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Analyses

Increasing space for organic agriculture in a changing Mediterranean

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The Mediterranean Basin is a deeply divided area, but at the same time deeply united by thousands of years of multi-cultural history and management of shared resources. Political conflicts and urbanisation, emigration, degradation of natural resources and socioeconomic marginalisation are worrying not just for its neighbouring countries but also in more distant parts of the world.

The role of agriculture is still important, as recognised in political speeches and government and foreign aid programmes for development. It is not only a question of restoring the equilibrium of agri-food trade balances, deeply in deficit in many Mediterranean countries, but also of the fundamental contribution which agriculture can give to conservation and development of the rural areas.

Sustainability in all of its aspects - economic, social, environmental and institutional - is the keyword for overcoming so many rivalries and for seeking appropriate answers to the pressures of globalisation.

Organic agriculture has grown in this area of the world only partially integrated into the local agricultural and institutional contexts. External forces and resources have been and remain dominant, especially in certain areas.

Organic agriculture has managed to attract the attention of local governments and economic operators and also to find space in discussion platforms and official strategy papers (concluding statement of the Euro-Mediterranean Ministerial Conference on Agriculture, Venice 2003 and the Mediterranean Strategy for Sustainable Development, approved in 2005 as part of the UNEP Mediterranean Action Plan).

Looking at the characteristics, the most recent trends and the unexplored potential of organic agriculture, it can be stated that all the conditions exist for the organic sector to get integrated into the present dynamics of the Mediterranean agri-food systems giving a significant contribution in terms of innovation and sustainability.

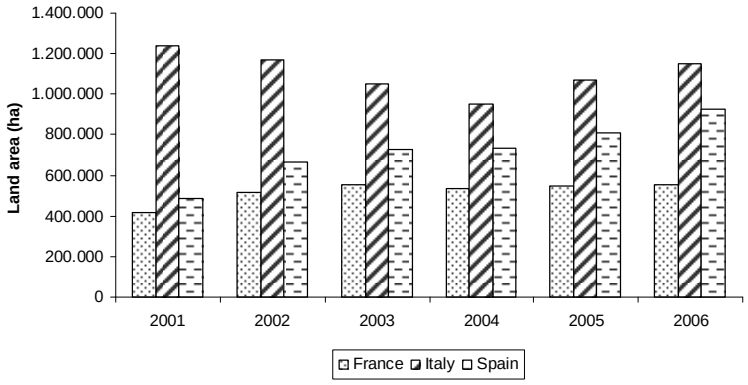
Structural aspects, commercial dynamics and institutional developments

The difficulties of data collection and the unreliability of statistical information for organic agriculture are well-known problems to those operating in this field. However important progress has been made in last years.

Contents of this edition:

In 2006, about 5.6 million ha in the Mediterranean was under organic management including around 2 million ha of wild collection and providing work for about 140 thousand operators. In five years from 2001 to 2006 figures have doubled. Italy is the leading country in the Mediterranean (as well as in Europe) in terms of land area (over 1 million ha) and number of farms (50 thousand) (Figure 1). Spain has rapidly closed the gap with Italy in the last few years in terms of land area (around 1 million ha) but not in terms of operators. France had a period of stagnation (around 500 thousand ha), but the desire to catch up is clear and strong as the adoption of the Action Plan for the sector shows. The weight of the organic sector is much more modest in the other EU Mediterranean countries.

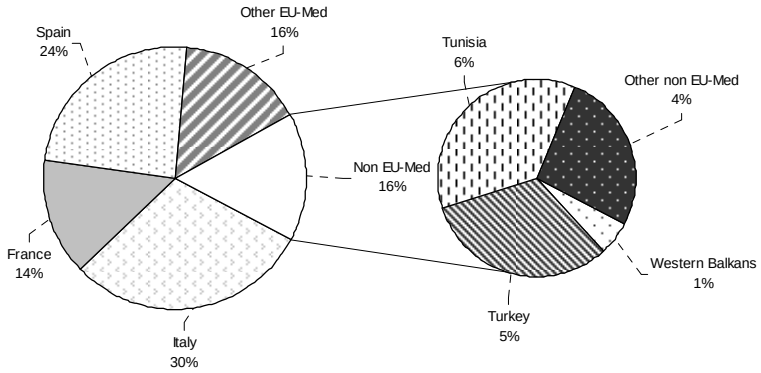
Figure 1
Organic agricultural land area in France, Italy and Spain, 2001-2006



Source: our elaboration based on data from Eurostat and MOAN

Tunisia and Turkey (Figure 2) lead the Southern and Eastern Mediterranean (SEM) countries. While in the Western Balkans (WB), Serbia is the leader with large areas dedicated to wild collections, Croatia is in second place, albeit a long way behind (see statistical appendix).

Figure 2
Distribution of agricultural land area used for organic agriculture in the Mediterranean, 2006



Source: our elaboration based on data from Eurostat and MOAN

A visit to Biofach fair is quite sufficient to realise that nowadays the Mediterranean counts in organic agriculture. Many interesting operators are normally present with a rich and diversified range of products: fresh and preserved fruits and vegetables, pulses, olive oil and olives, dried fruits, dates, herbs and spices, medicinal plants, honey, cereals, animal products, argan oil. In some EU Mediterranean countries like France, Italy and Spain, organic agriculture started with few pioneers since the 60s, and growth was affected by the same factors conditioning the expansion of organic agriculture in Europe (legal framework, institutional context; national organic movement; financial support).

CIHEAM

Founded in 1962, CIHEAM is an intergovernmental organisation comprising thirteen member countries from the Mediterranean Basin.

CIHEAM is made up of a General Secretariat (Paris) and four Mediterranean Agronomic Institutes (Bari, Chania, Montpellier and Zaragoza).

In pursuing its three central missions (education, research and cooperation) CIHEAM has established itself as a reference in its fields of activity: Mediterranean agriculture, food and rural development.

At present, Mr Abdelaziz Mougou is President of CIHEAM and Mr Bertrand Hervieu is Secretary General.

Organic agriculture

Organic agriculture is characterised by rational management of the land and respect for biological cycles and the environment. Harnessing our understanding of ecological factors, it produces quality food through a more balanced, autonomous, economic, non-polluting approach to production.

In May 2007, an FAO International Conference on organic agriculture and food security concluded that organic agriculture worldwide could, with the right political will, help increase food security, reduce the impact of further climate change, alleviate the problem of water scarcity, protect agrobiodiversity and ensure its sustainability, improve nutrition intake and stimulate rural development.

In France and in some Italian regions, the adoption of regulations for this sector occurred before the EC Reg. 2092/91. This is indicative of a particular sensitivity towards organic farming which also led to the growth of an organised movement and the development of the local market. France and Italy are amongst the most interesting markets in Europe after Germany and Great Britain (Organic Monitor 2006). Spain is worth watching, due to the growth and organisation of its exports and the promising development of the domestic market. The Portuguese and Greek markets are less important and are mostly directed at exports.

A different picture stands for the WB countries where nuclei of organic pioneers existed prior to 90s conflicts. However it is only in the last few years that the process of Europeanisation together with international cooperation projects have given an important boost to development of the organic sector.

This has contributed to the creation of a framework of regulations and institutions and to the development of exports for some competitive products to the European markets. The domestic market is almost nonexistent apart from some urban areas and seems to be strongly connected to the activity of local organic associations who play an important role in the processes and areas of development of this sector.

Bibliographic references

- Organic Monitor (2006). *The global market for organic food and drink: business opportunities and future outlook*. Organic Monitor, London
- Santucci F.M., Monotti C. and Paffarini C. (2007). *Prodotti biologici dal Sud ed Est del Mediterraneo: prospettive al 2010*. Presented at SANA 2007.
- Rundgren G. (2007). *Best Practices for Organic Policy: What developing country governments can do to promote the organic sector*. UNEP-UNCTAD CBTF.

Organic agriculture in the SEM countries is much more recent and is mainly tied to external forces and factors that influence its growth such as the role played by *i)* exporters and foreign agri-food firms which have been developing commercial outlets in European markets; *ii)* governments wishing to increase exports and reduce the agri-food trade deficit; *iii)* international cooperation (projects financed by international donors and carried out by foreign and/or local NGOs). While the influence of the international organic movement has been and still is quite small (Santucci et al., 2007). The European context has not only had a direct impact on the growth of organic agriculture in Mediterranean EU countries but also on SEM and WB countries. Many producers in these countries still look to the European markets (mainly Germany and England, but also France and Italy) to place their organic products. Differentiation of commercial outlets is a tendency but is still mostly limited to countries with consolidated commercial ties either in the Gulf area (Lebanon) and/or ties with the USA (Israel); few products are also exported to Japan. Although exports dominate the organic sector in most of the SEM and WB countries, it is important to underline the albeit slow and irregular emergence of the local markets.

At the same time, important quantities of organic products not earmarked for export are sold as conventional products. On the other hand, the adoption of national regulations for organic agriculture, strongly connected to EC Reg. 2092/91, and the creation of a national system are intended by many SEM and WB countries as necessary steps to take in order to be admitted to the list of Third Countries in the equivalence system. This is a long and complex process completed only by a few countries since 1992. Only Israel, Tunisia and Turkey have applied for recognition. Israel is on the list, while Tunisia and Turkey recently received the final comments as to the first stage of evaluation.

Most organic products imported into the EU markets arrive from non-equivalent Third Countries through a complex system of national authorisations. The need to encourage trade with Third Countries as well as ensuring transparency and safety according to the regulations, has led the EU to consider substantial modifications to the import system. In fact since EC Reg.1991/2006 came into effect in January 2007, the import system for organic produce has been modified. The principles of this Regulation were reiterated by the Regulation which revises all the rules (Reg. EC 834/2007) and which will come into effect in 01.01.09. This means that the Third Countries can still be included in the list, but the Commission will also be able to authorise competent inspection bodies to certify equivalence or compliance of a product from a Third Country.

In relation to this, the reference to the guidelines in the *Codex Alimentarius* about the evaluation of equivalence is criticised by those who believe that the international rules are not as rigid as the regulations to which EU farmers are subject. Some sustain that this disparity distorts the competition in European markets between similar organic products from SEM and WB and EU Mediterranean countries.

Moreover, the inspection bodies recognition introduced by the new import system, appears to be more immediately viable for the international inspection bodies operating at the world level and often already have the obligatory EN 45011/ISO 65 accreditation. While the relatively young local inspection bodies in some Third Countries often have aid from international cooperation, they have much more limited resources for meeting the requisites of the compliance list and so the related accreditation is a very difficult obligation. In this context, Third Countries have fewer incentives in creating a structured national organic system, of which the same inspection bodies are important components. This is worrying since the creation of an adequate institutional framework is an important stage towards the sustainable development of organic agriculture in these countries. The SEM countries have already taken many steps in this direction. The influence of the European situation on the development of organic agriculture in the SEM countries is not limited to regulations and trade, but it is evident in the development of the support policies.

Some experts assert that in countries where organic agriculture is mostly orientated towards export, national regulations can be useless or somehow cumbersome, since valid and secure trading contacts and competent and credible inspection and certification structures are enough to facilitate the export of organic products (Rundgren, 2007). Egypt and Morocco are examples of countries with no national organic regulations that have been exporting their products successfully to the international markets.

On the other hand, the existence of a national law for organic agriculture is a sign of a precise political desire to recognise the sector and its role in the national agri-food context. Even when national organic laws are not fully implemented, their adoption has been an important step paving the way towards the creation of specific divisions in the agriculture ministries and towards the introduction of specific support policies for this sector (contributions to certification costs, payments per UAA, incentives for projects).

Some SEM and WB countries have followed the example of the EU and begun to adopt an integrated approach more or less supported by cooperation initiatives and financed by international donors. This is done by inserting specific references to the organic sector in strategy and programming papers concerning agriculture and rural development, but most of all by initiating the planning and execution of specific action plans for the development of organic agriculture (Albania, Macedonia, Tunisia and Turkey).

The creation of networks for information, problems and solutions sharing is a strongly felt need among many public and private operators in organic agriculture in the SEM and WB countries. Many cooperation projects already exist as well as a permanent initiative like the Mediterranean Organic Agriculture Network (MOAN).

Critical points and open questions

Although organic agriculture has made important progress, many factors have limited its development so far. The difficulties of marketing organic products remain one of the weak points of organic agriculture in the Mediterranean. The causes include poor ability to valorise production, the lack of infrastructure for processing and distribution, and the lack of adequate marketing and consumer information initiatives (Santucci et al. 2007).

The organic sector in the Southern and Eastern as well as most of the EU Mediterranean countries is heavily dependent on the foreign markets. The situation is further complicated by the competition between similar Mediterranean products from different countries. Awareness of the risks associated with a development heavily weighted towards exports is now encouraging initiatives to support the domestic market in at least some countries.

A crucial issue for the future of Mediterranean organic agriculture concerns the strengthening of individual and institutional capacities. Many SEM and WB countries would benefit from training programmes about organic agriculture on technical, regulatory and market aspects. Thanks to the differences in the stage of development of the organic sector in the Mediterranean various experiences are available through exchange and networking initiatives for profitable collaboration to emerge among stakeholders.

Skills development is also a powerful tool for harnessing the potential of organic agriculture and the growth of local operators and above all reducing the risks of a development which is too tied to globalisation. In order to place Mediterranean organic agriculture in virtuous and long-term sustainable dynamics, skilfully weaving together global opportunities, on one hand, and local knowledge and capital, on the other, is needed. This involves individual commitment associated with collective efforts for effective participation in defining the rules of the game. To put it in a word, this is a *glocalised* development path, for which there appear to be increasingly interesting platforms for dialogue and cooperation.

Lina Al-Bitar and Patrizia Pugliese

Links

- **European Union, Organic agriculture**
  http://ec.europa.eu/agriculture/organic/home_en
- **FAO, Organic agriculture**
  http://www.fao.org/organicag/
- **Organic Farming Research Foundation**
  http://ofrf.org
- **International Foundation for Organic Agriculture**
  http://www.ifoam.org/

Organic agriculture across the world

In 2006, organic agriculture was practised by nearly 700,000 operators across the world and accounted for about 30 millions hectares, barely 0.65% of all agricultural land on the planet.

The largest areas of land devoted to organic crops are found in Australia (12.3 million hectares, or 40% of the world total), China (2.3 million hectares), Argentina (2.2 million hectares) and the United States (1.6 million hectares).

Nearly 39 billion dollars' worth of organic produce were sold worldwide in 2006, more than twice the amount in 2006 (18 billion dollars' worth). However, about 97% of these products are consumed in Europe or North America.

Steps Leading To The "National Action Plan" For Organic Agriculture In Turkey

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Historical background

The initial stage of organic farming in Turkey is alike to the other developing countries. It started in mid 80s upon the European market demand. Turkey was and is known as the prime producer of dried fruits and nuts, and the first organic products were these traditional goods. For nearly a decade, organic production followed the private rules of the certification bodies and later the EU legislation. The first Turkish regulation on organic agriculture was issued in 1994 and was similar in its core to the EC Reg. 2092/91. One of the milestones in the Turkish organic movement was the establishment of the Turkish Association of Organic Agriculture (ETO), an NGO that acted as the major source for dissemination activities on organic agriculture.

In the initial stage, priority was given to education and training activities. The first training program was organized in 1997 as a three-week course for extensionists of the Ministry of Agriculture and Rural Affairs (MARA) with the support of ETO and Ege University. The aim was to train MARA staff in every province. The Ministry organized it in Izmir, the province where all organic activities are concentrated. The lessons learned from this first experience contributed to the following training programs and improved their performance.

After two years, 2-3 engineers per province were trained through these training programs and a special awareness raising seminar was organized for the directors. The follow-up activities, however, revealed that most of the staff trained were sent to other provinces and assigned duties other than organic agriculture. In following years, short training programs for trainers were organized annually and as a consequence, organic teams were formed within MARA structure, and are now established in every province for farmers training. Their numbers vary according to the importance of organic production in the province.

Such in-service training programs are still ongoing. Data collection is a vital process in organic agriculture, and reliable and updated data are the basis for successful strategic planning. ETO started to collect unofficial data in 1990 through the inspection and certification bodies. When the first regulation was put into force, the Ministry was officially responsible for data collection starting in 1996. In January 1996, a regulation contained an article which made compulsory the declaration of all exported organic goods. At present, the Ministry has set up a system which is complying with the EUROSTAT.

The MARA decided to support research on organic and started by allocating a budget to almost all its research institutes to initiate projects. Short courses were then modified to address researchers in the National Agricultural Research System (NARS). During the first two years, research projects were proposed mainly to test various organic fertilizers in certain crops. During the second phase, research objectives were more oriented towards problem solving or optimization of organic production, and the methodology was much more advanced. There is a yearly meeting held by the MARA DG Agricultural Research where all projects, are discussed with the presence of all interested parties. A network of Learning Centres composed of NAR centres already evolved in organic research is foreseen in the National Action Plan.

In the 1990s, organic agriculture was mainly handled by two experts working under the 'Research, Planning and Coordination Department'. In 2003, the major change occurred when the 'Alternative Agricultural Techniques Department' started to operate under the General Directorate for Agricultural Production and Development within the Ministry with the support of two committees: the Organic Agriculture Committee and the Organic Agriculture National Guidance Committee. The first one is composed of members coming from related departments of the MARA and has the mandate to take decisions. The second has a more advisory role and gathers members from different ministries, universities, professional organizations and non-governmental organizations. Through this configuration, the MARA has developed a linking structure between related departments and all stakeholders. The stakeholder network is one of the tools to achieve the objectives stated in the National Action Plan (NAP).

To strengthen the capacity of MARA, the Turkish State Planning Organization supported a framework project on organic agriculture with training and research activities. Moreover, a FAO TCP project was carried out to increase awareness for organic agriculture with a special focus on different agroecosystems through which workshops were organized and reflections were gathered from nearly 1200 participants at country level to prepare a project to promote organic agriculture. A 16 month project, EUROPEAID/121154/D/SV/TR, funded by the EU for alignment of legislation and for institutional building of the Ministry was implemented (2006-2007) through which many stakeholder meetings were held to set a national strategy for organic farming and an action plan.

In 2007, the area certified organic in Turkey was nearly 174,000 ha from which 50,000 ha for wild picking, and the number of operators was 16,000. Organic export market is mainly carried out by contracting farmers. The contracting companies provide all the technical back-up (know-how and inputs) and cover the inspection and certification costs. This approach is utilized only for the export and thus exerts a restriction on the development of the domestic market.

There are some support mechanisms for organic farmers even if the amounts are rather limited. These include:

- Reduced interest rate (60% reduction) of loans for registered organic farmers given by the Agricultural Bank. From 2004 to 2008 August, over 2,000 operators received a credit of nearly 30 million Euros.
- Additional Direct Income Support Payment for organic farms has been paid: around 15 Euro/ha for 2005 and 2006 and 25 Euro/ha for 2007.

There are two major additional activities that are expected to trigger organic agriculture. One is a protocol signed between the MARA and State Water Works for implementing organic management through training of farmers in the protection zones of 13 dams. The second one is ÇATAK, a pilot project supported by the MARA to introduce environmentally friendly agricultural land protection in degraded areas. The aim of these efforts is based on Agriculture Law (No. 5488-Article 9) that accepts organic farming as a tool to conserve biodiversity and genetic resources as well as bio-safety. Moreover, the Undersecretary for Foreign Trade has newly adopted two supportive actions for the exporters: support for the inspection and certification costs and support for the analysis costs of organic samples that conform with the standards.

National Action Plan for organic agriculture

The MARA prepared in 2007 the Turkish Organic Food and Farming Action Plan based on the National Organic Strategy finalized by the MARA and the Organic Farming National Guidance Committee (OTYK). The aim of the plan is stated as *'to support the sustainable development of organic agriculture and the market for organic products in Turkey and abroad, as a tool for rural development and the protection of the environment and human health in Turkey'* (Bagatur et al., 2007). The Organic Food and Farming Action Plan has four general objectives:

- Improve implementation of policies and practical support for organic food and farming among all related government departments;
- Strengthen stakeholder network in organic agriculture;
- Support development of organic production;
- Support development of domestic and export markets for Turkish organic products.

Specific objectives are further proposed as:

- Use organic agriculture as a tool in achieving rural development objectives;
- Enhance collaboration between the MARA and all related governmental departments to maximize organic production and processing;
- Harmonize Turkish legislation with new EC Reg. 834/07 by revising the Turkish Organic Law and Standards;
- Increase capacity of the MARA and other government departments to effectively implement appropriate policies;
- Maximize the efficiency of stakeholders network to guide formulation and implementation of policy and practice to support organic agriculture in Turkey (production, processing and internal/export markets);
- Support development of organic farming;
- Improve technical and economic performance of organic food and farming systems;
- Harmonize organic standards and accreditation working with the Turkish Accreditation Institution (TURKAK);
- Promote Turkish organic products nationally for local markets and internationally for export markets (awareness, common logo, slogans etc.).

Besides these, 22 operational objectives and 52 indicative actions are proposed, prioritized according to their impact factor and responsible and identified in the action plan.

MAI Chania

Students taking the MSc Programme are first given an introduction to sustainability, in which organic farming (OF) is compared in terms of its ecological footprint and market implications with integrated crop management (ICM)

This introductory section is followed by sections on soil and water management, land management, plant breeding, seed production and plant protection, which also address and compare OF and ICM theories and practices. The 1st year curriculum ends with field trips to ICM and OF farms.

As to research projects, MAICh is currently involved in a three-year collaboration with a large private company. The aim is to evaluate compost of animal origin as a substrate in hydroponics *or* an organic fertilizer in outdoor experiments (on olive trees, vegetables and vineyards).

www.maich.gr

Integration of organic agriculture into rural development programs

Organic agriculture matches with objectives related to rural development as mentioned in the 9th Development Plan (2007-2013), Agriculture Strategy Paper, National Rural Development Strategy and EU pre-accession assistance to rural development (IPARD) in Turkey. The Turkish National Rural Development Strategy prepared for 2007-2013 also integrates organic agriculture. It sees: *"Existence of organic farming potential"* as an existing strength of rural Turkey for building upon, and *"The development of consumer consciousness and increase in demand for healthy, quality, organic products"* as an opportunity to *"increase agricultural competitiveness and income"*.

Organic agriculture is stated under two strategic objectives aiming at '*Economic Development and Increasing Job Opportunities*' and '*Improving Rural Physical Infrastructure Services and Quality of Life'*. As a priority to increase competitiveness in agriculture and food, investment support will be provided for *"sustainable use of local knowledge, skills and resources to diversify the agricultural production by such activities as … organic farming"*.

Another priority is that, *"measures will be taken and activities will be supported for spreading organic agriculture and good agricultural practices"* in order to improve environmentally-friendly agricultural practices (Redman, 2007). The proposed IPARD Plan also supports organic agriculture, and some of its financing lines give priority to organic production/processing.

Bibliographical references

- Bagatur C., Ananias V., Stopes C. and Dessane D. (2007), *Report on Turkey Organic Food and Farming Action Plan,* Europeaid/121154/D/SV/TR, 22 October 2007.
- Redman M. (2007), *Report on Opportunities for Organic Food and Farming in the Turkey Rural Development Plan,* Europeaid/121154/D/SV/TR, 16 November 2007.

Conclusion

The Turkish experience that led to the National Action Plan can be an example of a solid basis that contributes to the implementation and monitoring built through cooperation between the State (MARA), NGOs (ETO) and other stakeholders (National Guidance Committee). Actions taken during this phase targeting legislation, training, research, data collection, institutional building, promotion of farmer organizations, integration into rural development and environmental protection policies will contribute to the rapid and sound development of organic agriculture.

The mandate of the MARA is more limited to agricultural and food products. In other fields where organic production intervenes there is a need to get the involvement of other ministries or state offices. This is one of the specific objectives of the NAP. With the exception of the Undersecretary for Foreign Trade, their link with the current state-of-art of organic agriculture is very limited and only through representation in the National Guidance Committee. Taking into consideration issues such as the rural development, multi-functionality, non-food products, agro-ecotourism or the domestic market, there is an urgent need to generate initiatives by these offices. One major drawback in the implementation of the NAP is the weak collaboration among state offices and lack of expertise.

The major market is still the export market, however, significant attempts are in place for the development of domestic market as the open market started by Bugday (NGO) and specialized shops of CityFarm. The action plan foresees a sound development of the domestic market in order to achieve sustainability in the supply chain. Even if there is no significant financial support for organic farmers, the Action Plan targets further financial and technical support for the farmers. However this is going to be strongly dependent on the economic viability of Turkey during the coming years. All other supportive measures namely support for research and training and inclusion of organic as a priority area of IPARD are also expected to ease the implementation of NAP.

Uygun Aksoy and Müfit Engiz

Statistics on organic agriculture in the Mediterranean

Statistical dossier prepared by MAI Bari
Lina Al-Bitar, Marie-Reine Bteich, Patrizia Pugliese

The following table, based on contributions of MOAN delegates, shows the 2006 organic statistics in EU, Southern and Eastern Mediterranean and Western Balkan countries which have been commented in the overview text. For each country the table reports in detail the organic land area (with and without wild collection), its share in total national agricultural area and the number of organic operators.

	Organic Statistics in EU, Southern and Eastern Mediterranean, and Western Balkan countries					
		Agricultural area[a] 2005 (ha)	**Organic agricultural area 2006 (ha)**	**Total organic area[b] 2006 (ha)**	**Share of organic agricultural area/ agricultural area (%)**	**Number of organic operators (2006)**
	Sources	*FAOSTAT 2008*	*MOAN 2008[c]*	*MOAN 2008*	*Our calculations*	*MOAN 2008*
EU Med. Countries	**Cyprus**	165,000	1,979	1,979	1.20%	305
	France	29,569,000	552,824	552,824	1.87%	17,477
	Greece	6,359,000	302,264	302,264	4.75%	24,666
	Italy	14,694,000	1,148,162	1,148,162	7.81%	51,411
	Malta	10,000	20	20	0.20%	11
	Portugal	3,680,000	269,374	269,374	7.32%	1,660
	Slovenia	508,000	26,831	26,831	5.28%	1,992
	Spain	29,030,000	926,390	926,390	3.19%	18,318
Western Balkan Countries	**Albania**	1,123,000	171	1,201	0.02%	93
	Bosnia and Herzegovina[d]	2,147,000	714	488,804	0.03%	60
	Croatia	2,695,000	6,012	23,670	0.22%	342
	Macedonia, FYR	1,242,000	509	2,101	0.04%	104
	Montenegro	518,047	25,051	158,851	4.84%	15
	Serbia	5,595,000	906	1,102,906	0.02%	48
Southern and Eastern Med. Countries	**Algeria[e]**	41,150,000	1,550	2,400	0.00%	61
	Egypt	3,520,000	14,165	14,165	0.40%	460
	Jordan	1,012,000	1,024	1,024	0.10%	25
	Lebanon	388,000	3,470	3,470	0.89%	213
	Morocco	30,395,000	4,216	104,216	0.01%	12,051
	Palestinian Territories	372,000	641	641	0.17%	303
	Syria	14,008,000	30,493	30,493	0.22%	3,256
	Tunisia	9,769,000	154,793	220,476	1.58%	952
	Turkey	41,223,000	100,275	192,789	0.24%	14,737
Total		**239,172,047**	**3,571,834**	**5,575,051**	**1.49%**	**136,509**

(a) *According to the standard classification used by FAO the Agricultural Area refers to: (i) arable land - land under temporary crops, temporary meadows for mowing or pasture, land under market and kitchen gardens and land temporarily fallow. The abandoned land resulting from shifting cultivation is not included in this category. Data for arable land are not meant to indicate the amount of land that is potentially cultivable;(ii) permanent crops excluding land under trees grown for wood or timber; and (iii) permanent pastures.*

(b) *Include wild collection areas that are very large in particular in the Western Balkan countries.*

(c) Al Bitar 2008. Organic farming in the Mediterranean: Towards Further Development. In: Willer, H., Yussefi-Menzler, M. and Sorensen, N. (Eds.) 2008 The World of Organic Agriculture. Statistics and Emerging Trends 2008. IFOAM FiBL, Frick, Switzerland.

(d) Bosnia and Herzegovina consists of two entities, the Federation of Bosnia and Herzegovina (FBiH) and Republic of Srpska (RS), in accordance with the Dayton Peace Accord. The Ministry of Agriculture is at the entity level (Organic Statistics 2006: FiBH: 488,537 ha including wild collection, 49 operators; RS: 267 ha, 11 operators).

(e) *Figures for Algeria underestimate wild collection and forage crops.*

Interview

Samia Maamer Belkhiria

- *Head of Organic Agriculture Unit at the Tunisian Ministry of Agriculture and Hydraulic Resources*
- *Tunisian Delegate to the MOAN*

Q - Which figures would you cite to illustrate the current trend in organic agriculture in Tunisia?

I have to say that the figures on organic agriculture have grown exponentially since Tunisia's organic agriculture sector was first launched in 1999. A special form of organisation has been developed for the entire sector and all legislation and practical measures have been tailored to this model, which was designed to be sound and reliable so that all organic products produced in the country would be sure to enjoy consumer confidence. As of April 1999 a whole body of legislation has accordingly been passed: Law No 30 of 5 April 1999 on organic agriculture; Decree No 2000-409 of 14 February 2000 on conditions governing accreditation of inspection and certification agencies, and inspection and certification procedures in organic agriculture; Order of 8 February 2001 on standard specifications for plant production by organic methods; Order of 9 July 2005 on standard specifications for animal production by organic methods; Order of 3 December 2005 on standard specifications for preparatory measures by organic methods; Decree No 2006-3057 of 20 November 2006 establishing the Regional Centre for Research in Horticulture and Organic Agriculture, with stipulations on its organisation, operation, and so forth.

In 2001, the amount of land allocated to organic agriculture in Tunisia was around 16,500 hectares. Today it is more than 260,000 hectares. Output used to be in the region of 4,000 tonnes; now it is in excess of 150,000 tonnes. In 2001 our exports were just over 1000 tonnes compared with 9,000 tonnes in 2007 (worth about 60 million Dinars or 34 million euros). I think these are the figures that testify most eloquently to the growth of organic agriculture in Tunisia.

Q. - What lessons do you draw from Tunisia's experience, particularly in the field of education?

The Tunisian example was quite remarkable in that efforts to promote organic agriculture focused on all aspects of the operation: extension work, education, research, training, and others. We have sought to train farmers and engineering students alike by instituting university-level courses, and since the year 2000, all graduating agricultural engineers have received training in organic agriculture as a matter of course (in other words they have completed the organic agriculture module). Moreover, training for farmers and for the regional organic agriculture network (represented by a member of the Ministry of Agriculture, a member of the Tunisian Agriculture and Fisheries Union, and a member of the Agricultural Vocational Training Centre, all at regional level) is being provided through the Technical Centre of Organic Agriculture, which works in close collaboration with CIHEAM, and more precisely with its Institute in Bari (Italy). We have also been training teachers for the professional training centres and they will give courses in organic agriculture to extension workers and anybody else who wants them. We are thus laying the foundations for the regional centres that will represent us at regional level

In addition, we have set up the first school of organic agriculture for peasant farmers. This initiative represents a world breakthrough in adapting the peasant farmers' integrated management approach to the needs of organic agriculture. One of the challenges lay in developing the requisite technical knowledge in the absence of any scientific prescriptions for managing organic agriculture in the arid zones of the Mediterranean region. This agricultural school was established at the initiative of the Ministry's General Directorate for Agricultural Production in collaboration with the FAO (as part of a technical cooperation project implemented in late 2003). This particular experience made us realise that the establishment of the school for peasant farmers and the introduction of a participatory approach to field research and extension work have been highly effective catalysts in the development of organic agriculture in Tunisia and entirely appropriate to our task. Today we are attempting to implement this approach nationwide through a national project to establish a network of organic agricultural schools for peasant farmers and to devise a national extension plan employing this approach in different ecosystems. When we began only 25 farmers had been trained on this farm over two years and only five hectares were allocated to organic agriculture in the whole of this governorate. Today the amount of land given over to organic production in the region is in excess of 1,900 hectares.

MAI Montpellier

Over the past few years MAI Montpellier has been working on the construction of a new viticulture observatory in partnership with the national agency Viniflhor.

This observatory, which went online in October 2008 on the Viniflhor website (www.viniflhor.fr), gives visitors access to more than 900 documents on vineyards (surface areas, wine varieties), changes undergone (grubbing, restructuring) and output (harvests by wine type and colour, cooperative or individual winery).

Viniflhor charged MAI Montpellier to design and produce this tool.

We have found it to be a truly excellent training method. Other schools for peasant farmers have subsequently grown up across the Mediterranean as a result of efforts by the FAO, which took the Tunisian peasant farmer's school as its model.

Q. - What is the situation regarding training to overcome problems in the field of certification?

In Tunisia, we have very clear regulations on monitoring and certification: every operator who wants to certify an organic product in Tunisia must comply with the stipulations of the regulatory texts (Law No 30 of 5 April 1999 on organic agriculture; Decree No 2000-409 of 14 February 2000 on conditions governing accreditation of inspection and certification agencies, and inspection and certification procedures in organic agriculture). I would highlight the fact that four foreign monitoring and certification agencies have so far been given authorisation to practice in Tunisia: one in 2001 and the other three in 2003. These four agencies have European-wide accreditation and certify our operators in the European, Japanese, American and of course local markets. It follows, given that they are recognised in our target markets, that we have been able to avoid many of the problems associated with the export of goods. We are pleased to see that in our own country these agencies use specially trained Tunisian inspectors and executives, which means that the current cost of certification if we subtract the Tunisian government subsidy - 70% of the cost of certification over 5 years – is not particularly high. There has therefore been significant development in this line of activity with no major problems outside the country.

I would also point out that the new European regulations on organic products may currently be applied to agencies that are working in third countries and are officially recognised by the European Union, which can only facilitate export procedures even more. Moreover our application to the EU to be recognised as a third country exporter of organic goods has reached a very advanced stage of consideration.

Q. - Most southern Mediterranean countries have now moved into organic agriculture. How does Tunisia regard the future of the sector in the Mediterranean Region?

It is very simple: we have a strategy devised for 2011, which we are now updating for 2016, and it is very clear on five points. First of all we are seeking to diversify our production. The real breakthrough is in plant production: until now our flagship products have been olive oil, dates, and aromatic and medicinal plants but under our new strategy we will be concentrating more on cereals, orchard crops, market garden crops and forestry products. We are also developing the animal production side, beginning with projects to produce organic honey, cows' milk and various other products, most of which involve small-scale operations (rearing of hens, rabbits, etc.). We have a definite strategy on product processing, which in essence requires the work to be done on the farms themselves, given that they are small and widely separated. Moreover, these measures will mean higher returns and therefore higher incomes for farmers.

The fourth point has to do with developing the local market as well as the international one. We believe that the local market is very important because it provides us with the means for testing consumers, packaging, distribution circuits and quality. It must be borne in mind that the local market offers an important guarantee to all our farmers and to all Tunisians. The Tunisian consumer is showing more and more interest in organic products and we are seeing a distinct increase in demand. As to the international market, we hope our olive oil, dates and any other products we are currently exporting will maintain their position. But we would also like to gain market share in other areas and if possible penetrate other markets. The fifth point, quite as important as the others, concerns structural matters: we need to improve our organisation so that we have an agricultural and food processing set-up that is capable of satisfying this twofold consumer/market demand more adequately and of meeting all the various requirements, including those associated with traceability and codification of products. We are embarking upon this grand programme in order to achieve our goal of gaining 370,000 hectares by 2011.

Interview by Hassane Tlili

Journalist specialising in agricultural and environmental issues

Interview

Irfan Tarelli

- *Director General, Resource Management and Support Services at the Albanian Ministry of Agriculture*
- *Member of MOAN Steering Committee*

Q. - Which of Albania's organic products have been able to make an impact on the domestic and foreign markets? What are the reasons for this?

Organic agriculture in Albania can still be considered as a new movement. In 2007, the number of organic farmers is around 100 and certified area is about 3,500 ha, including the wild collection. The organic products of cultivated plants have been diversified over the years reflecting in some extend demand of domestic and foreign markets. Main organic products are medicinal and aromatic plants, wild mushrooms, chestnuts, fresh herbs and spices, vegetables in green houses and open fields, fruits and grapes, olive oil, raki (alcoholic drink produced by grapes or plums) and vines.

The exports of organic products are dominated by wild collection stuff, fresh herbs and spices and olive oil. Since last two years some fresh vegetables like tomatoes, cucumbers, papers, lettuces and cabbages are entering to the markets of EU countries and Switzerland as well. In terms of value, the export of organic products is reaching about three million Euros per year, while the major part belongs to medicinal and aromatic plants. Taking into consideration that export volumes of agricultural products are nowadays limited, this value of organic products seems to be quite important.

Looking from farmer's perspective the export of organic products can bring about better prices and at least, for the time being, they feel safer for selling their products having a contract with buyers.
Actually, there is a demand for bio-products especially in foreign markets and this trend is increasing also in local ones. The conversion into organic is relatively easier in our "low input agriculture", which is widely practised in different areas of the country. Albania has a very rich flora and wild collection products, which after certification can be easily market as "bio". Still, the cheap labour force in rural areas is a comparative advantage

Q. Could you give an assessment of the work done by foreign extension workers in the past few years to help Albanian producers develop organic agriculture in the country?

During the first years of the organic movement in Albania, different experts from the West European countries through small projects financed by foreign donors, provided useful information on organic farming principles, methods of production, regulations, marketing aspects etc using the training of trainers approach. Meanwhile, special attention was paid in establishing some pilot farms for the demonstration of organic practices and techniques of farm management, supporting farmers to reach markets and awareness campaigns both for farmers and consumers. In this respect, an important contribution is given by SASA project (Sustainable Agriculture Support in Albania), which is implemented by FiBL and financed by Swiss government. This project is working with mainly with two local partners namely 'BioAdria" - a research, extension and marketing network and "AlbInspekt"- a body for inspection and certification of organic products.

The foreign extension experts have trained local experts and organic farmers especially vegetable and fruit producers, not only for technological aspects but also for marketing of their products. A great input to help Albanian producers to develop organic farming was given by PAB - an integrated project for extension and technical assistance in application of organic production methods, which was part of INTERREG Program, Italy-Albania. This project was implemented by IAM-Bari in close cooperation with local partners including the Ministry of Agriculture, Food and Consumer Protection (MAFCP), the Agriculture University of Tirana, NGOs dealing with organic agriculture, etc. By this project, among others, the Italian experts have:

- provided technical assistance for testing and implementation of organic production methods mainly in vegetables, grapes and olive in farms. Their findings have guide the farmers how to better control key pests and diseases and how to ménage and improve soil fertility;
- trained local extension workers (public and private) and contributed to enhance the technical capacities of extension services on organic agriculture;
- worked to establish a research network between both countries for knowledge and information sharing and a lot of publication and extension materials were prepared and distributed.

MAI Bari

Over the period 2006-2010 the Inistitute is taking part in the European research project "SCENES" (FP6-SUSTDEV)

This aim of this project, which involves 24 research institutions, is to draw up and examine a series of contrasting scenarios for water resources in the Euro-Mediteranean zone.

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On the premises of MAFCP, a national competence centre for organic agriculture has been created and it coordinates all the activities implemented nationwide in this sector. The agricultural experts and farmers have access to a library, which has more than 400 books, various periodical magazines and on-line information as well. The Italian experts initiated preparing of a Newsletter on organic agriculture, which now is released periodically by public extension service. Special efforts were done for the marketing of organic products not only through training activities but also by organizing "the open day markets" and facilitating the participation of our local producers in various fears and exhibitions in Italy.

Lastly, the project helped MAFCP to prepare an Action Plan for the development of organic agriculture in Albania. One of the priority areas is about supporting organic research, education, training and extension in order to develop and consolidate a national organic knowledge system. Further on, a proposal for organizing a specialised service for the management and development of organic agriculture was adopted. The scope of work for extension services in organic agriculture and relevant instruments were well designed and this system is smoothly functioning.

Q. In your opinion, what other European and the Mediterranean experience in this area might provide Albania with the inspiration it needs to ensure that organic farming has a promising future in the country's agricultural sector?

Organic farmers in Albania are very small producers and on average own 1-2 ha of land. The marketing of their products is still not very well organised and for most of such producers it is not easy to reach foreign markets. Meanwhile, the country has a great potential for different types of tourism all over the year. The development of this sector is the main priority of national economy and recently number of tourists, local and foreigner is rapidly increasing. This is a strong signal that demand for food of good quality will be higher.

Based on this fact, any experience that harmonises both the local offer and demand for organic products would be very appropriate. Without ignoring export possibilities, the selling of products to domestic market will make the organic sector more sustainable.

In my opinion, the experience on organic farming of Apulia Region (Italy) might be very relevant for us, as far as many other similarities do exist. Anyhow, the provision of direct support for organic farmers is still remaining an issue, which should be addressed by the governmental agencies.

Interview by Hassane Tlili, in link with MAI Bari

Journalist specialising in agricultural and environmental issues

Interview

Enver Isufi

- *Executive Director of the BioAdria Association, Albania*

Q. In your opinion which organic products are not properly exploited in Albania and what operators require if they are to establish a genuine niche market in the next few years?

With about 76% of its territory being hills and mountains and thanks to a reduced use of chemical agricultural inputs over the past decades, Albania has an important potential for organic agriculture as well as for natural and typical products. Concerning organics, the products with good market prospects are the following: olive oil, medicinal plants, fresh herbs, vegetables, sheep and goat cheese, chestnuts, honey, early potatoes.

Q. Could you give two examples of the way in which organic agriculture has made a serious contribution to the fight against poverty and rural urban drift in Albania?

It difficult to say which crops have had a decisive influence on Albanian farmers and their incomes. The number of organic farmers is still quite low in Albania, therefore only few farmers can benefit from opportunities offered by organic agriculture. However there are some success stories concerning for example producers that export olive oil and fresh herbs and are so far very satisfied with their business performances.

Q. What are the main difficulties facing Albanian farmers who wish to develop organic agriculture?

Between the field and the shop - that is between the production to the market phase - there a big river to cross for organic products. Connecting these two fundamental steps is crucial for the development of the sector, the main components of the needed bridge being technical and financial support to 1.Production; 2.Certification and 3.Marketing.

Let me share with you some ideas on the critical issues of organic agriculture in Albania and on possible ways to improve the current situation.

Concerning production and certification, the main difficulties are:

- the small size of organic farms (on average 1,3 ha/farm)
- the still modest number of organic producers
- poor cooperation between organic farmers
- weak extension services in organic agriculture
- limited supply of inputs for organic agriculture (like plant protection products, fertilizers,
- resistant seeds and seedlings)
- high cost of certification services.

A number of actions can be taken to tackle such problems. First of all, farmers should be pushed to work together and conversion of bigger farms (with at least 3 ha and more) need be encouraged. Appropriate support should be given to both existing NGOs committed to the development of organic agriculture and new associations working in different regions of the country on various crops and organic husbandry as well. Also, organic cooperatives should be supported through the provision of the needed infrastructure and of extension and marketing assistance. With specific reference to extension, the number of extensionists adequately trained in organic agriculture and with a certified knowledge of the field should be increased and on-farm research should be carried out at the district level.

BioAdria Association is particularly active in this field. The Association was established in 2005 with the support of SASA project and since then has been focusing on extension and on farm research in organic agriculture; more recently it started dealing with market development issues as well. Most of Albanian organic producers are members of BioAdria (about 100 farmers). Specifically in the domain of training BioAdria Association is working in close cooperation with the Ministry of Agriculture. It has been charged to carry out the training of public extension services in organic agriculture through the ToT (Training of Trainers) approach.

Albanian organic farmers would also benefit from the provision of some financial support to cover at least part of the input costs. In 2008, for the first time, financial support was introduced by the Government to partially cover only organic certification costs at the farm level. Support for further development of human capital and professional skills of private certification service providers would be also useful for the development of the sector.

An encouraging sign for the future of organic agriculture in Albania is the fact that a lot of farmers have recently developed an interest in conversion to organics. Many of them have called in these months BioAdria Association to make an appointment and discuss a conversion plan. A number of reasons may be behind such a decision: the setting up of an extension service network by BioAdria; the diffusion of information materials on organic agriculture produced and circulated by BioAdria and the Government; as mentioned above, the recent introduction of some financial support by the Government for the sector: in order to have access to such support farmers need to be registered as organic or in-conversion farmers.

In Albania organic operators are also facing a number of problems in the marketing of their products. Among those it may be worth mentioning:

- limited diffusion and poor development of market outlets for organic products
- low consumer awareness
- lack of adequate market infrastructure (e.g. wholesale market, storage and cooling structures) affecting the continuity and the quality of supply and jeopardising export opportunities
- generalised poor compliance with food safety standards in conventional agriculture threatening the good reputation of high quality organic products
- lack of market research

In market development field too, there is large scope for government and donors' support.
On the domestic market specific consumer groups could be targeted, for instance the foreign community living in Tirana and customers of four- and five-star hotels. Local consumers' awareness could be also effectively raised through a number of educational and promotional initiatives in supermarkets, restaurants, fairs, schools, nurseries.

Action for the development of traditional outlets – such as specialised shops, organic corners in supermarket - and more innovative ones like box schemes, need to be taken. Tax relief could be even considered for organic shops which also face serious problems in logistics of transporting the organic products from the producer to the consumer.

Enforcement of food safety standards and legislation is another important field of action. On one hand, the low quality of conventional products can push an increasing number of consumers to prefer high quality organic products. At the same time, on the other hand the bad reputation of conventional agricultural products can spoil the image of organic products.

A couple of concluding comments about the stakeholder involvement and future prospects… A collective brainstorming is needed to produce a full picture of the organic sector in Albania, prioritise actions to undertake and create a system in which all concerned stakeholders are included, have a role to play and responsibilities to take on.

For a small country like Albania, organic agriculture is not simply a production alternative. Organic agriculture is rather an alternative for survival. Albania has limited possibilities to develop intensive conventional agriculture and compete on the global markets. Albania has more chances to compete relying on local varieties and typical products and selling its sun, clean water and tasty food.

Interview by Hassane Tlili, in link with MAI Bari

Journalist specialising in agricultural and environmental issues

Close-up on the MOAN network

The Mediterranean Organic Agriculture Network (MOAN) is an institutional network implemented by the Mediterranean Agronomic Institute of Bari (MAIB) Italy, forming part of the CIHEAM that plans to involve the Ministries of Agriculture of 24 Euro-Mediterranean countries: Albania, Algeria, Bosnia and Herzegovina, Croatia, Cyprus, Egypt, France, Greece, Italy, Jordan , Lebanon, Libya, Macedonia (FYR), Malta, Montenegro, Morocco, Palestinian Authority, Portugal, Serbia, Slovenia, Spain, Syria, Tunisia and Turkey. Membership of Cyprus, Greece and Portugal is being finalised.

Since 1997, MAIB has endeavoured to become a landmark for the Organic Agriculture sector by providing training, research and experimentation and promoting networking to co-operate in the development of agriculture in the Mediterranean Basin.

The MOAN is a tool for decision makers to exchange information and good practices related to organic agriculture, to share common strategies for its further development in the Mediterranean area and to valorise its potential and identity in the global debate.

MOAN

The next annual MOAN meeting will be held in Madrid, Spain in April 2009 on the topic "*Promoting the Mediterranean Identity of organic products in national and international contexts*"

History and evolution

- MOAN Foundation (1999): MAIB launched a network of experts on Mediterranean Organic Agriculture with the objective of furthering organic agriculture in the Mediterranean countries through the activities of promotion, training, research and data collection on the state-of-the-art of organic agriculture in the Mediterranean Basin. It gathered representatives from universities, research institutes, and Ministries of Agriculture from 11 member countries of CIHEAM.

- MOAN new organisation (2006): MOAN became an institutional network and was enlarged to gather 24 Euro-Mediterranean countries. Country representatives are decision makers of the Ministries of Agriculture dealing with organic agriculture issues. This new organization followed the Euro-Med conference on agriculture (Venice 2003) that recommended organic agriculture to be regarded as a main factor of economic development for the countries of this region and a potential tool for strengthening the Euro-Mediterranean partnership.

Objectives

- Creating working partnerships to share and solve common problems and work together on common strategies for the development of organic agriculture in the Mediterranean.
- Encouraging exchange and cooperation among ministries and institutions concerned with organic agriculture in the Mediterranean as well as among national organic networks and communities.
- Popularising the rationale of organic agriculture and its multifaceted impacts in the Mediterranean.

Priority areas

- International promotion of Mediterranean organic agriculture
- Organic statistics collection and dissemination
- Regulatory and Policy framework development
- Institutional Capacity Building
- Training and research in organic agriculture

Activities

- Organisation of a thematic annual meeting in one of the network member countries;
- Support for the creation of national sub-networks;
- Organisation of country-specific workshops and international conferences;
- Publication of scientific works and periodical reports on the state-of-the-art of organic agriculture in the region;
- Creation and management of a website with special sections on country profiles and events.

http://moan.iamb.it

News in brief

EC sets up Regional Advisory Council for Mediterranean fisheries

On 29 August 2008, the European Commission declared operational the Regional Advisory Council for Mediterranean Sea under the European Union's common fisheries policy. This decision came during an extension of the multilateral talks conducted in June 2008, when the Commission had ordered a halt to tuna fishing in the Mediterranean long before the planned deadline, arousing anger among sea fishermen in the region and prompting strong reactions from EU Mediterranean countries. The latter had met in Venice on 17 June 2008 to work out a common response to Brussels' demands and since then spokesmen for the fisheries sector and other interested groups had requested the setting up of a regional advisory council comprising representatives from Greece, Spain, Italy, France, Cyprus, Malta and Slovenia. The recent decision by the Commission is intended to meet this request: the Advisory Council will be operational as of 15 September 2008 and will be based in Rome.

The Italian Minister of Agriculture, Mr Luca Zaia, has been quick to express his country's satisfaction at being chosen to host the new council, which will increase the importance of Italy as a platform for coordination and cooperation in Mediterranean fisheries. The city of Rome is already home to the General Fisheries Commission for the Mediterranean (GFCM), which was set up in 1952 under the auspices of the FAO and now comprises representatives from 23 countries (including Japan) along with the European Commission.

Healthy eating the Mediterranean way

Nutrition researchers and specialists in Florence have just completed a study demonstrating the clear benefits to human health of a regular diet based on the flagship food items of the Mediterranean Region. Francesco Sofi, Francesca Cesari, Rosanna Abbate, Gianfranco Gensini and Alessandro Casini recently published their findings in the prestigious "British Medical Journal". The most important points echo the findings of the many previous research programmes on the effects of the Mediterranean diet on individual health. Indeed, the authors of this new study, having analysed the eating habits of nearly one and a half million people, clearly demonstrate that the closer the individual's diet is to the Mediterranean model, the better his health will be. More specifically, it transpires that, among those who follow the Mediterranean diet on an almost daily basis, the incidence of mortality and illness is significantly reduced (mortality by 9%, Alzheimer's and Parkinson's by 13%, cardio-vascular disease by 9%, and cancer by 6%).

These new analyses should stimulate renewed interest among scientists and health professionals in the increasingly vaunted benefits of the Mediterranean diet. It is mainly composed of items such as fruit, vegetables, olive oil and fish and contains little in the way of meat, cheese or their derivatives. Needless to say the benefits are greater if the diet is combined with regular physical activity. Nutrition and exercise are therefore aspects of the wider issue of public health, in the developed and also in the emerging countries, where the consumption model has also been steadily shifting towards one rich in meat and fat. The populations of the Mediterranean region, those of the North as well as those of the South, are all following the same path, turning away from the Mediterranean diet and its most important items - often more demanding of time and effort - as life becomes urbanised and life styles change. In a region already facing so many problems, a trend that increases the risk to health, with the higher social and economic costs that entails, can only have adverse effects on the development process.

AFD/CIHEAM

The AFD (French Development Agency) and the General Secretariat of CIHEAM have formed a partnership with a view to conducting a study on "agricultural outlook and policies in North Africa" (for publication in the summer of 2009) and organising an expert workshop in May 2009.

MAI Montpellier has been mobilised to draw up four strategic notes on (i) the rise in food prices and the liberalisation of trade, (ii) agricultural development models for North Africa, (iii) the agricultural players of tomorrow, and (iv) the lessons to be drawn from the experience of particular local areas.

The aim of the study is to analyse the sustainability of the agricultural models of the North African countries (Maghreb and Egypt) in a context of great economic, social and environmental uncertainty.

For CIHEAM, the study provides an opportunity to forge a new partnership with a major French economic and institutional operator and to promote its expertise in the area under consideration.

Egypt's cereals issues

Egypt, one of the world's biggest cereal importers, is seeking to diversify its supply to help satisfy the increasing demands of its population and cope with the rise in the price of basic agricultural products. This explanation was recently given by Amin Abaza, the Egyptian Minister of Agriculture and Land Reclamation in interviews with the Egyptian press. He said that discussions with Kazakhstan, Uganda and Sudan on this matter had been very fruitful and that Egypt was arranging to buy one million tonnes of Kazakh wheat. The scale of the transaction has not been made public, but well-informed sources say that the new agreement, negotiated with the Kazakh President in person, would make Kazakhstan one of Egypt's regular suppliers

As to the approaches by Egypt to the Ugandan authorities, Amin Abaza said in an interview with the daily "Al Ahram" that Uganda had agreed to rent Egypt two million feddans (about 800,000 hectares) to grow wheat and maize. The Minister explained that seven major Egyptian private-sector groups that specialised in the agricultural sector were available to conduct trials in Uganda without delay in order to identify the varieties of wheat and maize that could best be grown there. A mixed delegation representing the Egyptian government and private sector would accordingly be going to Uganda in October to finalise the agreement. In an interview with the Egyptian daily, "le Progrès", Amin Abaza said that similar, albeit less ambitious trials had been carried out in the eighties and that the results had been deemed excellent. There had been just one problem: the high cost of transporting products grown in Uganda to Egypt. On the question of cooperating with Sudan on programmes that would help satisfy the food requirements of the Egyptian population, the Minister pointed out that in April his country had asked the Sudanese authorities to consider ways in which the two countries might collaborate on wheat farming. Talks on this matter had led to an agreement in principle, under which an area of 800,000 hectares at the border between the two countries would be used for that purpose.

The Egyptian government was also giving careful consideration to the idea, shared by several private Arab investment groups with a special interest in agriculture, of setting up a consortium for the purpose of growing cereals in Sudan, particularly hard and soft wheat. This type of project was beginning to arouse considerable interest among investors in Egypt and the Gulf States. Lastly it should be pointed out that, in addition to the amount received under the recent agreement with Kazakhstan, Egypt has imported about 1.5 million tonnes of wheat since July 2008. Between July 2007 and July 2008, Egypt's wheat imports amounted to 6.5 million tonnes, most of which were from Russia, the United States and Kazakhstan.

Impact of climate change on the Mediterranean agricultural sectors

The European Environment Agency (EEA), in collaboration with the World Health Organisation, recently published an important report on the repercussions of climate change for the environment and for human activity in Europe. The EEA report, "Impacts of Europe's changing climate", sets out to identify the sectors and regions most sensitive to climate variation using a series of indicators. The most serious present and future consequences are a greater risk of flooding and drought and a loss of biodiversity, all of which pose a threat to different economic sectors (such as energy production, transport, forestry, agriculture and tourism). The Mediterranean region is particularly vulnerable to these threats.

The report draws particular attention to the effect of global warming on key economic sectors such as agriculture and highlights the renewed concern over the future of the agricultural sector. The northern shore of the Mediterranean is having to cope with a number of adverse trends (fall in annual rainfall levels, growing desertification, rising demand for water, animal diseases, more frequent forest fires, and increasing fluctuation in agricultural yields), all of which have serious economic consequences, which manifest themselves in significant losses of farms, livestock and woodland. The major challenge therefore consists in devising ways of adapting agricultural and land management to climate change while at the same time preserving the environment

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Publications

OECD-FAO, *"Agricultural Outlook 2008-2017"*, fourteenth edition, OECD-FAO Joint Report, Paris (France), September 2008.

Joachim von Braun, Josette Sheeran and Namanga Ngongi, *"Responding to the Global Food Crisis: Three Perspectives"*, IFPRI 2007-2008 Annual Report, Washington (USA), September 2008.

Jaime Lamo de Espinosa and Pedro Urbano Terrón, *"Repercursiones del cambio climático en la agricultura y la alimentación mundial"*, Ed. Eumedia S.A., Madrid (Spain), 2008.

European Commission, *"High prices on agricultural commodity markets: situation and prospects",* Working Document, DG Agriculture and Rural Development, Brussels (Belgium), July 2008.

Population Reference Bureau, *"2008 World population data sheet"*, PRB Annual report, Washington (USA), august2008

Indermit, Gill (eds), *"Reshaping Economic Geography",* World Development Report 2009, World Bank, Washington (USA), November 2008.

Barah Mikaïl, *"L'eau, source de menaces ?"*, IRIS-Dalloz, Paris (France), June 2008.

European Environment Agency, *"Impacts of Europe's changing climate. 2008 indicator-based assessment",* EEA report, Copenhagen (Denmark), September 2008.

Najib Akesbi, Driss Benatya and Noureddine El Aoufi, *"L'agriculture marocaine à l'épreuve de la liberalisation »,* Economie critique, Rabat (Maroc), 2008.

FAO, *"Biofuels prospects, risks and opportunities"*, The State of Food and Agriculture 2008, FAO report, Roma (Italy), October 2008.

Asit K. Biswas, Eglal Rached and Cecilia Tortajada, *"Water as a human right for the Middle East and North Africa",* Routledge/IDRC, Ottawa (Canada), 2008.

Events

3-4 December 2008 – Paris (France)
15th "Rencontres Recherches, Ruminants" event (3R 2008), a scientific congress organised by INRA and the Institut de l'élevage *(information).*

15-16 December 2008 – Brussels (Belgium)
Conference "School Fruit: a healthy start for our children - Promoting School Fruit Schemes in the European Union" organised by the European Commission *(information)*

14-18 January 2009 – Casablanca (Morocco)
International Water and Sanitation Exhibition, jointly organised the Maghreb Machrek Alliance for Water and UNESCO *(information)*

14-16 May 2009 – Berlin (Germany)
3rd International Symposium "Crop Plant Resistance to Biotic and Abiotic Factors" jointly organised by the German Phytomedical Society and the British Crop Production Council *(information).*

22-28 June 2009 – Cagliari (Italy)
International Congress "Biodiversity hotspots in the Mediterranean area" organised by the Centre for the conservation of biodiversity in the Mediterranean *(information).*

ARIMNet

ARIM-Net, a project funded by EC DG Research as part of the 7th FPRTD, was officially launched on 4 and 5 November in Montpellier, in the presence of Ms M. Guillou, President of INRA, Mr T. Hall, Director of Agriculture, Fisheries and Biotechnologies at EC DG Research, Mr A. Mougou and Mr B. Hervieu, CIHEAM President and Secretary General respectively, and many other officials with responsibility for agricultural research in the Mediterranean Region.

Given the serious problems of fragmentation and inefficiency besetting national agricultural research sectors in the region, the strategic importance of this project and the opportunity it presented was firmly underlined by all speakers. This rather untypical ERA-Net brings a regional component to a multidisciplinary enterprise: agricultural research.

The committees responsible for managing and steering the project, which is programmed to last four years, were also present at this meeting, where the foundations for its first stage were laid. This stage is of crucial importance as it consists in mapping research programmes that are liable to involve crossborder cooperation.

CIHEAM Mediterranean Observatory

Recent publications

CIHEAM Analytical Notes

- *Current events in Mediterranean agriculture (May-July 2008)*, Ciheam (collective), No 36, July 2008.
- *Pastoral livestock breeding in the high plateaux of Eastern Morocco*, Grigori Lazarev, No 37, August 2008.
- *Liberalisation, inflation and standards of living in Morocco*, Hicham Attouch, No 38, September 2008.
- *Statistical analysis of forest fires in Algeria*, Ouahiba Meddour-Sahar, Rachid Meddour and Arezki Derridj, No 39, September 2008
- *Failure in WTO negotiations: consequences for the Mediterranean countries*, Michel Petit, No 40, October 2008.
- *Current events in Mediterranean agriculture (September-October 2008),* Ciheam (collective), No 41, November 2008

CIHEAM Briefing Notes

- *Agricultural trade between the EU and its Mediterranean partners (2004-2006),* Sébastien Abis, No 50, September 2008.
- *5th International Conference on Land Degradation Conclusions and Recommendations*, Pandi Zdruli, No 51, October 2008
- *Economic and commercial overview of the Mediterranean Arab countries*, Ciheam (collective), No 52, November 2008.

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- Summary of the 03/2008 edition of the review, September 2008.

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- Watch Letter No 6, "Forest fires in the Mediterranean Region", Summer 2008.

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The Watch Letter

Every quarter CIHEAM issues its Watch Letter in English and French.

The next issue will be published in March 2009 and will address agribusiness in the Mediterranean Region.

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