MED-Amin: Agricultural Market Information Network

Seventh Meeting (online), 25 & 26 November 2020

Conclusions

Introduction

The Mediterranean Agricultural Market Information Network (MED-Amin) met for the seventh time on 25 and 26 November 2020, online as a consequence of the covid-19 pandemic.

This meeting follows those of Paris (January 2014), Izmir (November 2014), Rome (October 2015), Tunis (December 2016), Valletta (January 2018) and Meknes (January 2019). It has continued to strengthen the MED-Amin initiative, which aims to foster cooperation and facilitate the sharing of experiences between national information systems on agricultural markets.

The CIHEAM Secretary General, **Mr. Placido Plaza**, launched the meeting by recalling "the fragility of the Mediterranean region in terms of food security. The brutal impact of the covid-19 reminds us of the importance of building mechanisms of cooperation and development, like MED-Amin".

After the sixth meeting which opened the floor to private sector, this edition gathered 45 persons from MED-Amin partners and experts on grains markets. A round-table of five panelists on upcoming challenges of grain sectors in the Mediterranean region was on the spotlight. Further collaboration with the **private sector** on grain market monitoring, including supply and demand previsions, would be a sizeable opportunity for many countries to improve transparency and information sharing and finally food security, highlighted in her introductory intervention **Ms. Lauresha Grezda**, MED-Amin Focal Point for Albania. **Mr. David Gasc**, MED-Amin coordinator, presented the main achievements of the network after 5 years of activities. He emphasized in particular the **enhanced dialogue** thanks to a dynamic network. **Information sharing on cereals markets has improved** even if obstacles remain to reach fully accurate and timely information. The network progressed in the field of **crop monitoring and warning capacities** with a fruitful collaboration with the Joint Research Center of the European Commission. Finally, MED-Amin provided analysis and studies for policy-makers, including most recently on the **impact of Covid-19 on Mediterranean cereals sector**.

An audit in 2019 recommended to **enlarge the scope of the network's activities**, as well as to increase the political profile of its governance. A survey has been carried out to collect and update data on current needs vs MED-Amin (see after some key results). Experts and policy makers debated on November 25 emerging and recurring regional challenges to food security. In addition to survey results, this expert contribution will pave the way for new MED-Amin activities, and strengthened collaborations.

Session 2: Grains markets outlook

Grains markets outlook in the world (**Mr. Denis Drechsler**, FAO/AMIS) and in the Mediterranean region (**Mr. Arnaud Petit**, International Grains Council-IGC) were presented. The following elements can be highlighted:

1. **Major staple commodities** remain available **with comfortable global stocks**. Global food markets are relatively unscathed from COVID-19 health crisis besides a sharp global economic slowdown. Global supply chains have proved a high degree of resilience.

2. However, global food commodities market is **increasingly demand driven, and increasingly volatile**. International production increases but exporting countries do not have stocks to trade.

3. **Geopolitical aspects should be further taken into account in food markets analysis**. For instance (1) revisions on Chinese market where stocks of maize or soybeans are largely unknown or unclear, led to repeated large purchase well above international expectations, which is tightening global markets. For example, 2/3 of soybeans available on the international market are purchased by China. A closest monitoring of Chinese market, with a predominant share in agricultural commodities trade, would be a big hit to reduce market uncertainties. Among the four monitored commodities by AMIS, soybean balance is the tightest; (2) trade restrictions taken by Argentina where maize export tariffs reduced origin competitiveness on international market; (3) Russia and Ukraine where wheat exports quotas during the pandemics and currencies devaluation have rendered prices non-competitive to date.

4. While medium-term forecasts point to a downward trend for main agricultural commodities, the current pandemic crisis has been accompanied in recent months by a **significant increase in wheat, soybeans and corn prices, due to a firm demand of basic food commodities**. While far from reaching the highest levels of the 2007 and 2008 food crisis, this significant rise in price reminds us of the fragility of global markets, and the vulnerability of certain regions.

5. We face **growing uncertainties and food security concerns**, particularly in low income countries, often largely affected by climate change. The issue is not so much supply at international / national levels but **increasing difficulties to access food for low income households** - with limited purchasing power - hit hard by the Covid crisis.

6. The Mediterranean is one of the most vulnerable regions to prices volatility, with southern rim countries concentrating 30% of global wheat imports, which makes **the Middle East and North Africa region the most dependent on imports in the world** (almost 60 Mt imported / year). Imports continue to rise. Currency changes had also a strong impact on grain import costs and supplies in recent years (e.g. in Algeria).

7. The **increase in Mediterranean countries' consumption, driven by a dynamic demography, exceeds the productive capacities** of these regions, in particular for wheat and corn. Yields improvements are often limited by physical boundaries (climate, orography…). Milling wheat consumption per capita is stable around 100 kg/inhab.

8. **The Mediterranean market is** not regional any longer (North-South) but **increasingly international** with large supplies coming from the Black Sea (Russia, Ukraine), South America (e.g. Argentina), and Baltic countries in recent years. Recent trade restrictions of neighbouring Black Sea / Eurasian

countries have motivated Mediterranean importers to investigate on further origins for their supplies.

9. The Mediterranean market while important in proportion of total international trade **is too segmented to be visible**, and thus cannot be efficiently targeted by export countries. **Further coordination** on market specifications may **improve the visibility and market access / efficiency of Mediterranean countries**, which would thus be considered a relatively homogeneous market.

10. **Feed sector increasingly important in several Mediterranean countries**, due to blooming poultry and aquaculture sectors highly dependent on imported feed. A shift is observed from barley to maize in feed markets. North Africa's maize imports increased, and are expected to continue, but 2020/21 purchases are likely to be capped by larger production in Egypt (the only significant producer in the region). Everybody looks at US supply (and Brazil for the second half of 2020/21 NMY) because Argentina and Ukraine foresee a tighter output. Facing an increase in feed needs private actors may reconsider their choices between milling and feed. In Morocco an increase in poultry production raised demand for local grain.

11. Like maize, Feed demand is a key driver of barley market. Barley market is becoming a less global market, with more locally sourced supplies. Trade is projected to contract by 2% y/y.

12. **Changes in transport modalities towards larger vessels implies changes in many logistics facilities along the value chain**, including discharge areas and modalities, storage, port to rail connections, etc.

13. Increasing attention must be payed to non-cereals grain markets, including **pulses** which represent 16 Mt of international trade annually and thus have a **potential for food security**.

Session 3 - Round table: « Upcoming challenges in the Mediterranean in connection with cereals markets »

The round table moderated by **Ms. Elen Lemaître-Curri**, deputy director of CIHEAM-IAMM, provided experts' views on:

- Recent developments in the cereal markets in CIHEAM countries and in the Mediterranean as a whole, and bottlenecks affecting food security;
- Strategies in place or envisaged to secure a good and accessible supply of grain;
- Major obstacles and constraints hampering good knowledge of the grain markets in the Mediterranean or in specific countries, and the way for MED-Amin to contribute overcoming those obstacles.

Mr. Shaban Salem, Director of Agriculture Economic Affairs Sector, Ministry of Agriculture and Land Reclamation in Egypt, emphasized sizeable and strategic objectives and actions to implement for food security in Egypt:

- Expanding cultivated areas. Production areas will be expended in wheat, maize, and barley, with the objective to **reduce dependency on imports and to cover 50% of national needs** in wheat and maize.
- Maximizing the use of by-products, in particular of maize and rice for feed sector.

- **Diversifying consumption**, to improve nutrition and reduce reliance on imported wheat.
- Reducing yield gaps between research trials, extension and farmer production.
- **Reducing waste in the value chain in particular for maize and rice**. Progress could be made in storage and transformation of cereals other than wheat, as the government only intervenes in wheat storage (currently covering 3 months of consumption, with a plan to expand it as a consequence of the pandemic).
- Investing in feed: with a **rapidly increasing poultry and aquaculture sectors, Egypt needs increasing amounts of feed with opportunity for private investment** yet to be fully realized.

Through targeted analyses, MED-Amin could help realize this potential, with diversifying consumption, reducing waste in the value chain, increasing transformation, and local feed production potential subjects.

Mr. Farouk Aoun Seghir, Director of external trade of OAIC (Algerian Intersectoral Office for Cereals), Algeria, pointed out the most relevant issues for Algeria and more generally the Mediterranean region:

14. Algeria is a major importer of soft wheat, durum wheat and barley in world markets. Guaranteeing these imports means being **constantly on the lookout for new opportunities and ready to adapt to alleviate dependence** on sources whose availability and conditions can change rapidly.
15. Algeria has thus had to **review its specifications (on quality aspects) for imported wheat** to open up to the Black Sea market in 2020/21. Algeria has also taken an interest in Argentine wheat, although its competitiveness has been challenged by a recent Argentine government export tax intended to protect domestic consumption.
16. To access information and relevant partnerships, the OAIC participates in the IGC agora and in international events such as TrigAR organized by Argentina to promote **cooperation between wheat producing and importing countries**. All the major countries of the Mediterranean were present at TrigAR 2019, which is important to **consider the region as a sizeable market**.
17. Faced with the high prices of Russian, Ukrainian and Argentinian wheat this year, Algeria has chosen to source newly from the Baltic countries which have a large exportable surplus.
18. In the face of too much information, the most critical information can slip away. For instance, between the two last USDA Wasde reports, significant quantities were revised (upward in the case of Chinese imports), which had direct impacts on international prices.
19. The MED-Amin network could be a valuable support in this context. Thus, the surge in corn prices (and by implication of soft wheat), linked to imports much higher than expected in China, **demonstrates how information** (e.g. on volumes and prices) **are critical. When delivered on time and with reliable data**, it gives tools to anticipate the evolution of the major cereal markets. This **information must cover the main fundamentals: hazards, surfaces, yields but also geopolitical issues to signal anomalies, changes**... MED-Amin could provide this type of light and hopefully strengthen cooperation between all the countries of the Mediterranean and beyond, fostering win-win collaborations. **Meetings with the major exporting countries** would also be beneficial, as is currently the case with France (through France Export Céréales) and the United States.

Mr Gunhan Ulusoy, Chairman of the Turkish Flour Industrialists' Federation and the International Association of Operative Millers - Eurasia, highlighted several critical points on wheat milling in Turkey and in the region, of which:

20. Turkish wheat production remains buoyant (around 20 Mt), helped by increasing yields offsetting the decrease in acreage. However, **wheat imports have grown rapidly, following increasing exports of processed wheat products**. Turkey is currently the second exporter of pasta worldwide after Italy. Turkey has a very large milling capacity, which would be sufficient to transform all the total flour yearly trade!

21. The international flour market only represents 15 Mt trade annually and is very limited when compared with the international wheat market of 185 Mt. Flour has a much shorter shelf life. However, the **flour market is particularly important as a buffer** to serve countries where major political disruptions have affected the milling industry or where access to wheat is insufficient (temporary shortages).

22. Compared to wheat grains trade, the **flour sub-commodity provides more flexibility to food supply chain**, especially when demand/consumption need is not sizeable. Indeed, flour can be shipped by containers which can carry even very small amount of flour, from 24 tons on. For example, to import wheat, a minimum of 5,000 tons must be ordered for Mediterranean market originated from Black sea or EU, 25,000 tons minimum for US or Australia origin vessels.

23. **Consumers demand evolves quickly** in Turkey, with increasing requirements for traceability, quality, and organic products. These evolutions challenge the milling sectors and have led to restructuring, including development of B to C value chains in place of former B to B relations.

24. The current Covid situation reminds government of food security concerns. Despite the absence of production shortage, **Covid pandemic has triggered a vicious circle**, with exporting countries protecting their national production from exports, leading in reaction to precautionary purchases to stockpile in importing countries, thus increasing exporting countries protection, etc. **Dialogue between exporting and importing countries could help cool down the market**, in particular when no particular shortage is to be anticipated. MED-Amin could provide important support in this regards.

Mr. Dmitry Prikhodko, Senior Economist, Investment Centre Division at FAO, presented ways to improve food security through market efficiency and transparency in North Africa, with the case of Egypt.

25. Cereals are critical for food security in North Africa (2/3 of daily calories intake in Egypt). **Imports** increased (Egypt is the 1st world wheat importer) and **will increase more in the coming years**, particularly for **wheat (+35%** expected in **2029) and maize (+22%** in **2029)**, not only due to **human consumption rise but also to feed and exports opportunities** (in 2019, Egypt became the top 4 flour exporter, exporting in particular in Sub-Saharan Africa). Continuing efforts and **investments in processing industries would be a way to increase domestic added-value**.

26. Recent findings from FAO-EBRD work indicated that exporters overcharge GASC (the Egyptian General Authority for Supply Commodities) by at least USD 3.2/t due to the 180 day payment delay as they overcompensate for the cost of financing. **Paying exporters without delay would save** GASC at least around USD 15 million per year. Phytosanitary risks /rejections: if traders learn about a rejection 3 weeks before the tender date, they tend to increase prices by USD 2.2/t (1.2% of the average tender in 2018, and corresponded to an annual cost of roughly USD 14 million). **Tender and supply planning: more regular intervals between tenders would avoid delivery urgency and reduce the price paid.** The buyer pays roughly USD 0.15/t more for shortening the time until delivery by one day. Protein content above 12% also drive to USD 8.9/t add up. **Mildly lower protein content would lead to higher import volumes at a lower price with no major decrease in**

bread quality (up to 60 million dollars in savings annually).

27. There is a lack of transparency in publishing production data (areas and yields), as well as of consumption and stocks data. **The lack of market data is a problem for domestic millers and international exporters as it prohibits long-term planning**. When there is data, it is often outdated, inconsistent and/or of poor quality. **The lack of market transparency and reliable market data is a source of mistrust amongst stakeholders in the value chain and international institutional partners**.

28. There is a **need to improve data transparency**, in particular concerning the following: (i) Be first to publishing domestic wheat production and procurement data and forecasts; (ii) Implement surveys to measure actual stocks and consumption level (iii) Publish information on the operation of the state support programmes, like the baladi bread programme, and any changes.

29. There is also much scope for **improving active participation of Egypt in AMIS and MED-Amin**. MED-Amin could help circulate reliable data on stocks and consumption.

30. MED-Amin could **move from market analysis only to policy support**. In particular, MED-Amin could play a useful role, benchmarking and analysing policies – including trade and food policies - with an impact on nutrition, to foster diversification towards a more balanced diet and reduce obesity prevalence in Mediterranean countries, increasing the consumption of fruits, vegetables, proteins…

Mr. Arnaud Petit, Director of the International Grain Council (IGC), pointed out:

31. One of the major challenges is to monitor and anticipate markets. The major grain-producing countries have **developed very sophisticated forecasting systems** which go beyond MARS, e.g. systems operating in South America. The Mediterranean area, which will be strongly impacted by climate change, deserves more integrated and effective tools.

32. The knowledge on S&D at national level, through detailed balance sheets, and at the global level including the major market players is also critical.

33. The third challenge is to **continue improving and investing in the modernization of logistics capacities (infrastructures and organization).** The freight framework is changing, with an increasing number of larger vessels that require specific characteristics in ports. Operators and traders appeal to a more efficient and fluid interconnectivity and intermodality (transfer from port to trains), even where improvements are visible, for example in Algeria, Egypt and Morocco.

34. The region is not visible in the global market, at the exception of Algeria and Egypt. A **greater cooperation and coordination would be useful to increase the visibility and relevance of the Mediterranean in the global marketplace**. For instance, setting harmonized criteria across South Mediterranean countries for cereals public procurements would be a plus.

35. **MED-Amin could help share more accurate information on stocks, as well as geopolitical factors**. The network could help strengthen local capacities. It could produce a dashboard on the Mediterranean area, including prices, currencies, freight costs, trade, etc. Should dashboard would be an efficient tool for market monitoring and anticipation. Finally, MED-Amin could help countries develop tools for food policies targeted to most vulnerable households.

Session 4.1: The harvest forecasting: a flagship pilot activity of MED-Amin

The second half-day began with the presentation of the results of the 2020 crop forecasting exercise (**Mr. Giacinto Manfron** - JRC MARS and **Mr. David Gasc** - CIHEAM-IAMM). Beyond the three bulletins that were shared with the network, several elements of discussion were mentioned.

All the Focal points recognized that the exercise is a "proof of concept" with an increased participation since its inception in 2017. The added-value of the outlook has been improved since the last 2019 exercise thanks to:

- **The baseline statistics database** (from 2015 to 2019 data for area, yield and production at sub-national level, about 200 regions listed) used to aggregate qualitative crop conditions from regional to national scale using weighed averages of the national production, and to identify regions contributing to 90% of national crop production;
- **The capacity to identify anomalies and to follow them** until harvest thanks to the elaboration of three bulletins using crop conditions as of end of March, end of April and mid-June of 2020, published at beginning of April, end of May and end of June 2020 respectively. This follow-up was particularly relevant during this campaign for flip-flop situations for instance in France and Spain, as well as to determine with more precision crop conditions following the progress of crop development until maturity;
- **The relevance and readiness-to-use layout of the three bulletins**, with more informative and synthetic information to share, indicating at the same time a mapping of qualitative analysis of crop conditions and yield “potential”, a qualitative crop conditions outlook at national scale and at the MED-Amin (Mediterranean) level. Both regional and national pictures on crop conditions are of great interest for all national administrations;
- **Greater returns from the ground**. Exchanges and feedback from the field to Focal Points were more fluid and more consistent than in the previous exercises, although very perfectible. This helped improve the quality of data collected for the bulletins and progress towards a real-time analysis of crop conditions in targeted areas.

Further improvements are necessary to progress towards an early warning system in the Mediterranean region. Among them, we discussed and agreed on:

- the necessity to improve feedbacks from the ground in terms of data quality and timeliness (the closest to real-time), which require even more fluidity and reliance on information sharing between Focal Points and their local experts as well as between the Secretariat and Focal Points. More inclusion of hierarchy in the implementation or dissemination of the outlook (e.g. in Egypt) could facilitate access to data.
- The extension of the scope of the forecasting, including a quantitative assessment
- A broader promotion of the results of the outlook.

Comments: **Ms. Faten Raad** (LB) confirmed the interest of this exercise and of the provision of relevant information on crop conditions in neighbouring countries. She requested an easier access to the Bulletins. In the case of Lebanon, it is not possible to shortcut the access to the field observations because the feedback from the ground comes from local contacts that are farmers and are not aware of the methodology of the exercise, thus requiring extensive processing at national level. **Ms. Dalia Yassin** (EG) suggested addressing officially the analysis documents to the Agriculture Economic Affairs Sector of the Ministry of Agriculture and Land Reclamation[1] to facilitate accessing data. Also, the provision of capacity strengthening to the teams in charge of crop monitoring at the Agriculture Economic Affairs Sector could facilitate sharing of relevant data to the Secretariat. **Mr. Bergeret** (CIHEAM-IAMM) suggested merging data on crop progress and on crop harvest early outlook (forecasting) as part of the same process for a comprehensive outlook of the upcoming winter crop production. In this sense, there would be 4 monitoring times: planting (evaluated during the crop progress for Autumn), vegetative development (1st screening), flowering (2nd screening) and ripening (3rd and final screening).

<u>Milestones (indicative calendar):</u>

• ***February-March 2021:*** The partnership between CIHEAM and the JRC is continued, and the baseline statistics database is updated;

• ***March 2021:***

- Beginning of March: 1st Pre-screening of Pre-targeted Areas (PAs) in each country based on crop conditions as of 28 February, and integration into the Analysis Documents (CIHEAM / JRC), shared with the focal points (CIHEAM);
- End of March: Analysis by focal points and field experts (NB: it was decided to strengthen cooperation and exchange of information between the national and local levels) and feedback to the MED-Amin Secretariat (Focal points). Consolidation and publication of Bulletin #1 if possible during the third Week of March 2021;

• ***May 2021:***

- Beginning of May: 2nd Pre-screening of Pre-targeted Areas (PAs) in each country based on crop conditions as of 30 April, and integration into the Analysis Documents (CIHEAM / JRC), shared with the focal points (CIHEAM);
- End of May: Analysis by focal points and field experts and feedback to the MED-Amin Secretariat (Focal points). Consolidation and publication of Bulletin #2 if possible during the third Week of May 2021;

• ***June 2021:***

- Mid-June: 3rd Pre-screening of Pre-targeted Areas (PAs) in each country based on crop conditions as of 15 June, and integration into a simplified Analysis Documents (CIHEAM / JRC), shared with the focal points (CIHEAM);
- End of June: Analysis of focal points and field experts and feedback to the MED-Amin Secretariat (Focal points). Consolidation and publication of the Final Bulletin (#3) if possible during the third Week of June 2021;

• ***Evaluation and communication:*** Results and evaluation reported during the following MED-Amin meeting. Bulletins will be widely disseminated, including via social medias and MED-Amin and CIHEAM websites, *Research Gate* platform. Focal Points are intended to promote the results of this exercise within their sphere of influence.

1. Also, it was requested to provide to evidences of the MED-Amin added-value in order to facilitate the collaboration of the political level to the network activities. The Focal Points could help synthesize the added-values in their original language with the help of the Secretariat.

Sessions 4.2 and 4.3: Other MED-Amin activities and perspectives

Highlights on other MED-Amin activities were given by **Mr. David Gasc** (CIHEAM-IAMM). Despite notable improvements, the statistical data collection for the elaboration of cereals balance sheets is still a milestone to pursue. 11-year historical data are gathered (2008/09 to 2018/19) for most of the 13 MED-Amin countries. Data on 2019/20, even tentative, should be already known and shared as the corresponding marketing year ended at the beginning of the harvest in summer (winter crops) and fall 2020 (summer crops). This is not the case for most of the member countries. In 2020, the Secretariat solicited voluntary countries to work on forecasting cereals balances. In 2021, the Secretariat would like to extend it to all member states.

In parallel, difficulties remain to collect and estimate data on uses (industrial, feed, food), on stocks (often used as the adjustment variable) or food loss. Whereas the dependency on imports trends up for many countries, in particular on wheat and maize for North African countries, **a better monitoring, analysis and forecast on balance variables would help anticipate short-term needs and adequate policy measures**. The other activities were reviewed (crop progress bulletins, newsletter, communication activities, and report on covid-19).

The second and last part of the day was dedicated to the **discussion on perspectives for MED-Amin in light of the expert round-table and the first results on the survey on national needs vs MED-Amin** which was carried out in October 2020. **Ms. Elen Lemaître-Curri,** deputy director of CIHEAM-IAMM, started by reminding the main results of the 5-Y audit. Actions were already implemented following the audit recommendations. In particular, Strategic resource persons have been identified (12/13 countries), the Secretariat has been consolidated with the arrival of Elen Lemaître-Curri, seconded by France to support MED-Amin among other objectives; and a survey on national needs vs MED-Amin has been launched. The provisional roadmap to elaborate collectively the MED-Amin 2021-2022 Action Plan has been discussed and agreed:

- Nov 20: Pre-analysis of SRP and FP’s responses to the Survey
- 25 Nov 20: Expert roundtable at MED-Amin #7 meeting
- Dec 20 – Jan 21: Targeted interviews of national strategic resources persons and experts
- Dec 20 – Feb 21: MED-Amin 2021-2022 draft action plan
- Feb-Apr 21: Consultation on draft action plan and finalization
- Spring 21: Adoption at the MED-Amin #8 meeting likely in Zaragoza (Spain) during a political session

The survey on national needs vs MED-Amin gathered responses from 12 out of 13 member countries (except Malta), generally provided jointly by the Strategic resource persons and the Focal Points. Among the three groups of priorities for food security highlighted by the respondents, two are in the scope of MED-Amin:

- Secure major commodities supply: logistics infrastructures and organization, market fluidity, coordination & control of value-chains
- Facilitate consumers’ access to food; quality food for all.

A shared need for strengthening capacities of countries to make previsions (forecast), anticipate changes and crisis, and set the basis of an early-warning system was clearly noted in most responses, whether through capacity building, studies or partnerships. Current activities like the elaboration of cereals S&D balances and harvest forecasting should be consolidated and improved to pave the way for an early-warning system in the Mediterranean.

Regarding capacity building, MED-Amin has the experience to provide in 2016 and 2017 trainings in Tunisia and Algeria, in collaboration with FAO-AMIS. Further training sessions could be organized in partnership with national administrations and their crop monitoring and statistics teams and sponsors. Such trainings must focus on how to collect key data and elaborate cereals balance sheets and how to make previsions and build forecasted balances. If adequate resources can be mobilized, trainings could embrace regional/local operating teams in addition to national teams. It would also be interesting to enlarge the scope of the market information system, including on stocks, consumption and geopolitical aspects. **Mr. Marc Zribi** indicated to be ready to share, with network member countries, FranceAgriMer's experience of collaborating across departments and with the private sector on supply and demand monitoring and forecasting. The possibility to get access to CIHEAM professional training modules in line with MED-Amin objectives has been raised by **Ms. Nechaat Jaziri** (TN). Clear capacity building demand and potential could thus be identified within the network. Identifying necessary funding is a first requisite to implement those activities.

The network can also contribute to increasing knowledge on grain markets. Priority topics for studies differed between country responses (ranked below by decreasing mean priority, with countries ranking the topic first in brackets):

1. Crisis impacts and anticipation (5 /10 countries 1st or 2nd priority; PT, TR)
2. Evolution of consumption patterns (GR, MA)
3. Logistics facilities and bottlenecks (ES, FR)
4. Post-harvest food loss and waste
5. Knowledge on key regions' markets (EG, TN)
6. Optimization of the targeting of national aids and subsidies to support food security of vulnerable households (AL, DZ, LB)

It is not a surprise that **survey revealed differences between countries in the system of priorities**. While the survey provided very relevant information, further investigation is needed to clarify priorities and needs vs MED-Amin and imagine together concrete actions to implement those priorities.

The survey was beneficial to the network's life. It enabled national teams in collaboration with MED-Amin to take time to think about the added-value of the network, and what could be done better. **Further interviews will be carried out in the coming months to precise national needs** and tackle strategic issues for the countries. The Strategic resource persons will be invited to participate in those interviews, in addition to several experts. Focal Points are welcome to make recommendations in this sense.