




Market Situation in North Africa

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Who are we?



ATLAS AGRO is a Swiss company assembling internationally recognized experts in the field of integrated crop management and biological protection.

Our focus is on developing and marketing sustainable solutions for crop protection, forestry, apiculture and public hygiene.

ATLAS AGRO:

Agribusiness Offer

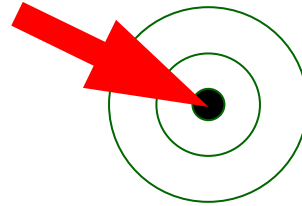


Technologies, Registered Products

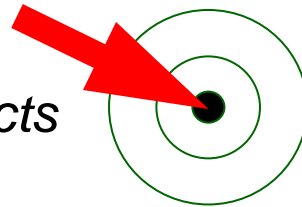
Inputs

- (Seeds)
- Fertilizers
- Diagnostic Tools
- Crop Protection Products

Harvest Protection Products



Grower



Post-Harvest



Consumer

Services

- Training
- Monitoring
- System update
- Certification
- Promotion

Norms, Standards

National

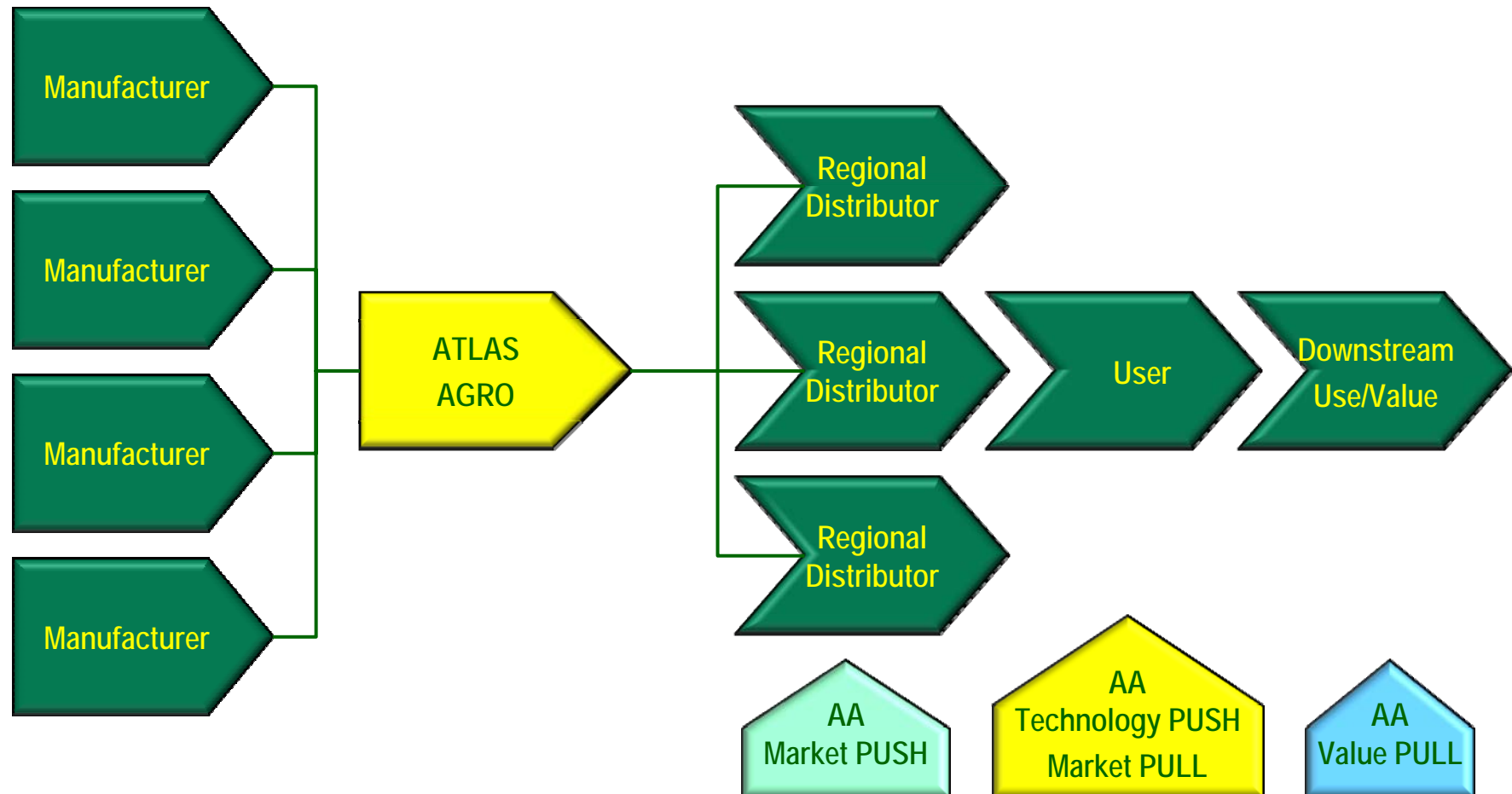
Export

Transformation

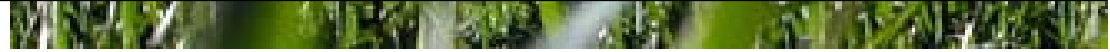


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Biocontrol & Pest Management



North Africa Profile



- > **Population:** 160'727'305
- > **Area (km2):** 5'752'889
- > **GDP (current US\$) (billions) (2008)**
 - > Marrocco: 86.3
 - > Algeria: 173.9
 - > Tunisia: 40.2
- > **GDP /Agriculture**
 - > Marrocco: 15.7%
 - > Algeria: 8.3%
 - > Tunisia: 10.5%

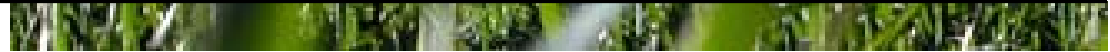
Classical Agriculture /Organic Farming



Countries	Agriculture Area (1 000 Ha) (2007)	Organic Farming area (%)
Morocco	29'960	-----
Algeria	41'252	-----
Tunisia	9'826	1.7%
Egypt	3'538	0.4%

Source: FAO and IFOAM

Important Crops



	Wheat	Vegetable Crops	Date Palm
Morocco	1'370'000 ha	90'900 ha	
Algeria	2'873'613 ha	353'992 ha	159'817 ha
Tunisia	1'500'000 ha	245'000 ha	35'000 ha

Crop Protection Market in North Africa



In 1000 EUR	Insecticide	Fongicide	Herbicide	Others	Total
Morocco (2008)	17'500	25'800	13'000	18'000	74'300
Algeria (2007)					32'000
Tunisia (2008)	4'905	5'142	4'462	956	15'465

- So far the market practices are not at a very intense level, in particular in Algeria
- This is a great opportunity for introducing modern and safe products and technologies

Current Market Concerns in North Africa



Crops /Market	Insect	Disease
Citrus (+++)	Fruit Fly	
Olive (+++)	Olive Fly	Verticilliosis
Date Palm (+++)	Carob Moth/Mite (Field & Storage)	
Tomato (+++)	Ex. Tuta absoluta	Virus
Wheat (++)	Aphids	Ex. Septoriosis, Oidium
Vine grapes	Lepidoptera, aphids, trips	Downy mildew
Appel/Pears/ (++)	Codling moth, aphids, trips	Scab

The present situation



Export Market

- > Positive, increasing trend
- > Private and Public sector
- > Concentrated on high value crops
- > Driven by
 - > increased European demand for organic products
 - > New orientation of the North African countries to increase their AG export

Domestic Market

- > Low value crops
- > No residue control
- > No effective legislation
 - > Registration
 - > No control on the market
- > Lack of Know How for IPM and Biocontrol methods

⇒ Quality and Value will be driven by the export customer

Perspectives and opportunities for Biocontrol Agents



- > New orientation and new developpement programmes to foster export market (BIO and GAP certification)
 - > Algeria: PNDA, PDDR
 - > Marooco: Plan Maroc vert (PMV)
- > New orientation of North Africain countries for Pesticide Registration
- > Increase of demand for BCA in these countries

⇒ **Increased awareness
and**

⇒ **Demand increase for BCA in these countries**

What shall/can IBMA do?



- > To come closer to this market
- > To play a role in the legislation/regulation process
- > To actively communicate the value of modern crop protection to all stakeholders

⇒ **Creation of a Middle East/North Africa IBMA group (MENA IBMA)**

MENA IBMA Group



- > Participants
 - > Manufacturers with active product promotion in these countries
 - > Local Agents and Distributors with technical expertise
- > Activities
 - > To send delegates to any legislative/regulatory initiative
 - > Communication to target audiences: growers, officials, public
 - > Participation to training sessions
 - > Collaboration with extension offices and research institutes on specific themes (e.g. *Tuta absoluta*)

Interested to participate?

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