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# Organic farming in the Mediterranean : towards further development

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## Introduction

The Mediterranean Agronomic Institute of Bari (CIHEAM-IAMB) has initiated since 1999 data collection on the organic sector in the Mediterranean area.

Since 2005 a separate chapter in « The World of Organic Agriculture » has been dedicated to the Mediterranean area, and IAMB has committed itself to supporting the global organic survey in this region.

In this study case, the Mediterranean region includes the Mediterranean countries of the European Union (Cyprus, France, Greece, Italy, Malta, Portugal, Slovenia and Spain), the Eastern Mediterranean countries (Albania, Bosnia and Herzegovina<sup>1</sup>, Croatia, Macedonia, Montenegro and Serbia), the Middle East or Mashrek (Egypt, Jordan, Israel, Lebanon, Palestine, Syria and Turkey) and North Africa or Maghreb (Algeria, Libya, Morocco and Tunisia).

## 1. Historical development of organic agriculture

Organic agriculture is not a novelty in the Mediterranean; on the contrary, in many countries, organic agriculture was introduced 30 to 40 years ago – at first in the EU Mediterranean countries by pioneer organizations and associations, and slightly later in some countries of the Eastern and Southern shores (Israel, Egypt, Morocco, Tunisia and Turkey). The main drivers were foreign private companies looking for new investment opportunities stimulated by the growing market for organic food in Europe.

However, the insufficiency or entire absence of policies supporting the organic sector have slowed down its development in the Mediterranean area. Earnest development of the organic movement has begun over the course of the last decade, and today organic farming is present in most Mediterranean countries (Al Bitar, 2004). Table 1 illustrates some important steps in the evolution of the organic sector in the Mediterranean Region.

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<sup>1</sup> Including the Federation of Bosnia and Herzegovina and Srpska Republic

Table 1  
**Milestones in the history of organic agriculture in the Mediterranean**

1960s-1970s	Organizations and associations promoting organic farming in EU Mediterranean countries proliferate.
1977	Organic farming in Egypt begins; the Sekem foundation leads the way, applying German experiences.
1980s	After ten years of unsuccessful attempts, organic farmers in Israel found the Israeli Bio Organic Association (IBOAA), setting the stage for the development of the sector in Israel.
1984-1985	A consequence of the growing market for organic products in Europe, development of organic sector in Turkey flourishes.
1980s	Organic agriculture begins to thrive in Tunisia, through private initiatives.
1986	Beginning of the organic movement in Morocco, initiated by citrus growers with French support.
End 1980s 1990	Croatian and Serbian endeavors in organic agriculture are instigated.
1990	The Mediterranean group on organic agriculture - AgriBioMediterraneo - is established; it becomes the IFOAM Mediterranean group in 1997. The Egyptian Bio-dynamic Association (EBDA) is founded, giving birth to the Centre of Organic Agriculture in Egypt COAE, a local certification body.
1990s	The move towards organic agriculture is set in motion in Lebanon as a reaction on the excessive use of chemicals.
1992	ETO, the Turkish association for organic agriculture, is born.
1994	Turkey establishes its own regulation.
1997	The Organic Agriculture Association (OAA) is founded in Albania.
1999	In Tunisia, a national regulation is issued, and the Technical Centre for Organic Agriculture (CTAB) is created. In the same year, IAMB launches the Mediterranean Organic Agriculture Network (MOAN).
2000	The organic movement in Algeria begins and an organic farming unit in Malta at the Ministry of Agriculture is established.
2001	An organic farming society in Jordan in the Ministry of Agriculture and the Ministerial organic unit in Tunisia are founded. In the same year, the first symposium on organic agriculture in the Mediterranean takes place in Morocco. Croatia and Macedonia adopt national regulations.
2002	Algeria establishes a national unit for control and certification in the Ministry of Agriculture.
2003	The organic committee in the Syrian Ministry of Agriculture is founded. In the same year, the first Arab Conference on Organic Agriculture takes place in Tunisia, followed by various other initiatives in the region, underscoring the great expansion of the sector. The Middle East Natural & Organic Products Expo is inaugurated in Dubai.
2004	An organic action plan is elaborated in Tunisia.
2005	The Association of Lebanese Organic Agriculture (ALOA) is founded.
2006	Libancert, a Lebanese Certification Body, is launched.
2007	Macedonia prepares its national action plan.

## 2. Statistical development and networking

Despite the substantial developments experienced by the sector over the last several years, access to reliable statistical data and information about the state of the art and scope of organic agriculture, particularly in the Mediterranean Basin, remains a challenge. In response to the growing need to monitor growth trends in the sector, IAMB launched the Mediterranean Organic Agriculture Network (MOAN) in 1999. Its primary objective is gathering detailed data on organic agriculture in the CIHEAM-member states (Albania, Algeria, Egypt, Greece, Italy, Lebanon, Malta, Morocco, Portugal, Spain, Tunisia and Turkey).

In 2006, in view of strengthening the Euro-Mediterranean partnership, and in consideration of the institutionalization of the organic sector by governments, especially in the non-EU states, MOAN was reorganized and now includes 24 Euro-Mediterranean countries (table 2). The Ministries of Agriculture of each member country actively participate, with representative of the units in charge of organic agriculture. The aim of MOAN is to promote the organic sector in both the EU and non-EU Mediterranean countries and to assign an important role in representing and promoting, on the international arena, the identity and specificities of Mediterranean organic agriculture.

Table 2  
**The member countries of the Mediterranean Organic Agriculture Network (MOAN)**

European countries	Eastern Adriatic countries	Eastern and Southern Mediterranean countries
Cyprus*	Albania	Algeria
France	Bosnia& Herzegovina	Egypt
Greece*	Federation of Bosnia and Herzegovina	Jordan
Italy	Srpska Republic	Lebanon
Malta	Croatia	Libya
Portugal*	Macedonia	Morocco
Spain	Montenegro	Palestine
Slovenia	Serbia	Syria
		Tunisia
		Turkey

\* Countries that have not yet officially joined.

In order to achieve these goals, reliable and detailed information about the sector, its strengths and weaknesses, as well as an objective assessment of organic agriculture's multifaceted potential and its impacts on Mediterranean farming systems and rural communities is quintessential.

Therefore, data collection, analysis, dissemination, and impact evaluation represent key activities of MOAN.

The second MOAN meeting held in June 2007 in Izmir, Turkey, focused on the « Methodological issues in data collection on organic agriculture in the Mediterranean. » Nineteen countries participated, and on behalf of their ministries representatives committed to carry out the following activities:

- Review the current state-of-the-art of organic data collection and reporting in MOAN countries;
- Exchange best practices in organic data collection, analysis and dissemination;
- Identify common problems and challenges related to organic data collection and reporting;
- Launch a long-term program of activities and initiatives for the development of a shared framework for the collection and reporting of reliable data on the Mediterranean organic sector.

Efforts are underway to prepare a joint plan of action, which will be further discussed at the next MOAN meeting to be held in Syria in March 2008.

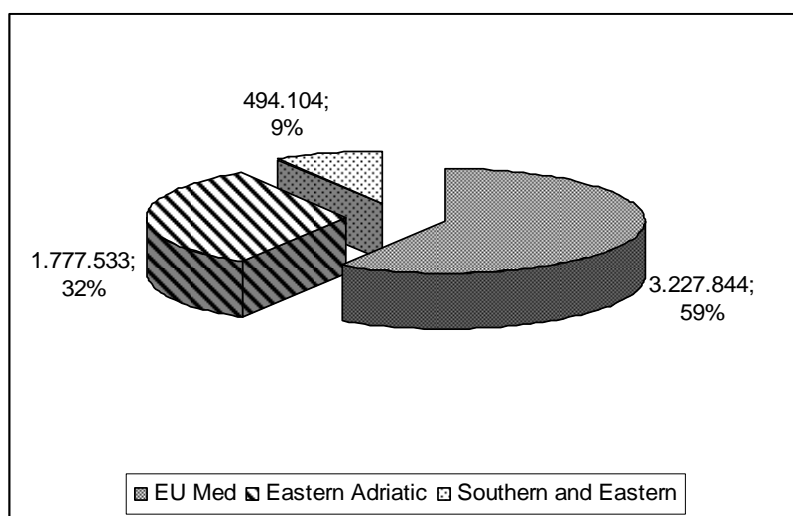
### 3. Structural aspects

Currently, in the Mediterranean region (25 countries) there are more than 5 million hectares of organic land and almost 140'000 farms (table 3).

Organic agriculture is now practiced in all Mediterranean countries without exception, and the sector is becoming and increasingly important market segment in all parts of the Mediterranean albeit substantial differences in levels of development persist.

In general, EU Mediterranean countries have access to far greater resources and are much further developed than the Southern and the Eastern countries, as a result of their geopolitical, economic, social and legal integration. Indeed, 59 % of the total Mediterranean organic land area is located here (figure 1), the leading countries being Italy and Spain.

Figure 1<sup>L</sup>  
**Distribution of organic land in the Mediterranean 2006 (hectares, including wild collection)**



Source: MOAN Survey 2007

Table 3  
**Organic farming in the Mediterranean: Land area and number of operators**

Region	Subgroup	Country	Certified agricultural area (ha)	Total certified area (ha) <sup>2</sup>	Farms/ Operators	
North	Europe	Cyprus	1'979	1'979	305	
		France	552'824	552'824	17'477	
		Greece	302'264	302'264	24'666	
		Italy	1'148'162	1'148'162	51'411	
		Malta	20	20	11	
		Portugal	269'374	269'374	1'660	
		Slovenia	26'831	26'831	1'992	
		Spain	926'390	926'390	18'318	
	sub total		3'227'844	3'227'565	115'840	
	Eastern adriatic	Albania	171	1'201	93	
		Bosnia Herzegovina	714	488'804	60	
		Croatia	6'012	23'670	342	
		Macedonia	509	2'101	104	
		Montenegro	25'051	158'851	15	
		Serbia	906	1'102'906	48	
		sub total		33'363	1'777'534	662
	East	Mashrek	Turkey	100'275	192'789	14'737
Egypt			13'995	13'995	500	
Israel			6'685	6'685	420	
Jordan			1'024	1'024	25	
Lebanon				2'500	330	
Palestine			641	641	303	
Syria			30'493	30'493	3'256	
South	Maghreb	Algeria	1'550	2'400	61	
		Libya	n.a.	n.a.	n.a.	
		Morocco	4'216	104'216	n.a.	
		Tunisia	154'793	220'476	515	
		Subtotal	313'672	575'219	20'115	
		Total		3'574'880	5'580'318	136'617

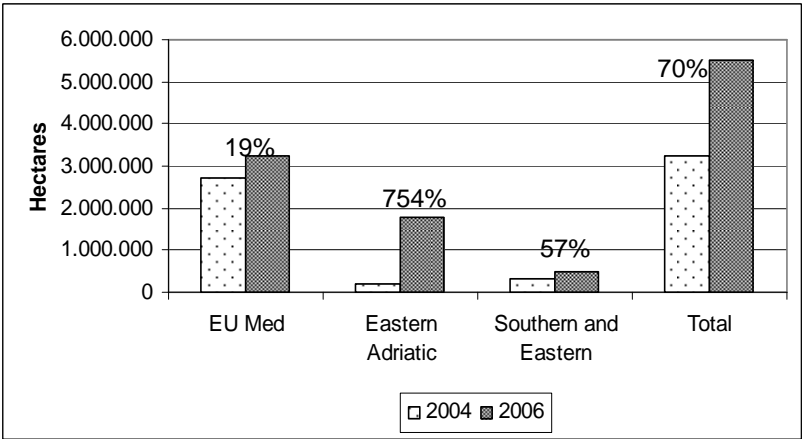
Source: MOAN Survey 20073

<sup>2</sup> Including wild collection

<sup>3</sup> Editors' comment: Please note: In most cases, the data provided by the MOAN network include wild collection areas, which are not included in the tables of the global organic survey carried out by FiBL and IFOAM Furthermore, in some cases, the data provided by the members of the MOAN network differ from those that were provided for the global organic survey by FiBL, IFOAM and SOEL. IAMB Bari and FiBL will strive for more data consistency in the future.

A comparison of year-end data for 2004 and 2006, however, indicate particularly strong growth in countries outside the EU such as the Eastern Adriatic countries and in countries on the Southern and Eastern shores of the Mediterranean. Among Eastern Adriatic countries, Bosnia and Herzegovina and Serbia demonstrated the largest growth and Turkey, Tunisia and Syria confirmed exceptional increases of more than 60 %. Growth in EU countries has leveled off but remains strong, bolstered by a major increase in Spain and Portugal (see figure 2). In total, organic land area increased by 2.25 million hectares, representing 70 % more than in the year 2004.

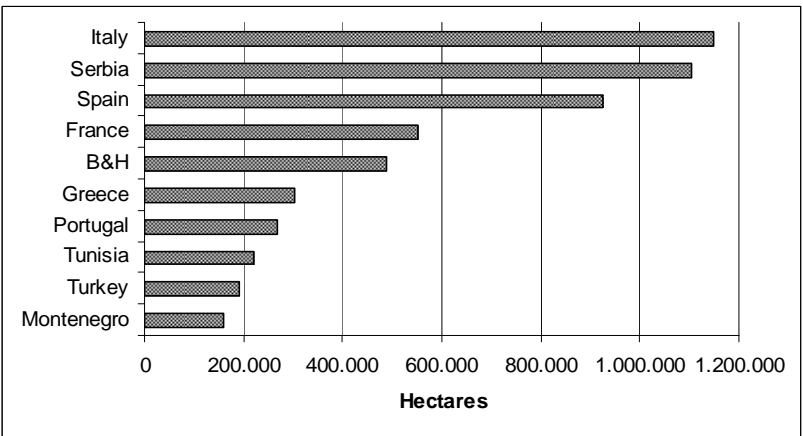
Figure 2  
**Increase of organic land area in the Mediterranean**



Source: MOAN Surveys 2005 and 2007

As in previous years, Italy leads the top ten countries with most organic land. With an increase of 900'000 hectares, most of which is constituted by pasture and wild collection areas, Serbia has moved up the second position, followed by Spain, France and B&H (figure 3).

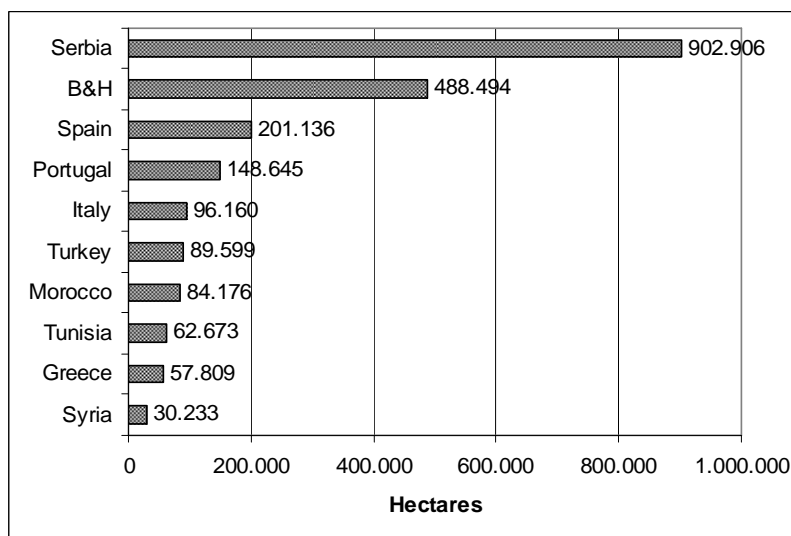
Figure 3  
**The ten countries with the largest organic areas (including wild collection)**



Data as of Dec. 31, 2006  
 Source: MOAN Survey 2007

Examining the ten countries with the highest increase of organic land area (figure 4), Serbia ranks number one, followed by B&H, Spain, Portugal and Italy. Notably, six of the countries with the highest increase are non-EU countries, bringing the share of the non-EU countries to more than a third of the total Mediterranean organic area (as 2006, figure 1). Compared to the previous year, this share expanded largely, from 25 to 41 % (Al Bitar, 2007), signifying sector maturation. The increase is due to diverse factors, including increase of awareness by consumers, expansion of market opportunities and government support. The high increase of organic land in the area is also due to growth of the certified organic land in Serbia, B&H and Montenegro mainly wild collection, which must be viewed in a cautionary manner.

Figure 4  
**Top ten countries with highest increase of organic land area (hectares) in the Mediterranean**



Source: MOAN Survey 2007

#### 4. Legal and Policy framework

The legal framework has also evolved in the last years, but although differences between the individual countries remain.

As shown in table 4, out of 25 Mediterranean countries, 17 have instituted national regulatory frameworks. Apart from the EU countries where the EU regulation 2092/91 is applied, all Eastern Adriatic countries - except the Federation of Bosnia and Herzegovina, where the regulation is still in draft form - have developed a national regulation. Among Southern and Eastern Mediterranean countries, only Israel, Tunisia and Turkey have developed their own regulations. Five other countries have regulation in draft form (Algeria, Lebanon, Egypt, Morocco and Syria) and only three entirely lack a regulatory framework.

Although certification in non-EU Mediterranean countries was performed primarily by foreign organizations until recently, nine countries now have local certification bodies, including Albania, Egypt, Lebanon, Turkey and the Eastern Adriatic countries.

Policies supporting the organic sector are still lacking in many Southern and Eastern countries. Only Tunisia, Turkey and Algeria subsidize organic farmers directly through financial aids, while all Eastern Adriatic countries have already instituted support strategies.

Table 4  
**Institutional framework of organic agriculture in the Mediterranean**

Shore	Country group	Country	National legislation	Support Policies		Certification Bodies	Producers' Associations	Market	
				Subsidy	Action Plan			Export	Local
North	Med-EU	Cyprus	•	•	draft	1 foreign; 1 local	2	null	Fair
		France	•	•	•	1 foreign; 5 local	78	developed	Developed
		Greece	•	•		7 local	n.a.	growing	Developed
		Italy	•	•	•	5 foreign 16 local	6	developed	Developed
		Malta	•	•		1 local		limited	Limited
		Portugal	•	•		2 foreign; 4 local	n.a.	n.a.	n.a.
		Slovenia	•	•	•	1 foreign; 1 local	10	null	Growing
		Spain	•	•	•	2 foreign; 25 local	36	developed	Growing
	Eastern Med.	Albania	•		•	2 foreign; 1 local	3	limited	Limited
		Bosnia & Herzegovina	Rep. Srpska; (BiH draft)	•		4 foreign; 1 local	n.a.	limited	Null
		Croatia	•	•		7 local	30 associations; 15 coop.	Limited/ null	growing
		Macedonia	•	•	•	3 foreign 1 local	6	null	null
		Montenegro	•	•		5 foreign; 1 local	3	limited	null
Serbia		•	•		6 foreign; 2 local	4	growing	null	
South and East		Turkey	•	•	draft	7 foreign; 3 local	5	developed	developed
	Mashrek	Egypt	draft			3 foreign; 2 local	8	developed	growing
		Jordan				1 foreign		limited	null
		Lebanon	draft			1 local; 1 foreign with local office	2	limited	growing
		Israel	•	•	n.a.	3 local	2	developed	developed
		Palestine				1 foreign	n.a.	limited	null
		Syria	draft			no	no	limited	null
	Maghreb	Algeria	draft	•		2 foreign	2	limited	null
		Libya							
		Morocco	draft			2 foreign	1	developed	null
Tunisia		•	•	•	4 foreign	9	developed	limited	

Organic products are increasingly traded internationally. The market share is still modest, but trends indicate that there is an enormous potential for expansion. Other than in Europe, the development of organic farming in the Mediterranean took place almost solely for market reasons, stimulated by the high demand of foreign markets. The market differs markedly from country to country, but, generally, organic food is primarily oriented towards export. Most of the produce (table 5) is destined to foreign markets such as the EU, USA, Japan and the Gulf area. The main exports are products that either cannot be grown or have limited availability in those countries, such as spices, medicinal plants, olive oil, tropical fruits, vegetables and citrus.

Domestic markets are indeed growing, though at a indisputably sluggish pace (table 4). In reality awareness and consciousness of the benefits of organic agriculture are on the rise, and the number of supermarkets, open markets and specialized shops is increasing.

Table 5  
**Main production of the non EU Mediterranean countries grouped by geographic clusters**

Cluster	Country	Main organic products
Eastern Adriatic	Albania Bosnia & Herzegovina Croatia Macedonia Montenegro Serbia	Cereals Medicinal herbs, aromatic plants Fresh vegetables Green fodder Fruits and berries Grapes Bee pastures Wild collection products Olives (Albania and Croatia)
Mashrek	Egypt Jordan Lebanon Palestine Syria Turkey	Cereals Fresh vegetables Medicinal herbs, aromatic plants Fruits Grapes Citrus Olives and olive oil
	Jordan	Date palm
	Lebanon	Wild collection products Animal products (eggs, goat milk, dairy products) Essential oils Dried fruits Processed products
	Syria	Cotton
Maghreb	Algeria Libya Morocco Tunisia	Dried pulses Root crops Cotton Oilseeds Green fodder Pastures and meadows Wild collection products Dried fruits Animal products (Bovine, Ovine, Poultry, Bees) Processed products
Maghreb	Algeria Libya Morocco Tunisia	Cereals Fresh vegetables Medicinal herbs, aromatic plants Green fodder Fruits Date palm Citrus Olives Grassland Wild collection products Argan (only in Morocco)

## 5. Outlook

Despite progressive developments and access to seemingly insatiable major international markets, the evolution of the organic sector in the Mediterranean region is constrained in a number of critical ways.

Monitoring the sector's growth with the region is a complex task, due to the heterogeneity and unreliability of data and the difficulty in obtaining detailed statistical information about foreign trade, consumption and processing. In order to overcome these deficiencies, public institutions need to take responsibility for the collection and dissemination of this information, ensuring linkages between all parties engaged in the production, processing and trade of organic products.

The slow development of local markets, especially those in the Eastern and Southern Mediterranean countries, represents a significant constraint to growth and an obstacle to the long term sustainability of the sector. Many of these local markets remain small and insufficiently organized to take advantage of the growing consumer awareness and demand. Many farmers lack information and support, and in export oriented markets, the traders play the biggest role. Moreover, due to the absence of expertise and infrastructure for the distribution and processing of organic products, raw goods are traded and exported by foreign companies, who in turn process and label the products for sale outside these countries. It is not unusual to see, for example, that raw goods are exported to European countries, only to be imported back into major cities as processed products into originating countries, thus blocking further development of processed products there and taking market share and the economic benefits from local producers.

A key goal and strategy for Mediterranean countries should be to build internationally competitive agriculture and industrial production systems, creating high quality value-added products on the market that would be both competitive with and complementary to the European brands.

In addition, many countries in the Mediterranean region content with a lack of technical and scientific knowledge about the application of organic production methods, which includes techniques developed for areas characterized by widely varying soil, climatic and cultural conditions. Most of all, the pervasive concepts of « commercial-organic » or organic agriculture as input substitution in the Mediterranean should be supplanted by the notion that organic agriculture is a process-based system that aims to achieve ecological, social and economic sustainability.

Organic agriculture represents a significant opportunity for farmers to diversify their production and increase income, to generating new job opportunities, to create additional value for local production, to empower women and to provide an engine for rural economic development and recovery, especially in less privileged and marginalized areas.

Finally, institutional capacity needs to be strengthened; insufficient training and expertise, lack of research and experimentation, absence of support policies and measures to further promote the organic sector constitute major weaknesses in Mediterranean countries. Public institutions should establish programs to support and enhance production and national consumption of organic products. Supportive policies need to be developed, and efforts need to be made to establish equivalency and mutual recognition of regulations across the region and internationally.

In conclusion, organic farming represents an important opportunity for the economic development of the Mediterranean that will support vibrant rural economies. The primary task is to embed the sector's development in local culture, linking it not only to production, but also to support for local markets, social networks and environmental and health related benefits.

As envisioned by the Barcelona Declaration of the 28<sup>th</sup> November 1995, the establishment of the « free trade » zone between the EU and the Partner countries by the year 2010 may represent the starting point for a Euro-Mediterranean shared prosperity, which may translate into an important process of evolution of the organic sector (Pierleoni and Al Bitar, 2007).

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Founded in 1962 on the joint initiative of the OECD and the Council of Europe, the International Centre for Advanced Mediterranean Agronomic Studies (CIHEAM) is an intergovernmental organisation comprising thirteen member countries from the Mediterranean Basin (Albania, Algeria, Egypt, Spain, France, Greece, Italy, Lebanon, Malta, Morocco, Portugal, Tunisia and Turkey).

CIHEAM is made up of a General Secretariat based in Paris and four Mediterranean Agronomic Institutes (MAI) located in Bari (Italy), Chania (Greece), Montpellier (France) and Zaragoza (Spain).

In pursuing its three central missions (education, research and cooperation) CIHEAM has come to be recognised as an authority in its fields of activity: Mediterranean agriculture, food and sustainable rural development.

### **CIHEAM Observatory**

The CIHEAM Observatory is an instrument for analysis and discussion of Mediterranean agriculture, rural affairs and food.

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