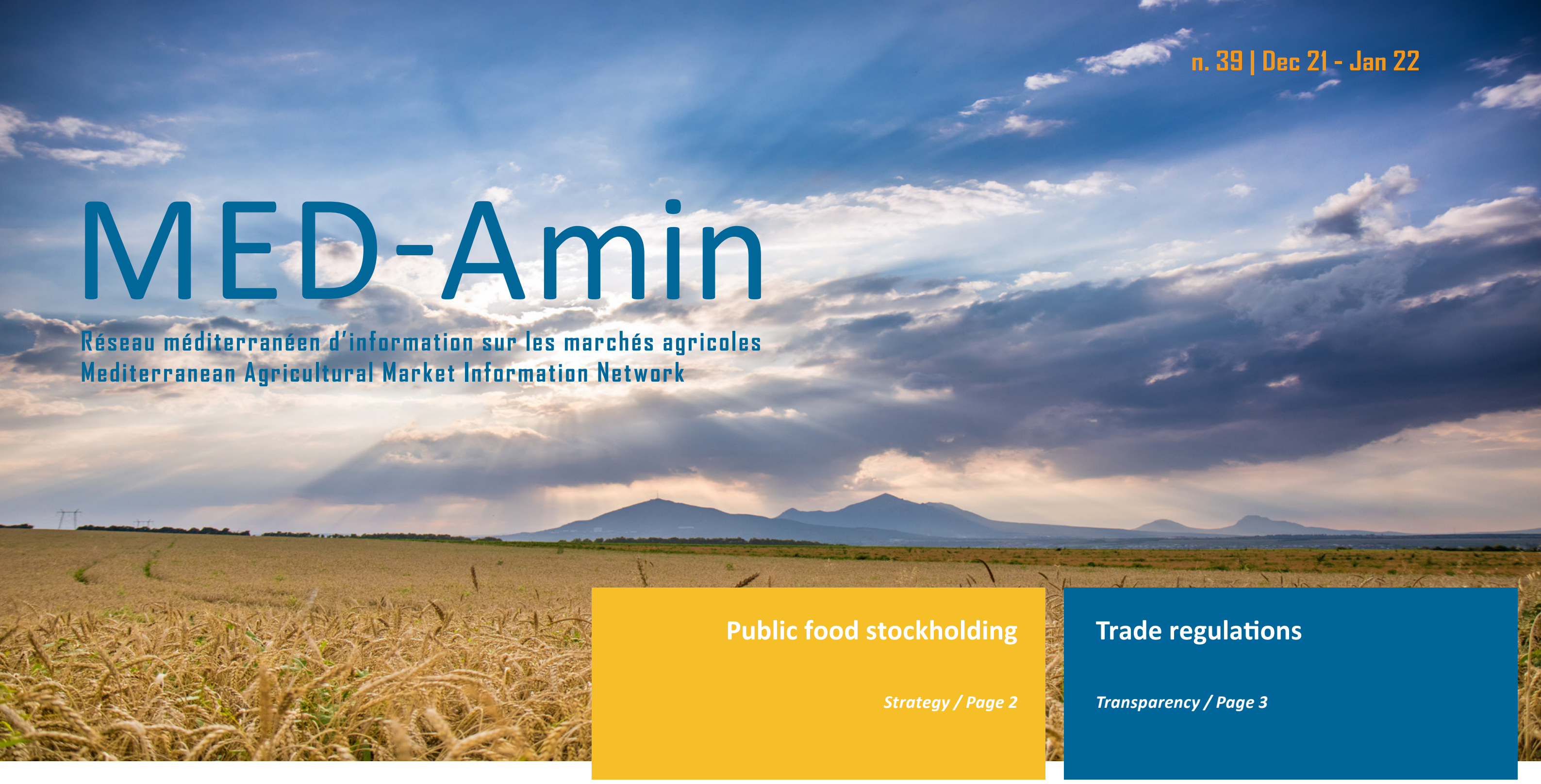

n. 39 | Dec 21 - Jan 22

MED-Amin

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

Public food stockholding

Strategy / Page 2

Trade regulations

Transparency / Page 3

Edito

The MED-Amin network is monitoring the current **winter cereals crop campaign** in the Mediterranean countries. Winter crops in most parts of Europe benefited from slightly warmer-than-usual temperatures and seasonal to above-seasonal precipitation during the review period (1 December to 15 January) according to the January 2022 issue of the JRC MARS Bulletin, a marked rain deficit extending along the Mediterranean from southern Spain to northern Italy has had no significant negative impact on winter crops so far. However, dryness is already a concern in Portugal and Spain. In northern Africa, persisting drought conditions in Morocco is already negatively impacting the development of winter crops, and rain is urgently needed to sustain adequate crop growth in western and central Algeria. As main producing regions of Maghreb countries have received little rainfall until today, dryness may already hamper somehow the next 2022 cereals harvest in Morocco, and parts of Algeria and Tunisia. The launching of **early 2022 production forecasting**, in collaboration with the JRC, will confirm this trend or not soon.

Beyond the early production forecasts, the market monitoring and analysis must integrate further indicators in order to anticipate / identify potential shortages and improve the overall food security conditions. Among the new key-drivers to incorporate are inputs market variables (fertilizers, seeds...) and freight costs. This necessary **enlargement of the scope of market analysis** was raised during the last MED-Amin Meeting (23 November, 2021), held at a critical (and timely) moment of rising agricultural commodity prices combined to energy, input and freight prices bump. And this is precisely the objective of our joint action to strengthen the early warning system in/for the Mediterranean region (MED-Amin 2021-2023 Action Plan).

Precisely, the **CIAP project** (2021-2022) will launch a study on the analysis of early warning operators to prevent food crises in the Mediterranean, with a case study on cereal markets in Lebanon and Tunisia. In particular, the study aims to: 1) Make a typology of non-conventional early warning actors on cereal value chain in the Mediterranean; 2) Analyse the warning signals that these actors use, need or can contribute to mobilise; 3) Propose a national network on early warning.

An **Ad-hoc Expert Group for early warning in the Mediterranean** (EWS-Med) has been set up and will meet on 18 Feb. It aims to:

1. Identify driving information and key elements for the building of an early warning system focusing the Mediterranean area, taking advantage of experiences from similar existing systems or projects in this domain (good practices, causes of failure) and taking into account current situation in MED-Amin countries.

2. Identify existing information which can be mobilised, and/or propose possible Partnerships to produce, complete or adapt the missing elements of information.

3. Support the elaboration of possible roadmaps and recommendations for a stepwise, cost-efficient and sustainable implementation of an EWS at national/regional level, including technical, financial and governance aspects.

No doubt that this flagship activity of MED-Amin will be particularly promoted on the occasion of the 60th anniversary of CIHEAM in 2022.

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PORTUGAL

Drought in place

(Portugal News, 26/01; Olive Oil Times, 07/02)

Portugal is facing one of the worst droughts of the last 20 years. Livestock and farming have been severely impacted. Researchers estimate that 46% of Portugal is already enduring a severe to extreme drought. The Directorate-General for Agriculture and Rural Development (DGADR) is monitoring the impacts and triggering contingency plans in the most affected areas (Alentejo Litoral, Algarve).

RUSSIA/UKRAINE

Tensions impact in MENA

(Al-Monitor, 04/02; MiddleEastEye, 09/02)

MENA countries are closely following up the ongoing tensions along the border between Russia and Ukraine, amid concerns over the supply of wheat of which they are more and more dependent, in particular Egypt. Russia and Ukraine account for 23% of global wheat trade in 2021/22 (USDA). "If the crisis continues to escalate it will negatively affect Egypt" told Mr. Abo Saddam (Egyptian Farmers Union). Tensions have already sent up global wheat prices, going up by 7% on the CME over the last two weeks. In Europe, wheat futures rose almost 6%.

MAROC

Campagne déjà pessimiste

(Le Matin, 03/02; La Quotidienne, 06/02; Bloomberg, 09/02)

Sans pluie, il n'y a ni agriculture ni croissance. "La campagne serait parmi les plus difficiles des 30 dernières années" au Maroc selon M. Sadiki, Ministre de l'agriculture. Il devient urgent que la pluie tombe d'ici 15 jours pour éviter la catastrophe. Cette situation délicate et quasiment inédite s'inscrit dans un contexte du marché global des céréales déjà tendu, ce qui présage d'une prochaine année de commercialisation encore plus difficile, mais il est encore "trop tôt pour être très, très pessimiste" selon les experts de Stratégie Grain.

VanGogh painting of cereals crop

Public food stockholding: A review of policies and practices

Extract from executive summary, FAO. 2021. Rome.

Public provision of food stocks has been a common feature of agricultural policy throughout history and in various geographical contexts. This is because promoting food security, managing price risks protecting consumers, and supporting rural incomes are **important social outcomes in any country, and addressing or mitigating the effects of market failures** that prevent the achievement of these outcomes tends to be high on the public policy agenda. While several countries had reduced or eliminated public stockholding programmes following structural adjustment measures and market liberalization in the 1980s and 1990s, these programmes regained momentum following the food price spikes of 2007/08. More recently, the expansion of food procurement and distribution operations during the COVID-19 pandemic, has also **brought into focus the role of public stocks during periods of market uncertainty**. Over a decade after the food price crisis of 2007/08, conditions on world markets are different today, providing an opportunity for renewed attention to the debate. In this context, this report aims to focus attention on the basics of public stockholding, exploring the objectives of such programmes, the policy instruments used to achieve them, and their possible market impacts. It shows country experiences in implementing public stockholding programmes and, finally, highlights the issues of the WTO negotiations related to public stockholding for food security.

Public stockholding programmes can aim to achieve different objectives, depending on the status of agricultural development in the country and the ability of producers and consumers to manage food price risks, with a range from **"Emergency stocks" to "stocks for domestic food distribution/food aid", including intermediate "buffer stocks"**. In practice, the distinctions between different types of stocks can be unclear, with countries attempting to achieve several objectives simultaneously.

In the Near East and North Africa, several countries operate agricultural policy measures that include market price support, storage, and food distribution at subsidized prices. However, because of the difficult climatic conditions and natural resource constraints, many countries tend to replenish their public stocks mainly by means of imports. In Egypt, Jordan and Tunisia, the focus is also on supporting consumers through subsidized food (typically flour and bread), by regulating the sales prices of cereals from public stocks to mills and retail outlets. In the past, public stockholding was also a common feature of agricultural policy in countries in Europe and North America. **In the EU and the US**, public stocks were mainly linked to programmes to support farm incomes and prices. With the evolving structure and growth of the agriculture sector, these policy measures also evolved towards more direct forms of income support and incentives for market-oriented production, reducing or eliminating the use of public stocks.

↪ Read the **full report**.

Caractérisation du contexte socio-économique et politico-institutionnel de la production et du commerce des céréales dans 3 pays d'Afrique du Nord : Algérie, Maroc, Tunisie (2021)

M'H. Ait Oubelli, Mémoire Master 2. Economie et management publics. Faculté d'Economie de l'Université de Montpellier et CIHEAM-IAMM, sept 2021.

L'étude, réalisée dans le cadre du projet CHANGE-UP (PRIMA), examine l'état d'adaptation de l'agriculture des pays du Maghreb et situe la culture des céréales pérennes dans différents contextes comme réponse au changement climatique. Elle a permis d'analyser dans quelle mesure les contextes économiques, sociaux, institutionnels et politiques de la production céréalière dans les trois pays peuvent favoriser ou empêcher l'adoption des céréales pérennes pour l'adaptation au changement climatique. Les résultats ont montré que les conditions dans les régions marginales apparaissent plus propices à l'adoption des céréales pérennes, et que les politiques qui ont donné lieu à la structure actuelle des céréales intensives sont un frein à l'adaptation au changement climatique. L'Etat est toujours présent comme agent économique dans le secteur céréalier dans les trois pays, même si les pouvoirs publics font preuve de libéralisme économique en impliquant le secteur privé. Les subventions à la production et à la consommation ont maintenu et amélioré la production au cours des trente dernières années, mais pas l'adaptation des exploitations céréalières. Ces exploitations céréalières prennent des mesures pour s'adapter au changement climatique avec les moyens dont elles disposent : mesures, qui renvoient parfois à des pratiques anciennes, concernant les travaux de conservation des sols et des eaux ; changements dans les pratiques culturelles; ainsi que des mesures plus modernes, telles que l'utilisation d'outils technologiques modestes pour la gestion de l'irrigation utilisant les nouvelles technologies. Certains experts et céréaliers évoquent l'insuffisance et l'inadéquation des mesures d'accompagnement des politiques publiques et la faiblesse des structures collectives.

↪ Télécharger le **rapport**

Classement des dispositifs en fonction de leur cible principale et des critère d'éligibilité (source Terra Nova). Voir article ci-dessous.

		Critères d'éligibilité et publics visés par les dispositifs		
		Dispositif ciblant les personnes en situation de précarité, avec critères d'éligibilité donnant accès sur conditions de ressources	Dispositif ciblant les personnes en situation de précarité, et élargi à tous (mixité des publics et tarification progressive)	Dispositif non ciblé
Cible d'action principale des dispositifs	Action principale sur l'accessibilité économique via la proposition d'aliments à prix réduits	Colis alimentaires - Epiceries sociales - Restaurants sociaux - Distribution de repas	- Epiceries solidaires - Paniers solidaires - Restaurants sociaux et solidaires - Groupements d'achats dans les quartiers politique de la ville (QPV)	- Supermarchés discount - Liste de courses à 21€/semaine de Leclerc - Marchés de plein vent
	Action principale sur l'accessibilité économique via un transfert monétaire	- Chèques service - Bons alimentaires - Bons de réduction - Aide en espèce		- Ticket restaurant - Restauration collective avec tarification sociale
	Action principale sur l'*empowerment* individuel	- Ateliers cuisine - Ateliers thématiques (nutrition, budget, gaspillage…) - Jardin partagé dans les QPV - Visite de producteurs		
	Action principale sur l'accessibilité physique	- Livraison d'aliments ou de repas à domicile - Camion cuisine - Distribution de repas par maraude Cuisine collective (équipement et lieu)		
	Dispositifs mixtes associant plusieurs modes d'action	- Epiceries sociales proposant des ateliers - Epiceries sociales mobiles	- Epiceries sociales et solidaires proposant des ateliers -Tiers lieux dit « nourriciers »	-Tiers lieux dit « nourriciers »

A more transparent operating environment for trade in services

Extract from Feature article of AMIS Market Monitor No. 95 February 2022.

As the year 2022 unfolds, intensive consultations are underway to reform multilateral trade disciplines in agriculture. Following the postponement of the Twelfth WTO Ministerial Conference, efforts of WTO Members will be guided by a recent state-of-play of the discussions circulated by the Chair. This detailed assessment echoes the remaining sensitivities as well as the urgent need for constructive contributions towards convergence on topics such as agricultural market access, domestic farm support, export competition and quantitative export restrictions and prohibitions.

Meanwhile, in a development much praised by the business community and also important for global agricultural trade, 67 WTO Members, representing 90% of world services trade, successfully concluded the negotiation on the Services Domestic Regulation (SDR) on 2 December 2021. Nearly a quarter of a century after its entry into force, the General Agreement on Trade in Services (GATS) is now supplemented by a set of practically oriented disciplines that address government policies affecting trade in services. Trade restrictiveness in this area typically takes the form of measures that discriminate against foreign services or suppliers as well as market access limitations, mainly quantitative restrictions. The SDR, however, specifically covers licensing and qualification requirements and procedures as well as technical standards, ensuring that the domestic processes that regulate the authorization to supply a given service are clear, predictable, transparent, and not unduly burdensome.

Services are the backbone of international trade, investment flows, economic performance and development. Efficient and affordable services in communication, transportation, infrastructure, finance, commercial banking, and insurance are essential inputs to well-functioning international markets, including commodity and agri-food supply chains. A case in point is the role of maritime shipping (e.g., freight, port, and terminal services) in global food trade. Its significance for bulk commodity trading and food security was recently brought to the limelight by the COVID-19 pandemic.

Today, agri-food supply and logistical chains continue to be exposed to severe disruptions and surging freight and trade costs, particularly affecting perishable agricultural products, with consequent spill-overs on consumer price levels and economic recovery. In this context, trade facilitation and improved infrastructure, transportation and logistics performance are all part of the solution. By addressing regulatory divergence, opaque regulations, and cumbersome procedures, the SDR will therefore contribute to the resilience of local, regional, and international supply chains.

↪ Read the **full article**.

FAO Food Index ⤴

(FAO, 03/02)

The **FAO Cereal Price Index** averaged 140.6 points in January, stable from December and 12.5% above its level one year ago. World wheat prices eased in January, down 3.1%, with increased seasonal supplies from large harvests in Australia and Argentina. However, support from continued strong demand amidst tight global availability of higher-quality wheat along with uncertainty over exportable supplies, prevented prices from declining further. By contrast, maize export prices were firmer in January, gaining 3.8% since December, mostly on concerns of persistent drought conditions in the southern hemisphere, namely Argentina and Brazil; spillover effects from the wheat market added upward pressure on maize prices. Among other coarse grains, barley quotations were slightly lower. The completion of main-crop harvests in major suppliers and purchases by Asian buyers also raised international rice prices in January by 3.1%.

TURKEY

Import strategy at risk

(HellenicShippingNews, 04/01; ArgusMedia, 28/01)

Turkish grain imports are expected to contract, despite a poor domestic harvest this year, amid steady losses of the lira against foreign currencies, along with rising inflation. However, Turkey has extended a customs tax exemption on some grains imports until the end of 2022, and switched. purchases from long-term to spot.

SCOOPS

Pour plus de news sur les marchés céréaliers, suivez le Scoop.It MED-Amin !

↪ www.scoop.it/t/med-amin

et le site web de MED -Amin :

↪ http://www.med-amin.org

Vers une sécurité alimentaire durable : enjeux, initiatives et principes directeurs (2021)

Terra Nova, nov 2021.

Dans un rapport publié par Terra Nova, sept experts traitent de la « sécurité alimentaire durable », définie comme la situation où « tous les individus ont un accès (économique, physique, social) égalitaire à une alimentaire durable de manière coordonnée et pérenne » et mise à mal par la crise sanitaire.

Le rapport envisage les limites structurelles du système actuel d'aide alimentaire, reposant en grande partie sur le secteur associatif caritatif, qui propose majoritairement des distributions de denrées. Les auteurs relèvent que les politiques publiques récentes ont associé, de manière « paradoxale », la lutte contre le gaspillage et la distribution de l'aide alimentaire, la diminution souhaitée des volumes du premier pouvant réduire la quantité des dons de denrées reçues par la deuxième. Ils soulignent également les « coûts cachés » de ce système (logistiques, administratifs, etc.), ainsi que les inégalités territoriales d'accès et de prise en charge. Dans une troisième partie, les auteurs analysent le potentiel des dispositifs existants pour promouvoir une sécurité alimentaire durable. Trois principales cibles d'action sont identifiées : i) l'accessibilité économique, ii) l'empowerment individuel, iii) l'accessibilité physique, et les dispositifs sont classés selon les critères d'éligibilité et les publics visés (figure ci-dessus). Les débats sur le revenu minimum, universel ou conditionné, et sur une « sécurité sociale de l'alimentation », sont également envisagés. Enfin, des « principes directeurs pour une sécurité alimentaire durable » sont détaillés, en envisageant tant les cibles et l'organisation du dispositif que des éléments de contexte politique. Le défi est de dépasser les réponses « curatives » avec un « dispositif universel de prévention de l'insécurité alimentaire ». Des travaux complémentaires restent toutefois nécessaires et la recherche publique pourrait appuyer l'élaboration, le suivi et l'évaluation d'un tel dispositif.

↪ Télécharger le rapport.

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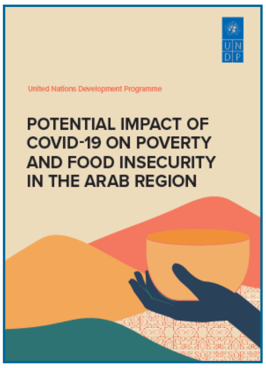
Credit: Creative Commons Licensing

Potential impact of COVID-19 on poverty and food security in the Arab region

UNDP, Dec. 2021.



The COVID-19 shock is interacting with long-lasting challenges in the Arab region. The region is characterized by low economic growth with an average GDP annual growth of 3% over the past 10 years. Additionally, the region suffers from structural deficiencies in economic policies, high poverty rate, high inequality of opportunities and unemployment (World Bank, 2020b). The pandemic is expected to exacerbate poverty. Using data from 14 non-Gulf Arab countries, Abu Ismail (2020) estimated an additional 9 million people living under $1.9 poverty line by 2021. More recently, countries such as Lebanon and Egypt witnessed massive devaluation of currency, which resulted in inflation and welfare deterioration for low-income groups. Countries in the region are net food importers, with all countries importing more than 30% of their cereal consumption. Such dependency leaves the food security of these countries, at the macro level, vulnerable to any change in international cereal prices or any disruption to the global cereals supply chain. And at the micro level, food insecurity is highly correlated with poverty.

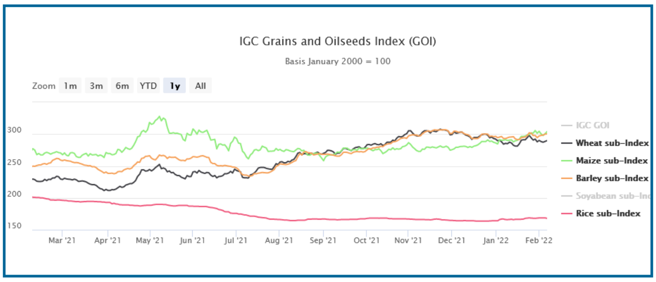
↪ Read the report here.

Global Markets: What is the Trend?

	Global Index [1] (3 Feb.)	Supply & Demand on Jan. 22 [1]: From previous forecast (M/M)	Supply & Demand on Jan. 22 [1]: From previous season (Y/Y)
Blé/Wheat	287 ↔	▲	↔
Maïs/Maize	298 ↗	▲	▲
Riz/Rice	168 ↔	↔	▲
Orge/Barley	299 ↗	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 (03/02/22) and the graph below.



Events

22 03 2022

IGC Webinar on Durum Wheat Market

This new webinar will address mainly the trade challenges. Yet in the first session, it will set the scene about the uncertainties around the durum wheat market where MED-Amin will make a presentation of the Early Warning System project.

↪ More information site Internet

05-06 04 2022

International Conference BLACK SEA GRAIN

Premiere event for the global leaders of grain and oilseed industry since 2004. Black Sea Grain 22' will take place in a hybrid format. Depending on participation package, guests will enjoy a rich in-person or online agenda and communication.

↪ More information site Internet

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International Center for Advanced Mediterranean Agronomic Studies

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