n. 50 | Mar -Jun 2024

MED-Amin

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

IGC's meeting

Phenology / Page 2

La Niña likely to return

Agrobiodiversity / Page 3

Edito

On May 29-30, 2024, the 10th MED-Amin Annual meeting took place in Tirana, Albania. On this occasion, Albania, represented by H.E. Anila Denaj, Minister of Agriculture, became the new President of the MED-Amin network and welcomed this new responsibility. H.E. underlined the importance of international collaborations to optimize resources, face climate challenges and guarantee high quality standards, and therefore the importance of networks such as MED-Amin to provide useful indicators for policies. Mrs. Frida Krifca, President of CIHEAM, commended the commitment of the network's members and partners. Mrs. Frida Krifca emphasized the network's role in sharing information and best practices and encouraged all members to continue their collaborations toward this goal.

Member countries and the Secretariat thanked Spain for its exceptional achievements in chairing the preparation of a new MED-Amin Action Plan and implementing the previous one; with developments on Early warning, increased synergies with partner institutions sharing strategic information on grain markets, and improved communication. In particular, Spain set a very insightful example in strengthening MED-Amin communication on national media, as well as through national and international events, including communication with and towards the private sector.

During the meeting, upon request of the host country, scientists from different units of the EU Joint Research Centre presented recent advances in the use of remote sensing, modelling and meteorological data for crop monitoring and yield forecasting. Member countries representatives, including Morocco, Spain and Tunisia, also updated the network on national developments. The presentations led to rich exchanges between member countries and the scientific community, with numerous opportunities for collaboration arising.

Partner organizations, including AMIS, IGC and DG-Agri of European Union, and member countries presented the latest advancements of their monitoring dashboards and observatories, which could inform a future MED-Amin Mediterranean Dashboard. New developments include data on maritime freight, fertilizer markets and wheat quality. Much information is already produced and available, but often scattered, and evolving rapidly with the development of new technologies. The challenge for MED-Amin will be to optimize synergies to consolidate data most relevant to the Mediterranean context, without major new data collection, at least in a first stage. A working group will be established to drive this effort forward, with several member countries interested to participate along with international partners.

Scientists also presented key findings from recent reports on the acute climate change situation and trends in the Mediterranean region, underlining promising solutions and messages for policy action. Philippe Drobinski, presented the latest Special Report by the Mediterranean Experts group on Climate and Environmental Change, on the climate, water, food, energy, ecosystem Nexus. Riad Balaghi presented the recent report on the drought alert system and yield forecasting in Morocco and the AAA initiative. Melek Erol, from the General Directorate of Agricultural Research and Policies in Türkiye (TAGEM) presented research efforts to produce certified seeds adapted to diverse climates.

Finally, the meeting reflected member countries' ongoing commitment, with Spain confirming its participation to funding the network activities, and Algeria and Greece announcing that they are considering hosting future annual network meetings in 2025 and 2026. MED-Amin members, President and Secretariat welcome these promising new perspectives.

Elen Lemaitre-Curri & Timothée Herviault,

MED-Amin Secretariat

MED-Amin
Mediterranean Agricultural Market Information Network

MAROC

Une faible production prévisionnelle

(agriculture.gov.ma, 25/05)

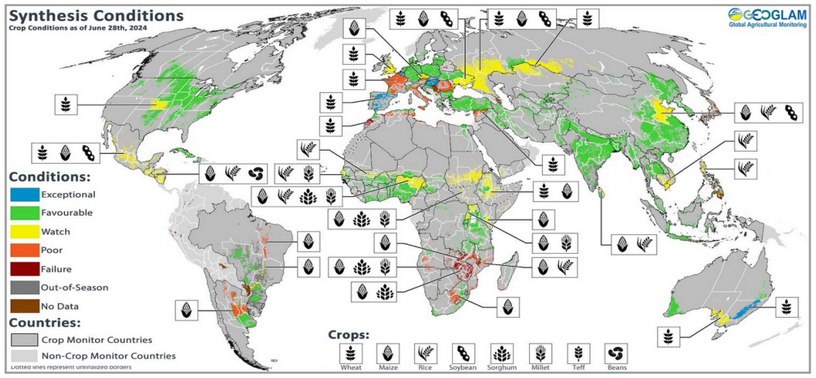
La campagne agricole 2023/24 s'inscrit dans la continuité climatique de cinq années très difficiles. Dans un communiqué, le ministère de l'agriculture marocain indique que la superficie semée en céréales principales a été de 2,47 Millions d'hectares contre 3,67 Millions en 2022/23 (-33%). La superficie récoltable est estimée à 1,85 Million d'hectares (environ 75% de la superficie semée). Avec un rendement moyen prévisionnel au niveau national de 16,9 qtx/Ha, la production des trois céréales principales est estimée à 31,2 Millions de quintaux contre 55,1 Millions en 2022/23 (-43%) : 17,5 Mqx pour le Blé tendre ; 7,1 Mqx pour le Blé dur ; 6,6 Mqx pour l'Orge. Trois régions participent à hauteur de 84% à la production nationale : Fès-Meknès (37,1%), Rabat-Salé-Kénitra (28,9%) et Tanger-Tétouan-Al Hoceima (18,2%).

EGYPT

Raise of baladi bread fourfold price

(AMIS Market Monitor No. 119, 06/06)

On 29 May, the government of Egypt announced that from 1 June it will raise the price of subsidised baladi bread fourfold, the first such increase in more than 35 years. The price of five loaves of bread will increase from EGP 0.05 (USD 0.001) to EGP 0.20 (USD 0.004) under the new arrangements, thereby covering 16 percent of the production costs. The government said the move was intended to ease the fiscal burden of the existing subsidy programme, which was allocated some EGP 125 billion (USD 2.6 billion) under the 2024-25 state budget, following steep price inflation last year.



Overview of major crop conditions as of 28 June 2024.

Meeting of the International Grains Council

Adapted from International Grains Council - Press Release - 12 June 2024.

The **60th IGC Council Session** was held in London on 10th June 2024.

World grains production was predicted to expand by a further 1% y/y, in 2024/25, to 2,312m t, as larger wheat, barley and sorghum outturns potentially contrast with a reduced maize crop. With consumption seen edging up, end-season stocks were projected to tighten, to a decade low, including a reduction in major exporters. Traded volumes in 2024/25 (Jul/Jun) were predicted to contract by 4% y/y, to 416m t.

World rice production was projected at an all-time peak in 2024/25 (+2%), with increases anticipated in leading exporters, notably in South Asia. Consumption was predicted to advance on population gains, while inventories could rise on accumulation in India. Trade was likely to edge higher in 2025 (Jan/Dec) on bigger shipments to Africa, more than compensating for a pullback in demand from Asian importers, including Indonesia.

To complement its regular market intelligence activities, the Council agreed on new multi-year projects as part of the 2024/25 work programme including:

- Mapping port connectivity and monitoring port congestion: This project will seek to augment and complement the IGC Grains and Oilseeds Maritime Shipments Dashboard;
- Rice market transparency: The Secretariat will explore ways of potentially enhancing transparency in world markets;
- Market volatility: Building on existing in-house calculations of historic volatility, work will be undertaken to develop broader, all-encompassing measures of day-to-day price swings in markets covered by the IGC. This is expected to be done in collaboration with external agencies and academic institutions;
- Trade and food security: It is proposed that exploratory analysis will be undertaken to assess the importance of trade in achieving a resilient global food system in import dependent nations. The Secretariat will look at the viability of developing a suite of trade-related indicators.

The **33rd IGC Grains Conference**, held in London on 11-12 June 2024, discussed the role of global trade in the global food system and measures, policies and initiatives that could be implemented to enhance the role of trade in food security.

La Niña likely to return with high global temperatures

Adapted from Feature Article of the AMIS Market Monitor, No. 118 of May 2024.

La Niña Forecast

After a record-setting year for global temperatures, we are approaching the end of a strong El Niño and are likely heading back into La Niña with continuing extremely high global temperatures.

The El Niño-Southern Oscillation (ENSO) is currently in the weakening El Niño phase. The National Oceanic and Atmospheric Administration Climate Prediction Center (NOAA CPC) predicts a shift back to ENSO-neutral conditions from April to June. The Australian Bureau of Meteorology has also forecasted a return to ENSO-neutral conditions. However, NOAA has issued a La Niña Watch and there is a 60 percent chance that La Niña may develop as early as June to August. The likelihood of La Niña increases to 80 percent chance or more, to begin during the August to October period. Although early forecasts are less accurate, several indicators suggest that La Niña is approaching.

Precipitation Changes Coupled with High Temperatures

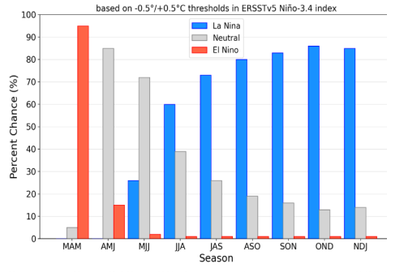
Should La Niña materialize, drier-than-average precipitation is likely in East Africa, Central and South Asia, southern South America, the southern United States, northern Mexico, and eastern East Asia. Conversely, parts of Southeast Asia, Australia, Southern Africa, Central America, and northern South America might experience above-average precipitation.

Extreme high temperatures will also likely be a factor, particularly for those regions at risk of experiencing drier-than-average conditions given heat extremes can worsen drought stress. Last year was the warmest on record due to strong El Niño and climate change. While La Niña events typically bring cooler global temperatures, it is unlikely to significantly change in 2024. This year has already broken temperature records, and there is a high chance that 2024 will rank among the top five warmest years on record.

Potential Crop Impacts

La Niña events have historically led to slightly higher than average global-level yields for rice, while not significantly impacting wheat or maize yields.

How the current potential La Niña event will impact agricultural production is uncertain as no two events are the same. With global temperatures at unseen levels, the negative effects could potentially be exasperated. However, based on historical La Niña events, some crops in some regions will likely experience yield impacts. For wheat, yields tend to be positively impacted in Argentina, southern Brazil, Morocco, Portugal, Australia, China, and India, while negatively impacted in parts of the United States, East Africa, and Central Asia. For maize, yields tend to be positively impacted in parts of South-eastern Africa, China, India, and Thailand, while negatively impacted in South America and US. For rice, yields tend to be slightly positively impacted South, East and Central Asia, southern Brazil, and Central America, while negatively impacted in the Middle East, Bolivia, and the US. The negative impacts tend to be lessened for irrigated crops compared to rainfed crops. However, only when the likely La Niña event arrives in combination with likely extremely high global temperatures will its actual impacts on agriculture begin to be known.



Official NOAA CPC ENSO Probabilities (issued Apr. 2024)

TÜRKIYE

Tariffs on Russia Federation & Belarus products

(Terre-net, 11/06)

Le ministre turc de l'Agriculture a annoncé la semaine dernière que le pays bloquait ses importations de blé à partir du 21 juin et jusqu'au 15 octobre, voire au-delà. L'objectif est notamment de protéger les producteurs turcs des baisses de prix au moment de la récolte, de créer un marché qui leur est favorable, et d'« assurer l'approvisionnement domestique en matières premières ». Cela devrait détourner une partie des exports russes vers d'autres pays importateurs.

UKRAINE

Below-average outlook for winter crops in Ukraine

(Joint Research Centre - Global Outlook on Ukraine, 17/06

According to the June 2024 issue of the JRC MARS Bulletin, a rain deficit and heatwave adversely affected the yield for winter crops, especially in the eastern regions. The yield forecasts for winter crops are below the 5-year average, while the yield forecasts for summer crops currently follow the 5-year average. Field abandonment continues to be observed in several parts of the country (particularly close to the front line and in the northeast). The production for wheat is forecast at 20.7 MT (-25% y/y), and for winter barley at 2.9 MT (-12%), with the caveat that 12.5% of the production remains in oblasts under Russian occupation.

SCOOPS

Pour plus de new :

- Scoop it news
- Website MED-Amin
- LinkedIn MED-Amin

Mapping the race between crop phenology and climate risks for wheat in France under climate change

Le Roux, R., Furusho-Percot, C., Deswarte, JC. et al. Sci Rep 14, 8184 (2024).

Climate change threatens food security by affecting the productivity of major cereal crops. To date, agroclimatic risk projections through indicators have focused on expected hazards exposure during the crop current vulnerable seasons, without considering the non-stationarity of their phenology under evolving climatic conditions. This paper proposes a new method for spatially classifying agroclimatic risks for wheat, combining high-resolution climatic data with a wheat phenological model. The method is implemented for French wheat involving three GCM-RCM model pairs and two emission scenarios. The authors found that the precocity of phenological stages allows wheat to avoid periods of water deficit in the near future. Nevertheless, in the coming decades the emergence of heat stress and increasing water deficit will deteriorate wheat cultivation over the French territory. Projections show the appearance of combined risks of heat and water deficit up to 4 years per decade under the RCP 8.5 scenario. The proposed method provides a deep level of information that enables regional adaptation strategies: the nature of the risk, its temporal and spatial occurrence, and its potential combination with other risks. It is a first step towards identifying potential sites for breeding crop varieties to increase the resilience of agricultural systems.

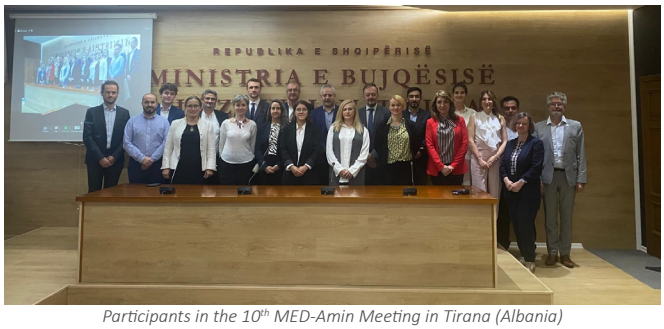
↪ Read the article here

An integrated assessment of the impact of agrobiodiversity on the economy of the Euro-Mediterranean region

Nicita L., Bosello F., Standardi G., Mendelsohn R. (2024). Ecological Economics, 01/04/2024, vol. 218, p. 108125.

In the past decades, agricultural landscapes have simplified with crop specialization and the reduction of seminatural covers leading to a decline of biodiversity and (biodiversity-driven) ecosystem services. This study measures the impact of landscape agrobiodiversity on the economy of southern Europe. The analysis relies on regression analyses to measure the effect of agrobiodiversity on the value added of farms. A regionalized Computable General Equilibrium model is then used to examine how these results affect the economy at large. The results show that increasing local richness and regional evenness tends to have positive impacts on the agricultural sector and GDP whereas increasing local evenness and regional richness tends to be harmful to the agricultural sector and GDP. The results also suggest that some regions of southern Europe are better off with more agrobiodiversity whereas other regions are better off with less. A targeted program may be better than a uniform policy across all of southern Europe.

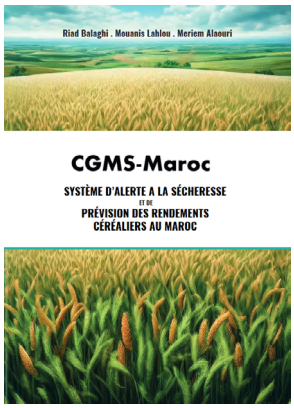
↪ Read the article here



Participants in the 10th MED-Amin Meeting in Tirana (Albania)

RAPPORT - Le système d'alerte à la sécheresse et de prévision des rendements céréaliers au Maroc

Riad Balaghi, Mouanis Lahlou, Meriem Alaouri., CGMS-Maroc, INRA Editions.



Le Maroc est confronté à des défis croissants pour son agriculture céréalière pluviale, pilier de sa sécurité alimentaire, en raison de la raréfaction et de l'irrégularité accrues des précipitations sous l'effet du changement climatique. Avec des rendements en blé et orge fortement tributaires des aléas climatiques, la production nationale peine à satisfaire les besoins d'une population en augmentation. Pour relever ce défi, le pays a investi depuis 20 ans dans le développement du système novateur CGMS-Maroc (Crop Growth Monitoring System), outil d'aide à la décision pour le suivi des campagnes agricoles et la prévision des rendements céréaliers.

Née d'une collaboration entre institutions nationales (INRA, IAV Hassan II, Direction Générale de la Météorologie, ministère de l'Agriculture) et organismes internationaux (Centre commun de recherche de l'union européenne, Université de Liège, VITO, Alterra, etc.), la plateforme CGMS-Maroc mobilise des technologies de collecte de données, modélisation agro-climatique et intelligence artificielle. Elle repose sur 3 piliers : l'harmonisation de données multi-sources, la prédiction des rendements par modèles mathématiques et la diffusion des résultats via une interface Web.

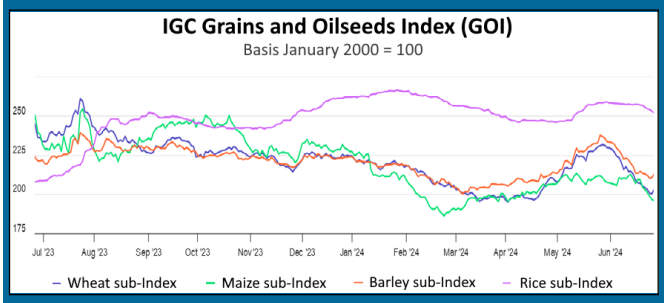
↪ Rapport complet (FR version)

↪ Full report (EN version)

Trends on Global Markets

	Global Price Index [1] (Jun. 2024)		Supply & Demand in Jul. 2024[1] From previous forecast (M/M)	From previous season (Y/Y)
Blé/Wheat	212	↘	↔	▼
Maïs/Maize	205	↘	↔	↔
Riz/Rice	256	↗	↔	▼
Orge/Barley	213	↘	n/a	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

Events

26-30 08 2024

18th Congress of the EAS (Rennes, France)

The **European Society for Agronomy** (ESA) aims to promote the exchange of scientific and practical experience between experts in agronomy. This congress aims to vertebrate transformation in agricultural systems with new alliances, and synergies. It will be welcome by l'**Institut Agro Rennes-Angers**, in collaboration with **INRAE**.

↪ **Visit the webpage**

23-25 09 2024

IAOM Eurasia Conference & Expo (Baku, Azerbaijan)

The **International Association of Operative Millers** (IAOM) is the largest non-profit organization in the field of grain milling. This event will gather grain millers and trade representatives of Central and Eastern Europe, Baltic, Black Sea and Central Asian countries for sharing ideas, technical and educational opportunities, and networking.

↪ **Visit the webpage**

CIHEAM
International Center for Advanced Mediterranean Agronomic Studies

MED-Amin

Coordination
CIHEAM Montpellier
↪ contact@med-amin.org

Site Web
↪ http://www.med-amin.org