



Office: Africa
For the Month of April 2024
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Executive Summary

Overview of the market

From the 2012 to 2018 period, cultivated forage crops in North Africa had a value of \$1.76 billion. The change of farmer's practice from the use of traditional grasses to the use of improved varieties will most likely increase the demand for grass seeds within the region. Egypt has the largest cultivated land area for forage crops, cultivating a total of 600,000 hectares. It is a net exporter, exporting a total of \$54.1 million, while importing the largest amount of forage crops within the region to a total of \$29.5million. Algeria has the highest annual import growth. Export competitors of the United States within the region are Australia and Spain exporting \$23.2 million and \$5.41 million into the region in 2022, respectively. Kentucky bluegrass has the highest retail price and Egypt has the most favorable retail price for forage seeds within the region.

Production

Approximately 1.1% of land area in North Africa is used for production of forage crops (Fuglie et al., 2021). Egypt is the highest producer of forage crops as it cultivates 600,00 hectares of the crop. It is the largest exporter within the region as well. On the other hand, Algeria cultivates the lowest amount of forage crops within the region. The demand for forage crops and seeds in the region is largely in the livestock production size. Top companies that distribute seeds within the region are UPL Ltd, Corteva Agriscience, Syngenta, S&W Seed Company and MAS Seeds.



Trends

Trends within North Africa's forage seed industry can enhance the regions imports process of seeds. Such seeds are largely made up of traditional grasses, legumes and fodder. Despite the predominance of traditional grasses, the improved varieties are gradually gaining importance. Common forage crops within the region include maize, wheatgrass, oats, alfalfa, sorghum, sudan grass, cowpea, guar, ryegrass, clover, barley, canary grass, soybean, berseem, pea, triticale, strawberry tree, tree heath, *Cistus salviifolius*, *C. monspeliensis*, *Lavandula stoechas*, *Myrtus communis*, common olive, green olive, *Pistacia lentiscus*, *Quercus* spp., and wild blackberry.



Panicum in the Sahara

The Blue panicum (*Panicum antidotale* Retz.) was recently introduced into the Sahara region with its relatively promising productivity and quality when compared to traditional forage crops. Its adoption is growing within the region.

Forage Mixtures

Most farmers within the region optimize the land by practicing crop rotation with multiple forage mixtures, as an alternative to monocropping. They make use of a maximum of three forage crops annually.

Preference of Forage Seed Production in Tunisia

Forage seed production is preferred over green forage biomass or hay production as it yields better net return and profitability.

Introduction of Climate Smart Crops

Barley, wheat, spineless cactus, date palm, faba bean, lentils, Kabuli chickpea, grass pea and forage legumes are examples of climate smart crops being introduced into North Africa through the International Center for Agricultural Research in the Dry Areas (ICARDA) gene bank network and research stations located in North Africa, under the CGIAR's Global Barley Breeding Program.

Northern Africa Forage and Grass Seeds Market by Country

Egypt has the largest area in cultivated forage crops with a total of 600,000 hectares of forage is cultivated. The country also ranks both the highest exporter and importer within the region for 2022. Morocco ranked the second highest importer within the region in 2022 despite it having the lowest import growth (-48%) for the same year. Tunisia was the only country within the region with recorded imports from the US in the last five years, although approximately \$64,000 was imported from the US, representing less than 1% of the country's forage imports. The largest exporters into the region are Australia and Spain which exported approximately \$23.2 million and \$5.41 million into the region in 2022, respectively. Algeria is the only country within the region with a positive annual import growth (29%) between 2021 and 2022 despite it having the lowest import value in the region.

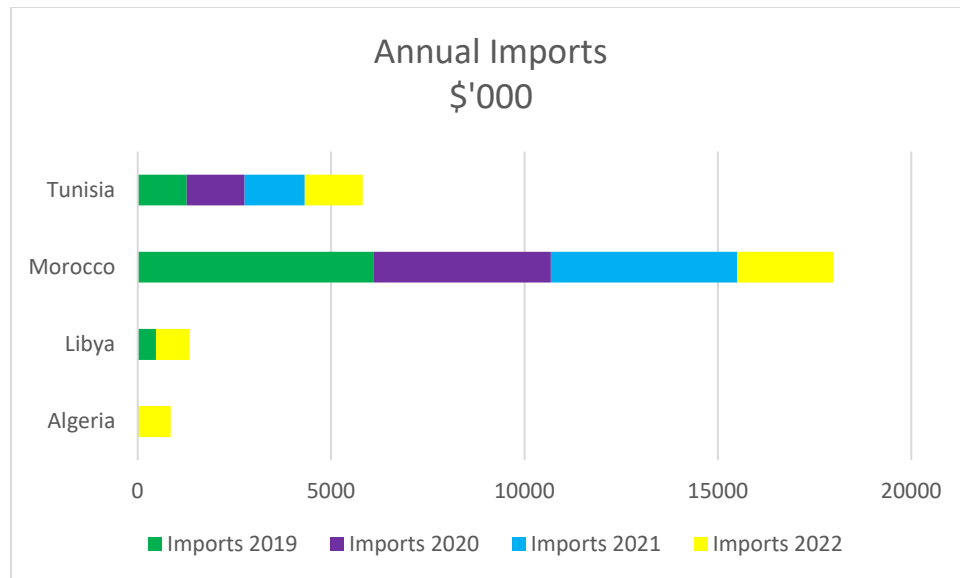


Figure 1: Import value of Northern Africa by country from 2019 to 2022

Algeria

The country's cultivated forage land area within North Africa is the lowest, valued at 53,000 hectares. Algeria, therefore, is largely an importer of forage crops importing a total of \$852,000 in 2022. Import partners were Italy (\$845,000) and Spain (\$6,320) with Italy being the fastest growing import markets at a rate of 41.89%. Algeria also exports forage crops and its exports for 2022 amounted to \$78,300. The country's main export destination were United Arab Emirates (\$64,600) and Qatar (\$13,700) which were both the fastest growing export markets, growing at 1% each. Imports of forage crops into Algeria from the EU increased to 39.5% between 2021 and 2022. Common forage crops include maize, wheatgrass, oats, alfalfa and sorghum.

Egypt

Due to the peculiarity of the climatic conditions of Egypt, most farmers simply adopt forage mixtures to boost their forage productivity per unit area. Common examples of forage mixtures in Egypt are (Awaad et al., 2018):

- Sudan grass–cowpea
- fodder maize–cowpea
- fodder maize–guar
- ryegrass–clover
- barley–clover
- canary grass–clover.

Apart from the above, *Trifolium alexandrinum* (Egyptian clover or berseem) is the predominant species. Egypt is a net exporter of forage crops, exporting \$54.1million as of 2022, making Egypt



the 10th largest exporter of Forage Crops in the world. The main destinations of their forage products are United Arab Emirates (\$41.8M), Kuwait (\$5.91M), Saudi Arabia (\$3.04M), Qatar (\$1.35M), and Jordan (\$1.04M). In 2022, the country imported approximately \$29.5M worth of forage crops, mainly from Australia (\$23.2M), Spain (\$2.52M), Chile (\$1.75M), Colombia (\$693,000), and France (\$639,000). The fastest growing export markets between 2021 and 2022 were UAE \$13.9M (49.9%), Kuwait \$3.83M (184%) and Saudi Arabia \$2.19M (256%) while the fastest declining export markets were Libya (-\$149K), China (-\$76.6K) and Andorra (-\$13.4K), each declining at a rate of 100%. Egypt faces export competition mainly from US, Australia and Spain.

Libya

Libya cultivates a total of 82,000 hectares of forage crops. It imports \$868,000 worth of forage crops from Spain. Spain therefore was its fastest growing import markets in Forage Crops for Libya between 2021 and 2022(\$167k).

Morocco

Morocco cultivates a total of 215,000 hectares, ranking as the second largest land area under cultivation specifically for forage crops in the region. In 2022, the country imported \$1.6million worth of forage crops, becoming the 55th largest importer of forage crops in the world whereas, the country only exported \$16,100 (OEC, 2024). The country largely imported from France (\$751,000), Spain (\$743,000) and Germany (\$106,000) but only \$109 from UAE. Its fastest growing import markets between 2021 and 2022 was Germany (\$89,100). The country is a net importer although they exported a total of \$16,100 in 2022. The main destinations of exports were France (\$7,270), Niger (\$7,030), Mauritania (\$1,740), and only \$20 from Italy. The fastest growing export markets for Morocco between 2021 and 2022 were France and Italy, each growing at 1%. On the other hand, the fastest declining export markets between 2021 and 2022 were Niger -\$1.76K (-20.1%), Belgium -\$1.6K (-100%) and Mauritania -\$1.35K (-43.6%). Common forage crops in Morocco are Corn (*Zea mays* L.), Soybean (*Glycine max* L.), Oat (*Avena sativa* L.), Berseem (*Trifolium alexandrinum* L.), Pea (*Pisum sativum* L.) and Triticale (x *Triticosecale wittm.*), Strawberry tree (*Arbutus unedo*), Tree Heath (*Erica Arborea*), Cistus salviifolius, C. monspeliensis, Lavandula stoechas, Myrtus communis, Common Olive (*Olea europaea* var. *sylvestris*), Green Olive (*Phillyrea latifolia*), Pistacia lentiscus, Quercus spp., and Wild blackberry (*Rubus ulmifolius*).

Tunisia

Livestock sector contributes over 40% to Tunisia's agriculture. Forage mixtures are the widely used practice by farmers to reduce the effects of soil erosion and land degradation. Forage seed production is favored over the use of green biomass and hay. In 2022, Tunisia exported \$17,600 worth of forage crops entirely to France whereas, it imported \$1.29 million primarily from Spain (\$1.27M) and \$23,500 from United States. The United States accounts for its fastest growing import markets while France was its fastest growing export market, although growing at only 1%.



Market Intelligence Update

This section focuses on Product, Price, Place, and Promotion as the four elements of a marketing strategy. This will provide US exporters with an overview of the target market and price products competitively with a special feature of Alfalfa in the region.

Product and Price

The focus in this section is on the retail price range for seven forage seeds in comparison with international prices in the forage seed industry. The reference international retail price used in this report is the USA pricing. The comparison is as of April 2024 and all comparison was on 1kg bag of the respective seeds. The regional countries included in this are five North African countries.

Table 2: Comparison of local and USA retail price range for seven grass seeds used for forage and fodder.

Seed	Country	Retail Price range \$	
		Local	USA
Alfalfa seeds	Algeria	0.97 - 4.84	7.72 - 15.43
	Egypt	16.72 - 24.59	
	Libya	1.91 - 7.64	
	Morocco	3.81 - 8.57	
	Tunisia	0.29 - 0.83	
Sugar beet seeds	Algeria	4.86 - 7.78	2.86 - 4.77
	Egypt	0.96 - 1.93	
	Libya	0.27 - 0.79	
	Morocco	3.94 - 6.89	
	Tunisia	0.67 - 4.97	
Clover seeds	Algeria	6.86 - 7.84	3.84 - 11.52
	Egypt	1.97 - 8.88	
	Libya	2.88 - 5.76	
	Morocco	0.95 - 4.77	
	Tunisia	5.97 - 10.59	
Kentucky bluegrass seeds	Algeria	9.83 - 15.72	2.94 - 10.79
	Egypt	10.75 - 24.43	
	Libya	7.75 - 13.57	
	Morocco	6.81 - 12.64	
	Tunisia	14.50 - 44.50	
Fescue Grass Seed	Algeria	3.84 - 6.72	3.94 - 7.88
	Egypt	0.05 - 0.14	
	Libya	2.89 - 8.68	



Timothy grass Seeds	Morocco	0.96 - 2.87	6.92 - 9.89
	Tunisia	3.37 - 7.69	
	Algeria	1.91 - 4.78	
	Egypt	8.69 - 17.38	
	Libya	9.59 - 19.18	
	Morocco	0.82 - 4.01	
Ryegrass Seeds	Tunisia	0.07 - 0.20	9.86 - 12.82
	Algeria	0.14 - 0.24	
	Egypt	4.82 - 8.68	
	Libya	0.68 - 7.82	
	Morocco	5.77 - 7.70	
	Tunisia	2.42 - 6.06	

Source: [2024 Prices, Trends & Insights | Food & Agriculture Statistics \(selinawamucii.com\)](#)

*Greatest trade potential

Table 2 above shows the retail price range for some forage seeds in North Africa in comparison with the US retail prices. This comparison is relevant to USA exporters so that they may target the countries in this region with the most favorable price ranges. Each forage seed's best price varies as each has the strongest trade potential in varying countries within the region. Overall, Egypt has very great trade potentials in Timothy, ryegrass, Kentucky bluegrass and alfalfa. In summary, four countries within the region have the greatest trade potential for the seven forage seeds. Egypt (alfalfa and ryegrass), Algeria (sugar beets), Tunisia (clover and Kentucky bluegrass) and Libya (fescue and Timothy grass). Kentucky bluegrass has the most favorable retail price within the region, the remaining six seeds, however, also have very good sales potential. The greatest efforts can be made to direct outreach to the countries and the grass seeds with the most favorable price range.

Alfalfa production and import is largest in Egypt. Egypt exported a total of \$21.2million of alfalfa in 2022 and imported only \$2.52million. Tunisia closely followed Egypt in the import of alfalfa, totaling \$1.27million. While Egypt is a net exporter, it is a large importer of alfalfa and has a very favorable retail price for the product. Within the region, Egypt and Tunisia should be the target of US exporters of alfalfa.

Updates on Relevant Market Changes.

Developments in the market

North Africa's peculiar arid nature makes it very different from the rest of Africa. It is continuously a challenge to maintain and improve the animal feed sector. The livestock sector accounts for the largest demand for animal feed. Forage is gaining traction as the most suitable animal feed amidst low water supply and arid conditions. This is a potential opportunity for US forage seeds export to fill by providing access to seeds suitable for arid areas while balancing environmental sustainability. The section below highlights noteworthy developments, which prove crucial to



prospective US exporters in this industry, seeking to expand into the seed sector in North Africa. The following developments highlight opportunities that are relevant in penetrating the North African seed market.

Promoting Multipurpose Forage Crops – Due to the peculiarity of the vegetation and climate of North Africa, certain forage crops that can serve multiple purposes are promoted. The International Center for Agricultural Research in the Dry Areas (ICARDA) focuses on forage crops and straws such as barley (which can be used both for human and livestock consumption, and even in brewing industry) as well as annual medics (like legumes), vetch (such as grasses), and spineless cactus, which are drought-resilient and water-efficient multi-purpose crops.

National Strategy for Advancing Feed and Forage in Tunisia – ICARDA and Tunisian key partners: the Bureau of livestock and pastures (Office de l’Elevage et des Pâturages), and the Institution of Agricultural Research and Higher Education (IRESA) developed a strategy to promote and upgrade the animal feed sector by 2035. This includes promoting adapted varieties of vetch crops, small scale mechanization for forage seeds, toolbox for rangeland assessment and management, as well as flexible grazing of rangelands.