

MED-Amin

Réseau méditerranéen d'information sur les marchés agricoles
Mediterranean Agricultural Market Information Network

Drought Set to Persist

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Edito

En 2024, **MED-Amin a 10 ans**. Les dernières années ont connu successivement la pandémie Covid-19, la flambée des prix des intrants agricoles, le conflit en Ukraine entraînant des tensions géopolitiques et commerciales exacerbées. Dans ce contexte des plus sensibles, notamment pour les pays subissant déjà les conséquences des changements climatiques avec des événements météorologiques violents et parfois à répétition comme la sécheresse qui sévit encore sur une bonne partie de l'ouest du bassin méditerranéen, le réseau MED-Amin a su porter une **voix méditerranéenne**. Il a su rassembler les acteurs de la région, poursuivre la construction progressive d'outils d'alerte précoce pour mieux anticiper les crises et y faire face lorsqu'elles surgissent ou deviennent chroniques.

Le réseau, avec le travail remarquable de ses Points focaux nationaux et des organisations partenaires associées, est parvenu, progressivement, à consolider les acquis dans cette période de turbulence, et à **renforcer le dialogue et la confiance, les dispositifs d'aide à la décision et de suivi**. Le contexte international a bien changé en quelques années, passé d'une période relativement calme, avec une tendance baissière des cours internationaux, à une période chargée d'incertitude, où l'agriculture et

l'alimentation sont brandies tantôt en totem de justice sociale, tantôt en arme commerciale et géopolitique. Le travail réalisé depuis plus de dix ans par MED-Amin est d'autant plus primordial que les crises duquel le système d'information devait prémunir les pays méditerranéens sont là et multiples. Face à ces défis, la Méditerranée apparaît jour après jour comme **une région-test pour le Monde**.

En 2024, MED-Amin s'attachera à développer une plateforme ou un **tableau de bord** présentant en temps réel la situation de la sécurité alimentaire dans les pays de la région pour orienter des décisions opérationnelles; en lien avec AMIS, le SMIAR, le Conseil international des céréales, la Direction internationale de l'agriculture de la Commission européenne et son Centre commun de recherche.

La collaboration avec le Centre commun de recherche (CCR) se poursuivra aussi, en 2024, par l'évaluation de la faisabilité d'un système de **prévision quantitative** des rendements pour la zone méditerranéenne.

Sans ces **partenariats**, le réseau ne

serait pas ce qu'il est aujourd'hui. MED-Amin a d'ailleurs fait du développement des synergies un objectif à part entière.

La prochaine **réunion annuelle du réseau les 29 et 30 mai 2024** à Tirana, Albanie, sera aussi l'occasion de lancer officiellement le nouveau Plan d'action MED-Amin 2024-2026. A la suite du succès de la 1ère réunion stratégique de MED-Amin, à Paris en novembre dernier, la prochaine réunion ministérielle du CIHEAM prévue en octobre 2024 au Maroc devrait être l'occasion de donner un **nouvel élan politique** au réseau, et de

l'inscrire dans la durée, à l'instar de ce qu'a réussi à faire AMIS dans le cadre du G20.

C'est un honneur que d'avoir pu contribuer, pendant ces six années, au développement significatif de l'initiative, en tant que coordinateur des activités du Secrétariat. Je quitterai ces fonctions pour d'autres projets professionnels à partir d'avril 2024 et remercie tous les éléments constitutifs de ce réseau de coopération internationale.

David Gasc

ALGERIE

Céréales russes

(Al-Monitor, 06/02 ; Agence Ecofin, 15/02)

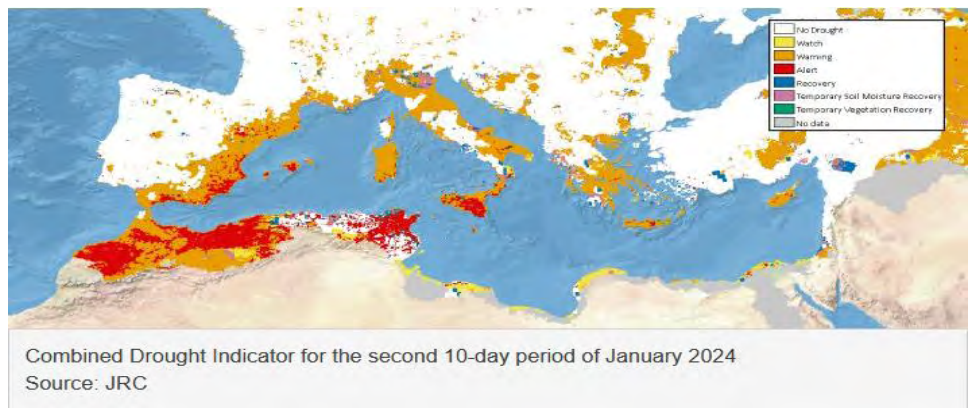
La Russie est devenu le premier fournisseur de blé de l'Algérie sur les 6 premiers mois de la campagne de commercialisation de 2023/2024 devant les pays de l'UE, notamment la France, son fournisseur historique. L'Algérie importe plus de 70% de ses besoins de consommation et devrait augmenter ses achats de blé sur le marché international de 7,4 % à 8,7 Mt en 2023/2024, afin de combler son déficit de production de 2023, selon les dernières prévisions de l'USDA.

TURKIYE

Cereals imports to decline

(World Grain, 08/02)

Abundant harvests for wheat, corn and barley in Türkiye for marketing year 2023-24 are expected to lower import demand for these grains while wheat exports could reach a record, according to the Foreign Agricultural Service (FAS) of the US Department of Agriculture. In its Feb. 1 Global Agricultural Information Network (GAIN) report, the FAS said favorable weather conditions during much of the growing season bumped up production. Wheat is projected at 19.5 Mt, corn at 8.4 Mt and barley at 8 Mt. If realized, the barley crop would be the second largest ever. The wheat import forecast by the FAS was held steady at 10 Mt, assuming the private sector will continue purchasing wheat from abroad, down from 12 Mt in 2022-23. "The pace of (wheat) imports is expected to hold steady during the second half of the year," the FAS said. "However, with a sizeable amount of imported wheat being processed and re-exported as flour and pasta through the Suez Canal, there is a chance that import demand could slip if the current situation in the Red Sea persists."



Prolonged drought and record temperatures have critical impact in the Mediterranean

Adapted from the [article published on 20 February 2024](#) - Joint Research Centre.

Severe and prolonged drought events have affected Europe for more than two years and northern Africa for six years, causing water shortages and hampering vegetation growth, outlined the Joint Research Centre in its report [Drought in the Mediterranean – January 2024](#).

According to the [European Drought Observatory](#) (EDO), long-lasting, above-average temperatures, warm spells and poor precipitation have led to critical drought conditions, affecting numerous areas across southern Italy, southern Spain, Malta. The situation has even been more severe and prolonged in [Morocco](#), Algeria, and Tunisia. In the midst of winter, **the ongoing drought is already having critical impacts.**

As a consequence, water use restrictions are already implemented locally in Morocco, Spain, and Italy. On 1 February, drought emergency with strict water restrictions was declared in Catalonia (North-East of Spain), as water reserves fell to below 16%. Water reservoirs in Algarve (South of Portugal) were found to be at their lowest level and water use restrictions were ordered. Reservoirs in Sicily (South of Italy) are below the alert level and water rationing may be necessary to guarantee minimal services. In Sardinia (Italy), water reservoirs were estimated to hold less than 50% of their capacity in December 2023. In Morocco, six consecutive years of drought have resulted in critically a low level of water in reservoirs, with average dam filling at about 23%. Water use for cleaning roads, irrigation of parks and some farming areas has been banned.

Seasonal forecasts predict a warmer spring in southern Italy, Greece, the Mediterranean islands, and northern Africa. As the drought severity is expected to persist, **concerns rise about its impacts on agriculture, ecosystems, drinking water availability and energy production.**

The UN Intergovernmental Panel on Climate Change (IPCC) has predicted that heatwaves and droughts will become more frequent and severe in many regions in the coming decades, in particular the Mediterranean region.

The situation is thus expected to continue to impact the region, highlighting the **need for adaptation strategies to reduce the effects of the drought.** Investments in drought early warning systems, increasing the water efficiency of technologies, changing to more drought resistant crops and improving access to water resources are crucial for improving community preparedness and resilience.

However, managing droughts is complex. A **pragmatic approach to drought management** and adaptation planning requires an impact-based risk assessment, which in turn should rely on drought impact observations. To this end, the JRC and [European Drought Observatory for Resilience and Adaptation \(EDORA\)](#) partners have collaborated on the development of the first [European Drought Risk Atlas](#), aimed at assessing drought risk using innovative technologies.

Heading into the Unknown? Exploring Sustainable Drought Management in the Mediterranean Region (2024)

Martin-Candilejo, A.; Martin-Carrasco, F.J.; Iglesias, A.; Garrote, L. *Sustainability* 2024, 16, 21.

This paper outlines how drought management may be more sustainable in the Mediterranean region to face climate change. This paper highlights how policies and investments in data and monitoring could lead progress of drought management efforts. However, these crucial efforts may not be sufficient under highly likely short-term changes in climate and society.

The results generated by this research could

be useful for policymakers aiming to generate voluntary participation.

The results could be especially useful in cases where it is not possible to incentivize behavior through taxation, or in low-income regions where budgets may not provide for subsidies. Investing in water management is clearly a smart way forward for combatting drought.

This paper identifies barriers to sustainable drought management, including societal, individual, economic, technological, and natural

environment factors. This study highlights a shift from the traditional reactive approach to a more comprehensive and preventive strategy. Additionally, this paper proposes the establishment of a Technical Secretariat to centralize information, coordination, and collaboration in drought management efforts.

➔ Read the [article here](#).

Farmers' protests underscore challenges in agrifood system transformation

Feature Article of the AMIS Market Monitor, No. 116 of March 2024.

From the UK to India, from Spain to the borders of Ukraine, farmers across the world have been expressing their discontent. While the actual triggers of the protests might differ, farmers seem to be driven by **similar fears and frustrations**, with possible repercussions for global food security. The common underlying cause appears to be compensation, often perceived as inadequate by farmers, who cite the difficulties they face in covering escalating costs for inputs such as energy, fertilizers and transport. **Profitability concerns** have become more evident as most commodity prices have declined from their 2022 peaks, and shipping disruptions in the Panama Canal, the Red Sea and elsewhere alter the competitiveness of different product origins.

In early 2023, amidst historical drought and challenging economic conditions in the country, farmers in Argentina demanded lower taxes and more favourable exchange rates for their exports. In India, unrest broke out in February 2024 as farmers demanded a law guaranteeing a minimum support price for a broad range of crops to protect farmers against price fluctuations. In Europe, demonstrations took place in Belgium, France, Germany, Italy, Poland, Spain, Romania, and beyond. In Germany, the end of tax rebates on agricultural diesel contributed to the protests; in Poland, the suspension of import duties, quotas and trade defense measures for imports from Ukraine were perceived as causing unfair competition for local farmers; while in France, agricultural producers raised concerns about unnecessary bureaucracy and imports from outside the bloc that do not meet European standards of quality, health protection and environmental regulations.

Agricultural and trade policies that frame and support farmers' activities embrace multiple objectives. Over time, these policies have evolved away from focusing solely on supporting agricultural output to **encompass more and more complex objectives** such as mitigating climate change, protecting the environment, and preserving landscapes and biodiversity. Conditioning agricultural support on

progress towards these broader objectives may be perceived as jeopardizing the competitiveness of domestic producers in international markets. In addition, with agricultural policies becoming broader in their field of intervention and public budgets more constrained, controls over support programmes have intensified, resulting in more administrative requirements for farmers.

Protests underscore the challenges in agrifood system transformation, at the **nexus of food security, farmers livelihoods and climate change issues**. These protests, and how governments respond to them, could potentially have profound consequences for global food security.

The need for the agrifood sector to transform is evident. According to recent estimates of the International Panel on Climate Change, agriculture contributes about 20% to global greenhouse gas emissions and accounts for about 70% of global freshwater use. Already, climate change is believed to have caused an increased frequency, intensity and duration of heat-related events and droughts as well as heavy precipitation and floods that have each adversely impacted agricultural yields and production.

Since its inception, AMIS has advocated for well-functioning, open agricultural markets. The ongoing protests encapsulate the **overarching dilemma facing policymakers** in meeting the triple challenge of providing adequate, affordable, safe and nutritious food for a growing global population; providing livelihoods all along the food value chain; and doing so while increasing the environmental sustainability of the sector. Efforts to increase market and policy transparency need to continue across the entire agri-food system. However, this agenda requires a deep understanding of existing policies and frameworks at the national and global levels. In addition, governments should invest in targeted interventions that **support climate change adaptation and mitigation as well as the sector's transition** to more sustainable and resilient food systems while phasing out measures that hinder adjustments to production.

FAO Food Index ↗

(FAO, 07/03/2024)

The **FAO Food Price Index** stood at 117.3 points in February 2024, -0.7% vs January, as decreases in the price indices for cereals and vegetable oils slightly more than offset increases in those for sugar, meat and dairy products. The **FAO Cereal Price Index** averaged 113.8 points, -5% vs January and -22.4% vs February 2023 values. International prices of all major cereals declined month on month. Maize export prices dropped the most as expectations of large harvests in Argentina and Brazil, along with competitive prices offered by Ukraine eager to take advantage of the smooth running of the maritime trade route, weighed on the market. As regards wheat, the decline in international prices was mostly the result of lower export quotations due a strong export pace from Russia, which exerted downward pressure on prices from other origins. World prices of barley also eased. International rice prices edged down by 1.6% in February, as, aside from Indonesian purchases, fresh import demand remained broadly slow and new-crop harvests began in some suppliers.

TUNISIE

Importations massives

(AgriTunisie, 10/02)

La Tunisie s'apprête à faire face à des besoins record d'importations de céréales pour la saison 2023-2024, avec une estimation atteignant 4,7 Mt (dont 1,1 Mt de blé tendre, 1,1 Mt de blé dur, 0,8 Mt d'orge et 0,85 Mt de maïs), selon le dernier rapport du Système mondial d'information et d'alerte rapide sur l'alimentation et l'agriculture (SMIAR) de la FAO. Cette quantité représente une augmentation de 80% par rapport à l'année précédente, révélant ainsi un défi majeur pour le pays. En ce qui concerne les cours des céréales, une lueur d'espoir se profile, car ils ont enregistré une baisse depuis 2022. Les origines internationales prioritaires devraient être la France et la Russie.

Building Resilience in Food Security: Sustainable Strategies Post-COVID-19 (2024)

Haji, M.; Himpel, F. *Sustainability* 2024, 16, 995.

The outbreak of COVID-19 has posed formidable challenges to the food industry, exacerbating threats to food security worldwide. This comprehensive review systematically maps the existing literature on sustainability and resilience within the realm of food security; reviewing pertinent papers published from 2019 to 2022, specifically addressing the threats to food security in the post-pandemic landscape.

A meticulous categorization of the identified

papers is performed, focusing on elucidating the underlying causes of food insecurity, assessing their profound impacts on public health, delineating the requisite strategies and actions, and discerning the commonalities and distinctions between sustainability and resilience.

Drawing insights from the amalgamated findings, this study proposes a holistic, systematic conceptualization for integrating sustainability and resilience principles within the food sector. This structure offers

a roadmap for fortifying food security, ultimately advancing the cause of public health and well-being. It provides policymakers with actionable insights.

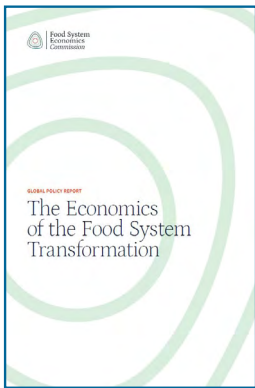
↪ See the [article here](#).



Participants in the MED-Amin Strategic Meeting in Paris

REPORT: The Economics of the Food System Transformation

Ruggeri Laderchi, C. et al., Food System Economics Commission (FSEC), Global Policy Report.



The Food System Economics Commission (FSEC) is an independent academic commission set up to equip political and economic decision-makers with tools and evidence to shift food and land-use systems towards healthy, inclusive, and environmentally sustainable futures.

The new FSEC Global Policy Report brings together world-leading experts to answer the following questions: what do Food systems cost us today? What benefits could Food systems bring? How do we make change happen?

The global food system is on an unsustainable trajectory and current policy commitments are not strong enough to divert it, equivalent to at least 5 trillion USD a year for a transformation cost estimated at 200–500 billion USD a year. Five broad priorities can guide national food system transformation strategies: Shifting consumption patterns towards healthy diets; Resetting incentives: Repurposing government support for agriculture; Resetting incentives: Targeting revenue from new taxes to support the food system transformation; Innovating to increase labor productivity and workers' livelihood opportunities, especially for poorer workers in food systems; Scaling-up safety nets to keep food affordable for the poorest.

↪ Link to the [full report here](#).

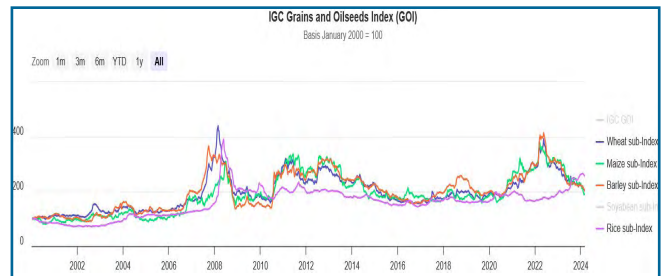
Trends on Global Markets

| | Global Price Index ¹ (Feb. 2024) | Supply & Demand in Feb. 2024 ¹ | |
|-------------|---|---|----------------------------|
| | | From previous forecast (M/M) | From previous season (Y/Y) |
| Blé/Wheat | 211 ↘ | ▼ | ▼ |
| Maïs/Maize | 195 ↘ | ▲ | ▲ |
| Riz/Rice | 262 ↘ | ↔ | ▼ |
| Orge/Barley | 211 ↘ | n/a | ▼ |

¹: Monthly average in USD, base 100=year 2000, ↗ ↘ ↔ vs last month

(▲ : Easing ; ▼ : Tightening ; ↔ : Neutral, n/a : not applicable)

Sources : AMIS Outlook - <http://www.amis-outlook.org> and [International Grains Council](#) (for the Barley) and the graph below.



Events



10th MED-Amin Annual Meeting
(Tirana, Albania)

Jointly organised by the Albanian Ministry of Agriculture and Rural Development and CIHEAM, the meeting will gather decision-makers from Mediterranean countries and relevant international organisations, as well as representatives of the grains sector to discuss the way forward for the MED-Amin initiative for food security.

↪ [More information here soon.](#)

IGC Grains Conference 2024
(London, UK)

The event will be centred on the role of global trade in the context of volatile markets and food security, providing a platform for policymakers and industry leaders to engage in key challenges in relation to climate change, protectionism, as well as trade finance. A geographical focus will assess emerging opportunities in the Eurasian grains and oilseeds sectors.

↪ [Visit the website.](#)



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