



Office: Africa
For the Month of May 2024
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Executive Summary

Overview of the market

North African countries had substantial production of dried dates, apricot and prunes from Egypt and Algeria. Egypt is the region's largest exporter while Algeria is the largest importer as of 2022. The 2021 consumption of dried fruits were highest in Egypt (dates - 139,367MT and apricots – 2,474MT) and Algeria (dried plum/prunes - 4,381MT). These consumption levels signify the demand for these products in the respective countries. Dried apricots and figs have the strongest retail prices in the region. While traditional dried fruits like apricots, dates and raisins remain the popular preference in the region, there are opportunities to supply exotic ones like cranberries. Perhaps these exotic ones can be introduced, in the form of mixed fruit options. Demand for dried fruits within the region are primarily driven by cultural and religious preferences, production and processing practices as well as health consciousness and consumer preferences.

Production

The dried fruits typically form part of edible fruits, nuts and fruit peels and includes assorted dried fruits, dried prunes, dried apricots, mix of nuts and preserved fruits as well as dried apples. The focus of this report is primarily dried fruits. Egypt is the region's highest fruits producer as well as the highest exporter of dried fruits. Notable dried fruits production in 2023 were dried dates, dried apricots and dried prunes. These dried fruits had their highest production in Egypt (145,000MT of dried dates and 2,474MT of dried apricots) and Algeria (dried plum/prunes - 4,381MT) (INC International Nut and Dried Fruit Council, 2023). Top fresh fruit production were dates (highest in Tunisia), oranges (highest in Egypt) and grapes (highest in Morocco) and their respective total production values in the region were \$451.322million, \$1.676billion and \$3.957billion, in 2022. These three jointly formed approximately 34.89% of the region's total fresh fruit production. A few notable producers of dried fruits in the region are shown in Figure 1 below:



Figure 1: Top dried fruit producers in Northern Africa

Trends

Trends within North Africa's fruit and nuts industry are relevant to US exporters, to give insights into the region's preferences and current developments. It is also useful in targeting products, fruits and countries with favourable demand. These trends also give an understanding of the factors that drive the demand within the region.

Healthy snacking and culinary innovation

The use of dried fruits in the food and beverage industry is rapidly increasing. Popular trends in the use of dried fruits in North Africa include plant-based confectionaries (including cakes), popsicles, fruit puree for children and dairy alternatives for desserts (including ice cream and yoghurt).

Sun drying method is favoured

Due to the wealth of sunlight in the Northern African region, the traditional sun drying method is the predominant method of producing dried fruits. Another common method is also the use of special drying rooms equipped with fans and heaters.

Cultural and religious preferences

Certain fruits are peculiar snacks and food for religious and cultural festivities in the region. This indicates peaks in demand around religious festive seasons. For instance, dates and figs (also used as sweeteners in desserts) symbolize abundance and fertility.

Regenerative practices in Northern Africa

The Fruit Preparations business unit of one of the popular companies in the region, AGRANA (with presence in Algeria, Morocco and Egypt), in 2020/2021 launched a project on regenerative agriculture in the cultivation of fruits, with specific guidelines towards the implementation of these practices for soil crops (e.g., strawberries), bush fruits (e.g., blueberries and raspberries) and tree fruits (e.g., peaches). The implementation of this is shown in Figure 2 below:



Effects of implementing the framework

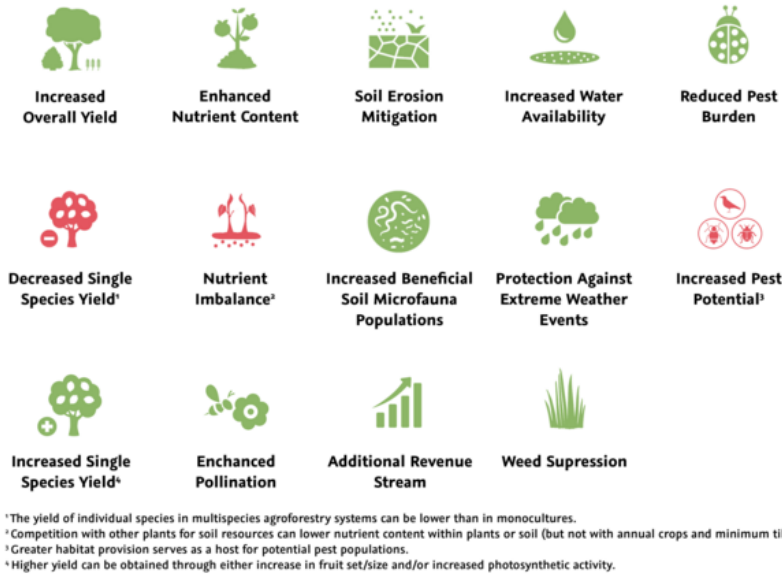


Figure 2: Regenerative farming practices
Source: AGRANA Fruit

Northern Africa Dried Fruits Market by Country

Egypt is the region’s largest exporter with an export value of \$57.7million while Algeria is the largest importer with an import value of 19.6million (Figure 3).

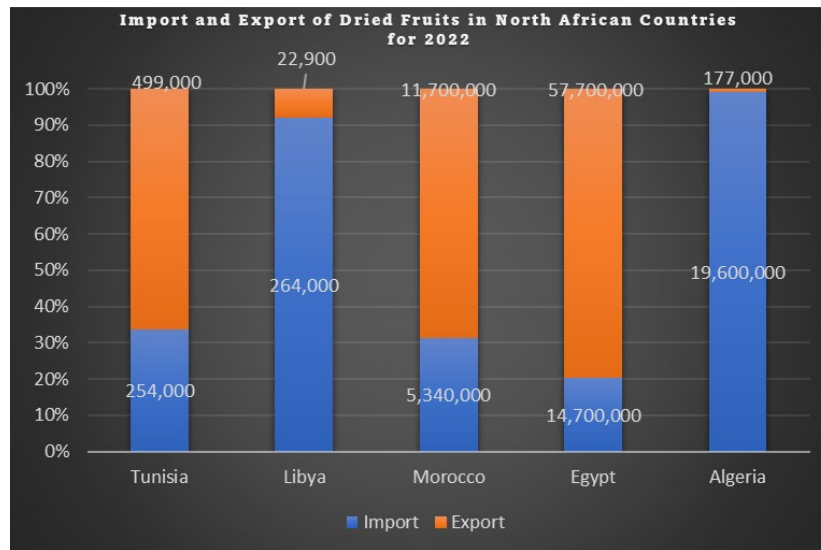


Figure 3: Import and Export of Northern Africa in 2022

Algeria

Algeria produces a total of \$9.079 billion worth of fruits in 2022. Dates emerged as the fruit with the highest production value in Algeria from 2018 to 2021 (Figure 4). The country



produced \$15.11 billion worth of dates in 2021 which was a decline in production from the 2019 value. Algeria's fruit production is not sufficient to feed its local demand and its export market. Algeria, therefore, imported \$19.6million worth of dried fruits in 2022. There are market opportunities for dried figs in Algeria as its local and fresh production is relatively lower to dates. Common fig varieties found in Algeria include Black Mission, Brown Turkey, and Calimyrna. The consumption of dried dates in Algeria amounted to 99,354MT in 2021.

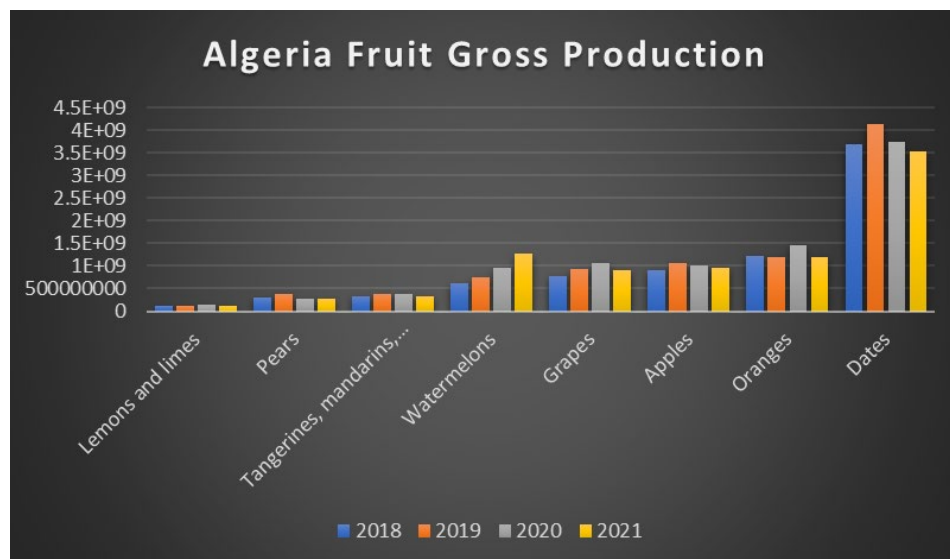


Figure 4: Fruit production in Algeria from 2018 to 2021

Algeria imported dried fruits primarily from Europe as shown on Table 1 below. The fastest growing import markets of Algerian dried fruits between 2021 and 2022 were Argentina (\$2.51M), France (\$1.12M), and Chile (\$1.12M).

Table 1: Algeria's dried fruit import origin and export destination in 2022

Import origin	\$'000	Export Destination	US Dollars
France	7,600	Germany	148,000
Türkiye	5,370	Slovakia	10,900
Argentina	2,510	Luxembourg	10,700
Chile	1,170	Mongolia	2,680
Uzbekistan	881	France	2,510

In 2022, Algeria's main importing competitors in dried fruits were: United States \$398M, China \$342M and Germany \$273M. In 2022, Algeria exported a total of \$177,000 dried Fruits. The main destination of dried fruits exports out of Algeria was mostly Europe. The fastest growing export markets for Algerian dried fruits between 2021 and 2022 were Germany (\$134k) which grew at 920%, Mongolia (\$2.68k) which grew at 1%, and France (\$2.31k) which grew at over



1,100%. The country's fastest declining export markets between 2021 and 2022 were Türkiye -\$213k (-100%), Slovakia -\$64.1k (-85.5%) and Czechia -\$1.28k (-97.9%).

Egypt

Egypt produced a total of \$70.63 billion of fruits in 2022. Orange was generally the largest produced fruit from 2018 to 2022 with a 2022 value of approximately \$1.28billion (Figure 5). Watermelon was also produced significantly in 2022 to a value of \$1.26 billion. Cantaloupes and other melons, dates, figs, peaches and nectarines as well as plums and sloes faced difficult production seasons from 2019 till 2022 as no production was recorded. Common dried fruits produced in Egypt include strawberries, artichokes, olives and apricots. Egypt maintained rank as the highest consumer of dried dates in the region and in Africa amounting to 139,367MT as of yearend 2021.

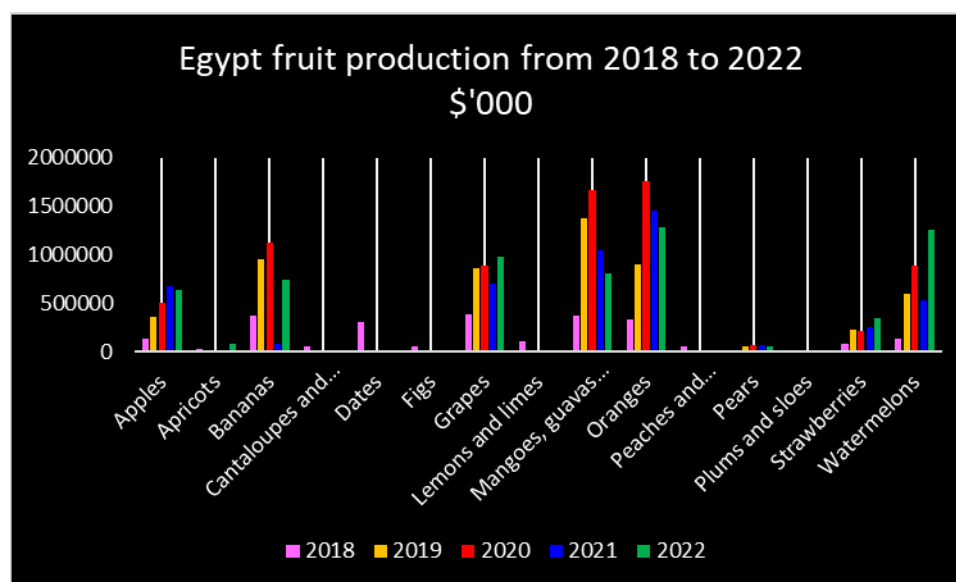


Figure 5: Fruit production in Egypt from 2018 to 2022

In 2022, Egypt exported a total of \$57.7million dried fruits from the countries on table 2 below. The country's fastest growing export markets between 2021 and 2022 were United States (\$13.9M) (38.4%), United Kingdom (\$4.3M) (257K%), and Canada (\$1.13M) (115%). The fastest declining export markets were Slovakia -\$661k (-97.5%), Germany -\$250k (-27%), Türkiye -\$157k (-100%) from 2021 to 2022. In 2022, Egypt imported \$14.7million of dried fruits primarily from the countries on the table above. The fastest growing markets between 2021 and 2022 were Bulgaria (\$1.41M), Nigeria (\$97.4k) and Syria (\$83k).

Table 2: Egypt's import origin of dried fruits and export destinations in 2022



Export Destination	\$'000	Import Origin	\$'000
United States	50,100	Türkiye	7,920
United Kingdom	4,300	Argentina	1,470
Canada	2,120	Bulgaria	1,410
Germany	675	Morocco	1,250
Morocco	271	India	1,200

Libya

In 2022, Libya imported \$264,000 of dried Fruits. Libya imports were primarily from Table 3 below. The fastest growing dried fruit import markets between 2021 and 2022 were Italy (\$13.7k), United Arab Emirates (\$5.74k), and Netherlands (\$159). Libya recorded a total export worth approximately \$22,900 in 2021. The fastest declining markets for the export of dried fruits by Libya were (N/A - 2021) Indonesia -\$22.9K (-100%), Netherlands -\$45 (-100%).

Table 3: Libya's import origin of dried fruits in 2022 and export destinations in 2021

Import origin	\$	Export destination	\$
Türkiye	241,000	Indonesia	22,900
Italy	13,700	Netherlands	45
UAE	5,740		
France	2,860		
Netherlands	1,220		

Morocco

The Moroccan fruit production declined by approximately 30% from 2021 to 2022. The total fruit production value in 2022 was \$72.06 million. Grapes ranked the highest in production value with over \$2billion in 2022 (Figure 6). Pears had the lowest production value in 2021 and 2022.

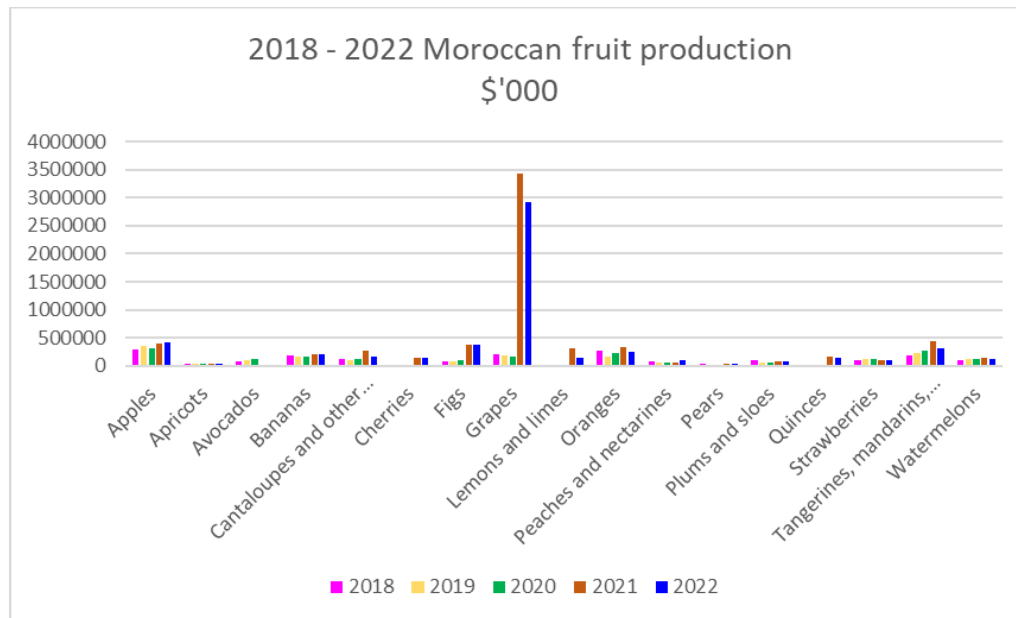


Figure 6: Fruit production in Morocco from 2018 to 2022

Morocco exported \$11.7million dried fruits in 2022. The fastest growing export markets of dried fruits for Morocco between 2021 and 2022 were United Kingdom (\$1.09M), Algeria (\$235k), and Canada (\$200k). The country imported \$5.34million dried fruits. The fastest growing dried fruits import markets between 2021 and 2022 were Türkiye (\$1.29M), Spain (\$829k), and Moldova (\$259k). The countries of import origin and export destinations are outlined in Table 4 below.

Table 4: Morocco's import origin of dried fruits and export destinations in 2022

Import Origin	\$'000	Export Destination	\$'000
Türkiye	3,160	United States	7,130
Spain	1,030	Egypt	1,250
Egypt	271	United Kingdom	1,110
Moldova	259	Algeria	681
Uzbekistan	209	Canada	627

The fastest growing dried fruits export markets for Morocco from 2021 to 2022 were United Kingdom \$1.09m (7.37k%), Algeria \$235k (52.8%), Canada \$200k (46.9%). The fastest declining markets for the export of dried fruits by Morocco in 2021 and 2022 were United states -\$4.45m (-38.4%), Spain -\$2.53m (-92.7%) and Egypt -\$396k (-24.1%).



Tunisia

Fruit production in Tunisia for 2022 was approximately \$1.22 billion. Dates was the highest produced fruit in the country, followed by oranges. Dates experience a consistent increase in production from 2019 to 2022 (Figure 7). There is generally low production in quinces, figs, pears, strawberries, plums and sloes. Approximately 84,153MT of dried dates were consumed in 2021 and this shows that the market for dates is significant.

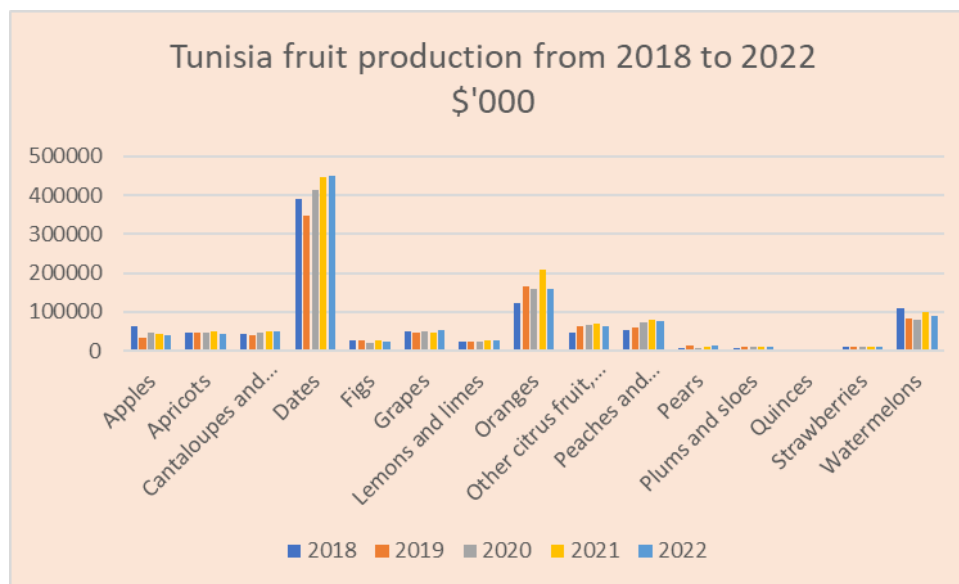


Figure 7: Fruit production in Tunisia from 2018 to 2022

Tunisia exported a total of \$499,000 dried fruits in 2022. The main destinations of these exports are shown on Table 5 below. The fastest growing export markets between 2021 and 2022 were Germany \$152,000 (3.16K%), Malaysia \$83,500 (1%), and United Kingdom \$51,300 (1%) while the fastest declining export markets were Libya -\$51,500 (-100%), Thailand -\$35,000 (-100%) and Czechia -\$15,900 (-23.1%). On the other hand, Tunisia imported a total of \$254,000 dried fruits. Imports origins are shown in the table below. The fastest growing import markets in Dried Fruits for Tunisia between 2021 and 2022 were Chile (\$39.2k), Serbia (\$10.4k), and United Kingdom (\$1.98k).

Table 5: Tunisia's dried fruit import origin and export destination in 2022

Import origin	US Dollars	Export Destination	US Dollars
Türkiye	170,000	Germany	157,000
Chile	39,200	Malaysia	83,500
Morocco	22,700	Czechia	52,700
Serbia	10,400	United Kingdom	51,300
France	9,650	United States	30,900



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 average retail price range for dried fruits in comparison with international prices. The reference international retail prices used in this report are the USA pricing. The comparison is as of June 2024 and all comparison was on 1kg bag of the respective dried fruits.

Table 6: Comparison of local and USA retail price range for Northern Africa's popular dried fruits.

Dried Fruit	Local \$ retail price	USA \$ retail price
Apricot	14.84	7.66
Dates	3.68 - 5.50	5.75
Figs	8.09	7.32
Grapes	0.87 - 1.50	3.99

Sources:

The Maghreb Times -May 29, 2024 <https://themaghrebtimes.com/algeria-the-leading-producer-of-apricots-in-africa-will-prices-finally-collapse/>

[Dried Grapes Prices – Historical Graph \[Realtime Updates\] \(procurementtactics.com\)](#)

CEIC Data 2022 - <https://www.ceicdata.com/en/algeria/average-price-of-food-products/average-price-of-product-dry-fruits-dates-cluster-deglet-nour>

Statista 2024 <https://www.statista.com/statistics/1262404/average-price-of-dried-fruit-in-algeria-by-type/>; Tunisia: price of fresh and dried fruits 2020-2021 | Statista

USDA 2024 [USDA ERS - Fruit and Vegetable Prices](#)

Table 6 above shows the retail price range for some dried fruits in North Africa in comparison with the US retail prices. This comparison is critical information as it would help USA exporters focus on the dried fruits with the most favourable prices. Dried apricots and figs have the most favourable retail prices in the region as their prices exceed the US retail prices. The price of dried figs has been relatively stagnant for the past three years although it is overall a favourable price. Dried apricots have the most favourable price in the region and is, therefore, the dried fruit with the greatest trade potential. The price of grapes in the region is generally very low. The price ceiling of dates is relatively lower than that of the US retail price but is a fair price. Based on pricing, trade efforts can, hence, focus on figs and apricots in this region.

Updates on Relevant Market Changes.

Developments in the market

North Africa has a significant production level of fresh and dried fruits on the African continent. Their strength lies in such products that can be produced given the uniqueness of the



environmental and climatic conditions. Some dried fruits are highly produced while some face production challenges. Dried fruit is generally an export product of notable North African countries and is a staple food in the region. US dried fruit exporters have the opportunity to supply target dried fruits that are of lower production size and significant demand. The section below highlights noteworthy developments, which are critical for consideration to potential US exporters of dried fruits looking for entry into the North African dried fruit market. The following developments highlight opportunities that are relevant in North Africa's dried fruit market penetration.

Morocco imports expected to hit new record – Morocco's imports of dried fruits are expected to hit record high by the end of 2024. Morocco's imports of less popular categories of nuts and dried fruits, including Brazil nuts, pistachios, hazelnuts, and dried apricots is rapidly growing.

Algeria's food price inflation ease in 2024 – Food inflation increased in Algeria by the ending of 2023 but decreased significantly from 7.2% in January 2024 to 3.7% in February 2024. The general outlook and expectations for the rest of 2024 is that food inflation reduces as global commodity prices also fall.

Tunisia citrus industry is threatened by Citrus Black Spot – The fungal Citrus Black Spot (CBS) disease was first detected in 2019 but has continued to spread around citrus orchards in Tunisia with noteworthy economic implications. This has raised significant export challenges as the country is faced with phytosanitary restrictions.