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ECONOMIC LIBERALISATION AND TRANSFORMATIONS OF THE AGRICULTURAL SECTOR IN ALGERIA

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Abstract. *This article investigates the impact of trade liberalization policies on the transformation of Algeria's agricultural sector since the economic reforms of the 1990s. Drawing on historical data and recent scholarly contributions, the study highlights structural changes in production systems, sectoral organization, competitiveness, and integration into the global economy. The analysis shows that liberalization generated both significant challenges for domestic production and opportunities for diversification, while exposing persistent institutional and structural weaknesses.*

More specifically, the paper examines the effects of Algeria's economic opening within the framework of the Algeria-European Union Association Agreement. Based on a systematic review of empirical studies and recent econometric analyses, the findings reveal that trade liberalization has influenced productivity, rural incomes, and food security. While the agreement facilitated greater integration of agri-food value chains, it also deepened dependence on cereal imports and increased the vulnerability of small-scale producers.

Keywords: *trade liberalization, agricultural transformation, Algeria, food security, rural incomes, agricultural competitiveness, import dependence.*

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Introduction

Trade liberalisation refers to the process by which a country reduces or eliminates barriers to international exchange (customs duties, quotas, restrictive regulations) in order to strengthen its integration into the global economy. In Algeria, such policies intensified from the 1990s onwards, within the framework of structural adjustment programmes, international commitments, and pressures to modernise the national economy.

Historically supported by public policies and self-sufficiency programmes, the agricultural sector found itself confronted with increased competition, market opening, and a transformation of production methods. This dynamic raises questions about the internal changes observed and their implications for the sector's performance, organisation, and sustainability.

The Association Agreement signed in 2001 between Algeria and the European Union, which entered into force in 2005, aimed to establish a free trade area and diversify exports beyond hydrocarbons. In this context, agriculture was perceived as a strategic lever to reduce dependence

on oil revenues. However, liberalisation exposed Algerian agriculture to heightened competition, thereby revealing its structural and institutional weaknesses (Anderson & Martin, 2006).

Literature Review

From a theoretical perspective, economic openness in the agricultural sector is analysed through several major schools of thought. Classical and neoclassical theories emphasize the efficiency gains from trade. Ricardo's theory of comparative advantage (Ricardo, 1817) argues that openness allows countries to specialize in products where they hold relative efficiency, which in Algeria's case could mean Mediterranean crops such as fruits, vegetables, and olives. Similarly, the Heckscher-Ohlin model suggests that nations export goods intensive in their abundant factors; Algeria, with land and labour, should theoretically export more agricultural products, though in practice it remains heavily dependent on imports (Mounier, 1992).

Development theories provide a more critical lens. Structuralist approaches highlight that openness often weakens agriculture in developing economies by prioritizing industrial imports and undermining local production. Dependency theory, advanced by (Prebisch, 1950) and (Frank, 1969), stresses that integration into global markets can reinforce reliance on developed countries for agricultural inputs and food staples. Algeria exemplifies this dynamic with its persistent dependence on imported cereals and dairy products (Bessaoud, Pellissier, Rolland, & Khechimi, 2019).

Institutionalist and contemporary approaches focus on the role of governance, policies, and international standards. Modern agricultural economics views openness as both an opportunity for modernization and a source of vulnerability, particularly when global crises disrupt supply chains or when stringent EU quality standards challenge local producers. Theories of food security and sustainability further argue that openness must be accompanied by strong domestic policies to support small farmers and safeguard natural resources (Zongo, 2024).

In sum, economic theories portray openness in agriculture as a double-edged sword: it can foster modernization and integration into global value chains, but it also risks deepening dependency and exposing local producers to external shocks. For Algeria, these frameworks suggest that the benefits of its partnership with the EU will only materialize if openness is balanced with robust national strategies for food security and agricultural development.

The Historical Background of Economic Liberalisation in Algeria

The liberalisation of Algeria's foreign trade officially began in the early 1990s, in a context marked by the economic and financial crisis that followed the collapse of oil prices in the 1980s. This drastic decline in export revenues weakened the national economy, which was heavily dependent on hydrocarbons, and prompted the authorities to undertake structural reforms under the guidance of international financial institutions. The structural adjustment programme adopted in 1994, supported by the World Bank, represented a decisive stage. It included, among other measures, the devaluation of the dinar, the reduction of subsidies, the partial privatisation of state-owned enterprises, and the gradual liberalisation of trade (World Bank, 2003).

During this period, Algeria progressively reduced its tariff and non-tariff barriers, opening its market to foreign products. However, despite these reforms, the structure of exports remained dominated by hydrocarbons, accounting for more than 95% of export revenues, which limited the impact of liberalisation on economic diversification (World Bank, 2003).

A major turning point came with the signing of the Association Agreement between Algeria and the European Union in 2002, which entered into force in 2005. This agreement sought to establish a free trade area and encourage the diversification of non-hydrocarbon exports (European Union, 2005). The European Union quickly became Algeria's principal trading partner, accounting for nearly 50% of external trade during the 2010s (European Commission, 2023). However, the effects of this agreement were ambivalent: while it facilitated the integration of agri-food chains, it also led to a sharp rise in imports, particularly of agricultural and food products, thereby increasing the country's dependence on foreign supplies (Kirouani, 2020).

In the agricultural sector, historically supported by public policies and self-sufficiency programmes, liberalisation exposed structural and institutional weaknesses. The heightened

competition from European products undermined small local producers, while dependence on cereal imports grew stronger. In 2023, Algeria imported nearly 14 million tonnes of cereals, including 8.7 million tonnes of wheat, confirming the persistence of a structural vulnerability in food security (FAO, 2024).

Transformations in the Agricultural Sector

Structure of Production and Competitiveness: Trade liberalisation has exerted considerable competitive pressure on Algerian agricultural producers. Faced with high production costs, low productivity, and recurrent climatic constraints, these producers have struggled to compete with agri-food imports, which are often cheaper and of higher quality. According to the World Bank, agriculture contributed around 13% to GDP and accounted for 9% of total employment in 2023, yet it remains dominated by sectors with limited competitiveness (World Bank, 2023).

The growing demand for imported products, particularly cereals, dairy products, and meat, has reshaped the structure of local production. In 2023, Algeria imported nearly 14 million tonnes of cereals, including 8.7 million tonnes of wheat, confirming a structural dependence on food supplies (FAO, 2024). This dependence restricts food sovereignty and heightens vulnerability to fluctuations in global prices.

Moreover, liberalisation has not led to sufficient modernisation of domestic value chains. Investment in agricultural infrastructure, mechanisation, and technological innovation has remained inadequate, thereby reducing the expected benefits of broader access to imported technologies (World Bank, 2025).

Employment and Structural Transformations: The effects of liberalisation on agricultural employment appear mixed. A sectoral econometric analysis covering the period 1990-2023 shows that trade openness has had positive effects on certain segments of the economy, but agricultural employment has remained relatively stagnant, owing to structural constraints and the increased competition from imports.

The rural productive fabric has not received sufficient support in terms of human capital and agricultural infrastructure. Small farms, which account for a significant share of the sector, remain vulnerable to external shocks and struggle to integrate into modern value chains. Recent initiatives, such as the ITC project aimed at strengthening the competitiveness of agri-food SMEs, seek to improve employment and regional integration, but their effects remain limited at the national level.

Dynamics of Imports and Agricultural Modernisation: Trade liberalisation has led to sustained growth in imports of agricultural and food products, profoundly reshaping trade flows and domestic supply chains. According to the FAO, Algeria imported nearly 14 million tonnes of cereals in 2023, including 8.7 million tonnes of wheat, confirming a structural dependence on international markets (FAO, 2024). This dependence is explained by low local productivity, recurrent climatic constraints, and the fragmentation of agricultural holdings. Despite some occasional improvements in specific sectors, such as cereals or dairy, thanks to targeted sectoral policies, these advances have not been sufficient to sustainably reduce the food bill or strengthen food sovereignty (World Bank, 2025).

At the same time, several initiatives have been launched to modernise agriculture and increase the resilience of the sector. These include programmes to improve yields, the introduction of improved seeds, progressive mechanisation, and the expansion of industrial agriculture in Saharan areas. The National Plan for Agricultural and Rural Development (PNDAR) and projects to develop Saharan lands have sought to diversify production and exploit new water resources (Ministry of Agriculture, 2023). However, these efforts remain constrained by institutional weaknesses, a deficit in logistical infrastructure, and limited integration of value chains.

Recent studies highlight that agricultural modernisation in Algeria remains incomplete. The International Trade Centre (ITC, 2024) notes that agri-food SMEs struggle to integrate into regional and international markets due to a lack of competitiveness and inadequate quality standards. Moreover, dependence on imports of staple products, such as cereals and powdered milk, continues to undermine national food security. The World Bank (2025) stresses the need to strengthen

investment in rural infrastructure, human capital development, and technological innovation in order to achieve a lasting transformation of the sector.

In sum, while trade liberalisation has enabled Algeria to achieve greater integration into global flows, it has also heightened food vulnerability and exposed the limitations of agricultural modernisation policies. Dependence on imports remains a major challenge, and the reforms undertaken must be consolidated through a long-term strategy focused on productivity, sustainability, and competitiveness.

Institutional Challenges and Public Policies

The structural transformations of Algeria's agricultural sector are closely linked to the public policies implemented to accompany economic liberalisation. However, the absence of robust and coherent agricultural strategies has limited producers' ability to adapt to new market conditions, modernise their practices, and gain access to wider outlets. Shortcomings in rural infrastructure, appropriate financing, and targeted support mechanisms have hindered the effective transformation of the sector, increasing its vulnerability to international competition (World Bank, 2025).

Reforms in foreign trade, by reducing tariff barriers and facilitating access to imports, have not always been accompanied by protective measures or initiatives to strengthen the competitiveness of local producers. This asymmetry has often disadvantaged national farms, particularly small and medium-sized ones, which struggle to compete with imported products benefiting from subsidies or more efficient logistical chains (FAO, 2024).

On the institutional level, several studies highlight the fragmentation of agricultural policies and the lack of coordination between different public and private actors. The National Plan for Agricultural and Rural Development (PNDAR), launched in 2000, achieved some progress in supporting strategic sectors (cereals, milk, dates), but its impact has remained limited due to problems of governance, monitoring, and evaluation (Algerian Ministry of Agriculture and Rural Development, 2023). In addition, rural financing mechanisms remain insufficient, with restricted access to credit for small farmers, which hampers investment in modernisation and innovation (African Development Bank, 2023).

Finally, liberalisation has revealed the need for an integrated agricultural policy that combines food security, competitiveness, and sustainability. International institutions emphasise the importance of strengthening institutional capacities, improving land governance, and developing appropriate logistical and storage infrastructure. Without these reforms, Algerian agriculture risks remaining dependent on imports and vulnerable to external shocks, despite the opportunities offered by trade liberalisation (ITC, 2024).

Prospects and Courses of Action

The transformation of Algeria's agricultural sector requires an integrated approach that combines the opportunities offered by trade liberalisation with coherent and targeted agricultural policies. The challenges identified – low productivity, dependence on imports, and the vulnerability of small farms – call for structural reforms and strategic investments.

Firstly, strengthening productive capacities involves increased investment in agricultural technologies, mechanisation, modern irrigation, and rural infrastructure. The World Bank (2025) emphasises that improving agricultural productivity is essential to reduce food dependence and enhance resilience to external shocks.

Secondly, policies to support the competitiveness of small farms must be introduced. This includes easier access to credit, farmer training, and the development of cooperatives capable of pooling resources and strengthening producers' positions in the markets. The ITC (2024) stresses the importance of supporting agri-food SMEs in order to foster their integration into regional and international value chains.

Thirdly, the diversification of agricultural sectors is a priority. Beyond cereals, Algeria has significant potential in horticulture, dates, olive oil, and certain processed agri-food products. These sectors offer opportunities for exports and the creation of sustainable jobs, provided that investment is made in quality, certification, and innovation (FAO, 2024).

Finally, a long-term agricultural strategy must combine food security, environmental sustainability, and international competitiveness. This involves improved land governance, the development of logistical and storage infrastructure, and the integration of climate issues into agricultural policies. The African Development Bank (2023) recommends strengthening institutional capacities and promoting public–private partnerships to accelerate the modernisation of the sector.

Methods

This study is based on the cross-analysis of two statistical series covering the period 1992–2024. The first series concerns the share of food imports in Algeria’s total merchandise imports, drawn mainly from the World Bank (World Development Indicators), the Algerian Customs Directorate, and the Bank of Algeria, compiled by CEIC Data and Trading Economics. The second series relate to the prevalence of food insecurity within the Algerian population between 2001 and 2023, provided by the FAO and the World Bank.

The data were organised chronologically to highlight long-term trends and short-term fluctuations. For imports, values were expressed in billions of USD and as a percentage of total merchandise imports. For food insecurity, figures were presented as the percentage of the population affected. The methodological approach consisted of comparing the evolution of both indicators in order to identify the relationship between trade dependence and food security (Fig. 1).

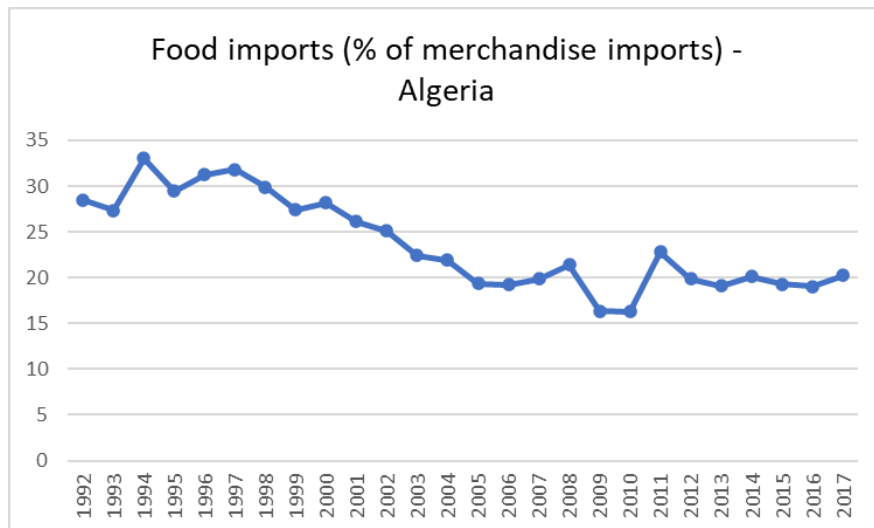


Figure 1. Food imports in Algeria 1992-2017

Source: World Bank (<https://data.worldbank.org/indicator/TM.VAL.FOOD.ZS.UN?locations=DZ>)

Results

The graph on food imports in Algeria between 1992 and 2017 highlights a significant evolution in the country’s dependence on international markets. In 1992, food products accounted for around 27% of total merchandise imports, a level already high and indicative of strong structural dependence. This reliance intensified in 1994, when the share of food imports reached nearly 33%, marking a peak that revealed the fragility of the national agricultural system at that time.

From the mid-1990s onwards, a downward trend gradually took hold. The share of food imports declined steadily, reaching approximately 20% in 2017. This development suggests a relative improvement in national production capacity or a diversification of imports towards other sectors, such as capital goods or energy products. The fluctuations observed between 2008 and 2012 coincided with the global financial crisis and food price volatility, demonstrating the country’s sensitivity to external shocks.

This relative decline reflects a certain resilience within the Algerian agricultural sector, which was able to progressively reduce its dependence on imports. However, the persistence of a level around 20% in 2017 indicates that this dependence remains structural, particularly for staple

products such as wheat, powdered milk, and vegetable oils. Algeria therefore continues to be vulnerable to global price variations and climatic uncertainties affecting local production.

In terms of public policy, this evolution underscores the importance of agricultural reforms and investments in rural infrastructure, the modernisation of practices, and the diversification of production chains. The reduction in the share of food imports is an encouraging sign, but it must be consolidated through a long-term strategy that integrates food security, competitiveness, and sustainability (Table 1).

Table 1. Evolution of Total and Food Imports 2019-2024

Year	Total Imports (USD)	Key Food Products
2019	≈ USD 50.5 bn	Wheat, powdered milk, vegetable oils
2020	USD 40.98 bn (-18.8% vs 2019)	Decline linked to the pandemic
2021	USD 43.56 bn (+6.3%)	Gradual recovery
2022	USD 46.02 bn (+5.6%)	Food imports ≈ USD 11.3 bn
2023	USD 49.68 bn (+8%)	Food imports ≈ USD 10.3 bn
2024	USD 43.6 bn (OEC) / USD 49.7 bn (Macrotrends)	Main products: wheat (USD 1.76 bn), concentrated milk (USD 1.33 bn), raw sugar (USD 1.06 bn), maize (USD 1.02 bn)

Source: CEIC Data, Algerian Customs Directorate, Bank of Algeria. <https://www.ceicdata.com/en/country/algeria>

From 2018 onwards, the data reveal a more volatile dynamic. Food imports remained at high levels in 2018-2019, confirming the persistence of dependence on essential products. In 2020, the global health crisis led to a contraction in total imports, which fell to USD 40.98 billion, representing a decline of nearly 19% compared with 2019. This reduction reflected both weaker domestic demand and logistical disruptions linked to the pandemic.

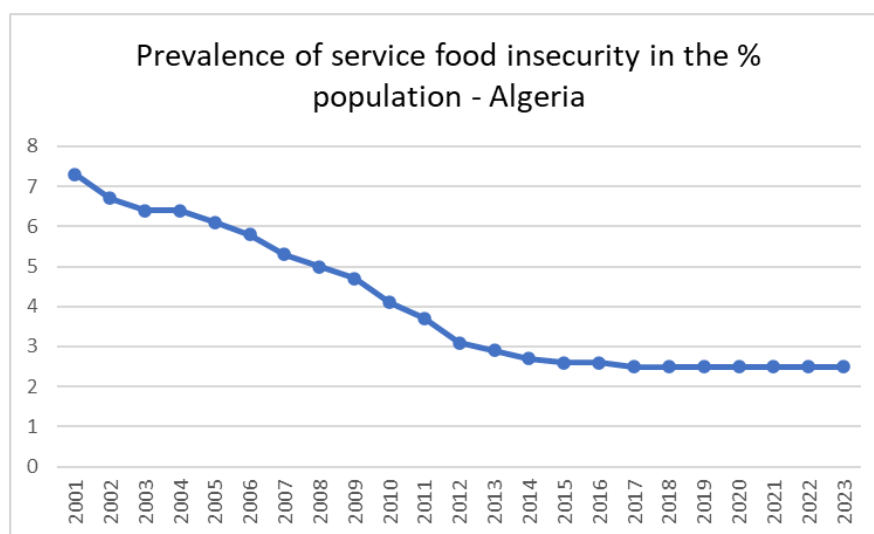


Figure 2. Prevalence of service food insecurity in the % population in Algeria 2001-2023

Source: World Bank (<https://donnees.banquemondiale.org/indicateur/SN.ITK.SVFI.ZS?locations=DZ>)

Recovery began in 2021, with total imports reaching USD 43.56 billion (+6.3%), followed by a further increase in 2022 to USD 46.02 billion. That year, food imports reached a record level of approximately USD 11.3 billion, signalling heightened dependence on international markets and significant pressure on the trade balance. In 2023, a correction occurred, with food imports falling to around USD 10.3 billion, a decline of 8.5% compared with 2022. This development can be explained by the stabilisation of global prices and domestic production efforts (Fig. 2).

In 2024, total imports stood at around USD 49.7 billion, with a substantial share still devoted to staple food products. Wheat remained the leading import item (USD 1.76 billion), followed by concentrated milk (USD 1.33 billion), raw sugar (USD 1.06 billion) and maize (USD 1.02 billion). These figures confirm that, despite a degree of resilience and diversification efforts, Algeria's food dependence remains structural and concentrated on a few strategic products.

Taken together, the analysis of the periods 1992-2017 and 2018-2024 reveals a contrasting trajectory: a relative decline in food dependence over the long term, but persistent volatility and

recent peaks that highlight the country's vulnerability to external shocks. This situation underscores the importance of strengthening agricultural policies, investing in the modernisation of local supply chains, and diversifying production in order to reduce dependence on imports and ensure stable food security.

In 2001, the prevalence of food insecurity in Algeria was estimated at around 7.5% of the population. This high level reflected significant household vulnerability, linked to dependence on food imports and the limitations of national production. From the early 2000s, a downward trend began, reflecting the combined effects of public policies supporting consumption and agricultural investment.

Between 2005 and 2010, the proportion of the population experiencing food insecurity declined progressively to around 4%. This improvement can be attributed to extensive subsidies on staple products (wheat, milk, oil, sugar) and the State's ability, thanks to hydrocarbon revenues, to finance the necessary imports to stabilise the domestic market.

From 2015 onwards, the prevalence of food insecurity stabilised at around 2.5% of the population. This threshold indicates increased resilience within Algeria's food system, but also highlights the limitations of subsidy policies, which reduce food poverty without eliminating it entirely. The persistence of this rate shows that a vulnerable segment of the population remains exposed to economic shocks and fluctuations in global prices.

In 2023, prevalence remained close to 2.5%, confirming the stabilisation observed for nearly a decade. This consistency demonstrates the progress achieved in food security, but also underlines Algeria's structural dependence on imports of staple products, notably wheat and powdered milk.

In summary, the evolution between 2001 and 2023 illustrates a significant reduction in food insecurity, falling from 7.5% to 2.5% of the population. This improvement is the outcome of public policies and strategic imports, but it also highlights the need to strengthen national production and diversify agricultural supply chains in order to consolidate food security on a sustainable basis.

Discussion

The findings reveal a dual trajectory shaped by Algeria's proactive and rigorous public interventions. Between 1992 and 2017, the share of food imports in total merchandise imports declined from 27% to 20%, reflecting a relative reduction in dependence. From 2018 onwards, however, volatility emerged: imports fell sharply in 2020 (USD 40.98 billion) due to the pandemic, surged to a record USD 11.3 billion in food imports in 2022, and then corrected to USD 10.3 billion in 2023, stabilising at USD 49.7 billion in 2024. These fluctuations underscore Algeria's exposure to global shocks, but also its capacity to mitigate them through state-led measures.

In parallel, the prevalence of food insecurity fell dramatically from 7.5% of the population in 2001 to 4% in 2010, and stabilised at 2.5% from 2015 onwards. This achievement was not accidental but the result of deliberate and sustained government strategies. Subsidies on staple foods, large-scale social programmes, and targeted agricultural investments such as the National Programme for Agricultural and Rural Development (PNDAR) were deployed to guarantee access to food and shield vulnerable households from external crises. The stabilisation of food insecurity at 2.5% demonstrates the effectiveness of these policies, even though a residual segment of the population remains exposed.

Taken together, the evidence shows that Algeria's authorities have pursued a rigorous and multi-dimensional strategy to reduce food insecurity while managing trade dependence. Imports, though indicative of structural reliance, were deliberately harnessed as a stabilising mechanism. Subsidies and social protection policies transformed external dependence into a tool of resilience, albeit at the cost of significant fiscal pressure. The challenge now lies in consolidating these achievements by strengthening domestic production, diversifying agricultural sectors, and embedding resilience into long-term food security strategies.

Conclusion

Trade liberalisation has profoundly shaped the dynamics of Algeria's agricultural sector. While it has opened opportunities for integration into international markets and facilitated access to new technologies, it has also exacerbated persistent structural challenges, such as growing dependence on food imports, the low competitiveness of local farms, and the stagnation of agricultural employment. These developments underscore the limitations of economic openness when not accompanied by robust and coherent agricultural policies.

For Algerian agriculture to truly benefit from globalisation, a combination of strategic measures is required. This includes strengthening productive capacities through targeted investment in rural infrastructure, agronomic research, and technological innovation, as well as implementing support policies tailored to small farms. The diversification of agricultural sectors, particularly those with strong export potential and the capacity to generate sustainable employment, also emerges as a priority for reducing dependence on imports and improving food security.

In the recent context of 2025-2026, Algeria has demonstrated notable progress in food resilience despite its continued reliance on imports. In March 2026, the country was ranked 32nd worldwide and first in Africa in the Resilient Food Systems Index (RFSI), with a score of 64.66 points, reflecting an enhanced capacity to manage food availability according to data compiled by the World Bank and the FAO. At the same time, food inflation showed a marked decline in 2025, reaching negative levels in September (-7.6%) before stabilising, largely due to the moderation of fresh produce prices. Agricultural production also displayed signs of resilience, managing to withstand recurrent climatic shocks and maintaining a degree of stability in output.

The transformation of the agricultural sector must therefore be embedded within a long-term strategy that combines competitiveness, sustainability, and social inclusion. International institutions (FAO, World Bank, African Development Bank) emphasise the need to strengthen governance, improve access to finance, and promote public-private partnerships to modernise value chains. Within this framework, Algerian agriculture can become a strategic lever for economic diversification and resilience to external shocks, provided that institutional reforms and investments are pursued in a coherent and sustained manner.

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