Organic farming in the Mediterranean partner countries

Al Bitar L.

in

Al Bitar L. (ed.).
Report on organic agriculture in the Mediterranean area: Mediterranean Organic Agriculture Network

Bari : CIHEAM
Options Méditerranéennes : Série B. Etudes et Recherches; n. 50

2004
pages 7-15

Part I

ORGANIC AGRICULTURE

IN THE MEDITERRANEAN PARTNER COUNTRIES

ORGANIC FARMING IN THE MEDITERRANEAN PARTNER COUNTRIES

Lina Al-Bitar
Mediterranean Agronomic Institute of Bari (CIHEAM-IAMB),
Via Ceglie, 9 - 70010 Valenzano (BA), Italy

GENERAL INTRODUCTION

Agriculture in the Mediterranean presents a great diversity between the EU- and the non-EU countries, although they have, in productive terms, similar properties for the “Mediterranean climate”. Differences are related to various aspects: (i) a different economic relevance of the agricultural and agri-food sectors on the overall economy of the country; (ii) a diversified weight of the agricultural workers on the total working population; (iii) a different capacity to access financial resources for new investments; (iv) a different availability of water resources; (v) a different ability to access the knowledge resources and (vi) a different role of agriculture (CIHEAM, 2000).

The two shores of the Mediterranean differ also in terms of their economic development. The trade flows between the Community and the non-Community countries are in favour of the former: over time, the structure of such trade flows has been strongly influenced by the agricultural policy of the EU and strongly affected by periodical “bilateral agreements”, that establish conditions and import quotas in trade flows. As envisaged by the Barcelona Declaration of the 28th November 1995, the Euro-Mediterranean shared prosperity will be reached by the year 2010, through the establishment of the “free trade” zone between the EU and the Partner countries.

The Euro-Mediterranean dialogue on agricultural cooperation has finally started eight years after the Barcelona Declaration as proved by the Euro-Mediterranean ministerial conference that took place in Venice on the 27th of November 2003, entirely dedicated to agriculture focusing in its work programme on three main areas: rural development, quality of agricultural products and organic agriculture (Lacirignola, 2004).

Organic farming, in the last years, has continuously attracted much interest and consent, both in demand and supply, and by now it involves quite all the Mediterranean countries.

However, differently from what has occurred in Europe, the development of organic farming in the Mediterranean is taking place solely for market reasons, stimulated by the high demand for products from the EU, the USA and Japan.

In fact, the major organic holdings are owned or “controlled” by large firms or foreign multinationals that, of course, produce to export without triggering local development.

Moreover, in the Mediterranean countries in general (except very few cases), there is a lack of national or regional support policies to farmers, both in direct and indirect forms, aimed at favouring conversion to organic farming.

Besides, on the south-eastern shore of the Mediterranean, co-ordinated interventions that may support the development of organic farming are lacking. Few initiatives are undertaken in different sectors, ranging from training and extension to experimentation.

Also from the point of view of marketing and distribution, a lot has still to be done. In particular, strengthened distribution network and more capillary information are basic prerequisites to allow the potential organic product consumer to effectively meet his requirements.

STRUCTURAL ASPECTS

Over the last years, organic agriculture has attracted much attention in the Mediterranean countries for both environmental reasons and market opportunities. In fact, the Mediterranean region is a worldwide important market for agricultural products and foodstuffs, in particular to the European countries.

Organic agriculture was introduced in the Mediterranean area more than 20 years ago by some foreign private companies looking for new investment opportunities in Morocco, Egypt, Turkey and Tunisia.

Nevertheless, expansion of this activity to the whole region was quite slow until the year 2000. Thereafter, a rapid growth has occurred. Today, the concept of organic agriculture has gained much attention in almost all the Mediterranean partner countries (table 1) that have been stimulated by two factors: (i) the progressive interest of the European stakeholders that have moved more and more to the South to meet the growing demand of the North-European consumers and (ii) the interest for new commercial opportunities identified by local producers.

Table 1. Organic land area (ha) and farms' number in the Mediterranean partner countries. (present publication, country reports; *Abd El Moity, 2003; §Telmat and Hadjeres, 2003; £ Al-Damarat, 2004)

Country	Farms (no.)	Organic area (ha) (certified and in conversion)
Albania	60	192.3
Algeria	n.a.	1 400§
Cyprus	150	500
Egypt	500	17 000*
Israel	400	5640
Lebanon	164	758
Jordan	4	7.25£
Malta	20	14.45
Morocco	12 051	20 040
Syria	2	260
Tunisia	580	33 500
Turkey	13 044	103 190

Over the last few years organic farming in the South has been very vital, as shown by the strong growing trend of surface areas (Table 2), originated undoubtedly by market phenomena but also by the evolution of the local agricultural policies, increasingly sensitive to environmental sustainability and production upgrading.

Table 2. Comparison of organic land area (ha) in the Mediterranean partner countries between 2002 and 2004. (Al-Bitar L. (Ed.), 2002; present publication, country reports; *Abd El Moity, 2003; §Telmat and Hadjeres, 2003; £ Al-Damarat, 2004)

Country	organic area (ha)	
	2002	2004
Albania	4	192.3
Algeria	-	1.400§
	166	500
Egpyt	4.167	17.000*
Jordan	-	7.25£
Israel	5.000	5.640
Lebanon	300	758
Malta	-	14.45
Morocco	11.956	20.040
Syria	-	260
Tunisia	15.035	33.500
Turkey	44.532	103.190
Total area	81.160	182.484

However, one of the major weaknesses of the Mediterranean organic agriculture is the lack of statistics. In fact, it is not easy to find reliable data on the present state and spread of organic agriculture in the Mediterranean basin.

In order to respond to the growing information needs on organic agriculture in the Mediterranean area and to start monitoring the growth trend of this sector, the Italian offshoot of the International Centre for Advanced Mediterranean Agronomic Studies (CIHEAM-IAMB) started up in 1999 a Mediterranean Network on Organic Agriculture (MOAN) (www.iamb.it). A preliminary objective of MOAN was to gather detailed data on organic agriculture in the CIHEAM-member states (Albania, Algeria, Egypt, Greece, Italy, Lebanon, Malta, Morocco, Portugal, Spain, Tunisia and Turkey).

Subsequently, much attention has been given to the Mediterranean Partner countries where statistics monitoring the growth trend of this sector are lacking and where a real need of information on the situation of organic agriculture really exists. Therefore, it was decided to focus the work of MOAN mainly on the Mediterranean Partner countries member of CIHEAM and to enlarge it to the other countries of the South-East shore in order to cover all the area.

Based on the analysis of the economic fallout of organic agriculture in each single country, it was tried to reconstruct the economic weight of the whole sector, to cast light on the major technical, agronomic, legal and market issues, on the institutions dealing with education, research and experimentation and to get acquainted with the activities carried out by agencies and organisations operating in this sector.

The first report (Al-Bitar L. (Ed.), 2002) was intended to give a major contribution to help national and international institutions understanding the phenomenon and bringing up proposals and initiatives for the development of organic agriculture in the Mediterranean.

In this new edition, new countries (Israel, Syria and Jordan) have been introduced.

A comparison between data of 2002 and 2004 shows a strong growing trend of the organic area in the Mediterranean countries (Table 2), with an increase of about 125% of the total area. Besides, it shows that this activity has been expanded to new countries in the last two years.

Nevertheless, substantial differences still exist between Southern Mediterranean countries in terms of importance of the organic sector (figure 1). Turkey is the leading country with more than 50% of the organic land area, followed by Tunisia, Morocco and Egypt. The newly emerged countries still to be far away from the most advanced ones, but are very promising in that important steps are being done in a short period.

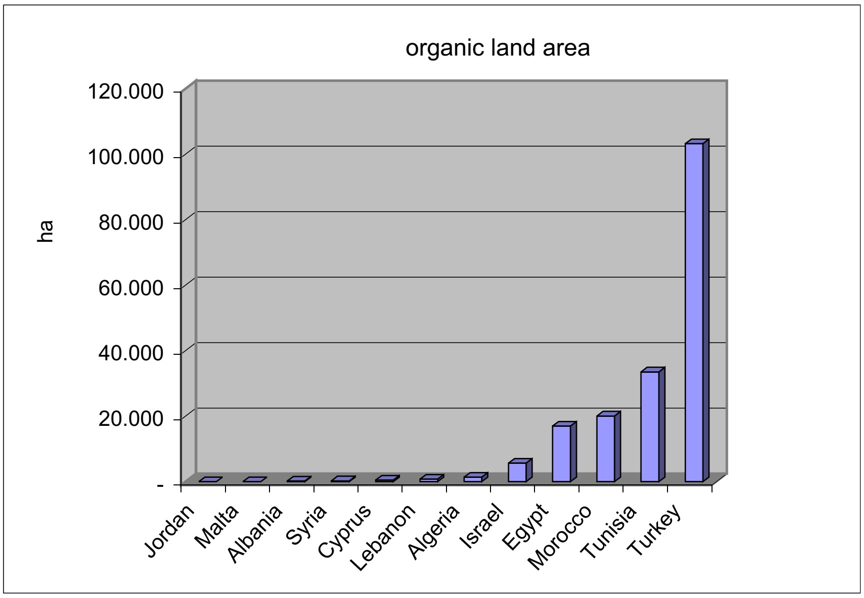

Figure 1. Organic land area (ha) in the Mediterranean partner countries.

Difference also exists between the EU- and the non-EU Mediterranean countries. In fact, the share of the non-EU countries represents only the 7% of the total Mediterranean organic area (figure 2).

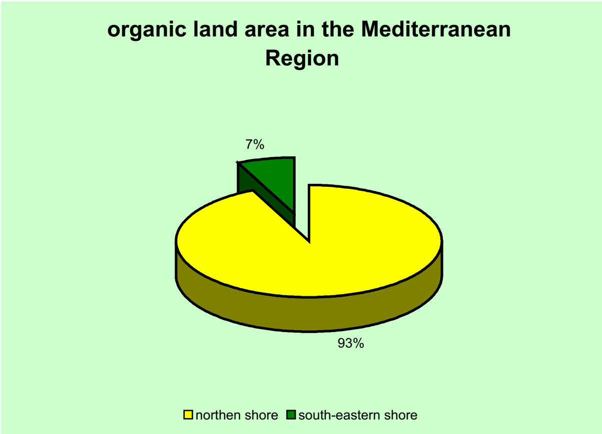

Figure 2. Share of the non-EU countries over the total organic area in the Mediterranean in percent. Data on European countries are taken from Willer and Yussefi, 2004

Nevertheless, this share despite being so small, has almost doubled in the last two years (Al-Bitar, 2002) and seem to increase in the future.

MARKETING ASPECTS

Domestic market and exports differ markedly from country to country in the Mediterranean. However, generally speaking, in the absence of local market and national labelling systems in most of these countries, organic food is primarily oriented towards export. 85% of the produce is destinated to foreign markets such as EU countries, USA Japan and Gulf.

However, the development of the domestic market is getting started. In fact, in many of these countries health or specialized shops are being opened, some supermarkets started introducing organic shelves. Besides, local fairs where organic farmers may sell directly their products are increasing. Nevertheless, in many other cases, organic products are sold as conventional or as typical products because of difficulty of marketing.

The main organic products of the Mediterranean partner countries sold in Europe are listed in table 3.

Table 3. main Mediterranean commodities exported to the EU and their country of origin

Crop/commodity	Exporting country
horticultural crops	Israel, Morocco, Tunisia and Egypt
tubers	Israel, Algeria and Morocco
citrus	Morocco
fresh fruits	Israel and North African countries
dried fruits	Egypt, Morocco, Tunisia and Turkey
olive oil	Tunisia
medicinal and aromatic plants	Morocco, Tunisia and Egypt
honey	Algeria and Tunisia
cotton	Egypt
processed products	Turkey

REGULATORY ASPECTS

The legal framework (table 4) differs from one country to another and it evolved notably in the last two years. Until the year 2003, very few countries had a national legislation (only Tunisia and Turkey).

Despite too many years have passed from the beginning of the organic movement in Egypt, Israel and Morocco, these countries have not yet developed a national legislation. Only very recently, a draft regulation in Morocco has been prepared and is still waiting for the final approval. In Israel a first draft of the law was accepted by the Parliament, and has to be completed by the end of this year.

An opposite situation is present in Albania, Malta and Lebanon where organic agriculture is almost new and national regulations have been already approved, or are being approved only few months after their submission like the Lebanese case.

Certification in all Mediterranean partner countries is done mainly by foreign organizations (except Israel where all are local). Some local certification bodies are operating in Albania, Turkey and Egypt, or are under approval like the case of Malta.

Table 4. Regulatory framework and certification bodies in the Mediterranean countries

Country	National regulation	Number of certification bodies	List of certification bodies
Albania	yes	1	OAA (local)
Algeria	no	1	ECOCERT (French)
Cyprus	yes	1	LACON (local)
Egypt	no	4	ECOA (local) COAE (local) IMC (Italian) BCS (German)
Israel	Draft accepted. Final submission end 2004	3	Agrior (local) GMP (local) PPIS (local)
Jordan	no	-	-
Lebanon	Draft submitted. Approval by 2004		IMC (Italian) Skal (Dutch) Qualité France (French)
Malta	yes	0	MSA (local)
Morocco	Draft submitted waiting for approval	3	QUALITE FRANCE (French) ECOCERT (French) GfRS (German)
Syria	no	1	ECOCERT (French)
Tunisia	yes	4	ECOCERT (French) LACON (German) BCS (German) IMC (Italian)
Turkey	yes	7	ETKO (local) EKOTAR (local) BCS (German) ECOCERT (French) IMO (Swiss) SKAL (Dutch) ICEA (Italian)

Support policies

Policies supporting the organic sector are still lacking in many countries. Only Tunisia, Malta and Cyprus subsidize directly organic farmers through financial aids.

In Turkey and Israel indirect support and incentives are given; reduced loan interest (Turkey), support for training and data collection (Israel). Some new-entry countries like Syria are already elaborating some support strategies.

RESEARCH, EXTENSION AND TRAINING

No real organic research is being undertaken, except in Turkey and Israel where research is also supported by the Ministry of agriculture.
In most of the countries, research is being conducted by the organic associations and is carried out on-farms.

The Mediterranean agronomic institute of Bari (IAMB) promotes comparative research in different Mediterranean countries through its Master mobility programme and its network MOAN.

Training is mainly vocational provided by associations and extension services. Only in Morocco, Tunisia and Turkey academic training is given at graduate and post-graduate level.

IAMB grants scholarships to citizens coming from Mediterranean countries to attend the post-graduate and Master course in Mediterranean organic agriculture (www.iamb.it) that it runs since 1999, and organizes special sessions of short training in some of these countries.

MILESTONES IN THE HISTORY OF ORGANIC AGRICULTURE IN THE MEDITERRANEAN

1977: beginning of organic farming in Egypt: SEKEM lead the way;

1980s: organic farmers in Israel after 10 years of unsuccessful attempts founded the Israeli Bio-Organic Association (IBOAA) that was behind the development of the sector in Israel;

1980s: organic agriculture starts in Tunisia with private initiatives;

1984-1985: development of organic farming in Turkey as a consequence of the growing organic market in Europe;

1986: beginning of the organic movement in Morocco by some citrus growers with French support;

1990s: organic agriculture starts in Lebanon pushed by the need to find solutions to face the excessive use of chemicals in agriculture;

1994: Turkey establishes its own regulation;

1997: foundation of organic agriculture association (OAA) in Albania;

1999: issuing of the Tunisian regulation and foundation of the Maltese organic agriculture movement (MOAM);

2000: beginning of the organic movement in Algeria and foundation of the organic farming unit in Malta at the Ministry of agriculture;

2001: foundation of the organic farming society in Jordan at the Ministry of agriculture; in the same year, the first symposium on organic agriculture took place in Morocco; National regulation approval in Cyprus;

2002: establishment of the national unit for control and certification at the Ministry of agriculture in Algeria;

2003: foundation of the organic committee in Syria;
in the same year, the first Arab Conference on Organic Agriculture took place in Tunisia, followed by different other initiatives in the region showing the great expansion of the sector. One of these initiatives is the foundation of the Middle East Natural Products Expo organized every year in Dubai (www.globallinksdubai.com)

2004: approval of new legislations in Albania and in Malta.

COUNTRY SPOT

Albania

Organic agriculture started in Albania only in 1997 when the organic agriculture association (OAA) was founded. Nowadays, OAA still to be the only institution dealing with the organic movement and has been carrying on a series of initiatives, from training to research, from framing policies to certification. The organic sector in Albania has evoluted consistently. From an organic area of 4 ha in 2001 (Ferruni, 2001), Albania counts now almost about 200 ha. In 2004, the Albanian Parliament approved the organic law. The next step will be the set up of a national policy to support the further development of the sector.

Algeria

The first attempts to introduce organic agriculture in Algeria started in 2001 with some awareness activities strongly supported by the Ministry of Agriculture. The estimated organic area according to the statistics of the National Office for Marketing of Vines and Wines Programme is around 1400 ha (Telmat and Hadgeres, 2003). A national unit for control and certification of organic products was established at the Ministry of Agriculture in 2002, and is in charge of training and extension, and the elaboration of regulation and the establishment of certification system.

Cyprus

Legislation was approved in 2001. The competent authority for data collection is the Agricultural Research Institute. Certification and inspection are done by local bodies. The national action plan forsees subsidies for both plant and animal production.

Egypt

Organic agriculture started in Egypt thanks to a German-based initiative. Certification schemes were first introduced twenty years ago to meet the requirements of foreign importers of medicinal plants (El-Araby, 2001). Inspection is both local and foreign. Still no national regulation and support policy are present; nevertheless, this lack has not hampered marketing of organic products. In the future, following the completion of the free trade zone and the expansion of the local market, this regulatory gap may become a stumbling block.

Israel

Organic agriculture started in Israel some thirty years ago (Adler, 2001) but did not have resounding success. About twenty years ago the Israeli Bio-Organic Association (IBOAA) was founded. IBOAA was behind the development of the sector, and the rapid expansion of export to Europe. A special department of the Ministry of Agriculture is in charge of certification of products for export. Israel is the only country where inspection and certification are carried out by local bodies. Both local and export markets are well developed. A first draft of the organic law has been approved by the government but still to be completed by the end of2004.

Jordan

In Jordan, the organic sector is quite new, but it seems to be moving further rapidly. Organic agriculture started in Jordan in 2001 when the organic agriculture unit was established at the Ministry of agriculture (Zaabi, 2003). This unit is in charge of training, data collection and represents the whole sector. Different initiatives are being undertaken by the private and the public sectors. The total organic area is about 7 ha. In 2003 the Jordan Agricultural Engineers Association founded the organic farming society (Al-Damarat, 2004).

Lebanon

Organic farming in Lebanon developed about ten years ago in response to the mismanagement and un-sustainability of the agricultural sector after the war. It initiated thanks to private and NGOs initiatives.

Different activities were set up to promote the development of the local market. A national regulation has been already submitted to the Authorities to be approved within 2004 that foresees, among the other activities the establishment of a local certification body. Only in the last two years, the organic area has increased notably from 185 ha in 2003 to 758 in 2004.

Malta

The Maltese Organic Agriculture Movement (MOAM) was founded in 1999 (Calleja, 2001) by some individuals who were attempting to create awareness towards organic. Its mission consisted in promoting training and research, advocate standards and certification schemes, foster rural development, boost marketing and help local farmers to become familiar with the organic production method.

Upon it's entry in the EU, the organic sector in Malta has greatly developed. A national regulation was set up and a national competent authority established within the Ministry of Agriculture is now supporting the sector at all levels: economic, technical, social, etc.

Morocco

Morocco is one of the first Mediterranean countries that has started the organic production. Nevertheless, the country still lack a national regulation, even though attempts were launched in 1992 and a draft has been prepared. This did not create an obstacle for organic farmers and organic area has reached in 2004 about 20.000 ha. The country presents high potentials that should be supported and enhanced by a national strategy that is still lacking.

Syria

Organic farming in Syria is in its infancy with only two farms over an area of 260 ha. Nonetheless, the Syrian government shows a great interest in this sector and intends to fully support it. In fact, in 2003 the organic agriculture committee was established and is expected to prepare a national strategy to support the organic sector.

Tunisia

Organic agriculture started in Tunisia in the middle of the eighties by private initiatives and evolved slowly until 1997. The last years were characterized by a high increase in the organic area (that reached about 35.000 ha) due to the consistent support given by the government underlined in a national strategy. In fact, Tunisia was one of the first Mediterranean countries that elaborated a national law issued in 1999. Tunisia, is the first country subsidizing organic farmers in different ways: through direct support reaching the 70% in the case of certification, or different forms of incentives like tax reduction, exemption of VAT, etc..

Tunisia, was the first country that has introduced training on organic production at academic level.

Turkey

In Turkey, organic farming started in the middle of the eighties. The national regulation was set up in 1994. The competent authority is the Ministry of Agriculture that is responsible for the overall management of the sector. Turkey is the sole Mediterranean country that has designed an official body to collect statistics. No subsidies are given to farmers, only some forms of incentives are offered. Research and training are also supported by the Ministry and are carried out at the different institutes of the Ministry in 81 provinces and at the Universities. Turkey has applied to the EU to be accepted as a third country in 1995 and has renewed the application in 2003 after the revision of its regulation.

FUTURE PERSPECTIVES

Heterogeneity and unreliability of data, difficulty in finding statistical information, lack of training and technical know-how, insufficient research and support policies, problems of equivalency in regulations are facing the growth of O.A. in the Mediterranean partner countries.

Nevertheless, organic farming may represent an important opportunity for the development of the agricultural and economic sectors of these countries, the creation of important new job opportunities and the preservation of natural resources.

Moreover, organic agriculture should be regarded as a potential tool for the strengthening of the Euro-Mediterranean relationships; in fact, it is one of the priorities of the Euro-Med cooperation in agriculture, as reported by art 16 of the conclusions of the Euro-Med Ministerial conference on agriculture of Venice (2003) (Lacirignola, 2004): “the community has played a leading role in determining the legislative aspects on organic farming …, and could share know-how and experience in this field with its Mediterranean partners”.

In fact, equivalent juridical framework by creating harmonized and shared rules and norms should be developed. Different actions should be undertaken such as the creation of databases for the collection and diffusion of information, Institutional capacity building and activities of research and experimentation.

A Key strategy should require the Mediterranean partner countries to work on the valorization of their agricultural and industrial production to put on the market high quality products that should be complementary and not competitive to the European ones.

REFERENCES

Abd El Moity T.H. (2003). Situation of organic farming in Egypt and substitutes of synthetic chemicals. *Proceedings of the Arab conference on organic agriculture for a better environment and stronger economy*, Tunis, September 27-28, pp. 35.

Adler, U., (2001). Israel: organic systems lead the way. *Ecology and Farming, 28:11.*

Al-Bitar L. (Ed.) (2002). Report on Organic Agriculture in the Mediterranean Area Mediterranean Organic Agriculture Network, Options Méditerranéennes, Series B: N°40, CIHEAM- IAMB, Bari.

Al-Damarat, R., (2004). Situation of organic agricultural in Jordan. Personal communication.

Calleja A. F. (2001), Malta. The first organic steps for a small island state. *Ecology and Farming, 28:10.*

CIHEAM, (2000). *Rapport Annuel 1999*. Paris.

Ferruni L. (2001). Albania: a challenge to the country's agriculture. *Ecology and Farming, 28:16.*

Lacirignola C., (2004). Eight years after Barcelona dialogue has begun. Greenmed, the Mediterranean fresh produce magazine. 01/2004, pp. 26-31.

Telmat R. and Hadjeres N., (2003). Actual situation of organic agriculture in Algeria. *Proceedings of the Arab conference on organic agriculture for a better environment and stronger economy*, Tunis, September 27-28, p. 36.

Willer, H. and Minou, Y. (2004). *Organic Agriculture World Wide. Statistics and Future Prospects*. Dürkheim. Stiftung Oekologie & Landbau.

Zaabi, K., (2003). Organic agriculture in Jordan: natural production and safe food. *Proceedings of the Arab conference on organic agriculture for a better environment and stronger economy*, Tunis, September 27-28, p. 36.