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Organic Farming in the Mediterranean

Vincenzo FERSINO

CIHEAM – Istituto Agronomico Mediterraneo Bari[1]

n the last five years, interest and consent on organic farming have continuously increased, both in demand and supply, and by now it involves all the Mediterranean countries. However, the application of the organic production method is not the result of improvisation or the return to traditional techniques, rather it requires huge investments in knowledge oriented to production and conservation techniques, and compliance with the regulations in force. 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.

Based on the data collected in the Mediterranean region by MOAN, there are about two million hectares under organic farming (CIHEAM-IAMB. MOAN, 2002). The farms that have adopted this new production method amount to more than 100 000 (table 1).

Table 1 – Organic Farming in the Mediterranean Region (2001)

Countries	Farms (N°)	Surfaces (Ha)	Organic Farms/ Total Farms	Organic AA/ Total AA
Italy	51.552	1.069.339	1,91	7,21
Spain	13.724	388.031	1,20	1,60
France	10.400	420.000	1,60	1,50
Portugal	763	57.771	0,18	1,31
Greece	5.270	24.800	0,64	0,71
Total EU Mediterranean Countries	**81.709**	**1.959.941**		
Turkey	18.375	57.002	0,10	0,15
Tunisia	245	16.818	0,03	0,19
Morocco	555	11.956	0,01	0,04
Israel	n.d.	7.000	n.d.	1,25
Slovenia	620	5.200	n.d.	0,66
Egypt	300	4.167	0,01	0,13
Lebanon	17	250	0,01	0,07
Cyprus	15	52	0,01	0,04
Albania	8	4	n.d.	0,00
Total non-EU Mediterranean Countries	**20.135**	**102.449**		
Total Mediteranean Regioı	**101.844**	**2.062.390**		

Source: IAMB-MOAN

[1] Vincenzo FERSINO – Coordination Committee Organic Agricolture
C.I.H.E.A.M. – IAMB Via Ceglie 9, 70010 Valenzano (BA) Italy.
E-mail: fersino@iamb.it; Web site: www.iamb.it

Actually, over the last few years organic farming in the South has been very vital, as shown by the strong growing trend of surface areas, originated undoubtedly by market phenomena but also by the evolution of the local agricultural policies, increasingly sensitive to environmental sustainability and production upgrading. In particular, the country with the highest organically grown area is Turkey, followed by Tunisia and Morocco.

The relative weight of the Southern Mediterranean countries with respect to the whole Mediterranean region is still low but the growth rates experienced, over the last few years, by some of these countries suggest a fast and considerable development of the sector.

In the South-eastern Mediterranean countries the consumption of organic food is in its infancy with the exception of Egypt where organic products are sold in more than 7000 pharmacies and 3000 shops (Geier, 2001). In some capital cities shops and supermarkets have started to sell organics, but the local community is neither informed nor aware of the existence of these products (MOAN, 2002). Domestic markets and export potential differ markedly from country to country.

In Albania (Ferruni, 2001), agriculture has undergone radical changes over the past decade. The State farms averaging some thousand hectares each have been fragmented into small farms of 1-2 ha in size. The current economic recession does not allow for fresh investments nor for the purchasing of machinery or chemicals which are imported at sky-high prices. Except for a few farms which make use of synthetic chemicals, the vast majority of farms adopt a method of production which can be generally regarded as “organic”. Hence, Albania is a breeding ground for organic farming as the country can capitalise on the experience gained in the use of chemical-free production methods. In June 1997 the Organic Agriculture Association was founded by some Albanian producers and researchers. In 1999 the first specialist organic retain outlet was opened in Tirana and over the past two years a number of projects have been initiated and partnerships have been forged between Albanian and European scientific institutions to give renewed impetus to the organic sector.

In Egypt (El-Araby, 2001), organic produce certification schemes were first introduced twenty years ago to meet the requirements of foreign importers of medicinal plants. Over the years the production has expanded to embrace fruit and vegetables and cotton intended for the European market. The lack of a national regulation has not hampered marketing as certificates are issued by six certifying bodies most of which in the importing countries. 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. Egypt markets organic produce in the UK, Germany and Italy (Abou Hadid, 2001).

In Israel (Adler, 2001), despite the limited arable land, organic production is well developed and fostered by research activities carried out by some local Universities. More than 7000 ha are currently organically cultivated, accounting for 1.25% of the arable land and the annual growth rate stands at approximately 25%. Organic products comprise: greenhouse-grown vegetables (100 ha), citrus (410 ha), fruit trees (830 ha), field crops, such as carrots, potatoes, tomatoes for industrial processing and cereals (5100 ha), minor and nursery-grown crops (560 ha) and livestock production. The total organic sector is worth US $ 180 million, 30% of which are marketed locally whereas the remainder are exported. Twenty years ago the

Israeli Bio Organic Agriculture Association (IBOAA) was established to train new producers and ensure inspection and certification.

In Lebanon (Estephan, 2001), environmental concerns and health awareness have contributed to strengthening the organic sector. The acreage devoted to organic production amounts to 160 ha (17 producers) and some more 90 ha are under conversion. However, the local market potential is not sufficient to fuel the expansion of the sector which remains hampered by the lack of production standards required to implement a national regulatory framework. Recently, organic products have started to be sold in some supermarkets and in healthy food shops in Beirut as well as in some nearby towns, but it is hard to tell whether there is a revived interest amongst local consumers.

In Malta (Calleja, 2001), with a view to boosting organic farming and given the pending joining of the European Union, the Malta's Organic Agriculture Movement (MOAM) was founded in 1999. The mission of MOAM is to promote 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. MOAM also promotes organic produce within hotels, restaurants and catering services and actively campaigns to raise awareness among tourists and natives and encourage consumption.

In Morocco (Kenny and Hanafi, 2001), the early attempts at adopting the organic production method date back to 1986 when a citrus grower from the Marrakech region was spurred by some French producers to go organic. From 1992 onward the organic production method has spread across the country despite the lamentable lack of a national regulatory framework.

The estimated acreage under organic farming totals 11 956 ha, 35% of which under conversion (Kenny and Hanafi, 2001). More than 1400 ha are grown with vegetables and citrus. Some varieties of vegetables are grown under greenhouses so as to ensure out-of-season harvesting. The major organically cultivated crops are citrus, medicinal plants and argan trees for oil making. The argan tree is a typical Moroccan crop, similar to the olive tree, the fruits of which are harvested by the natives to extract oil. The argan oil, which again is similar to olive oil, is used for cooking and for making cosmetics. Over the past five years, Morocco has been the sole world's producer and exporter of organic argan oil.

Since there is no domestic market, the production is fully exported, mainly to Europe. Vegetables (especially tomatoes and cucumbers) and citrus account for 95% of the goods which are exported to France, the UK and Germany.

Over the past five years, Tunisia (Ben Kheder, 2002) has witnessed a sustained and fast-paced increase in the acreage and number of farms which have gone organic, from 10 farms over 300 ha in 1997 to 137 farms over about 15 thousand ha. Organic products comprise olive oil, dates, vegetables, fruits and honey. This growth is largely dependent on the expanding export opportunities and the huge efforts the state has put to back the organic sector. Tunisia is the southern Mediterranean country which has first transposed the regulation governing the inspection and certification of organic produce and has issued a law on organic farming (Law no. 99-30, dated April 5, 1999). The Tunisian government has also recognised some foreign inspection and certifying bodies and a Tunisian body, INNORPI (Institut National de la Normalisation et de la Propriété Industrielle). A subsidy has also been envisioned and local farmers are reimbursed 70% of the inspection and certification expenses borne. In addition, the “Centre Technique de l’Agriculture Biologique” (CTAB) has been set up and a number of actions have been undertaken to help conversion and promote training. The local market is still in its infancy and a limited range of Tunisian organic produce is on sale in a few supermarkets in the capital city.

Turkey (Aksoy, 2001), with more than 26.7 million ha, is the Mediterranean country which has the vastest arable land available; it is one of the few countries in the world which has exceeded the food self-sufficiency threshold and is a leading exporter of agricultural products. The farming sector remains the major source of employment for 56% of the population and feeds the local industry. The current acreage devoted to organic production exceeds 40 thousand ha which encompass more than 12 thousand farms. Also in Turkey the spur to go organic has come from abroad. It started in the mid 1980s following an upsurge in demand by European importers. The early foodstuffs to be produced organically were dry fruits. Over the years, about one hundred products have been added to the list, including fruit juice and preserves, bakery products etc. In 1992 the Turkish Association of the Organic Agriculture Movement (ETO) was established to cater for the needs of the existing organic farms, set the standards for production, inspection, certification and export of organic produce and speed up the development of the sector. This Association, which groups researchers, farmers, distributors and consumers, provides training and counselling to farmers and serves as a link between dealers and institutions. A national regulation was enforced in 1994 in keeping with the EC regulatory framework. The Ministry of Agriculture has been entrusted to supervise the sector. The bulk of the domestic production is exported to the European Union (80%), especially to Germany (60%) and the USA (15%). The domestic market started to operate in 1999, mostly in the main towns. Marketing is generally confined to healthy food shops and supermarkets.

The country-based analysis has highlighted a flurry of interest for organics among producers who have realised the promising marketing opportunities on the leading markets. A mounting interest in organic products is also sweeping among consumers across the Southern Mediterranean countries where it is safe to expect a local market boom. This is an enticing scenario which bolsters producers’ confidence and encourages dealers and public institutions to keep a close eye on this flourishing sector.

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