Tomato sector in Algeria

Mohamed Ridha MESSAK
E-mail: messak.ridha@gmail.com
Mohamed Khider University
Biskra-ALGERIA

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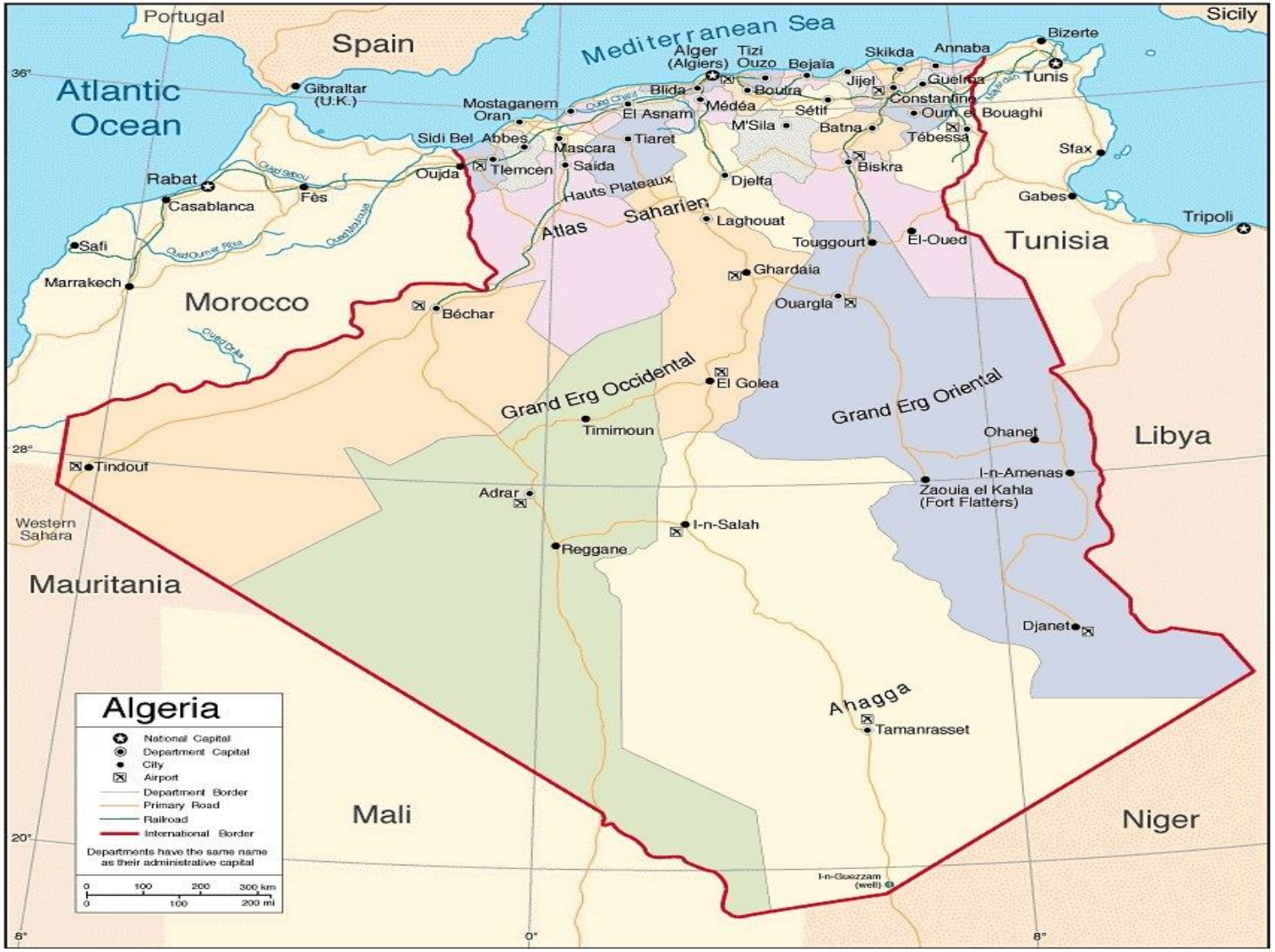
Algeria is a wide agricultural land



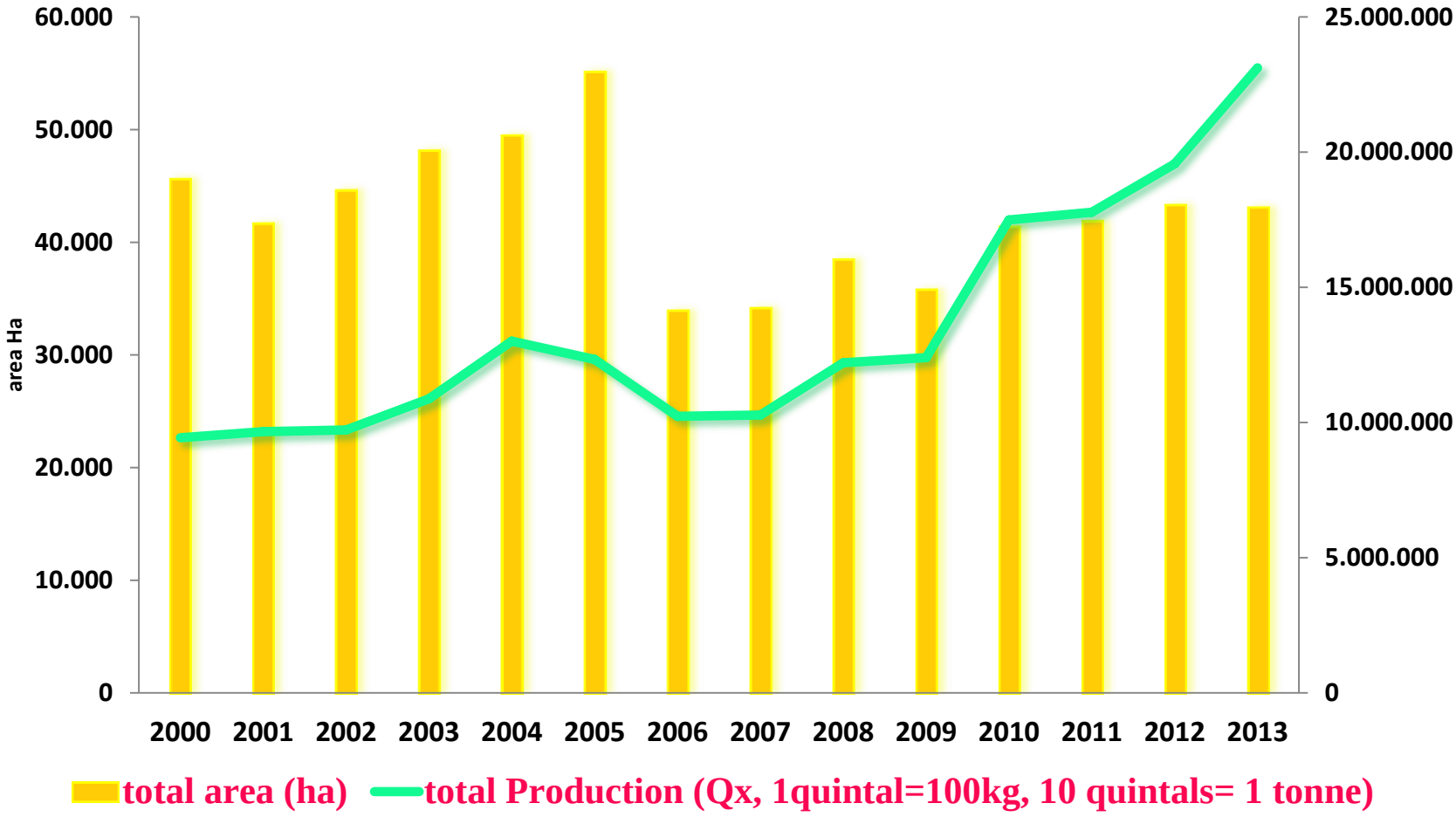
Algeria is a wide agricultural land

Population (On 01 January 2014, ONS, 2014)	**38,7 millions Hab**
Rural population	**13 millions Hab**
Rural agglomerations	**3 677/4563**
Rural communities	**979/1541**
Rural households	**1 750 000**
Total agricultural area	**49 204 050 ha**
UAA (Surface agricole utile, SAU)	**8 435 000 ha**
Agricultural area irrigated	***11,7%*** *(985 200 ha)*
Number of farms	**1 145 500 (9% maraichers)**
Employment on farms	**2 420 170**
Sheep (number)	**23 000 000**
Cattle (number)	**1 750 000**
Agricultural value added (AVA /gross domestic product)	**10%**
Climate Source: MADR, 2014	**Mediterranean in the North climate desert in South**

Tomato production in Algeria

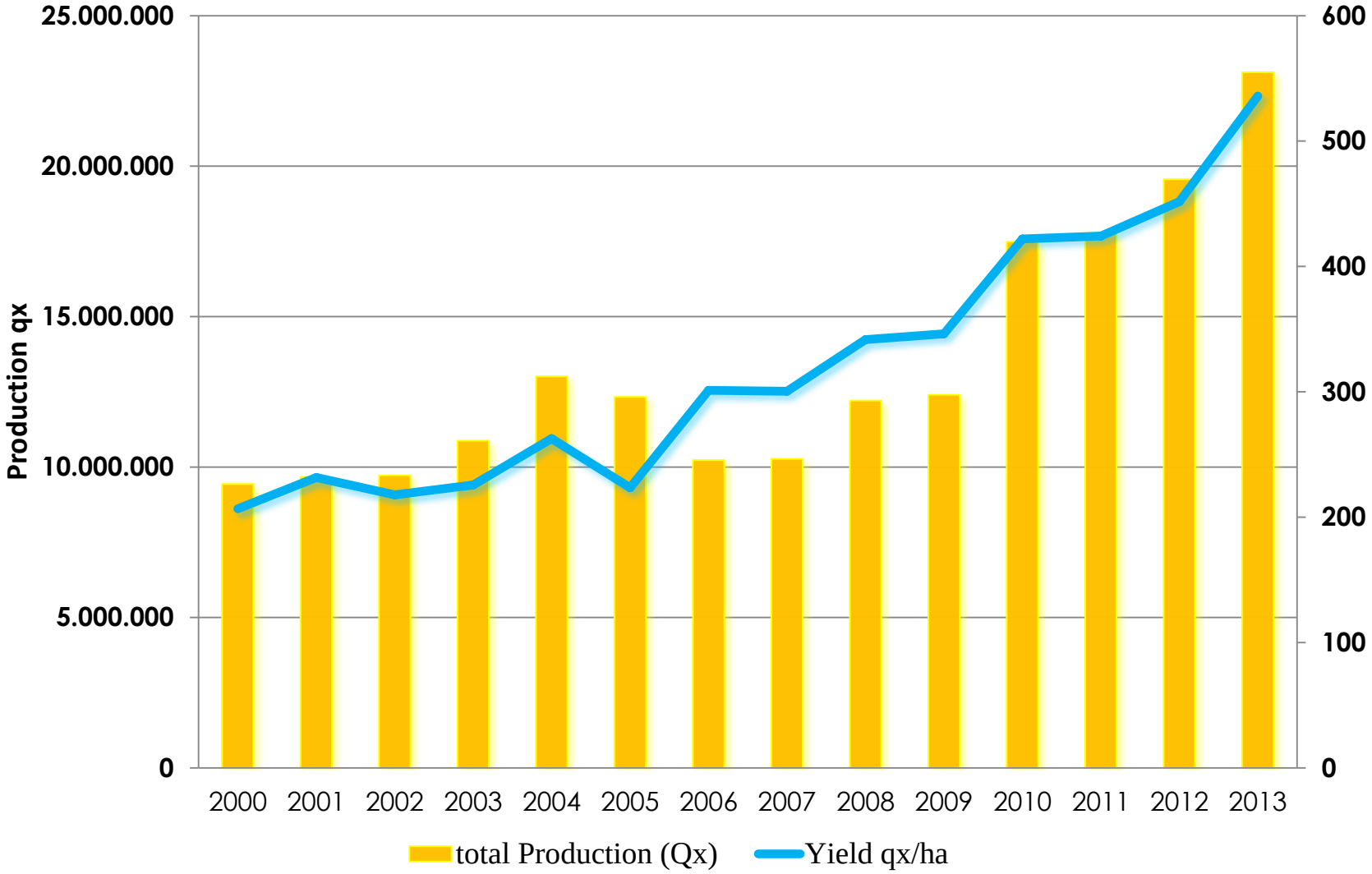
- In Algeria, demand for tomato is increasing (as a result of population growth and change in consumption patterns)
- With regard to its area, tomato is the 4th product after potato, water melon and onion
- Tomato is 8.2% of the total area allocated for Horticulture and industrial crops (MADR, 2013)
- Production is 8.8% of total production of vegetable crops and 8.3% from the total production of Horticulture and industrial crops.
- Globally, evolution of tomato yields (= 18.16%) is higher than that of Horticulture crops (14.1%).

Evolution of the area and production of tomato in Algeria, 2000-2013

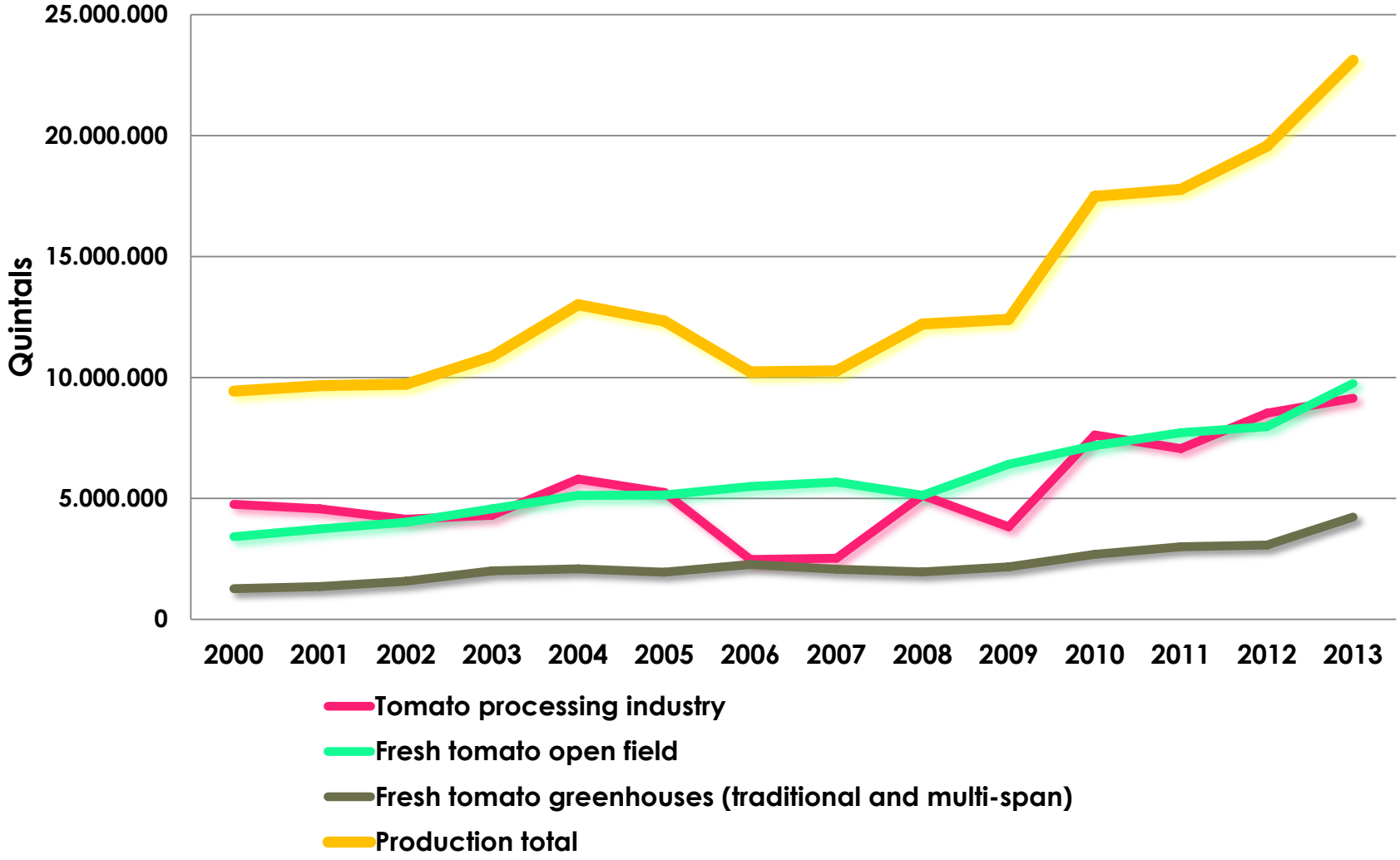


→ increased production despite the fluctuation of area

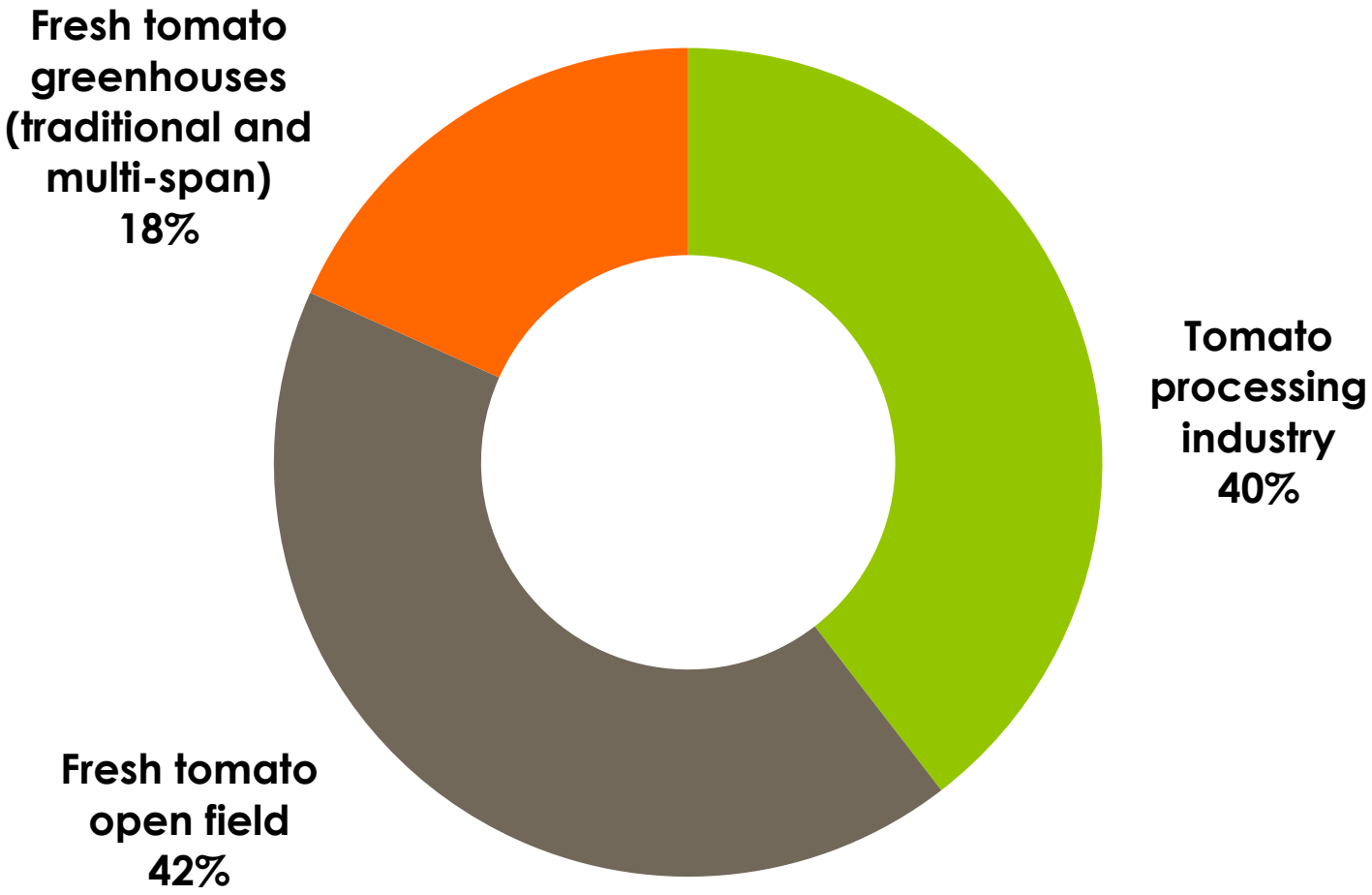
Relationship between tomato production and yields



Fluctuations of the total production are very influenced by those of industrial tomato



Structure of the production, 2013

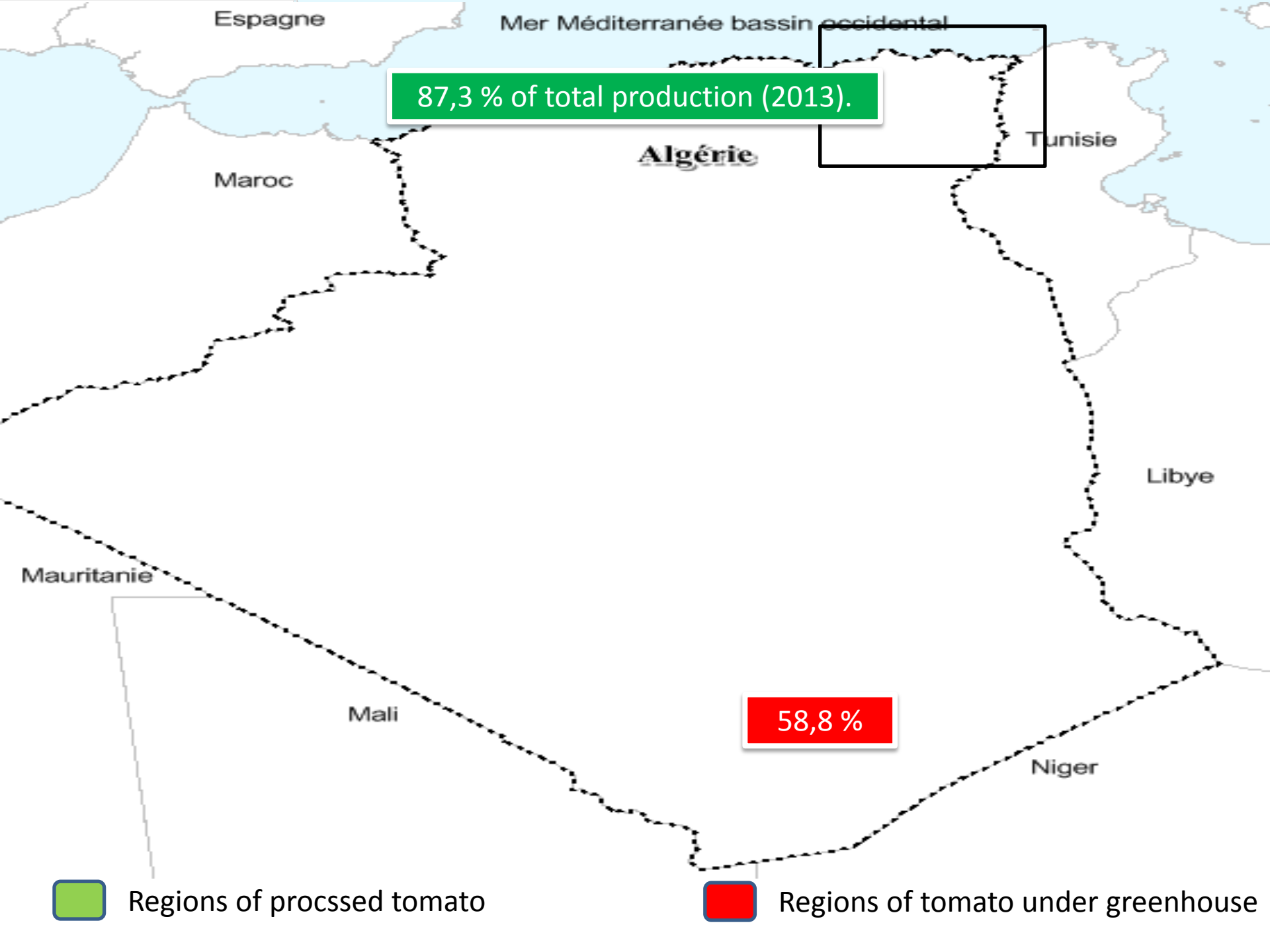


Main features of industrial tomato in Algeria

- Industrial tomato is considered strategic for Algeria
- Represents 7.17% compared to the production of Horticulture and industrial crops; and 97.4% of the total production of industrial crops
- Low Yield (538,9qx/ha) and extensive methods of production (low level of investment, unimproved seeds, low level of mechanization)
- Price determined by the demand of processing companies (there are only few → oligopol)
- Supply fluctuating (dependent on climatic factors…);
- Production regions: 4 Eastern Regions (Guelma, Annaba, El-Taref and Skikda): produce 87.3% of total production in 2013)

Main features of greenhouse tomato

- Covers 3 678.9 ha, produces 4.2 million quintals, with an important Yield (1 149,1 qx/ha)
- Increasing offer, out of early product and extra-early product
- Intensive method of production (applying technologies and innovations, hybrid seeds, saving irrigation, investment…);
- Price determined by supply – demand on the market (rather free market since many actors)
- Area of production: Algerian south-east – Biskra
  - Biskra is the Algerian center for greenhouse tomato production, in particular in modern multi -span greenhouses
  - There, 58.8% of the national offer are produced
  - With 139,16 t/ha by 44 600 greenhouses (1787 ha, in 2013).


Espagne
Mer Méditerranée bassin occidental
87,3 % of total production (2013).
Tunisie
Algérie
Maroc
Libye
Mauritanie
Mali
58,8 %
Niger
Regions of procssed tomato
Regions of tomato under greenhouse

Tomato under-greenhouse (Biskra, Algeria)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Modern multi -span greenhouses


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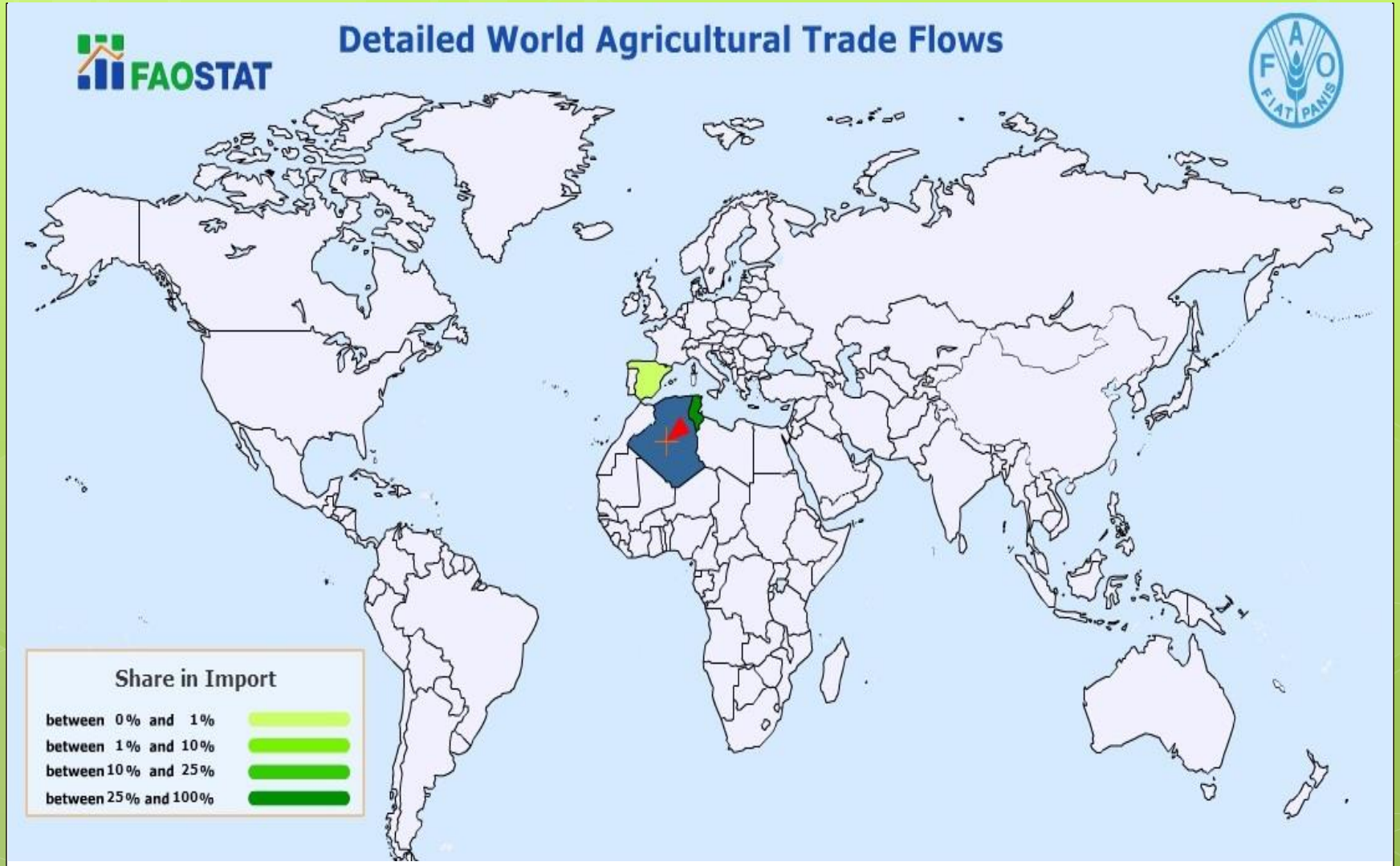
Tomato production around the globe (2012)

N°	Country	Production (tonne)
1	China	50125055
2	India	17500000
3	U.S .A	13206950
4	Turkey	11350000
5	Egypt	8625219
6	Iran	6000000
7	Italy	5131977
8	Spain	4007000
9	Brazil	3873985
10	Mexico	3433567
11	Uzbekistan	2650000
12	Russian F.	2456100
13	Ukraine	2274100
14	Nigeria	1560000
15	Portugal	1392700
16	Morocco	1219071
17	Iraq	1100000
18	Tunisia	1100000
19	Greece	979600
20	Indonesia	887556
21	Cameroon	880000
22	Netherlands	805000
23	Algeria	796963
24	Syria	783874
25	Poland	758936
26	Japan	722300
27	Argentina	715000
28	Kazakhstan	706000
29	Romania	683282
30	Colombia	646904
31	Jordan	616427
32	France	588660
33	South Africa	564740
34	Pakistan	560000
35	Saudi Arabia	525000
36	Cuba	494432
37	Canada	489763
38	Azerbaijan	471612
39	Korea	432739
40	Chile	400000
41	Kenya	397000
42	Israel	392154
43	Australia	371514
44	Turkmenistan	365000
45	Tajikistan	328800
46	Ghana	321000
47	Lebanon	320000
48	Guatemala	315000
49	Armenia	265174
50	Dominican R,	258811
	TOTAL WORLD	161793834

N°	Country	Area harvested (ha)
1	China	1005003
2	India	870000
3	Turkey	300000
4	Nigeria	270000
5	Egypt	216395
6	Iran	160000
7	U.S.A	150140
8	Cameroon	150000
9	Russian F.	117700
10	Mexico	96651
11	Italy	91850
12	Ukraine	85700
13	Brazil	63859
14	Iraq	62500
15	Uzbekistan	60000
16	Indonesia	56042
17	Pakistan	55000
18	Romania	49620
19	Spain	48800
20	Ghana	44750
21	Cuba	43589
22	Tunisia	28900
23	Kazakhstan	28000
24	Azerbaijan	25578
25	Algeria	21542
26	Kenya	19000
27	Colombia	16844
28	Saudi Arabia	16700
29	Argentina	16000
30	Greece	16000
31	Morocco	15639
32	Portugal	15400
33	Syria	14579
34	Poland	13108
35	Japan	12000
36	Tajikistan	12000
37	Jordan	10413
38	Turkmenistan	9800
39	Guatemala	9000
40	South Africa	7500
41	Australia	7415
42	Dominican R,	7245
43	Canada	6480
44	France	6369
45	Korea	6344
46	Armenia	6260
47	Chile	5463
48	Israel	5000
49	Lebanon	4500
50	Netherlands	1691
	TOTAL WORLD	4803680

FAO, 2014



according to FAO, the main suppliers of Algeria, are Tunisia and Spain.

FAO, 2014

CONCLUSION

- To ovoid the fluctuation of production, policy must better regulate the sector of processed tomato and ameliorate the capacity of the transformation stage (number of companies).

- To increase the quantity of production, agriculture policy must encourage the producers to adopt the technology of multi-span greenhouses.

Thank you

Mohamed Ridha MESSAK
E-mail: messak.ridha@gmail.com
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