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SUMMARY – Livestock farming in the Magreb countries is heavily dependent on feeds and on their imports, mainly maize, barley and soya cake. The amount of imports depends heavily on the climatic conditions. Maize imports for Magreb varied between 1.5 and 2.5 million tons in the period 1990-1999. Barley has a considerable production in these countries (between 2 and 4 million tons); nevertheless this production is not enough for the needs and imports (from 200,000 tons in 1996 to 2 millions tons in 1993). Soya cake imports are also considerable (up to 600,000 tons in 1996).

Key words: Feed, raw materials, Magreb.

RESUME – *"Le marché des matières premières dans les pays du Maghreb". L'élevage dans les pays du Maghreb est fortement dépendant des aliments pour bétail et de leur importation, principalement maïs, orge et tourteaux de soja. Le volume des importations dépend fortement des conditions climatiques. Les importations de maïs pour les pays du Maghreb ont fluctué entre 1,5 et 2,5 millions de tonnes pour la période 1990-1999. L'orge présente une production considérable dans ces pays (entre 2 et 4 millions de tonnes) ; cependant cette production n'est pas suffisante par rapport aux besoins, de là les importations (de 200 000 tonnes en 1996 à 2 millions de tonnes en 1993). Les importations de tourteaux de soja sont également considérables (jusqu'à 600 000 tonnes en 1996).*

Mots-clés : *Aliment pour bétail, matières premières, Maghreb.*

Livestock farming in the Maghreb countries will be facing the ever-increasing demand of animal proteins (meat, milk and eggs) due to the improvement of lifestyle and changes in food habits in Tunisia and the other Maghreb countries. In this context, development policies for the agricultural sector have placed particular importance in the improvement in quality and quantity of animal feeds so as to allow a better exteriorization of the genetic potential and thus a maximum valorization of investments.

However, livestock farming in Maghreb countries is strongly dependent on climatic conditions. The evolution of the number of heads clearly shows a jagged pattern due to the influence of climatic uncertainty.

Due to these conditions of the natural environment and to the exploitation modalities in this region, livestock farming, which is considered as a strategic activity socially and economically, is still highly reliant on foreign market conditions for raw materials and food additives.

Availability of raw materials destined to animal feeding in Maghreb countries

Maize is very limited in Maghreb countries, and its development is burdened by its strong dependence on irrigation and its high sensitiveness to irrigation water salinity. It has to face strong competition from vegetable crops. Morocco is the only country that has developed this crop in irrigated areas for grain production (15 to 20% of annual requirements). Thus, the supply of maize grain in Maghreb countries is totally under the dependence of foreign markets.

Maize imports of Maghreb countries during the period 1990-1999 varied between 1.5 and 2.5 million tons (2 to 4% of world imports). The USA are the first suppliers of the region, followed by the European Union with a very small proportion.

Algeria is the first maize importer among Maghreb countries, with an average of almost 900,000 tons/year. As for Morocco and Tunisia, their maize imports are continuously increasing, from 200,000 tons in 1990 each one to more than 700,000 tons for Tunisia and more than a million tons for Morocco. This trend is essentially attributed to the development of the poultry sector and the improvement of feed allowances for cattle.

Barley is a traditional crop in Maghreb countries. Its production is influenced by climatic conditions in that region, and is between 2 and 4 million tons. However, this production hit a record in 1996 with a peak of 7 million tons, which represents about 4.5% of world production.

The availabilities in locally produced barley in Maghreb countries are globally less than domestic demand, and consequently the balance is a deficit. Imports made by Maghreb countries vary from 200,000 tons (1996) to over 2 million tons (1993), which represents from 3 to 15% of the volume of world imports. Libya is the main barley importer among Maghreb countries due to its scarce production. The imports of other countries are closely dependent on the production of the year.

Sorghum has less water requirements than maize and has better tolerance to bad quality water. Sorghum production in Maghreb countries is 20,000 tons mainly produced in Morocco. The demand is low in these countries (40,000 tons of which 30,000 are for Morocco). These imports fluctuate as this crop faces strong competition from maize: as soon as its price comes near that of maize, sorghum is excluded from animal feeding schemes.

Soya is an excellent source of vegetal oil for human consumption and a quality protein food for animals. However, its cultivation in Maghreb countries is hampered by the scarcity of water resources on the one hand, and by the lack of tradition of Maghreb farmers on the other hand. But soya cake is most demanded in modern husbandry, especially for poultry production and for ruminant feeds.

The use of soya cake in Maghreb countries is growing every year. There is total deficit, and imports are the only source of supply for domestic markets. The imports of Maghreb countries moved from 160,000 tons in 1981 to over 600,000 tons in 1998. Algeria is the first importer, followed by Tunisia and Libya.

Tunisian soya cake imports showed a jagged evolution in the 1980s. During the 1990s, they evolved steadily from 120,000 tons in 1990 to over 150,000 tons in 1998. Morocco imports low quantities of soya cake, only from 1995 onwards did this country begin to import significant amounts. This evolution is explained through the substitution of this product by fish meal (650,000 tons/year) and by soya imports as grain (150,000 tons/year).

Agro-industrial by-products have a variable but significant production from one Maghreb country to another. In fact, fish meal is produced, or even exported to Morocco, being poorly integrated in rations for poultry in the other Maghreb countries.

By-products of olive milling are underutilized due to certain nutritional problems and to the lack of an integrated support strategy.

Bran and grinding by-products are produced in proportion to the milling industry existing in these countries. Morocco and Libya are importers of these by-products. Tunisia is both exporter and importer of bran, and has regularly exported great amounts of bran during the 1980s, but in 1995 this country imported over 20,000 tons.

Libya and Morocco are peculiar in that they produce groundnuts, their production being over 20,000 tons. Libya imports over 5000 tons annually. Both countries are also peculiar in that they regularly import cotton cake for a volume of 5000 tons each one.

Morocco produces over 60,000 tons of oat grain annually and has not the same deficit as the other Maghreb countries. Oat production in Algeria and Tunisia is low, being approximately 10,000 tons for Algeria and only 3000 tons for Tunisia.

Algeria is the only country which imports very small amounts of rapeseed cake, approximately 500 to 1000 tons, while in 1995 Morocco began to import great volumes of sunflower cake, over 24,000 tons in 1998 and continues to import great amounts of beet pulp (an average of 100,000 tons per year) to make for the deficit concerning this sub-product.

Rye and manioc are not used in any of the Maghreb countries.

The market of raw materials for animal feeding in the Maghreb countries

The market of raw materials for animal feeding in the Maghreb countries is characterized by:

(i) A low diversification of imported raw materials (mainly maize, barley, and soya cake), while the international market offers a multitude of products and by-products that can be integrated in animal feeding.

(ii) Trade practices and procedures that differ from one product to another and from one country to another one. They range from totally free trade to total monopoly as far as imports are concerned.

(iii) Import fluctuations for barley, very well explained by climatic conditions.

(iv) A general trend towards an increase of demand and deficit.

Thus, the Maghreb countries can be considered as net importers, and their imports are strongly dependent on climatic uncertainty in this region.