



- Competition between the South and the East because of their economic similarities
- Consequences of the Arab Spring
- Increased regional protectionism  
381 new net measures since 2012
- Uncertain business environment

**NEW BILATERAL TRADE FLOWS ARE EMERGING**



**ENERGY\***

MALTA -> EGYPT  
15% → 97%  
IN 2000 IN 2016

GREECE -> EGYPT  
14.2% → 73.7%  
IN 2000 IN 2016

**AUTOMOTIVES\***

MOROCCO -> EGYPT  
1.5% → 79%  
IN 2000 IN 2016

**CHEMICAL\***

EGYPT -> FRANCE  
9% → 49.1%  
IN 2000 IN 2016

EGYPT -> TURKEY  
14.8% → 39.1%  
IN 2000 IN 2016

TURKEY -> SLOVENIA  
37.1% → 71.6%  
IN 2000 IN 2016

**ICT\***

TUNISIA -> FRANCE  
21.3% → 41.5%  
IN 2000 IN 2016

at the expense of  
**TEXTILES**  
whose share decreased by 26 pp

TUNISIA -> SPAIN  
7% → 22.5%  
IN 2000 IN 2016



**South & East**

Diversification and moving upmarket



**Euro-Med**

Losing ground



**The Balkans**

Exports of agri-food goods and metals

\* Average export share of each sector between two countries