Food and Agriculture Organization of the United Nations

European Bank for Reconstruction and Development

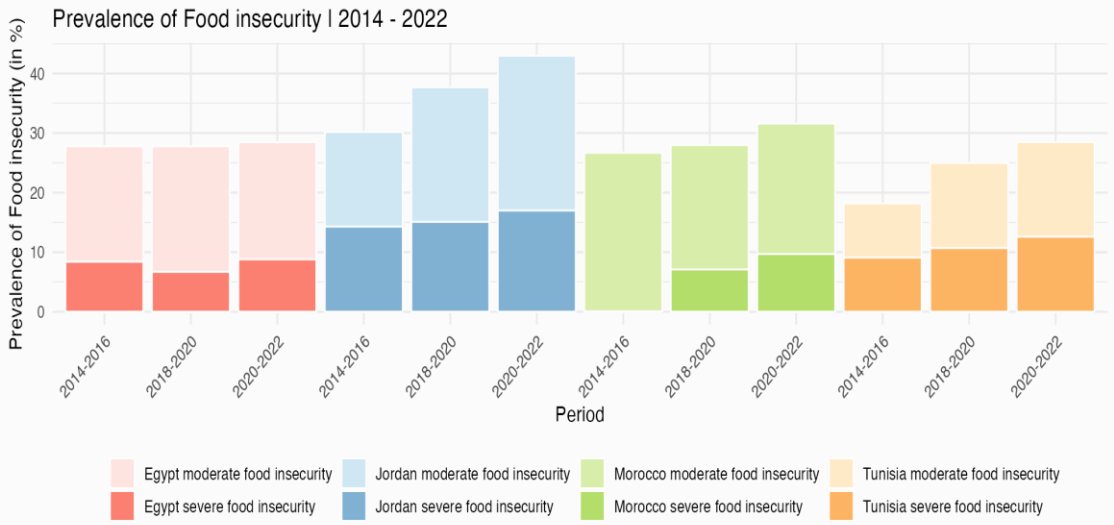
EBRD/FAO technical cooperation package to support Food Security in the SEMED region

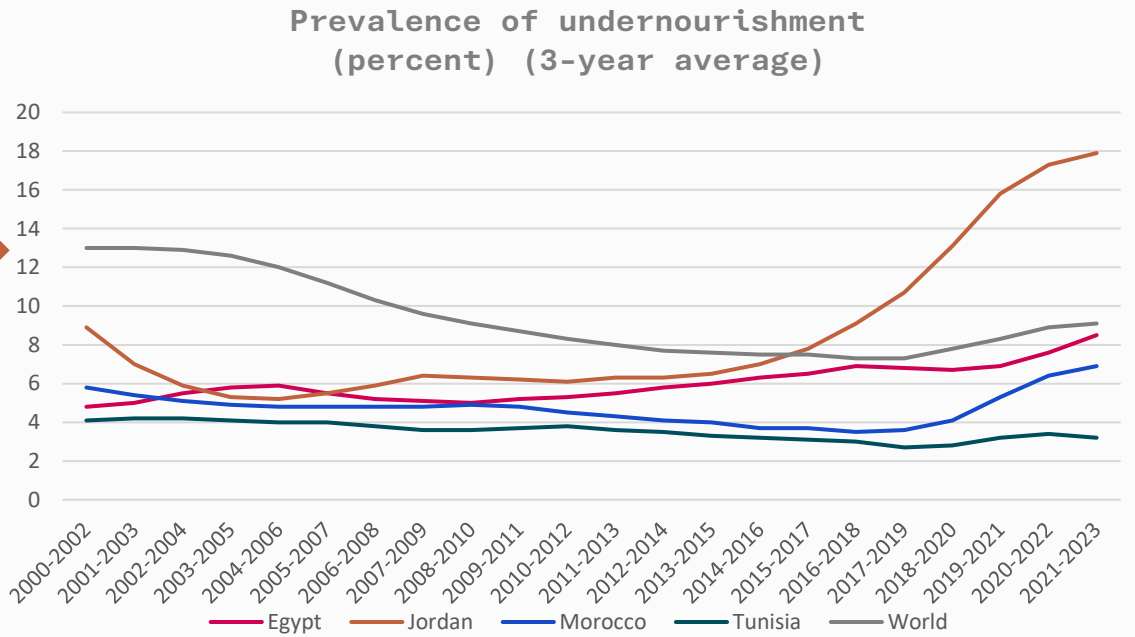
Key trends in the agrifood sector: Egypt, Jordan, Morocco and Tunisia

Recent increases in food insecurity and malnutrition in SEMED region: a complex challenge

Hunger, food insecurity and malnutrition have increased in the SEMED region

- After decades of decline, with advent of COVID-19 pandemic, the prevalence of undernourishment in Egypt, Jordan and Morocco significantly increased.
- All countries witnessed increasing levels of severe and moderate food insecurity
- This situation was exacerbated by impact of Ukraine war on food prices

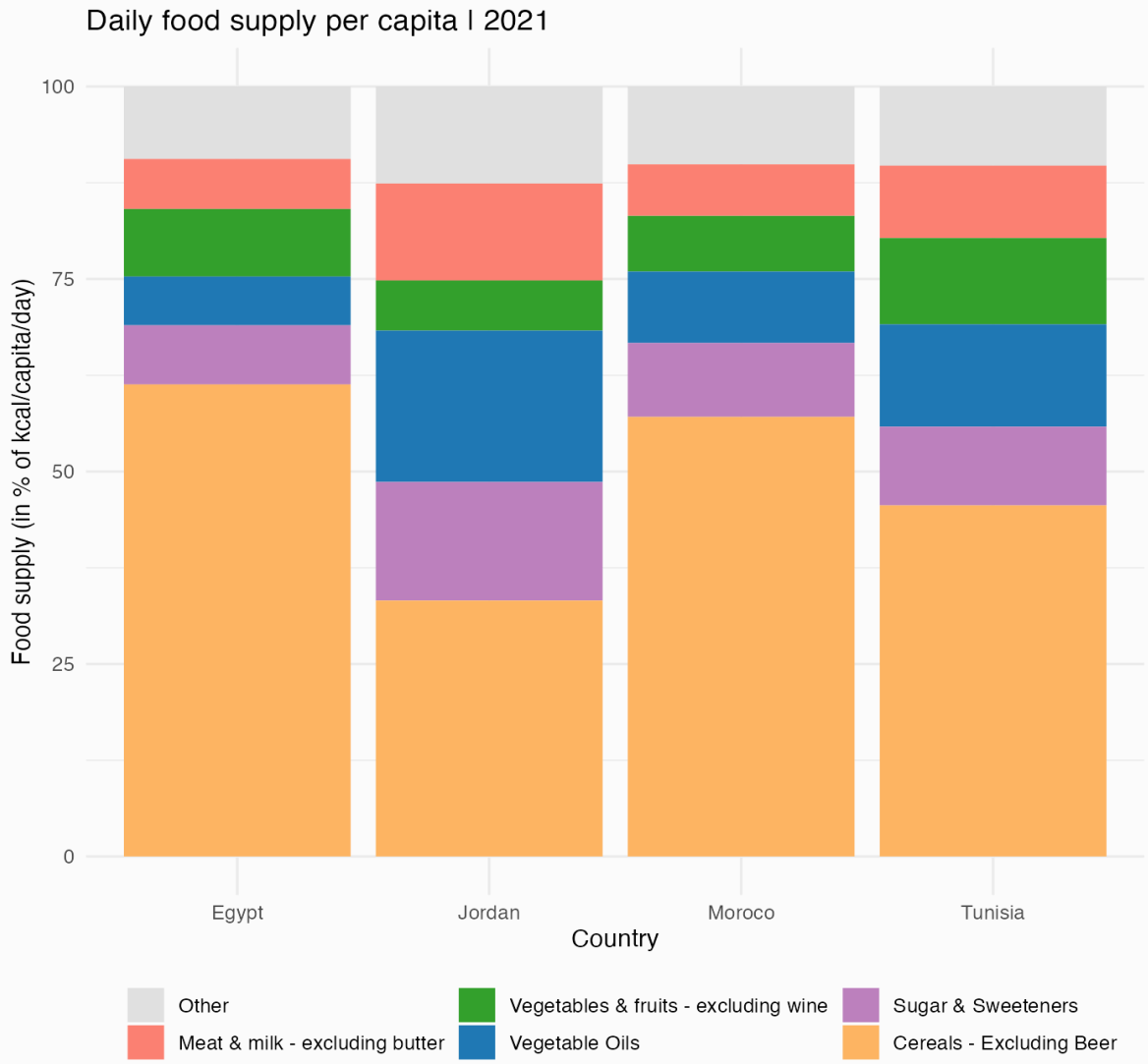




Source: FAO STAT, Data for Jordan: Regional Overview of Food Security and Nutrition 2023

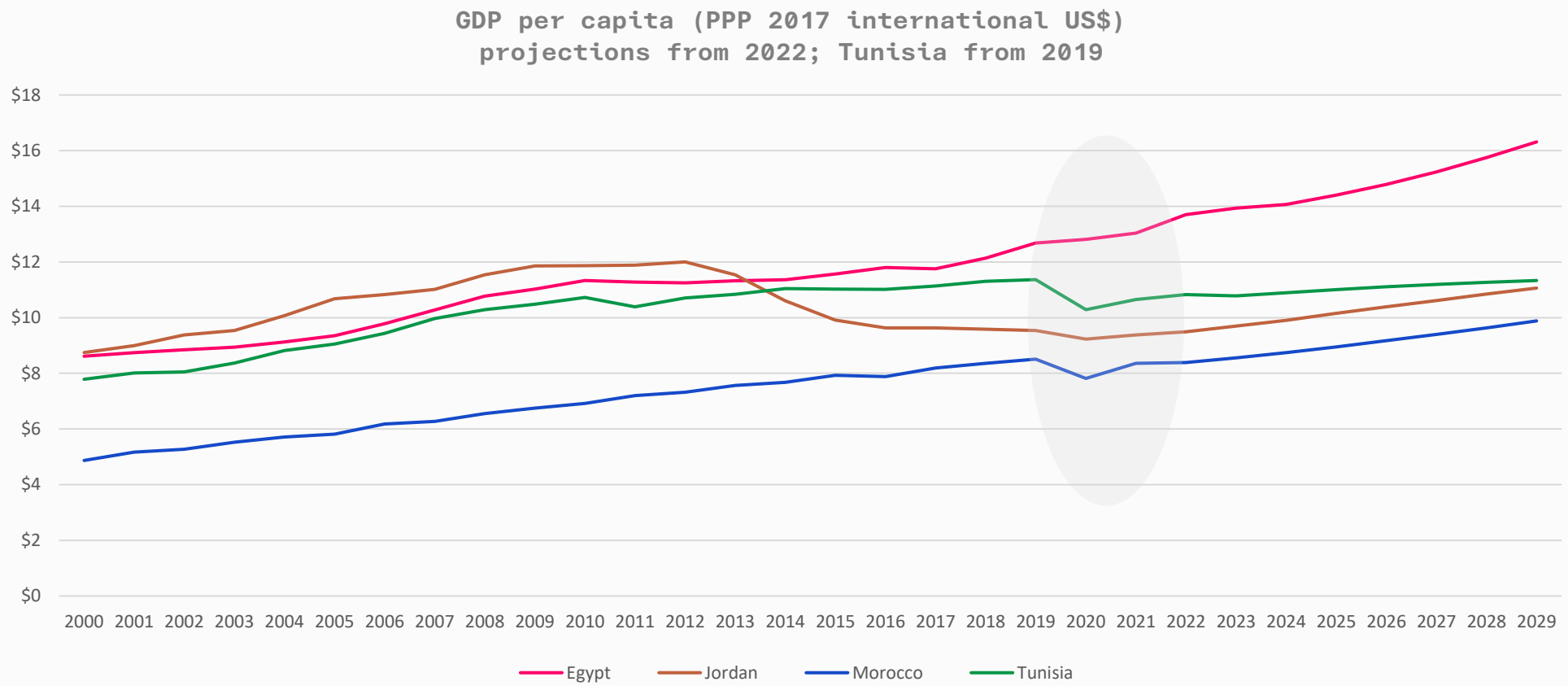
Cereals remain the main source of dietary energy in SEMED countries

- Cereals contribute over 50% of dietary energy intake in Egypt (61%) and Morocco (57%), Tunisia (46%) and less so in Jordan (33%).
- Projections (2017-2026) indicate increased food demand in North Africa, especially for sugars/sweeteners and dairy products.
- Cereals will see a modest 1% per capita supply increase, while vegetable oils, meat and fish exhibit an average 5% supply growth (2015-2026) in North Africa.



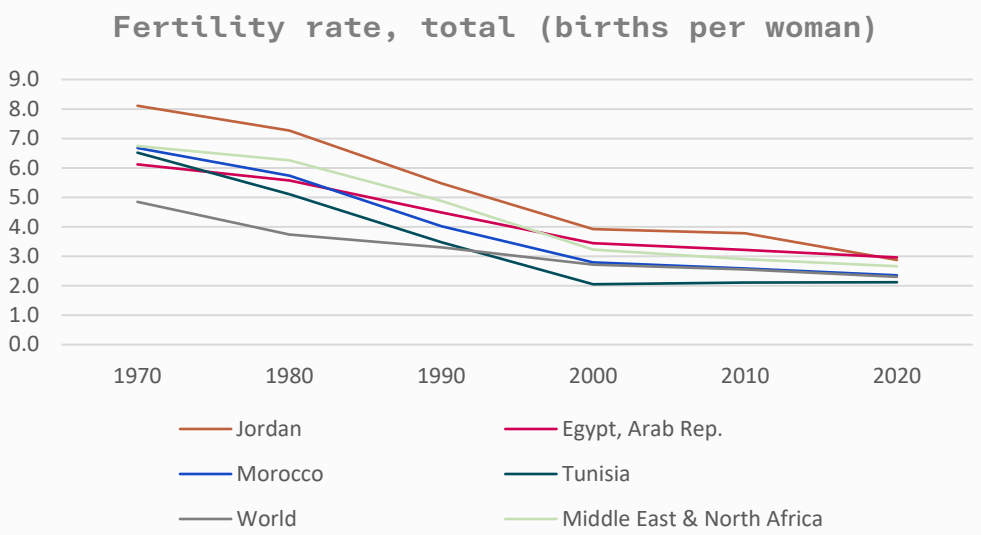
Source: FAO. 2023

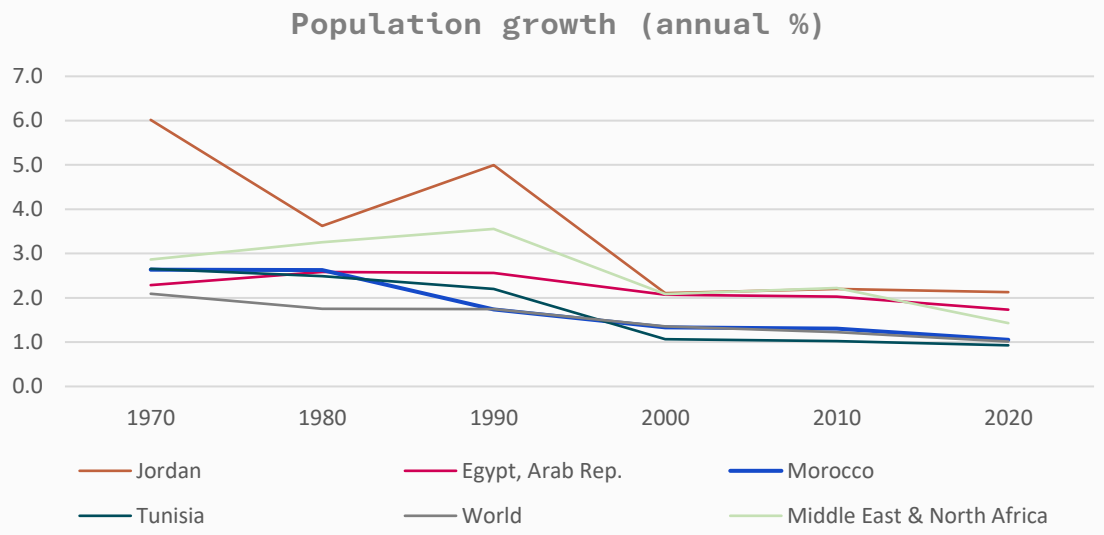
Recent economic performance has been mixed due to COVID-19, Ukraine war and regional instability, but GDP is projected to grow over the next few years

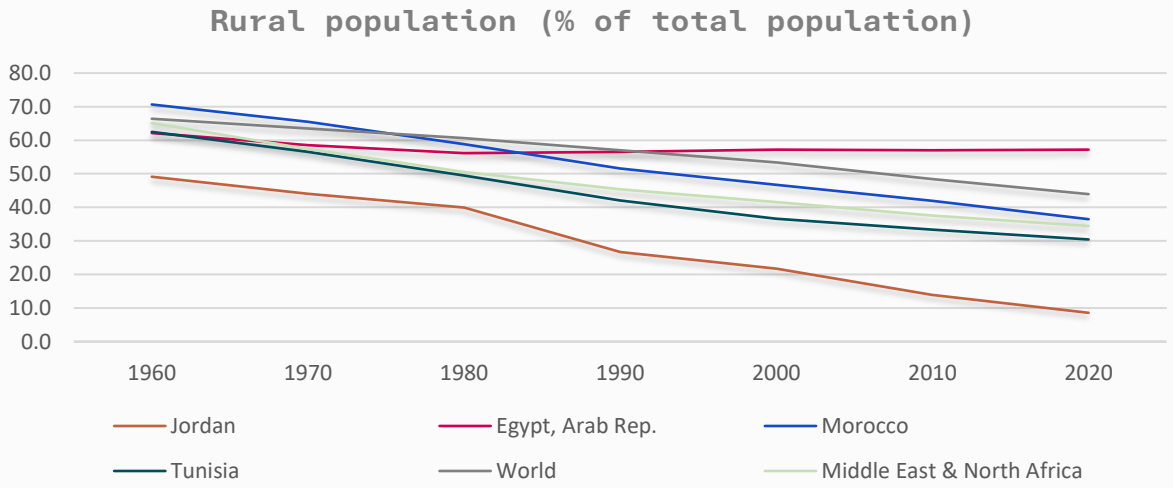


Source: International Monetary Fund, 2024

Continued population growth in the SEMED countries intensifies competition for crucial natural resources such as land, soil, energy, and water, and increases demand for food







Urbanization and shifting demographics (rural-urban migration and refugees) in SEMED countries are reshaping food security challenges, requiring strategic planning for growing food demand

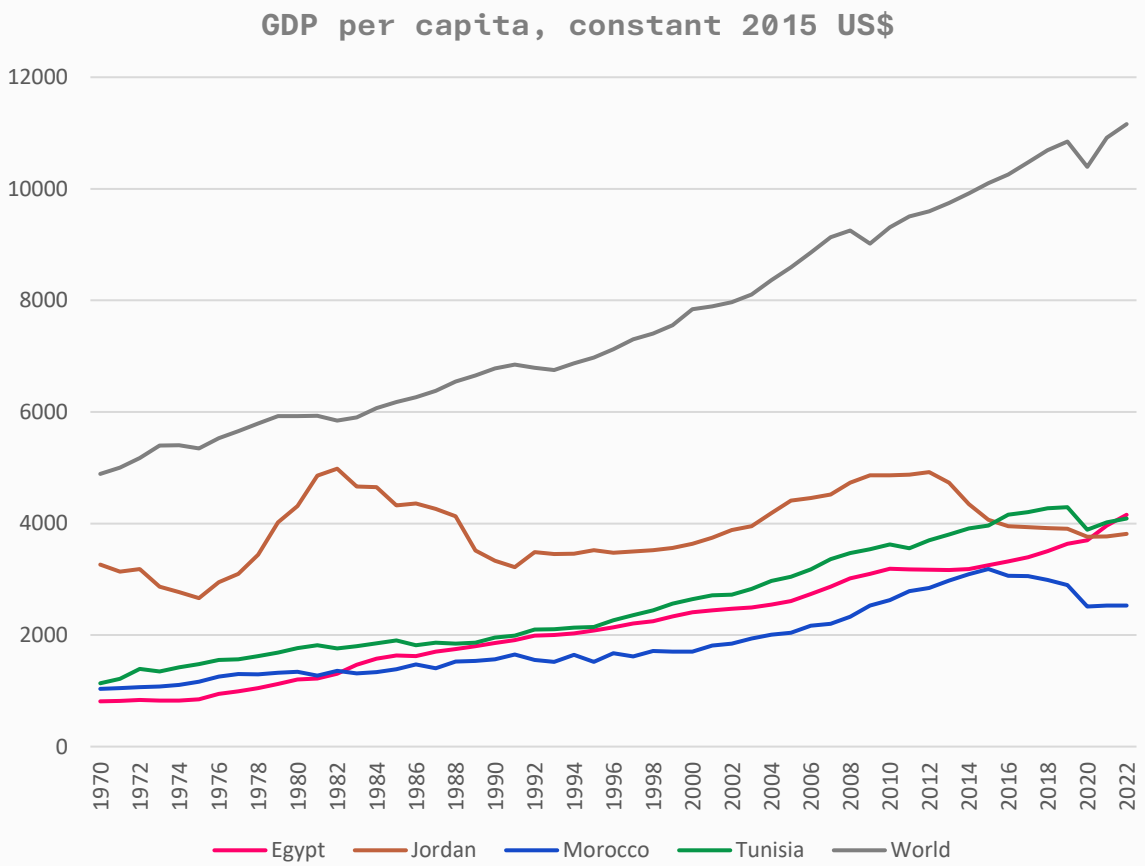
Source: World Bank, 2024

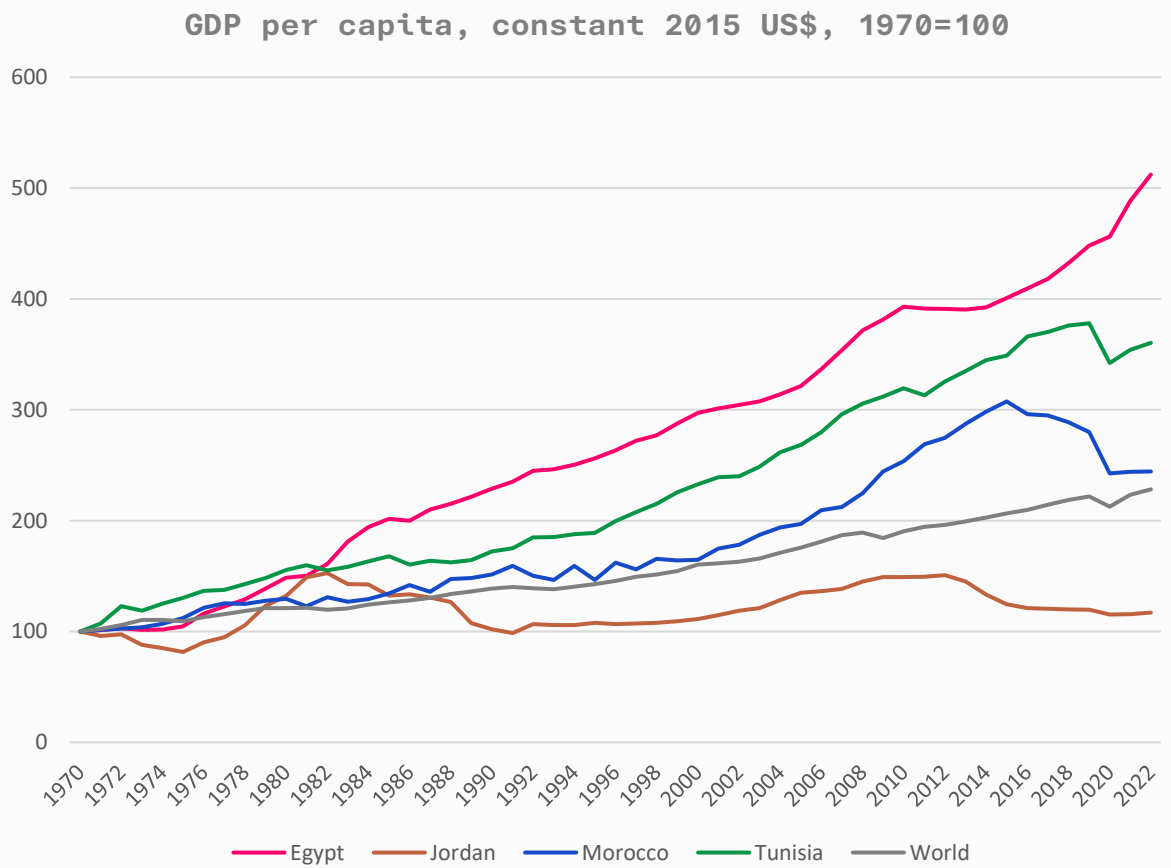
Summary

- Over the last three decades, there has been a decline in food insecurity (measured by PoU) and poverty, but an alarming increase in other forms of malnutrition (adult obesity and overweight among children). Challenges continue in assuring the affordability of a healthy diet.
- Recent years have seen a reversal, with food insecurity (both PoU and FIES) on the rise due to factors such as the COVID-19 pandemic, the war in Ukraine and regional instability.
- Looking ahead, while economic growth in terms of GDP per capita is expected to rise, significant challenges loom for agrifood systems transformation and ensuring access to healthy diets. These challenges are compounded by population growth, urbanization, and the intersecting impacts of climate change and natural resource depletion.
- All four countries have employed a variety of social protection programs and food subsidy initiatives to assure basic needs and mitigate impacts of external shocks
- National policies historically favour consumers through social protection subsidies aimed at shielding them from increasing shocks. These policies are often combined with agriculture production support or initiatives for self-sufficiency, aimed at supporting producers and advancing national interests. While these policies are aimed at ensuring food security, they have contributed to shift towards unhealthy diets and overnutrition.

Strengthening local agrifood systems for improved agricultural productivity and food security

GDP per capita in Egypt, Morocco and Tunisia has risen at a faster rate than the World

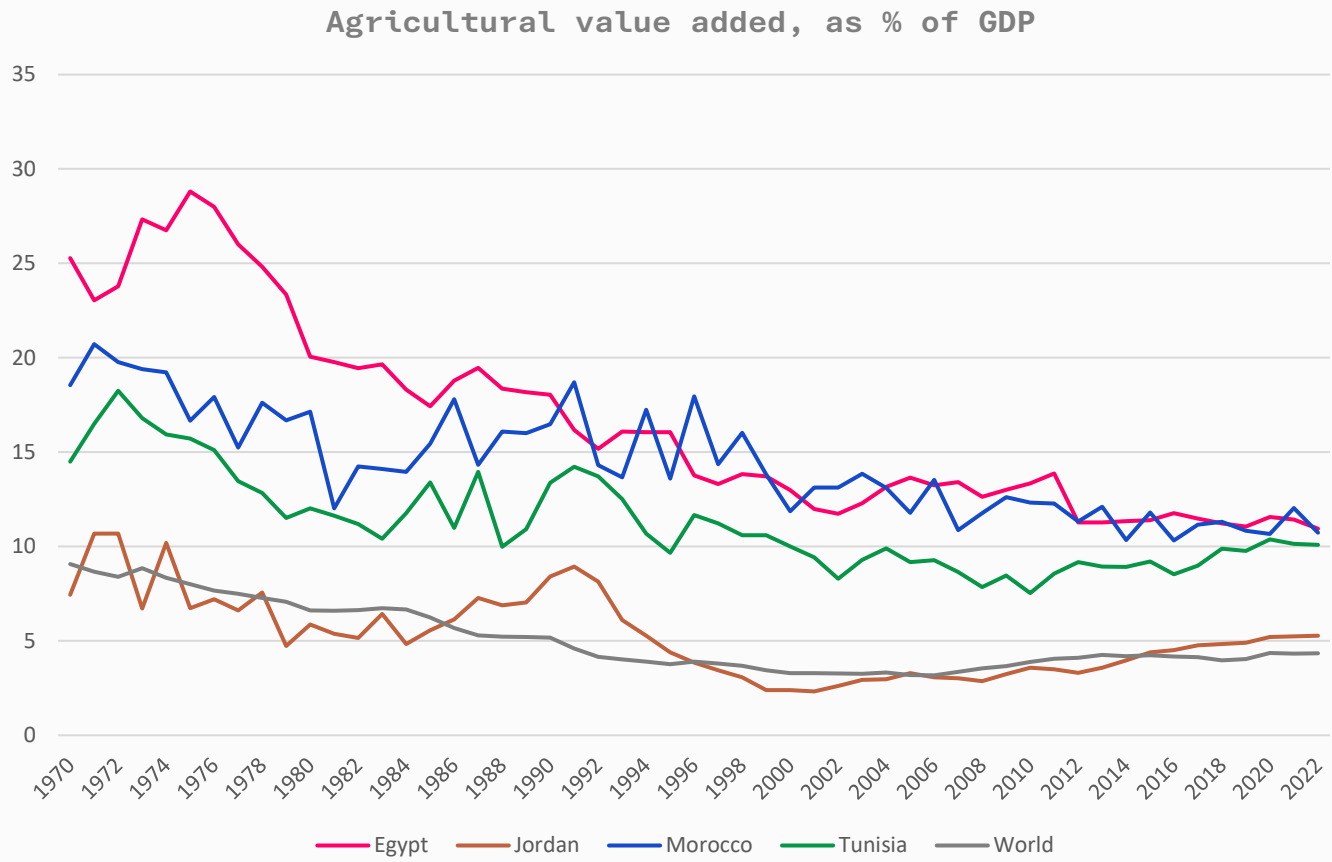




Source: FAOSTAT,2024

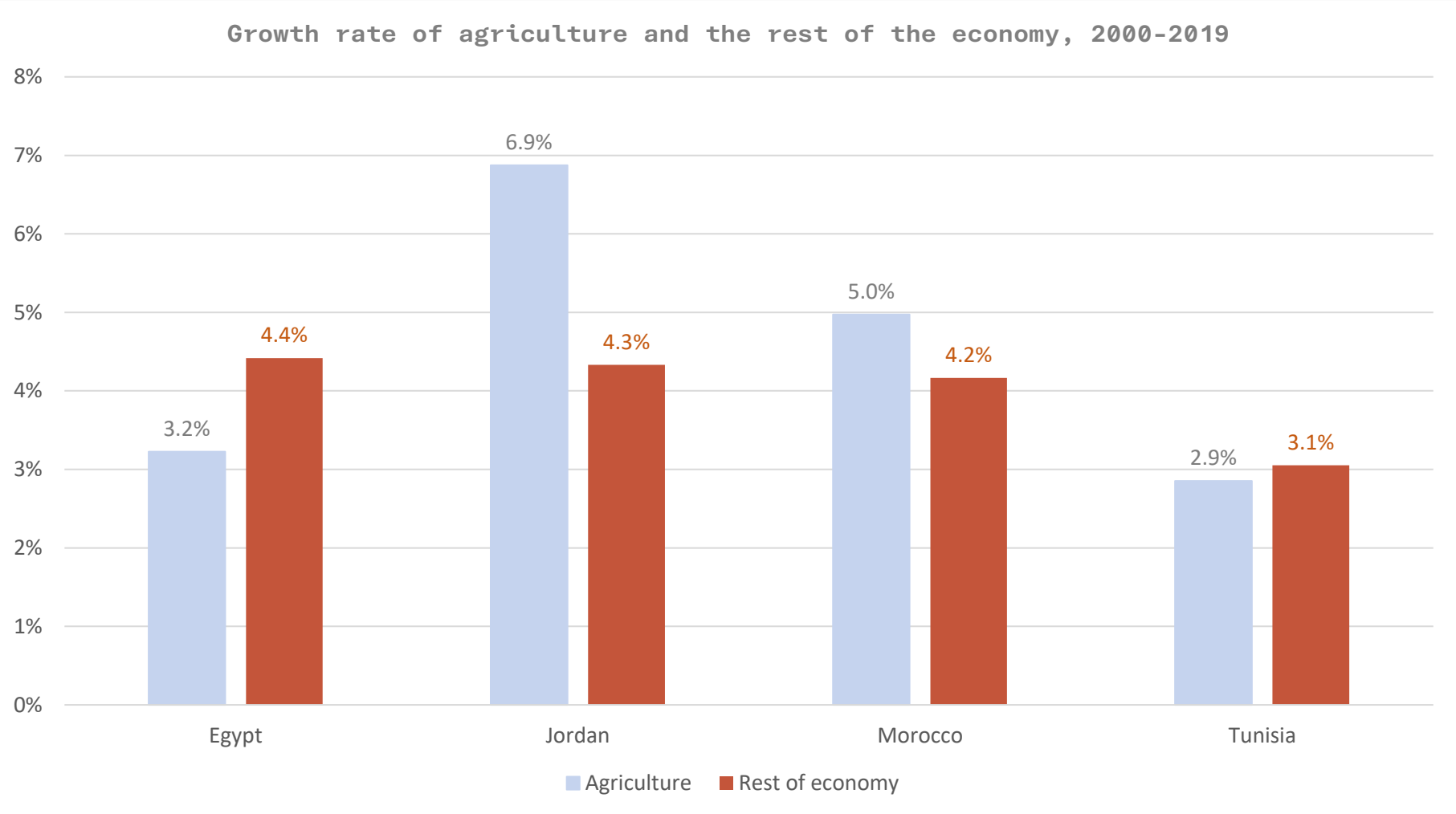
The decline in agriculture's contribution to GDP over the past 50 years is consistent with structural transformation

- In Egypt, Tunisia and Morocco agriculture contributes approx. 10% to total GDP, well above the world average of 5%.
- In Jordan, agriculture contributes approx. 5%.



Source: World Bank: World Development Indicators.

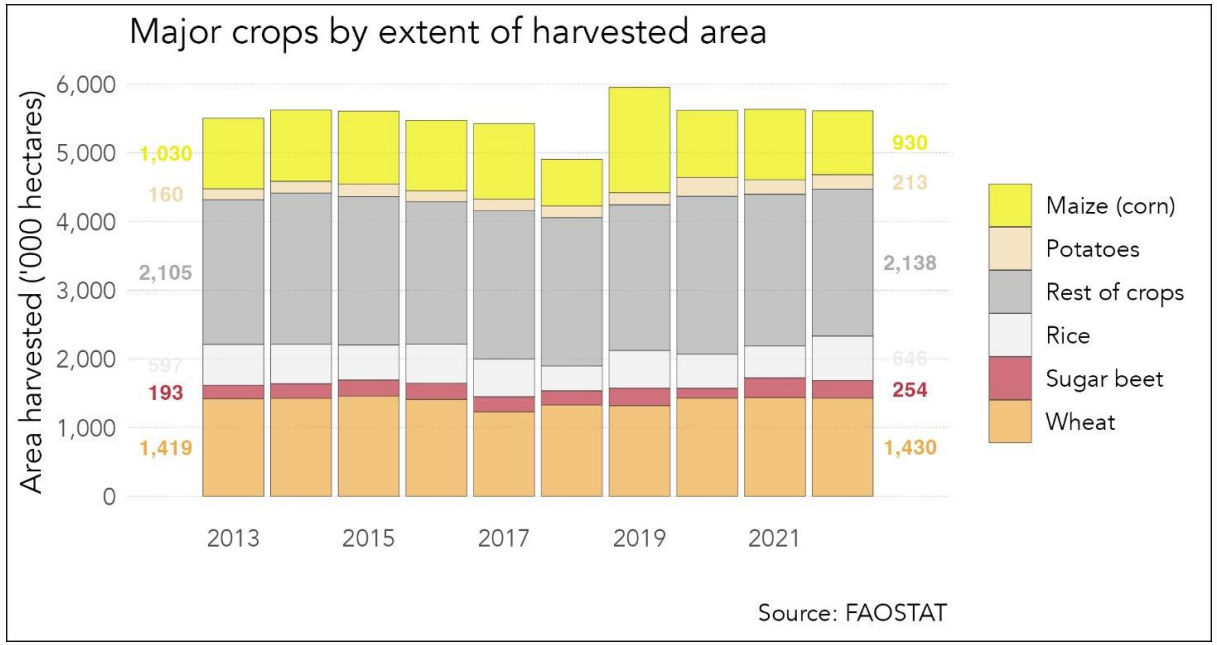
All four countries have had growth in agriculture over the past 20 years



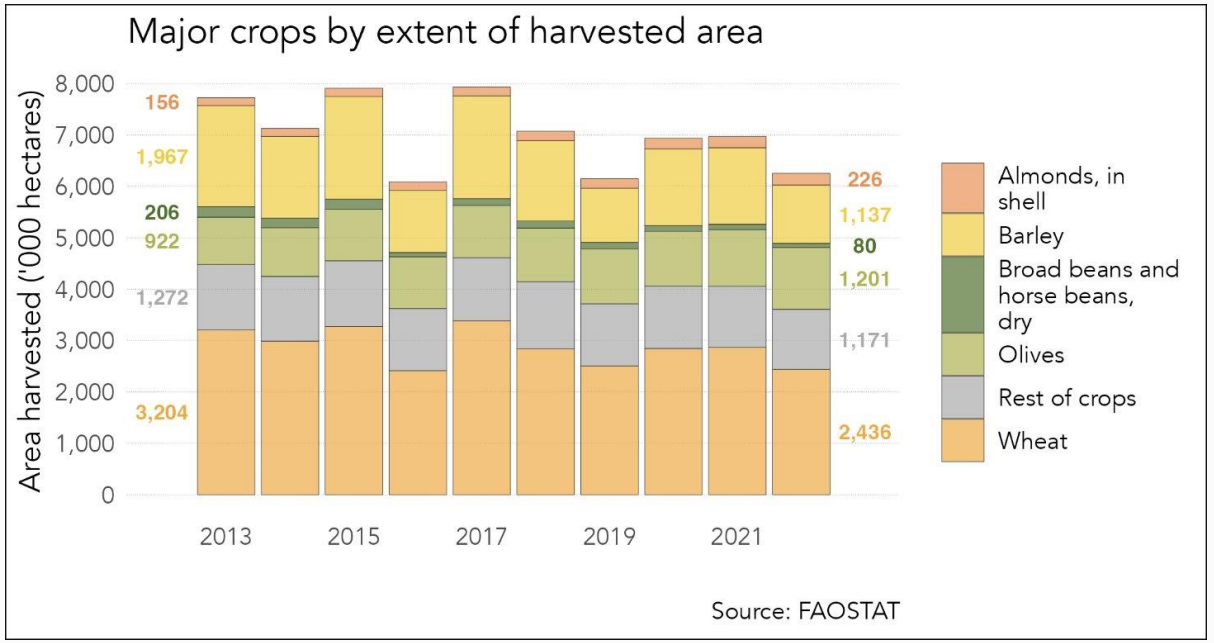
Major crops during 2013-2022

The main crops by harvested area in 2022 in Egypt are wheat, maize, sugar, potatoes and rice, while Morocco is wheat, olives, barley and almonds, in shell.

Egypt



Morocco



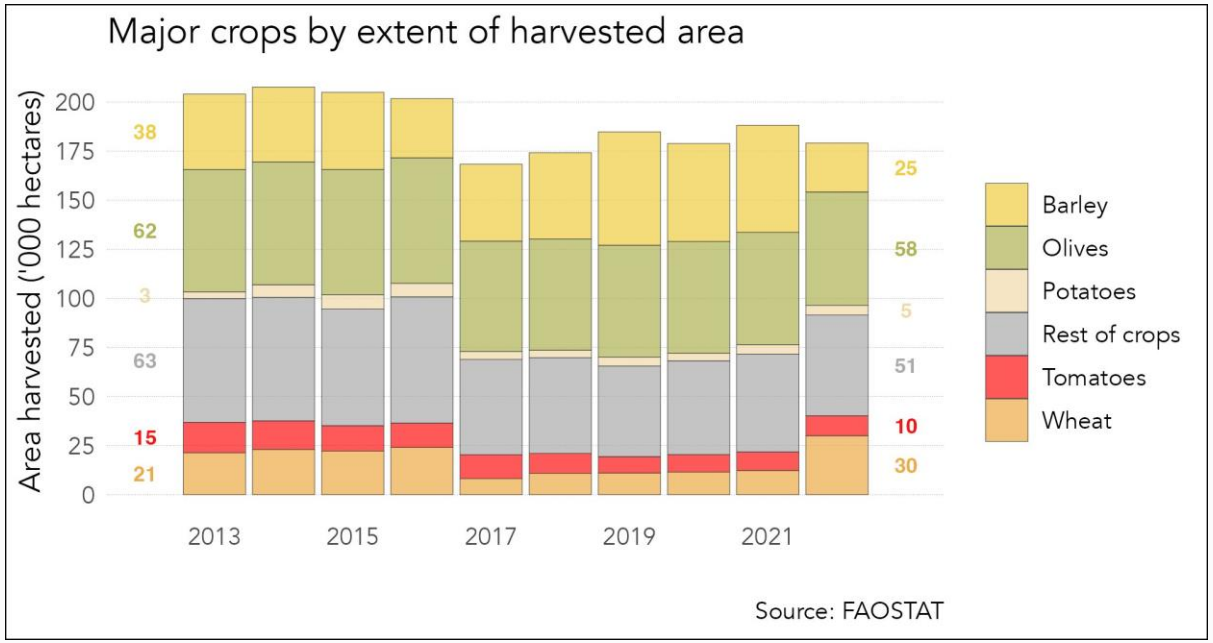
Source: FAOSTAT,2024

Major crops during 2013-2022

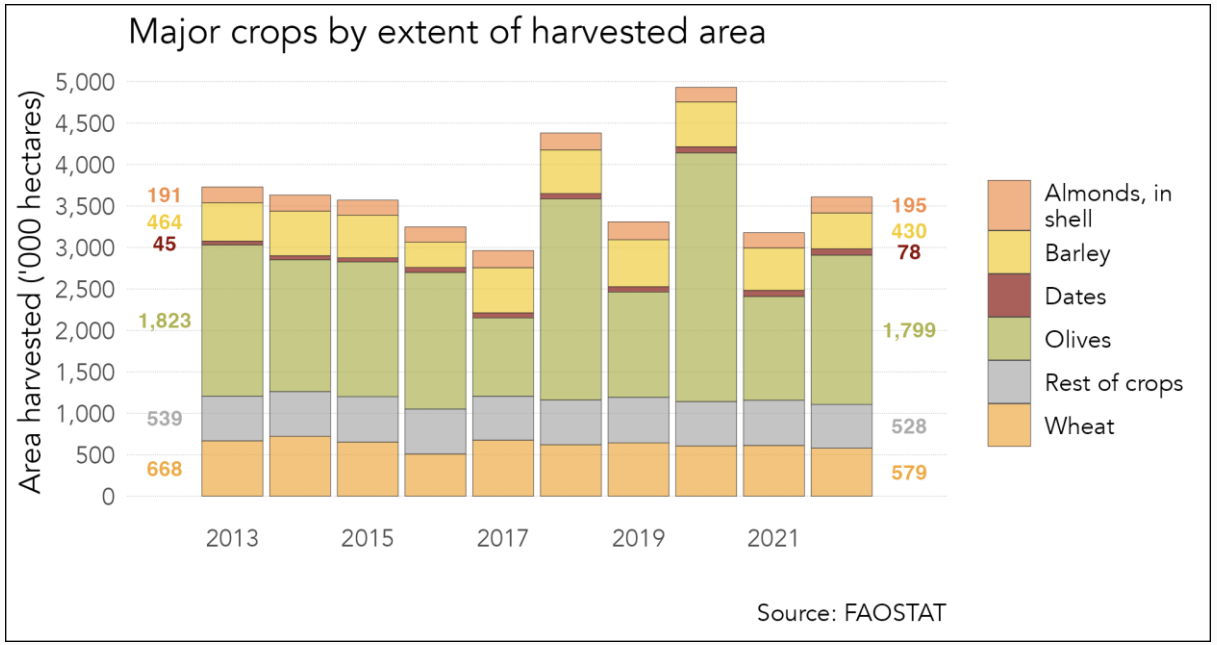
Olives are the leading crop in both Jordan and Tunisia, followed by wheat and barley.

Tunisia also grows almonds and dates, while Jordan includes tomatoes and potatoes.

Jordan



Tunisia



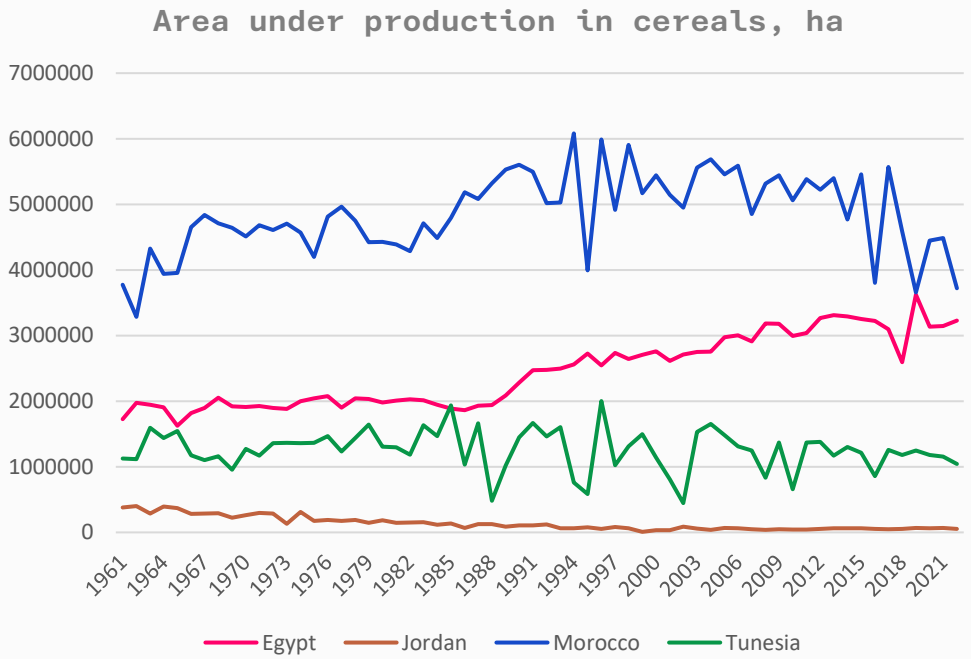
Source: FAOSTAT,2024

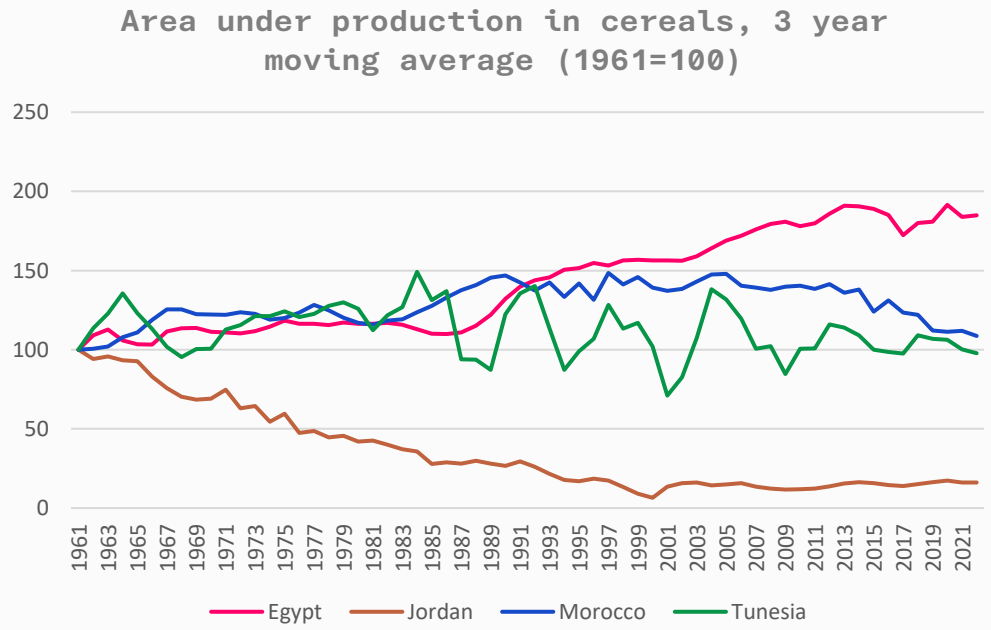
Trends in cereal production area across countries

Egypt expanded its area under production in cereals almost two-fold since 1961.

Morocco increased then decreased area in cereals.

Tunisia also grows almonds and dates, while Jordan includes tomatoes and potatoes.





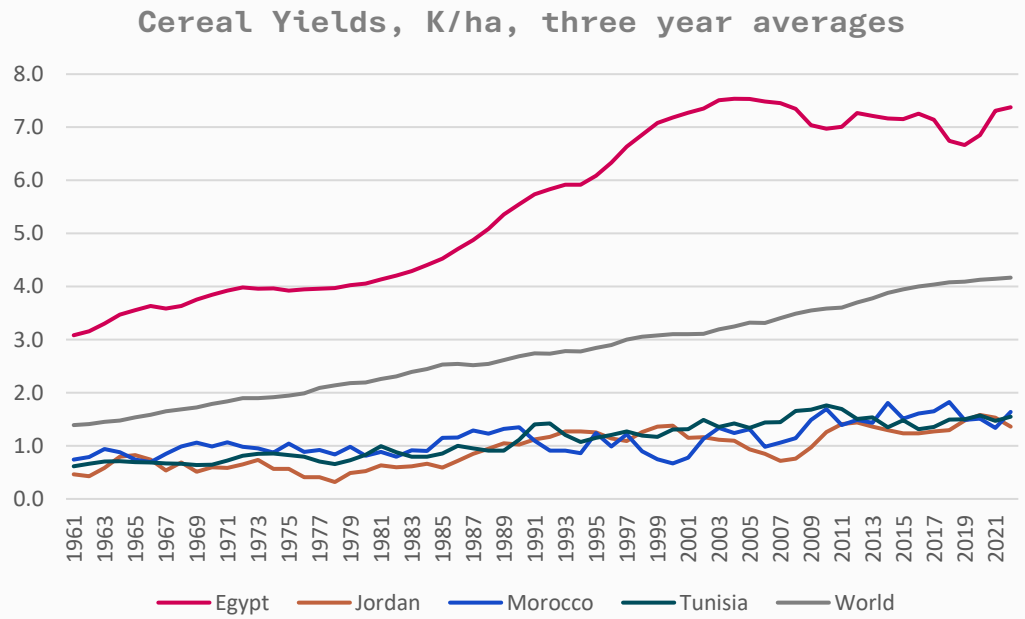
Source: FAOSTAT,2024

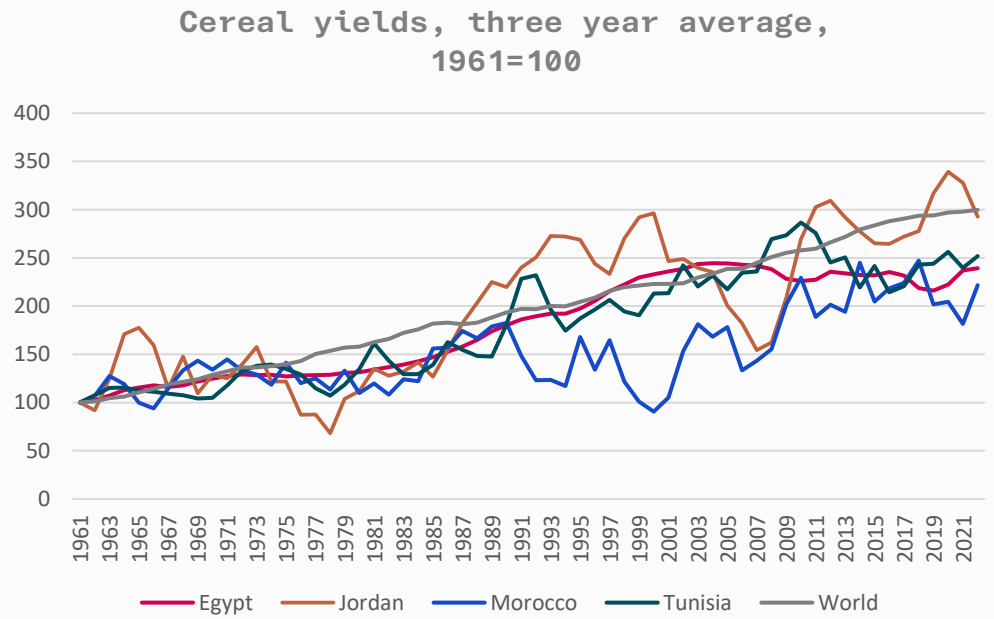
Cereal yield trends and growth rates over 60 years

Egypt has much higher yields in cereals production than the other three countries.

Jordan, Morocco and Tunisia have relatively low cereals yields, below the world average

These three countries have seen greater or similar growth in yields to Egypt over the last 60 years, though from a much lower starting point.

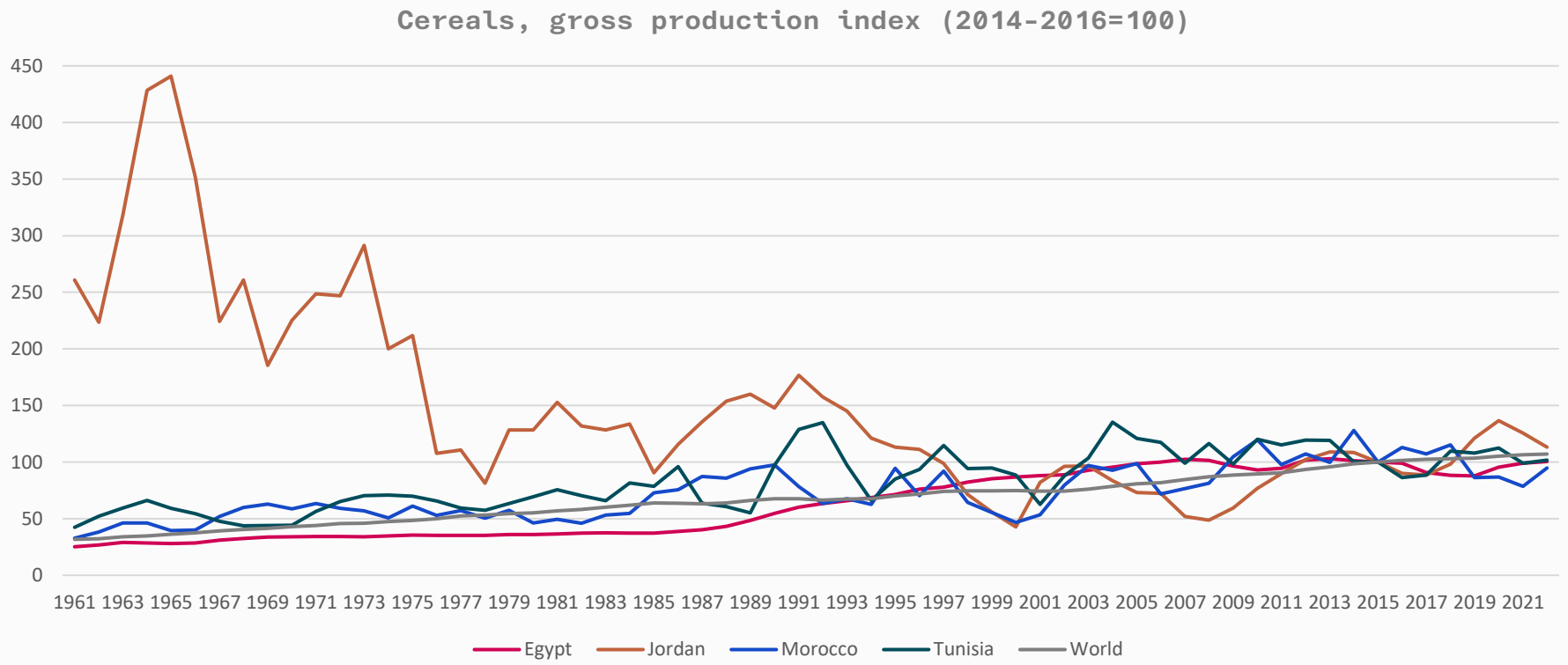




Source: FAOSTAT,2024

Total cereal output trends: Egypt, Morocco, Tunisia and Jordan

While total production of cereals in Egypt, Morocco and Tunisia has increased at a similar rate as global production, total output in Jordan has fallen.



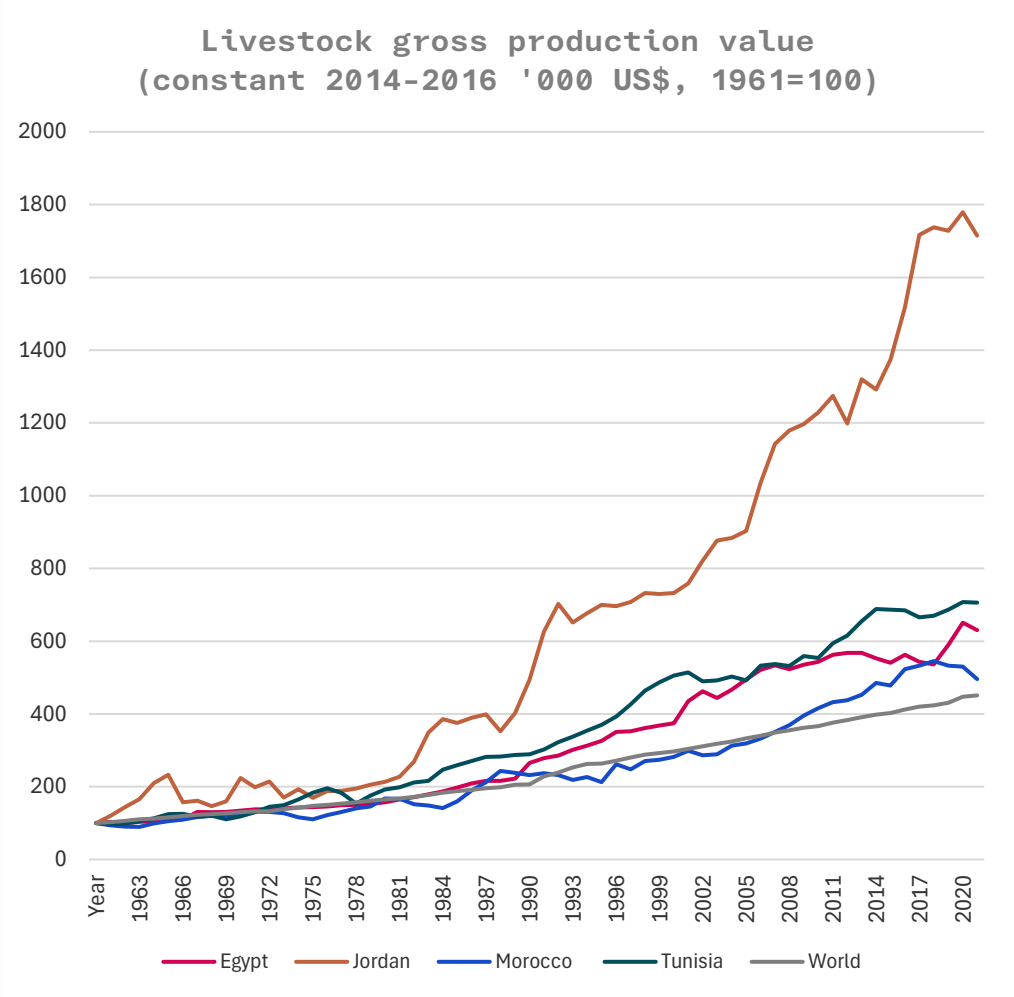
Source: FAOSTAT,2024

Cereal production trends summary in SEMED

- Egypt: The increase in cereals output is driven by increase in both area harvested and yields. Cereals depend on irrigation. Wheat self sufficiency is 50%.
- Morocco: While area harvested in cereal declined, increases in yields lead to increased levels of production. Wheat self sufficiency is 37%.
- Tunisia: Increase in yields combined with similar area harvested led to increase in total cereals output. Wheat self sufficiency is 36%.
- Jordan: Yields increase did not compensate for the reduction in harvested area leading to overall reduction in cereals outputs. Wheat self sufficiency is 3%.

Livestock play a vital role in the region's economy and food supply, and efforts to improve productivity and sustainability in this sector are essential for agriculture productivity and food security

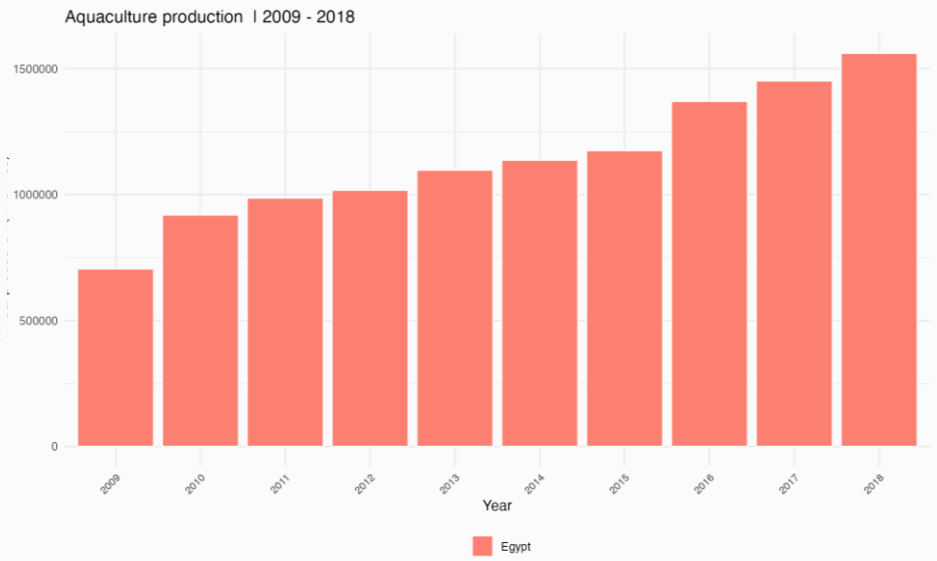
- Grazing livestock provide a way to generate food from areas where rainfall is too low to support cropping, making an important contribution to income and nutrition.
- Livestock production value has increased in all countries at a higher rate than the global average, with Jordan in particular experiencing higher value of output.
- Livestock contributes 40% of agriculture in Egypt, 55% in Jordan, and 38% of agriculture and 14% of total GDP in Morocco and contributes 48% of agriculture GDP in Tunisia.
- Primarily intensive in Egypt. Focus on Awassi sheep in Jordan, known for adaptation to arid conditions. Mix of traditional and modern farming in Morocco. Tunisia is focused on small ruminants (sheep and goats) and dairy cattle.
- Beef serves as a secondary protein source in MENA diets, following chicken and fish, with per capita consumption on the rise.
- Women across SEMED countries actively contribute to livestock activities, with varying responsibilities, but they do not have the same decision-making power. Women play an important role in animal production, especially in processing and trade of derived food products. Poultry serves as primary income source for rural women.

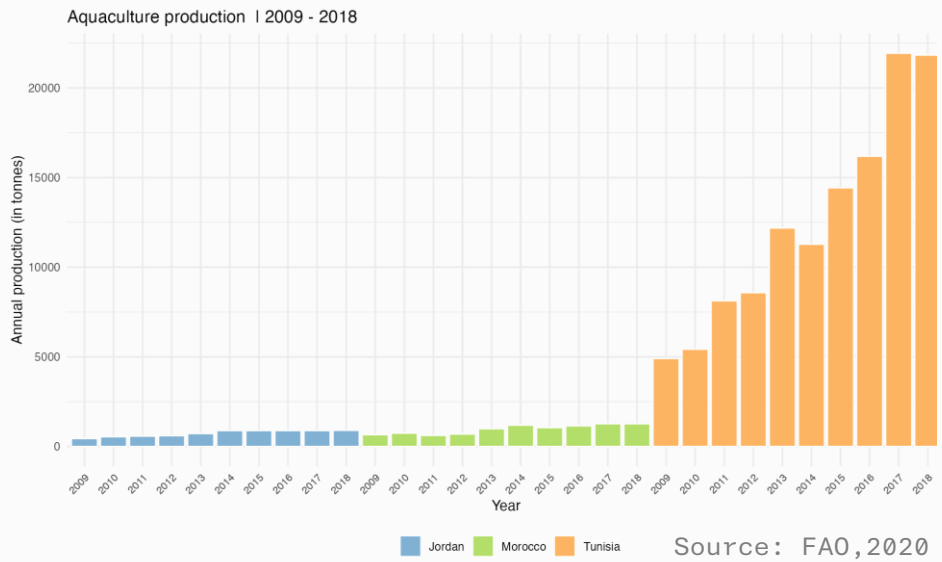


Source: FAO,2024

Fisheries and aquaculture play vital roles in the region's economy, crucial for ensuring food security. However, sustaining their contribution requires building resilience in the food value chain

- Over the last decade, aquaculture has gained prominence, doubling its production to reach 1.7 million tonnes and a value of USD 2.3 billion in 2018. Egypt leads with nearly 2/3 of the total value, followed by Tunisia. The sector has displayed rapid growth since the 1980s, signaling ambitious development goals.
- Aquaculture contributes 0.59% of total GDP in Egypt, 0.23% in Tunisia, and 0.02% in Jordan, while in Morocco, it is less than 0.01%.
- Gender disparities exist, with women less involved, particularly in lucrative activities.
- The sector faces challenges due to climate change, conflict, and the COVID-19 pandemic, emphasizing the need for robust resilience planning.





Source: FAO,2020

Agrifood value chains in the region face numerous challenges across all segments

- The dynamism of agrifood value chains drives rural transformation.
- Food processing and manufacturing is the top manufacturing industry in Morocco and ranks second in both Egypt and Tunisia. In terms of employment, it is the top industry in Egypt and second in Morocco and Tunisia.
- The region's average logistics performance index is 2.7, against 3.14 and 3.53 in key export markets, East Asia and the Pacific, and Europe, respectively.
- Agrifood value chain development is hindered by various barriers, including capacity limitations, unfavourable governance, inadequate infrastructure and unsustainable policies.
- In Egypt, Morocco and Tunisia, the share of total food supply lost during storage and transportation is higher than in most OECD countries
- Weak performance is observed in various stages of the value chain, particularly in storage, distribution, wholesale and cold chain (refrigerated warehouse capacity is about 15% of world average), as well as innovation for value addition and export potential.

Despite its potential to drive transformative changes in agrifood systems towards sustainability, resilience and inclusivity, the private sector in the region continues to encounter significant challenges

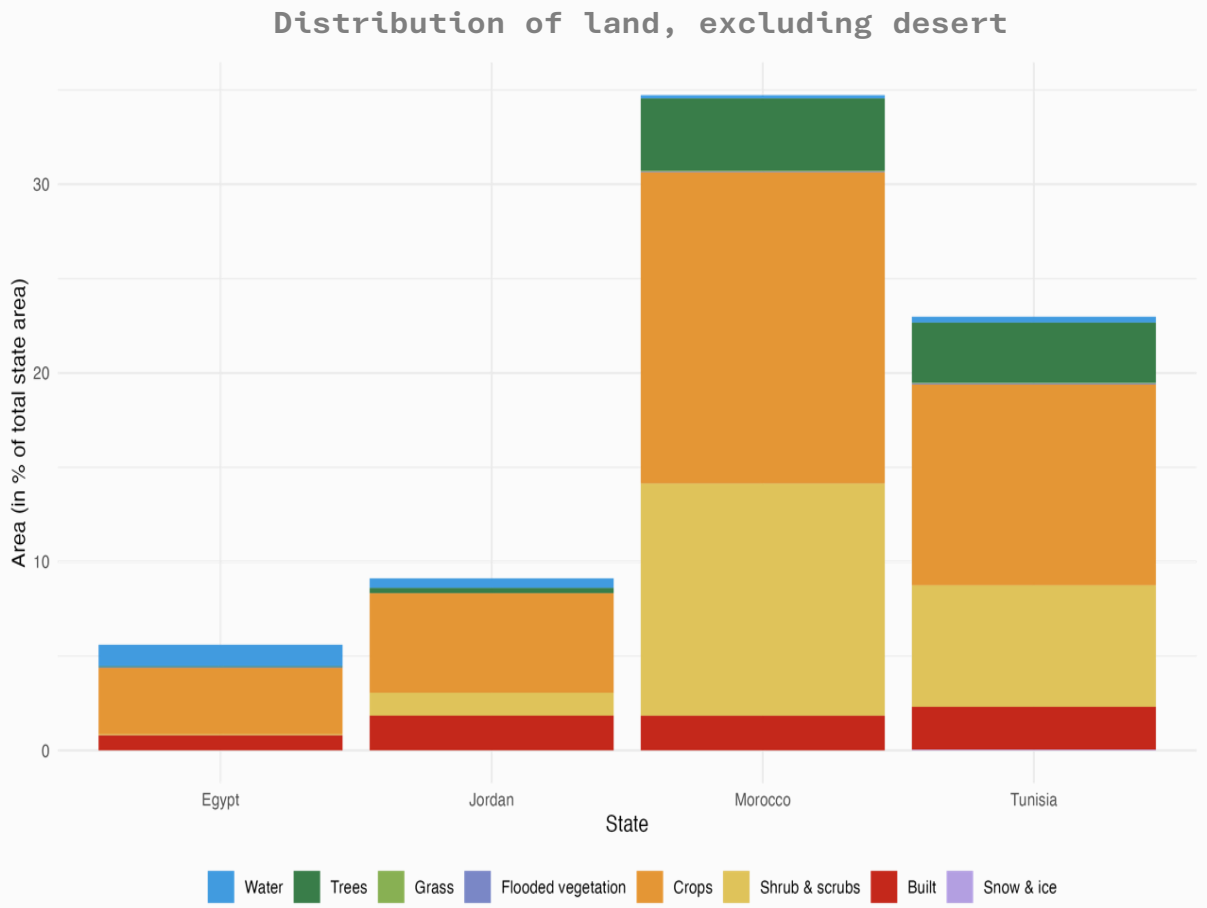
- Agribusiness, especially SMEs, often face barriers such as unfair value distribution, limited access to skilled labor and resources, restricted market access, and challenges in complying with food safety and quality standards.
- The business environment is imbued with legal and regulatory ambiguity, suppressing private sector investment. Morocco ranked 53 in the World Bank Doing Business Index, Jordan 75, Tunisia 78, and Egypt 114.
- Women and youth face additional challenges, limiting the potential growth of the sector.

Agricultural support policies revolve around modernizing the sector, facilitating large-scale land acquisition, subsidizing staple crop cultivation, and regulating producer and import prices.

- Countries like Egypt, Tunisia and Morocco aim for greater food self-sufficiency, but face challenges due to heavy cereal import dependence.
- Large, intensive corporate/private farms are promoted through public support and credit access, while small farms lack support and modernization.
- Egypt facilitates domestic and foreign large-scale land acquisitions to ensure food/feed supply.
- Egypt, Morocco, and Tunisia subsidize staple crop production through guaranteed prices, input subsidies, and import tariffs to reduce import reliance.
- Producer prices for staples like wheat are significantly higher than import prices, suggesting domestic policies raise food prices.

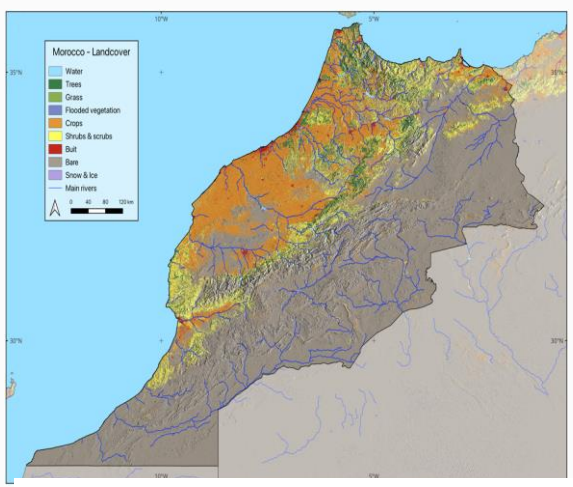
The predominant land cover is bare desert

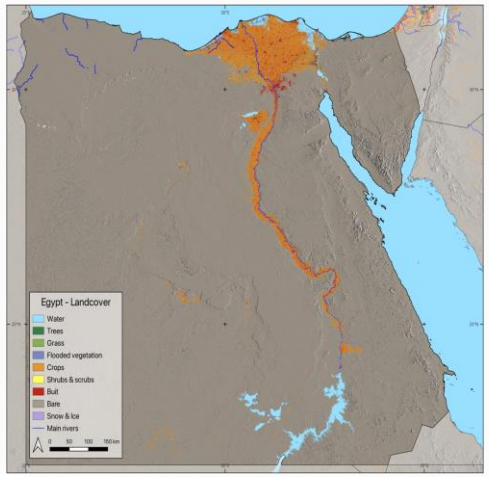
- Around 70% of Morocco & Tunisia, and over 90% of Egypt & Jordan are bare desert
- Egypt moves almost immediately from irrigated cropland to desert, whilst Morocco, Tunisia and, to a lesser extent, Jordan also have areas of scrub & shrubs that support nomadic livestock
- Fixed agriculture area is being shared by increasing populations

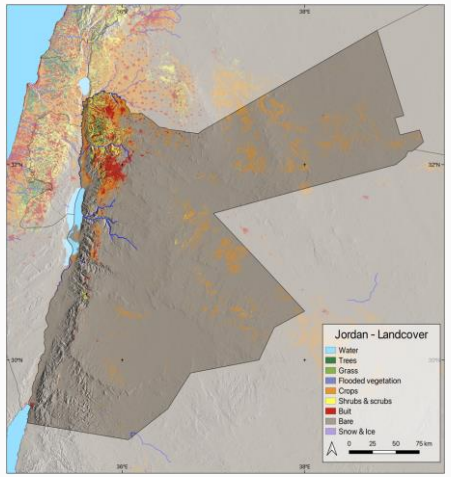


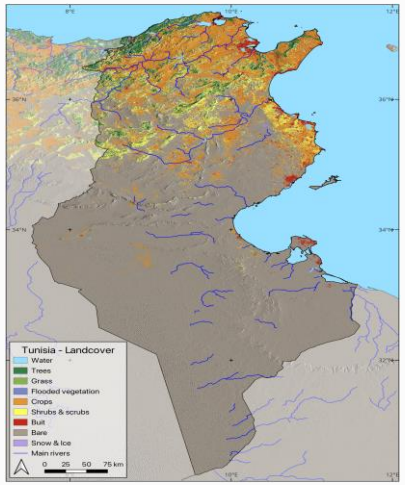
Data source: Dynamic World (Brown et al. 2022)

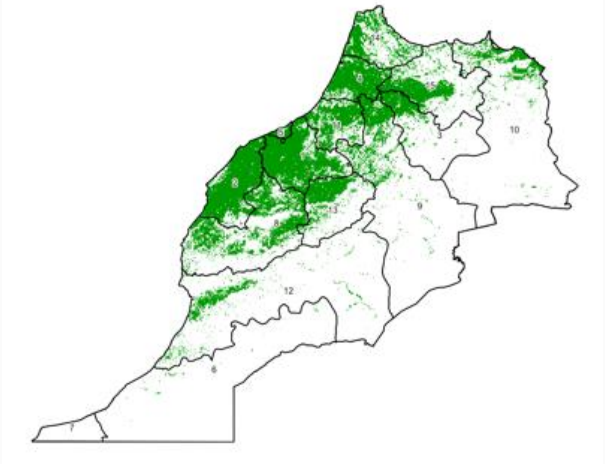
Croplands cover a small proportion of total land area, accounting for 3.5% of Egypt, 5.2% of Jordan, 16.5% of Morocco, and 10.6% of Tunisia

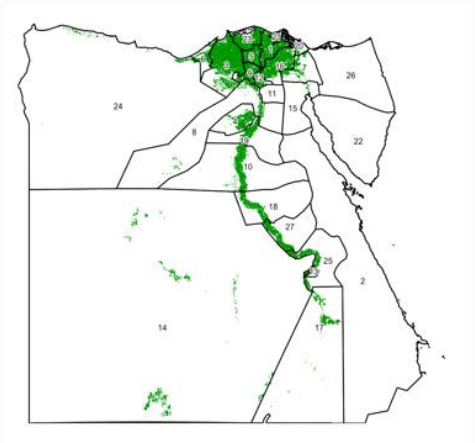


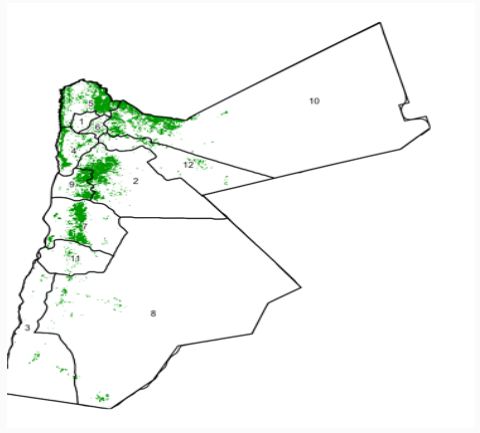


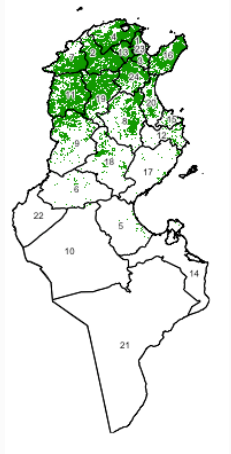




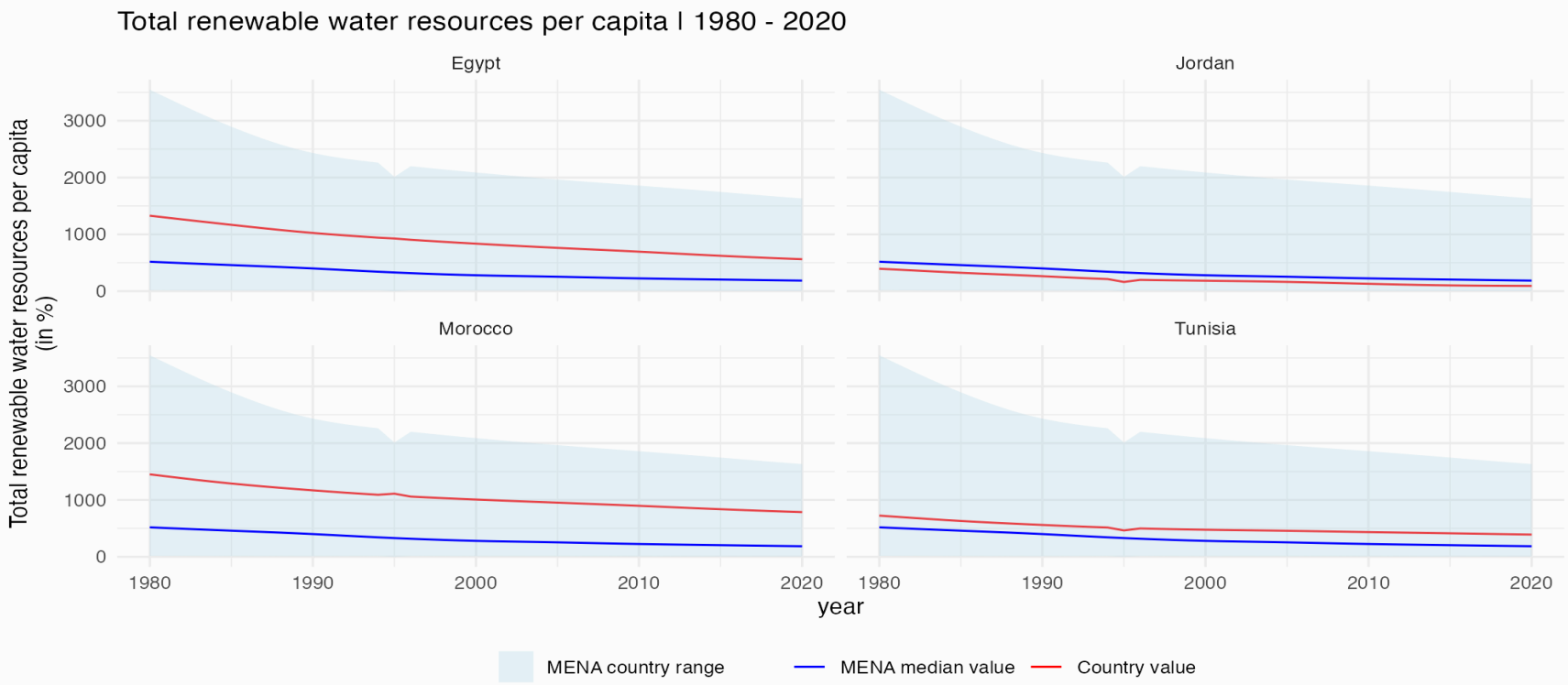








Most countries face extreme water scarcity

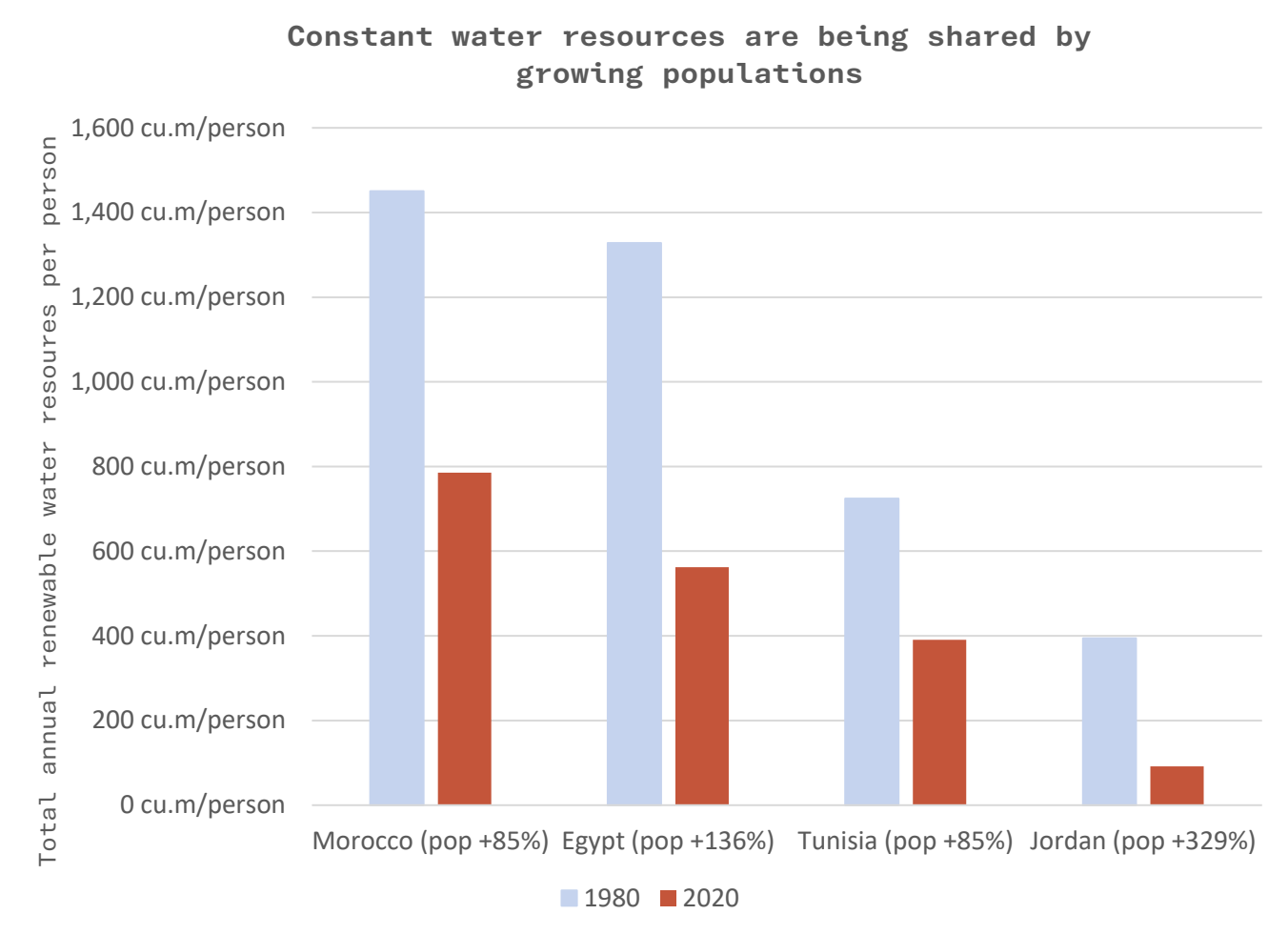


Source: FAO Aquastat 2024

- Water availability per capita is alarmingly low, with all countries except Morocco, falling well below the threshold of 500 m3 per capita per year.

- Future water scarcity is a concern due to low per capita water availability and a growing population, combined with feared reductions in rainfall and more frequent droughts from climate change in some countries

Per capita renewable water resources: regional trends and scarcity levels

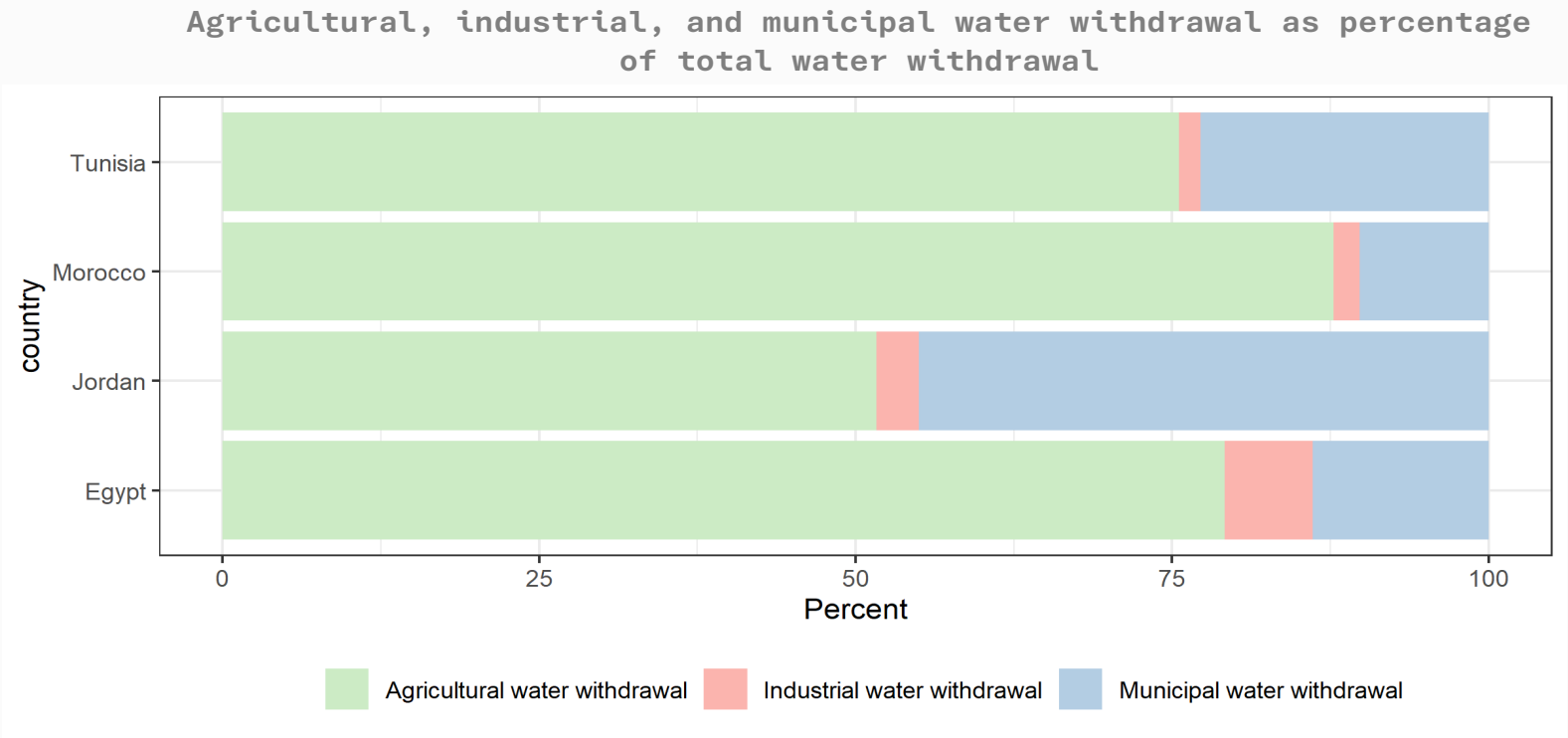


While water resources remain constant in each country, populations are growing, thus reducing per capita availability over the last 40 years.

Jordan stands out for low available renewable water resources per capita, followed by Tunisia, Egypt and Morocco.

Source: FAO Aquastat, 2024

The agricultural sector is the primary water consumer in the region, and irrigation accounts on average for 85% of water use



Date: 2020. Source: FAO Aquastat Nations 2024

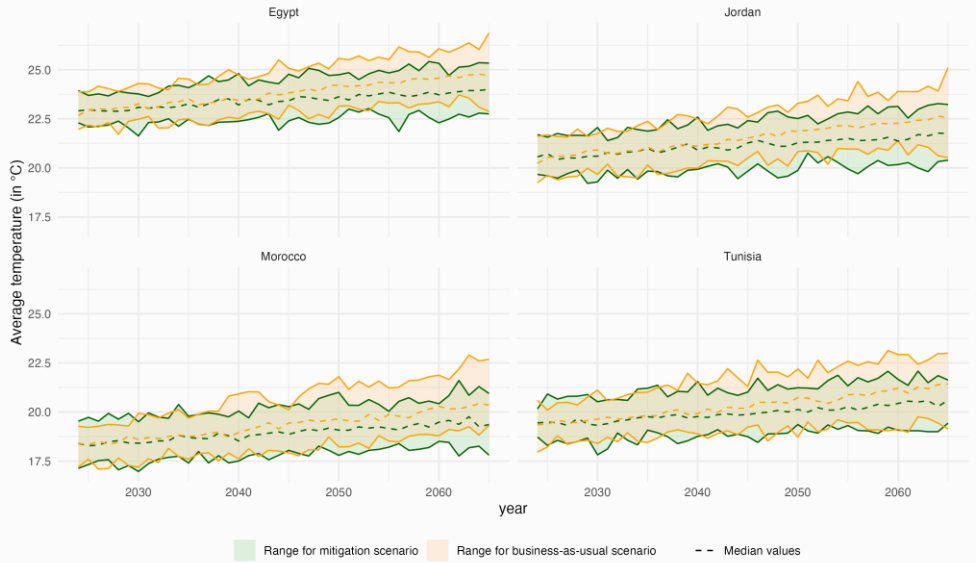
- In Tunisia, Egypt, and Morocco, the agricultural sector accounts for a larger proportion of water usage than the global average, putting a strain on water resources.
- Much of the water used in agriculture is lost to the atmosphere, whilst much of industrial and municipal water abstraction is returned to surface waters
- Almost all of Egypt's agricultural land is irrigated, compared to 43% in Jordan. This figure is 16% in Morocco and 8% in Tunisia.

The region is vulnerable to climate change due to its arid nature and limited water resources

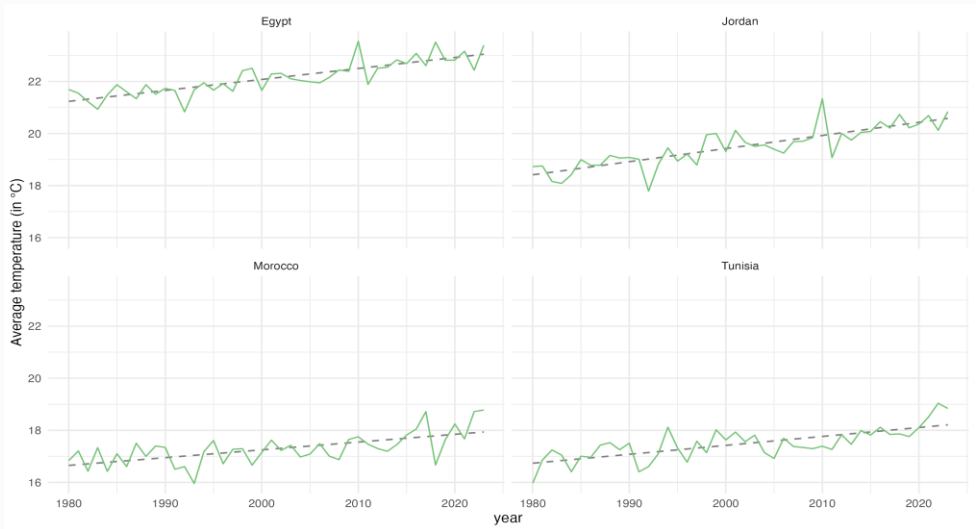
The region's climate is characterized by both aridity and recurrent droughts, leading to water scarcity that negatively affects agriculture, ecosystems, and livelihoods.

- The selected countries have relatively warm climates with average annual temperatures above 18°C
- Since 1980, average temperatures (in cropland areas) have been steadily rising, with projections indicating further increases from 2023-2065, posing threats to agriculture and livelihoods.

Temperatures: projected time series



Average temperature: historical time series



Data Source: *ECMWF – ERA5 (Hersbach et al. 2020) and NEX-GDDP-CMIP6 (Thrasher et al. 2012)*

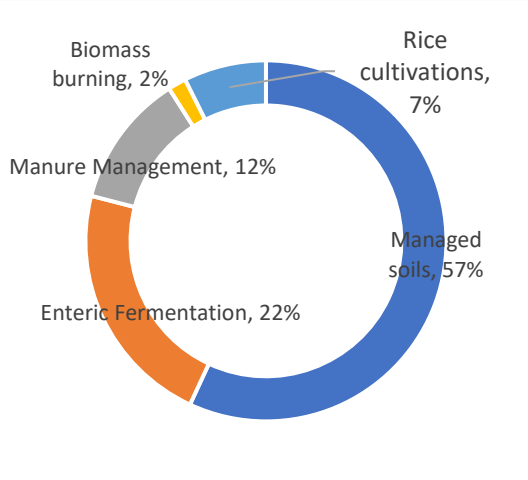
Climate change is projected to have significant impacts on agricultural production in the SEMED countries through 2040, particularly affecting the cultivation of staple crops

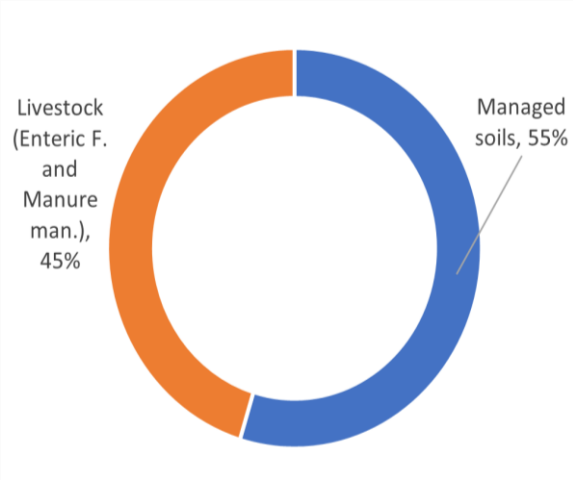
- The GAEZ assessment calculates changes in moisture and thermal regimes, alterations in potential yields under both irrigation and rainfed conditions, and variations in total production within existing harvest systems.
- While yields of all major crops are increasing globally, climate change threatens to slow or ultimately reverse yield growth
- The assessment shows that changes in moisture and thermal regimes will have important effects on the pace of yield growth:
  - Significantly slower growth is expected for crops like wheat, barley and vegetables in Morocco.
  - Reductions in yield growth of wheat, barley, and potatoes is expected in Tunisia
  - Limited impact on crop yields is expected in Egypt, where almost all production is irrigated.
  - Impact in Jordan should to be relatively minor, with exception of decrease in yield growth for fruit and increase for barley.

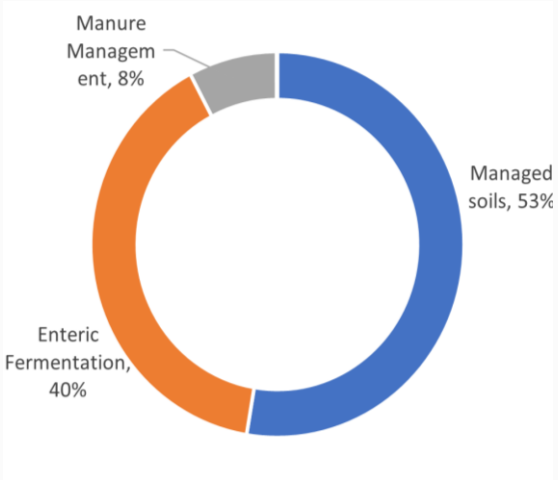
Potential changes (%) in national agricultural outputs in the SEMED under climate change in the near-term (2011-2040)

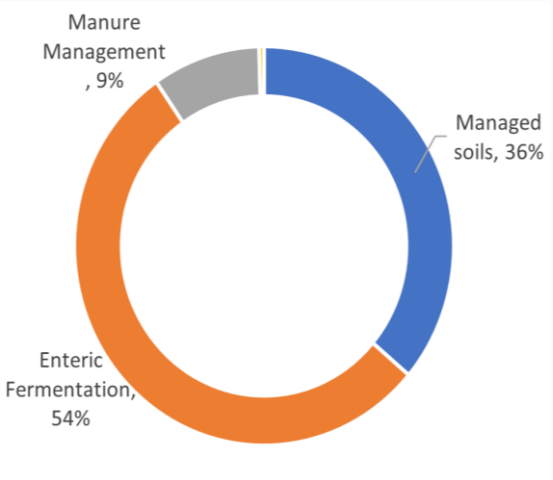
	Morocco	Tunisia	Egypt	Jordan
Wheat	-22%	- 8%	- 0.2%	+ 2.6%
Potato	-14%	- 3%	- 1.2%	- 1.7%
Barley	-34%	-11%	- 0.1%	+ 7%
Vegetables	- 6%	+ 1%	- 1.8%	- 1.5%
Temperate fruit	- 6%	-13%	0%	-13%
Sugarbeet	+16%	n/a	+ 2%	n/a

GHG emissions from agriculture and Revised National Climate Goals (NDCs)









Sources: Latest National Communications to the UNFCCC

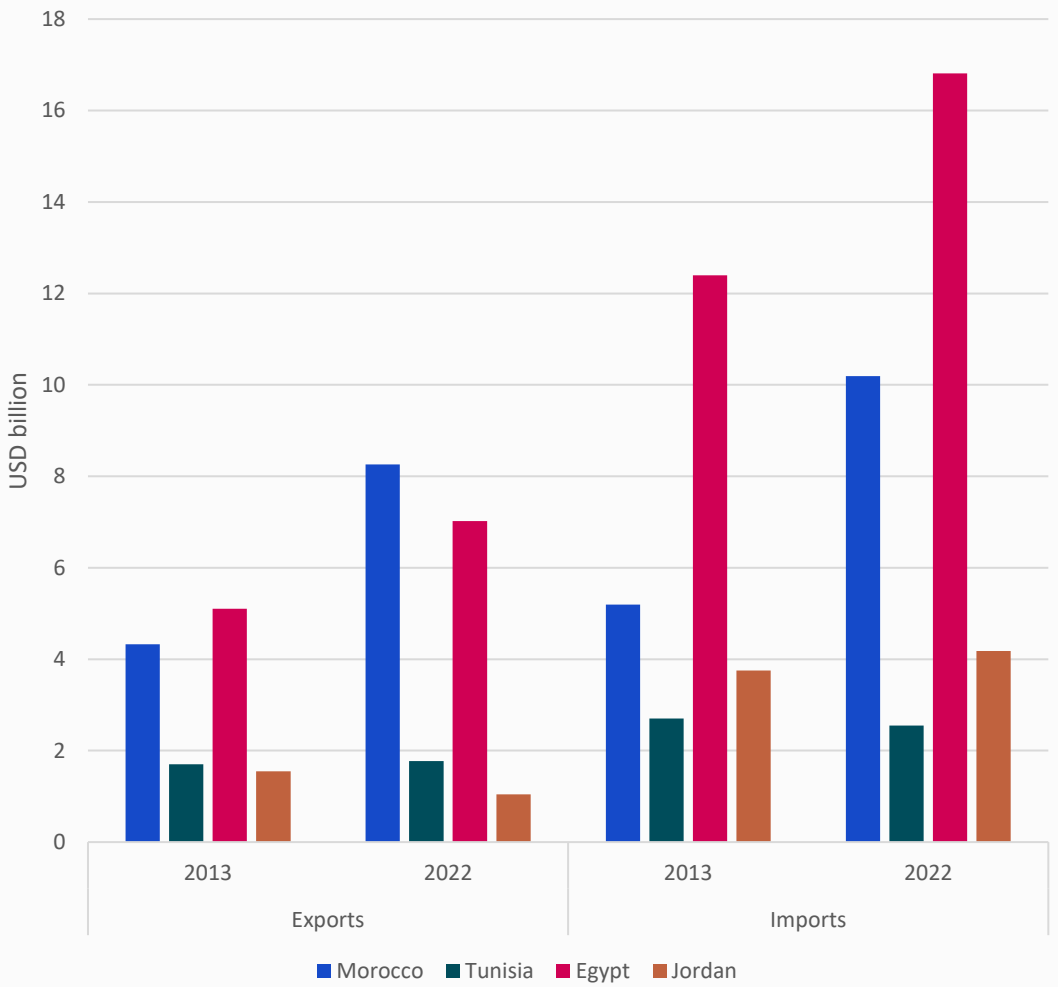
- Greenhouse gas emissions from agriculture emissions stem mainly from enteric fermentation (ruminants) and managed soils (fertilizers and manure), though per capita emissions (total & agricultural) are below the global average
- All four countries have increased ambitions in their revised Nationally Determined Contributions (NDCs), though each faces formidable challenges in implementation

Summary

- The predominant land cover in the SEMED countries is bare desert, with agricultural areas primarily concentrated along main river valleys.
- The region is vulnerable to climate change due to its arid nature and scarce water resources. Agriculture is the primary water consumer.
- Future water scarcity is a concern due to low per capita water availability and a growing population, combined with feared reductions in rainfall, rising temperatures and more frequent droughts from climate change in some countries.
- Climate change is projected to have significant impacts on agricultural production in the SEMED countries through 2040, particularly affecting the cultivation of rainfed crops.
- Greenhouse gas emissions from agriculture emissions stem mainly from enteric fermentation (ruminants) and managed soils (fertilizers and manure), though per capita emissions (total & agricultural) are below the global average.
- All four countries have increased ambitions in their revised Nationally Determined Contributions (NDCs), though each faces formidable challenges in implementation.

Agricultural trade: focusing on resilience to ensure food and nutrition security for all

Growing trade amid heightened vulnerability

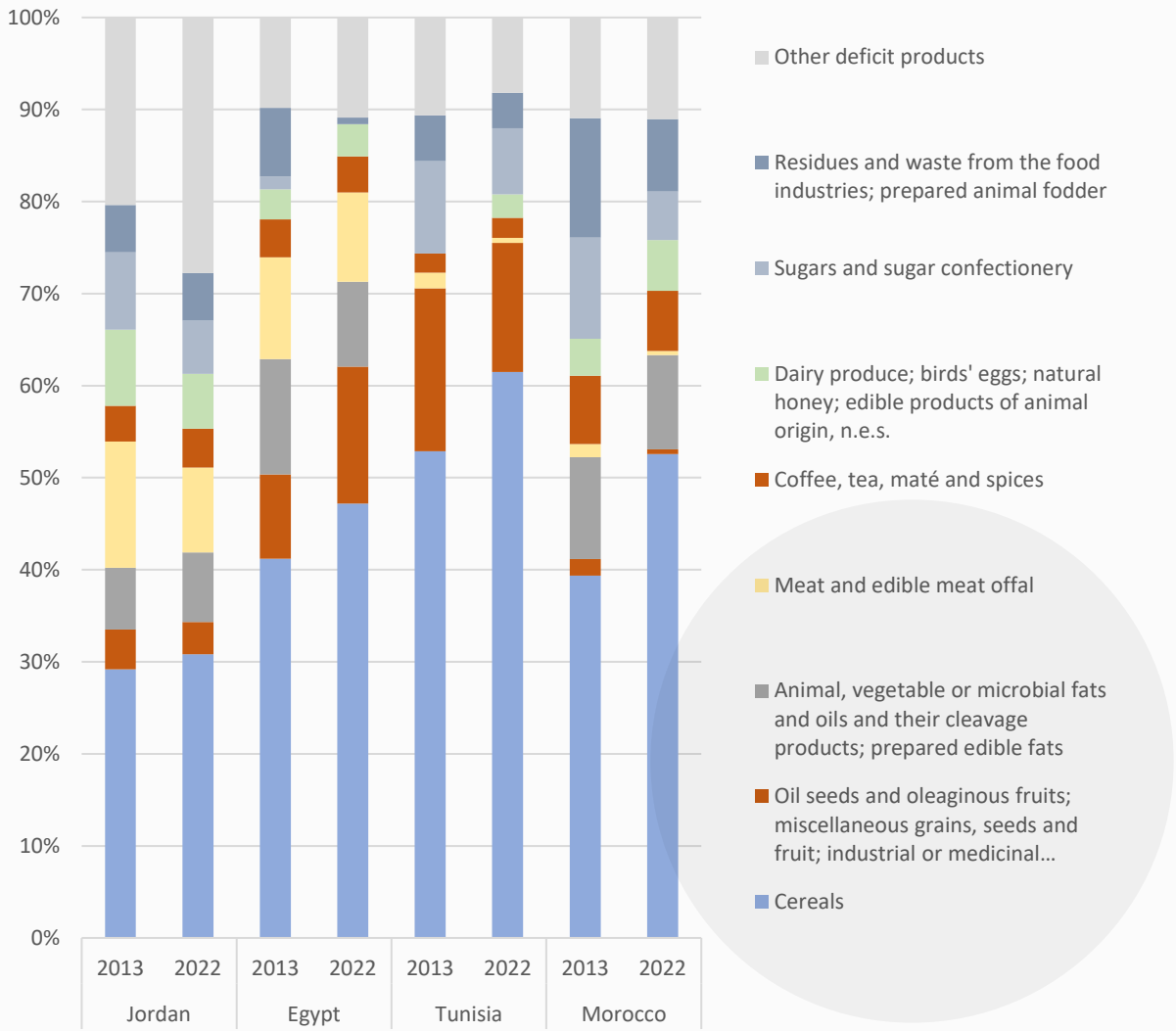


Growing trade amid heightened vulnerabilities

- **Total agricultural trade in SEMED grew by 41% from 2013 to 2022.**
- Agri-trade doubled in Morocco, grew by 36% in Egypt, and stagnated in Tunisia and Jordan.
- **SEMED countries' trade deficit grew by 38%,** fueled by Morocco's doubling deficit growth. The entire south and eastern Mediterranean except Türkiye has agricultural trade deficit.
- Relative to GDP, agri-trade deficit is highest in Jordan (7%, ↗) followed by Egypt (2%, ↔), Tunisia (2%, ↔) and Morocco (1%, ↗).

Source: International Trade Center (ITC). 2023. Trade map. https://www.trademap.org/Index.aspx

Growing cost of imports, especially cereals, amid heightened vulnerabilities

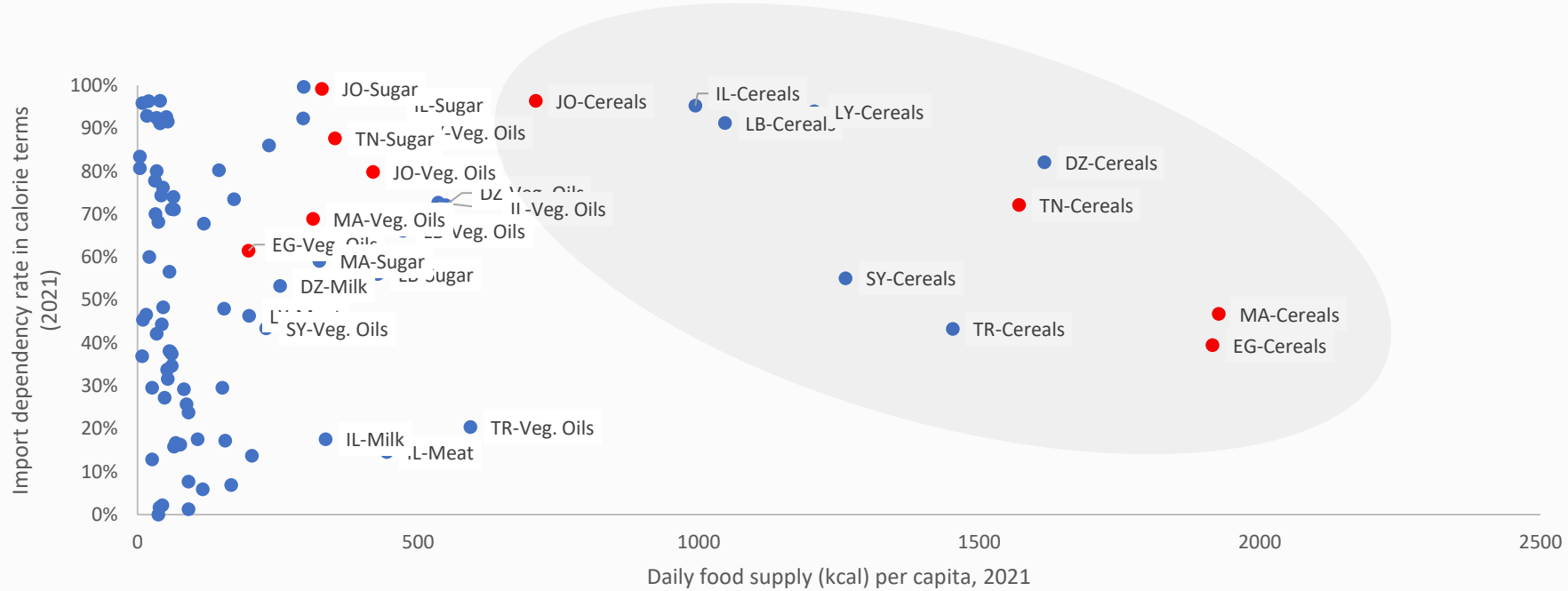


- **Sources of agri-trade deficit in SEMED include cereals, vegetable oil seeds, animal/vegetable fats and oils, meat and offal, coffee and tea, and dairy products.**
- The share of cereals in agrifood trade deficit jumped from 43% in 2013 to 52% in 2022 in value terms. The increase was highest in Morocco (14 pp) followed by Tunisia (8 pp), Egypt (6 pp), and Jordan (2 pp).
- Regional cereal trade deficit grew due to rising global cereal prices after September 2020 and the outbreak of the war in Ukraine in February 2022.

Source: International Trade Center (ITC). 2023. Trade map. https://www.trademap.org/Index.aspx

Closer look at major import dependent products

Import dependency rate in calorie terms and per capita daily calorie supply from cereals in 2021 in south and eastern Mediterranean.



Food and Agriculture Organization (FAO). 2023. Food Balances 2010-. https://www.fao.org/faostat/en/#data/FBS
Notes: Values exceeding 100 percent implies that the country imports more than it supplies domestically at the given year.

Jordan and Tunisia have highest cereals import dependency ratio in terms of calories supply

Cereals stand out as a key product group in terms of import dependance and greater weight in daily diets.

Relative to 2012, considering all food items, import dependency rate in calorie terms increased in Tunisia (from 58 to 72%), was similar in Egypt (42 to 39%) and Jordan (97 to 96%), and declined in Morocco (61 to 47%).

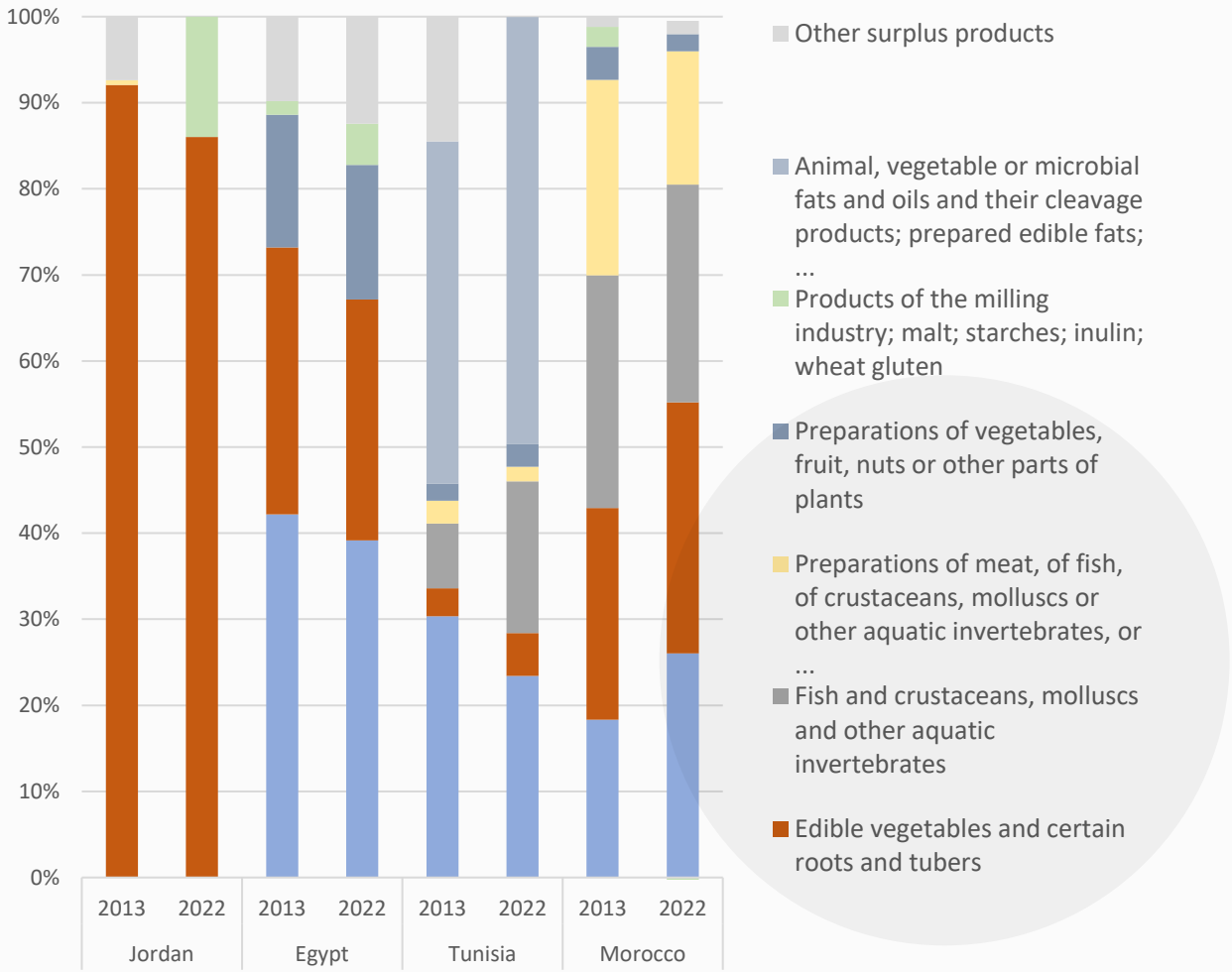
SEMED relies on a few suppliers in cereals, oil seeds, vegetable oils, and agri-inputs despite signs of diversification efforts

			Top import partner #1			Top import partner #2			Top import partner #3				
	Product	Relative share in total trade deficit in 2022		Relative share in 2022	Percentage point change from 2013		Relative share in 2022	Percentage point change from 2013		Relative share in 2022	Percentage point change from 2013	Concentration of suppliers (Herfindahl index) in 2022	Average distance of supplying countries (km) in 2022
Egypt	Cereals	20%	Latin America	31%	6	Russian Federation	30%	18	EU	25%	7	0.18	5262
Jordan	Cereals	9%	EU	49%	26	Rest of World	24%	-7	America	22%	-5	0.24	6246
Morocco	Cereals	12%	EU	54%	30	Latin America	29%	3	North America	14%	3	0.22	4650
Tunisia	Cereals	47%	Rest of World	34%	13	EU	29%	-20	North America	15%	10	0.11	2881

- Cereals are by far the largest component (52 percent) of trade deficit for the SEMED region in value terms, and the deficit has increased since 2013.
- SEMED has increasingly sourced deficit products from the EU and Russia while regional trade with greater SEMED region has stagnated.
- In high-deficit agricultural products, Egypt has the highest concentration of suppliers (Herfindahl index: 0.28) followed by Jordan (0.24), Morocco (0.21), and Tunisia (0.19) highlighting the need to diversify the supplier portfolio.

Diverse set of agrifood exports, with concentration in EU

Composition of agricultural trade surplus in SEMED countries, 2013 and 2022 (excluding agri-inputs)



- Top trade surplus generators are fruits and vegetables (and their preparations), fish and crustaceans, and preparations of meat, fish and crustaceans. There are individual country stories behind the promotion of agrifood exports such as olive oil in Tunisia, citrus in Egypt, tomato in Morocco and Jordan.
- The region exports these products mainly to the EU (49%), greater SEMED (8%), Latin America (1%), non-SEMED GAFTA (12%), North America (6%), Russian Federation (5%), and other markets (such as UK, Japan, and Türkiye) (19%). Agri-food export destinations remain concentrated (less in Egypt).

Source: International Trade Center (ITC). 2023. Trade map. https://www.trademap.org/Index.aspx

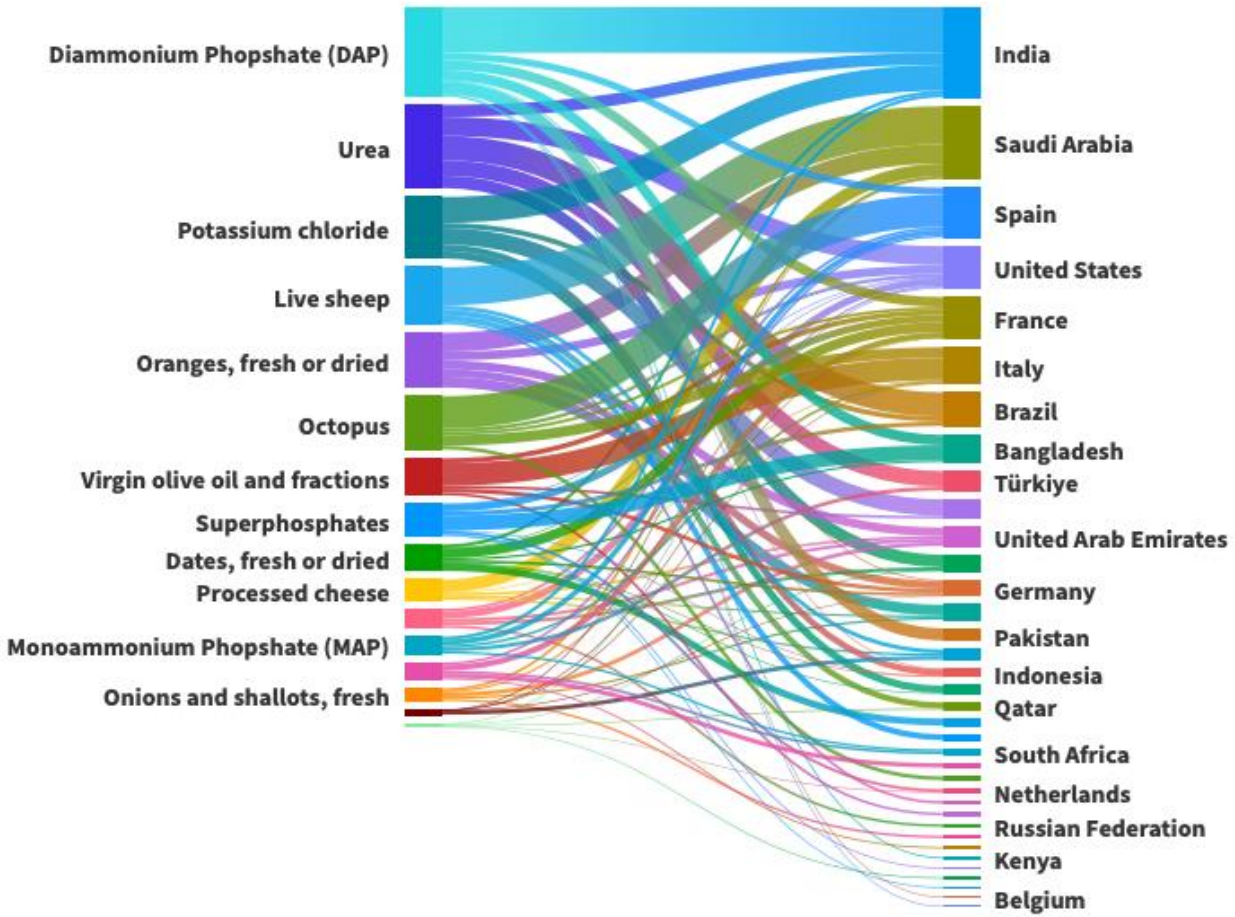
Zooming in on agricultural input trade in SEMED countries

- Agricultural inputs (machinery and equipment, seed and seedling, fertilizers, and pesticides) make up 7% of total trade - higher than the world average of 3% in 2022.
- Fertilizers predominate agri-input trade and the trade surplus in fertilizers is a source of foreign currency. The region's fertilizer exports almost tripled in 2013-2022 period in value terms.
- No major trade deficits in any of the fertilizer sub-categories. Jordan is a powerhouse in potassium with 16% annual export value increase in the last five years. Egypt is leading in nitrogen with 9% annual export value increase Morocco is a global supplier of phosphate fertilizers with 24% annual export value increase. To a limited extent, Tunisia is focusing on phosphate and related fertilizer blends.
- Fertiliser is produced in each country: Egypt uses its natural gas & phosphate rock; Jordan uses its phosphate rock & potassium chloride from the Dead Sea; Morocco uses its phosphate rock; Tunisia uses its phosphate rock,
- In the agri-machinery category, trade balance turned positive in Tunisia, improved in Egypt (by 43%) and Jordan (by 26%) but worsened in Morocco (by 59%) from 2013 to 2022.

Agrifood exports have potential

- **Egypt** has unrealized potential (USD 2.8 billion) in fertilizers, oranges, grapes, onions, and cheese. It can increase its exports to Brazil, Canada, Iraq, Saudi Arabia, Türkiye, United Arab Emirates and United States.
- **Jordan** has unrealized potential (USD 1.4 billion) in fertilizers, live sheep, tomato, and dates. It can significantly increase its exports to China, India, Indonesia, Malaysia and Saudi Arabia.
- **Tunisia** has unrealized potential (USD 0.7 billion) in olive oil, dates, fertilizers and maize oil. It can further its exports to the EU, India and Morocco.
- **Morocco** has unrealized potential (USD 2 billion) in fertilizers, octopus, and sardines. It can further its exports to the EU, Bangladesh, India and Pakistan.

Top agri-products with the highest export potentials and their respective markets for SEMED



Trade map. https://www.trademap.org/Index.aspx

Summary

- Agricultural trade is a key driver of resilience in agrifood systems and improved food security and nutrition outcomes.
- Total agricultural trade in SEMED grew by 41% from 2013 to 2022, and agri-trade deficit grew by 38%. The key net imports to SEMED countries are cereals, oilseeds, fats and oils, meat, coffee and tea, and dairy products.
- Cereals stand out in terms of import dependance and greater weight in daily diets. Relative to 2012, considering all food items, the import dependency rate in calorie terms increased in Tunisia, was similar in Egypt and Jordan, and declined in Morocco.
- Top trade surplus generators are fruits and vegetables (and their preparations), fish and crustaceans, and preparations of meat, fish and crustaceans.
- Fertilizers dominate agri-input trade, and the region's fertilizer exports almost tripled in value over 2013-2022.
- Many opportunities exist for strengthening SEMED countries' agrifood systems resilience through trade, including realizing export potentials, diversifying export products and destinations, and improving import efficiency, facilitating trade.

Policies strategic direction

Improving food security, nutrition and livelihoods

- Prioritize addressing structural weaknesses, promote economic growth, and improve access to healthy and nutritious food to enhance food security and nutrition.
- Continue the shift from generalized subsidies to targeted assistance for vulnerable populations with healthier diets.
- Ensure food security and nutrition through sustainable rural development, agricultural innovation, climate change adaptation and preparedness, and technology investments in agri-food sector infrastructure (production, consumers, value chains, and trade).
- Address gender disparities to create more inclusive and resilient food systems.

Enhancing agriculture production and agrifood sector performance

- Prioritize agriculture and agro-industry transformation as a labor-intensive and pro-poor growth strategy, considering high poverty levels.
- Enhance processing, retail, and distribution channels to reduce food losses and increase efficiency in the food system.
- Focus on middle value chains for greater value addition and better market linkages.
- Leverage the private sector's potential in the agri-food sector to drive innovation, investment, and market development.
- Implement policy reforms to address structural weaknesses in the economy, improve the business environment, and foster private sector growth.

Policies strategic direction

Addressing agrifood sector resilience and sustainability

- Prioritize addressing structural weaknesses, promote economic growth, and improve access to healthy and nutritious food to enhance food security and nutrition.
- Continue the shift from generalized subsidies to targeted assistance for vulnerable populations with healthier diets.
- Focus on enhancing agricultural inputs (seeds, fertilizers), optimizing water resources, and implementing climate-smart techniques to improve productivity, resilience, and adaptability to climate, water and land.
- Address access to finance, soil health, and extension services specialized to adapt to climate change and water scarcity scenarios to ensure the sector's resilience and sustainability

Building efficient trade systems for better added value

- Utilize international and regional trade, collaboration, tailored management, diversification, and broadening trade relations to mitigate external shocks and ensure a diverse and secure food supply.
- Harmonize agricultural trade policies with production policies, social protection, environmental, fiscal, health, and nutrition policies to strengthen agri-food systems' resilience.
- Intra-regional trade within the greater SEMED region can be a key pillar for agrifood systems’ resilience in the face of food supply disruptions.
- Export strategies and import-substitution strategies in key products must consider social and environmental compliance.

Thank you

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