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SURVEY OF ECONOMIC CONDITIONS
IN NORTH AFRICA - 1988-1989

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I. INTRODUCTION

The arguments and conclusions contained in this report follow from analyses of data and information prepared by the governments in the subregion in their economic and social situation, data and information available in publications by international institutions and press reports on the situation of the subregion. More accurate and abundant data and information are required for the preparation of such a survey. These shortcomings should be taken into account on evaluating the conclusions reached.

The performance of the world economy in 1988 was strong. In the industrial economies, GNP grew by 4 per cent and in the middle and low-income countries by 5 per cent. The volume of world trade grew by 9 per cent. These aggregates mark significant differences among countries, subregions and regions.

Growth in the industrial countries was a result of increased fixed investment, increased consumption and expansion of world trade. This trend continued in the early part of 1989.

Increasing growth enforced by high inflation and tightened monetary policies generated short-term interest rates. High income oil exporters increased their oil production in 1988. But, the weighted average price fell 20 per cent below the level of 1987. Hence, oil export earnings were about 9 per cent below those of 1987. In spite of the fall in export earnings, imports of these countries were maintained at the level of previous year.

The November 1988 OPEC agreement reinstated market conditions again. Consequently, prices firmed. The price rise was amplified later by supply failure in Alaska and North Sea.

GDP for low- and middle-income countries grew by 5 per cent in 1988. There were substantial differences among countries. Countries with high investment/GDP ratios have grown more quickly. As in previous years, the best performances were realized in those countries whose ratios of Gross

Domestic Investment to GDP have exceeded 20 per cent over a number of years. The corresponding average ratio, for Africa, over the five years, has been 15 per cent. This average conceals lower investment ratio for some countries, in which gross investment is not even sufficient to cover depreciation. Such countries are becoming decapitalized.

GDP has increased modestly in Africa, after declines in previous years. However, the increase was not enough to stimulate a rise in per capita GDP in the face of rapid population growth. Growth in Africa was promoted by a return to normal weather conditions, and by structural adjustments, resulting in an increase in per capita agricultural production.

Performance in heavily indebted countries was mixed. It is now realized, that correction of the serious macro-economic imbalances that have accumulated over years in these countries will take a long time. The efforts already taken seem to be only first steps in a long and difficult process of sustainable steady growth.

The heavily indebted countries were not able to attain a GDP growth greater than their population growth; implying a decline of about 0.6 per cent in their per capita income level. In addition, investment in these countries continued to fall to 15 per cent of their GDP in 1988, compared to 25 per cent in 1980. These investment rates have to be restored to their earlier levels, if sustained growth has to be resumed.

There are regional differences among the group of low- and middle- income countries. Africa, for instance, has declining trends in investment and exports, with little gain in consumption. The downward trend in investment is disturbing. The balance of payments on goods, services and private transfer continued to deteriorate. Much of the change was due to higher factor-service payments.

The economic situation of the highly indebted countries deteriorated in 1988/89. The negative trend in resource transfer continued. Total debt for the developing countries was estimated at about US\$1.0 trillion, an amount equal to 50 per cent of their combined GNP. The year 1988 saw an increase in voluntary reduction by commercial creditors of the debt of a number of middle income debtors. In addition, the US dollar appreciated vis-a-vis other major currencies, bringing down the dollar value of debts paid in these currencies.

Africa lending increased by 6.5 per cent, an increase that was lower than the 18 per cent experienced in 1987. However, much of this could be attributed to currency adjustment. There is a growing recognition by the international community of the need to reduce both the debt stock and debt-service burden of the debt stressed countries.

The nominal dollar price index of 33 non-oil commodities increased by about 20 per cent in 1988, after stagnating for two years. The dollar manufacturing unit value (MUV) index went up by 6.4 per cent during the year. In spite of these gains, real non-oil commodity prices were about 30 per cent below the 1980 level. Prices of tropical beverages were depressed. Export revenues were seriously affected and prospects for improvement are modest.

Minerals and metals enjoyed a price recovery in 1988. The dollar price level of these commodities increased by 40 per cent over the 1987 level.

The average oil price was down by about 20 per cent. But it began to recover after the OPEC production agreement of November 1988.

The high prices of manufactured goods tilted the terms of trade in favour of non-oil producers. Oil exporters experienced a loss of 17 per cent in their terms of trade, while non-oil primary goods exporters registered a gain of about 7 per cent.

In 1988, world trade increased by about 9 per cent in volume. Trade in manufactured goods was particularly strong; it responded to an investment and consumption boom in the industrialized countries. In the developing countries, those countries that had re-oriented their export composition towards manufacturing, together with some metal exporters, had benefited from the trade boom. Exporters of tropical beverages, mostly in Africa, together with the stagnating economies of the highly indebted countries, suffered from a decreased share in global trade.

Despite the progress on tariff-cutting in multilateral trade negotiations under GATT, many non-tariff barriers remain. There was a growing tendency towards voluntary export, restraints and administrative procedures under antidumping laws.

II. ECONOMIC TRENDS IN NORTH AFRICA

The North African subregion is characterized by a great diversity: diversity in economic management and diversity in stages of development. The subregion includes oil importers, such as Morocco and Sudan, and oil exporters, such as Algeria, Libya, Egypt and Tunisia.

Output, in North Africa, grew by 3.4 per cent in 1989, after a mere 0.4 and 2.4 per cent in 1987 and 1988, respectively (Table 1). This growth was also diverse in the countries of the subregion. For example, Morocco had a particularly good economic results, due to favourable weather and government reform measures. The divergence in economic growth is country specific, and can be explained by differing exposures to externally induced shocks, continued low oil prices, growth in oil exports, drought and differing economic policies. Investment has expanded rapidly, while the current account balance has improved.

TABLE 1

Growth Rates in North Africa

	1987	1988	1989
Output	0.4	2.4*	3.4**
Agricultural production	4.08	0.65	4.69

* Revised estimate

** Projections

III. SECTORAL DEVELOPMENT IN NORTH AFRICA

Performance of agriculture was particularly good in 1988 and 1989. Growth rates for agriculture, in the sub-region, had been 4.08, 0.56 and 4.69 per cent for 1986, 1987 and 1988, respectively. The main cause for this good performance had been good weather conditions and the supply response of the farming population to better incentives provided by the policy reforms introduced in recent years. In Morocco, for example, cereal harvest was doubled. Sudan despite damaging floods in 1988, had harvested a crop per 5.3 million tons of cereal, to only 1.7 million tons in 1987.

North African oil exports have, in general, suffered painful losses as a consequence of price slip in 1988 (Table 2).

TABLE 2

Oil Production in North Africa 1984-1988

(Million tons)

	1984	1985	1986	1987	1988	1989*
Algeria	35.20	34.00	30.10	32.00	31.60	29.60
Libya	50.00	50.60	52.00	49.00	50.80	51.00
Sub-Total (OPEC members)	85.20	84.60	82.10	81.00	82.40	80.60
Egypt	41.20	44.30	40.20	45.20	42.60	42.20
Tunisia	5.49	5.40	5.25	4.99	4.80	5.00
Sub-Total (non-OPEC)	46.69	49.70	45.45	50.19	47.40	47.20
TOTAL:	131.89	134.30	117.55	131.19	129.80	127.80

Source: UN Monthly Bulletin of Statistics

* Preliminary figures

The low oil prices have created special problems for Algeria, which increasingly relies on condensates, natural gas and refined petroleum products which are not subject to OPEC quotas. Algeria's gas customers have requested reductions in the price of Algeria gas, in line with those of crude oil. At the end of January, Algeria signed a new contract with one of its main customers, to pay US\$1.30 - 1.97 per million BTU, instead of US\$2.30 contracted.

Metal prices increased slightly. Cotton prices declined sharply and lost nearly 15 per cent on the Liverpool market. This badly hit countries like Sudan, where cotton is a major export product. In contrast, sugar prices were buoyant with an average increase of nearly 50 per cent on the free market. The high prices were apparently the result of severe drought in USA, during the Summer of 1988.

There was no significant change in the structure of North African trade in 1988/89, apart from the fact that the fall of oil prices reduced the share of mineral fuels in total exports.

The countries of the subregion are food importers, and are heavily dependent on cereal imports. For the 1988/89 season, Egypt alone had imported nearly 6.2 million tons of wheat and coarse grains, nearly a third of total African cereal imports. Moreover, because of drought, both Tunisia and Algeria sharply increased imports in 1988.

Recent figures from the 1988 OECD Report on Development Co-operation show that total net ODA flow to North Africa, which has reached \$4.1 billion in 1985, had fallen to \$2.7 billion in 1987. This is an indication of the contraction of resource flows in the subregion. However, new moves have been made to encourage foreign investment to coincide with the privatisation of public companies.

North Africa external debt position worsened in 1980 and it is predicted to become more critical in 1990 and beyond (Table 3). Many of the countries are suffering the double squeeze of rising debt service obligations and collapsing export prices. Rising debt service obligations coincided with the erosion of capacity to service the debt, as prices and demand for subregional exports continued to weaken and its terms of trade to deteriorate. Recent reschedulings and the accumulation of arrears, by a number of countries, have kept the actual debt service ratio well below its scheduled level. This gap between obligations and actual capacity to service debts, reflected in the rising volume of arrears, is putting further strain on the recovery efforts.

TABLE 3

External debt and debt service
in North Africa

	1985	1986	1987	1988*
	Billion of dollars			
Debt	78-9	91.9	100.5	104.2
Debt service	12.3	12.7	12.0	12.4
	In percentage			
Debt service/Export	29.9	49.9	39.2	40.1

* Estimate

Source: ECA Secretariat

IV. COUNTRY PROFILES

Over the past five years, Morocco has undertaken important structural reforms, which, despite difficult circumstances, have lead to considerable progress towards achieving internal and external equilibria. At the same time, Morocco has succeeded in achieving a modest rate of growth with low inflation. It has avoided decline in domestic per capita consumption experienced by other heavily indebted countries, facing a similar deteriorating terms of trade. It has adopted an active exchange rate policy which has helped to maintain, at high levels, proceeds from tourism and worker's remittances. It has also contained import demands following reduction in trade barriers. Budgetary subsidies have been reduced by about 3 per cent of GDP, and public investment has been rationalized. The government has implemented comprehensive tax-reform measures to improve allocation efficiency and to ensure that the tax burden is equitably shared.

In addition to the macro-economic reform programme, reforms have been implemented at the sectoral levels. Consequently, the economy has responded positively. Total exports have increased by about 5 per cent a year since 1984, led by a great rise in the share of manufactured exports, which now represent about 30 per cent of the total. The current account deficit, which was 8 per cent of GDP in 1980, improved to a surplus of 1 per cent in 1988. The fiscal deficit declined from almost 12 per cent of GDP in 1985 to about 4 per cent in 1988. Economic activity is expected to be strong with GDP growth, officially projected at 4 per cent in 1990. But, a widening trade deficit, due to weaker exports and rising import costs, may jeopardise the small current account surplus forecast.

In Algeria, the movement from a centrally planned economy to a more market-oriented system has been eminent. State farms have been privatized - a structure which has resulted in low and stagnant productivity for long time.

Real GDP, after an estimated decline of 1.8 per cent in 1988, was projected to grow by 2-3 per cent in 1989. Export driven growth is expected to be 4 per cent in 1990.

The ongoing investments in hydrocarbon sector will contribute to growth and it may favourably affect related services, such as transport, commerce and communications. The envisaged market liberalization should stimulate economic activity. However, the gradual devaluation of the Algerian Dinar, combined with the reduction in subsidies, will trigger inflation. Efforts to promote local industry imports may increase in 1990. But, with high gas sales and increasing export earnings, the trade balance may be kept in surplus.

Adjustment has been a feature of the Tunisian economy for a number of years. Stabilization measures, initiated in 1988, reduced the budget imbalances and foreign current account and stimulated the conditions for the liberalization programmes. However, despite the measures for adjustment, recent economic achievements have not been favourable. In 1988, for example, the economy was affected by a severe drought and locust infestation that, together caused a 24 per cent reduction in agricultural production, bringing GDP growth down to 1.5 per cent, as compared to 5.8 per cent in 1987. Nevertheless, imports grew modestly and export performance was strong. Consequently, the current account was slightly in surplus. But, hopes of economic recovery in 1989, based on improved performance of the agricultural sector, have faded due to lack of rainfall for the second year in succession. Food imports have risen sharply and so was the cost of imported food. These had a determinantal effect on the balance of payments. Estimated GDP growth was put at 3.5 per cent. The level of foreign currency reserve has sharply fallen, reflecting the sharp rise in the country's import bill.

Production and export of phosphates have fallen, but earnings increased due to recovery of international prices. Production of other minerals registered modest increases.

Power consumption continues to rise sharply. Consumption rose by 6.1 per cent in 1988.

Despite the downturn in the economy, Tunisia's credit rating remains high, the best indeed of any African country.

Economic liberalization in Libya has created a new socio-economic climate. It is expected that earnings from oil exports to exceed \$6 billion in 1989. Libyan price of oil rose to \$19.06/b in September 1989. Also, during 1989, Libya signed a number of new exploration and production sharing agreements with a number of oil companies. The contract for the construction of the second phase of the Great Man-Made River (GMR) went up to a South Korean construction company. The Misurata Steel Complex was opened in 1989, as part of the 20th anniversary celebration, along with 63 other factories; 19 in strategic industries sector, 9 in electro-engineering, 5 in chemical industries and 44 in light industries, including textiles, food products and construction materials.

Libya signed a transport and shipping co-operation with Algeria. This provides for the maintenance of a number of highways, coastal roads, Tripoli harbour and the Tripoli marine port barrier.

Trade with some of the country's leading European partners was rising. For example, strong growth was recorded by West Germany, the purchase from which rose by 32 per cent.

Libyan indebtedness was relatively low, it is less than a tenth of its GDP. It is predominantly short-term and essentially in form of trade financing. Moreover, nearly most of the official loans take the form of export credits or guaranteed supplier credits.

In Sudan, new economic policies have been worked out. Prices of some products have been raised. Self-financing by importers has been denied. Tax revenues are forecast to rise. Sudan's Bank Debts have fallen.

Forecasts for the 1989/90 cotton crop vary. Gold mining has continued to flourish.

Sudan external debts are estimated at US\$15 bn, while its domestic debt stands at S£20 bn. Exports can buy less than 30 per cent of imports and it is believed that the economy has witnessed a negative growth of 4 per cent during the past decade.

A combination of the political environment, unfavourable weather conditions and shortages of inputs may lead to a decline in exports in 1989. Shortage of foreign exchange will prevent any significant growth in consumer goods imports. Trade deficit, which is put at \$1.15 bn in 1989, will probably remain at \$1-1.5 bn in 1990. Meanwhile, the current account deficit, which may have more than doubled to reach some \$700 mn in 1989, could widen still further.

The value of Egypt's foreign exchange earnings, which had increased from \$9.7 bn to \$11.3 bn in 1987/88, dropped to \$6.1 bn in 1988/89. Merchandise exports rose to \$2.7 bn in 1988/89, but imports reached \$10.6 bn, including \$1 bn spent on wheat imports and \$2.1 bn on consumer goods.

In 1989, the government launched dollar bonds to raise \$460 mn to finance development projects. Every six months the bonds will pay a return of half per cent over the London Interbank offered rate.

Fresh discoveries of oil and gas enabled Egypt to raise its estimate of recoverable reserves. Prices of Egypt's oil sales matched tracked the recovery of the international oil market. The stronger revenue should lift Egypt's net oil revenue to about \$1,500 million in 1989 from the low \$750 million in 1988.

Egypt's cotton output in 1989 was more disappointing than in 1988. By raising cotton procurement prices 34 per cent and offering premiums for early planting, the government hopes to reserve the steady downward trend of recent years.

The area to be sown wheat is to be greatly increased and productivity to be raised by developing new wheat strains. However, farm-gate prices for wheat are still 20 per cent less than world prices. Farmers have tended to reduce acreage planted to wheat since actual production costs have exceeded crop prices.

The price of sugar cane paid to farmers has been raised to combat another chronic shortage.

V. ARAB MAGHREB UNION (AMU)

The consolidation of links within the Maghreb countries continues to maximize the economic and political potentials of the Arab Maghreb Union. The governments are also pursuing individual policies of strengthening ties with the West - in particular the EEC.

The inaugural session of a fifty member consultative Assembly, formed of ten deputies from each state, was held in Algeria in June 1989. The assembly approved by laws, and in a statement called on all political and professional organisations, in the five countries, to intensify contacts to promote unity. It is especially urging co-operation in education, culture, information and joint economic ventures. The last item was high on the agenda when ministers of industry from the Maghreb countries held a meeting later in Tunis. Harmonization of economic legislation was given high priority, to promote the development of regional industrial structures. A working group was set up to draw up new laws covering inter alia customs transactions, investment, and the role of public and private sectors in industrial projects.

The upgrading of transport links, throughout North Africa, has emerged as a priority. An early success was scored in June with the resumption of the direct passenger rail service between Tunis and Casablanca. Air links, in the subregion, are also to be upgraded, following the agreement of all five AMU countries to establish a jointly owned airline, AIR MAGHREB.

Agreement was reached between Tunis and Algeria on ways of harmonizing regulations concerning freight and passenger transport between the two countries and on the modernization of the Algerian-Tunisian railway line. The passenger coach service due to open soon, linking the two countries, was discussed too.

VI. CONCLUDING REMARKS

Economic performance in the subregion, in 1990, will depend on both the external and internal environment. Weather conditions, debt servicing and the overall economic conditions in the main trading partners of the countries in the subregion are important factors. The exported price level of oil and the flow of resources are prime factors that are shaped by the world economy.

Growth prospects for 1990 look fair. A good agricultural performance is anticipated in 1990. The manufacturing sector offers a mixed picture with structural problems. However, investment in this sector continues to grow inflation and debt will remain a matter of concern. High interest payments on external debt will contribute to keeping the current payments position in red.

Economic recovery calls for an integrated approach to the issue of resource flows. Debt, primary commodity export, interest rates, official development assistance and other direct transfers need to be dealt with simultaneously and in the complex interrelationships to ensure that adequate resources are available for implementing recovery programmes.

Economic integration is required for quick recovery and long-term development. North Africa seems to be well suited for economic integration. The subregion is essentially one geographical unit with fairly homogeneous population. It is not divided by a natural barrier. Furthermore, infrastructure links between most countries in the subregion are adequate. North Africa has long experience in joint production and has considerable scope for similar projects.

Integration efforts have to be comprehensive, covering the essential areas of infrastructure, production and trade. There is a need for the countries of the subregion to move closely together. Progress on integration projects will be slow.

APPENDICES

APPENDIX I
NATIONAL ACCOUNTS STATISTICS
IN NORTH AFRICA

North Africa (6 countries)

	1980	1981	1982	1983	1984	1985	1986	1987	1988
Government consump.	20.163	20.335	7.841	25.527	25.293	27.345	27.373	23.525	30.043
Private consumption	57.554	69.393	9.843	74.382	75.895	73.425	80.577	32.405	84.143
Gross fixed cap. f.	36.653	37.543	5.022	37.233	37.352	35.443	35.875	34.242	35.717
dST	2.953	3.760	.191	.726	1.290	1.153	.713	.133	-.892
Exports	53.515	44.415	14.041	49.574	43.043	50.803	47.523	43.631	49.557
Imports	49.403	51.422	12.435	48.801	43.555	48.535	43.127	39.243	33.654
GDP	131.653	124.033	25.503	133.743	142.920	147.393	150.544	155.795	159.303
Agriculture	15.195	15.475	15.415	15.113	15.591	16.493	13.039	15.345	13.505
Mining	42.301	31.905	32.423	32.581	33.740	34.595	37.407	37.135	35.505
Manufacture	59.424	37.393	15.455	14.153	15.077	15.797	15.350	17.133	17.353
Electricity + water	1.237	1.270	1.723	1.901	1.935	2.151	2.445	2.553	2.775
Construction	11.717	11.619	12.037	11.811	11.937	12.493	7.191	5.430	5.303
Public administr.	5.975	5.334	15.055	15.698	15.657	17.273	12.120	12.143	12.547
Social services	39.541	41.120	43.403	51.320	53.153	54.512	53.601	53.255	53.430
GDP (Factor cost)	170.495	156.761	125.534	126.635	131.503	135.653	145.544	144.525	147.472

Source: ECA secretariat.

Algeria

APPENDIX I
NATIONAL ACCOUNTS STATISTICS
IN NORTH AFRICA

	1960	1961	1962	1963	1964	1965	1966	1967	1968
Government consump.	1.435	1.525	.000	7.645	3.030	3.495	5.551	3.693	3.545
Private consumption	17.525	18.233	.000	20.704	21.611	22.706	22.015	21.145	21.385
Gross fixed cap. f.	14.232	14.199	.000	15.833	17.491	17.624	17.075	15.351	15.556
DST	2.243	3.326	.000	1.393	1.153	.322	.490	.140	.000
Exports	14.713	13.409	.000	19.512	13.273	13.639	17.027	13.151	13.507
Imports	12.855	13.458	.000	15.615	12.005	15.925	13.313	11.156	12.251
GDP	37.423	38.294	.000	49.833	50.815	52.752	53.565	53.532	53.345
Agriculture	3.365	3.282	3.112	3.043	3.335	4.235	4.473	4.777	4.545
Mining	13.527	13.242	14.044	14.275	14.555	15.340	15.515	15.350	15.972
Manufacture	3.541	3.780	4.381	4.850	5.357	5.352	5.712	5.451	5.375
Electricity + water	.324	.335	.425	.454	.303	.557	.591	.555	.512
Construction	5.250	5.124	5.843	6.351	6.557	6.700	.553	.553	.535
Public adminstr.	.000	.000	5.690	6.030	5.394	6.610	.000	.000	.000
Social services	3.490	3.599	14.925	15.790	15.525	17.133	23.001	21.545	13.795
GDP (factor cost)	34.605	35.544	42.731	44.800	47.144	45.577	45.952	45.252	47.835

Sources: ECA secretariat.

APPENDIX I
NATIONAL ACCOUNTS STATISTICS
IN NORTH AFRICA

Egypt

Government consump.	1930	1981	1982	1983	1984	1985	1985	1987	1988
Private consumption	4.705	5.244	.000	4.593	4.755	4.922	5.304	5.557	5.638
Gross fixed cap. f.	16.554	17.714	.000	18.233	19.255	20.273	21.034	21.954	22.504
DST	5.717	7.441	.000	6.953	7.543	8.055	8.603	9.192	9.954
Exports	.000	.000	.000	.099	.050	.053	.103	.000	.000
Imports	3.257	7.853	.000	8.617	3.245	8.593	8.350	3.473	3.391
GDP	12.075	12.555	.000	10.739	10.738	11.510	11.923	11.503	11.525
Agriculture	24.743	25.374	.000	27.755	29.067	30.391	31.745	33.165	34.562
Mining	4.900	4.357	4.571	4.586	4.717	4.705	4.861	5.001	5.141
Manufacture	4.435	4.385	4.073	4.670	5.349	5.173	5.725	5.954	5.777
Electricity + water	3.053	3.281	3.257	3.493	3.815	4.155	4.453	4.733	5.123
Construction	.224	.242	.217	.245	.258	.305	.410	.451	.484
Public administr.	1.037	1.154	1.270	1.359	1.450	1.650	1.725	1.934	1.953
Social services	1.334	2.135	1.972	2.035	2.205	2.381	2.567	2.735	2.934
GDP (factor cost)	9.051	9.757	9.704	10.305	10.927	11.705	11.972	12.713	13.369
	22.761	24.147	23.097	24.653	25.533	27.711	29.213	30.305	31.577

Source: ECA secretariat.

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APPENDIX I
NATIONAL ACCOUNTS STATISTICS
IN NORTH AFRICA

Libyan Arab Jamahiriya

	1980	1981	1982	1983	1984	1985	1986	1987	1988
Government consump.	7.341	7.354	7.841	7.254	7.190	7.143	7.143	7.743	7.735
Private consumption	3.692	9.295	9.543	9.211	9.292	9.403	9.570	11.343	11.720
Gross fixed cap. f.	3.361	6.472	6.022	4.554	4.804	4.275	3.345	3.211	3.433
dST	.321	.156	.131	.200	.000	.000	.000	.000	.000
Exports	22.063	14.246	14.041	14.041	14.074	14.514	11.063	11.059	11.537
Imports	12.675	13.004	12.435	10.961	12.315	9.631	5.777	5.751	5.249
GDP	35.727	30.943	30.320	28.464	23.580	29.237	23.675	27.925	23.581
Agriculture	.546	.523	.633	.694	.667	.721	.790	.790	.807
Mining	22.779	12.240	12.515	11.691	11.760	12.152	14.114	13.271	13.517
Manufacture	46.573	.700	.655	.764	.841	.854	1.297	1.411	1.543
Electricity + water	.157	.173	.152	.192	.193	.203	.359	.335	.444
Construction	3.092	3.035	2.612	1.693	1.537	1.486	2.524	1.931	1.711
Public administr.	3.174	3.002	3.093	3.139	3.243	3.243	4.034	3.810	3.921
Social services	7.514	7.128	5.951	6.822	5.524	5.994	3.075	3.695	3.793
GDP (factor cost)	34.913	30.943	30.209	27.973	27.635	28.467	23.150	23.493	21.120

Source: ECA secretariat.

APPENDIX I
NATIONAL ACCOUNTS STATISTICS
IN NORTH AFRICA

MOROCCO

	1980	1981	1982	1983	1984	1985	1986	1987	1988
Government consump.	3.521	3.493	.000	4.249	3.853	4.037	4.303	4.405	4.234
Private consumption	11.570	11.474	.000	12.340	12.649	12.930	13.323	13.525	13.975
Gross fixed cap. f.	3.680	3.671	.000	4.005	3.762	4.001	3.872	3.952	4.223
dST	.303	.195	.000	-.654	.152	.370	1.103	-.012	-.840
Exports	3.327	3.733	.000	3.832	3.812	4.049	4.163	4.983	5.173
Imports	4.318	5.542	.000	4.354	5.205	5.297	5.404	5.509	4.250
GDP	17.483	17.230	.000	16.905	19.230	20.140	21.351	21.359	22.599
Agriculture	3.032	2.374	2.985	2.875	2.867	3.213	3.551	3.417	3.955
Mining	.316	.301	.810	.870	.923	.905	.853	.850	.957
Manufacture	2.853	25.273	3.051	3.170	3.115	3.173	3.280	3.345	3.612
Electricity + water	.213	.216	.653	.691	.694	.715	.693	.750	.810
Construction	1.093	1.067	1.343	1.275	1.213	1.285	1.153	1.095	1.250
Public adminstr.	2.142	2.346	2.673	2.695	3.053	3.270	3.530	3.715	3.810
Social services	7.043	7.273	9.721	10.027	10.425	10.351	11.412	11.721	12.373
GDP (Factor cost)	15.105	14.775	15.553	15.903	19.233	20.140	21.351	21.179	22.982

SOURCE: ECA secretariat.

APPENDIX I
NATIONAL ACCOUNTS STATISTICS
IN NORTH AFRICA

Sudan

	1980	1981	1982	1983	1984	1985	1986	1987	1988
Government consump.	1.298	1.350	.000	1.220	.757	1.029	.973	1.182	1.117
Private consumption	5.792	5.974	.000	7.573	7.300	5.310	7.061	7.643	7.120
Gross fixed cap. F.	1.194	1.277	.000	1.553	1.304	1.288	1.092	.877	1.292
dST	.000	.000	.000	-.307	-.147	-.003	.056	-.033	-.114
Exports	1.603	1.524	.000	1.236	1.133	1.175	.937	.706	.732
Imports	2.838	2.785	.000	2.118	1.552	2.136	1.711	1.705	1.939
GDP	3.246	3.623	.000	9.154	5.795	7.661	3.359	3.671	3.903
Agriculture	3.075	3.207	2.929	2.706	2.639	2.022	2.555	2.707	2.777
Mining	.072	.072	.003	.009	.005	.011	.011	.013	.013
Manufacture	.592	.623	.003	.579	.572	.575	.597	.629	.535
Electricity + water	.145	.155	.115	.143	.154	.177	.190	.193	.205
Construction	.420	.429	.424	.505	.433	.730	.583	.647	.630
Public administ.	.835	.684	.583	.584	.597	.672	.721	.630	.615
Social services	4.133	4.329	4.155	4.283	4.197	3.472	3.571	3.713	3.770
GDP (factor cost)	8.444	8.522	8.157	8.225	7.995	6.397	7.513	7.302	3.030

Source: ECA secretariat.

Tunisia

APPENDIX I
NATIONAL ACCOUNTS STATISTICS
IN NORTH AFRICA

	1933	1981	1982	1933	1934	1935	1935	1937	1933
Government consump.	1.253	1.363	.000	1.555	1.543	1.713	1.505	1.741	1.730
Private consumption	5.353	5.704	.000	5.257	5.573	6.743	5.914	5.335	7.037
Gross fixed cap. f.	2.425	2.421	.000	2.859	3.052	2.500	2.285	2.043	2.151
DST	.091	.083	.000	.000	.057	-.074	-.053	.093	.052
Exports	3.513	3.671	.000	3.435	3.511	3.927	3.517	4.234	4.515
Imports	3.983	4.033	.000	4.454	4.595	4.084	4.000	3.913	4.133
GDP	8.557	9.277	.000	9.672	10.150	10.730	10.553	11.141	11.415
Agriculture	1.225	1.233	1.130	1.210	1.365	1.602	1.407	1.654	1.253
Mining	.672	.654	.975	1.064	1.042	1.007	1.012	.973	.950
Manufacture	.591	.730	.190	1.237	1.373	1.453	1.511	1.555	1.670
Electricity + water	.134	.143	.151	.155	.173	.190	.193	.210	.223
Construction	.755	.800	.605	.617	.627	.637	.541	.514	.513
Public adminstr.	.335	.364	1.054	1.114	1.153	1.402	1.217	1.237	1.255
Social services	3.405	3.628	3.341	4.094	4.180	4.105	4.570	4.852	5.293
GDP (factor cost)	6.392	7.229	3.042	3.437	3.755	3.012	3.240	3.773	3.927

Source: ECA secretariat.

APPENDIX II

ELECTRICITY PRODUCTION IN SOME NORTH AFRICAN COUNTRIES 1984-1988

(In gigawatt-hours)

	1984	1985	1986	1987	1988
Egypt	27 800	30 000	32 300	36 053	40 200
Libyan Arab Jamahiriya	7 500	7 600	7 112	7 685	7 900
Morocco	6 401	6 770	6 928	7 256	8 628
Sudan	1 209	1 218	1 316	1 408	1 857
Tunisia	3 812	4 055	4 215	4 546	4 359

Source: UN Monthly Bulletin of Statistics