



REPORT 2014

Synthesis following the first data collection

February 2015
www.med-amin.org

Contents

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INTRODUCTION

MED-Amin is a Mediterranean information network on agricultural markets. It was first set up on January 22nd and 23rd, 2014, in Paris. The initiative was officially launched during CIHEAM 10th ministerial meeting, which was held in Algiers on February 6th, 2014.

The MED-Amin initiative aims at enhancing the cooperation and information sharing between national information systems on agricultural markets located in the 13 Mediterranean countries members of the CIHEAM network. This network is dedicated initially to strategic cereals (wheat, maize, barley, rice) for the food security in the Mediterranean area. The evolution of prices, the stability of the offer of these vital products constitute major preoccupations for the populations and local authorities of these countries. Coordinated by CIHEAM, and in particular by its Mediterranean Agronomic Institute of Montpellier, this network collaborates with the Secretariat of the G20 AMIS initiative based in Rome, with FAO and the European Commission. Focal points have been appointed in every member countries and are responsible for the mobilization of national actors implied in the data collection and analysis so as to enhance knowledge, data and methodologies within the network.

MED-Amin aims at developing trust between the members of the network as well as a stronger mutual understanding, through meetings, experience-sharing, and a common work on the monitoring of cereal markets in the Mediterranean area. Through its data collection process, the network targets the improvement of the information on cereal markets (production, utilization, stocks, prices, trade) within the region, while aiming at the preparation of forecast balance sheets. The process of data collection itself is an opportunity to develop information and methodology sharing. The network may also produce analysis, in particular on short-term perspectives, as well as advocacy material for an enhanced communication towards media and policy-makers. MED-Amin is an initiative relying on a definition of objectives through the members' continuous and dynamic dialogue, so as to respond to the countries' specific needs. More information on the network can be obtained from the website: www.med-amin.org

Following the first MED-Amin meeting, a questionnaire was designed with the purpose of establishing a state of the art on national market monitoring systems. In order to keep that pilot data collection light, the first part of the questionnaire focused on soft and durum wheat data only. It was sent back by the designated focal points in each country in July 2014.

The current document represents a synthesis of the collected data as well of the issues raised while using the first version of the questionnaire. Consequently, it also presents some of the main modifications that were applied when designing the second version of the questionnaire. This new version will be used for data collection on all five commodities (soft wheat, durum wheat, rice, maize, barley) during the first half of 2015.

METHODOLOGY

The first MED-Amin data collection campaign, realized during year 2014, aimed at evaluating the feasibility, for countries, of collecting the necessary data required for the work of the network.

This questionnaire was based on the principle of collecting the main elements constituting a cereal Balance Sheet:

- Production and associated data (harvested areas and yield)
- Data on Imports and Exports in volume and in value
- Utilizations, as subdivided between human use, animal use, and other utilizations.
- Losses.
- Stocks.

This data collection was realized using a Word pre-formatted file and was focused only on data for both main wheat types (soft and durum) and their respective main first stage processed-products (flour and semolina).

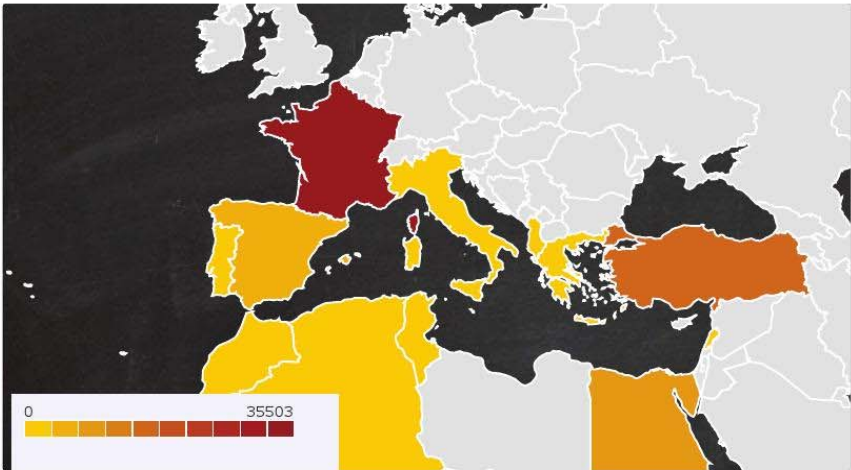
The questionnaire also included the collect of data on national producers and consumers prices.

Following the return of the questionnaires, the data collection was complemented by a bilateral dialogue between MED-Amin secretariat and the designated focal points. This dialogue's main objective was to organize the collection of insights on the data collection, in particular through the validation by focal points of points that may have seemed out-of-range as well as via the request of additional precisions on the origins or definitions of certain statistical entities.

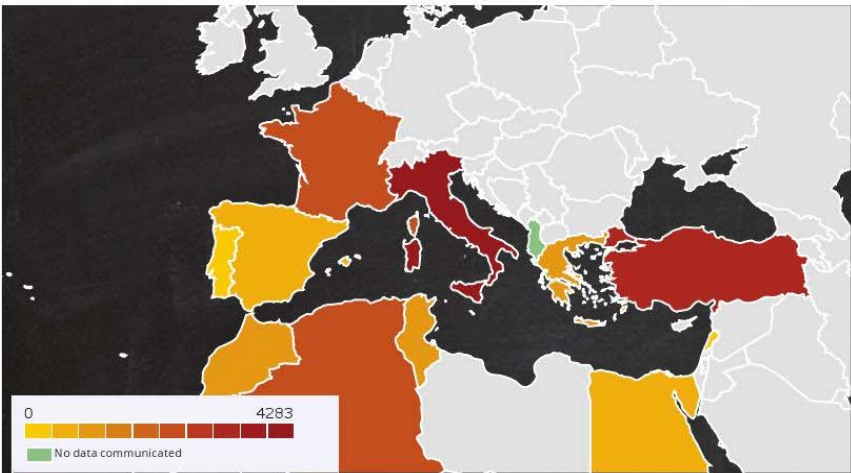
VISUALIZATION OF THE DATA

You will find in Annex the data collected by MED-Amin and used to create these maps.

3.1 Wheat production (data on grains only)

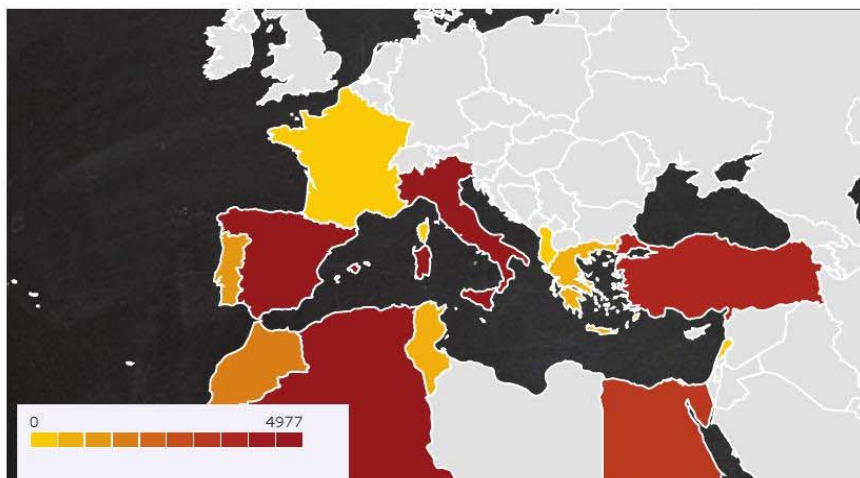


Map 1. Soft wheat production (2012, '000 T)

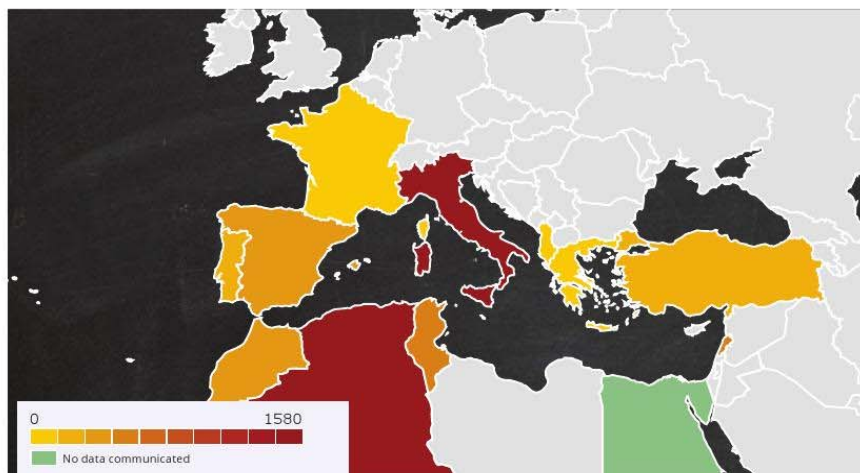


Map 2. Durum wheat production (2012, '000 T)

3.2 Imports (data on grains only)

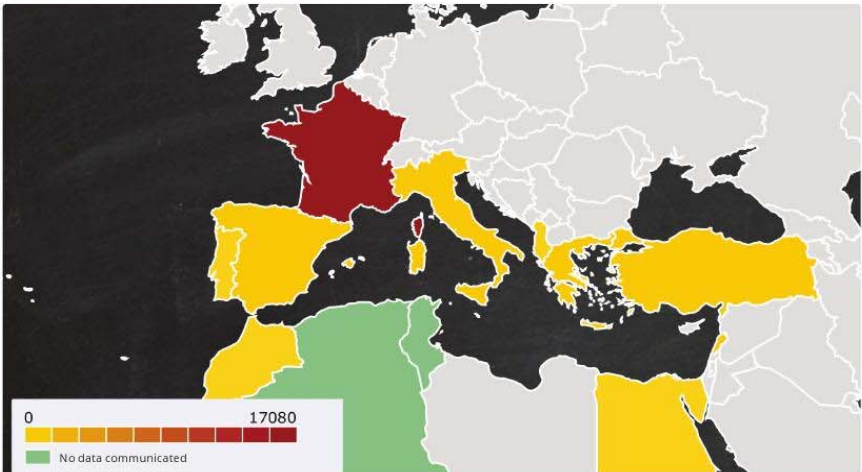


Map 3. Soft wheat imports (2012, '000 T)

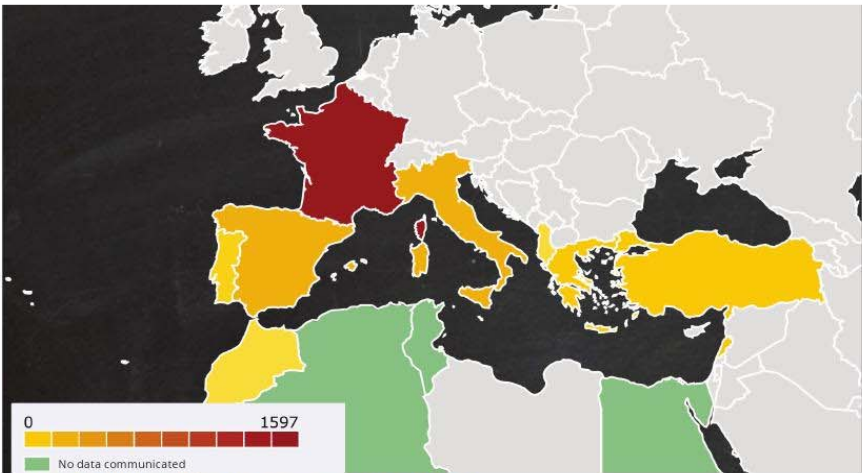


Map 4. Durum wheat imports (2012, '000 T)

3.3 Exports (data on grains only)



Map 5. Soft wheat exports (2012, '000 T)



Map 6. Durum wheat exports (2012, '000 T)

METHODOLOGICAL CONSTRAINTS AND CONTRIBUTIONS OF THE NETWORK

The analysis performed after the data collection in 2014 reveals a number of limits that illustrate the relevance of a network such as MED-Amin for the improvement of national information systems, through continuous experience sharing and multilateral dialogue.

1. Shortcomings in the collected data.

- Data are missing for the last year of the series (2013) for some countries.
- The data about stock levels (as well as the associated definitions) (food reserves, strategic reserves, public or private, etc.) are scarce.
- The information concerning uses (Food, Feed, Other) have been provided by less than half of the countries for commodities, and by a number inferior for processed products (flour, semolina): some data were provided only by two countries for flour and by eight for semolina, of which six were aggregated within the "Other uses" category.
- Only two countries for durum wheat and three countries for soft wheat reported data on losses, although this data line is usually estimated. It may be useful to analyse this issue more thoroughly, given the importance given to Losses within the region.
- The reported data for prices remain fragmentary and lack coherence (because of the lack of meta-data on the collected information).

2. Heterogeneity of methodologies and lack of details

It is obvious that both methodological and technical modalities differ from one country to another. Strong disparities may exist also in terms of financial and human means in the countries. Accordingly, it is not surprising to notice discrepancies within the data collected by the 13 member States of CIHEAM.

Consequently, the lack of information provided does not guarantee the a posteriori harmonization of the collected data (e.g. for prices, but also for imports, exports and other uses). For example, it is difficult to know whether countries aggregate data on grains with the data relative to processed products within their trade figures, because we did not know what statistical codes were used for customs data. In the same way, for consumer prices, if data on the reference products are missing, comparing prices from one country to another is impossible. For stocks, no precision was given on the period when measurements were realized (at the closure or at the opening of the marketing year).

The handbook created for the new data collection in 2105 places a strong emphasis on the provision of explanations. It allows the clarification of the sources and definitions relative to the data to provide and defines the statistical codes to avoid any confusion.

3. Need for a validation process.

A bilateral dialogue was started with each country so that focal points are consulted on salient – sometimes reflecting erroneous – points: anomalies were pointed out, as well as disruptions in data series, or even, series missing entirely.

Following this bilateral process, a number of countries rectified their data table and provided precisions on their sources as well as on the methodologies used to collect the data. The reciprocal trust observed when working together is a strength of the network. This bilateral dialogue took place between the month of July and October 2014.

Besides, the data were compared with statistical series released by international organizations (FAO, AMIS, IGC, UN-COMTRADE) or EU/EUROSTAT and USDA. In case of strong discrepancies, additional requests were addressed to countries so as to understand the differences (aggregation of durum and soft data, grains and flour, etc.).

4. Data harmonization is required before a proper analysis.

The conversion of data to the same units was necessary and realized by the Secretariat of the MED-Amin network in order to compare the data. As an example, data on harvested areas are not expressed in the same unit all around the Mediterranean (hectare, but also decare, dunum, feddan, etc.); the same issue was encountered for currencies values, or even volumes. Sometimes, units were not provided.

Under their current form, data concerning processed products do not allow for direct aggregation, as the first questionnaire did not include the possibility to collect information on transformation coefficients required to convert data to “grains equivalent”. The implementation of such aggregate data within the second questionnaire will allow an easier comparison to statistics released by other organizations (FAO, AMIS, IGC, USDA, etc.).

IMPROVEMENTS IMPLEMENTED FOR THE NEXT DATA COLLECTION

From a methodological point of view, the new questionnaire in 2015 will use a spreadsheet version that should ease the data compilation. The new version also fixes the units that are to be used for transmitting the data (thousand hectares, thousand tons) in order to facilitate the data treatment and to reduce unit-related mistakes. Countries remain free to choose whatever unit for currencies.

Also, countries will be required to provide data using their own national marketing year (NMY) as a reference. The NMY starts at the first month of the national harvest. It should allow more relevant data on stocks, as the beginning and the end of the national marketing years are deemed to be the period during which stock levels are the lower. Stock levels so reported consequently do not take into account as much “working stocks”.

The new questionnaire additionally prepares focal points to the construction of balance sheets established in “grain equivalent”. It provides specific subparts dedicated to the collection of data on processed products and asks member countries to provide data on transformation coefficients allowing for the integration of data within a unique referential. The presentation of balance sheets in “grain equivalent” makes it possible to control the equilibrium of statistical data throughout the whole cereal sector under consideration. It is also a standard used by reference organizations and allows for an easier comparison with other sources of data (FAO, AMIS, IGC, USDA, etc.).

Finally, the new questionnaire is provided along with a handbook providing explanations on the way to use it, more precise definitions of the statistical categories that should be filled-in, as well as a presentation of the underlying principles governing the construction of a cereal balance sheet. This handbook, accessible both in French and English, provides the focal points with a list of statistical codes using two of the main reference frameworks (NC8 and HS6).

PROPOSALS FOR FURTHER WORK

For MED-Amin

The list of potential objectives for 2015, as presented below and ratified during the network's second meeting held in Izmir, in November 2014, is not exhaustive. It is meant to evolve following the suggestions that may be expressed by the focal points so as to best answer their expectations and needs.

- **Improved data collection:** Countries are requested to fill in during 2015 a new questionnaire allowing for a detailed analysis on cereals balance sheets the Mediterranean area. A publication is contemplated in autumn 2015. Countries may give precision about any difficulty encountered while collecting data, in particular relative to uses (food, feed, industrial, seeds, etc.), losses and stocks.
- **Training and capacity-building:** MED-Amin may implement, with CIHEAM support, as well as other experts on a case by case basis, training sessions, whether in-person or through distance learning, to allow focal points to complete their knowledge, or even to transfer knowledge and practices from one member country to another.
- **E-learning:** Another objective for MED-Amin would be the implementation of an e-learning training module allowing new focal points or other users to quickly acquire the skills and knowledge relative to Mediterranean markets, so that they may be quickly operational in their work and participation to the network.
- **Studies and researches and surveys on cereal sectors in the Mediterranean area:** Building on the network of CIHEAM students, researchers and alumni, studies may be realized on the cereal sector within MED-Amin member countries on issues beyond the scope defined by the current data collection process (i.e. logistics issues, sectorial organization, strategies implemented by private and public actors, agricultural and food policies, ...). Additionally, a number of CIHEAM experts and associates may propose forecasts or more detailed studies on international or Mediterranean cereal markets, on national challenges emerging from cereal sectors, so as to second member States in their business intelligence relative to these strategic issues. For example, the network may rely on studies that would be realised by students from the CIHEAM-MAIM Master's program in Agro-logistics and agricultural value chains.

PROPOSALS FOR FURTHER WORK

For member countries

In order to complete the 2015 data collection, member countries were asked to provide data using the national marketing year referential. Countries should thus make sure that, at their respective level, they have the necessary monthly data required to operate the translation to this new framework.

Furthermore, the feedback from the 2014 data collection campaign revealed question marks about the statistical categories to be used, in particular regarding international trade. Within the new handbook that comes along with the new questionnaire, focal points will find the precise statistical codes defining the data to be collected, within two different harmonized nomenclatures used at the international level (respectively NC(8) and HS(6)). Countries should thus make sure that either one or the other of this nomenclature are in use within their customs department, and contact the MED-Amin secretariat, for any interrogation.

For the countries with strong difficulties in collecting data, capacity-reinforcement training sessions might also be organized in collaboration with experts (that could be part of the Global strategy on agricultural statistics¹).

Finally, the participation to the network will be facilitated by the implementation of the MED-Amin (www.med-amin.org) website, of the its newsletter and of the online forum on international trade of cereals in early 2015.

These communication material aims at enhancing the network's visibility as well as CIHEAM's 13 member-states' support and will to work together towards a stronger food security within the region.

¹ For further reference : <http://www.fao.org/economic/ess/ess-capacity/ess-strategy/en/>

MED-AMIN 2014 DATA FOR PRODUCTION, IMPORTS AND EXPORTS

TABLE. Data collected during the first MED-Amin data collection, 2014 (thousand tons)

| | | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|---------|-------------------|-------------|-------------|-------------|-------------|-------------|--------------|
| ALBANIA | Production | N.D. | N.D. | N.D. | N.D. | N.D. | N.D. |
| | o/w Durum wheat | N.D. | N.D. | N.D. | N.D. | N.D. | N.D. |
| | o/w Soft wheat | 335 | 333 | 295 | 293 | 300 | N.D. |
| | Imports | 285 | 267 | 271 | 317 | 293 | 293 |
| | o/w Durum wheat | 9 | 4 | 4 | 4 | 30 | 27 |
| | o/w Soft wheat | 276 | 264 | 266 | 313 | 264 | 265 |
| | Exports | 0 | 0 | 0 | 0 | 0 | 0 |
| | o/w Durum wheat | 0 | 0 | 0 | 0 | 0 | 0 |
| | o/w Soft wheat | 0 | 0 | 0 | 0 | 0 | 0 |
| ALGERIA | Production | 1111 | 3445 | 2953 | 2911 | 3432 | 3299 |
| | o/w Durum wheat | 814 | 2336 | 2039 | 2196 | 2407 | 2332 |
| | o/w Soft wheat | 297 | 1109 | 914 | 715 | 1025 | 967 |
| | Imports | 6352 | 5720 | 5232 | 7403 | 6296 | 6297 |
| | o/w Durum wheat | 1983 | 1853 | 1246 | 1852 | 1580 | 1088 |
| | o/w Soft wheat | 4369 | 3867 | 3986 | 5551 | 4716 | 5209 |
| | Exports | N.D. | N.D. | N.D. | N.D. | N.D. | N.D. |
| | o/w Durum wheat | N.D. | N.D. | N.D. | N.D. | N.D. | N.D. |
| | o/w Soft wheat | N.D. | N.D. | N.D. | N.D. | N.D. | N.D. |
| EGYPT | Production | 9193 | 9253 | 7761 | 9163 | 9524 | 10128 |
| | o/w Durum wheat | 671 | 731 | 593 | 793 | 730 | 669 |
| | o/w Soft wheat | 8522 | 8522 | 7168 | 8370 | 8794 | 9459 |
| | Imports | N.D. | N.D. | N.D. | N.D. | N.D. | N.D. |
| | o/w Durum wheat | N.D. | N.D. | N.D. | N.D. | N.D. | N.D. |
| | o/w Soft wheat | 5199 | 4006 | 9647 | 9871 | 3105 | N.D. |
| | Exports | 5 | 5 | 5 | 3 | 0 | N.D. |
| | o/w Durum wheat | N.D. | N.D. | N.D. | N.D. | N.D. | N.D. |
| | o/w Soft wheat | 5 | 5 | 5 | 3 | 0 | N.D. |

| | | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|---------|-------------------|--------------|--------------|--------------|--------------|--------------|--------------|
| FRANCE | Production | 38860 | 38186 | 38036 | 35993 | 37886 | 38638 |
| | o/w Durum wheat | 2102 | 2117 | 2549 | 2023 | 2383 | 1771 |
| | o/w Soft wheat | 36758 | 36069 | 35487 | 33970 | 35503 | 36867 |
| | Imports | 431 | 255 | 893 | 320 | 322 | N.D. |
| | o/w Durum wheat | 124 | 75 | 122 | 94 | 72 | N.D. |
| | o/w Soft wheat | 307 | 180 | 771 | 226 | 250 | N.D. |
| | Exports | 17934 | 18471 | 21541 | 17595 | 18677 | N.D. |
| | o/w Durum wheat | 1582 | 1292 | 1934 | 1555 | 1597 | N.D. |
| | o/w Soft wheat | 16352 | 17179 | 19607 | 16040 | 17080 | N.D. |
| GREECE | Production | 1600 | 1540 | 1640 | 1666 | 1571 | 1774 |
| | o/w Durum wheat | 1100 | 1220 | 1290 | 1220 | 1092 | 1176 |
| | o/w Soft wheat | 500 | 320 | 350 | 446 | 479 | 598 |
| | Imports | 912 | 909 | 833 | 965 | 750 | 758 |
| | o/w Durum wheat | 70 | 63 | 63 | 103 | 75 | 82 |
| | o/w Soft wheat | 842 | 846 | 770 | 862 | 675 | 676 |
| | Exports | 248 | 289 | 485 | 217 | 306 | 245 |
| | o/w Durum wheat | 210 | 253 | 468 | 215 | 295 | 225 |
| | o/w Soft wheat | 38 | 36 | 17 | 2 | 11 | 20 |
| ITALY | Production | 8771 | 6653 | 6949 | 6714 | 7789 | 7699 |
| | o/w Durum wheat | 5193 | 3709 | 4012 | 3858 | 4283 | 4158 |
| | o/w Soft wheat | 3578 | 2944 | 2937 | 2856 | 3506 | 3541 |
| | Imports | 5533 | 6522 | 7500 | 7321 | 6109 | 5793 |
| | o/w Durum wheat | 1666 | 2153 | 2598 | 2217 | 1544 | 1676 |
| | o/w Soft wheat | 3867 | 4369 | 4902 | 5104 | 4565 | 4117 |
| | Exports | 446 | 211 | 396 | 570 | 257 | 188 |
| | o/w Durum wheat | 329 | 166 | 323 | 491 | 202 | 147 |
| | o/w Soft wheat | 117 | 45 | 73 | 79 | 55 | 41 |
| LEBANON | Production | 63 | 72 | 41 | 44 | 54 | 55 |
| | o/w Durum wheat | | | | | | |
| | o/w Soft wheat | | | | | | |
| | Imports | 419 | 538 | 577 | 449 | 583 | 623 |
| | o/w Durum wheat | 1 | 1 | 71 | 2.9 | 54 | 20 |
| | o/w Soft wheat | 418 | 537 | 506 | 446 | 529 | 603 |
| | Exports | 67.2 | 28 | 34.1 | 6.8 | 7.8 | 3 |
| | o/w Durum wheat | 29.6 | 13.4 | 32 | 6 | 2 | 3 |
| | o/w Soft wheat | 37.6 | 14.6 | 2.1 | 0.8 | 5.8 | 0 |

| | | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|----------|-------------------|-------------|-------------|-------------|-------------|-------------|-------------|
| MALTA | Production | N.D. | N.D. | N.D. | N.D. | N.D. | N.D. |
| | o/w Durum wheat | N.D. | N.D. | N.D. | N.D. | N.D. | N.D. |
| | o/w Soft wheat | N.D. | N.D. | N.D. | N.D. | N.D. | N.D. |
| | Imports | 64 | 45 | 33 | 33 | 111 | 84 |
| | o/w Durum wheat | 26 | 15 | 0 | 0 | 66 | 48 |
| | o/w Soft wheat | 38 | 30 | 33 | 33 | 45 | 36 |
| | Exports | 19 | N.D. | 18 | 8 | 57 | 46 |
| | o/w Durum wheat | 14 | N.D. | 15 | N.D. | 31 | 35 |
| | o/w Soft wheat | 5 | N.D. | 3 | 8 | 26 | 11 |
| MOROCCO | Production | 3770 | 6370 | 4870 | 6020 | 3870 | 7100 |
| | o/w Durum wheat | 1240 | 2030 | 1630 | 1850 | 1130 | 1900 |
| | o/w Soft wheat | 2530 | 4340 | 3240 | 4170 | 2740 | 5200 |
| | Imports | 3900 | 2300 | 3140 | 3700 | 2100 | 2500 |
| | o/w Durum wheat | 400 | 800 | 540 | 700 | 400 | 700 |
| | o/w Soft wheat | 3500 | 1500 | 2600 | 3000 | 1700 | 1800 |
| | Exports | 0 | 0 | 0 | 0 | 0 | 0 |
| | o/w Durum wheat | 0 | 0 | 0 | 0 | 0 | 0 |
| | o/w Soft wheat | 0 | 0 | 0 | 0 | 0 | 0 |
| PORTUGAL | Production | 203 | 124 | 83 | 51 | 59 | 81 |
| | o/w Durum wheat | 7 | 20 | 16 | 4 | 4 | 3 |
| | o/w Soft wheat | 196 | 104 | 67 | 47 | 55 | 78 |
| | Imports | 1348 | 1637 | 1533 | 1285 | 1390 | 1076 |
| | o/w Durum wheat | 191 | 324 | 291 | 90 | 162 | 110 |
| | o/w Soft wheat | 1157 | 1313 | 1243 | 1195 | 1228 | 965 |
| | Exports | 59 | 76 | 65 | 38 | 45 | 9 |
| | o/w Durum wheat | 4 | 16 | 8 | 5 | 7 | 2 |
| | o/w Soft wheat | 54 | 61 | 57 | 33 | 38 | 7 |
| SPAIN | Production | 6831 | 4805 | 5941 | 6877 | 5190 | N.D. |
| | o/w Durum wheat | 1185 | 1401 | 1000 | 900 | 499 | N.D. |
| | o/w Soft wheat | 5647 | 3403 | 4941 | 5976 | 4690 | N.D. |
| | Imports | 4538 | 6685 | 4752 | 4371 | 5405 | 3301 |
| | o/w Durum wheat | 284 | 365 | 421 | 337 | 429 | 327 |
| | o/w Soft wheat | 4255 | 6319 | 4331 | 4034 | 4977 | 2974 |
| | Exports | 551 | 532 | 437 | 586 | 281 | 592 |
| | o/w Durum wheat | 488 | 447 | 384 | 536 | 220 | 510 |
| | o/w Soft wheat | 63 | 84 | 53 | 50 | 61 | 82 |

| | | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
|---------|-------------------|--------------|--------------|--------------|--------------|--------------|--------------|
| TUNISIA | Production | 919 | 1654 | 822 | 1605 | 1523 | 975 |
| | o/w Durum wheat | 731 | 1354 | 671 | 1321 | 1240 | 795 |
| | o/w Soft wheat | 188 | 300 | 151 | 284 | 284 | 181 |
| | Imports | 1767 | 1229 | 1915 | 1590 | 1503 | 1625 |
| | o/w Durum wheat | 659 | 435 | 811 | 524 | 573 | 558 |
| | o/w Soft wheat | 1108 | 794 | 1103 | 1066 | 930 | 1067 |
| | Exports | N.D. | N.D. | N.D. | N.D. | N.D. | N.D. |
| | o/w Durum wheat | N.D. | N.D. | N.D. | N.D. | N.D. | N.D. |
| | o/w Soft wheat | N.D. | N.D. | N.D. | N.D. | N.D. | N.D. |
| TURKEY | Production | 17782 | 20600 | 19674 | 21800 | 20100 | 22050 |
| | o/w Durum wheat | 2782 | 3740 | 3450 | 3850 | 3300 | 4075 |
| | o/w Soft wheat | 15000 | 16860 | 16224 | 17950 | 16800 | 17975 |
| | Imports | 3708 | 3393 | 2554 | 4755 | 3719 | 4053 |
| | o/w Durum wheat | 152 | 111 | 81 | 24 | 218 | 589 |
| | o/w Soft wheat | 3556 | 3281 | 2474 | 4730 | 3502 | 3464 |
| | Exports | 8 | 301 | 1171 | 5 | 116 | 275 |
| | o/w Durum wheat | | 100 | 345 | 2 | 0 | 0 |
| | o/w Soft wheat | 8 | 201 | 826 | 3 | 116 | 275 |

CREDITS

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COORDINATION

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