



The Future of Agriculture and Food in the Mediterranean countries

A Report for discussion and decision-making





CIHEAM



The International Centre for Advanced Mediterranean Agronomic Studies (CIHEAM)
was founded in 1962.

It's an **intergovernmental organisation** comprising **thirteen member countries**
from the Mediterranean Basin

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.

A Mediterranean Will





A Mediterranean Report

- Published since 1999, the Annual Report of CIHEAM was officialy renamed **Mediterra** in 2007.
- **CIHEAM's new annual report provides a prospective study** of the situation likely to be facing Mediterranean agriculture, food and rural affairs in 2020.
- **A multi-disciplinary approach** reflecting the many dimensions of agriculture in the Mediterranean area
- **Mediterra 2008** is the fruit of **collective effort** involving both experts from CIHEAM and a panel of international experts
- A veritable **Information Tool and basis for decision-making**
- **Publication in 5 languages (English, Arabic, Spanish, French and Italian)**



Plan of the Report

1. **Analysis** of Agriculture and Agro-Food situation
2. **Action priorities** for the Mediterranean
3. **Global** scenarios for Mediterranean Agriculture
4. **Proposals** for action



Analysis based on the dynamics of the Mediterranean situation

- ❖ **The socio-demographic context**
- ❖ **The geo-economic context**
- ❖ **Natural resources**
- ❖ **Science, technology and innovation**
- ❖ **Dietary patterns and trends in consumption**
- ❖ **Governance in the rural and agricultural worlds**



The demographic growth



Chart 1 - The population of the Mediterranean, 1990-2020

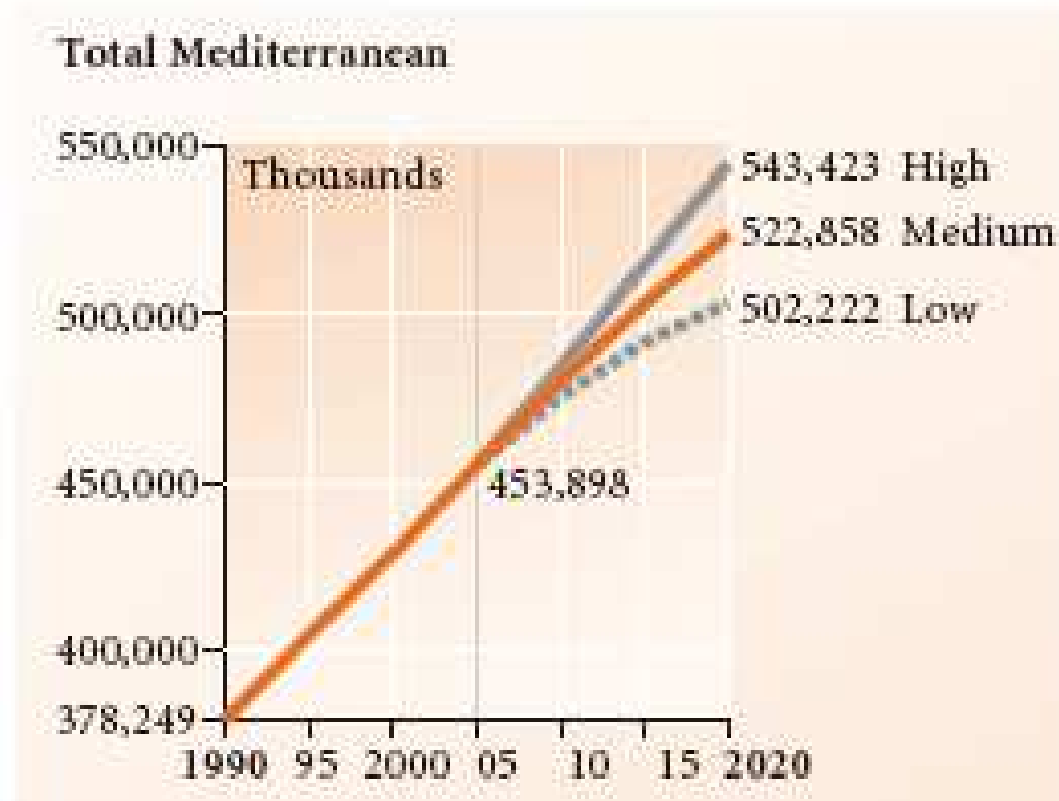
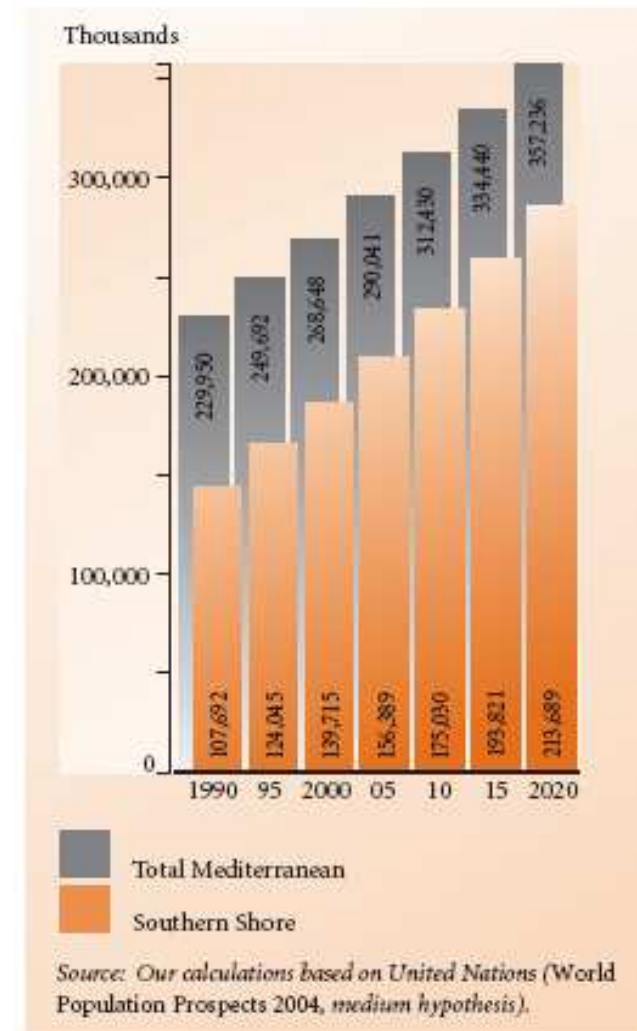


Chart 2 - The urban population of the Mediterranean, 2005





CIHEAM
www.ciheam.org

A rural world still populated



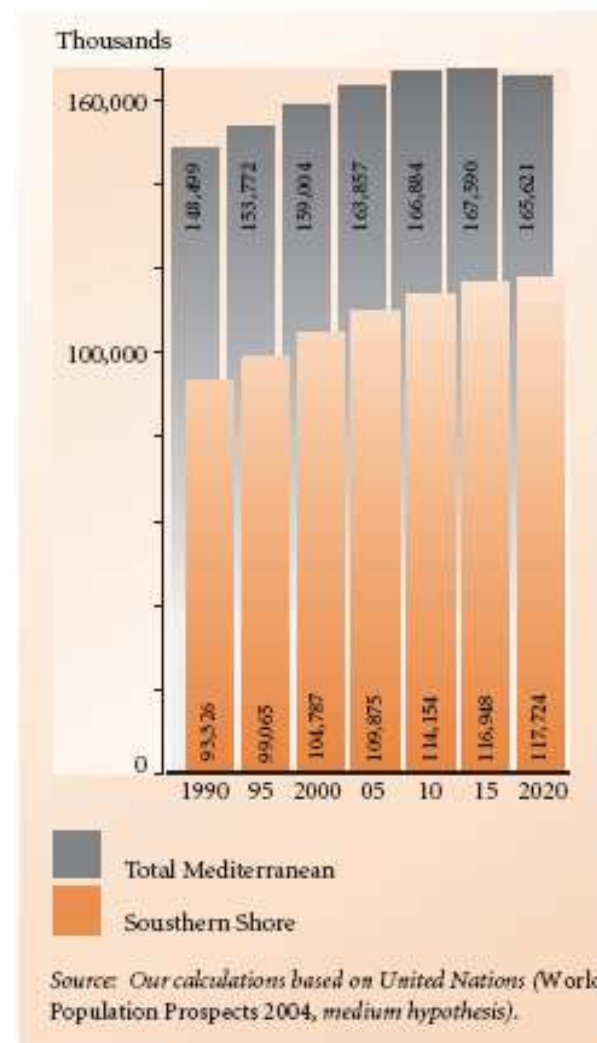
Map 4 - The rural population of the Mediterranean, 2005



8 21 33 44 58 % of the total population

Source: Our calculations based on United Nations (World Population Prospects 2004, medium hypothesis).

Chart 3 - The rural population of the Mediterranean, 2005



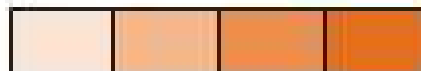


CIHEAM
www.ciheam.org

A rapid demographic ageing

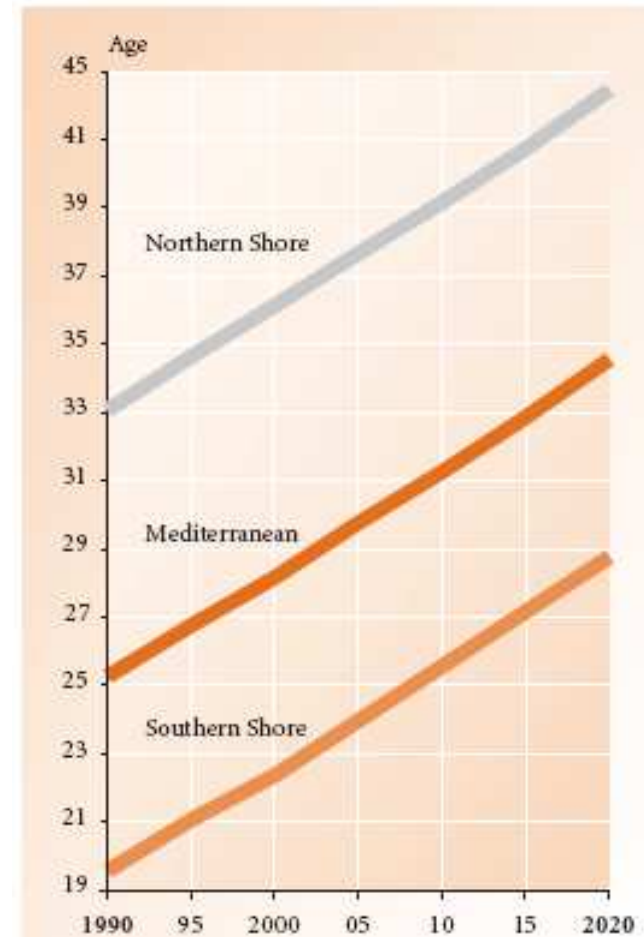


Map 5 - Age of the population, 2005



19 25 36 44 57 % of the total population

Chart 4 - Average age of the population, 1990-2020



Source: Our calculations based on United Nations (World Population Prospects 2004, medium hypothesis).



CIHEAM
www.ciheam.org

The development challenge



Annex 3 - Human Development Index of the Mediterranean



0.6 0.74 0.81 0.92 0.94



4.3 6.3 10.3 13.9 21.2 % Data not available

Source: UNDP Human Development Reports 2006.



CIHEAM
www.ciheam.org

Agricultural Labour forces



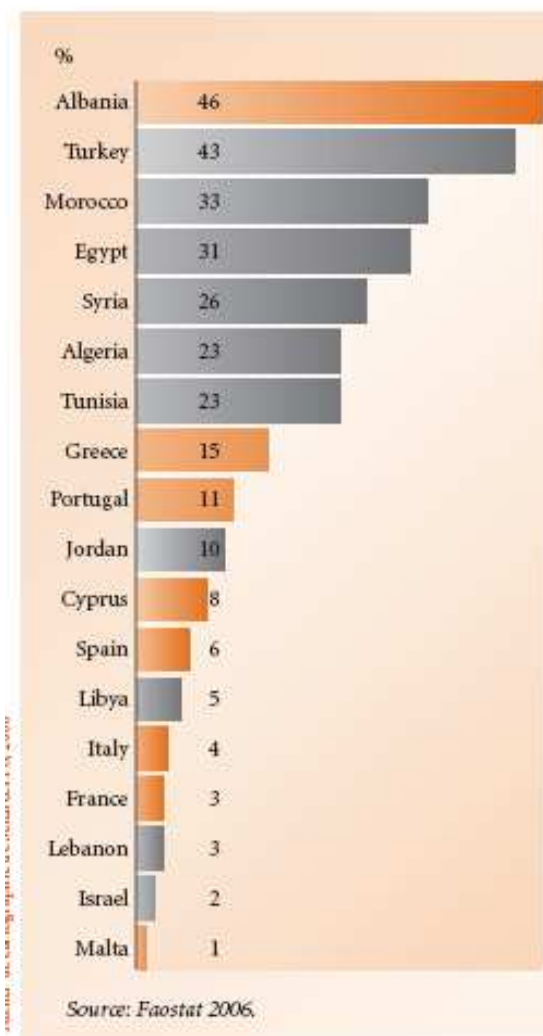
Map 2 - Share of working farm population in total labour force, 2004



1 8 23 43 46 % of the total labour force

Source: Faostat 2006.

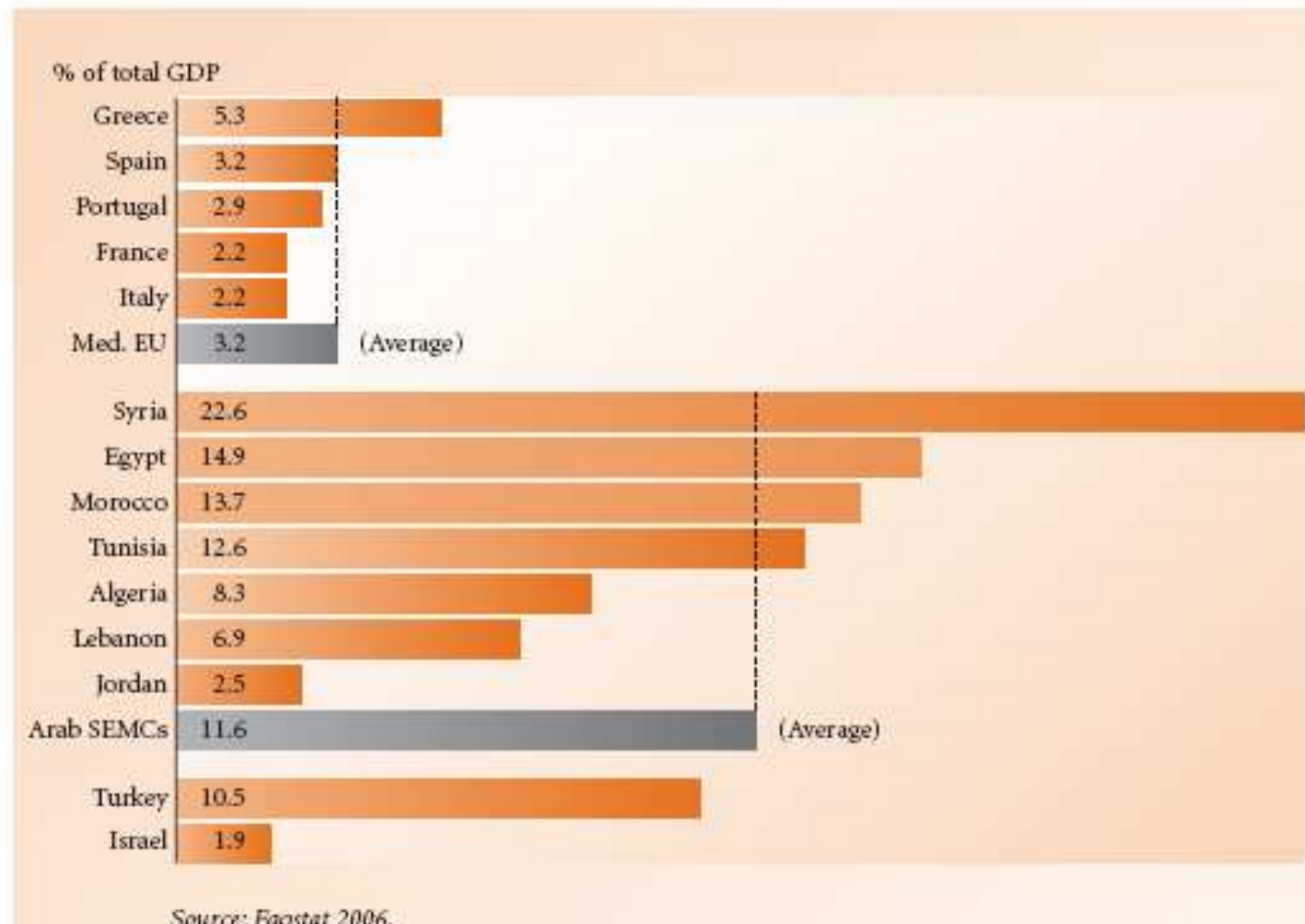
Chart 11 - Share of working farm population in total labour force, 2004



The core of the national economies



Chart 12 - Agriculture in GDP formation in the Mediterranean region, 1990-2005



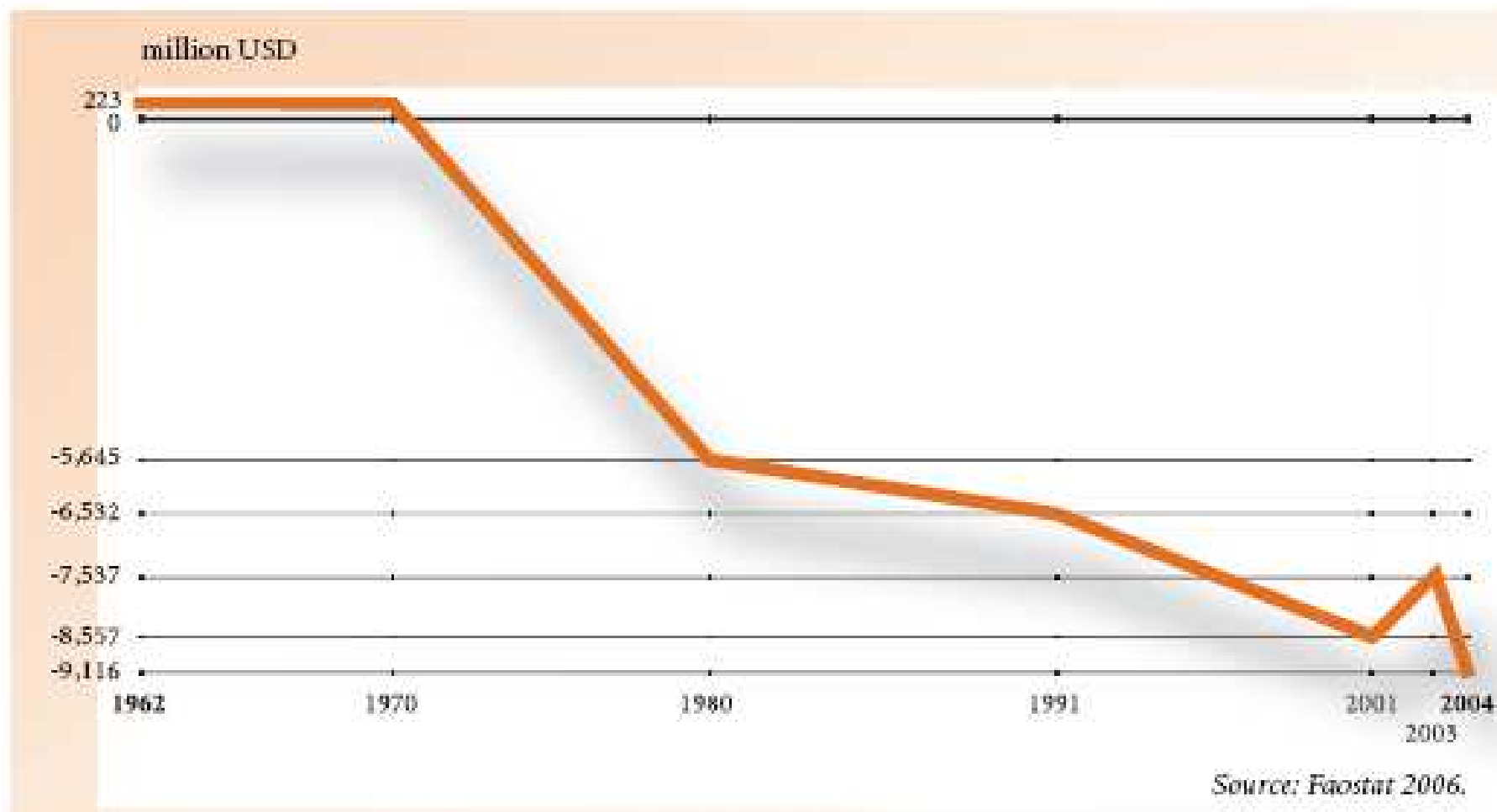


CIHEAM
www.ciheam.org

SEMCs: chronic food dependance



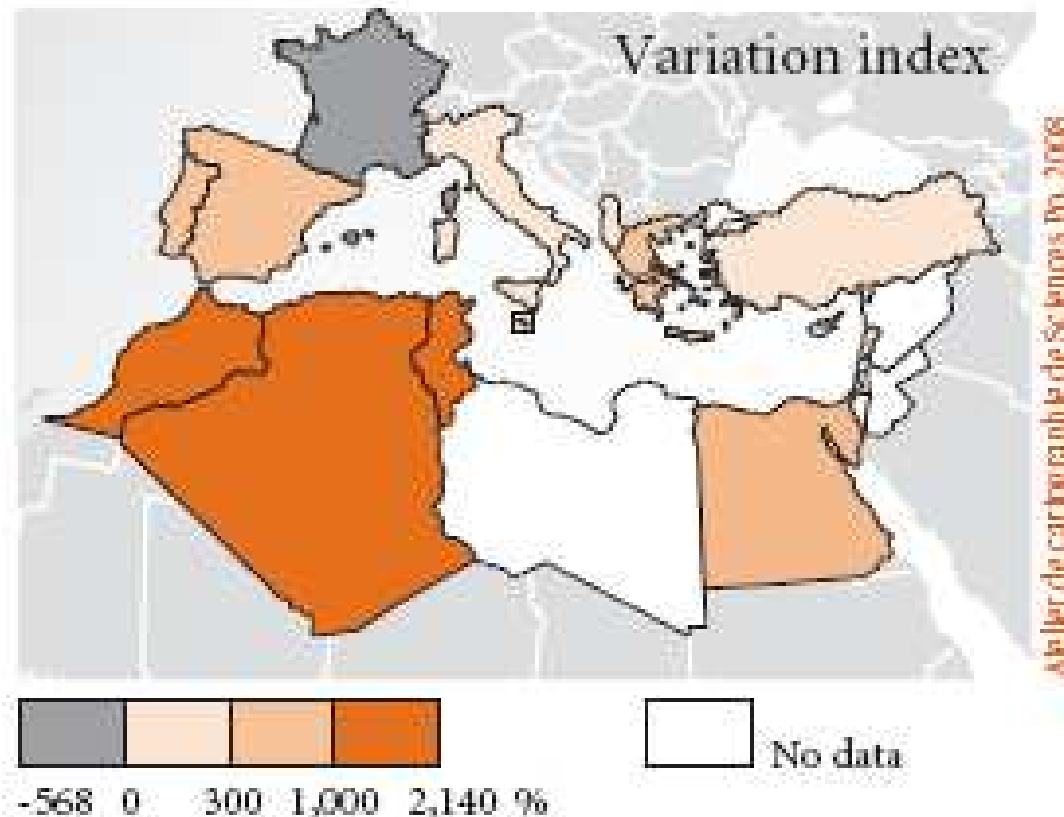
Chart 13 - Trends in SEMC agricultural trade balances



Cereals: a strategic issue



Map 3 - Net cereals imports
in the Mediterranean region, 1963-2003



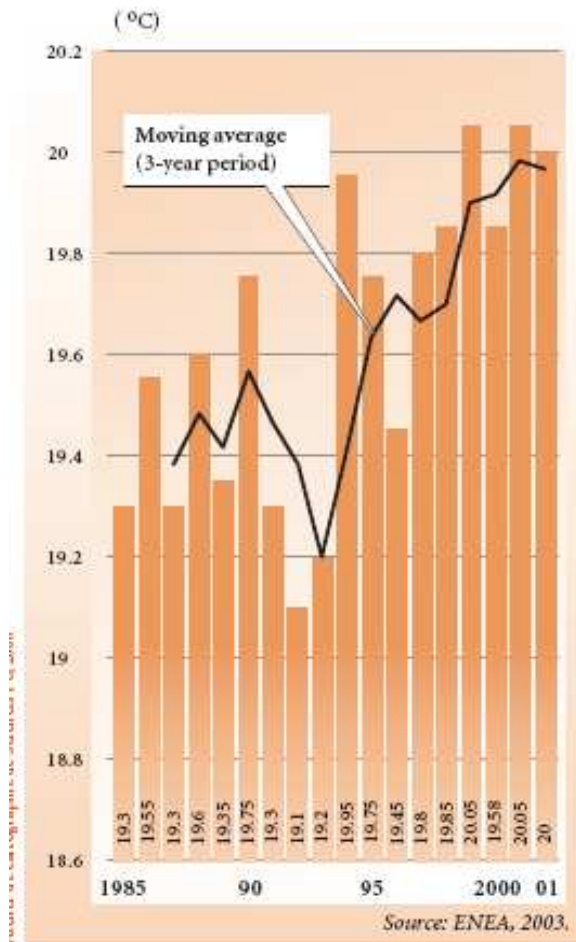
Source: Frostat 2006.



Climate change



Chart 1 - Trends in mean annual surface temperature of the Mediterranean Sea, 1985-2002



Several impacts on agro-food systems:

- Increase in the frequency of extreme weather conditions
- Expansion of the desertification process
- Intensification of water stress
- Development of zoonoses
- Biodiversity decline
- Economic effects
- Roll Back Human Development
- Political and strategic disturbance



CIHEAM
www.ciheam.org

Water: the Blue Gold ?



Chart 3 - Variation in per capita water resources, 1950-2025

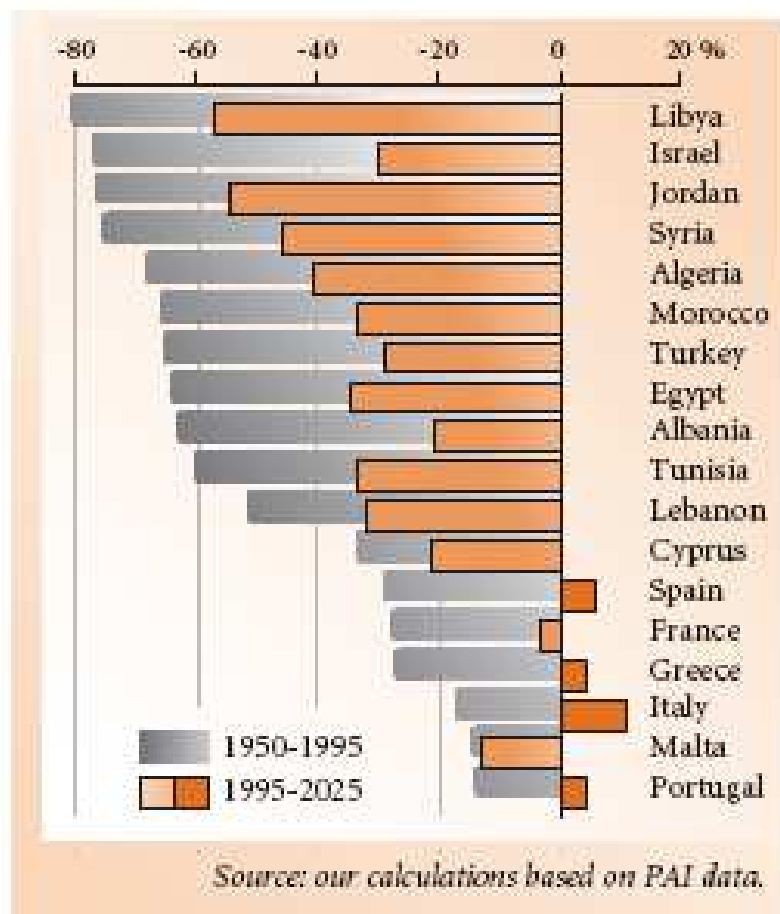
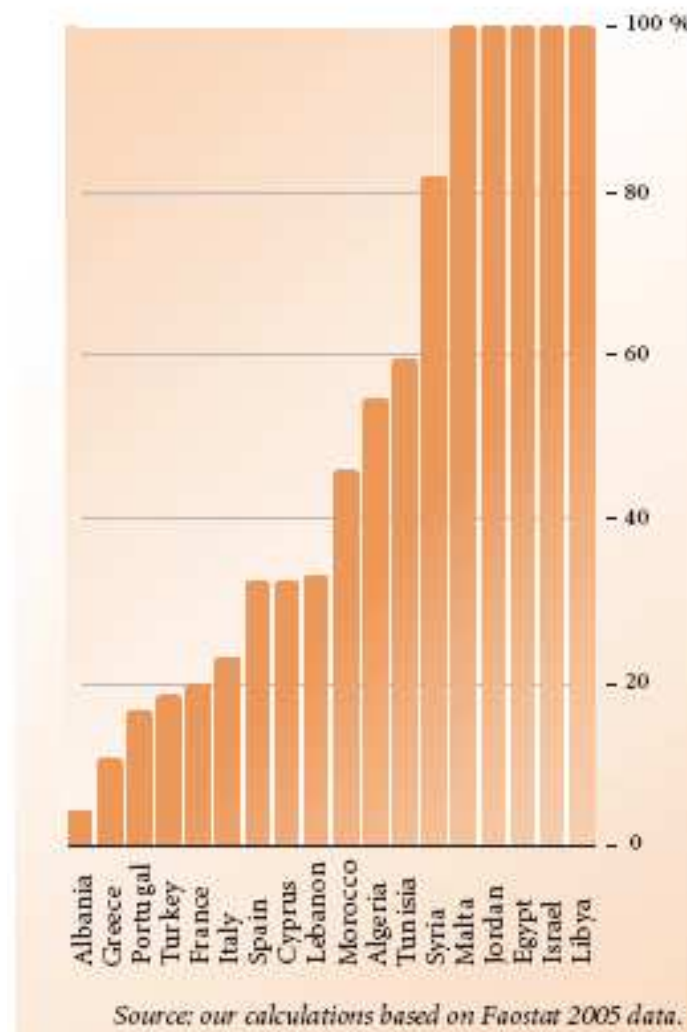


Chart 4 - Water exploitation index, 2003





- **Knowledge-based economies ?**
- **ICTs – a convergence aid or a new source of splits?**
asymmetries in technology and knowledge
- **Important changes for agro-food systems:**
duality of the agricultural landscape, rapid development of the large-scale retail trade, disruption of food production chains, logistical shortcomings, etc.
- **Rapid development of agricultural and food biotechnologies:**
hazards and progress
- **Rethinking agricultural training and research systems**
no scientific culture without scientific production





Food – the core issue in everyday Mediterranean life

But contrasting dynamics in the region

- **Food excesses in the North and aggravation of imbalances in the South**
- **New life styles, new dietary practices**
- **Decreasing consumption of traditional products**
- **Focus on both food safety and food security**
- **What will become of the Mediterranean diet?**



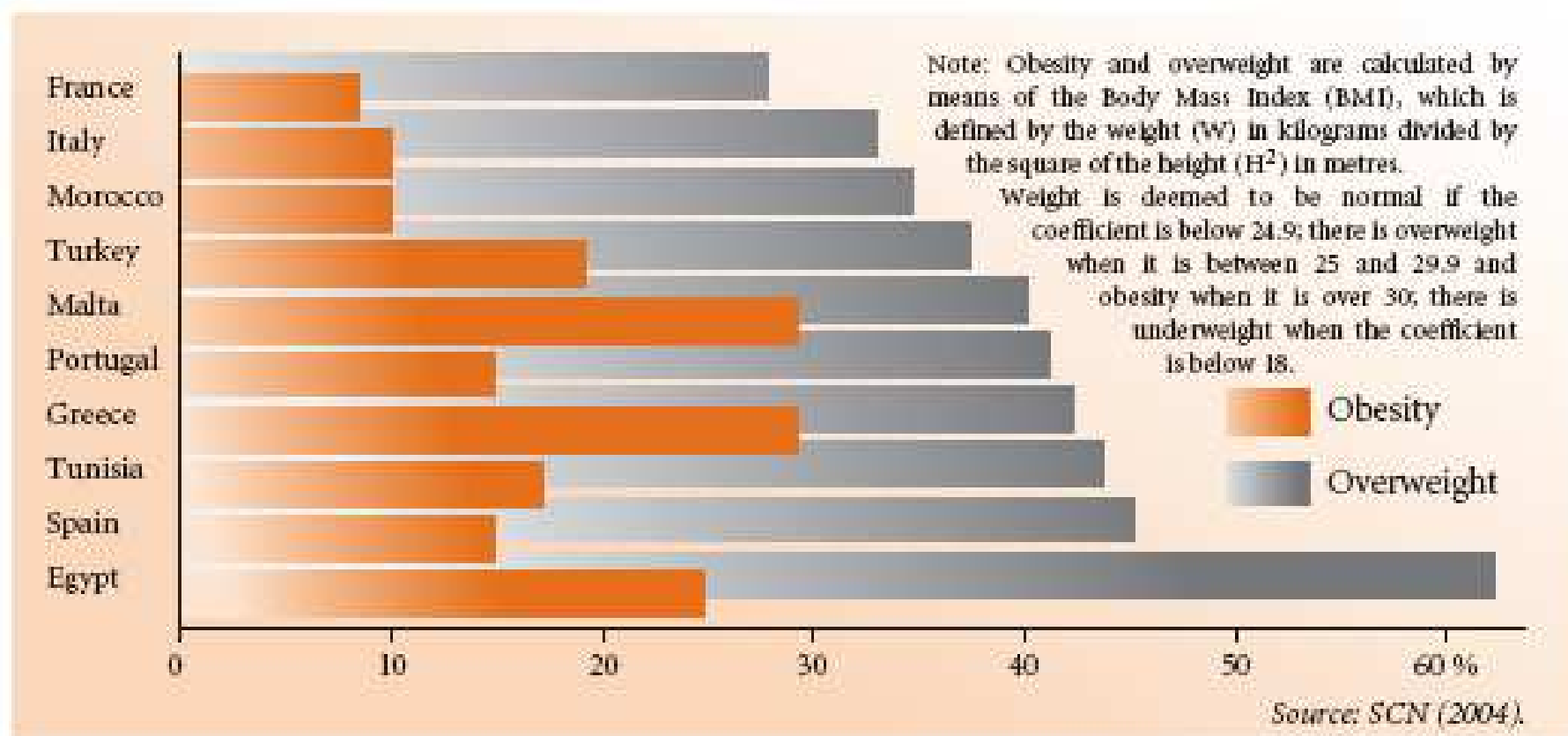


Public Health

A growing challenge



Chart 4 - Percentage of overweight and obesity in adults, 2004





Trends in modes of governance

- **The CAP in the North: first geared to quantity, now to quality given the "longing for things rural"**
- **In the SEMCs:**
 - **From interventionism to liberalisation**
 - **Precedence given to export crops**
 - **Poverty, lagging development, disconnections in coastal urban dynamics – hence the "misfortunes" of rural areas**
 - **New agricultural and rural plans geared to more sustainability**
 - **Emergence of civil societies in the Mediterranean rural world**



A worrying analysis



Two initial scenarios can be developed from the prospective analyses

1. A Mediterranean without conviction

- This is a trend scenario, the continuation of the current dynamics

Environmental degradation, regional divides, food disorders, a passive attitude to socio-demographic changes, fragility of agricultural systems in the face of trade globalisation, vulnerabilities in agricultural trade, limited technological innovation, lack of political interest in agriculture, distrust in Euro-Mediterranean relations

2. A Mediterranean under tension

- In this scenario, the trends are aggravated; it is the scenario of a region that is the epicentre of global tension

Increasingly coveted water and land resources, return to food insecurity, multiple impacts of climate change on agricultural systems and rural areas, spread of zoonoses, explosion of malnutrition, development of social inequalities, growing migratory flows, declining Euro-Mediterranean cooperation



5 challenges to be met

1. **Reconciling production and management of scarce resources**
2. **Ensuring food security and food safety**
3. **To develop the supply and marketing of agricultural commodities**
4. **To work out development strategies for rural areas**
5. **Strengthening and consolidating education and research capacities**



Two other scenarios are conceivable

3. A fragmented but reactive Mediterranean

- **This is a future where a multi-pace Mediterranean emerges**

Ad hoc partnerships, focus on emergency issues, cooperation à la carte, rivalries or agreements amongst State actors, role of the private sector, precedence given to reactivity, lack of foresight, no convergence or integration within the Mediterranean area...

4. A confident Euro-Mediterranean

- **For agricultural and environmental solidarity in the Mediterranean**

Agriculture and food are the key issues in Euro-Mediterranean cooperation that is built on new foundations of strategic priorities: responsible resources management, measures to ensure the security of food supply and to promote food that is good, clean and fair, integrated regional development, measures to combat climate change, emergence of a farm-to-table agro-food system, devising of a new CAP that is open to the Euro-Mediterranean region

Agriculture and Euro-Mediterranean cooperation



Several Proposals for action

presented to establish a Euro-Mediterranean Framework
for **Agriculture, Food and Rural Cooperation**

Mediterra 2008 is published to restate the triple question of the Future of the Mediterranean, its relationship with Europe and the place that agriculture can play in creating a strategic link between these two geographical masses whose destiny is bound together



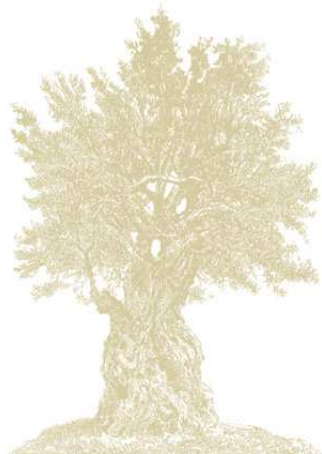
CIHEAM
www.ciheam.org

CIHEAM – General Secretariat

+33 (0)1 53 23 91 06

observatoire@ciheam.org

11 rue Newton - 75116 Paris - France



www.ciheam.org