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Agro-food production, consumption, trade and market policies in the Mediterranean

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1. The processing industry

Growth in agro-food production was subdued with in most Mediterranean countries. The growth rate was lower than the previous year but higher on average than the rate registered in the manufacturing industry as a whole. The difficult economic climate marked by a slowdown in the economy in most countries, due to low internal and external demand, and the decrease in the supply of agricultural commodities, which resulted in rising prices, are the factors which influenced agro-food production. The increase in the average price of agricultural raw materials and energy resulted in a downward trend in financial performance.

Morocco

Production in the agro-food industries in Morocco developed at an appreciably lower rate than the overall GDP growth rate in 2003 (3.8% compared to 5.2%), but this rate was nevertheless slightly higher than the average non-agricultural GDP rate (3.2%). We have already mentioned that, with regard to the processing industries as a whole, the agro-food industries developed quite favourably, at least compared to the previous year: by achieving a growth rate almost as high as the rate in the industrial sector as a whole (3.7%), they nevertheless performed appreciably better than in 2002, when their growth rate was only 1.9%.

There are 1 767 establishments in the agro-food industries (AFI), i.e. 23% of the total number of industrial units in the country. These firms achieved almost one-third (32.6%) of the total output of industrial products and contributed one-fifth (20.4%) of total industrial exports. The AFIs also accounted for one-quarter of industrial investments and employed almost 50% of the workers employed in the processing industry. Employment figures have been tending to drop in the agro-industrial sector, and there seems to have been another marked decrease this year, since the employment figure is under 64 000.

The agro-food industries in Morocco: subdued growth

The slight increase in the output of the agro-food industries was the result of a sharp decrease in the manufacture of chocolate and confectionery products (-13.9%), a less marked decrease in grain-mill product output (-1.2%) and a very slight upward trend in the sugar industry (2%), and in the baking, confectionery and biscuit industry (1.6%). The growth rates in the components of the other food industries where appreciably higher growth rates than in the latter industry were achieved varied widely with quite distinctive trends in some cases. Their respective growth rates were high - sometimes almost 19%, as was the case with canned products, fruit and vegetables and vegetable or animal fats, where the growth rate was 12%. There was a sharp downturn, on the other hand, in other components such as the manufacture of animal feed (-7.7%). Growth was less marked in the other activities in this sub-sector. Milk production increased by 5.1% and canned fish and other canned seafood output grew by 2.6%, whereas output stagnated in the manufacture of various other foodstuffs. Output in the beverages and tobacco industry increased by 2% between 2002 and 2003. This subdued growth was registered despite the satisfactory performance in the production of beers and malt and of spirits, where the growth rate was 4.1% in each case. Tobacco output increased by 2%.

Source: Centre Marocain de Conjoncture, *Bilan économique et social 2003, Bulletin n°27, Rabat, June 2004.*

¹ This analytic note is an extract of the CIHEAM *Agri.Med 2005*.

With regard to the production criterion, the structure of the food industries (exclusive of the tobacco industry) in 2002 was dominated by production units processing staple commodities: cereals and by-products accounted for almost one-third of the entire output (32%), milk and milk derivatives 13%, fats 11% and sugar 10%. It is observed that these industries are essentially geared to satisfying domestic demand and that exports – where they exist – account for only a marginal share (less than 5%). This is also the case with the beverages and meat industries (the latter are virtually in embryo, accounting for barely 1% of total output). The fish industry, on the other hand, which accounted for an appreciable share of total output (14%), is geared 90% to exports. The same applies, although to a lesser extent, to the fruit and vegetable processing industry, which contributed 5% of total output, two-thirds of which, however, was for external markets.

Italy

The Italian food industry confirmed its position in 2003 as the second leading manufacturing industry in the country. In a difficult economic climate of marked stagnation, the industry registered a 1.3% increase in production by the end of the year, whereas there was an overall decrease in production of 0.8% in Italian industry as a whole.

Despite a drop in exports, the turnover of the food industry in 2003 remained at the same level as in 2002, amounting to €103 billion; this was the fruit of the work of some 36 900 firms, most of which are small and medium-sized enterprises (6 910 of these employ more than 9 workers) and some 440 000 workers (273 000 of whom are employed in firms employing more than 9 people).

The value added of the food industry progressed by 5.9% compared to the previous year, amounting to almost €34.851 billion, approximately 11% of the added value of the industrial sector and 20% of that of agro-food system as a whole.

The most significant variations in turnover in the various components making up the agro-food sector concerned the meat industry, particularly poultrymeat (+19.5%), the fish industry (+15.2%) and the confectionery industry (+11.2%). Other variations in turnover, somewhat less marked, concerned soft drinks (+6.3%) and canned vegetables (+6.1%). Sizeable negative variations were registered on the other hand for sugar (-25.2%) and wine (-25.2%).

With regard to prices, 2003 was a difficult year due to the controversy over real inflation and inflation as perceived by consumers. In this context, the average of the producer prices of food industry products rose by 2.8%, which was barely higher than inflation rate (2.7%) and at all events lower than the increase in consumer prices, which was 3.1%. This sector's contribution to the rise in inflation rate was thus marginal; the reasons for that increase are to be sought in the structural deficiencies of the distribution chain.

The increase in foodstuff consumer prices, which rose steadily in the last few months of 2003, was due to a large extent to the trend in the fresh products sector. With a 3.1% increase in the annual average, fruit prices actually rose by 5.6% and vegetable prices by 4.7%.

In addition to this, the crisis and the financial scandals which shook the two major Italian food industry groups, Cirio and Parmalat, must also be mentioned. These affairs were the result of disappointing industrial management – partial insolvency of the industrial groups was brought to light, a factor that was aggravated by not exactly legal operations affecting not only the industrial system and employment but also a large number of agricultural producers. The activities of the Italian agro-food group Cirio, which focus on the production of tomato derivatives, sauces and fruit juices, accounted for a turnover of over €240 million and concerned 800 employees and over 3 000 farmers producing the primary commodities. In the milk products sector, Parmalat achieved a turnover of €950 million in Italy, employing 2 250 people.

Portugal

In Portugal, meat and poultrymeat production dropped by 12.1% compared to the previous year due to the nitrofurans crisis, which started in March and affected all of the sectors in the chain from breeding (eggs) right down to slaughter. Turkey meat was the sector worst affected, registering a decline of 21% compared to 2002. A decrease was also registered in the output of the other poultry products – ducks, free-range chickens, etc. – but it was less marked.

Milk production also followed the downward trend of several other agrifoodstuffs. Total cow's milk output was 1.919 billion litres, a 6% decrease compared to the previous year; this can be explained by the fact that production quotas were exceeded in the course of that farm year (2002-2003). The trend was different as far as the other types of milk are concerned: there was an increase in ewe's milk output (+1%), whereas a decrease was registered in goat milk production (-3%).

France

In France, the activities and turnover of the agro-food industries stagnated in 2003. Although the index of industrial AFI output for the sector as a whole remained virtually constant (+0.2%), the results in the individual sectors were very mixed. Due to the heat wave, the beverages and fruit juice sectors achieved by far the best results (+2.2% and +9.6% respectively). Results in the meat sector were mixed: a downturn in poultrymeat production (-4%), where major restructuring measures were carried out, but marked growth in meat preparations and prepared meat products. The milling and dairy industries suffered from the decrease in raw material output (-0.7% in both sectors). Similarly, animal feeds were affected by the drop in demand for off-land agricultural commodities, despite the rise in demand for cattle feed from the summer onwards, but also, curiously enough, by a drop in the demand for pet food, which accounted for 10% of total tonnage (approximately 2 million tonnes), and much more in value. And finally, sugar production suffered from the poor sugar beet harvest.

Prices in the sector rose by 1.2% on average, with fairly comparable trends in the various sub-sectors; fats prices were the only ones to drop, due to the downward trend in oilseed prices. Unlike the situation in the other industrial sectors, the AFI's continued to create jobs, but at a very slow rate. The number of wage earners increased by 900 in the sector as a whole, i.e. +0.2%.

The prospects for 2004 are fairly grey, since consumption stagnated towards the end of the year with no sign of recovery.

Contrary to the previous years, the "provisional" results of the 2003 annual survey of enterprises in the AFIs were published in mid-2004. This is a survey which covers firms employing 20 workers and more and produces data on structures and results.

There was a slight increase in the turnover achieved by these firms (+1.1%). Exports stagnated (+0.2%), with very poor results in the meat sector (-4.2%); there was a very slight decrease in the number of persons employed (so it was actually the crafts sector that was more concerned in business start-ups). The most worrying figures were those for investments, which decreased in all sectors except in the dairy industry and in the fruit and vegetable processing sector, where several major operations were observed. The overall result was -4%, better than the result achieved in the rest of the industry (-8%) but still a long way from the figures achieved in previous years, when the AFI's were one of the most dynamic industrial sectors.

Greece

The largest processing sub-sector in Greece is the food and beverages industry. It is considered to be the most dynamic sector, but 2003 was a poor year. With regard to the food processing industry in particular, net profits amounted to €157 467 000, down by 26.7% compared to 2002. The overall poor performance of the food industry can be explained by two main factors: first, the considerable reduction in agricultural production during the last two years due to adverse weather conditions and, secondly, the fact that a number of industries that were profitable in previous years, registered high losses in 2003. Overall, the volume of food and beverages output was down by 3.2% in 2003.

The beverages industry on the other hand performed significantly better, increasing net profits by 32.4%. The tobacco industry had a very bad year, and the picture in the textile industry is equally negative: this once thriving sector, of crucial importance to the domestic economy, is today faced with adverse circumstances due to more competition from third countries (mainly from Far East countries) and the sharp decline in world prices, and the outlook for the future is not good.

When one analyses the Greek food industry in greater depth, the results of the 346 largest companies in 2003 are worthy of note. Total net profits dropped 15% from € 345 million in 2002 to €293.6 million in 2003, whereas total sales increased slightly by 3%, amounting to €7.2 billion. The domestic food industry can be separated into 2 distinct categories: despite the fact that profits were down in 10 out of 19 sub-groups, the 272 profitable companies increased their profits by 13.1% on average to €427 million,

whereas the losses of the remaining non-profitable firms increased to a much greater extent (312%) – to almost €134 million.

Spain

The gross output of the Spanish agro-food industry reached a value of €62.116 million in 2003, which represents an increase in current prices of 5.5% compared to 2002. When measured in constant prices, it represents a 3.0% increase, which can be regarded as favourable, since from 1998 onwards the data indicated only slight increases or even decreases in gross output.

As we mentioned in last year's report, one of the main characteristics of the industrial sector in Spain is the relatively high percentage of small and medium-sized enterprises. As a matter of fact, in the agro-food sector only 3.39% of the firms have more than 50 employees, many of them being family-owned and managed firms. These firms tend to concentrate mainly on the domestic market, a fact which is a short-coming on a global market and a threat for the future performance of businesses.

As a further example of the disadvantages of the small size of firms, consumption data indicate that 21.6% of final food expenditure was effected on retailer brand products in 2003 (9.1 percent points above the 2002 figures). Since the profit margins of firms are smaller with products of this kind, larger-scale food industries could improve their negotiating capital with retailers and thus improve their profitability.

As regards the sub-sectors, higher output values were achieved in the meat, alcoholic beverages and dairy products sub-sectors. Employment is more evenly distributed, on the other hand, although the bakery sub-sector accounts for almost one-quarter of total employment and the meat industries about one-fifth.

Turkey

The agro-food industry in Turkey is export-oriented and is growing faster than the overall growth rate: between 1995 and 2002 the economy grew by 2.8% and food processing by 3.2 %. The share of food processing in GDP has thus increased in the last 15 years from 4.6% to 4.8%. By 2002, the food industry accounted for 20% of the total output of the manufacturing sector; it employs more than 100 000 registered workers and technical staff.

The agro-food processing industry ranges from small individual firms to large and small cooperatives and multinational firms. There are also small to modest-sized specialty and craft businesses that offer limited but high-quality products, often using traditional methods and recipes. The number of firms has increased by 25% since 1994 to a total of 28 000 with the following product breakdown: grain-mill and pasta products 65%, milk and dairy products 11%, processed fruits and vegetables 12%, vegetable oil 3.5%, sugar 3% and meat processing 1%. However, there are 2000 relatively large firms with advanced technologies accounting for a considerable amount of foreign direct investments, which are concentrated mainly in the milk product, vegetable and fruit processing sectors.

Pastry and milling industry products: wheat flour, semolina, bulgur, bread, macaroni and biscuits account for approximately half of the agro-industrial output value. The industry has its strengths and weaknesses. Its strengths as listed by the State Planning Office are: easy access to raw materials, a relatively cheap and even qualified work force, a large domestic market, proximity to developing markets, and prospective EU accession. Its weaknesses are: insufficient integration and cooperation between agriculture and industry, problems of quality and capacity utilisation, and an inadequate food control system.

Egypt

The contribution of the public sector to the food industries in Egypt has continued to decrease over the last few years. The number of units in that sector as well as the value of their production has also steadily decreased – by 19% and 65.8% respectively in the period from 1999 to 2001 – due to the growing contribution of the private sector from year to year. This is basically the result of the privatisation programme which has been implemented over the past few years, and which includes the privatisation of increasing numbers of State enterprises as well as the absence of new investments in that sector.

On the other hand, the number of employed and the employment rate, the value of production, the value added as well as the number of units have decreased during the same period within the State industrial sector and the rest of the public sector.

Milling, baking, and the production of dairy products and oils are considered the major activities in the public food industry sector, even though they are suffering the impact of the privatisation programme. The value of the economic indicators for these industries has decreased steadily from one year to the next. There are no detailed data of food industry activities in the private sector.

Lebanon

The agro-food industry is the most important sector of Lebanese industry, accounting for 20% of industrial enterprises and contributing 26% of GDP (Tmasin and Trifiro, 2002). The sub-sectors include traditional products such as alcoholic beverages (wine and arak), confectionery, canned fruit and vegetables, bakery products and olive oil.

New plants have been registered in recent years producing potato crisps and snacks, dairy products, frozen food, and vegetables, as well as feed mills and poultry breeding centres. According to the Directorate General for Industry, 824 new factories were established in 2002 (as against 599 in 2001), employing 6 721 persons (4 425 in 2001). The breakdown of newly registered factories by product category shows a preponderance of food and beverages, accounting for 24.7% of the total. The food and beverage industry considered to be an important economic sector; it accounts for 4.2% of total exports. However, there is a continued need to focus on standards and technical specifications, which can only be done by investing in technological innovation, automation and quality control in processing plants.

The fruit and beverages processing and preservation sub-sector accounts for around 4% of the total food and beverage sector (160 establishments), while bakeries represent 48% of the total and confectionery industries 22.5%. Some 150 companies have a production capacity which enables them to export.

The most important areas of production are processed foods such as pickles, jam and pre-packed foods, with 132 companies operating in this sector. Another 35 companies, mostly in the Bekaa valley, produce dairy products.

However, for many industrialists in this sector, the problems the industry is facing are due to policy and lack of financing, low technology and high taxes on raw materials – around 80% of the raw materials used by the food industry being imported.

2. Food consumption

There was stagnation in food expenditure overall, particularly in the EU countries due to rising prices and the stagnation in the economy as a whole. Some improvement was observed in food quality and food distribution in the southeast Mediterranean countries, indicating a narrowing of consumption disparities between the various regions and the various socio-economic classes. A problem was observed in foodstuff prices in the EU countries: on the one hand, the consumer price indexes showed a sharp rise in real terms of 4% to 5%, whereas on the other hand the producer prices of agricultural commodities dropped in real terms. This problem still has to be resolved in most EU Mediterranean countries, which have set up price monitoring committees.

Algeria

In Algeria, the National Statistics Office issued new figures in 2003 concerning the "household consumption budget 2000". They show on the whole, as regards total household expenditure, that inequalities have diminished on the one hand and that the gap between rural and urban areas has not widened, since annual per capita expenditure increased by very similar rates in both areas in the period from 1988 to 2000. All of this would mean that the policies pursued during the decade did not basically harm rural areas and were thus fairly balanced between the two environments. This testifies to a type of development which contrasts with what is observed in most developing countries, where structural adjustment policies (such as those pursued in Algeria in the period from 1990 to 2000) widen the gaps between the rural and the urban world.

The results of the "household consumption budget 2000" survey in Algeria

The same reduced gap was observed between the urban and the rural world in terms of growth in food consumption: Per capita food consumption increased by 478% in the former and by 444% in the latter in the period from 1988 to 2000. It is interesting to note that food consumption accounts for 43.7% of total expenditure on average in the rural world and 45.1% in the urban environment. Does this mean that the rural world is "richer" than the urban world? It would seem so, since another curious factor has also been observed which would indicate this: the decile 10 group (the richest) devotes 26.6% of expenditure to food in the rural world and 40.6% in the urban world.

In constant terms (obtained by deflating by the general price index), total per capita household expenditure would seem to have decreased more in rural areas (-17%) than in urban areas (-8%) between 1988 and 2000. The relative impoverishment is thus greater in rural areas than in urban areas. The decrease in per capita food expenditure was greater than the decrease in total expenditure both in rural areas (-27%) and in urban areas (-22%). Thus, although total per capita consumption was less in 2000 than in 1988, the consumption pattern changed in structure at the expense of food expenditure.

Analysis by decile shows that decile 1 (the poorest) increased total per capita expenditure much more in the urban environment (+21%) than in the rural environment (+6%). Per capita total consumption decreased sharply, on the other hand, in decile 10 (the richest) (-15% in the urban environment and -23% in the rural environment), food consumption thereby decreasing less in urban areas (-7%) than in rural areas (-39%). It would thus seem that, compared to the urban figures, non-food consumption in rural areas has caught up, particularly in the case of the richest decile.

In 2002, the general consumer price index (GPI) for foodstuffs was considerably lower than the general price index with a variation of 1.8% (compared to 2.2% for the GPI). The opposite was the case in 2003, when the general index rose by 3.5% and the foodstuffs index rose by 4.5%.

When all foodstuffs are taken into consideration it is observed that the products with the most marked price increases were local products, whereas there was generally a downward trend in the prices of imported goods. There was a price variation of -3.3% in the "Sugar and sugar products" group, for instance, and a variation of -2.2% in the "Coffee, tea and herb teas" group. Prices remained stable or showed a slight positive variation in the case of the other groups of products, which are mainly imported.

The sharpest price increases concerned animal proteins. Increases in the "Poultry and eggs" and "Fresh fish" groups were practically identical: +18.7% and +18.1% respectively. The "Meat and sheep offal" group followed with a variation of +11.3% and the "Beef and veal" group with +7.4%. The sharp rise in red meat prices continued at the beginning of 2004; this is to be explained by livestock retention on the part of extensive farmers, who were taking advantage of natural grasslands (promoted by good rainfall) to fatten their animals and build up their herds. The other explanation of the increase would be the fraudulent export of animals to Tunisia and Morocco, whereby farmers are interested in the traffickers' offer of payment in euros (Aouzelleg, 2004).

Italy

In Italy, there was a decrease in the quantity of foodstuffs consumed and at the same time a sharp increase in the consumption of soft drinks and alcoholic beverages (+6.8% in volume), particularly in the third quarter due to the summer heat wave, and, in the last quarter, a 2.5% increase in the quantity of fish consumed. A decrease was registered on the other hand in the consumption of pasta, meat, bread, milk products, oils and fats, sugar, salt, tea, coffee and wines. At the bottom of the list, the downward trend in the consumption of fruit and vegetables was confirmed and is likely to continue further: the 1.1% decrease in purchases in the last quarter was in fact the continuation of the downward trend registered in the previous quarters. The drop in consumption is to be attributed to several factors. The lifestyle of Italian households, which has changed profoundly, non-domestic consumption, and a lighter diet have together significantly modified domestic consumption. What is more, the bad weather conditions which hit the country caused a sharp rise in the price of fruit and vegetables and also affected oil and wine production. And last but not least, the acceleration of inflation and the introduction of the euro contributed further to the decrease in consumption.

Greece

Food consumption in Greece accounts for around 16.5% of total consumption. In 2003, foodstuff consumer prices continued to rise at a significantly higher rate than the overall Consumer Price Index (CPI): the CPI increased by 3.5%, whereas the food index increased by over 5% and the drinks index by 4%.

It was also emphasised in last year's report that rising food prices have become a matter of national concern. In the course of 2003, officials stepped up efforts to reduce price increases for major consumer products including food products, but not always with the same success. Although food prices in 2003 did not increase as much as in 2002, the cumulative increase over the last 3 years is believed to have dramatically changed the way Greek consumers purchase food products: own-label products in retail chains are rapidly gaining market shares at the expense of well-known manufactured products, since the former are sold at a considerable discount. In 2003, the major food products registering the highest price increases were potatoes (19.2%), poultry meat (7.3%), fresh fish (5.3%), sweets/confectionery (4.8%), olive oil (4.3%), juices (3.8) and fruit and dairy products (3%).

Per capita consumption of fruit and vegetables in Greece is amongst the highest in the European Union. On the other hand, meat consumption (around 90 kg) is well below the EU average, with the possible exception of poultrymeat. Sheep and goat meat consumption is around 13 kg, while the self-sufficiency rate is around 90%. Per capita consumption for beef and pigmeat is considerably higher (22 kg and 26 kg respectively), but self-sufficiency rates are very low (27% and 48%).

Spain

In 2003, total food expenditure in Spain amounted to €69 406 000, 4.8% higher than in 2002 – but only 1% in real terms. Every household spent €1 226 per capita. This household expenditure accounts for €50 716 000 and is the main factor responsible for the growth in total food expenditure. According to the breakdown of household expenditure by product, meat products rank highest in absolute terms (€12 200 000), while the next products in the ranking are fishery products, milk and other dairy products, fresh fruit, fresh vegetables, bread and pulses. Although there is a certain degree of stability in this ranking, some products have increased their share in the household food basket. Indeed, in relative terms, comparison with 2002 expenses shows that the main increases occurred in the case of beer, fresh fruits, prepared foods, mineral water and soft drinks, while the total expenditure on other products such as fresh potatoes and table wines dropped, despite the general rise in food expenditure.

One notable event was a heated controversy amongst actors in the agro-food chain over the vegetable prices during the summer of 2003. While consumers claimed that market price levels were unprecedented, farmers were protesting at the very low prices they were being paid. In fact, the CPI was severely affected by vegetable prices in those months, and the government started to monitor middlemen's margins through the "Prices Observatory" set up by the Ministry of Agriculture, Forestry and Fisheries.

As prices dropped the situation calmed down, but new problems could arise, since the differences in market power between primary demand and supply remain unchanged.

Turkey

Turkey can be regarded as a self-sufficient country. Food prices are almost half of the EU average prices. The highest food expenditure in Turkey in 2001 was on fruit and vegetables – accounting for 23% of total food expenditure. Expenditure on fishery products was only 1 % and the meat and milk product shares were 13.55% and 12.84% respectively. Expenditure on beverages and tobacco was also low, indeed the lowest when compared with OECD countries.

Egypt

The recent data in Egypt indicate several favourable changes in food consumption patterns in Egypt. Average per capita consumption has increased for fruit, meat, edible oils and dairy products, for instance, whereas it has decreased slightly for vegetables and fish. Despite being lower than the international rates, this increase can be regarded as an indication of improvement in the Egyptian citizens' food quality, since these commodities are known for their ability to create energy and build the human body. Meanwhile, the per capita consumption of starches (grains and potatoes) has decreased despite the increase in the production of these crops. Per capita sugar consumption has only increased very slightly.

3. Foreign trade

Growth in foreign trade at constant values was subdued as the result of low demand in most countries. A slight increase was observed in the foodstuffs import-export ratio in Tunisia, Morocco, Spain, Portugal, Egypt, France and Lebanon. The import-export ratio decreased in the other countries.

Algeria

There was little increase in the value of agricultural commodity imports in Algeria in 2003 compared to 2002: only +3%. Imports increased steadily compared to the average for the 1994-2003 (+11.5%). Foodstuff imports proper only increased by 3.6% in 2003 compared to 2002 (+5.6% compared to the 1994-2003 average).

The structure of agricultural imports remains dominated by foodstuffs (73%). In food imports, cereals for human consumption remained predominant (25.2% of agricultural imports). The "Milk and milk products" group comes second in the list of foodstuffs (14.4%) and is followed by the "Other foodstuffs" group (11.2%) and the "Oils and fats" group (9.6%).

The non-food agricultural commodities, which accounted for 27% of agricultural imports, were as follows, in order of importance: wood and wood derivatives (8.5% of agricultural imports), with a considerable increase in value in 2003 compared to 2002 (+24%), and seed cereals and cereals for livestock feed (6.3%), with a sharp decrease in value in 2003 compared to 2002 (-36 %).

The highest increases in value were recorded for the following imports: the "Coffee, tea, spices" group (+25.9%); the "Other foodstuffs" group (+20.2%); the "Oils and fats" group (+19.3%), due to the sharp increase in the prices and quantities of imported soybean oil (+36.9% and +271% respectively); the "Fresh vegetables and dried beans" group (+7.3%) and the "Milk and milk products" group (+5.2%, where the price per tonne of powdered milk rose by 16.6% between 2002 and 2003).

Decreases were recorded in the values of certain imports: sugar and sugar products (-16.4%) due to an 8% drop in the unit price and a 7.5% decrease in the quantities imported; cereals for human consumption (-8.4%) due to the sharp decrease in the quantities of durum wheat imported (-16.4%); grain-mill products (-7.6%) due to the simultaneous decrease in the quantities and unit price of imported flour (-69% and -15.3% respectively).

Algeria continues to obtain most of its agricultural imports from the EU (44.8%), the North American Free Trade Agreement (NAFTA) countries (16.8%) and the countries of the Latin American Integration Association (LAIA) (17%). There was a relative decrease in imports from the EU and NAFTA countries in 2003 compared to the previous year, whereas imports from the LAIA increased further and those from CIS countries remained stable.

The main cereal suppliers were France (27%, essentially durum and common wheat) and the US (15% of cereals, essentially maize). France also dominated "Milk, eggs and honey" imports, accounting for over 32% of Algerian imports in value, followed by Argentina (11.4%), Poland (10.3%) and Belgium (8.5%). With regard to the "Oils and fats" group, Algerian imports were dominated by Russia, which accounted for 24% of these products, followed by Malaysia (17.2%) and France (9.6%).

Agricultural and food exports remained negligible although higher in value than in 2002 (+6%): barely 135 million US dollars covering 3.8% of agro-food imports (as against 2.3% in 2002 and 2.6% in 2001). Agro-foodstuffs only accounted for just over 38% of these exports, whereas the "Fertilisers, cork, hides and leathers" group accounted for 62%. The main agro-food exports were fresh and dried fruit (12.3% of these exports), fishery products (4.9%) and wines and beverages (4.5%).

The European Union and the Arab League continued to be the main destinations of the very limited volume of agro-food exports (70.3% and 14.6% respectively). Expressed in value, exports to the EU decreased by 2%, to NAFTA countries by 15%, and to the countries of the Arab League by 9%, whereas there was a sharp increase in exports to LAIA countries (+50% – although the absolute amounts were low) and to the countries of the Arab Maghreb Union (+42%).

Although Algeria's self-sufficiency rates improved slightly as the result of a good farm year, they were still low for pulses (25.6%), milk (41.2%), durum wheat (37.7% in 2003 compared to 21.1% in 2002) and common wheat (34.5% in 2003 and 18.4% in 2002).

The industrial tomato processing industry again rebelled against the policy pursued by the Ministry of Agriculture and Rural Development (MADR) and the Ministry of Trade, complaining that MADR policy was not encouraging the production of fresh tomatoes through the FNRDA (National Fund for the Regulation and Development of Agriculture) and arguing that the EU was paying producers a subsidy of €34.5 per tonne delivered to canning factories. And as for the policy pursued by the Ministry of Trade, they complained that it was not sufficiently protecting the domestic market: the authorities were too lax in issuing import licences for concentrated tomatoes, there was no import quality control, and the inputs for tomato production were "overtaxed" (Benouaret, 2003).

Tunisia

The evolution of the agro-food trade balance in Tunisia over the last decade has remained very dependent on variations in output level. The import-export ratio thus varied widely over that period. From 1992 to 2002 the ratio oscillated between a minimum of 46% in 1995, low performances of 45% and a maximum of 99% in 1999.

The agricultural import-export ratio registered in 2003 was 76%, slightly higher than the average calculated over the period under review (71%).

There has been little change in the composition of Tunisian trade in agricultural commodities and agri-foodstuffs over the last few decades. Imports have been largely dominated by cereals and sugar, and exports have been composed essentially of olive oil and fishery products. In view of the variations registered in domestic agricultural production, foreign trade in these products shows:

- a drop in cereal imports of 50% in the case of barley compared to the 2002 trade flows, 6% in the case of durum wheat and 4% in the case of common wheat;
- an increase in olive oil exports from 22 500 tonnes in 2002 to 60 000 tonnes in 2003;
- an increase in milk imports of almost 12% of the volume imported in 2002.

As regards the geographical distribution of Tunisian trade with the rest of the world, the European area continues to be the primary trading partner, accounting for 77% of total imports and 84% of agricultural exports.

Morocco

The agro-food trade balance in Morocco improved in 2003 with an import-export ratio of 100% compared to 91% the previous year.

It must be underlined that seafood product exports weighed extremely heavily in the agro-food trade balance, so that in order to evaluate that balance properly it is preferable to distinguish between the "balance" including seafood products and the "balance" without them. The balance "excluding seafood products" shows a considerable deficit, with an import-export ratio of barely 49.2%. The situation improved compared to the previous year (import-export ratio of 42.1%). This easing of the deficit position is actually due more to a marked decrease in imports than to any improvement in agro-food export performance.

Evaluation of the contribution of seafood products to overall trade also varies depending on whether or not they are included in agro-food trade. Exports exclusive of seafood products thus only accounted for 11% of Moroccan trade in 2003, whereas this proportion increased to 22.5% inclusive of seafood products. The share of agricultural imports in total imports decreased from 16.7% in 2002 to 13.8% in 2003 in view of the decrease in food expenditure already mentioned.

The structure of imports changed, due precisely to this drop in the cost of cereals supplies, cereal imports decreasing by 11 percentage points from 39% to 28%, whereas sugar and milk product imports only progressed by just under 1% and just over 1% respectively. Since very little oilseed is produced locally, this commodity scarcely benefited from the good results of the farm year, and the cost of oilseed imports rose. With regard to food dependence in respect of the 4 traditional groups of foodstuffs, the sharp decrease in wheat imports did not help to reduce their share in total imports to the extent one might have expected:

that share dropped from 62% in 1991-1994 to 56% in 2003. And lastly, raw wood now features as a non-food product which is gaining significance, accounting for 11% of imports.

In the export field, seafood products alone accounted for practically the same volume as "soil products"; exports exclusive of seafood products remained dominated by citrus, which represented 29%, followed by various vegetables (16%) and fresh tomatoes (13%), although there was a considerable decrease in the latter exports in terms of both volume (-21%) and value (-16%). The other fresh and frozen fruit plus dried fruit and edible nuts accounted for one-tenth of total exports. Canned fruit and vegetables, for which the trend was also negative (-12 to -13% in volume and value), accounted for 15% of the total. And lastly, the "other products" totalled 17% of all exports, covering a wide variety of foodstuffs (particularly potatoes, spices, fruit and vegetable juices, olive oil, etc.) and non-food products (paper pulp, plants, cork, hides, plant fibre, etc.).

Seafood product exports are based to a large extent on 2 groups of products: shellfish and molluscs on the one hand and canned fish on the other, accounting for 44% and 34% of total exports respectively.

Italy

The marked stagnation of international economies and the devaluation of the dollar against the euro adversely affected Italian foodstuff exports. In 2003, the value of agricultural and food product exports was €18.039 billion, i.e. a decrease of 2.2% compared to the previous year. These exports accounted for 7.2% of the value of total exports. The opposite trend was observed in the import field with an increase of 1.8%, which continued to aggravate the negative agro-food trade balance: the figure for 2003 was – €5.411 billion euros, i.e. -17.9% compared to 2002. This was due to the situation in the agricultural and food sectors in that both registered a larger deficit in the trade balance than was registered in 2002, (i.e. +9.9% for agricultural commodities and +29.8% for foodstuffs). It can thus be argued that the sector is conserving its traditional inflexibility with regard to the raw materials and semi-finished products on which the agro-food industry depends.

There was a downswing in all sectors of the agro-food balance in terms of both value and quantity. Closer observation of trends in domestic trade reveals that fresh fruit (where the balance, although less favourable than in 2002, was nevertheless positive) and live plants, which even registered growth, formed the spearhead of agricultural commodity exports. The balance was positive in the agri-foodstuffs sector, although decreasing slightly in terms of both value and quantity. The mainspring sectors of Italian exports included beverages, particularly wines, followed by confectionery and bakery products, processed vegetables, rice and grain-mill products. There was a marked negative balance in the meat, milk and milk derivatives groups, on the other hand, in terms of both value and quantity.

The balance was extremely negative for fresh seafood products and cereals. The trend in the tobacco trade was stable, on the other hand, with a deficit only in value, since exports exceeded imports in terms of quantity.

Italy's main clients marked time in 2003. Once again, Europe (particularly France) was Italy's closest market link for both agricultural commodities and foodstuffs in both the import and the export field, although exports dropped by around 3%. Exports to the United States also decreased, despite the apparent recovery on the US market. Although the figures for trade with third countries were quite satisfactory, this trade is more residual in nature. Approximately 65% of Italian agri-foodstuff exports went to the European market. Imports from the EU showed a slight upward trend and accounted for almost 75% of total agro-food imports.

Portugal

Portugal's negative trade balance in the production of staple foodstuffs remained, with very few exceptions. Food self-sufficiency was achieved only for fresh fruit and vegetables, butter and poultry. The cases of cereals and sugar clearly illustrate the unsuitability of weather conditions in particular and the inability of production structures to increase the output of these commodities, which are furthermore subject to quotas limiting production and preventing the expansion of acreage under cereals or sugar beet.

So it is hardly surprising that the food balance was extremely negative (- €2 778 800 000 in 2002, i.e. 44.4% of domestic agricultural production). The import-export ratio was around 24.6%, higher than the previous year.

In short, in view of exports – some €909 200 000 in 2002 – Portugal only produces 70% of the foodstuffs it consumes. This is a chronic situation which has been going on for a long time and which has many different causes that are difficult to eliminate (weakness of agrarian structures, production quotas, etc.).

With regard to the geographical distribution of Portuguese trade with the rest of the world, the European area continues to be the primary trading partner in terms of both imports and exports, accounting for 90% of agricultural trade.

France

In France, trade in agricultural commodities and agri-foodstuffs continued at the same level as in 2002, whereas it had progressed steadily in previous years. Exports remained constant, with a fairly marked upward trend in the first quarter compared to the same period the previous year; they then suffered the effects of the drop in production from the summer onwards. There was a very slight downswing in imports, so that, all in all, the balance grew very slightly to €10.1 billion compared to €9.9 billion in 2002. Once again, the agricultural and agro-food sector's share in the country's trade is much greater than its contribution to production as a whole: it is the most positive item in the trade balance. We would point out that this very positive contribution to the balance of payments is a relatively recent phenomenon: this balance has only really been permanently positive since 1980, and trade in agri-foodstuffs now accounts for the bulk of it (6.3 billion out of 8.6 billion). This is also a fairly recent phenomenon, since it is only in the last 20 years that agri-foodstuff exports have also "overtaken" bulk commodities.

It is always the same products which contribute to this positive balance, beverages, wines and spirits, and cereals accounting for the major share. Paradoxically, there was a marked growth in cereal exports this year (+ €240 million), and the positive balance grew by €277 million. This figure is of course to be explained mainly by the good results achieved in the first 6 months (strong demand and stocks from 2002), but it must be noted that the early harvest and crop quality in 2003 also meant that products could be exported at high prices.

The situation in the beverages sector was more mixed, exports remaining at the same level with the same balance as the figure recorded in 2002. Wine constituted the bulk of these exports (5.8 billion); although the volume and value of champagne continued to grow (+5.5%), the downward trend in the export of other wines of registered designation of origin, which began in 1999, continued. Another sector which traditionally shows a large surplus, the sugar and sugar product sector, also registered a sharp decline this year (-7% in value).

A deficit was registered for fish, shellfish and fish products, tobacco, fruit and tropical products, as was the case the previous year. There was a sharp increase in tobacco imports in the 1990s, essentially due to the decrease in domestic production (acreage under crop has decreased by almost 60% since 1980). Imports decreased for the first time in 2003, as did consumption, and the trade balance dropped from € -1.54 billion to € -1.44 billion. We would also draw attention to the increase in fruit imports, mainly citrus and tropical fruit. There was a sharp increase in the negative balance this year, which was essentially the result of the sharp drop in output.

As was the case in previous years, France trades its agri-foodstuffs mainly with the European Union, which accounted for 72% of exports and 70% of imports. The variations in Euro parity thus played a minor role as far as the explanation of these flows is concerned.

The main clients and suppliers remain the same from one year to the next, the 6 leading clients and 6 leading suppliers all being in the EU. We would point out that the role played by Brazil, which has gained considerable significance in imports in the last few years, did not progress further and that, despite the decrease in dollar parity, with the various trade disputes and political conflicts with the United States the latter is still far from being the leading non-EU client, imports remaining at the same level as that recorded in previous years.

The EU enlargement in May 2004, in preparation for which the customs duties on agricultural commodities had been virtually totally abolished by 2003, had little effect on France's agro-food trade. The 10 accession countries actually only accounted for a very small share of that trade: exports amounted to €459 million, 153 million of which went to Poland, and imports amounted to €223 million, 102 million of which came from Hungary, i.e. 1% of total EU imports. It must be pointed out that France accounts for only 3% of the agro-food trade of the EU-15 with these countries.

Spain

Contrary to the general merchandise trade balance, the agro-food trade balance for Spain has shown an export-import ratio of over 100% in recent years. Indeed, whereas the general import/export ratio for 2003 has been around 75%, the agro-food export/import ratio has been 105%.

Both imports and exports in the agro-food sector increased this year, imports growing by 2.6%, and exports by 3.9%. A further remarkable aspect is the relatively high proportion of agro-food exports, which accounted for 17.6% of total merchandise exports in 2003, whereas agricultural commodity imports accounted for 12.5% of expenditure.

More detailed analysis of exports reveals several factors. First, the two main categories of exports in terms of economic importance are fresh fruit and vegetables. Next in rank are prepared fruit and vegetables, beverages, and oils and fats, and fish and meat products also figure in the list. Of these products, only oils and fats exports decreased in value in 2003, while the exports of the other commodities grew in 2003 at a higher rate than the general agro-food index. Thus, with that one exception, it can be concluded that the main exporting sectors are competitive on the destination markets, which are mainly the EU and other European countries. The sectors with the poorest exporting performance in 2003 were wool, leather and live animals.

With regard to imports, the main chapter is fishery products, accounting for nearly 18% of import expenditure. Timber, beverages, tobacco, fruits, oilseeds and cereals are also of special relevance; of these major commodities, cereals were the only one where the value of imports decreased. The value of fruit, tobacco and beverages imports increased significantly, on the other hand, at a rate above average.

A further point to bear in mind is the different pattern that can be observed in trade in raw materials on the one hand and food products on the other. While the export/import ratio for food was 120%, the ratio for raw materials – timber, leather, cork, wool, fibres etc. – was only 60%. Spain has a shortage of those materials and they have to be imported. The expenses to be borne are financed by the surplus in net food exports.

And there is another difference depending on the origin of the commodities traded. Forestry products accounted for 11.4% of imports and only 6.14% of exports. A similar situation can be highlighted for fishery products: as mentioned, their weight in imports was quite relevant (17.6%) contrary to their share in exports (6.59%). Trade was more balanced in the case of animal products: 16.2% of imports and 15.7% of exports; and, unlike the latter products, the balance for plant products was clearly biased towards exports. The export/import ratio for plant products was approximately 150%, despite the major deficit in net exports of certain staple commodities such as milk, cereals and oilseeds. In fact the significant surpluses achieved in trade in fruit and vegetables offset all the previous deficits.

During the last farm year, the association of fruit and vegetable producers and exporters of (FEPEX) expressed its concern regarding the acceleration in the import of fruit mentioned above. It stated that, as the EU market opens up following the bilateral agreements signed by the EU with Mediterranean partners and other countries, Spanish productions still face certain non-tariff barriers when entering high-income countries such as Japan and the United States.

Turkey

In Turkey, agro-food exports and imports increased from 2002 to 2003 by 30% and 32% respectively. However, imports increased faster for the same products. The export-import ratio for the agro-food trade remained around 100%. Turkey is a net exporter of food products and a net importer of non-food agricultural commodities. Agro-food products have a higher and increasing share in exports. Bulk non-food commodity imports dominate agricultural imports. This latter component of imports is also related to non-agricultural exports. The imported raw materials are not necessarily for domestic consumption; this is especially the case with the largest import category, textile fibres, which are for textile exports.

Trade relations between Turkey and the EU are based on a system of preferential access, in which schedules and tariff reductions for the various products are defined (in Council Regulation EC 1506/98). Turkey effects almost two-thirds of her exports under preferential conditions. Tariff-rate quotas apply to apricot pulp and hazelnuts, and voluntary export restraint agreements apply to tomato paste and peeled tomatoes. Minimum import (entry) prices for 11 fruits, 4 vegetables, grape juice and grape must are further

restrictions imposed by the EU. There are seasonal restrictions for preferential tariffs for 4 fruits and 7 vegetables. The quotas set for tomato paste, watermelons and onions are 30 000, 14 000 and 2 000 tonnes respectively. High specific duties prevail for almost all 'core' products such as cereals, sugar, dairy products, meat, olive oil, etc.

The EU is a primary partner in the context of Turkey's foreign trade, accounting for 47% of exports and 21% of imports. Turkish agriculture has only been protected recently by "relatively high" tariffs. In other words, the "market access" area still provides the widest scope for further liberalisation, and here the tariffs are decreasing in accordance with the commitments signed in agreements. What is more, even high tariffs provide only limited protection. The decline in world prices, coupled with high domestic prices reduces the effects of the protection that tariffs bring. The beef and sugar industries are already suffering from this problem.

Egypt

There have been favourable developments in Egypt's foreign trade in commodities over the last 3 years. The value of exports has increased, whereas the value of imports has decreased throughout the years under review. This has brought a steady reduction of the chronic deficit in the Egyptian trade balance, since in 2002/2003 it amounted to only 57% of the 1999/2000 value. There have also been numerous positive developments with regard to the values of agricultural imports and exports, the value of exports increasing from around \$300 million in 1999/2000 to around \$538 million. In addition, the value of imports decreased during the same period, although only very slightly. This resulted in a constant reduction of the deficit in the agricultural trade balance during the same period, but at a slower rate than that of the total trade balance. The share of the agricultural deficit in the overall trade deficit thus increased from 11.4% to 15.5% over the last 3 years.

These positive trends can be explained by the following factors:

- the active export policy pursued by the government in recent years, especially in the field of agricultural exports, as mentioned above;
- the constant decrease in the exchange rate of the Egyptian pound during that period, which led to the increase in the prices of many unimportant imports, with the result that imports ceased.

As for the geographical distribution of the Egyptian commodity trade, the European markets account for the major portion of Egyptian exports, followed by the Asian markets. On the other hand, the share of exports going to Arab countries is decreasing (despite the constant efforts to expand trade with Arab countries). And finally, the American market's share remains limited.

It is also noted that although recent years have witnessed the achievement of the Euro-Egyptian Partnership Agreement, the share of the European countries in Egyptian exports rose slightly from 34.3% to 34.9% and then decreased to 30% in the last 3 years. On the other hand, the share of the other countries (mostly Asian and African countries) increased from 33.6% to 40.1% then to 46% during the same period.

It should also be pointed out at this point that there was a sharp decline in Egyptian orange and onion exports to the Arab countries and a sharp increase in the exports of these 2 commodities to Asian and African markets during the period under review.

As regards imports, it is observed that the American markets account for the major portion of Egyptian imports, which have been increasing from year to year until they reached around 73.3% of total Egyptian imports last year. The Asian and African countries come second, followed by a number of European countries with decreasing percentages. The Arab countries come last with a very modest percentage despite all that has been said about the numerous agreements with European and Arab countries to increase the volume of commodity exchange with Egypt.

What is very remarkable in the development of Egyptian commodity imports is the huge leap in imports from the US of most agricultural commodities during the period under review, especially sugar and meat products, which were conventionally imported from Asian markets and mostly from the European markets. Then there was this conversion to the American markets, which have now become the main source for these 2 commodities with a percentage of 78% and 99% respectively last year; this was a leap from a share which had not exceeded 1% in the 2 previous years.

Liban

Agro-food exports in Lebanon amounted in 2003 to US \$ 235 million as against US \$ 175 million in the previous year. The share of food and agricultural products in total exports was 15.48% in 2003, against 16.7% in 2002. The largest export components in this category were prepared foodstuffs, beverages and tobacco (63.8%), followed by plant products (27.66%).

The Gulf countries are the main destination for Lebanese agro-food exports (60%), followed by Syria (21%), Jordan (10%), the EU (2%) and Egypt (2%). The geographic distribution of these exports shows that Lebanon's main clients are Saudi Arabia, the United Arab Emirates, and Kuwait. In fact, most of the vegetable and fruit industry products are exported to Saudi Arabia (16%), the US and the UK.

The value of agro-food imports, on the other hand, amounted to US\$ 1331.6 million in 2003 compared to US\$ 1237 million in 2002. The main exporting countries are Brazil, Egypt, Iran, the Netherlands, and the US. Cereals are imported from the US (41% of total cereal imports), Australia (11%) and Germany (8%).

Most live animals and animal products are imported from France, Germany and Turkey. Lebanon is self-sufficient in poultry products. The wine industry has achieved notable success and accounted for US\$ 8 million worth of exports to Europe, America and Australia.

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