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**Update on Fertilizer Supply/Demand in Africa
By
Eng. M. Fathey El-Sayed
Arab Fertilizer Association**

1- Arab Agricultural Sector

The Agricultural sector is a major economic sector in the Arab region. It plays an important role in the economies of the Arab countries. Its share in (GDP) in Arab countries averaged about 9.2%, with a maximum of more than 60% in some countries. The sector also plays a significant role in Arab food security and accommodates about 30% of the labor force. Moreover, the share of agricultural export in the total export earnings is ranges between 15% and 63% in some Arab countries like (Mauritania Sudan, Jordan, and Egypt).

2 - Main characteristics of Arab Agricultural Sector:

- Water resource scarcity & relatively low water use efficiency
- Low agricultural productivity & wide productivity gap between Arab and other developed countries.
- Imbalance and inefficient use of resources due to their uneven distribution
- Slow rate of development due to weak infrastructure, soil deterioration and inadequacy of technical support in traditional sector.

3 - Agricultural resources and Food production:

- The total area of agricultural lands is estimated at about 71.3 million hectares; of which 18 million hectares is fallow land, and most of the grown area (76%) is under the rain-fed system.
- Cereals occupies most of the grown area (61.5%), followed by the oil seeds (11.6%), fruits (7.7%), forage crops (5%), vegetables (4.4%).

3.1 – Land use in Arab Countries-2006

Area (1000 HA)

Country	Permanent		Seasonal Crops		Uncultivated Area	Forests	Pastures
	Irrigated	Rainfed	Irrigated	Rainfed			
Jordan	49.09	108.41	42.25	91.40	72.57	130.91	7000.00
Emirates	188.75	-	44.76	-	-	31.10	305.00
Bahrain	3.05	-	0.66	-	0.74	-	4.00
Tunisia	176.72	2112.84	179.30	1797.70	913.42	658.05	4927.90
Algeria	414.22	519.74	421.37	3643.48	3404.76	4303.00	32776.67
Djibouti	-	-	-	0.41	-	6.00	200.00
S. Arabia	223.00	-	851.00	-	3283.00	2700.00	170000.0
Sudan	205.80	1.68	1497.30	16372.44	3035.77	64359.96	117180.0
Syria	173.00	744.00	1229.00	2596.00	845.00	601.00	8290.00
Somalia	-	32.00	160.00	980.00	328.00	9040.00	42000.000
Iraq	244.50	24.00	952.25	2559.25	3149.75	478.50	4000.00
Oman	51.28	-	51.28	-	-	0.16	1000.00
Palestine	7.10	106.80	19.20	49.70	-	26.00	150.00
Qatar	2.60	-	7.10	-	17.40	0.40	50.00
Kuwait	3.04	-	5.77	-	-	-	136.22
Lebanon	55.00	87.00	54.00	72.00	-	4.00	16.00
Libya	159.00	769.00	99.00	767.00	850.00	600.00	13300.00
Egypt	604.07	92.28	2740.50	89.45	-	67.00	-
Morocco	661.80	220.30	637.30	5735.70	1691.20	3698.00	21000.00
Mauritania	5.00	50.00	17.00	250.00	-	4400.00	39250.00
Yemen	172.90	92.10	437.10	607.20	300.20	1600.00	70000
Total	3399.92	4960.45	9446.15	35611.73	17891.81	92704.08	468585.79

3.2 – Production and balance of trade of some main food Commodities in Arab countries (2007)

Production (1000 tons) value (million dollars)

Commodity	Production	Balance of trade (food gap) in million dollars	SSR (%)
Cereals	62481.5	10322.1	56.3
Wheat and Flour	31355.9	4761.1	58.2
Potatoes	11858.7	47.7	101.0
Legumes	1423.9	401.4	59.8
Vegetables	49382.0	-211.2	99.7
Fruits	30006.6	370.1	96.8
Sugar	3094.9	1923.1	33.4
Vegetable Oils	1513.5	2446.0	27.8
Red Meat	4298.1	1524.8	85.8
Poultry meat	2861.8	1250.7	74.8
Fish	3627.5	-1720.4	103.8
Milk	25525.5	3195.2	70.9
Total		19669.4	

Source: AOAD, Arab Annual Food security Report 2008.

3.3 – Some Technology gap indicators in Selected Arab & Developed Countries

Country	Cereal Productivity (2003 – 2005) (kg/ ha)	Fertilizers use (kg/ha)
Egypt	7545	375.7
Syria	1786	57.7
Morocco	1243	60.6
Sudan	650	6.8
Netherlands	8309	564
USA	6443	114

Sources: AOAD, World Bank, 2008.

4 – Supply / Demand Balance in Arab Countries

4.1 – Nitrogenous Fertilizers

1000 ton Product

Year	Urea			Ammonium Nitrate		
	Production	Consumption	Balance	Production	Consumption	Balance
2006	14378	3121	11257	1416	1506	(45)
2010	20000	3652	16348	1400	1762	(362)

4.2 – Phosphatic Fertilizers

1000 ton Product

Year	SSP			TSP		
	Production	Consumption	Balance	Production	Consumption	Balance
2006	1317	1285	32	1747	363	1384
2010	1770	1440	330	2200	425	1775

4.3 – DAP & NPK Fertilizers

1000 ton Product

Year	DAP			NPK		
	Production	Consumption	Balance	Production	Consumption	Balance
2006	3683	561	3122	556	277	279
2010	6400	735	5774	1700	266	1434

5 – Supply / Demand Balance in Egypt

5.1 – Nitrogenous Fertilizers

1000 ton (15.5% N)

Year	Supply	Demand	Balance
2008	15782	9405	6376
2010	17648	10109	7538

6 – Challenges Facing Agricultural Development and Food Security in the Region:

- 6.1- The need for improving the agricultural investment climate in the region
- 6.2- The need for accelerating technological developments relating to agriculture
- 6.3- The need for coordination between country and regional polices of agricultural development
- 6.4- the need for improving the effectiveness of farmer organizations to support production and marketing activities.