

## **11 Algeria**

### **11.1 - Evolution of the national economy in 2004 and outlook**

The economic growth observed since 2001 continued steadily in 2004, although the rate (5.2%) was lower than the rate achieved the previous year (6.9%). If the hydrocarbon sector is not included, the rate was 6.2%, and if both the hydrocarbon sector and agriculture are excluded, the economic growth rate was 6.8%. The other economic sectors were thus relatively dynamic, contrary to what was observed in previous years. The building and civil engineering sector in particular was stimulated by high demand and thus achieved a rate of 8% (compared to 5.5% in 2003), accounting for 32% of growth in GDP. With a growth rate of 7.7%, the services sector achieved the highest rate after the building and engineering sector, And the industrial sector – where a negative growth rate was recorded on average over the period from 1990 to 2003 – achieved 2.6% growth in 2004 (compared to 1.4% in 2003).

Agriculture remains a sector which considerably influences GDP growth (cf. Figure 1), the very marked variation in the growth of this sector from one year to the next being closely correlated to the variation in GDP growth.

In production terms there was no change in the rating of the main economic sectors compared to the previous year: the hydrocarbon sector remains clearly in the lead with 38% of GDP, followed by the services sector (21%) and agriculture (9%). The building and civil engineering sector accounts for 8% and the industrial sector comes last in the list with 7% of GDP – despite encouraging signs of recovery.

Gross domestic expenditure was higher in 2004 than in 2003, growing at a rate of 7.6% (compared to 5.3% in 2003); this was due to the final consumption expenditure of households, whose growth rate rose from 3.8% to 5.4%, and, to a lesser extent, to the gross fixed assets accumulation, where the growth rate was 8.1% (as against 7.8% in 2003).

The growth rate of the volume of imports rose considerably in 2004, from 2.4% to 11.6%, mainly in order to satisfy the demand for the goods and services necessary for implementing the 2001-2004 economic recovery plan, which is coming to an end. Consumption benefits more from imports than from productivity goods and intermediate goods, the items which progressed, in order of importance, being non-food consumer goods, food consumer goods, capital goods and intermediate goods. There was also a marked increase in services imports (9.2%). The export growth rate dropped sharply, on the other hand, from 7.9% to 3.8% in 2004, a decrease which is to be explained by a fall-off in the increase in foreign demand for hydrocarbons. Although performance was better in 2004 (US\$660 million

compared to 470 million in 2003), the share of the non-hydrocarbon sectors in total exports is still very low. Despite the divergence in import and export growth rates, there is still a large surplus on the current account of the balance of payments (US\$10.9 billion in 2004<sup>1</sup>) as the result of the steep rise in oil prices in the course of the year (US\$34.26 per barrel in the first six months and US\$42.98 in the last six months).

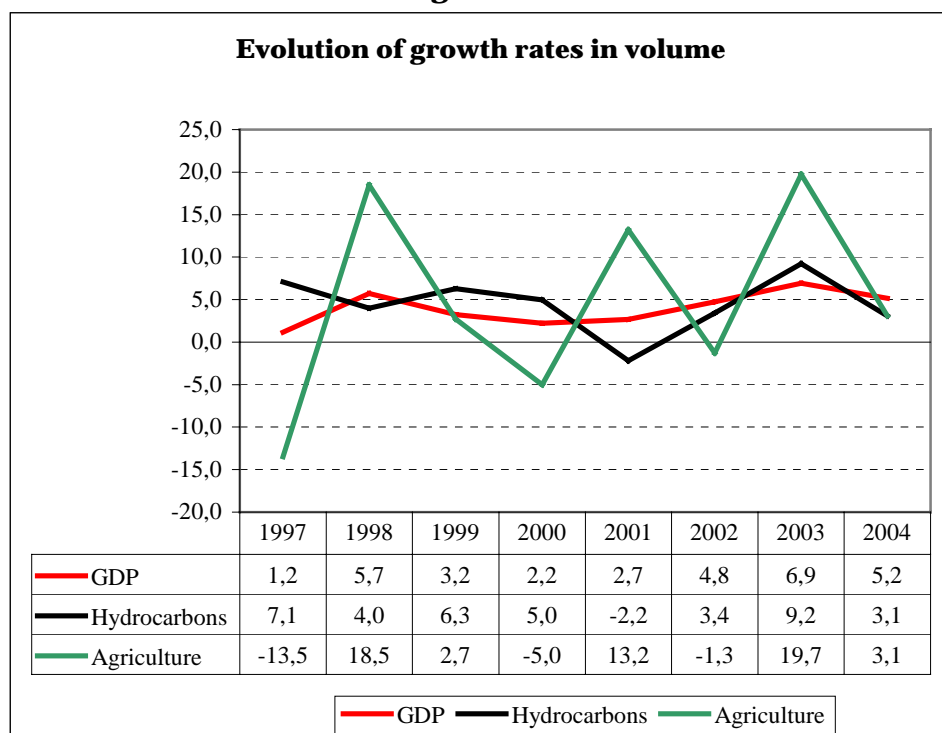
The balance of payments registered a surplus of US\$9.1 billion in 2004 despite a deficit on the capital account of US\$1.69 billion (compared to a deficit of 1.37 billion in 2003); this deficit is to be explained by the prepayments of foreign debt principal at high fixed rates and, to a lesser extent, by the foreign investments of the national oil company (SONATRACH).

The good performance in the balance of payments is reflected in the evolution of the official foreign exchange reserves, which amounted to US\$43.1 billion at the end of December 2004 (compared to US\$32.9 billion at the end of December 2003 and US\$4.4 billion at the end of December 1999). Thanks to these foreign exchange reserves, the exchange rate of the dinar against the American dollar was stabilised (DA72.61 for 1 US\$) in the period from December 2003 to December 2004). As the result of the sharp rise of the euro against the dollar the DA rate against the euro depreciated (DA91.27 for 1 euro at the end of December 2003 and DA98.95 at the end of December 2004).

In view of the sound financial situation of the country it was also possible to reduce the debt and the debt service ratio. The medium and long-term foreign debt stock dropped to US\$21.4 billion at the end of 2004 (compared to US\$23.2 billion at the end of 2003 and US\$28.1 billion at the end of 1999). The foreign debt service ratio dropped to 12.6% (excluding prepayments) in 2004 (as against 17.7% in 2003 and 47.5% in 1998). The ratio of the foreign debt to GDP dropped to 26% in 2004 (compared to 35% in 2003 and 47% in 2000). And finally, the public debt ratio (foreign debt and domestic debt) to the gross domestic product was under the 40% mark in 2004.

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<sup>1</sup> Provisional figure (source : Bank of Algeria : <http://www.bank-of-algeria.dz/indicateur.htm>).

**Figure 11.1**

Monetary policy helped to bring monetary inflation down and to curb price inflation and contributed to economic growth. After the high inflation rate registered in the first six months, price inflation dropped to 2% at the end of 2004. It can thus be stated that monetary stability has combined with non-inflationary economic growth in the course of the past few years.

According to the official statistics, the unemployment rate was apparently no higher than 17.7% in 2004, compared to the 23.7% announced the previous year (cf. Table 11.2) – a sharp decrease which is apparently attributed to the underestimation of unemployment amongst women (Ighil Ahriz, 2005). Current employment grew by 16.7% between 2003 and 2004 as the result of the upswing in the "employers and self-employed persons" category (33.2%) and in the "family worker" category (32.1%). Growth in the number of permanent wage earners was low (2.6%), however, so the growth in employment was in fact accompanied by a certain degree of employment insecurity.

Whereas the country's outward-looking policy is being implemented and the major macroeconomic balances are being achieved reasonably successfully, this cannot be said of the privatisation of public enterprises, although the process has been

underway for some 10 years. Although 2004 seems to have brought progress in this field – 142 undertakings were apparently privatised bringing in a revenue of DA33 billion to the Treasury (approximately just over €3 million) (Cherfaoui, 2005) –, only small units were concerned, and the bulk of the public sector has still to be privatised. Other objectives are still in limbo or have merely been vaguely outlined – in particular the measures to streamline the civil service, where salaries tap a large proportion of State revenue without any significant increase in the services provided, or the efforts to fight corruption, which, although they seem to have been stepped up in 2004 and 2005<sup>2</sup>, are still limited<sup>3</sup>. Other parameters which the “country” risk rating agencies take into account place Algeria at a disadvantage: the degree of transparency of public markets, the arbitrariness of decisions, the malfunctioning of the judiciary system<sup>4</sup>, etc.

The economic outlook could be promising if more efforts were made to integrate the various sectors to a greater extent. For the public authorities' intention to resolutely promote that policy of integration is not yet clearly visible. The 2001-2004 economic recovery plan admittedly achieved several results in terms of GDP growth and job creation, but its effects would have been much more beneficial had the resources released benefited Algerian undertakings to a greater extent rather than foreign undertakings. Unless the necessary changes are made in this context it is to be feared that the second economic recovery plan for the 2005-2007 period – which makes provision for US\$55 billion of investments over the period from 2005 to 2009 – will create more jobs in other countries (through Algeria's imports) than it does in Algeria.

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<sup>2</sup> Many high-ranking officials from various administrative departments are currently behind bars for affairs of corruption and misappropriation of public monies (Mekfouldji, 2005).

<sup>3</sup> The committee for examining corruption which was set up by the government submitted a report to the Minister of Justice at the beginning of 2005, advocating, *inter alia*, that a corruption observatory be set up and a law be passed which would repress corruption and influence peddling more resolutely (source : <http://www.quotidien-oran.com/quot3042/even.htm>).

<sup>4</sup> The « Nord Sud Export » international rating agency has classed Algeria at level B1 for the short-term country risk, i.e. in the same category as Morocco and Tunisia, whereas the OECD export credit insurance agencies have re-rated the Algerian risk, moving the country from class 4 to class 3 on a scale of 7 classes of risk (Medjahed, 2005).

## **11.2 - The context of the global economy and international trade and its implications for the Algerian economy and more specifically for the agricultural sector**

The global economy registered relatively marked expansion in 2004 (5.1% compared to 4% in 2003), although it was curbed to some extent by the rise in hydrocarbon prices towards the end of the year. The growth rate was higher than expected in the United States (4.4% in 2004 compared to 3% in 2003). It was dynamic in China (+9.5% compared to 9.3% in 2003) and relatively sustained in most emerging and developing countries (a growth rate of 7.3% in India, for example). In Europe and Japan, on the other hand, the growth rate was disappointing, although it progressed (2% in Europe in 2004 compared to 0.5% in 2003, and 2.6% in Japan as against 1.4% in 2003); this low rate was due to sluggish exports and subdued domestic demand (IMF, 2005).

This marked growth in the global economy resulted in a steep rise in hydrocarbon prices, which was to Algeria's advantage. Oil demand is reported to have increased by 3.4% in 2004 instead of the usual rates of 1% to 2% registered in previous years; it was boosted by the US (25% of oil demand) and China (8% of demand).

The effects on the national economy of the favourable trend in the world economy were limited to the benefit obtained from the rise in hydrocarbon prices, since Algeria's export capacities in other sectors are very limited. However, the increase in oil revenue did enable Algeria to import more, which it promptly proceeded to do in 2004, as has been seen above.

The effects of the global economic context and international trade on the agricultural sector can be seen in variations in the prices of imported equipment and inputs for agriculture, competition on the national market of imported agro-foodstuffs, or an increase in the export of agricultural commodities. However, there seem to have been few effects on the Algerian agricultural sector in this respect. As regards competition from imported agro-foodstuffs, customs protection measures seem to remain fairly dissuasive for importers.

## **11.3 - Evolution of agricultural aggregates in the economy**

The agricultural sector is the third economic sector in terms of formation of value added. It accounts for 9.2% of GDP – a slight decrease compared to 2003 (9.7%) – ranking third after the hydrocarbon sector (37.9%) and the services sector (21%).

The rural sector is still very important in terms of employment, accounting for almost 42% of the labour force in 2004. Its contribution to employment growth was considerable, since the working farm population increased by 16.2%, which was almost the same rate as the increase in the urban labour force (17%).

Agriculture is reported to have accounted for approximately 20.7% of total employment in 2004 (1 627 125 jobs), i.e. 14.5% more than in the previous year (1 412 340 jobs), despite a slight drop in its share of total employment (21.1% in 2003). It is still well in the lead, since the industrial sector accounts for only 13.6% of the labour force and the building and civil engineering sector accounts for only 12.4%.

As regards foreign trade, agro-food imports decreased slightly in terms of their share of total imports (25.5% of Algeria's total imports in 2004 compared to 26.3% in 2003), but they increased sharply in terms of absolute value (+30.5% expressed in US\$). On the other hand, agro-food exports dropped in relative terms from 0.6% of total exports in 2003 to 0.5% in 2004. They increased by 21%, however, in absolute value due mainly to canned fruit and vegetables (+77%) and fisheries products (+67%). There is still a marked imbalance in the agro-food balance of trade, with an import-export ratio of only 3.5%.

## **11.4 - Agricultural products**

### **11.4.1 - Crops**

It must be noted that the statistics on agricultural commodities still consist of very rough estimates calculated by the wilaya agricultural departments, which may possibly subsequently be "corrected" at the central level by the Directorate for Agricultural Statistics. Although these estimates are drawn up with the best will in the world, contradictory data are unavoidable, and the contradictions are sometimes flagrant. It is hard to see, for example, how wool output could increase by 15% from 2003 to 2004 when sheep numbers grew by only 4%. Similarly, it would seem surprising that honey output should have increased by 33% in a year that was drier than the previous year!<sup>5</sup> There are other examples of contradictory figures (an increase in sheep numbers and cattle headage and an increase in red meat output).

Yet all of the conditions for producing relatively reliable statistics are now met. The General Agricultural Census conducted in 2001-2002 constitutes a recent survey basis from which a representative sample can be drawn which could be surveyed each year. The decentralised administration of the Ministry of Agriculture and Rural Development (MADR), which is well established at wilaya, daïra and municipal level, comprises a large number of officials who could easily be given further training and could visit the farmers in the sample selected at least twice a year. The land registry departments have completed their survey of a large number of municipalities, whose agricultural areas are now known with precision in terms

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<sup>5</sup> This increase is said to be explained by the sharp increase in the number of subsidised beehives in 2004 compared to the previous year.

of parcels. It would be desirable for the Ministry's Directorate for Statistics to carry out this work, which could provide precious performance indicators for the Ministry's policymakers.

Notwithstanding the above, agricultural production registered moderate growth in general (3.1% in volume) due to rainfall that was not altogether satisfactory, the decrease in common wheat output resulting from fungal attack (rust fungus), and the damage caused by grasshoppers in certain regions in the south of the country and on the high plateaus. As is usual in rather dry years, performance in the animal production sector was better than in the crop sector. Animal production increased by 5% and crop production by 8% (in terms of prices).

Since rainfall was less favourable in 2004 than in 2003, there was a slight decrease in the agricultural commodities grown in rain-fed areas. The growth rate for cereals output was thus negative (-6%), a decrease that is to be explained by the stagnation in barley production and the sharp drop in common wheat production (-37%). Although the average yield in 2004 was lower than the figure recorded for 2003, it was nevertheless almost twice as high as the average for the period from 1991 to 2000. Was this the effect of the subsidies granted for intensification? This question cannot be answered, since no data have been published on subsidised acreage and its development over time.

A 48% growth rate was nevertheless registered for fodder crops, where most of the acreage is rain-fed (mainly vetch-oats); this result is to be explained by a marked increase in acreage (+69%)<sup>6</sup> and yield (+29.9%)<sup>7</sup>. Here again, one notes an apparent contradiction between the marked increase in natural fodder yield (+20.6%) and the fact that 2004 was a relatively dry year compared to the previous year.

Pulse production stagnated despite a slight drop in yields; output level was maintained due to the increase in acreage (+6%). The situation in the pulse production sector remains a matter of concern, when one bears in mind that Algeria imported over 157 000 tonnes of pulses in 2004, whereas the country only produced a little over 49 000 tonnes on average in the period from 2000 to 2004. It would thus seem that the subsidies granted for these crops (for the improvement of tillage and the purchase of fertilisers and pesticides) do not provide sufficient incentive.

Horticultural production increased by 11.6% due mainly to the increase in acreage (+6.5%). Yields are still low compared to those in the northern Mediterranean

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<sup>6</sup> There was in fact no increase in acreage : since the statistical departments realised that the acreages which had existed in previous years had not been recorded in terms of area and output, they included them in 2004, without carrying out the same modification for 2003. Hence the spectacular increase.

<sup>7</sup> The fodder yields have been « readjusted » by the Technical Institute for Major Crops, since it considers that the estimates made by the agricultural departments in previous years have been too low. So the increase in yields between 2003 and 2004 is not in fact a real increase.

countries, despite a 49% increase in 2004 compared to the average for the 1991-2000 period. Potatoes are an example of this with a bumper yield of 20.3 tonnes/ha in 2004, whereas according to FAO figures a yield of 28.4 tonnes was registered in Spain for the same year, 24.7 tonnes in Italy and 22.3 tonnes in Morocco.

The only three industrial crops where output was significant are industrial tomatoes, ground nuts and tobacco. Industrial tomato producers and processors in the north-east of the country (the main producer region) have been complaining regularly for several years of what they regard as intolerable competition from imported concentrated tomatoes. Yet despite this, the official statistics show quite considerable increases in output and yields: +35% for output and +34% for yields between 2003 and 2004. Tobacco growing is subject to fairly marked fluctuations in yield since it is a crop grown mainly in rain-fed areas. Output increased by 34% in 2004 despite the fact that there was less rain than in 2003. The 31% growth in yield in one single year is rather puzzling. Ground nuts are grown mainly in the north-east (El Tarf Wilaya) and in the southern wilayas. Although acreage grows regularly, yields are still low.

Fruit-tree crops have developed tremendously since 2000 in the context of the national agricultural development plan (PNDA), one of whose principal objectives is to convert low value-added and unpredictable crops to crops which have a higher value added and are less affected by rainfall uncertainty. The plantations that have been carried out since 2000 have now started producing, and this no doubt explains the 8% increase in output. It will be noted that yields are progressing less rapidly than output; this is to be explained by the fact that many farmers are growing fruit-tree crops for the first time.

In the citriculture field, orchards covered some 45 000 ha on average in the period from 1991 to 2000, having at last reached the acreage they covered immediately after independence. The area is now progressively expanding; it covered over 59 000 ha in 2004, i.e. 30% more than the average for the period from 1991 to 2000. Output and yield increased by 8% and 7% respectively from 2003 to 2004, but domestic demand is far from satisfied in view of consumer prices, which are still high.

The vineyard acreage was approximately 97 000 ha in 2004, still a long way from the 335 000 ha registered in 1965. As is the case with fruit-tree crops, vine production has been greatly encouraged by plantation subsidies since 2000. The average acreage increased by 43% between 1991-2000 and 2004. Output only grew by 2% between 2003 and 2004, whereas the increase recorded in yields was spectacular: almost 20%.

In the olive sector, 2004 was a prosperous year with yield per tree increasing from



11 kg to 29 kg (+170%) and an increase in oil-olive output of 294%<sup>8</sup>. Olive oil production followed the same trend, progressing by 357% between 2003 and 2004, since the oil yield had increased appreciably.

Date output decreased in the same period, on the other hand, due to lack of irrigation in certain zones and inadequate pollination. The average yield per tree also dropped (-13%).

Relatively speaking, forestry products are the best covered by statistics in view of a long-standing tradition of the forestry departments and the fact that they are required to quantify the commodities produced on the acreages that they lease out. Timber and firewood output increased by 12%, whereas cork output dropped by 3%. Esparto grass output doubled, but it is still insignificant compared to the output registered at the end of the colonial period and in the first years of independence (100 000 tonnes), which made Algeria the leading world producer of this raw material.

#### ***11.4.2 - Animal products***

Animal products are even less well covered by the official statistics than crops, since the relevant departments of the Ministry do not use reliable techniques. Notwithstanding what was pointed out above with regard to the contradiction between the development of sheep numbers and rural production and between honey output and the fact that 2004 was, relatively speaking, a drier year than 2003, red meat output apparently increased by 6.5% (with 1% growth in cattle stock and 4% in the number of sheep)<sup>9</sup>, white meat (poultry farming) output increased by over 8%, eggs by 6%, milk by 19% (but then artificial fodder output apparently increased by 96%!), honey by 36%...

The effects of subsidisation policy on animal production do not seem to have been particularly pronounced, especially as far as cow's milk output is concerned. In Constantine Wilaya, for example, it is reported that collected cow's milk output increased by 63% between 2001 and 2004, but then milk collection only concerned 18% of total output. What is more, productivity is still low (3 237 litres/year on average, 14 000 cows classed as "modern dairy cattle"), and the hygiene conditions in byres are still inadequate (Boussaïd, 2005).

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<sup>8</sup> Olive production in Algeria naturally fluctuates widely from one year to another.

<sup>9</sup> One might suppose that the weight of animals at slaughter increased, but in a less favourable year (as is the case here) animals tend to weigh less.

### 11.5 - The agro-food industries

The Ministry of Small and Medium-Sized Enterprises and Craft Industry (MPMEA) states in its Bulletin no. 6 that there were 226 227 SMEs in 2004 – taking all sectors into account; 99.7% of these businesses were privately owned and 0.3% state-owned<sup>10</sup>; SMEs accounted for 89.2% of jobs, and public enterprises 10.8% (MPMEA, 2005). The AFI sector accounts for 6.1% of this total.

The AFI sector is now largely dominated by the private sector, which accounted for approximately 75% of sectoral value added in 2003 (compared with 71% in 2002). With regard to the number of firms, 13 673 undertakings were registered in the private AFI sector in 2004 so that the sector ranked amongst the seven largest (among the 22 sectors classed by the authors of the study on SMEs) with 6% of the small and medium-sized enterprises registered in the country, coming fifth after the building and civil engineering sector (32%), the wholesale and retail trades and the distribution sector (17%), transport and communications (9%), services provided for households (7.5%) and the hotel and catering trade (6.3%).

In terms of growth, the AFI sector seems to be tailing off: the number of businesses in the sector only increased by 4.7% in 2004, ranking last in the seven major sectors and even below the average of the other sectors (6%).

2004 was marked by the saturation of the grain-mill and semolina product market, which was the result of the overinvestment that has been typical of the sector for the last 10 years. Whereas the bigger milling plants and semolina factories try to find export markets, some of the smaller ones have had to close down.

The privatisation of public agro-food enterprises is now at last beginning to take on concrete form. All of the enterprises in the sector – there are 164 – have been declared privatisable<sup>11</sup>. Several subsidiaries of ERIAD Algiers have been sold to private investors; ERIAD Setif – the first state enterprise to be listed on the stock exchange (in 1999) because of its high performance – was put up for sale in its entirety in 2005 having accumulated considerable deficits in the course of the last three financial years (Benlaïche, 2005). An invitation to tender has also been launched for the privatisation of ERIAD Tiaret as well as enterprises manufacturing beverages and cold storage enterprises (cf. site of the Ministry for Participation and Investment Promotion – MPPI – for the list of enterprises for sale).

Some of the enterprises in the AFI sector receive State aid in the context of an upgrading scheme, which consists of a strategy for accompanying both public and private industrial enterprises with a view to helping the latter to cope with the new

<sup>10</sup> State-owned SMEs, of which there were 778 in 2004, accounted for 60% of public enterprises (approx. 1 300 in 2004).

<sup>11</sup> Cf. web site of the Ministry for Privatisation and Promotion of Industry ([www.mdppi.dz](http://www.mdppi.dz)).

constraints resulting from the opening of markets and the integration of the Algerian economy into the free trade areas established with the EU and, shortly, with States which have joined the WTO. The aim is to promote industrial competitiveness by improving the performance of undertakings through upgrading measures and measures to improve their environment. The upgrading measures concern:

- the modernisation of plant;
- the improvement of organisation, management and production systems;
- productivity gains resulting in control of production costs;
- the development:
  - of training and further training;
  - of quality and certification;
  - of marketing and market research; and
  - of alliances and partnerships.

The upgrading schemes are financed by the EU (Euro-development Programme for SMEs) in the MEDA context, by the French Development Agency and Algeria (Ministry of Industry and Restructuring with UNIDO support). These programmes are encountering difficulties which are relatively difficult to resolve. According to an evaluation by the Ministry of SMEs, "at microeconomic level entrepreneurs are reluctant to concern themselves with the future and with anticipated market developments; they distrust one another and often work alone without any skilled human resources other than their close relatives. They give priority to technology and production and the modernisation of equipment and plant, and they attach much less importance to the aspects of organisation, strategy, human resources management and financial management". However, the main difficulty in upgrading undertakings seems to lie in the difficulty in upgrading the business environment (administrative departments, banks and other credit organisations).

## **11.6 - Foreign trade and the self-supply rate**

Expressed in US dollars, Algerian foreign trade increased considerably in the period under review (+43% between 2003 and 2004), but agricultural foreign trade only increased by 30%. If imports are considered on their own, agro-food imports also grew less rapidly than total imports (30.5% and 34.7% respectively).

### **11.6.1 - Imports**

Algeria's financial ease allowed the country to considerably increased food imports, which rose by 28%, and to increase non-food agricultural imports by 36.7%; the latter concern raw materials (wood) and agricultural inputs (seed, animal feed). The increase in the value of imports was accompanied by an increase in import

volume in the case of the major foodstuffs: this increase was slight in the case of cereals (+0.4%), and larger in the case of milk (19%), oils (11.4%) and sugar (13.9%). In view of the increases in agricultural commodities mentioned above, it would thus seem that the Algerian population was better supplied with foodstuffs than had been the case the previous year.

The international market was not very favourable for Algeria; the prices of the main foodstuffs imported rose appreciably. Whereas the volume of cereal imports only increased by 0.4%, their value increased by almost 21%. The price increases were as follows: durum wheat rose by 7.3%, common wheat by almost 43%, maize by 21.5%, powdered milk by 37%, sunflower oil by 12%, and soybean meal by 33%.

In terms of major economic regions, there was practically no change in the flux of imports in 2004 compared to 2003. The OECD countries continued to supply 50% of imports in terms of value (57% in 2003), and the EU-15 41% (42% in 2003). The NAFTA countries increased their share from 17% in 2003 to 23% in 2004. The share of the CIS and the countries of the Arab League dropped from 7% to 5% and from 4% to 2% respectively.

Broken down by country, France remained the main supplier in 2004 accounting for 18% of the value of Algerian imports (19.3% in 2003), followed by Argentina with 12.2% (5.9% in 2003) and the US with 8% (7.4% in 2003). France is the main supplier of durum wheat (35.5%) and common wheat (43.8%), and the US and Argentina monopolised maize imports accounting for 62% and 37% of their value respectively. Imports are more diversified in the case of powdered milk and AMF<sup>12</sup>: Argentina is in the lead with approximately 17%, followed by France with 16%, Belgium with almost 11%, New Zealand with 10% and Poland with 8%. As regards oil imports, France and Germany come first with 78% and 22% of the quantities imported; Russia and Argentina account for 58% and 20% of the rapeseed oil imported, and Argentina and the US account for 20% and 11% of sunflower oil imports. In the case of raw sugar imports, Brazil is well ahead in terms of quantity with 69%, followed by France with 17%.

### **11.6.2 - Exports**

Agricultural commodity exports continue to account for only a tiny share of total exports (0.6% in 2003 and 0.5% in 2004), even though they grew by 21% in 2004. Likewise, the import-export ratio is still pathetically low (3.8% in 2003 and 3.5% in 2004). If only foodstuffs are taken into account (and non-food agricultural commodities are thus excluded from the calculation), the import-export ratio is even lower (around 2% for the last two years).

The bulk of exported foodstuffs (worth approximately US\$68 million) is composed of dates (28% of the value of foodstuff exports), fisheries products (16%) and wine

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<sup>12</sup> Anhydrous milk fat.

(10%). Although the quantities exported are still small, the exports of all of these products increased considerably in 2004: dates by 14.5%, fisheries products by 67% and wine by 18%.

Export flows changed little in 2004 compared to 2003. The main destinations were France (30% in 2004 compared to 27% in 2003), Spain (18.3% in 2004, which was a slight decrease compared to 21% in 2003) and Italy (10.2% in 2004 as against 10.7% in 2003).

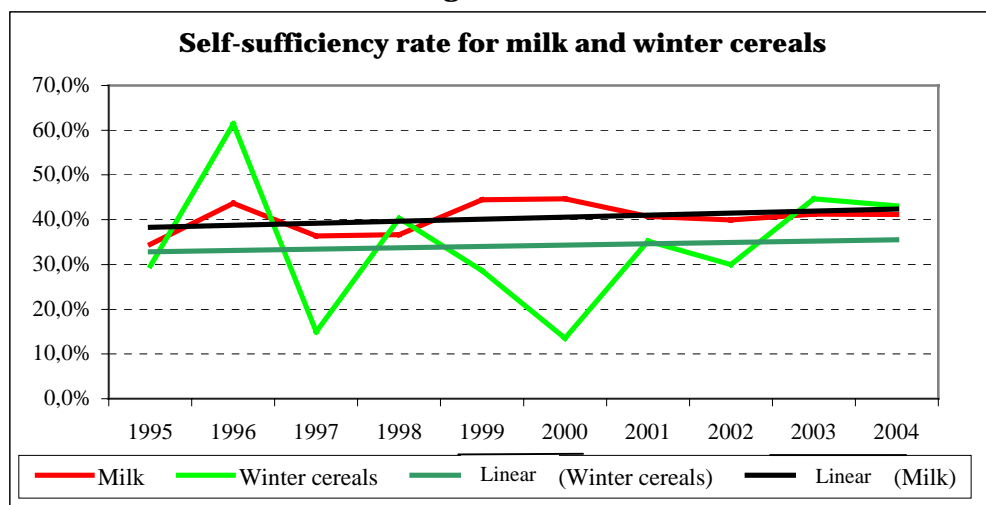
The import-export ratio is still very low even in the case of the countries to which Algeria exports most: 6.4% in the case of France, 9.4% in the case of Spain and 14% in the case of Italy. The import-export ratio was only 7.5% for the EU-25 as a whole.

Exports have been receiving a number of support measures for about 10 years (in particular in the handling and land and maritime transport fields), but the Fund which has to finance this support has never been provisioned consistently. The Finance Act 2005 has just remedied this by making provision for the allocation of 2% of domestic consumer tax to the Special Export Promotion Funds. This will provide DA660 million to boost the Fund's activities.

### ***11.6.3 - The self-supply rate***

The self-supply rate for the major agricultural commodities deteriorated slightly in 2004 compared to 2003. This was the case with durum wheat, common wheat, chickpeas, concentrated tomatoes, garlic, and red meat. However, in relative terms, performance in 2004 was better than that registered for the average of the 1995-2004 period.

The evolution of the self-supply rates for the major foodstuffs shows that the policies that have been pursued in the course of the last 10 years have been unable to significantly reduce the country's dependence on a sustainable basis. The trend lines for the principle commodities are still hopelessly flat (cf. figure below for cereals and milk).

**Figure 11.2**

## 11.7 - The fisheries sector

### 11.7.1 - Infrastructure, plant and equipment, employment and organisation

The number of fishing boats increased slightly in 2004 compared to 2003 – by 3% (108 new units purchased) – although the increase registered the previous year had been much greater: + 14% (412 units). This considerable drop in the number of purchases can be explained by the diminishing number of individuals and firms that are in a position to fulfil the conditions (particularly the financial conditions and guarantees required by banks) in order to be eligible for State subsidisation for the purchase of boats and ships. If the current purchasing rate remains constant it is unlikely that the national plan for developing fisheries and aquaculture in the 2003-2007 period will be accomplished as scheduled. For although the transaction rates are satisfactory in the case of trawlers and sardine boats (purchase of 106 of the 181 trawlers planned and purchase of 100 of the 337 sardine boats planned), this is not the case with small fishing boats (only 4% of the 1 294 purchases planned) and tuna boats (4 purchased out of the 32 purchases planned).

The majority of the ships which were purchased and granted State subsidies were low-powered boats (40 sardine boats and 39 small fishing boats). Only 2 tuna boats and 27 trawlers were actually purchased in the course of 2004. It is to be noted that the fisheries sector is a good client for Algerian shipbuilders, at least in the case of sardine boats and small fishing boats, since 32 of the 40 sardine boats purchased in

2004 were built by Algerian firms and 38 of the 39 small fishing boats were built in Algeria. The tuna boats and trawlers still come from abroad (only one trawler was produced locally). The shipbuilders are mainly Mediterranean (Spanish firms built 16 trawlers, 2 tuna boats, 3 sardine boats and 1 small fishing boat, Turkish firms built 6 trawlers and 4 sardine boats, and Tunisian firms built 3 trawlers).

Fishing infrastructures other than boats are also State-subsidised. In 2004, 18 sets of fishing tackle and equipment for small fishing boats were received, the engines of 8 small fishing boats were renewed, 1 sardine boat was restored, and shipbuilding plant was supplied to ECOREP (State-owned shipbuilding enterprise).

As regards aquaculture infrastructures, 2 shellfish farms were established in 2004, one in Algiers Wilaya and the other in Tipaza Wilaya, (each with 50 tonnes of mussels and oysters), 2 rural fish farms were set up (producing 5 tonnes of freshwater fish in Setif Wilaya), and a freshwater fisheries project was launched in Guelma Wilaya.

The downstream industries in the sector received the following subsidies in 2004: 5 cold chambers, 3 ice factories, 1 analytical laboratory, equipment for a sales point and 5 refrigerated transport vehicles.

Employment in the fisheries sector increased by 10% in 2004 according to the statistics of the Ministry concerned. The available labour force in this field still lacks training, particularly in modern fishing methods.

And finally, as regards organisation, the Finance Act 2005 makes provision for allocating 10% of the product of the license fees paid by foreign-registered ships to obtain a commercial permit to fish the major migrating fish species in Algerian waters to a fund for supporting the activities of the National Chamber of Fisheries and Aquaculture.

### ***11.7.2 - Production, consumption and trade in fisheries products***

The figures collected on production must be viewed with caution (due to the shortcomings of collection methods and means), and care must thus be taken in interpreting the data provided by the Ministry. Having said this, fisheries product output is reported to have dropped slightly in 2004 compared to 2003 (-3%), a decrease which is probably due to unfavourable weather conditions for fishing expeditions during the major part of the year.

Per capita consumption of fisheries products decreased slightly in 2004 due to the downswing in production, the low increase in imports and population growth.

Imports (essentially frozen products) have been increasing sharply in quantity since 2002 - by more than 200% between 2002 and 2003 and continuing to increase in 2004, although the rate was low. Unit import prices also rose sharply in

2004: +50% in the case of tuna, +30% in the case of hake, and +27% in the case of other frozen fish.

The import-export ratio in terms of value was only 44%. Exports consisted mainly of shrimps (74% of export the value) and snails other than sea snails (14%). Spain was the main export destination (81% of the value of exports) due to its geographic proximity.

### ***11.7.3 - The main lines of policy in the fisheries sector***

The objectives of the strategy for developing the fisheries sector as defined by the Ministry of Fisheries and Fisheries Resources (MPRH, 2004) are as follows:

- "to increase production,
- to contribute to food security (with emphasis on the distribution of fisheries products throughout the country),
- to create jobs,
- to promote rural development and regional balance by developing coastal enclaves and stabilising their populations,
- to safeguard biological resources through responsible, rational, economical, professional, ecological and sustainable fishing,
- to promote national and foreign investments, and
- to encourage exports, particularly of high-value-added species".

It will be noted that the objectives of this strategy do not explicitly comprise the need to integrate the fisheries sector into the national economy, although that is a highly desirable objective for a developing country. The financial resources which the State is investing in the development of the sector are liable to provide more jobs for foreign firms than for national firms unless the State implements sufficiently consistent incentives for the latter.

In the context of this strategy the MPRH has, since its inception, been endeavouring to encourage fisheries professionals to practise "responsible fishing". To do so, it commissioned the drafting of a new marine chart of the Algerian coast in 2003-2004 with the collaboration of the Spanish authorities; this chart shows the main possible fishing grounds with forecasts of the yields which could be obtained there. It also provides information on the relief of the continental shelf and bathymetry. The chart has been popularised since 2004-2005 by means of talks and conferences given by Ministry officials in the various coastal wilayas (Mejdoub, 2005).



## **11.8 - Evolution of agricultural and rural development policies**

### ***11.8.1 - Structural policies***

In the structural policy field 2004 was rather a non-event. What had been expected was at least a law on the status and form of management of agricultural land, which is currently governed by Act no. 87-19, which instituted collective farms (EAC) and individual farms (EAI). The land involved was to be placed under the leasehold system to enable private investors to join in the capital subscription with the consent of the persons currently farming the land (cf. 2004 and 2005 CIHEAM report).

### ***11.8.2 - Rural development policies***

Rural development policies focus mainly on developing employment in rural areas and improving living conditions.

The action carried out in this field generally concerned monitoring the implementation of pilot Decentralised Rural Development Projects (PPDR) (Minister of State for Rural Development, 2005). Of the 1 227 projects which have been launched, and which target 88 000 households, 435 have been completed; they include:

- 194 decentralised rural development projects (PPDR) in 25 wilayas;
- 241 decentralised projects for combating desertification (PPLCD) in 20 wilayas.

With regard to employment, one of the principal policies aims to expand irrigated areas, which provide many more jobs per hectare than do rain-fed areas. The total irrigated area increased by almost 10% in 2004 from 722 300 ha in 2003 to 793 300 ha in 2004 (+71 000 ha!) – an exceptional rate of increase, which had never been achieved since independence. It is reported that the irrigated area had increased by almost 127% (+443 300 ha) since just before the National Agricultural Development Plan was launched in 2000, growing from 350 000 ha in 1999 to 793 337 ha in 2004.

A specific rural development policy is implemented by the "programme for developing land through leasehold", which is financed by the National Fund for Developing Land by Leasehold (FNMVTC). Under this programme, the State develops areas of agricultural land which is lying fallow or which is not farmed to any great extent or is badly farmed – generally belonging to the public domain but not exclusively – and to lease them to farmers who have no or not enough land. The development schemes consist mainly of sinking tube wells and providing irrigation equipment, measures to improve land, the planting of fruit trees, electrification measures, the planting of windbreaks, the construction of approach tracks to the

new farmers, and so on. In pastoral zones the development measures often consist of planting fodder shrubs and deferring grazing on rangelands. Over 324 000 ha of land are reported to have been developed under this programme since 1999 and distributed to some 24 000 leaseholders. The developed land is mainly in steppe zones (60%) and mountainous zones (37%); 3% of the developed land is in the Sahara. The farms that have been created are relatively large, particularly those which are irrigated – with an average acreage of 11 ha, a fact which is rather paradoxical for land intended mainly for poor populations. In the south of the country (the Sahara), the area allocated to each leasehold is much smaller (2.6 ha), which means that it has been possible to give land to a larger number of landless peasants.

Apart from the above programme, one of the main policies targeting poor rural areas led to the signing of a 95 million US dollar loan with the World Bank at the end of 2003 for running what is called a "rural employment" project. This project is the continuation of a similar project which was coming to an end and had covered mountainous regions in the seven wilayas in the west of the country (Tlemcen, Sidi Bel Abbès, Aïn Temouchent, Mascara, Mostaganem, Relizane and Oran) and had received a loan of US\$ 89 million. Both projects aim to create employment and improve the incomes of mountain farmers while at the same time fighting erosion and developing the watersheds of the major dams. The second project, the "rural employment" project, was not launched until the end of 2004 (more than a year after the signing of the loan agreement) due to the lengthy procedures imposed both by the Bank and by the Algerian regulations.

In addition to these measures, several others promoted rural employment in 2004, although they did not specifically target the rural sector.

Analysis of the steppe zones has shown that unemployment and underemployment are the major factors explaining rangeland degradation. In order to stimulate job creation in these zones, the High Plateaus – where the greater part of the grassland ranges threatened with desertification are located – now benefit from a special economic development fund as the result of the Finance Act 2004. This fund, which is provisioned with an allocation from the State budget of 3% of oil taxes and is under the authority of the Ministry of Finance, will finance all or part of the infrastructural development schemes and projects and will support "productive" investments in the region.

Again in order to promote job creation, the Finance Act 2004 provides that small and medium-sized enterprises which are established and produce in the wilayas in the south of the country and on the High Plateaus and which are eligible for support from the special fund for developing the wilayas in the "Deep South" and from the special fund for the economic development of the High Plateaus will be granted a 15% and 20% reduction of the company profit tax due on the production of goods and services in the case of activities carried out in the wilayas of the High

Plateaus and of the “Deep South” respectively. The same Finance Act grants exemption from registration fees for deeds on transactions concerning agricultural land or land of agricultural value and deeds of transfer between joint owners concerning the same categories of land. These two cases of exoneration aim to promote reparcelling and the constitution of sole proprietorship instead of joint ownership which is an obstacle to investment in agriculture.

As regards the rural housing sector, the Finance Act 2004 (Section 50) also endeavours to promote rural housing by exonerating the profits made on activities promoting such housing from tax on total income and company profit tax.

And finally, at the organisational level, rural development has now had a strategy since 2004 – which has not yet been officially adopted by the government but which is widely publicised and explained to all of the parties involved – and a whole range of guidelines and implementation procedures. The national strategy for sustainable rural development is the first document in the post-socialist Algeria which proposes an overall and coherent vision of the rural world in its relationship with agriculture and – to a greater or lesser extent – with the agro-support and downstream industries. A shortcoming of this document, however, is that it fails to take account of the other activities necessary to rural development, in particular industrial activities. For agriculture and the agro-support and downstream activities cannot alone suffice to produce a sustainable form of rural development which complements and is in harmony with overall development.

However, in addition to setting targets in precise figures, the document deserves credit for being based on relatively comprehensive studies of poorer rural areas and an analysis of past experience – even if these studies have in some cases being conducted rather hastily and lack full documentation. The strategy actually aims first and foremost to improve the living and working conditions of population segments which until now have been more or less excluded from the development process in the country. These population groups are located – but not exclusively – in the mountainous regions in the north of the country, in the steppe zones and in certain regions in the south. On the basis of an exhaustive census of the poorest municipalities, the strategy proposes that 10 500 decentralised rural development projects be run in the 10-year period from 2005 to 2015 concerning small isolated human settlements; 2 500 of these projects would aim to “revive economic and social activities in the Ksours and in rural towns and villages”, 2 150 would focus on combating desertification (mainly in the steppe zones), and 1 000 would aim to create farms on marginal but developed State lands which would be leased to the rural poor. Furthermore, an unspecified number of decentralised projects are planned for developing and managing approximately 1 million ha of dam watersheds in the period from 2005 to 2015. As for agricultural development per se, the strategy makes provision for running 350 000 projects in the same number of farms covering approximately 3.6 million ha (of the 8.3 million forming the AAU of the country). With these projects, the areas irrigated by water-saving techniques

could be expanded from 120 000 to 400 000 ha, strategic crops could be intensified on 500 000 ha per annum, fruit plantations could be increased by 50 000 ha per annum, export crops (early fruit and vegetables and organic products) could be increased, and the number of high-potential dairy cows could be increased by a headage of 150 000 ...In the employment field, the plan is to create 1.8 million jobs in the period from 2005 to 2015, 40% of which would be obtained through projects for upgrading farms and projects for promoting young investors and developing subsectors, 40% through decentralised rural development projects and projects for developing land through leasehold, and 20% through projects aiming to protect natural resources (PPLCD and PPABV). These results are to be obtained through a State budget effort which does not seem out of proportion: according to our calculations, the annual expenditure for the period involved would only amount to 1.6 times the annual expenditure actually recorded in the course of the 2000-2004 period. This is a considerable effort but one that is quite feasible. It is at all events essential if the nation is to help the poorest rural areas out of their current virtual exclusion.

### ***11.8.3 - Investment, price and subsidisation policies***

Investments in agriculture (excluding investments in irrigated areas) dropped by 14.1% in 2004 compared to 2003; this decrease affected mainly the subsidisation of farmer investments financed through the National Fund for Agricultural Development (FNRDA). The expenditure of the Fund for Rural Development and the Development of Land through Leasehold (FDRMVTC) – which finances the development of land for creating new farms – also decreased considerably. These decreases in the expenditure of the FNRDA and the FDRMVTC are no doubt to be explained by the public authorities' intention to be more stringent in the selection and preparation of the projects to be subsidised. For many projects were apparently financed in the 2000-2003 period without adequate prior assessment, and this led to quite considerable wastage of resources (unsuccessful drilling, delays in development work due to project re-assessment, the lack of firms for implementing the projects or the low level of skills of firms, the difficulty in obtaining cooperation on the part of the future beneficiaries of the developed land, etc.).

With regard to prices, policy in this field has no longer played a role in agricultural policies for quite some time, except as far as price support for the production of (durum and common) wheat and cow's milk is concerned. The farm gate prices for wheat – reference prices fixed by the State for the quantities delivered to the Algerian Interprofessional Agency for Cereals (OAIC) – have not changed since 1995. The subsidy is constituted by the difference between the average import price registered by the OAIC and the reference prices fixed by decree.

In the subsidisation field, the State has been giving precedence since 1995 to subsidies for purchasing farm equipment, particularly for dairy farming, irrigation and fruit-tree plantations as well as subsidies for the intensification of certain crops

(wheat, potatoes, forage for dairy cattle). With the implementation of the National Agricultural Development Plan the subsidies have concerned a larger number of fields and measures since 2000; they are financed by two main Funds: the FNRDAR and the FDRMVTCT. Farm income support subsidies amount to very little compared to investment subsidies (3.5% in 2004), although they can increase sharply in the event of a good harvest at the national level and a simultaneous drop in prices on the world market. These subsidies decreased in 2004 compared to 2003 due to harvest fluctuation (compared to the previous year) and the high price of imported durum wheat.

At the end of 2004 the government decided to change the subsidisation rates for certain equipment and certain measures either by simply doing away with the subsidy altogether or by reducing the rates practised hitherto. According to the policymakers, this modification of subsidisation policy is justified on the one hand by the fact that the State lacks resources and on the other hand by the fact that saturation point has been reached in the case of certain equipment such as cold storage capacities. These arguments are far from valid, however, for Algeria has never been so well-off financially as it is at the present time (cf. the foreign exchange reserves described above). Furthermore, although some reductions are justified by the fact that the former rates were frankly exaggerated<sup>13</sup>, many of the cases where a subsidy has been reduced or done away with run counter to the important objectives of agricultural policy. This is true, for example, in the case of subsidies concerning drilling, wells, irrigation plant – particularly spray and linear move sprinkler systems –, tillage for cereals, pulses and fodder, olive production, wine growing, phoenix date palm growing, dairy equipment for farmers, the construction of dairies, poultry farming, bee-keeping, and plant for processing agricultural commodities (conditioning, cold storage, etc.). Yet cold storage capacities – of which there is reportedly a surplus – are sorely lacking in certain regions. The subsidy restrictions are even less understandable when one considers that the country devotes only a tiny share of its public finance to subsidisation compared to what developed countries devote to their agricultural sectors: according to our calculations, total expenditure on agriculture in 2004<sup>14</sup> amounted to only 9.1% of the GAP (which, moreover, is highly underestimated by the national accountants) and less than 1% of GDP (0.84%)!

And finally, it is to be noted in the field of indirect subsidies that the Finance Act 2005 now grants VAT exemption for all transactions concerning camelids with a view to reducing the cost of raising these animals, which constitute a major part of animal husbandry in the Sahara zones.

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<sup>13</sup> A standard reservoir was subsidised at DA250 000, for example, whereas it was a well-known fact that it did not cost more than DA100 000; the difference was pocketed by the entrepreneur, the farmer receiving the subsidy and the public official in charge of monitoring the installation work and signing to certify that the firm had duly provided the service.

<sup>14</sup> Public amenities budget + support Funds (FNRDA, FNMVTC, FPPDLS, etc.) + the irrigation infrastructure expenditure of the Irrigation and Drainage Agency (which is under the authority of the Ministry of Water Resources).

#### **11.8.4 - The 2005-2009 5-year plan**

The government's ambitious second economic recovery plan has a budget of DA4 202.7 billion (approximately US\$50 billion) for the 5-year period from 2005 to 2009. This plan devotes some 300 billion dinars (7.1% of the total amount) to supporting agriculture and rural development. However, since this sum amounts to 89% of the support for economic development in the various sectors, agriculture can be considered to be relatively "favoured" compared to the other economic sectors. The agricultural sector and rural development also receive a certain amount from other programmes such as the housing scheme, to which 555 billion to be allocated (13.2% of the resources of the 5-year plan), municipal development programmes, programmes concerning national education, vocational training, vocational training, public health, water supply, electrification, etc.

With regard to the fisheries sector, approximately DA12 billion are to be devoted to supporting corporate investment and expenditure on plant for the administration of fisheries and fisheries resources, excluding the port infrastructures covered in the programmes of the transport and public works sectors.

#### **11.9 - Agriculture, natural resources and the environment**

The efforts to fight desertification are carried out mainly on the grassland ranges most threatened by the phenomenon. The methods employed – by the High Commission for Steppe Development and the departments of the Directorate General for Forestland – are classical: deferral of grazing, tree and fodder shrub plantations.

The Directorate General for Forestland (DGF) is the principal institution involved in combating desertification<sup>15</sup>. Its 2003-2004 balance sheet shows a decrease in planted acreage (-14%), affecting fruit plantations in particular (-36%). The drop in the fruit-tree plantation rate since 2001 has been accompanied by an increase in the forest plantation rate. Does this mean that the policy launched in 2001, which consisted – for the forestry departments – in systematically promoting fruit trees at the expense of forest trees, is being called in question? If this is the case, it would be a great pity for the rural populations which benefit from these fruit tree plantations and which rightly consider that forest tree plantations do not help them to make a better living as rapidly and consistently as do fruit tree plantations. For riparian populations have many times expressed their surprise to see the State spend so many resources on Aleppo pine or stone pine plantations, whereas Algeria is still

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<sup>15</sup> Together with the High Commission for Steppe Development it absorbs the bulk of the public amenities budget of the Ministry of Agriculture and Rural Development. Furthermore, the DG for Forestry is the focal point of the national programme for combating desertification, which was set up in the context of the Convention to Combat Desertification.

far from self-sufficient in the produce of rain-fed tree farming (almond trees, pistachio trees, olive trees, walnut trees, pecan trees, etc.).

It makes sense to make maintenance the main line of policy in the forestry sector; it should take precedence over the creation of new forest tree plantations. For if Algeria could maintain its current forest area in good condition this would already be an excellent result from the point of view of medium and long-term forestry policy. But the number of projects in this field dropped in 2004 compared to 2003: by 30% in the case of forestry work, by 51% in the case of work to clear new tracks, by 33% in the case of the development of forest tracks, and by 76% in the case of the rehabilitation of benches. Forest plantations, on the other hand, have increased by 18%.

With regard to water policy, Algeria has planned to establish 10 seawater desalting plants by 2009 with a view to putting an end to the shortage of drinking water in the country; these plants will be able to produce almost 2 million cubic metres per day. The American firm of GE Ionics has signed a building-operating-transfer contract and is currently building a plant with a capacity of 200 000 m<sup>3</sup>/day for the city of Algiers; it will hold 70% of the capital invested in this plant<sup>16</sup>.

In the environment policy field, agriculture is concerned in a measure that has been taken to eradicate the plastic bags which are used – inter alia – for packaging agricultural products sold mainly in the retail trade. The Finance Act 2004 has actually introduced a tax of DA10,5/kg on this product, whether it is imported or produced locally; the tax is paid into the National Fund for the Environment and Depollution. Furthermore, the black plastic bags which disfigure the countryside when dispersed by the wind have been banned from use by regulations laid down in 2005.

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<sup>16</sup> *Oran Daily* newspaper of 26-6-2005.

## Appended tables

**Table 11.1 - Algeria - evolution of the major aggregates  
(value in billion DA)**

	2002			2003			2004		
		Growth rate			Growth rate			Growth rate	
	Value	Vol.	Price	Value	Vol.	Price	Value	Vol.	Price
<b>GDP</b>	4537.9	4.8	1.7	5264.2	6.9	8.5	6112.6	5.2	10.4
G&S imports	1159.1	19.5	4.2	1250.7	2.4	5.4	1549.8	11.6	11.1
● Goods	1001.0	21.4	4.2	1093.9	3.7	5.4	1366.5	11.9	11.6
● Services	158.1	9.1	4.2	156.8	-5.9	5.4	183.3	9.2	7.1
G&S exports	1605.8	5.4	-1.8	2019.8	7.9	16.6	2468.1	3.8	17.7
● Hydrocarbons	1444.2	3.4	-2.6	1856.4	9.2	17.7	2272.8	3.1	18.7
● Other	58.3	30.3	6.5	54.5	-11.3	5.4	60.3	4.4	6.0
● Services	103.3	29.4	5.2	108.9	0.0	5.4	135.0	15.2	7.6
<b>Gross domestic expenditure</b>	4091.2	8.2	3.8	4495.1	5.3	4.4	5194.3	7.6	7.4
Final consumption	2688.5	4.2	4.3	2902.7	4.0	3.8	3235.8	5.4	5.7
● Households	1988.1	3.8	3.7	2125.0	4.0	2.8	2350.7	5.8	4.5
● Public admin.	700.4	5.5	6.3	777.5	4.2	6.5	885.6	4.5	9.0
Accumulation	1402.7			1506.2			1958.7		
● GFAA	1111.3	7.6	7.0	1265.2	5.7	7.7	1458.0	8.1	6.6
● Var. stock	291.4			327.4			500.7		
<b>Sectoral VA</b>									
● Agriculture	417.2	-1.3	2.6	510.0	19.7	2.1	561.0	3.1	6.7
● Hydrocarbons	1477.0	3.7	-1.4	1873.2	8.8	16.6	2319.1	3.3	19.8
● Industry	325.8	2.9	1.3	344.9	1.4	4.3	369.8	2.6	4.5
● Building and civil engineering	409.9	8.2	5.6	446.6	5.5	3.3	506.4	8.0	5.0
● Services	1031.0	5.3	2.2	1133.2	4.2	5.5	1282.1	7.7	5.1
● CD & VAT	377.5	16.7	6.8	403.1	2.3	4.4	439.3	10.2	-1.1
GDP excl. hydrocarbons	2561.4	5.7	3.3	2709.9	6.2	3.1	3158.7	11.7	4.4
GDP excl. hyd. & excl. agr.	2144.2	7.2	3.5	2213.6	4.0	3.4	2597.7	13.0	3.9
Services of public administrations	499.5	3.0	2.6	553.2	4.5	6.0	634.8	4.0	10.3
GDP	4537.9	4.8	1.7	5264.2	6.9	8.5	6112.6	5.2	10.4
GDP excl. hyd.	3060.9	5.3	3.2	3391.0	6.0	4.5	3793.5	6.2	5.3
GDP excl. hyd. & excl. agr.	2643.7	6.4	3.3	2881.0	3.8	5.0	3232.4	6.8	5.1
GDP excl. agr.	4120.7	5.4	1.6	4754.2	5.6	9.2	5551.5	5.4	10.8

Source : Ministry of State for the Plan.



**Table 11.2 – Employed population and unemployment**

	Urban	Rural	Total	Urban %	Rural %	Total
Current employment	4 548 045	3 250 367	7 798 412	58.3	41.7	100.0
- <i>Employers- self-employed</i>	1 428 099	1 043 706	2 471 805	57.8	42.2	100.0
- <i>Permanent employees</i>	1 975 505	926 860	2 902 365	68.1	31.9	100.0
- <i>Non-perm. employees + apprentices + other</i>	918 474	866 167	1 784 641	51.5	48.5	100.0
- <i>Family workers</i>	225 967	413 634	639 601	35.3	64.7	100.0
Unemployed population	994 371	677 163	1 671 534	59.5	40.5	100.0
Current working population	5 542 416	3 927 530	9 469 946	58.5	41.5	100.0
Unemployment rate in %	17.9	17.2	17.7			

**Table 11.3 – Distribution of employment according to the sector of activity of the establishment and stratum (September 2004)**

	September 2003		
	Urban	Rural	Total
Current employment	3 886 288	2 797 768	6 684 056
- Employers - Self-employed	1 021 955	833 406	1 855 361
- Permanent employees	1 932 588	896 609	2 829 197
- Seasonal workers + apprentices + others	772 067	743 375	1 515 442
- Family workers	159 678	324 378	484 056
Unemployed population	1 223 119	855 151	2 078 270
Current working population	5 109 407	3 652 918	8 762 325
Unemployment rate %	23.9	23.4	23.7

	September 2004					
	Urban	Rural	Total	Urb.	Rur.	Total
Current employment	4 548 045	3 250 367	7 798 412	58.3	41.7	100.0
- Employers- Self-employed	1 428 099	1 043 706	2 471 805	57.8	42.2	100.0
- Permanent employees	1 975 505	926 860	2 902 365	68.1	31.9	100.0
- Seasonal workers + apprentices + others	918 474	866 167	1 784 641	51.5	48.5	100.0
- Family workers	225 967	413 634	639 601	35.3	64.7	100.0
Unemployed population	994 371	677 163	1 671 534	59.5	40.5	100.0
Current working population	5 542 416	3 927 530	9 469 946	58.5	41.5	100.0
Unemployment rate %	17.9	17.2	17.7			

	Variation 2003/2004 in %		
	Urban	Rural	Total
Current employment	17.0	16.2	16.7
- Employers- self-employed	39.7	25.2	33.2
- Permanent employees	2.2	3.4	2.6
- Seasonal workers + apprentices + others	19.0	16.5	17.8
- Family workers	41.5	27.5	32.1
Unemployed population	-18.7	-20.8	-19.6
Current working population	8.5	7.5	8.1
Unemployment rate %			

Source: National Statistical Office.

**Table 11.4 - Employment by sector**

	<b>September 2003</b>		
	<b>Urban</b>	<b>Rural</b>	<b>Total</b>
Agriculture	307 150	1 105 191	1 412 341
Industry	593 615	210 538	804 153
Building and civil engineering	410 139	389 775	799 914
Wholesale + retail trade and services	2 575 385	1 092 265	3 667 650
<b>Total</b>	<b>3 886 289</b>	<b>2 797 769</b>	<b>6 684 058</b>

	<b>September 2004</b>					
	<b>Urban</b>	<b>Rural</b>	<b>Total</b>	<b>Urban</b>	<b>Rural</b>	<b>Total</b>
Agriculture	364 466	1 252 659	1 617 125	22.5	77.5	100.0
Industry	769 106	291 679	1 060 785	72.5	27.5	100.0
Building and civil engineering	517 702	449 866	967 568	53.5	46.5	100.0
Wholesale + retail trade and services	2 896 770	1 256 164	4 152 934	69.8	30.2	100.0
<b>Total</b>	<b>4 548 044</b>	<b>3 250 368</b>	<b>7 798 412</b>	<b>58.3</b>	<b>41.7</b>	<b>100.0</b>

	<b>Var. 2003/2004 in %</b>		
	<b>Urban</b>	<b>Rural</b>	<b>Total</b>
Agriculture	18.7	13.3	14.5
Industry	29.6	38.5	31.9
Building and civil engineering	26.2	15.4	21.0
Wholesale + retail trade and services	12.5	15.0	13.2
<b>Total</b>	<b>17.0</b>	<b>16.2</b>	<b>16.7</b>

**Table 11.5 – Agro-food imports and exports**

	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>
Total imports comprising:	100	100	100	100
• agricultural commodities	30.4	28.9	26.3	25.5
• foodstuffs	22.1	20.9	19.2	18.3
• non-food products	8.3	7.9	7.1	7.2
Total exports comprising:	100.0	100.0	100.0	100.0
• agricultural commodities	0.8	0.7	0.6	0.5
• foodstuffs	0.1	0.2	0.2	0.2
• non-food products	0.2	0.5	0.4	0.3

**Table 11.6 - Evolution of foreign trade  
(imports rounded up to the nearest million US\$)**

	2001	2002	2003	2004	Average 2001- 2004	Var. 2004/ av. 2001- 2004	Var. 2004/ 2003	% 2004
<b>Total Algerian imports comprising:</b>	9940	11969	13533	18232	13418	35.9	34.7	
<b>Agricultural commodities (1+2)</b>	3024	3 455	3 561	4 646	3 671	26.6	30.5	100
<b>1. Foodstuffs</b>	2197	2 506	2 601	3 334	2 660	25.4	28.2	71.8
● Consumer cereals	734	973	898	1 052	914	15.1	17.1	22.6
● Milk and milk products	530	488	514	818	587	39.2	59.1	17.6
● Oils and fats	235	276	342	378	308	22.7	10.4	8.1
● Sugars and sugar confectionery	298	268	230	270	266	1.3	17.3	5.8
● Grain-mill products	23	13	12	28	19	46.6	127.9	0.6
● Coffee, tea, spices	84	83	111	128	101	26.0	14.7	2.8
● Fresh vegetables and pulses	104	87	94	98	96	1.9	3.6	2.1
● Other foodstuffs	189	317	398	563	367	53.5	41.6	12.1
<b>2. Non-food products</b>	827	948	960	1 312	1 012	29.7	36.7	28.2
● Seed cereals and animal feed	256	306	225	304	273	11.6	35.4	6.6
● Wood	209	231	304	339	271	25.1	11.4	7.3
● Crop clippings and animal feed	108	111	118	209	137	53.1	77.6	4.5
● Seed pulses	28	73	54	61	54	12.8	12.8	1.3
● Livestock	8	9	29	83	32	158.3	188.7	1.8
● Other non-food products	218	218	230	316	245	28.6	37.0	6.8
<b>Total Algerian exports</b>	19133	18420	21479	31713	22686	39.8	47.6	
<b>Agricultural commodities (1+2)</b>	151.85	126.92	134.73	163.11	144.15	13.2	21.1	100
<b>1. Foodstuffs</b>	28.40	43.64	51.50	68.01	47.89	42.0	32.1	41.7
● Fresh vegetables and pulses	10.50	16.53	16.55	18.95	15.63	21.3	14.5	11.6
● Wine and beverages	3.50	6.14	6.02	7.13	5.70	25.1	18.4	4.4
● Canned fruit and vegetables	0.60	0.59	0.40	0.71	0.57	22.9	77.5	0.4
● Fisheries products	5.30	5.71	6.58	11.01	7.15	54.0	67.3	6.7
● Milk and milk products	0.00	0.41	5.39	5.85	2.91	100.9	8.6	3.6
● Various preparations	0.00	0.05	0.67	1.00	0.43	131.8	47.9	0.6
● Other foodstuffs	8.50	14.21	15.90	6.86	11.37	-39.6	-56.8	4.2
<b>2. Non-food products</b>	39.10	83.29	83.23	95.10	75.18	26.5	14.3	58.3
● Hides and leathers	25.00	23.10	19.65	13.96	20.43	-31.7	-28.9	8.6
● Cork	14.10	6.67	9.75	12.83	10.84	18.4	31.6	7.9

Source : MADR-DSASI (Directorate for Agricultural Statistics and Economic Studies).

**Table 11.7 - Evolution of agricultural commodities in 2004**

Groups of products	%	Output (1000 ql)				Index			Growth rate 2004 /03
		86-95	2002	2003	2004	2002	2003	2004	
Durum wheat	8	8 530	9 510	18 023	20 017	111	211	235	11
Common wheat	3	3 327	5 508	11 626	7 290	166	349	219	-37
Barley	4	8 351	4 161	12 220	12 116	50	146	145	-1
Oats	0	604	335	775	890	55	128	147	15
<b>Cereals</b>	<b>16</b>	<b>20 812</b>	<b>19 514</b>	<b>42 644</b>	<b>40 313</b>	<b>104</b>	<b>219</b>	<b>206</b>	<b>-6</b>
Fodder	3	9 254	6 335	12 846	19 050	68	139	206	48
Pulses	1	507	435	577	580	86	114	114	0
Industrial tomatoes	1	2 867	4 136	4 302	5 801	144	150	202	35
Tobacco	0	42	59	57	76	140	135	181	34
Horticulture	12	27 090	38 374	49 089	54 800	142	181	202	12
Wine growing	2	1 751	2 344	2 780	2 839	134	159	162	2
Citrus	2	3 112	5 195	5 599	6 090	167	180	196	9
Kernels and pips	5	3 012	5 638	6 339	6 840	187	210	227	8
Olives	1	1 643	1 919	1 676	4 688	117	102	285	180
Dates	5	2 359	4 184	4 922	4 426	177	209	188	-10
<b>Crop production</b>	<b>48</b>					<b>133</b>	<b>193</b>	<b>203</b>	<b>5</b>
Cattle (Growth in 1000 head)	13	487	596	664	669	122	136	137	1
Sheep (Growth in 1000 head)	15	7 970	7 559	9 579	10 007	95	120	126	4
Goats (Growth in 1000 head)	2	1 627	1 484	2 119	2 250	91	130	138	6
White meat (1000Qx)	5	2 127	1 506	1 568	1 700	71	74	80	8
<b>Animal farms</b>	<b>35</b>					<b>101</b>	<b>120</b>	<b>124</b>	<b>3</b>
Milk (10 <sup>6</sup> litres)	11	1 027	1 544	1 610	1 915	150	157	186	19
Eggs (10 <sup>6</sup> units)	6	2 503	3 220	3 302	3 500	129	132	140	6
Honey	0	15	20	21	28	133	140	187	33
Wool	1	195	197	200	230	101	103	118	15
<b>Animal products</b>	<b>17</b>					<b>141</b>	<b>147</b>	<b>169</b>	<b>15</b>
<b>Animal production</b>	<b>52</b>					<b>114</b>	<b>129</b>	<b>139</b>	<b>8</b>
<b>Total agricultural production</b>	<b>100</b>					<b>123</b>	<b>159</b>	<b>169</b>	<b>6</b>

Source: MADR-DSASL.

**Table 11.8 – Cereals output (quintals) and yield (quintals)**

<b>Crops</b>	<b>1999-2000</b>	<b>2000 – 2001</b>	<b>2001-2002</b>	<b>2002-2003</b>	<b>2003-2004</b>
<b>Distribution of output by species (quintals)</b>					
Durum wheat	4 863 340	12 388 650	9 509 670	18 022 930	20 017 000
Common wheat	2 740 270	8 003 480	5 508 360	11 625 590	7 290 000
Barley	1 632 870	5 746 540	4 161 120	12 219 760	12 116 000
Oats	81 700	436 610	334 950	775 460	890 000
<b>TOTAL</b>	<b>9 318 180</b>	<b>26 575 280</b>	<b>19 514 100</b>	<b>42 643 740</b>	<b>40 313 000</b>
<b>Yields by species (ql/ha) (in terms of harvested acreage)</b>					
Durum wheat	8.9	11.1	11.7	14.2	15.3
Common wheat	9.7	11.1	9.4	14.9	10.4
Barley	7.6	11.1	10.4	15.6	13.2
Oats	5.6	8.8	7.5	10.9	12.0
<b>TOTAL</b>	<b>8.8</b>	<b>11.1</b>	<b>10.6</b>	<b>14.7</b>	<b>13.4</b>
<b>Yield by species (ql/ha) (in terms of grain-sown acreage)</b>					
Durum wheat	3.3	8.7	7	13.6	14.6
Common wheat	3.2	9.6	6.8	14.3	9.0
Barley	1.5	6.6	4.6	14.7	11.8
Oats	1.2	7.4	4.7	10.0	11.0
<b>TOTAL</b>	<b>2.7</b>	<b>8.3</b>	<b>6.2</b>	<b>14.0</b>	<b>12.3</b>

<b>Crops</b>	<b>Growth 2004/2003</b>	<b>Average 1991 to 2000</b>		<b>Growth 2004/ (average 91-2000)</b>
	<b>%</b>	<b>Quintals</b>	<b>%</b>	<b>%</b>
<b>Distribution of output by species (quintals)</b>				
Durum wheat	11	10 560 001	45	90
Common wheat	-37	4 529 108	19	61
Barley	-1	7 799 394	33	55
Oats	15	543 740	2	64
<b>TOTAL</b>	<b>-5</b>	<b>23 432 243</b>	<b>100</b>	<b>72</b>
<b>Yield by species (ql/ha) (in terms of harvested acreage)</b>				
Durum wheat	8	9.8	36	56
Common wheat	-30	9.8	42	6
Barley	-15	9.6	4	38
Oats	10	8.2	1	46
<b>TOTAL</b>	<b>-9</b>	<b>9.7</b>	<b>100</b>	<b>38</b>
<b>Yield by species (ql/ha) (in terms of grain-sown acreage)</b>				
Durum wheat	7	6.7		118
Common wheat	-37	6.4		41
Barley	-20	5.7		107
Oats	10	4.7		134
<b>TOTAL</b>	<b>-12</b>	<b>6.2</b>		<b>98</b>

Source : MADR-DSASI.

**Table 11.9 – Acreage, output and yield of artificial and natural fodder**

Crop	2000-2001	2001-2002	2002-2003	2003-2004	Growth 2004/ 2003	Average 1991 to 2000	Growth 2004/ (91-2000)
					%	ha	%
Artificial fodder							
Acreage (ha)	243 520	300 280	272 790	461 589	69.2	359 943	28.2
Output (t)	5 544 460	4 901 790	7 914 890	15 551 250	96.5	6 017 700	158.4
Yield (t/ha)	22.8	16.3	29.0	33.7	16.1	16.7	101.5
Natural fodder							
Acreage (ha)	142 690	101 030	299 020	175 634	-41.3	149 249	17.7
Output (t)	2 535 540	1 433 260	4 930 880	3 498 750	-29.0	2 104 594	66.2
Yield (t/ha)	17.8	14.2	16.5	19.9	20.6	14.1	41.1
Total fodder (artificial and natural)							
Acreage (ha)	386 210	401 310	571 810	637 223	11.4	509 192	25.1
Output (t)	8 080 000	6 335 050	12 845 770	19 050 000	48.3	8 122 294	134.5
Yield (t/ha)	20.9	15.8	22.5	29.9	33.1	16.0	87.4

Source: MADR-DSASI.

**Table 11.10 – Horticultural output (quintals)**

	2000-2001	2001 - 2002	2002-2003	2003-2004	Average	Variation	
					1991-2000	2004/2003	2004/(av. 91-2000)
<b>Real acreage</b> (ha)	268 760	270 490	298 280	317 608	263 887	6.5	20.4
<b>Planted acreage</b> (ha)	277 400	290 690	320 100	345 558	289 463	8.0	19.4
<b>Output</b> (ql)	33 622 030	38 374 160	49 088 610	54 800 000	30 804 100	11.6	77.9
<b>Yield</b> (t/ha)	121.2	132.0	153.4	158.6	106.4	3.4	49.0

Source : MADR-DSASI.

**Table 11.11 – Potato output (quintals)**

	2000-2001	2001-2002	2002-2003	2003-2004	Average 91-2000	Variation in %	
						2004/2003	2004/(91-2000)
<b>Acreage</b>	65 790	72 560	88 660	93 144	84 362	5.1	10.4
<b>Output</b>	9 672 320	13 334 650	18 799 180	18 962 700	10 617 510	0.9	78.6
<b>Yield</b>	147	184	197	203.6	126	3.4	61.6

Source : MADR-DSASI.

**Table 11.12 – Industrial crop output**

	2000-2001	2001-2002	2002-2003	2003-2004	Average 1991-2000	Variation in %	
						2004-2003	2004 / (1991-2000)
Industrial tomatoes							
Acreage (ha)	23 070	24 690	27 080	27 307	28 024	0.8	-2.6
Output (ql)	4 569 970	4 135 770	4 301 640	5 800 780	4 362 664	34.9	33.0
Yield (ql/ha)	198.1	167.5	158.8	212.4	155.7	33.7	36.5
Tobacco							
Acreage (ha)	6 300	5410	5 360	5 498	4 932	2.6	11.5
Output (ql)	77 760	58470	56 740	76 000	54 524	33.9	39.4
Yield (ql/ha)	12.3	10.8	10.6	13.8	11.1	30.6	25.0
Ground nuts							
Acreage (ha)	4 250	3750	3 380	4 081	2 943	20.7	38.7
Output (ql)	46 210	46 160	38 420	42 690	33 539	11.1	27.3
Yield (ql/ha)	10.9	12.3	11.4	10.5	11.4	-8.0	-8.2

Source : MADR-DSASI.

**Table 11.13 – Fruit-tree crop, citrus and vine output (quintals)**

	2000-2001	2001-2002	2002-2003	2003-2004	Average 1991-2000	Variation in %	
						2004/2003	2004/(91-2000)
Fruit-tree crops							
Co-planted acreage	179 640	212 900	250 490	281 490	153 248	12.4	45.6
Acreage bearing fruit (ha)	135 690	141 260	155 330	166 322	129 312	7.1	22.3
Output (ql)	4 684 480	5 638 430	6 339 250	6 840 000	3 728 106	7.9	45.5
Yield (ql/ha)	34.5	39.9	40.8	41.1	28.8	0.8	29.9
Citrus							
Co-planted acreage (ha)	48 640	52 710	56 640	59 368	45 620	4.8	30.1
Acreage bearing fruit (ha)	41 680	42 250	42 942	43 560	40 160	1.4	8.5
Output (ql)	4 700 000	5 195 000	5 599 300	6 091 110	3 733 400	8.8	63.2
Yield (ql/ha)	113	123	130.4	139.8	93	7.2	50.4
Vine							
Co-planted acreage	58 800	68 500	79 990	94 025	97 696	3.9	43.0
Acreage bearing fruit (ha)	51 000	51 500	54 200	60 465	62 532	3.4	2.3
Yield (ql/ha)	40	38	43	38	45.4	19.5	46.5
Output (1000ql)	2 038 000	1 961 600	2 344 000	2 779 680	2 839 000	2.1	49.2

Source : MADR-DSASI.



**Table 11.14 – Olive output**

	<b>1999- 2000</b>	<b>2000- 2001</b>	<b>2001- 2002</b>	<b>2002- 2003</b>	<b>2003- 2004</b>	<b>Variation in %</b>	
						<b>2004/ 2003</b>	<b>2004/ (1991- 2000)</b>
Acreage (ha)	168 080	177 220	190 550	209 730	226 337	7.9	38.3
Olive trees co-planted with other trees	16 702 610	17 388 980	19 008 590	21 583 240	24 616 600	14.1	47.2
Bearing olive trees (number)	15 035 200	15 077 790	15 241 100	15 472 280	16 070 800	3.9	4.4
Total olive output (ql)	2 171 120	2 003 390	1 919 260	1 676 270	4 688 000	179.7	117.0
Olive yield (kg/tree)	14	13	13	10.8	29.2	170.4	108.6
<b>Output</b>							
Oil olive output (ql)	1 824 390	1 667 930	1 441 570	1 041 530	4 100 020	293.7	115.8
Table olive output (ql)	346 730	335 460	477 690	634 740	587 980	-7.4	118.5
Total olive output (ql)	2 171 120	2 003 390	1 919 260	1 676 270	4 688 000	179.7	117.0
Oil output (hl)	333 200	263 880	256 000	165 780	757 070	356.7	127.1
<b>Yield</b>							
Olive yield (kg/tree)	14.4	13.3	12.6	10.8	29.2	170.4	108.6
Oil yield (litres/ql olives)	18.3	15.8	17.8	15.9	18.5	16.4	5.7

Source : MADR-DSASI.

**Table 11.15 – Date palms: number of trees, output and yield**

Million trees	Average 1991/2000	1999- 2000	2000- 2001	2001- 2002	2002- 2003	2003- 2004	Variation	
							2004- 2003	2004/ (1991- 2000)
Number of co-planted trees (10 <sup>6</sup> )	10.3	11.9	12	13.5	14.6	15.3	4.8	48.5
Number of bearing trees (10 <sup>6</sup> )	7.7	8.9	9	9.4	9.6	9.9	3.1	28.6
Output (10 <sup>6</sup> ql)	3.2	3.7	4.4	4.2	4.9	4.4	-10.2	37.5
Yield (kg/tree)	41.6	42	49	45	51.1	44.5	-12.9	7.0

Source : MADR-DSASI.

**Table 11.16 – Forest products**

	2000	2001	2002	2003	2004	Average 2000- 2004	Evolution 2004/ 2003	Evolution 2004/Av. 2000-04
Wood (m <sup>3</sup> )	185 506	129 632	121 120	164 232	184 379	156 974	12.3	17.5
Cork (ql)	123 893	100 545	80 553	69 970	67 808	88 554	-3.1	-23.4
Esparto grass (T)	4 723	1 534	543	747	1 503	1 810	101.2	-17.0

Source : MADR-DSASI.

**Table 11.17 – Animal products**

	Average 1991- 1999	2000	2001	2002	2003	2004	Variation	
							2004/ 2003	2004/ (aver- age 91-99)
Red meat (T)	290 150	250 000	259 800	290 762	300 459	320 000	6.5	10.3
White meat (T)	178 920	198 000	201 000	150 600	156 800	170 000	8.4	-5.0
Milk (10 <sup>6</sup> litres)	1 152	1 550	1 637	1 544	1 610	1 915	18.9	66.2
Honey (T)	1 693	1 100	1 600	1 950	2 051	2 800	36.5	65.4
Wool (T)	21 119	17 462	18 146	19 752	19 908	23 000	15.5	8.9
Eggs (10 <sup>6</sup> eggs)	2 263	2 020	2 160	3 220	3 302	3 500	6.0	54.7

**Table 11.18 - Evolution of the main imports  
in volume and value**

	2003		2004		Growth 2004/2003	
	Volume (tonnes)	Value (10 <sup>3</sup> US\$)	Volume (tonnes)	Value (10 <sup>3</sup> US\$)	Growth in volume	Growth in value
Durum wheat	2 978 067	586 094	3 333 826	704 039	12	20
Common wheat	2 204 709	292 229	1 684 028	318 810	-24	9
Barley - oats	95 132	11 412	38 186	4 886	-60	-57
Maize	1 544 210	211 786	1 790 349	298 350	16	41
Rice	64 893	19 931	71 616	29 191	10	46
Other cereals	8 391	1 654	3 062	1 214	-64	-27
Total cereals	6 895 402	1 123 106	6 921 067	1 356 490	0	21
Powdered milk and cream	211 075	455 251	251 791	745 862	19	64
Rapeseed oil	37 920	22 999	42 252	28 319	11	23
Sunflower oil	240 326	137 568	233 896	150 523	-3	9
Palm oil	135 248	68 651	135 385	73 648	0	7
Soya bean oil	92 402	52 973	151 925	88 022	64	66
Total oils	505 896	282 190	563 458	340 512	11	21
Raw sugar	946 833	222 088	1 078 748	257 218	14	16
Pulses	172 697	98 981	157 741	100 694	-9	2
Plywood	199 568	44 789	84 078	56 984	-58	27
Sawn wood	670 492	240 519	686 737	254 429	2	6

**Table 11.19 - Evolution of the import prices of certain commodities**

	2003			2004			Growth 2003/2004 in %	
	Quantity (tonnes)	Value (1000 US\$)	Price (US\$/ tonne)	Quantity (tonnes)	Value (1000 US\$)	Price (US\$/ tonne)	Price	Quantity
Durum wheat	2 978 044	586 086	197	3 333 826	704 039	211	7	12
Common wheat	2 204 709	292 228	133	1 684 028	318 810	189	43	24
Barley	90 302	10 256	114	38 156	4 872	128	12	58
Maize	1 544 210	211 786	137	1 790 349	298 350	167	22	16
Unrefined sunflower oils for food industry	240 326	137 568	572	233 646	150 415	644	12	3
Unrefined soy- bean oil	92 402	52 973	573	85 412	50 001	585	2	8
Raw sugar	946 833	222 088	235	1 078 748	257 218	238	2	14
Unroasted coffee	104 814	97 458	930	128 712	112 156	871	6	23
Common wheat flour	6 728	1 411	210	30 132	16 169	537	156	348
Maize groats and meal	2 038	669	328	2 654	909	343	4	30
Corn flour	556	361	650	23	11	469	28	96
Corn starch	5 042	1 167	231	8 232	2 563	311	35	63
Unroasted malt	11 225	5 674	505	11 680	6 173	529	5	4
Roasted malt	1 141	599	525	2 173	1 144	527	0	90
Powdered milk	211 075	455 251	2 157	251 791	745 862	2 962	37	19
AMF	431	293	681	1 652	1 537	930	37	283
Sawn or stripped wood	670 492	240 519	359	686 737	254 429	370	3	2
Soybean meal	427 759	105 078	246	591 195	192 709	326	33	38

Source: calculations based on the data of the Algerian customs authorities.

**Table 11.20 – Trade by major economic region (in %)**

	<b>2 003</b>		<b>2 004</b>	
	<b>Exports</b>	<b>Imports</b>	<b>Exports</b>	<b>Imports</b>
EU-15	70	42	65	41
EU-25	70	44	67	31
OECD	80	57	70	56
CIS	1	7	2	5
NAFTA	7	17	5	23
LAIA	3	17	4	6
ASEAN	0	5	2	4
ARAB LEAGUE	14	4	21	2
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

Source: calculations based on the data of the Algerian customs authorities.

**Table 11.21 - Evolution of land developed for leasehold**

<b>Year</b>	<b>Acreage</b>	<b>Lease-holds</b>	<b>Number of jobs created</b>	<b>Expenditure (FDRMVTC)</b>	<b>Cost per ha</b>	<b>Cost per job</b>
	<b>ha</b>	<b>Number</b>	<b>Number</b>	<b>(10<sup>9</sup> DA)</b>	<b>DA</b>	<b>DA</b>
1999	8 509	4 584	5 054	0.80	94 018	158 290
2000	37 905	3 675	16 939	3.04	80 201	179 468
2001	29 286	4 939	11 809	4.75	162 194	402 236
2002	54 091	2 495	23 001	3.89	71 916	169 123
2003	135 368	3 221	22 518	5.77	42 625	256 239
2004	59 823	4 955	37 355	8.21	137 238	219 783
<b>TOTAL</b>	<b>324 982</b>	<b>23 869</b>	<b>116 676</b>	<b>26.46</b>	81 420	226 782

Source: MADR. Directorate for Land Organisation and Property.

**Table 11.22 – Distribution by cost line provided in the 2005-2009 5-year plan**

<b>SECTORS</b>	<b>Amount in billion DA</b>	<b>%</b>
<b>I – Programme for improving the living conditions of the population comprising:</b>	<b>1908.5</b>	<b>45.4</b>
- Housing	555	13.2
- Universities	141	3.4
- State education system	200	4.8
- Vocational training	58.5	1.4
- Public health	85	2.0
- Water supply for the population (excl. major waterworks projects)	127	3.0
- Youth and sports	60	1.4
- Cultural activities	16	0.4
- Connection of households to the gas and electricity mains	65.5	1.6
- National solidarity action	95	2.3
- Developing radio and television	19.1	0.5
- Construction of religious infrastructures	10	0.2
- Area management operations	26.4	0.6
- Municipal development schemes	200	4.8
- Development of the regions in the south	100	2.4
- Development of the regions in the High Plateaus	150	3.6
<b>II – Programme for developing basic infrastructures comprising:</b>	<b>1703.1</b>	<b>40.5</b>
- Transport sector	700	16.7
- Civil engineering sector	600	14.3
- Water sector (dams and transfers)	393	9.4
- Area management sector	10.15	0.2
<b>III – Programme for supporting economic development comprising:</b>	<b>337.2</b>	<b>8.0</b>
- Agriculture and rural development	300	7.1
- Industry	13.5	0.3
- Fisheries	12	0.3
- Investment promotion	4.5	0.1
- Tourism	3.2	0.1
- SMEs and craft trades	4	0.1

**Table 11.22 (contd.)**

<b>SECTORS</b>	<b>Amount in billion DA</b>	<b>%</b>
<b>IV – Development and modernisation of the public service comprising:</b>	<b>203.9</b>	<b>4.9</b>
- Judiciary	34	0.8
- Interior	65	1.5
- Finance	64	1.5
- Wholesale and retail trade	2	0.0
- Post and new information and communication technologies	16.3	0.4
- Other State sectors	22.6	0.5
<b>II – Programme for developing new communication technologies</b>	<b>50</b>	<b>1.2</b>
<b>Total of the 2005-2009 5-year programme</b>	<b>4202.7</b>	<b>100.0</b>

Source: Prime Minister's Office.

**Table 11.23 - Self-supply rate**

<b>Rate of self-sufficiency in food production in %</b>						
	<b>1995</b>	<b>1996</b>	<b>1997</b>	<b>1998</b>	<b>1999</b>	<b>2000</b>
<b>Total winter cereals</b>	<b>29.7</b>	<b>61.4</b>	<b>15.0</b>	<b>40.3</b>	<b>28.6</b>	<b>13.5</b>
Durum wheat	24.2	58.7	15.3	32.9	20.1	10.5
Common wheat	20.8	36.6	8.5	47.5	41.8	18.3
Barley	79.1	100.0	46.4	55.6	43.6	22.3
Oats	100.0	100.0	98.7	99.9	91.1	47.9
<b>Pulses</b>	<b>24.2</b>	<b>31.8</b>	<b>17.0</b>	<b>24.7</b>	<b>21.5</b>	<b>11.9</b>
Unsplit peas	21.9	35.7	7.2	18.8	16.1	10.2
Chick peas	46.9	35.8	28.9	39.7	25.5	15.3
Dried beans	0.5	1.2	1.8	3.1	2.4	1.1
Lentils	1.4	1.7	1.0	1.0	0.8	0.3
Faba beans and broad beans	99.8	100.0	98.3	99.2	93.1	94.7
<b>Horticultural crops</b>	<b>97.3</b>	<b>98.4</b>	<b>92.8</b>	<b>97.4</b>	<b>97.0</b>	<b>94.8</b>
Potatoes	92.9	96.0	81.2	92.6	92.0	90.1
Tomatoes	100.0	100.0	100.0	100.0	100.0	100.0
Onions	100.1	99.9	99.8	100.0	100.0	92.9
Garlic	98.6	88.8	88.0	93.1	97.2	97.7
<b>Animal products</b>	<b>44.2</b>	<b>51.5</b>	<b>45.0</b>	<b>45.0</b>	<b>51.7</b>	<b>51.8</b>
Milk	34.5	43.6	36.3	36.6	44.5	44.7
Eggs	99.7	97.8	98.1	95.7	100.0	99.9
Red meat	90.8	92.6	97.2	94.4	93.2	94.6
White meat	100.0	99.8	100.0	100.0	100.0	100.0

**Table 11.23 (contd.)**

<b>Rate of self-sufficiency in food production in %</b>					
	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>Average 1995-2004</b>
<b>Total winter cereals</b>	<b>35.2</b>	<b>30</b>	<b>44.7</b>	<b>43.1</b>	<b>37.7</b>
Durum wheat	30.9	21.1	37.7	34.4	<b>28.4</b>
Common wheat	31.1	18.4	34.5	31.4	<b>28.5</b>
Barley	62.8	41.2	93.1	97.0	<b>69.6</b>
Oats	81.1	82.6	94.1	100.0	<b>93.7</b>
<b>Pulses</b>	<b>18.1</b>	<b>20.7</b>	<b>25.6</b>	<b>26.2</b>	<b>22.4</b>
Unsplit peas	24.1	25.7	59.6	37.0	<b>24.1</b>
Chick peas	14.9	30.3	27.3	24.9	<b>27.7</b>
Dried beans	1.6	1.6	2.4	2.7	<b>1.8</b>
Lentils	1.0	0.7	0.7	1.5	<b>0.9</b>
Faba beans and broad beans	94.3	83.7	94.9	96.1	<b>95.3</b>
<b>Horticultural crops</b>	<b>96.9</b>	<b>94.7</b>	<b>96.7</b>	<b>96.9</b>	<b>96.3</b>
Potatoes	91.4	88.4	94.9	94.4	<b>91.7</b>
Tomatoes	100.0	100.0	100.0	96.7	<b>99.2</b>
Onions	100.0	98.5	100.1	99.2	<b>99.1</b>
Garlic	95.1	92.3	95.7	89.3	<b>93.5</b>
<b>Animal products</b>	<b>47.4</b>	<b>46.1</b>	<b>49.9</b>	<b>48.4</b>	<b>48.1</b>
Milk	40.7	39.9	41.2	41.2	<b>40.5</b>
Eggs	100.0	100.0	99.8	99.2	<b>99.2</b>
Red meat	98.2	99.3	87.9	78.1	<b>92.1</b>
White meat	100.0	100.0	100.0	100.0	<b>100.0</b>

Source: calculations based on customs data (National Centre for Computer Engineering and Statistics - CNIS).



**Table 11.24 – Financing of the agricultural and rural sector  
(actual expenditure in 10<sup>6</sup> DA)**

	<b>2003</b>	<b>2004</b>	<b>Variation 2003/2004</b>
1 – Public amenities budget of the Ministry of Agriculture and Rural Development	8.24	8.22	-0.3
2- FNRDA National Agricultural and Rural Development Fund	37.41	29.22**	-21.9
3- FDRMVTC. Fund for Rural Development and Land Development through Leasehold	5.77	5.00	-13.3
4- FLDPPS. Fund for Combating Desertification and Promoting the Steppe	1.00	2.60	160.0
5- Total Funds (2+3+4)	44.18	36.82	-16.7
6- Total (1+5)	52.42	45.04	-14.1
7 – Farm income support	2.08	1.28*	-38.3
<b>TOTAL (6+7)</b>	<b>54.49</b>	<b>46.32</b>	<b>-15.0</b>

\* Author's estimation

\*\* Not including farm income support (subsidisation of the production and collection of wheat and milk, subsidisation of the use of certain inputs for certain crops, etc.)

**Table 11.25 – Some data on fisheries in Algeria**

	<b>1999</b>	<b>2000</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>
Output (1000 tonnes)	90	113	134	134	142	137
Variation	-3%	26%	18%	1%	5%	-3%
Number of boats	2 464	2 552	2 661	2 880	3 292	3 400
Variation	6%	4%	4%	8%	14%	3%
Seamen	26 591	28 225	29 004	30 544	34 046	37 502
Variation	2%	6%	3%	5%	11%	10%

**Table 11.26 – Balance sheet of the Directorate General for Forestland (1999-2004)**

	2000	2001	2002	2003	2004	General total
<b>Acreage under plantation (ha)</b>	28 624	41 874	36 379	33 209	28 431	168 517
Forest trees (ha)	11 325	6 839	8 138	12 115	14 285	52 702
Fruit-tree plantations (ha)	16 893	33 553	27 298	18 954	12 174	108 872
Vine plantations (ha)	406	1 474	861	2 044	1 937	6 722
Phoenix date palm plantations (ha)	0	8	82	96	35	221
<b>Area under forestry work (ha)</b>	8 000	18 563	19 138	27 819	19 648	93 168
<b>Deferral of grazing (ha)</b>	0	10 000	0	20 000	48 850	78 850
<b>Land improvement (ha)</b>	3 700	1 772	2 006	3 956	6 214	17 648
<b>Clearing of new tracks (km)</b>	210	801	758	1 788	870	4 427
<b>Development of forest tracks (km)</b>	400	1 140	1 321	1 833	1 223	5 917
<b>Torrent regulation (m<sup>3</sup>)</b>	242 941	377 148	418 602	712 623	843 686	2 595 000
<b>Rehabilitation of benches (ha)</b>	2 513	1 326	833	2 748	662	8 082
<b>Development of water holes (units)</b>	0	15	72	237	246	570
<b>Job creation:</b>	48 550	62 595	107 846	129 053	102 601	450 645
Permanent jobs*	20 500	13 563	21 904	18 546	17 122	91 635
Temporary jobs	28 050	11 083	10 662	8 453	9 092	67 340
Number of days of work	5 185 884	1 345 771	963 724	906 842	898 732	9 300 953
Permanent job equivalent (no. of days of temporary work/240)	21 608	5 607	4 016	3 779	3 745	38 755
Casual employment	0	43 425	81 906	106 728	81 734	313 793

**Table 11.26 (contd.)**

	<b>Average 2000-2004</b>	<b>Evolution 2004/2003</b>	<b>Evolution 2004/Average 2000-2004</b>
<b>Acreage under plantation</b>	33 703	-14.4	-15.6
Forest trees (ha)	10 540	17.9	35.5
Fruit-tree plantations (ha)	21 774	-35.8	-44.1
Vine plantations (ha)	1 344	-5.2	44.1
Phoenix date palm plantations (ha)	44	-63.5	-20.8
<b>Area of forestry work (ha)</b>	18 634	-29.4	5.4
<b>Deferral of grazing (ha)</b>	15 770	144.3	209.8
<b>Land improvement (ha)</b>	3 530	57.1	76.1
<b>Clearing of new tracks (km)</b>	885	-51.3	-1.7
<b>Development of forest tracks (km)</b>	1 183	-33.3	3.3
<b>Torrent regulation (m<sup>3</sup>)</b>	519 000	18.4	62.6
<b>Rehabilitation of benches (ha)</b>	1 616	-75.9	-59.0
<b>Development of water holes (units)</b>	114	3.8	115.8
<b>Job creation:</b>	90 129	-20.5	13.8
Permanent jobs*	18 327	-7.7	-6.6
Temporary jobs	13 468	7.6	-32.5
Number of days of work	1 860 191	-0.9	-51.7
Permanent job equivalent (no. of days of temporary work/240)	7 751	-0.9	-51.7
Casual employment	62 759	-23.4	30.2

- \* Permanent jobs: number of beneficiaries of fruit-tree, vine and date palm plantations.  
 Temporary jobs: created in the context of the operating budget of the forestry authorities and other institutions.  
 Casual jobs: created by undertakings which have signed contracts with the DGF to carry out projects.

**Table 11.27 – Development of land by leasehold  
Situation concerning cumulated projects (since 1999)  
by ecological zone as at 31-3-2005**

	<b>Acreage ha</b>	<b>Number of lease- holds</b>	<b>Number of jobs created</b>	<b>Acreage %</b>	<b>Lease- holds %</b>	<b>Number of jobs created %</b>	<b>ha/ lease- hold</b>
Mountains	127 811	11 968	53 801	37	49	40	10.7
Steppe	207 403	7 908	73 031	60	33	55	26.2
South	11 451	4 442	7 128	3	18	5	2.6
<b>Total</b>	<b>346 665</b>	<b>24 318</b>	<b>133 960</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>14.3</b>

Source: MADR. Directorate for Land Organisation and Property.

**Table 11.28 - Development of land by leasehold  
Situation of cumulated projects (since 1999)  
by management system  
as at 31-3-2005**

	<b>Acreage ha</b>	<b>Number of leaseholds</b>	<b>Number of jobs created</b>	<b>Acreage %</b>	<b>Lease- holds %</b>	<b>Number of jobs created %</b>	<b>ha/ lease- hold</b>
Rain-fed	193 862	10 027	53 444	56	41	40	19
Irrigated	152 802	14 291	80 516	44	59	60	11
<b>Total</b>	<b>346 664</b>	<b>24 318</b>	<b>133 960</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>14</b>

Source: MADR. Directorate for Land Organisation and Property.

**Table 11.29 – Fisheries product imports**

	Quantities (tonnes)			Value (10 <sup>6</sup> US\$)		
	2002	2003	2004	2002	2003	2004
1. Frozen white tuna (Thunnus)	1 882	8 045	5 842	1.8	5.5	6.0
2. Frozen hake (Merluccius)	2 347	3 955	4 446	1.2	2.8	4.1
3. Other frozen fish	1 567	4 405	5 017	0.8	3.5	5.1
Subtotal 1+2+3	5 795	16 405	15 304	3.8	11.8	15.2
4. Other fish	3 610	3 500	5 168	2.8	3.7	6.5
<b>Total imports</b>	<b>9 405</b>	<b>19 905</b>	<b>20 472</b>	<b>6.6</b>	<b>15.5</b>	<b>21.7</b>

	Evolution quantities			Evolution value			Price per tonne US\$		
	2002	2003	2004	2002	2003	2004	2002	2003	2004
1. Frozen white tuna (Thunnus)	100	427	310	100	303	331	964	683	1 028
2. Frozen hake (Merluccius)	100	169	189	100	243	357	494	712	931
3. Other frozen fish	100	281	320	100	436	631	513	795	1 012
Subtotal 1+2+3	100	283	264	100	313	403	652	720	995
4. Other fish	100	97	143	100	131	235	770	1 043	1 262
<b>Total imports</b>	<b>100</b>	<b>212</b>	<b>218</b>	<b>100</b>	<b>236</b>	<b>332</b>	<b>697</b>	<b>777</b>	<b>1 062</b>

Source : national customs authorities (CNIS).

**Table 11.30 – Balance of trade in fisheries products**

		1999	2000	2001	2002	2003	2004	Increase 2003/2004
<b>Imports</b>	Tonnes	7 809	7 902	7 893	11 242	19 905	20 472	3
	1000 US\$	13 170	16 900	13 880	8 970	15 466	21 744	41
	US\$/Tonne	1 687	2 139	1 759	798	777	1 062	37
<b>Exports</b>	Tonnes	905	1 452	1 632	2 479	1 852	1 947	5
	1000 US\$	2 880	4 700	5 350	5 880	6 880	9 495	38
	US\$/Tonne	3 182	3 237	3 278	2 372	3 715	4 876	31
<b>Balance</b>	1000 US\$	-10 290	-12 200	-8 530	-3 090	-8 586	-12 250	43
<b>Import-export ratio</b>	%	22%	28%	39%	66%	44%	44%	

Source : calculated on the basis of customs data.



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**Agriculture, fisheries, food and  
sustainable rural development  
in the Mediterranean region**



Annual report  
2006

Centre International de Hautes Etudes Agronomiques Méditerranéennes

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