

HOW SECURE ARE FOOD SUPPLIES?

Food security has for obvious reasons long been a political concern. The Mediterranean region is no exception: the pharaohs already organised an extensive system in Egypt for storing harvests in order to prevent famine in periods of low river flow. The concept of security of supplies has constantly evolved. Food security was for many years assimilated to self-sufficiency for each country but was then defined as follows by the FAO in 1976: “When all people, at all times, have physical, social and economic access to sufficient, safe and nutritious food which meets their dietary needs and food preferences for an active and healthy life.” It is now no longer a question of self-sufficiency but of access for populations to foodstuffs, and that access can be ensured through production and/or trade. In the countries in the north of the basin local production contributes largely to supplies, whereas in the southern and eastern Mediterranean countries, with the exception of Turkey, supplies are provided to a very large extent through trade and even in some cases through food aid. The balance of calories produced and calories consumed in each individual country shows that the South needs to use external supplies to a very large extent in order to reinforce food security. These State-level considerations must not hide the fact that even when adequate supplies of food are available this does not necessarily guarantee that every individual has access to food. That access depends mainly on each individual's economic and social capacity, as Amartya Sen theorised when observing famine phenomena.

IMPORTS AND SUBSIDIES IN THE SOUTH

It was thought that the risk of food insecurity would decrease at the beginning of this century as the result of trade, at least in this region of the world. But the “hunger riots” which

broke out in 2007 and 2008 were an unfortunate reminder of how fragile food supplies still are in certain countries. Egypt and Morocco have been the theatre of uprisings that have revealed the precarious state of affairs, despite the fact that these essentially urban social movements have been limited compared to what has happened elsewhere in the world. Mechanisms for subsidising staple foods are the result of food policy choices intended to secure internal stability: in Algeria they concern bread, flour, semolina, milk and oil; in Tunisia only three lines of product are subsidised – milk, bread and flour; in Morocco only sugar and an annual quota of 1 million tonnes of common wheat receive State aid; and in Egypt the prices of bread and flour are fixed and accessible to the entire population of the country, whereas rice, sugar and oil come under a food coupon system, in which consumer subsidies are means-tested. Although these systems have had their weaknesses in certain areas to the extent that uprisings have occurred, they are nevertheless efficient, if costly; the recurrence of crises could eventually become a serious problem, particularly if the agricultural trade balances continue to deteriorate in the southern and eastern Mediterranean countries.

Critical dependence on cereal imports. Despite the efforts to modernise farming (water resource development policy, land improvement), output cannot keep pace with the needs of a rapidly growing population, so that the deficits in the South and East are growing. The scarcity of natural resources (land and water) is aggravating this situation, particularly in Algeria, Egypt, Morocco, Tunisia, Lebanon and Jordan. Cereals account for the largest volumes of imports. This trend is of course connected with dietary patterns in the southern and eastern Mediterranean countries, but also with

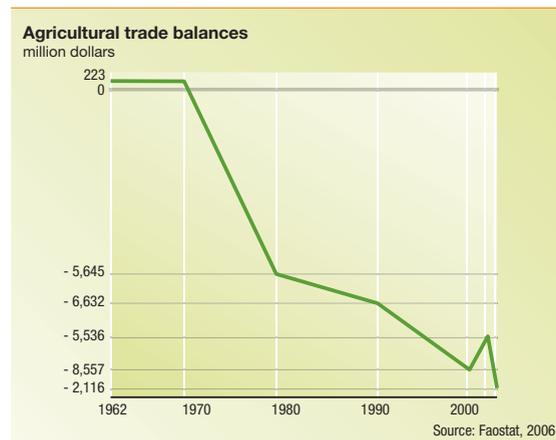
the fact that developing the share of animal proteins in daily food intake increases cereal needs tenfold (approximately 7 plant calories are needed in order to produce one animal calorie). The North African countries (from Morocco to Egypt) are very dependent on cereal imports: in 2007-2008 they absorbed almost 19% of world wheat imports, whereas they account for only 2% of the world population. This dependence is steadily growing.

FOOD AID IS DIMINISHING BUT THE PRICE RISK REMAINS

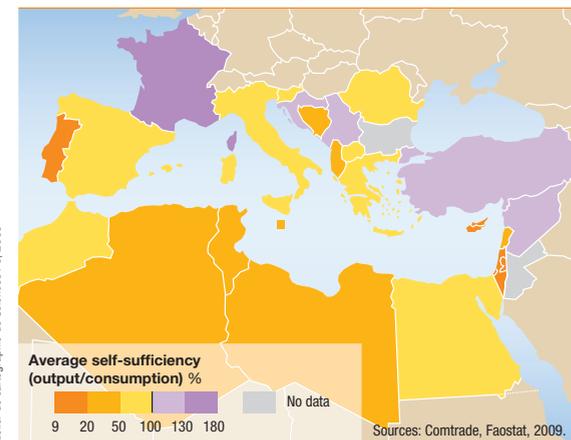
It is interesting to observe, however, that this growing food dependence is not accompanied by rapid development of food aid. The opposite is even the case, since food aid has been decreasing sharply since 1990 in regions where the levels of aid have sometimes been high. This contraction is connected with the political stabilisation of the region (the end of the war in former Yugoslavia and Lebanon, but also the fact that planning, which had little incentive effect in Albania, has been abandoned), and it must be borne in mind that in the 1980s food aid served as a means of dumping for the United States, which was keen to win back market shares from a Europe that had developed a food surplus. These mechanisms of direct export aid have meanwhile been prohibited in the WTO context. Although food aid has decreased sharply it is nevertheless still considerable in the Palestinian Territories (for geopolitical reasons) and in Mauritania (where the motives are political and economic). Despite this decrease in food aid it must be borne in mind that the southern and eastern Mediterranean countries are very dependent on agricultural imports: they seem to be more in a position to obtain food through trade, but on condition that wide variations in the prices of agricultural

commodities do not make those commodities inaccessible for the most vulnerable countries. The main risks are budget risks. From the food security point of view, the risk is primarily nutritional, since the populations tend to buy subsidised products to cover their calorie needs – to the detriment of a balanced diet. Furthermore, the development of illegal trading hits the poorest population segments hardest. It is already observed that undernourishment has increased sharpest in North Africa and the Middle East since the beginning of the millennium (13.5%). Given this reality it is imperative that solutions be found at the local, national, infra-regional (Maghreb) and regional (Mediterranean or even Euro-Mediterranean) level. There are many different means of taking action ranging from creating strategic stocks to opening up the remotest regions. ■

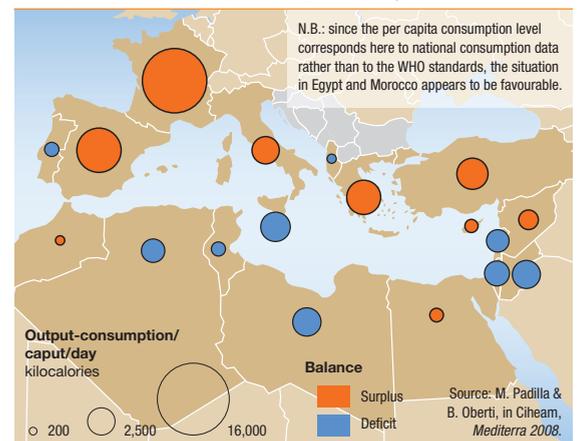
SEMC AGRICULTURAL BALANCES, 1962-2004



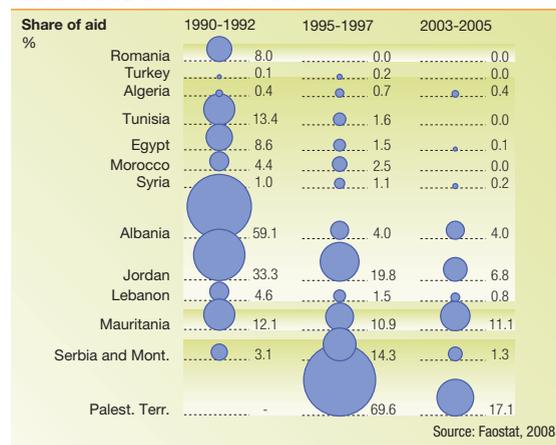
CERERAL SELF-SUFFICIENCY, 2000-2007



PER CAPITA FOOD SURPLUS/DEFICIT, 2004



AID IN FOOD CONSUMPTION



NET CEREAL IMPORTS, 1963-2003

