

Original Research Paper

Agro-food Industries in Algeria: Between the confirmation of performance and the consolidation of food security

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Abstract

This paper will attempt to shed light on this sector too long put on the backburner by economic decision-makers (too busy with the hydrocarbons sector) and which suddenly (due to the effects of the fall in price of a barrel) finds itself among the economic priorities of the State, in order to analyze the real potential available and meet the expectations of the State and especially consumers and markets. We will attempt a strategic analysis based on a few steps taken by Algerian companies, with the objective of tracing the real opportunities and potentials of these in the realization of their own objectives as well as other economic agents, in particular the State (in the food safety issue) and consumers (in their socio-economic design).

Keywords: Agro-food strategies; Markets; Algeria; Food security; Actors; Environment; Enterprises.

المخلص

ستحاول هذه الورقة تسليط الضوء على هذا القطاع الذي طالما عانى من تماطل صناع القرار الاقتصادي (الذي صبوا جل اهتمامهم على قطاع الهيدروكربونات) والذي يجد نفسه فجأة (بسبب آثار انخفاض سعر البرميل) ضمن الأولويات الاقتصادية للدولة، من أجل تحديد الإمكانيات الحقيقية المتاحة وتلبية توقعات الدولة وخاصة المستهلكين والأسواق. وسنحاول القيام بتحليل استراتيجي يستند على وضع خطوات اتخذتها الشركات الجزائرية، بهدف تتبع الفرص والإمكانيات الحقيقية لهذه الأطروحات في تحقيق أهدافها الخاصة، فضلا عن الفاعلين الاقتصاديين الآخرين، ولا سيما الدولة (في مجال سلامة الأغذية) والمستهلكين (على الصعيدين الاجتماعي والاقتصادي). و تتمحور إشكاليتنا الرئيسية حول ما إن كانت شركات الصناعات الزراعية تتطلع أكثر إلى أدائها عندما تبحث عن الأمن الغذائي أو تحاول فقط الوصول إلى هذا الهدف الذي تخطط له الدولة والتي تعتمد عليهم لحل مشاكلها المالية إذا حدثت؟

الكلمات المفتاحية: استراتيجيات الغذائية-الزراعية؛ الأسواق؛ الجزائر؛ الأمن الغذائي؛ الجهات الفاعلة؛ البيئة؛ المؤسسات

Introduction

The agro-food industries are considered a part of international process which tries to establish itself as a sector which will allow a revival of the productive and industrial apparatus, especially the contribution in the settlement of the pending concerns for any economy, like employment, nutrition, inflation, internal and external trade, the trade balance and mainly the domestic product

Certainly, and since the discovery of industrial revolution in the middle of the seventieth century, concentration has been established in particular at the level of heavy and light industries, it was the case with manufacturing, mining, mechanical, electronic and other industries since that the existing opportunities have given wings to producers and manufacturers to better integrate into domestic and international markets.

In Algeria, and like any economy that seeks an economic development strategy, more sustainable and sustained, the industrial sector and particularly that of hydrocarbons holds a predominant and crucial place, judging from the tables of inputs and outputs and especially those of indicators of national economy, on the other hand, the agro-food sector seems clearly supported by economic decision-makers, despite the confirmation of its importance in food, nutrition and trade issues for the country.

The latest upheavals observed, both internally and externally, have revived the idea of revitalizing the sector in order to respond two essential concerns:

- The need to meet the incessant needs of the population;
- The need to provide them with food that meets the health needs required according to international standards.

Our main problematic is to study if agroindustry's firms are looking more to their performance when they are searching for food security or just trying to reach this aim planed by state counting on this agent to resolve their financial problems if they occurred?

1- Some literary and conceptual approaches to the food industry

In a contribution by J. MICHARD¹, it is mentioned that “the food industry transforms live raised products, cultivated plants and fruits into finished food products, ready for consumption. Very heterogeneous, this sector covers several families of activities, themselves subdivided into many areas”, revealing, therefore, that this type of industry is intended to provide balanced and accessible nutrition for a large part of the world population, conferring on it, consequently, this label of supplier of foodstuffs which are not just available and abundant at the level of reciprocal markets.

The international economic situation combined with the social context of consumers have unveiled a new trajectory for the agro-food industries, all the more so as the new consumer demands have proved to be more inciting and stimulating for this type of industry, multiplying, of this In fact, the number of companies involved and affected by this activity, proof of this is that a large part of these firms are found among the most powerful and the most efficient (in terms of financial gains and profits).

The changes made at the level of consumption, linked to the formidable and consequent developments in the marketing, research and development strategies and policies of international companies, have constituted valid and sharp arguments for producers and managers to think and reflect on the best solutions to meet the needs of consumers, knowing that other parameters and factors have come into play such as questions of ecology, environment, health protection, eco-citizenship, organic products and many others.

The countries of the European Union represent the world's largest player in the fields of IAA. The agro-food industry is indeed one of the pillars of the Union's economy:

- ❖ The IAA is the first industrial employers: according to Eurostat, they employ 4 million people.
- ❖ They also represent the leading industrial market within the EU: with a turnover of 954 billion euros in 2009, the sector alone accounts for nearly 13% of the industry's overall European turnover, ahead of the automotive and chemical industries.

It seems clear that the agro-food industries (IAA) are trying to manufacture products that meet nutritional expectations of consumers, but also those of the environment and ecology, which seems a rather delicate and complex task for companies, forcing, therefore, multinationals to redouble their efforts in this direction to preserve and respect the cited standards, without abandoning and compromising their positions in the international commercial sphere.

¹ J.Michard, Studyrama, 2017.

The whole problem with the question of the food industry is situated at the level of the satisfaction of food needs of population, according to the degrees of interest and choice for the latter, because some try to satisfy their nutritional preferences for particular reasons, and others to guard against the risks of famine and nutritional poverty, thus leading firms and multinational companies specializing in this type of production and manufacturing to carefully study consumption demands and consumer choices.

The transformation of international economy, the emergence of new marketing approaches, the upheavals in the culinary habits of populations and consumers, have meant that the agro-food industries are trying to redeploy and transform themselves according to these new conditions and requirements, starting from the fact that world food consumption is more exponential and increasing compared to the available and existing means and tools.

So many time neglected in favor of other types of industry, the agro-food industry is recovering and launching thanks to a strong mobilization of consumption observed and reported at the global level, a resurgence due to a nutritional and food transition observed at the level of consumers, linked to a high wage intensity and a breakthrough of a new income policy which has been accompanied by an unparalleled enthusiasm for nutrition and food issues, with the added bonus of a new reconfiguration of the nutritional distribution.

Several authors, researchers, experts, international institutions have looked into this subject, in order to better prepare the scientific and valued arguments to defend the idea on the need to put the growth of agro-food companies back on track, for a double goal :

- ❖ Achieve an acceptable and comfortable level of profit for the companies involved in this type of activity.
- ❖ Achieve a level of assurance of food security for international consumer markets.

This should not be a contradiction as long as producers and consumers are playing a more human and social battle, with the support of the State and its institutions.

2- The agro-food industries in the Algerian case

It should be noted that the question of meeting the food needs of population was always at the heart of concerns of public authorities, notwithstanding the changes and transformations carried out during the development process, whether during the period of the centralized system, the period of the transition or that which coincides with the establishment of the commercial and liberal system.

The fact that these firms (private and public) have seized the opportunity of price liberalization, and State support in terms of taxation, insurance, import aid and also for exports, and especially facilities at the level of banks, financial and administrative institutions, has caused agro-food firms to attempt a certain economic and commercial breakthrough to gain market share.

The big names of agro-food industry, among others, Amor Benamar, Cévital, Hamoud Boualem, Sim, Soummam, Seybouse, and others, have confirmed their presence and aptitudes to offer on the national market products and foodstuffs which best meet the demand expressed by consumers, while keeping to the question of price and quality, even offering, in passing, some privileges for sales operations abroad.

It should be noted that this sector currently employs 1.6 million people, or 23% of the working population. It is the second largest industry in the country, after energy, and Algerian households spend an average of 45% of their spending on food².

On the other hand, Algeria is now the leading African importer of food, with 75% of its needs met by imports. The insufficiency of Algerian agricultural production, coupled with a massive and growing demand for agro food products, makes Algeria a structurally importing country, and putting more pressure on this type of industry in order to achieve the stated objectives, not only for the State in the

² Statistics from National Office of Statistics, Algiers, 2019.

context of trade balance and the preservation of social peace and the policy of subsidies and support for food products, but also for consumers who express concerns and fears at each resonance of crisis or rupture of stock at supply points, as was the case recently with sugar and coffee.

The agro-food industries are faced with a few problems:

- i. The lack and insufficiency of domestic agricultural production which directly affects the level of production.
- ii. The nature of the marketing of this type of product, in particular through the infiltration of intermediaries and the informal circuit.
- iii. An absence of structures for a good distribution of foodstuffs (absence of wholesale and local markets).
- iv. A flagrant absence of consultation and communication between the agro-food manufacturers and the public services concerned (in particular the trade departments).

The agro-food industries in this country have evolved well in an economic context that is complex and delicate enough to be able to judge performance and efficiency, notwithstanding other shortcomings and obstacles identified in the management of the targeted companies and more particularly the problem of skills and know-how in this specific area, without obscuring the technological and organizational aspect of the activity.

On the strategy side, the firms concerned are trying to adapt according to the new changes in the consumer market, with an attentive eye to the decisions and directives of economic decision-makers as well as the movements observed in international markets.

These concerned enterprises and those exercising in this activity have become more numerous and varied, in particular the small and medium-sized ones, which bodes quite interesting prospects for the sector, but in view of the diagnosis and audit established mainly in the questions of performance, it appears that the latter still suffer from some obstacles which can be situated as follows:

- i. Inappropriate management given the nature of this activity which requires fairly deep and broad knowledge in the field of agro-food.
- ii. Insufficient funding for projects and activities related to the proper functioning of the sector.
- iii. A rather vague and inconsistent strategy in relation to the objectives assigned and planned by those in charge.
- iv. A fairly worrying and risky lack of knowledge of agro-food business, especially in the contemporary and current economic national and international context.
- v. Obvious ignorance of the issues raised by the issue of food security.

The agro-food industries, in this country, have always been considered an integral part and included in the various economic plans and programs initiated by economic decision-makers, as is the case for a large majority of developing countries, which explains why all this attention and special interest in the implementation of a real long-term strategy.

It must be recognized that the private sector dominates such sector if we judge by the number of companies operating, with significant commercial penetration such as the case of Cevital (sugar, oil, margarine), Benamor (pasta), NCA Rouïba (juice), and many others, while the public is content with a few timid interventions at the level of the domestic market.

The debate on agro-food industries in Algeria encourages an understanding and explanation of the process of evolution of this type of company and especially the managerial practices developed and

applied, particularly in a national economic context which is distinguished by some inconsistencies and dysfunctions in questions relating to the management of these firms, which are trying to redeploy and set themselves up for the purpose of reconquering the local market and a vision towards the external market, as long as the opportunities allow such an optic .

In the Algerian case, it seems that the centralized system has left traces and consequences in the question of the management and the search of performance, including those in the agro-food industry, excluding the real skills of decision-makers and managers at the level of these entities and relying, too often and exclusively, on hierarchical and centralized decisions that did not correspond to the realities experienced in the field and especially the food needs that these companies could meet and respond to.

Certainly, it seems that particular attention is observed and raised with entrepreneurs and other project leaders in this activity (by consulting the number of VSEs and SMEs), but this remains more quantitative than qualitative, and also inappropriate and inadequate management for such activity, with the exception of large companies already established in the domestic markets and which are eyeing the outside world.

There is, however, a relative certainty that agro-food companies in this country operate in a new economic environment, both national and international, which differs completely from the old economic system, which is more rigid and rigorous, which presages a new dynamic that can be launched and renewed for producers, knowing that international institutions attach particular and precious importance to these questions of food security.

In our opinion, agro-food companies in Algeria find themselves in a more favorable, incentive and interesting context to conquer market shares, both national and international, provided that other stakeholders play the game, like the State and its institutions, as well as the consumer markets, but this also requires appropriate and adapted strategies and policies to avoid the errors and shortcomings of the old managerial and productive practices practiced.

3- The quest for the performance of the agro-food sector in Algeria

The performances of agro-food companies are more perceived and valued through their real and displayed implications, not only in the resolution of the issue of food security, but above all to put in place a sustainable policy of this issue, with a concern for to offer quality food to consumers and at the same time to meet the requirements and directives of international institutions, which are too attached in matters of hygiene and the preservation of human and animal health.

By analyzing a study by JMTOUZARD³, we further strengthen our conviction that the performances achieved by a few multinationals, at the global level, are not stranger to the historic and remarkable development of the outputs and outcomes of research centers and mainly the research / development function, which seems to be regaining a strong and unavoidable position in the agro-food sector.

Regarding this question of performance, the author insist on the inclusion of innovation and the function of research and development in order to propose and offer better products for consumers with high quality, and also to be correct with international norms dealing with hygiene and preservation of human and animal health.

Several authors have looked into this question of performance, which explains the (strong) positions of agro-food multinationals in the world, among others, F. CHERIET, JLRASTOIN, R. PEREZ and others, and converge towards the idea that domestic companies are forced to resort to policies that are decisive and impactful enough, to be able to secure a place, at least, at the regional level, considering that the resolution of food security problem passes through a need to create an atmosphere and an environment that suits the objectives set, without creating further financial and economic problems.

³ J.M.TOUZARD, "Food security and innovations in agriculture and agro-food: towards a new research agenda? A review of the literature", review Cahiers Agricoles, Volume 21, N°5, September-October 2012.

Algerian companies (private or public) are specified by smaller sizes and weight compared to giant companies in this type of activity, despite the efforts made and provided by some companies seeking to rise to international level, while paying particular attention to the issue of food security in the country, both in terms of abundance, quality and prices.

Our focus on criteria such as performance, effectiveness, efficiency, yields, emanates from our deep conviction that the issue of food security does not just boil down to an equation with multiple variables such as the availability of products, improvement of quality, application of prices deemed reasonable and affordable, means of accessibility and others, but to set up a stimulating environment for local businesses and well versed in this type of industry so that they fulfill more of their commitments in terms of results and added value.

We can cite some avenues of interest for the case of local companies, through the developments of international companies, as follows:

- i. Perfect and in-depth knowledge of the food industries and food safety.
- ii. A suitable, appropriate and adequate managerial system with traced and planned objectives.
- iii. An environment that is well suited to the activities of agro-food industries.
- iv. A relationship based on reciprocal and mutual agreements between these companies and the State, with a common objective, that of food safety and the performance of the companies concerned.
- v. Continuous and regular monitoring of international agro-food markets, through a compliant information system and an adapted and evolving monitoring system.
- vi. An involvement of other factors and parameters that allow a smooth transition from the national market to the international one and above all a synergy between agro-food activities and the contours of food safety, for the good of consumers and manufacturers.

Reading these points concerning the relationship between the performance of agro-food companies and the issue of food security, it is believed that Algerian companies (under different statutes) can draw some lessons:

- i. Local businesses need to understand the link between ensuring food security and their own interests.
- ii. The need to carefully study and examine the real needs in terms of quality, ingredients, and caloric weight of local consumers.
- iii. Continuous and regular monitoring of the evolution of agro-food companies on international scale.
- iv. Particular attention to the evolution of international agro-food markets, both in terms of prices, production, organizational and managerial changes, new distribution and marketing concepts, listing on stock exchanges and others.
- v. A reflection on the nature of partnerships and cooperation in the agro-food sector (either public-private, public-foreign, private-foreign).
- vi. Avoiding confusion between food security as a subject of a more human and social than economic nature and the exact profession of companies, namely profits, gains and benefits.
- vii. A broader and more extensive cooperation with the State, not only as a recipient of aid, advantages and exemptions of all kinds, but also as an actor who contributes to a permanent resolution and outcome of this food security issue.

4- What future for national agro-food companies in the face of the crucial issue of food security?

In the Algerian case, and despite the good intentions and goodwill of the country's economic and political decision-makers on the issue of food security with a wink for agro-food companies, the situation for a definitive settlement is not still resolved and settled, thus pushing the power in place to reflect on two fronts:

- i. Despite the financial constraint, the establishment of a strategy to consolidate the supply and abundance of agro-food products for the population, with studied and flexible prices.

- ii. Reflection on approaches and practices to boost and encourage the companies concerned to work better in the production and distribution of foodstuffs, especially in terms of displayed prices.

In a concern to preserve food security and as it was cited⁴, the national support plan for agro-food industries, drawn up by the Ministry of Industry and the Ministry of Agriculture and Rural Development, and launched in 2010, had relied on improving the competitiveness of companies in the sector in order to create more wealth and employment, but, also on the increase in the turnover of these companies. This trend of expansion and development makes agro-food an interesting market in the future.

In this matter, D. BELAID⁵ who notes a regression of the public compared to the private, since the latter dominates for more than 90% of agro-industrial activities, affirms, on the other hand, that "" the competitiveness of the agro-food sector is affected by a number of technical difficulties (which can be resolved by modernizing equipment) and managerial difficulties (hence the use of foreign know-how and the need for training)".

In another report⁶, it is clearly stated that the question of food security, in relation to that of the performance of national companies, is not just a matter of a price-quality equation, but of allowing a large number of consumers to maximize their culinary and nutritional uses according to the quantities available, in order to relieve the State of the heavy financial burden in import operations and also to allow the emergence of these economic entities, in particular those which aim international markets .

It is clear that the current context is more favorable for the revival of agro-food companies, given the existence of a market, relative agricultural production, a more suitable socio-economic environment and above all a more pronounced state commitment and displayed by economic decision-makers, only the downside exists on the level of the question of financing projects launched by these companies due to the deterioration of external income explained by unfavorable financial situation for the country. In one of our interventions⁷, it was quoted that "we cannot debate such a burning and crucial subject as that of food security without establishing a link and causality with the level of development and growth of the agro-food sector, itself. depending on the level of growth in agricultural sector, since this is a relationship that will determine not only supply versus demand for this type of product, but above all whether the State is available to provide foodstuffs to broad strata of the population, especially the most vulnerable and fragile (in terms of income and wages), on terms that favor local government and consumers".

It is considered that the future of the agro-food sector is highly dependent on external elements, among others: International markets, tax system, regulatory framework, nature of the support of the State, income distributed and others , as well as internal, such as: A fairly advanced and high managerial skill, know-how acquired in the supply and marketing chains, a research and development function more oriented towards the food industry, high-performance technical skills in the production and others, all of which obviously depends on the moods of the international oil markets which come up with every idea of launching an economic sector in Algeria.

5- Food industry versus food security in Algeria

It should be noted that the State has set up a program for the development of agro-food industries (PNDIA) from 2010 precisely to strengthen the strategic place of this sector at the level of the economy, and as the first priority for the new industrial policy.

⁴ Review Agroline, N°103, April-June 2017.

⁵ D.BELAID, collection entitled "The agro-food sector in Algeria", Volume 1, Collection Dossiers Agronomiques, Edition 2016.

⁶ Consult a report entitled: "Analysis of the state of Food and Nutritional Security in Algeria", Strategic review of food security in Algeria, CREAD, March 2018.

⁷ Paper untitled: "The agri-food sector in Algeria: Between the preservation of food security and the sustainability of the sector" by Chaib Baghdad, Khouani Leila and Chikhi Kamel, Study day on agro-industrial strategies in Algeria, High School of Management, Tlemcen, March 2018.

Thus, main ingredients are identified as follows:

- ❖ A national council is set up with the mission of implementing and enforcing the action plan.
- ❖ The implementation with reinforcement of public actions, through a set of appropriate and adequate public policies, to supervise and oversee the agro-food sector.
- ❖ Like other industrial companies, agro-food companies will benefit from an upgrading program to strengthen the managerial organization.
- ❖ Creation of an inter-ministerial delegation for the benefit of the development of the agro-food sector.
- ❖ The creation of a special fund for the encouragement and stimulation of this sector, with an initial fund of 50 billion DA.
- ❖ The long-awaited and desired establishment of agro-food technology parks, with all that includes technological advances in the field, the emergence of start-ups, incubators, scientific research and others.

A brief summary of the relationship between the performance of agro-industrial companies and the issue of food security, at least from the point of view of business leaders, prompts us to cite the main concerns of the latter, namely:

- i. An economic, financial and commercial environment that does not encourage the exercise of this activity.
- ii. A state trade policy that clings even more to food import operations (an annual average of between \$8 and \$9 billion), thereby threatening the aspirations of producers to cover local demand by home production.
- iii. Persistence of difficulties and constraints in the relationship with State institutions, such as banks, tax and legislative administration, customs, trade services, local administration and others.
- iv. An industrial sector which is sinking into worrying agony and which is affecting the revival of the agro-food sector.
- v. An agro-food market that does not stand out from old consumption patterns (based mainly on cereals and its derivatives).
- vi. Fairly unfair competition, particularly with imported products and those offered informally.
- vii. State and governmental language that does not fit with the realities on the ground and above all that does not protect local products well enough, particularly in terms of hygiene and health, as stipulated in the speeches and calls on sustainable development.
- viii. A training of human resources, through universities, training centers, specialized institutes, and others, which does not seem to correspond to the expectations of business leaders, particularly in an international economic context which swears only by excellence and competence at all levels, particularly human resources.

It is certain that the question of food security is more primordial and pre-eminent for certain States which feel the need for a definitive settlement (as in the case of Algeria), but it must be made clear that this can't be materialized and produced without the sector concerned being suitable and available for such an approach, hence the need to promote consistent and adequate development for agro-food production, with all the necessary measures in this direction, like management ideal funding commensurate with commitments, and above all a dedicated environment for such a purpose.

Discussing the agro-food sector in parallel with the burning issue of food security in Algeria requires a few measures, among others:

- ❖ Sustained and regular growth of agricultural production at all levels (plant, animal, intensive, extensive, etc.).
- ❖ A perfect and appropriate organizational structure at the level of local and national agribusiness entities.
- ❖ A support framework perfectly integrated and inserted into the concept of food security, like financial institutions and banking, legal institutional and other framework.
- ❖ A clear and precise vision of the role of the State in this sector, with a clarification and precision of the missions and functions which are devolved to it.
- ❖ A national market capable of absorbing and acquiring the products available on the national markets, avoiding the possible and probable dysfunctions and disruptions that may emerge.

- ❖ A hope that the external hazards (turbulence, disturbances, imbalances, partial or global crises of international markets) can't disturb or alternate the smooth running of the procedures at the level of the national economy.
- ❖ Another desired and hoped-for support from international agro-food institutions (such as the FAO, IFAD) to properly support national companies in food security for the population and why not a possibility of exporting to international markets.

To synthesize, we arrive at a few interesting observations:

- i. The Algerian State is still an importer of foodstuffs, in particular wheat and pulses (according to the latest data available in 2019, imports of agricultural products (fishery products included) represent 27% of total Algerian imports(representing, then, more than 9.4 billion dollars).
- ii. Domestic agricultural production, despite countless and frequent support from the State, still fails to cover local demand in a satisfactory and suitable manner (still 70% coverage of food demand).
- iii. National agro-food companies admit their inability and inadequacy in the total coverage of consumer market, despite their good faith, determined and displayed aversion to effective revival of the sector.
- iv. The issue of food security remains, always, dependent on the evolutionary state of the three elements mentioned above, namely a convergence between the State, the farmers and professionals of this activity and the business leaders of the sector.

The challenges and prospects of agro-food companies in Algeria are defined by internal and external parameters, and leaders and managers will have to choose and draw up the most compliant, adapted and suitable policies and strategies to carry out the activities that are attached, taking into account a high probability that the internal and external environment has become very elusive and untenable, with bursts and moods that can compromise the objectives set out and call into question the initial strategies developed and implemented.

Initiating a debate on agro-food companies in Algeria in parallel with the question of food security leads us to insist on the fact that the two elements and variables are intimately linked by the fact that the activities of these companies are centered on the need to supply consumer markets with healthy, sanitary and hygienic and above all accessible products, alluding to food security which is not just a purely socio-economic phenomenon.

In the light of these points, we arrive to a certainty that the agro-food industries in this country and the question of food security are not dissociable or contradictory, as long as these companies have the mission of producing products demanded by the consumer markets, which can lighten, at the same time, this heavy mission of the State in ensuring food security for the population, without too much harm either for one or the others.

Results

The reading of the previous points and to remain in logic and objectivity at the height of the treated theme, we thought of some results as follows:

- i. We feel that national agro-food companies (both private and public) have understood the State's message on the issue of food security and feel available and ready for this challenge.
- ii. These companies have tried to show the delicacy and complexity of their activities, particularly in terms of the economic environment which seems to constitute a serious obstacle to their smooth running.
- iii. The State is not convincing and reassuring enough on some decisions to allow these companies to embark on this agro-food activity, thereby creating some apprehension and concern among managers and business leaders (particularly private).
- iv. The compromise between the State and the agro-food companies does not yet seem to have been reached, particularly on the subject of food security, because the two parties, even if this question is essential for them, advocate different visions and divergent, especially on the question of financing and foreign trade.

- v. Certainly, a large number of companies are versed in this activity, which is very lucrative and advantageous, but another large number of these seem to underestimate the risks of foreign and perhaps national competition (especially the weight of the informal economy).
- vi. The financial constraint also seems to be a major handicap for both parties (State and companies), since that oil revenue remains the only way out for such a function, constituting, as a result, another challenge to link the agricultural function food and food security.
- vii. Knowledge of agro-food markets, particularly at the international level, is becoming a fundamental condition for national business leaders, hence the need to pay close attention to the human, technological and financial potential available at business level.
- viii. The need to open a broad debate between agro-food companies and State institutions to properly assimilate the issue of food security and the ways that allow serious and appropriate management, for the good of the State (as social and economic guarantor) and companies for their profits and gains.
- ix. There is a certain renewed interest in agro-food activity in this country, admittedly relative, but the adaptation of economic environment (banks, tax, customs, commercial administration, consumer markets, territorial administration ...) to this type of activity is deemed essential.

Conclusion:

It must be understood that the nature of national economy, as a rentier economy, exerts additional pressures on the managers of agro-food companies insofar as they must realize that the question of food security is a national question which will concern, in the first place, agro-food companies, through the need to reduce food imports and think about non-hydrocarbon exports, a subject that comes to the first degree and role given the financial context that the country is experiencing.

For our part and as a partial and unfinished conclusion, we believe that national companies are in a take-off and start-up phase, admittedly a little forced, to be able to measure themselves against fairly high levels of competition and competitiveness, which leaves some extenuating circumstances, but it requires some time for these to achieve appreciable and comfortable economic and financial performance and returns, key factors for the issue of food security.

All the big firms have started with difficulties and sometimes pain, which has encouraged and supported them in their quest for market share, both nationally and internationally, which should be the case for our national companies, provided that the necessary conditions for such a sector and activities are well met and available, knowing the characteristics and specificities of such industry, but when it comes to an issue as relevant and crucial as that of food safety, the convergence of the interests of key players in the agro-food sector becomes a priority, preeminence and urgency, knowing that the time factor is no longer a controllable or manageable variable, particularly for economies that are lagging behind in the issue of food security.

The fact remains that the burden seems more shared between the State and those firms for this question of food security, starting from the fact that international economic situation (the fall in the price of the barrel which is beginning to regain some colors and the effects of the Covid 19 pandemic) is not really there to allow an outbreak of the agro-food sector, accentuated with the absence of a diversified and competitive economy, but this constitutes, in our view, an opportunity and a boon to create synergy and coordination between the two partners, as long as the profits and advantages are more convergent than divergent.

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