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Analysis of the evolution of the oilseed sector through various economic reforms in Algeria: A longitudinal study from 1962 to the present day

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Summary

The oilseed sector (oils), like other sectors of the agri-food industry, has undergone several restructurings since our country's independence.

The purpose of this paper is to explain the various transformations undergone by the oilseed sector in Algeria since independence to the present day, using a qualitative longitudinal analysis based on a chronological matrix (Miles and Huberman 2003), which has enabled us to identify seven **(06)** sequential periods and analyze the structure of the sector in question through a temporal breakdown of the phenomenon studied.

The main results highlight the costs generated by table oil subsidies in Algeria, which continue to weigh heavily on public finances (108 billion dinars in subsidies in 2003) and on the country's food trade balance (third largest importer of soybeans in the world in 2023).

Keywords: sector, oilseeds, restructuring, nationalization, privatization
JEL codes: O 14, Q13

Introduction

Oilseeds are plants grown specifically for their seeds or fruits, which are rich in fat. The oil is extracted for food, energy, or industrial use through a process called crushing, in which the seeds are ground and pressed, leaving a by-product called oilseed meal, which is generally recycled into animal feed.

Global production of these seeds is estimated at 453 million tons in 2024, consisting mainly of soybeans, rapeseed, and sunflower seeds (FAO, 2015) . Algeria, like many countries around the world, imports increasing quantities each year to meet the needs of its population for this product, which is considered a staple food and benefits from state subsidies.

Since the country gained independence in 1962, the government has been determined to control seed imports and local oil supplies, given the strategic importance of this sector for the population. This determination has been demonstrated through the nationalization of French interests (Lesieur Algérie and UNIPOL) and the creation of ONACO (Office national de commercialisation) and SNCG (société nationale des corps gras), which became ENCG (entreprise nationale des corps gras) in 1982, until the privatization of these production units in 2007/2008.

The maintenance of a state monopoly on the sector (1962-1998) created a significant imbalance that accentuated dependence on foreign markets, making Algeria one of the largest importers of oilseeds (mainly soybeans).

The effects of the structural adjustment plan (1994), accompanied by the shock of economic liberalization, exacerbated the difficulties facing the sector, prompting the public authorities to open it up to private initiative from 1998 onwards. This opening up accelerated during the period 1999-2019 through the privatization of the ENCG's public production units and the domination of the

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sector by large private national groups (CEVITAL and Kou GC) and foreign groups (the Saudi group SAVOLA, owner of the Afia brand), which have been present on the national market since 2008.

However, despite these strategic choices made by the state in favor of private initiative, the expected results did not meet the expectations of the country's economic and political authorities. As a result, the imbalance not only persisted, but also led to repeated episodes of market shortages (2010, 2019, 2022), exacerbated by the inability to control and regulate distribution channels. This prompted the state to recover private units previously sold to private operators and transform them once again into public units, such as the table oil production units of the Kou GC group in the wilayas of Jijel and Mostaganem.

This return to nationalization has been accompanied by institutional measures targeting certain private agri-food groups, such as the SIM and DAHMANI (la belle) groups, which the authorities have asked to set up oilseed crushing units, and the CEVITAL group's , which has just installed new crushing capacity in line with its integration strategy pursued for several years.

These figures show how the lack of vision and inconsistent strategic choices that have led to the failure of the various reforms carried out in this sector are compromising the government's goal of achieving self-sufficiency in oilseed production by 2023 (through the planting of 45,000 hectares of rapeseed and sunflower) and to make Algeria an oil-exporting country by 2027.

This paper is structured in a standardized format, allowing us to clearly communicate the results through an introduction, a description of the methods used, a presentation of the results we have achieved, and finally an analysis and interpretation of the results accompanied by a summary conclusion.

2-Methodology

In this research paper, we have adopted a qualitative, inductive approach, the objective of which is to explore and respond to the researcher's initial intention by proposing innovative theoretical results, i.e., to create new theoretical links between concepts and/or integrate new concepts into a given theoretical field (Thietart, 1999) , initially conveyed through secondary data, which offers control over internal validity thanks to its availability. This approach allowed us to benefit from greater flexibility in data collection (Wacheux, 1996) .

In a second stage, to analyze and interpret the data collected, we opted for qualitative longitudinal analysis, which allows us to understand dynamics and evolution over time. *Qualitative* research can result in impressive quantities of documents, which may take the form of transcripts of observations, documents collected in relation to the phenomenon under study, press clippings, etc. All this data cannot be analyzed immediately: it must first be processed so that it can be used for further analysis.

Once this work had been completed, we took care to write a monograph that outlined in some detail the evolution of the oilseed sector in Algeria from 1962 to the present day. This gave us a cross-sectional and comprehensive view of the phenomenon under study, reducing the amount of information previously processed (Eisenhardt, 1989) by establishing links that allowed us to connect events while respecting their chronological order.

Finally, to better understand the work carried out, we have set up a chronological matrix (Miles & Huberman, 2003) which presents data on the various restructuring processes undergone by the oilseed sector in Algeria, establishing a temporal relationship between the different phases.

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To construct this chronological matrix, we first focused on the specific aspects of the phenomenon under study, i.e., the role of public authorities in the management of this sector (online), which has always been considered a strategic sector for the state as part of its industrial strategy for the agri-food industry.
The columns represent successive periods of change, i.e., the breakdown of the analysis period into sub-periods or successive stages of change.
The intersection between the line and the column highlights the changes that have taken place in the sector over the period studied.
The following table shows the chronological matrix of the oilseed sector in Algeria over the period 1962-2024.

Evolution of the sector	**1962**	**1969**	**1982**	**1988**	**1998**	**2019 to present**
Role of public authorities	Emergence of the sector	Industrialization policies	Maintenance of the monopoly	P.A.S. and reduction in subsidies	Withdrawal of the state	Return to nationalization
Impacts on the sector	State consolidation through nationalization	Fragmentation of the sector	Increased foreign dependence	Opening up to private initiative	Dominance of the sector by private operators	Attempts at integration and market regulation

Source: compiled by us

3- Results:

In relation to the research objective we set out and taking into account the role played by the state in establishing the sector and the various restructuring measures that have impacted its structure and operating logic, as well as the various statistical data we were able to gather through cross-checking, we have identified five (06) sequential periods:

3-1 Emergence of the oilseed sector in Algeria: sovereignty and nationalization (1962-1968):

This first period coincides with the creation of the first measures put in place by the State in the aftermath of the country's independence in order to exercise control over the sector. These objectives were manifested by the creation of the ONACO (National Marketing Office) in 1964, to which the public authorities granted exclusive rights to import oilseeds and crude oils for local refining (Bouras, 2005) .
Another significant event during this period was the creation of the SNCG (Société Nationale des Corps Gras) on August 9, 1967, following the nationalization of French interests (Lessieur and Unipol) in order to mark a break with colonial policy (Benhamou, 2010) .
It should be noted that there was a crushing industry in Algeria before 1962, but this declined between **1963 and 1968 from 80,000 tons to 64,000 tons**, with almost exclusive crushing of rapeseed, 40% of the refined oils coming from local crushing (Boukella, 1992) .

3-2 Industrialization policies and fragmentation of the sector (1969-1982):

From 1969 onwards, new prospects opened up for the oilseed sector in Algeria as part of new industrial development policies. However, the lack of synergies between the country's agricultural

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development and its industrial development did not have the desired effects, in a context marked by increasing consumption needs of a growing population, requiring the importation of larger quantities of seeds (Bennoune, 1988) .

This period was also marked by fragmentation of the sector and the dissolution of the SNCG in October 1973, which was replaced by the creation of SOGEDIA (société de gestion des industries agro-alimentaires), responsible for table oil production.

It should be noted that seed production rose **from 95,280 tons in 1972 to 238,000 tons in 1982** (a growth rate of 100% with seeds almost exclusively imported) (Chikhi S., 1991) .

In addition, this period was characterized by (Talahite, 2000) :

- The creation by the State of industrial units that increased refining capacity at the expense of crushing, which was definitively abandoned;
- The granting of significant global import authorizations to SOGEDIA, making it a major player in the international oilseed import market;
- Accentuated the break with the agricultural sector, leading to a disconnect between the agricultural sphere upstream of the industry and the productive and commercial spheres downstream.

3-3 Maintenance of the state monopoly and increased dependence (1982-1988):

This stage was marked by the entry into force of the first five-year plan (Brahimi, 1991) , which was characterized by attempts to reorganize the country's economic situation through the rationalization of investments, which first required approval from the Ministry of Planning (Dahmani, 1999) , and a redefinition of resource allocation in favor of the social sectors.

These reforms (Ourabah, 1990) had a significant impact on the agri-food industry in general and the oilseed sector in particular through:

- The creation in December 1982 of the SNCG (national fats company) following the restructuring of SOGEDIA;
- Vulnerability of the sector and worsening deficits, with SNCG imports accounting **for** an average **of 12% of** the country's food **imports**;
- The cancellation of several investment projects for the development of the sector (such as the Bejaia and Maghnia refinery projects, which had been on the agenda since 1976) following the government's new policy;
- The closure of the last seed crushing plants, which turned Algeria into a net importer.

3-4 The onset of the crisis in the sector, the withdrawal of the state and the opening up to private initiative (1988-1998)

From 1986 onwards, following the oil shock (Bouzidi, 1988) , which had a detrimental effect on the structures of the Algerian economy in general and the state of public finances in particular, the oilseed sector, like the entire industrial sector, entered a phase marked by structural problems that led to chronic shortages at a time when the state was withdrawing from price subsidies and the granting of general import authorizations (Dillman, 2000) .

Following the structural adjustment plan (1994) and the sharp devaluation of the dinar (1 dollar = 5 dinars in 1988) (in 1998, 1 dollar = 70 dinars), there has been a decline in the utilization rate of production capacity, which can be explained by constraints on the supply of raw materials due to the shock of devaluation (33% depreciation of the dinar in 1994) (Benissad, 1991) .

This loss of foreign exchange increased the ENCG's deficit with banks and its receivables from public distribution companies (400 billion cts in receivables) (Bouandel, 2003) .
Faced with this situation and with the aim of restoring the country's agri-food balance, the government decided to open up the sector to private initiative through the entry of the first national private operator, the CEVITAL group (Mebtoul, 2005) .

3-5 Withdrawal of the state and domination of the sector by private operators (1998-2019)

This policy of opening up the oilseed subsidiary to private initiative, which was initiated by the entry of CEVITAL in 1998, was stepped up from 2001 (Order 01/04 of August 20, 2001) (Bessaoud, 2016) , when the SGP (société de gestion des participations) TRAGAL decided to privatize the ENCG units (COGRAL Safia in the port of Algiers), which cover several hectares of the maritime , COGRO in the wilaya of Oran and the unit in the wilaya of Mascara, to the benefit of the Algerian private group KOUGC (resolution of the State Participation Council 14/125 of January 12, 2004) (Bourenane N., 2018) , the group in question benefited from a credit line of 120 billion dinars repayable over 15 years.

This operation marks the end of the state's presence as a producer/processor in a sector that it has always considered to be highly strategic in the agri-food industry (Kadri, 2019) .
The year 2008 saw the opening of this sector to foreign investment with the entry of the Saudi group SAVOLA into the market, setting up oil crushing and refining facilities in the wilaya of Oran, marketed under the Afia brand (Bourenane N., 2018) .

3-6 Return to nationalization and attempts to regulate the sector (2019-2024)

Starting in 2021, the State, through the public authorities represented by the relevant ministry, has decided to recover the edible oil production units previously privatized to the KOUGC group. Although this move is part of the transfer of assets seized by the courts to the public sector, it nevertheless marks a return to the previous course of action (Zerrouki A., 2017) .
This operation concerns the Safia factories belonging to the public agri-food group AGRO-DIV and the oilseed crushing unit in Jijel, which were transferred to the food subsidiary of the public group MADAR (Mouhoub A., 2018) . This involvement of the state in the management of this sector has been accompanied by institutional measures aimed at facilitating access for other private groups (such as the DAHMANI and SIM groups), which have also set up crushing capacities for seeds sold under the brands La Belle, Zitna, and Bahia (Zerrouki A., 2016) .
Finally, the public authorities have greatly contributed to the establishment of new crushing capacities by the private group CEVITAL, enabling it to consolidate its integration strategy through the production of the first 100% Algerian oil (Taleb, 2020) .
Since 2023, we have seen several attempts by the public authorities to put in place mechanisms to bring together the upstream sector, consisting of farmers, and the downstream sector, consisting of public and private crushing units.
Thus, during the 2022/2023 agricultural season (Iddir, 2025) , Algeria planned to devote more than 45,000 hectares to the cultivation of oilseeds (sunflower and rapeseed), with an expected yield of 20 quintals per hectare, given that the country has a total area of nearly 700,000 hectares suitable for rapeseed cultivation and more than 600,000 hectares for sunflowers, which will further increase the area allocated to oilseed crops (Imadalou, 2023) . Alongside these measures aimed at better integration of the upstream sector, other incentives have been introduced to create a favorable and encouraging climate for the development of local seed cultivation, through the agreement of several subsidies by the public authorities, such as production subsidies of 3,000 DA per quintal for

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individual farmers and pilot farms, with the subsidy in question increasing to 3,500 DA for farmers organized into agricultural cooperatives. In addition, an integration subsidy of 500 DA per quintal has been granted to processing units with contracts with producers to encourage them to introduce locally produced oilseeds for vegetable oil production (Bersali, 2024) .
The scheme also grants an oilseed storage premium of 200 DA per quintal to cereal and pulse cooperatives (CCLS) that have stored oilseeds delivered by producers (Amellal, 2025) .
For 2024, the same incentive scheme has been renewed with the aim of reserving 150,000 hectares for oilseed cultivation by 2026, with a projected production of 300,000 tons of sunflower seeds and 135 million liters of oil per year. These expected quantities would enable Algeria to reduce its imports.

3-7 Analysis of the evolution of domestic vegetable oil production compared to imports.

The table below shows the evolution of domestic vegetable oil production compared to imports.

	Local production of vegetable oils in thousands of tons	Imports of vegetable oils in thousands of tons
1962-1970	20 000	20 000
1970-1980	30 000	100 000
1980-1990	40 000	200 000
1990-2000	30 000	250 000
2000-2010	50 000	300 000
2010-2020	70 000	250 000
2020-2023	80 000	200 000

Source: compiled by us

Thus, we see that between 1962 and 1970, local oil production amounted to 20,000 thousand tons, while imports were practically equivalent.A partir des années 1970, la production est passée à 30 000 tonnes, alors que les importations ont pratiquement quintuplé, atteignant ainsi 100 000 tonnes.
The following decade saw local production reach an estimated 40,000 tons, but imports doubled to 200,000 tons in order to meet the growing demand of the domestic market.Les années 1990, ont marqué un recul de la production locale (30 000 tonnes) par opposition aux importations qui ne cessaient de croitre atteignant un volume de 250 000 tonnes.
As shown in the graph below, between 2010 and 2020, and as part of the national program aimed at developing the oilseed sector, oil production increased significantly (70,000 tons), while imports decreased slightly (250,000 tons).

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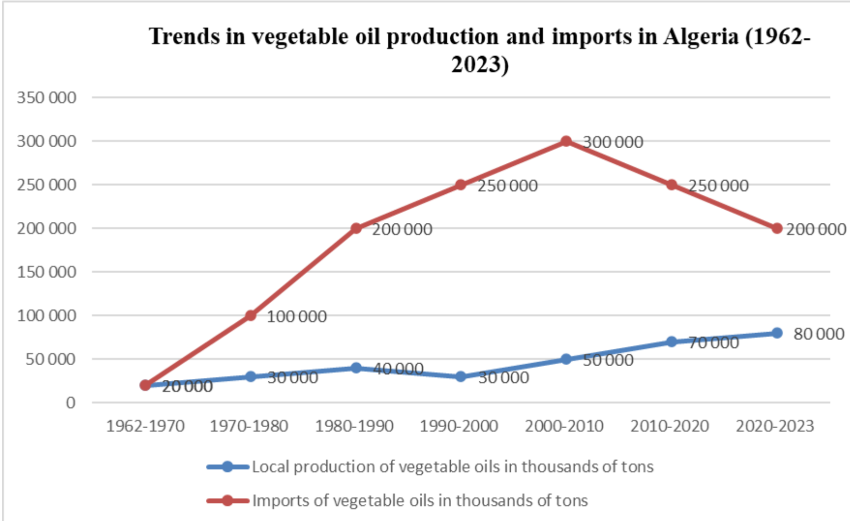

Source: compiled by us

Finally, from 2020 to 2023, production peaked at 80,000 tons and imports fell further (200,000 tons), suggesting a trend toward gradual self-sufficiency, as desired by the public authorities.

4- Discussion of results

Through the stages we have identified in this paper, we note the absence of a strategic trajectory for the management of the oilseed sector in Algeria since independence (first finding). This finding corroborates the work of (Boukella, 1992) , who asserts that the state is responsible for the "*disarticulation of the seed oil sector by neglecting the promotion of local oilseeds and abandoning all crushing activities on Algerian soil*" just a few years after the country's independence.

For his part, (Bouras, 2005) , referring to the same period (1962-1968), shows that the agricultural policies put in place had a negative impact on rural development and crop diversity in a context marked by ideological tensions between state and self-management approaches (Benhamou, 2010) .

This finding is also confirmed by the work of (Khaldi, 2012) , which highlights the disagreement between social and economic objectives and the difficulties associated with the transition from colonial agriculture to a socialist model favored by the authorities at the time, who were strongly confronted with various issues related to national sovereignty, particularly through agrarian reform and the nationalization of resources, making the agricultural sector in general, and the oilseed sector in particular, one of the key sectors for food self-sufficiency, despite a multitude of structural problems such as inefficient land management and lack of modernization (Zerrouki A., 2016) .

The following result highlights the failure and negative impact of industrialization policies on the oilseed sector in Algeria. According to Messaoudi (1990) , the industrialization policies adopted since the 1970s have been strongly marked by bureaucratic inefficiencies and a lack of innovation, which have prevented the country from integrating its industrial sector into the global economy. This can be explained by poor economic and political choices that guided industrialization, in particular the priority given to heavy industry and import substitution at the expense of industries likely to have a knock-on effect within and between sectors, such as the agri-food industry (Bourenane N., 1987) . Our findings are therefore consistent with the contributions of (Talahite, 2000) , who analyzed how dependence on oil revenues has hampered the country's endogenous industrialization process, highlighting the neglect of productive and strategic sectors and industries such as oilseeds and fats in favor of the redistribution of oil revenues.

In line with the previous finding, the maintenance of the state monopoly over the sector has reinforced dependence and imbalance, as confirmed by the analysis of (Mouhoub M., 1994) , which proposed more inclusive and effective economic governance of the industrial sector. According to (Bouyacoub, 1987) , this trajectory implies a profound reform of the industrial sector, including greater openness to the private sector, better governance, and investment in modern technologies. This result extends the work of (Ould-Aoudia, 1990) , who explored the dynamics of Algerian industry, emphasizing its dependence, which has limited the industrial autonomy of several sectors, such as oilseeds, which have remained dependent on imports to the detriment of endogenous industrialization and localization of the sector in the country through a higher degree of integration.

This approach was only possible thanks to the rent distribution system that was put in place to maintain social stability at the expense of productivity and profitability requirements, which were ignored for more than two decades (Addil, 1994) , the oil price shock beginning in 1986, which was exacerbated by the effects of the structural adjustment plan and the shock of economic liberalization (Hidouci, 1992) sounded the alarm bells that should have prompted the public authorities to end the policy of importing all oilseeds and move towards gradual integration, enabling the establishment of a genuine oil economy within the country. However, with the improvement of the country's macroeconomic indicators and the rise in oil prices from 2001 onwards, we saw the same scenario and the same trends that had marked the periods 1969-1982 and 1982-1986, namely the almost exclusive importation of oilseeds, liberalization of the agri-food sector, which led to limited growth and persistent regional inequalities (Bessaoud, 2016) , the domination of a single operator on the market (private, unlike the various public operators SOGEDIA, SNCG and ENCG) and the withdrawal of the state through a disengagement strategy involving the privatization of ENCG. This marginalization of public enterprises through transfers of ownership from the public to the private sector has accentuated the increased dependence on imports and the marginalization of local producers (Mouhoubi, 2015) as highlighted by (Boukhobza, 2012) : *"The liberalization of the agri-food sector in Algeria has led to greater instability linked to fluctuations in international markets and, therefore, to increased risks to food security*."

Starting in 2019, following the political events experienced by the country, several privatization operations of public entities proved to be opaque, such as the takeover of ENCG units by the private group KOUGC, which prompted the public authorities to recover the units of the company in question through legal proceedings and to chart a new strategic course, the results of which seem to indicate that the state will play a central role in the development and direction of this sector in the future.

Conclusion

At the end of this contribution, which has led us to retrace the various stages in the emergence, development, and restructuring of the oilseed sector in Algeria, we can confirm the absence of a coherent strategy within this sector, which has greatly contributed to the chronic imbalance in supply and regulation of the fat market.

Indeed, the lack of mobilization by the public authorities and the procrastination in formulating an intra-sector development strategy (nationalization, disengagement, privatization, integration) have meant that the various reforms carried out have ended in failure. As a result, Algeria remains one of the world's leading importers of soybeans (third largest importer in 2023) with a bill of $1.2 billion, and subsidies for table oil continue to weigh on public finances ($108 billion in subsidies in 2023). This compromises the goal of self-sufficiency by 2026 and of making Algeria an exporter by 2027, despite the considerable efforts made over the past three years to bring the agricultural sector closer together through the cultivation of increasingly large areas and thethe processing industry, which has acceptable crushing and refining capacities compared to the capacities in force in this industry, which is strongly influenced by volume and scale effects.

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