

# MED-Amin

Réseau méditerranéen d'information sur les marchés agricoles  
Mediterranean Agricultural Market Information Network

## Sécheresse

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## Edito

The 2024/25 season was marked by disappointing wheat and barley harvests in parts of the MED-Amin countries, particularly in the western Maghreb and France. In Western and Northern Europe, adverse agrometeorological conditions further impacted grain **quality**. Excessive rainfall throughout the season led to high weed and disease pressure, while insufficient sunlight during the critical grain-filling stage raised concerns among affected countries. Additionally, autumn rains delayed the corn harvest and increased the risk of mycotoxin contamination<sup>1</sup>.

In France and Germany, wheat test weights were particularly affected by the lack of sunlight, and protein content fell below the five-year average (11.4% for soft wheat)<sup>2,3</sup>. While Germany saw a lower than usual share of high-quality wheat for industrial processing, France's results were not as poor as initially feared, with satisfactory technological characteristics for processing.

With climate change driving increasing weather variability, a special attention on the wheat quality should be paid to increase market transparency. This highlights the need for a sustained dialogue between exporting and importing countries to anticipate trade possibilities and limitations. The MED-Amin network, through its role in facilitating exchanges among Mediterranean countries—particularly via **webinars with importing and exporting countries**, co-organized with the International Grains Council (IGC)—helps to ensure

the early dissemination of critical market information.

Moreover, grain quality is assessed based on a wide range of criteria and requirements, which vary across industries, exporting and importing countries. These include physical and chemical parameters (test weight, moisture content, sprouted grains, etc.), technological characteristics (protein content, baking strength, etc.), and sanitary standards (presence of mycotoxins, pesticide residues, etc.). Other influencing factors (dominant wheat varieties, varietal innovation, etc.) and methodologies for harvest monitoring and quality controls, are not always well known nor harmonized across countries.

To enhance the availability and timeliness of wheat quality information and to foster information exchange between cereal exporters and importers, the MED-Amin network and the IGC launched a **joint survey on wheat quality criteria** in February 2024. We sincerely thank all IGC and MED-Amin member countries that have already contributed to this initiative, and encourage other countries to participate. The responses are being analysed with the aim of sharing, depending on the willingness of participating countries, part of the information in a database

with restricted access to members through IGC and MED-Amin member websites. These data will be updated periodically, particularly to incorporate new responses and information. We will keep you updated on the progress of this initiative in the coming months, which we see as a key step toward establishing a Mediterranean early warning system.

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<sup>1</sup> [AMIS Market Monitor - No. 125 February 2025 \(AMIS\)](#); [Alltech 2024 European Harvest Analysis initial results reveal the impact of fluctuating weather conditions on mycotoxin risk levels \(November 7, 2024\) \(Alltech\)](#); [Alltech 2024 European Harvest Analysis highlights rising mycotoxin risks and strategies for proactive management \(December 12, 2024\) \(Alltech\)](#)

<sup>2</sup> [Qualité des blés tendres français - À l'entrée des silos de collecte - Récolte 2024 \(Septembre 2024\) \(Arvalis & FranceAgrimer\)](#)

<sup>3</sup> [Qualité des blés durs français - À l'entrée des silos de collecte - Récolte 2024 \(Septembre 2024\) \(Arvalis & FranceAgrimer\)](#)

## LEBANON

## Iraq to provide Lebanon with 320,000 tons of wheat

*(IraqNews, 06/12)*

The Iraqi Deputy Minister of Trade, Sattar Al-Jaberi, announced that Iraq is undertaking an initiative to deliver 320,000 tons of wheat to Lebanon.

## EGYPT

## Mostakbal Misr has taken over wheat buying

*(Reuters, 06/12)*

An Egyptian military agency has taken over the country's import of strategic commodities, a letter seen by Reuters showed, replacing a decades-old state institution to take over international buying tenders and also conduct direct purchases which have in recent weeks shaken the wheat market.

## FRANCE

## Soft wheat area estimate raises to 4.57 million hectares

*(Business Recorder, 12/02)*

France's agriculture ministry increased its estimate of the area sown with winter soft wheat for the 2025 harvest to 4.57 million hectares from 4.51 million in its initial projection in December.

## TÜRKIYE

## Wheat import ban leads to sharp decline in flour exports

*(Miller Magazine, 17/12)*

The wheat import ban, which began in Turkey in June of last year, has impacted the Turkish flour industry, which has held the title of world flour export leader for years. According to the latest TURKSTAT data, Turkey's flour exports in 2024 decreased by 20.9% in dollar terms, totalling \$1.159 billion. In terms of volume, wheat flour exports dropped from 3.648 million tonnes in 2023 to 3.022 million tonnes in 2024, representing a 17.2% decline.

## Sécheresse : une situation préoccupante au Maroc

## Des conditions de sécheresse marquées en Afrique du nord

Les derniers rapports du **Centre Commun de Recherche** de l'Union européenne indiquent que plusieurs régions de MED-Amin sont affectées par des conditions de sécheresses, notamment au Maroc. Selon le dernier rapport de **Copernicus** « Des conditions sévères, durables et critiques persistent en Méditerranée, au Moyen-Orient et dans la région de la mer Noire. La péninsule ibérique est confrontée à des conditions critiques, avec des impacts très marqués dus à l'alternance de périodes de sécheresse et de précipitations intenses. Dans le sud-est de l'Espagne, la végétation reste affectée. L'étendue spatiale de la sécheresse dans les Balkans diminue lentement. Certaines zones de la région méditerranéenne, en particulier dans le sud-est de l'Espagne, sont soumises à des conditions d'alerte à la sécheresse persistantes, avec des impacts sur la végétation. Cette sécheresse sévère et prolongée est encore plus intense et s'aggrave dans certaines régions du Maroc, de l'Algérie et de la Tunisie, entraînant des impacts significatifs. Des conditions d'alerte se développent dans le sud-est de la Turquie, en Syrie et dans le nord de l'Irak. » (*Copernicus - 7 février 2025*). Le dernier rapport du **CCR-ASAP** (Anomaly Hotspots of Agricultural Production) précise que « En Afrique du Nord, en raison des très faibles précipitations enregistrées depuis novembre 2024, l'état des céréales est médiocre à très médiocre en Algérie (sauf dans le nord-est), au Maroc et dans le centre-ouest de la Tunisie. De faibles précipitations sont prévues pour février et mars 2025, ce qui laisse entrevoir des perspectives pessimistes pour les céréales d'hiver dans la plupart des régions » (*ASAP - 7 février 2025*).

## Inquiétudes pour la campagne à venir

Cela entraîne des craintes pour la campagne céréalière à venir, comme le soulignait déjà le site AgriMaroc mi-décembre : « Le Maroc traverse actuellement une période de stress hydrique marquée par deux mois consécutifs

sans précipitations dans plusieurs régions du pays, notamment dans le centre et le sud. Cette situation met gravement en péril la campagne céréalière, en particulier dans les zones bour, qui dépendent exclusivement des pluies. » (*AgriMaroc - 17 décembre 2024*). Toujours selon AgriMaroc, « Les retenues des barrages à usage agricole ont atteint 3,9 milliards de mètres cubes (m³), soit un taux de remplissage de 28% [selon] le ministre de l'Agriculture, de la Pêche maritime, du Développement rural et des Eaux et Forêts, Ahmed El Bouari » début décembre 2024 (*AgriMaroc - 05 décembre 2024*). Malgré des pluies enregistrées en janvier (98 mm selon les données du ministère de l'Agriculture, à un niveau proche de l'année dernière mais bien inférieur à la moyenne quinquennale), « La campagne agricole 2024/2025 traverse une période critique, marquée par un déficit hydrique inquiétant. Alors que les précipitations se font attendre, l'ensemble du secteur agricole est en alerte, redoutant une année particulièrement difficile » (*AgriMaroc - 13 février 2025*).

## Une difficulté structurelle

Une difficulté de plus en plus structurelle que souligne le dernier rapport de la **Banque Mondiale** sur les **Perspectives économiques mondiales** publié en janvier 2025 : « la rareté de l'eau représente l'un des plus grands défis environnementaux et économiques auxquels sont confrontés le Maroc et la Tunisie dans la région » (*World Bank - Global Economic Prospects - 05 janvier 2025*).

## Barley History and Breeding in Spain

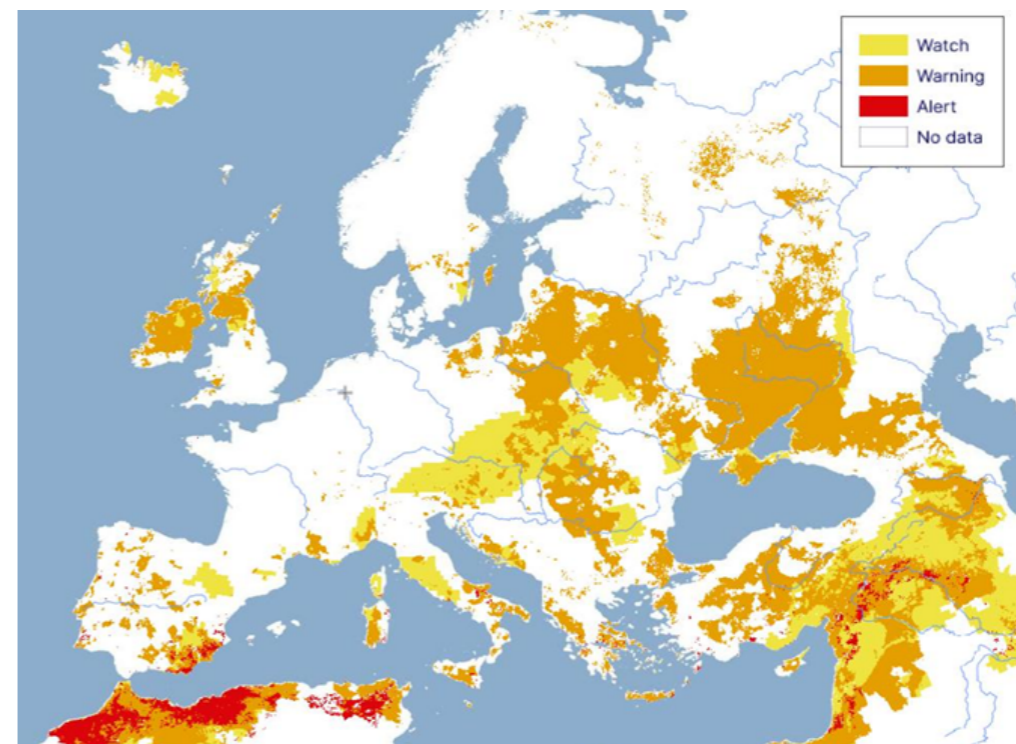
*Martinez-Moreno, F.; Solís, I.; Igartua, E. Barley History and Breeding in Spain. Agriculture 2024, 14, 1674.*

Barley has been and continues to be a crucial field crop in Spain, with approximately 2.4 million hectares planted annually and a production ranging 7–10 million tons. It is a crop well adapted to shallow soils and the harsh winters of the high central plains of the country. Traditionally, animal feed has been the main use for this crop, while an important

brewing industry developed throughout the 20th century. This article reviews the most important milestones of this crop in Spain, including its uses, historical yield, barley price, and barley-wheat price relationship. With respect to the collection of Spanish landraces currently preserved in the CRF (Plant Genetic Resources Center) seed bank, two main genetic groups distributed in northern and southern Spain were distinguished. The landraces of both groups are mostly six-

row and winter types, but they differ in vernalization requirements, which are lower in southern landraces. The trends in barley production, the most planted cultivars in Spain over the last 70 years, and the past and present-day breeding programs in the country are also reviewed.

➔ Read the [article here](#)



Drought in Europe and North-Africa - January 2025 -3rd ten-day period EU, 2025 (Copernicus)

## TUNISIE

## Près de 950 000 hectares consacrés aux céréales pour la saison 2024/2025

*(AgriTunisie, 09/01)*

La Tunisie a alloué près de 950 000 hectares à la culture des céréales pour la saison agricole 2024/2025, avec la mise à disposition de 120 000 tonnes d'ammonitrate destinées aux grandes cultures.

## FRANCE

## Les ressources et la sole de blé dur au plus bas depuis 30 ans

*(Terre-net, 23/01 ; Terre-net, 10/01)*

À 1,457 Mt d'après la dernière estimation de FranceAgriMer, le volume de blé dur disponible pour le marché est au plus bas depuis la campagne 1995/96. Ce sont surtout les exportations qui devraient en pâtir, avec une chute de 38 % par rapport à 2023/24.

Estimées à 206 218 ha pour la campagne 2024/25, les surfaces de blé dur enregistreraient leur plus bas niveau depuis 30 ans selon les dernières données Agreste.

## FRANCE

## Une campagne commerciale délicate pour les céréales françaises

*(FranceAgriMer, 23/12)*

FranceAgriMer a révisé à la baisse ses prévisions d'exportations de céréales françaises pour la campagne commerciale en cours, face au repli des achats chinois et à la compétitivité des origines Mer noire notamment russes, vers les pays du Maghreb, en première partie de campagne.

## CANADA

## Durum production down 12%

*(World Grain, 28/01)*

The forecast for Canadian durum in 2025-26 was for smaller seeded and harvested areas, lower yield and lower production. AAFC projected durum production in 2025 at 5.152 million tonnes, down 718,000 tonnes, or 12%, from 5.870 million tonnes in 2024.

## SPAIN

## Farmers have sown +81 000 ha of cereals (y/y)

*(Agrodigital, 29/01)*

Spanish farmers have sown more area of autumn-winter cereals than last season. They have sown 81,000 ha more to reach 3.07 Mha (2.7% more than in autumn 2023), according to the first estimates published by the MAPA.

## ALGERIE

## L'Algérie renforce ses importations de blé russe et devient un marché clé

*(AgriAlgerie, 30/01)*

Selon les chiffres du centre russe d'analyse Rusagrotrans, relayés par Agroexport, l'Algérie a importé 2,8 millions de tonnes de blé russe en 2024, marquant une progression significative par rapport aux années précédentes.

## UE

## La Commission européenne propose de taxer les engrais russes

*(Réussir, 30/01)*

Bruxelles propose d'imposer des droits de douanes sur les engrais azotés provenant de Russie pour réduire la dépendance de l'Union européenne. La Copa-Cogeca (regroupement d'organisations syndicales et professionnelles agricoles et coopératives) s'inquiète de hausses de prix potentielles de 40 à 45 euros par tonne d'engrais pour les agriculteurs.

## SCOOPS

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➔ [Website MED-Amin](#)

➔ [LinkedIn MED-Amin](#)

## Climate change and agronomic management: addressing wheat yield gaps and sustainability challenges in the Mediterranean and MENA regions

*Tita, Davide & Mahdi, Dr. Karrar & Devkota, Krishna & Devkota, Mina. (2025). Climate change and agronomic management: Addressing wheat yield gaps and sustainability challenges in the Mediterranean and MENA regions. Agricultural Systems. Volume 224. 10.1016/j.agsy.2024.104242.*

Wheat is a crucial crop for food and nutritional security in Mediterranean and MENA regions, yet it faces significant challenges due to high yield variability, low average productivity, and substantial yield gaps. This highlights the urgent need for improved agricultural practices to enhance its productivity and resilience. The

region's climate change, soil degradation, and water supply variability significantly impact wheat production, requiring innovative and integrated solutions to minimize yield gaps and improve sustainability. The primary objective of this study is to evaluate the impacts of climate change and agronomic management practices (supplementary irrigation, nitrogen fertilizer, planting date) on wheat yields across diverse agro-ecological zones in the Mediterranean region under current and future climate scenarios. Using advanced crops modeling DSSAT (Decision Support

System for Agrotechnology Transfer) and scenario analysis, wheat yields were simulated under RCP 4.5 and RCP 8.5 climate scenarios for 11 representative sites of 7 countries, for the time periods 2010-2040, 2040-2070, and 2075-2099. Wheat yields across all regions are projected to decline by -18% to -20% under RCP 4.5 and RCP 8.5 by 2040, -28% to -27% by 2070, and -30% to -28% by 2099, compared to historical averages.

➔ Read the [article here](#)

### REPORT: Special Report Interlinking climate change with the Water – Energy – Food – Ecosystems (WEFE) nexus in the Mediterranean Basin

Drobinski, P., Rivera-Ferre, M.G., Abdel Monem, M., Driouech, F., Cramer, W., Guiot, J., Gattacceca, J.C., Marini, K. MedECC Reports. MedECC Secretariat, Marseille, France, 264 pp., ISBN: 978-2-493662-09-5  
doi: 10.5281/zenodo.13365388

The Mediterranean region is currently dealing with critical global challenges, including water scarcity, food and energy insecurity, and ecosystem degradation. These challenges are interconnected and are collectively referred to as the Water-Energy-Food-Ecosystems (WEFE) nexus. Climate change further exacerbates these challenges, making it necessary to take a comprehensive and integrated approach.

The report offers a comprehensive assessment of the available scientific knowledge on these issues, covering the drivers of change, cascading impacts, and response options for addressing the multiple challenges in the region. It emphasises the need for cross-sectoral coordination, technological and social innovation, ecosystem-based solutions, including nature-based, and transformative governance to mitigate risks and maximise synergies across the WEFE components.



Interlinking climate change with the Water - Energy - Food - Ecosystems (WEFE) nexus in the Mediterranean Basin

by MedECC  
Mediterranean Expertise Centre for Climate Change and Resilient Development

The findings in this Special Report are the result of collaborative efforts by scientists, policymakers, and stakeholders across the Mediterranean. This report provides decision-makers with data-driven insights, along with evaluations relevant for policy-making needed for mitigating climate impacts and ensuring

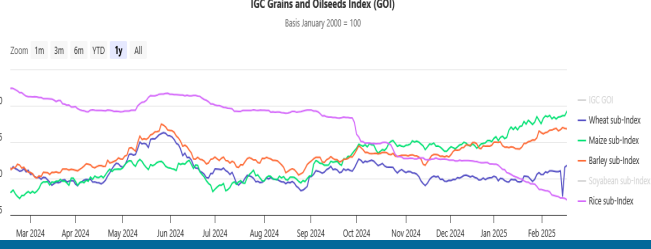
the sustainable management of natural resources.

↪ [Full report](#)

## Trends on Global Markets

	Global Price Index <sup>1</sup> (18 Feb. 2025)		Supply & Demand in Feb. 2025 <sup>1</sup>	
			From previous forecast (M/M)	From previous season (Y/Y)
Blé/Wheat	223	↗	▼	▼
Maïs/Maize	246	↗	▼	▲
Riz/Rice	185	↘	↔	▲
Orge/Barley	234	↗	n/a	n/a

<sup>1</sup>: In USD - base 100=year 2000 - ↗↘↔ vs last month  
(▲ : Easing ; ▼ : Tightening ; ↔ : Neutral, n/a : not applicable)  
Sources : AMIS Outlook - <http://www.amis-outlook.org> and International Grains Council



		(M/M)	(Y/Y)
FAO Food Price Index	124.9	↘	↗
FAO Cereal Price Index	111.7	↔	↘

Source : FAO World Food Situation - [FAO Food Price Index](#) (07 Feb. 2025)

## Events

10-11

04

2025

24

04

2025

### EuroGrainHub Exchange (Bucharest, Romania)

European grain exchange and agri forum for the grain industry and agri trade business in Central and Eastern Europe.

↪ [Visit the webpage](#)

### 23<sup>rd</sup> Black Sea Grain (Kyiv, Ukraine)

The conference will bring together producers and processors of grains and oilseeds, agri holdings, traders and exporters, agri-food, finance and logistics sector, industry associations and government agencies to establish effective interaction between all players in the supply chain.

↪ [Visit the webpage](#)



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