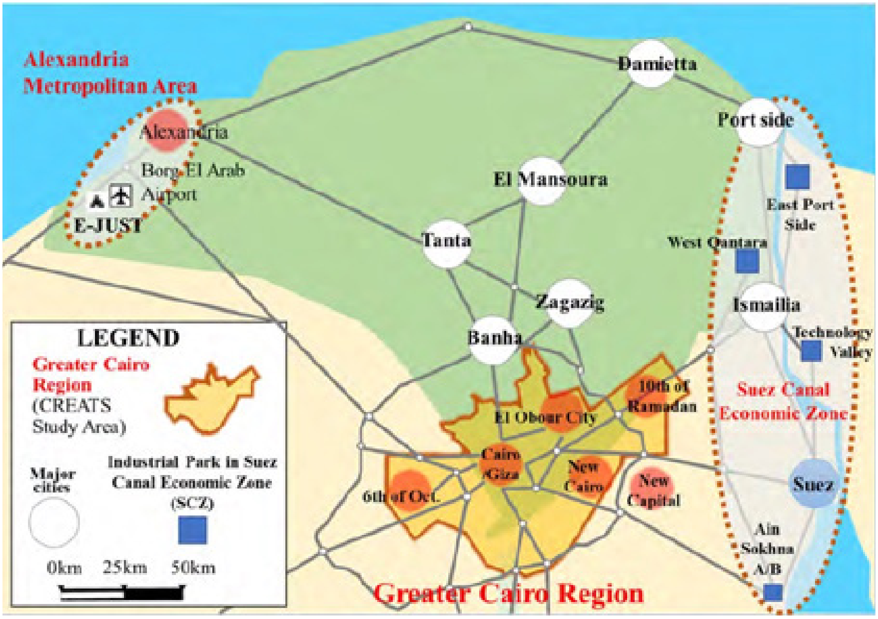
* Furthermore, the project received the GLOBAL IJ Award for best transport project under the European Bank for Reconstruction and Development’s Green Cities Program in the Middle East and North Africa.

- **Tenth of Ramadan Dry port**

* A land area of 250 feddans in the Tenth of Ramadan was allocated for the project. Dry ports will occupy 130 feddans and 120 feddans for the logistics center.
* By reducing the piling of commodities and containers at maritime ports, improving logistics services, speeding up the customs clearance procedures, and cutting down the high cost of commodities transport, the project would significantly contribute to improving the trade movement.

- **Borg Al-Arab Dry port**

* General Authority for Land and Dry Ports and Ocean Express Shipping (Egyptian company) signed a memorandum of understanding (MoU) on the establishment, management, and operation of Borg Al-Arab dry port, which is planned to occupy a land area of 120 feddans.

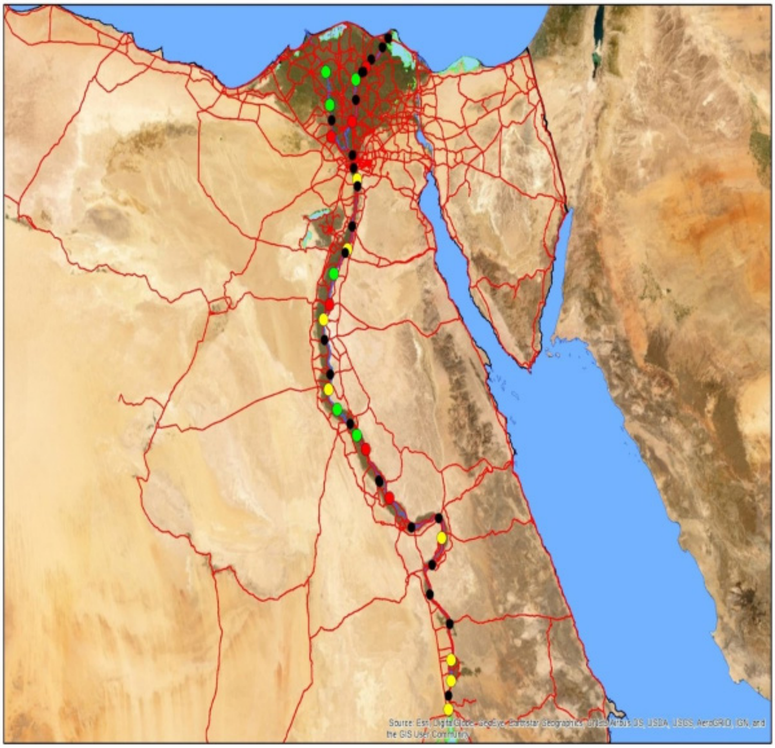


- **Saloum Land Port:**

* The port covers an area of about 286 feddans, making it the most enormous port in Egypt.

8. Road Networks

- The Ministry of Transportation said it was planned to construct new roads within the National Road Project (NRP) with a total extent of 7,000 km, of which 5,800 km have been completed, and work is underway on 1,200 km. The total length of the network of free, express, and main roads reached 30,000 km, with an increase of 11%, in addition to developing and raising the efficiency of 10,000 km of the existing road network and expanding the construction of cross axes. The number of axes on the Nile increased from 38 to 59, with a growth rate of 55%. Further, a total of 1,000 bridges and tunnels were constructed, bringing the total to 2,500, enhancing Egypt's rank in the World Economic Forum's Road Quality Index from 113 to 28 globally. The National Road Project includes the construction of up to 21 new Nile crossings, which are likely to significantly improve the integration between the cities and the rural areas.



9. **Development of International Relations And Accession to Conventions:**

- In 2020, Egypt joined the Customs Convention on the International Transport of Goods under Cover of TIR Carnets (TIR Convention), signed in Geneva in 1975, after Presidential Decree No. 396 was issued for the same year. The Convention rules the transport of goods under TIR coverage as part of the only global transit system. By joining the Convention, Egypt gains access to a tried and proven trade facilitation tool, which will increase trade and stimulate economic growth in the country and beyond into the Middle East and Africa.

- Egypt's Cabinet approved a draft presidential decree on the 1968 Convention on Road Traffic, commonly known as the Vienna Convention on Road Traffic. The Convention is designed to facilitate international road traffic and obligate signatory states to recognize the legality of vehicles from other signatory states. In turn, Egypt's accession to this Convention is considered a new milestone in achieving the Egyptian world strategic logistics corridor.

- Similarly, Egypt is preparing to accession to other multinational agreements such as AETR, ATP, and ADR.

- Not only the United Nations agreements but also Egypt is one of the first countries to join the multilateral African agreements that would facilitate trade, such as the COMESA and tripartite agreements, as well as the Arab Levant (ESCWA agreement).

- In fact, Egypt's accession and endorsement to bilateral, trilateral, and multinational agreements also give it a tremendous competitive advantage from an economic and trading perspective.

To summarize, the succeeding part will illustrate the conclusion, impacts, and recommendations of the integrated logistics strategy.

- **The Strategy's Conclusion:**

* **Development of Comprehensive Logistics Corridors:** The primary objective is to institute a network of comprehensive logistics corridors connecting various production sectors (industrial, agricultural, mining, service) with seaports. The aim is to facilitate the efficient movement of goods and promote economic development.

* **Clean, Speedy, and Safe Transportation:** The strategy focuses on using eco-friendly, efficient, and secure modes of transport within the logistics corridors to enhance the sustainability and safety of transportation.

* **International Trade Hub:** There is no doubt that Egypt has a unique strategic location that qualifies it to be a global center for trade and logistics services. This location may certainly enhance its capabilities to attract investments and stimulate economic growth.

* **Accession to International Conventions:** The strategy emphasizes aligning Egypt with international conventions and standards in logistics and transportation, enhancing the country's credibility and competitiveness globally.

* **Strategic Partnerships:** Establishing strategic partnerships with key players in the logistics and trade domain is crucial for gaining expertise, technology, and investments to support the logistics corridors' development.

- **The Strategy's Main Outputs and Impacts:**

- **Development of Logistics Corridors:** The strategy has led to the development of logistics corridors connecting production areas with seaports. This initiative aims at optimizing the flow of goods and boosting economic activities.

- **Economic Impact:** The Greater Cairo Metropolitan Area, responsible for a significant portion of Egypt's GDP and jobs, and other regions like Upper Egypt have been integrated into the logistics plan, ensuring inclusive economic growth and development nationwide.

- **Dry Ports and Logistics Centers:** The strategy includes establishing dry ports and logistics centers in key areas such as GCMA and Upper Egypt. These hubs will enhance the competence of freight transport and logistics operations.

- **Intermodal Transportation:** The strategy emphasizes linking these logistics hubs to seaports through railways and inland waterways, promoting intermodal transportation for cost-effective and sustainable logistics solutions.

- **Leveraging Existing Port Infrastructure:** Egypt aims at optimally using its Mediterranean and Red Sea ports and the Suez Canal, capitalizing on its strategic location for global trade.

- **Future Recommendations:**

* **Infrastructure Development:** Continue investing in infrastructure development within logistics corridors, including roads, rails, and waterway networks to ensure efficient transportation.

* **Technology Integration:** Implement advanced technologies such as IoT, automation, and data analytics to optimize logistics operations, enhance efficiency, and reduce costs.

* **Sustainability Initiatives:** Promote using eco-friendly transportation modes and practices, such as electric vehicles and renewable energy sources to align with global sustainability goals.

* **Public-Private Partnerships (PPP):** Foster partnerships between the government and private sector to attract investment, expertise, and innovation for logistics corridor development and management.

* **Customs and Trade Facilitation:** Simplify customs procedures and reduce trade barriers to facilitate international trade, making Egypt more attractive to global businesses.

* **Capacity building and competencies development:** Invest in workforce training and development to ensure a skilled labor force capable of managing logistics corridors efficiently.

* **Security Measures:** Enhance security measures along the logistics corridors to protect goods and infrastructure, reducing the risk of theft and damage.

* **Regular Monitoring and Assessment:** Continuously monitor and assess the performance of logistics corridors and logistics services to identify areas for improvement and adaptation to changing economic and trade dynamics.

By following these recommendations, Egypt can fully realize the potential of its integrated logistics strategy, fostering economic growth, attracting global trade, and positioning itself as a prominent international trade and logistics hub.

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