



**CIHEAM**

International Centre for Advanced Agronomic Mediterranean Studies

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**5<sup>th</sup> meeting of the CIHEAM  
member countries' Minister of Agriculture**

**Paris, 15 December 2004**

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# FINAL DECLARATION

The Mediterranean region: a special area for the production and trading of agricultural and agri-food products

1. On Wednesday 15 December 2004, the Ministers of Agriculture of CIHEAM's member states, or their representatives, met in Paris under the presidency of Mr Dominique BUSSEREAU, Minister of Agriculture, Food, Fisheries and Rurality of the French Republic, and Mr Nicolas FORISSIER, Deputy Minister for Agriculture, Food, Fisheries and Rural Affairs.
2. The Ministers and the Heads of Delegation devoted particular attention to the following subjects:
  - a) The growth and development of trade in the Euro-Mediterranean area;
  - b) The quality of raw and processed agricultural and food products ;
  - c) Rural development policies ;
  - d) New directions to be taken by CIHEAM.
3. The Ministers took stock of the demographic change and rapid urbanisation in the Mediterranean region.

The trend in aggregate demographic growth in the Mediterranean region – in the broad sense of the term, i.e. including all the Arab countries in the region) – should lead to a substantial increase in the population. The number of inhabitants is expected to rise from 500 to 700 million inhabitants over the next 25 years.

In the North of the Mediterranean we note that the number of births has stabilised and that the population has aged significantly (more than one person in two will be over 50 in 2025). In the Eastern Mediterranean, on the other hand, we find that the population is entering a phase of marked rejuvenation. Birth rates there are expected to stabilise by 2010, however, and the trend is likely to be confirmed by 2025. In the South of the Mediterranean region, the same dynamic is slow to manifest itself, and the first signs are emerging of a demographic transition that was not expected before 2025. As a result of this two-speed development nearly 60% of the Mediterranean population will live in the southern countries by 2025. By way of comparison, nearly 70% of Mediterranean consumers lived in the northern countries in 1950.

Most of the countries in the East and South of the Mediterranean will experience a sustained increase in urbanisation up until 2025, whereas urban populations in the North will tend to stabilise and in some cases even diminish.



4. Participants at the ministerial conference also took note of the dramatic change in food consumption habits within the Mediterranean area.

They highlighted five major features of this new consumption model.

- First, the demographic dynamic is affecting the age structure of populations; those of the South are remarkably youthful while those of the North are ageing. In Morocco, for example, more than half of the population is under 30 and in Egypt 40% are under 15.
  - Secondly, the feminisation of economic life means that Mediterranean women, traditionally associated with domestic life and responsible among other things for providing a quality diet, now devote more and more of their time to professional activities. Increasing numbers of women work outside the home (7% in Jordan, 17% in Algeria, 24% in Tunisia, 29% in Morocco, 43% in Turkey and Croatia) and lack of time may be at least as important as lack of income in explaining the change in domestic eating habits.
  - = Urbanisation and multi-tasking, often performed out of necessity to ensure a decent standard of living, explain the creation of nuclear families, in which the number of children continues to fall. As a result, the size of households is rapidly decreasing. In Egypt, for example, the number of persons per household fell from 5.2 in 1990 to 4.3 in 1996. In Turkey, the average number of persons per family is 3.6.
  - Lastly, work time is being reorganised. With the widespread prevalence of the no-break day and multi-tasking, there is increasing recourse to canteens, fast food outlets and street vendors. Changes of this kind play a considerable role in changing the traditional Mediterranean consumption model, characterised by the lengthy, complicated preparation of food and the special importance attached to family meals eaten at home at a leisurely pace.
  - The impact of the trend towards eating outside, which mainly affects adults, is compounded by the universal introduction of compulsory education on the lives of young people. Throughout the Mediterranean region, the collective environment is steadily taking over from that of the traditional family group – and at an increasingly early stage in the lives of individuals. In the circumstances, it is not surprising that the tastes of the young and the not so young, increasingly influenced by the development of collective catering and the effects of advertising, are tending to become westernised.
5. Ministers also analysed the increasingly rapid growth of the global market in the Mediterranean region. In 2000 world trade in goods passed the symbolic threshold of US\$6,000 billion.

For some years, the pace of historical change has been increasing in the Mediterranean, as in the rest of the world, with the development of global markets in the region continuing apace. In 2000, world trade in goods passed the symbolic threshold of 6,000 billion US dollars while trade in agricultural and food products came close to the 600 billion mark. A notable feature of the export trade in these products is its concentration, with the top ten exporting countries providing nearly two thirds of world exports in agricultural produce and processed food products. Such is the context of agricultural and agri-food trade in the Mediterranean region.



It should be noted at the outset that the weight of the Mediterranean basin countries in the world's agricultural and agri-food markets is by no means negligible; in 1995 they accounted for 23% of all imports and 19% of all exports of agricultural and agri-food products in the world. But this excellent performance masks serious disparities between the countries.

Analysed in terms of the cover rate (exports/imports), these external-trade figures reflect a very serious situation for a number of countries in the zone and problems are compounded by a degree of instability, due chiefly to climate conditions.

But the greatest cause for concern is the increasing undermining of food security status in the countries to the South and East of the Mediterranean ; such undermining has been accentuated by the appearance of such pests as acridians which have been increasing their population during these last two years in the southern Mediterranean and Sahelian countries. Whereas the overall situation to the North is improving, with exports of agricultural and processed food products growing more rapidly than imports, the exact opposite is the case to the South and East of the Mediterranean, where food deficits grow ever greater, and the countries' dependence on the world market for food is reaching alarming new levels. Leaving aside a few countries in the South of Europe, the situation as a whole has seriously deteriorated over the past thirty years and a number of Mediterranean countries have become highly dependent on agri-food imports.

Analysed in terms of origins and destinations, trade flows in agricultural produce and processed goods are highly concentrated in the Mediterranean region. Nearly half the agricultural and food imports to the South and East of the Mediterranean region come from five countries: the United States, France, Canada, Argentina and Australia.

Cereals make up a substantial part of this trade. Wheat alone accounts for a fifth of imported food products and all the main cereals taken together represent 30% of total trade, the bulk of it directed to Egypt and Algeria. This concentration on cereals probably explains the prominent place of imports from the world's major cereal exporters.

**6.** In agri-food terms there are three distinct groups of countries in the Mediterranean Region.

**The first group**, comprising the rich countries, is characterised by stagnation of demand, in volume and value terms, as a result of adverse demographic conditions and the declining proportion of the household budget allocated to food. These markets will nevertheless represent more than 60 % of food consumption in the region (in value terms) and will absorb 2/3 of its agricultural and food exports. **The second group** is made up of the poorest countries, those at the opposite extreme. Because of serious structural and socio-political problems, with which we are all-too familiar, the food situation in these countries is improving only very slowly. As a result of demographic change, food demand is expected to double in these countries by 2015. **The third group** is made up of the intermediate or market economy transition countries, whose agri-food markets are experiencing strong growth. They are in the "take-off" stage, with national income rising, and we know that the resulting situation encourages expenditure on food, one of the basic priorities of the populations. The agri-food market in these countries is expected to double in the next 15 years.



The question arising in these countries, normally referred to as transition or emerging countries, will therefore concern possible strategies for local enterprises or “cohabitation” with the multinationals, assuming that the trend towards the market economy is not called into question. One of the major consequences of this trend is accession to regional agreements and regulations.

7. In the light of these analyses and on the basis of the results of the 4<sup>th</sup> meeting of Ministers of Agriculture in Beirut on 21 September 2002, and the recommendations of the Euro-Mediterranean conference of Ministers of Agriculture in Venice on 27 November 2003, and in line with the follow-up meeting organised by the European Commission in Brussels on 23 November 2004, the Ministers made several points and a number of recommendations.
8. They viewed the food-security situation in the Mediterranean Region with great concern.

The very worrying situation regarding coverage of food requirements in the countries of the Mediterranean basin, like the basin’s high dependence on major exporting countries such as the United States, Canada, Argentina and Australia, must prompt countries in the zone to consider the strategies they need to adopt.

The cereals issue alone seems to lie at the root of the balances or imbalances identified, which raises at least two questions. The first concerns the very possibility of further growth in output in an extended Mediterranean basin – in the very broad sense – where production techniques can no longer rely on lavish use of water resources.

The second has to do with trade and assumes that the Mediterranean countries and the European Union will negotiate a trade strategy that takes account of strategic interests in the region. Research teams, private operators and national authorities in the Mediterranean basin might conduct a thorough review to promote awareness of the crucial importance of the trade issue in achieving food security in the Mediterranean.

CIHEAM is asked to develop its expertise in the analysis of intra- and extra-Mediterranean trade, strategies currently deployed and public policies that need to be set. Here again, initiatives might be taken with Ministers of Agriculture of all countries in the basin with a view to examining this matter in more depth and putting possible development scenarios on the table.

The development of the two instruments put in place by CIHEAM, i.e. the Annual Report on agricultural and food policies and the Mediterranean Observatory, will provide the means for drawing up more precisely targeted sectoral analyses and scenarios based on forward thinking.

CIHEAM will analyse trade over the period 1995-2003 in order to identify raw and processed agricultural products that are failing to reap the potential benefits of the association agreements and to check whether the problems experienced by the products are related to the production itself or the successive stages in the production chain. At the next Ministerial Conference, CIHEAM will present the results of the enquiry together with specific proposals for solving the different problems. In this respect, CIHEAM has been requested to establish a list of potential products in each country and contribute to the definition of appropriate protection systems. He could also contribute to identify potential markets to promote a fair trade of products.



Concerning the threat of acridians, which is growing in southern Mediterranean countries and directly affecting food security in those countries, it has clearly appeared that a consistent collective action is urgently needed to face this situation. All the region countries should show their determination to eradicate such a pest. To this effect, CIHEAM should play a catalytic role, notably through its research activities.

9. As regards the quality of raw and processed products, the Ministers noted that this topic covers three aspects of food-product definition.
- a) a sanitary aspect; there is a growing demand by public opinion for an adequate definition of this area of food production, especially as it relates to public health policy;
  - b) a nutritional aspect; already widely catered for in the most developed countries, but still the object of research and development work and of increasingly insistent demands on the part of consumers;
  - c) aspects pertaining to the territories and even the processes used for production, in relation to the standardisation of products.

In the coming decades there can be no doubt that public opinion, like consumers, will demand more in terms of food product quality definition and will expect closer observance of established quality criteria. The problem that will arise in an increasingly open Mediterranean area – such being the stated ambition for 2010 – is that of preventing these sanitary requirements from becoming non-tariff barriers. Such barriers would obstruct access to the large affluent markets in the North by countries in the South and gradually close some southern markets to the southern producers themselves, to the benefit of standardised goods from the agri-food industry of the North.

In this context, achieving a consensus on the problems to be overcome and cultivating a common scientific culture in the field of product quality are becoming matters of urgency for the Mediterranean basin. Research in agronomics and veterinary medicine and progress in education are turning out to be essential factors in building this common culture and providing generally recognised expertise.

From this standpoint, CIHEAM is asked to extend its provision of research, training and expertise, thereby establishing a network of all educational and research institutes in the Mediterranean basin to address this issue. “Nutrition, health and food safety” should be identified as a priority both for CIHEAM’s research and training activity and for intra-Mediterranean and Euro-Mediterranean cooperation.

CIHEAM will initiate measures to promote better knowledge of Community and partner countries’ national legislation on designation of origin and geographical indications. It will also examine the possibility of establishing a network of experts who will be responsible for geographical indications in the EU countries and the Mediterranean third countries. Such a network should provide for rapid exchange of information on changes in existing regimes and promote coordinated action.

The subject of organic agriculture was discussed at length at the Venice Conference. It will be necessary to organise a seminar to provide information about community legislation on organic agriculture and community procedure for determining equivalence between organic products from third countries; the



Commission will be asked to help organise this seminar and subsequently set up a network of competent experts or institutions that are active in the sector, both in EU countries and Mediterranean third countries. This network should provide for rapid exchange of information on changes in existing regimes on this field, ensuring coordinated action and promoting development of all aspects of the organic sector.

#### **10. Rural development addressed from two angles.**

At the previous meeting in Beirut, as at the Euro-Mediterranean ministerial conference on agriculture held in Venice on 27 November 2003, the question of rural development was addressed from two different angles

- a) in terms of the need for each of the Mediterranean countries to draw up its own rural development policies, taking into consideration the effects of urban drift, environmental degradation and territorial imbalances.
- b) as a basis for enhanced Euromed cooperation. At present rural development policies are still very tentative and depend upon cooperation between different parts of the Mediterranean basin, not only in reinforcing individual policies but also in providing a possible means of applying a territorialised approach to Mediterranean cooperation. The environmental outcomes of rural development projects should also be encouraged.

CIHEAM is asked to provide training, research and advice, so that rural development programmes suited to the very special conditions of these Mediterranean land areas might be drawn up at national, bilateral and multilateral level.

In the long run a discussion forum on Mediterranean rural projects should be set up. Here it will be possible to share the fruits of the experiments being conducted all around the Mediterranean basin, all of which are examples of the efforts by local actors to promote Mediterranean integration. The experience of successful European rural development projects could serve as a point of reference whilst ensuring the identity and specificities of each Mediterranean country. This forum should provide an opportunity to assess the results of action by local and regional communities throughout the Mediterranean basin and highlight work underway on the construction of the Mediterranean area.

In the not too distant future, CIHEAM might organise an Intra-Mediterranean seminar on development policies and their relationship to policies towards neighbouring countries and policies on Euro-Mediterranean cooperation.

#### **11. Ministers agreed on the need for sustainable management of Mediterranean fisheries and aquaculture systems**

As in many other parts of the world, aquaculture in the Mediterranean has undergone substantial development over the past few years. Total production in the region (1,349,777 tonnes in 2001, of which 53 % was fish) represents around 3% of world aquaculture production. The importance of aquaculture has just been recognised by the European Commission, which recently (October 2002) drew up a strategy document on the sustainable development of European aquaculture. The strategy was devised with the aim of consolidating the role of aquaculture, creating jobs and providing fish products in a manner that did not harm the environment. *Furthermore, appropriate planning, the introduction of regulations and support for*



the development and improvement of sustainable aquaculture methods are no longer the goals of governments alone but also of aquaculture producers.

As for coastal fishing, despite diversity and differences in the sector (different equipment and fishing methods), fishermen in the region are often faced with the same problems (coping with the legislative framework, marketing their catch, working in the same type of ecosystem, etc.). As various bodies have emphasised, this fact warrants an analysis of the sector as a whole.

Ministers therefore want CIHEAM, through its teaching and its promotion of research, to help provide the technical support needed for the sustainable development of aquaculture production systems and coastal fisheries.

**12.** The Ministers of Agriculture of CIHEAM's member countries said they expected the Centre to develop its capacities in all of these areas.

CIHEAM is expected to develop its training facilities in these areas, both for executives who are already active in professional life and for students following specialised courses. The topics referred to should be subjects for Masters degree courses and short-term courses, duly identified and identifiable across the Mediterranean region. These courses should increasingly be conducted in partnership with member countries' educational and research institutes.

In this spirit, and in order to facilitate the movement of teachers and students, CIHEAM is encouraged – and has undertaken – to standardise its educational provision as soon as possible to comply with the Bologna process, which calls for harmonisation of Bachelors–Masters–Doctorate outcome levels. In addition to providing this training and ensuring that it meets international standards, CIHEAM is expected to build up a Mediterranean system of agronomic training and research, helping to bring about a common culture and a shared body of expertise in relation to production, trade and food, security and sanitary issues in the Mediterranean.

The development of federated research programmes, deriving support from the European Union's technological research and development framework programmes, will be viewed as a special instrument for creating this dynamic. Indeed, the Mediterranean countries will be able to adopt common rules precisely because federated research programmes have already given them common references.