

The Russian-Ukrainian war and its impact on food in North African countries

Poor nutrition and sovereign resistance



Editing and Coordination Imen Louati and Ali Aznague

Cover Photo: Nadir Bouhmouch

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2 Index

4 Introduction

6 Interview: The Russian invasion of Ukraine and its impact on agricultural workers in Morocco

10 The impact of the Russian-Ukrainian war on Algeria:
Towards a more sustainable and resilient food system

20 Moroccan Fertilizer Market in the Context of Russia-Ukraine War and Food Sovereignty Project

30 The war within the war or how the IMF is controlling what is left of Tunisia's food structure?

38 What does the future hold for the Egyptians' food system?

Editing and Coordination Imen Louati and Ali Aznague
Cover Photo: Nadir Bouhmouch

Authors:

Atiqa Fizazi

Omar Besseoud

Mohamed Boulalam

Walid Besbes

Nada Arafat

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The Russian-Ukrainian war and its impact on food in North African countries

Poor nutrition and sovereign resistance

The current wars and the Covid-19 pandemic have exacerbated the crisis that has been affecting the world economy since 2008. After two years of recession (2020/2021) following the complete lock down as a result of the Corona virus, and the subsequent collapse of industrial and service facilities, lay off of workers, disruption of production chains, and immediately after the world economy started to bet on system recovery from the pandemic, tensions between the major capitalist countries have been intensified, especially with the trade wars between the United States of America and China, followed by Russia's war against Ukraine.

Although North African countries are located far from the geographic areas of these crises, they remain subject to their consequences. Our countries' dependence on major capitalist centers makes them the most affected, as their dependence is multi-faceted, particularly in terms of food dependence - which is of interest to us in this Special Issue.

Russia and Ukraine are two of the main exporters of wheat in the world, and several countries depend on it to feed their population, especially North African countries, and Tunisia and Egypt in particular.

Indeed, if the countries of the region manage to cover their food needs in the short term, mainly by mobilizing their budgetary resources, they are now facing great difficulties for their external supplies. Even though this war is new, food and agricultural product prices have skyrocketed, by more than 50% for some products. The consequences of this war have also affected the prices of agricultural inputs, which have increased by 100% for fertilizers in some of the region's countries.

The recent war has also demonstrated the fragility of our food systems and the failure of the neoliberal policies that have been applied in our region for decades. North African countries have, to varying degrees, adopted "modernization" policies built on the marginalization of local knowledge through mechanization and shift from subsistence to commercial and export agriculture, which in turn have led to the intensification of export oriented crops, particularly in Tunisia, Morocco and Egypt, in line with late colonial approaches.

This paradigm was enhanced after the transition of North African countries to neoliberalism in the early 1980s, under pressure from international financial institutions. Since then, there has been a focus on reducing public debt and social spending and allowing greater market dominance through continuous privatization of public enterprises and gradual undermining of public services. As a result, the government's gradual withdrawal from traditional agricultural sectors has led to access to food through market mechanisms, whether on world commodity markets, local production or even food aid, to the detriment of food sovereignty in North African countries.

These policies, by empowering multinational corporations and entering into free trade agreements between North African countries and large capitalist countries, have resulted in the neglect of local agricultural and environmental systems.

Russia's war on Ukraine concretely reveals what it means for countries to lose their food sovereignty, become dependent on the supply of their food needs, and embrace capitalist trade and export agriculture for the increasingly volatile foreign market. The Russian invasion of Ukraine has also highlighted the dependence of our countries and the fact that we could starve if the war expands or turns into a nuclear war as a consequence of the invaders' insanity.

It has become clear that subjecting our peoples' nutrition to foreign markets constitutes a form of neo-colonialism with novel mechanisms: debts, agreements, investments by multinationals, acquisition of land and its wealth, elimination of family/subsistence farming, commodification of local seeds, among other aspects of capitalistic warfare against small food producers.

Although we have not yet reached the level of famine in our region, it is clear that the high prices of foodstuffs and food production inputs and the decline in purchasing power can lead to malnutrition along with its health and social consequences for some of the region's populations.

It is therefore necessary for the people affected to get organized to create a sovereign social resistance fighting for the realization of a food sovereignty project based on agro-ecological practices, which would ultimately protect them from the frequent food crises resulting from dependency on imports and vulnerability to climate change and price fluctuations.

This Special issue sheds light on the impact of the Russian invasion of Ukraine on food supply in North African countries. Given the different effects of war on North African countries, this Special issue will address the impact of war on four countries in the region: Algeria, Tunisia, Egypt and Morocco.

This is an attempt in coordination with a group of researchers and agricultural workers to bring a comprehensive overview of the food situation in our countries in light of the aforementioned war, while also attempting to formulate alternative projects that could serve as an entry point for a unified popular debate on which to build our liberalization project, i.e. peoples' sovereignty over food production and consumption in North Africa.

Imen Louati / Tunisia

Email: Imen.Louati@rosalux.org

Ali Aznague / Morocco

Email: Azenague82@gmail.com

Interview: The Russian invasion of Ukraine and its impact on agricultural workers in Morocco

The following interview is a conversation with Atiqa Fizazi, a fired trade union worker, displays a preliminary picture of the conditions experienced by workers in the agricultural field in Chtouka Ait Baha Province located in Souss region of Morocco, amidst the repercussions of the Russian invasion of Ukraine. It shows how investors in Morocco have exploited this global tension to increase their profits at the expense of agricultural workers. The worsening of the living conditions of all agricultural workers is not born of wartime, but is deeply rooted in the capitalist system based on the toil of millions of women, men and even children. A reality that will only be changed by building a social balance of power that opposes imperialist wars and seeks a society based on equality and democracy.



Source: Chtouka Ait Baha branch of the federation of democratic unions facebook page

Below is the conversation content:

1- Are agricultural workers aware of the gravity of what is happening in Ukraine? Are there discussions among workers and within the union about this war and its effects?

Workers in agricultural farms were very afraid of the Russian-Ukrainian war. At the beginning of the war, the agricultural workers saw that things could get worse for them due to the impact of the war on the productive situation, and this fear was enhanced by employers who started to spread rumors such as:

- There is no demand for products which are not even accepted in the foreign market.
- We are currently bearing the losses and paying the gap out of our own pocket so that we don't lay off.
- It is necessary to work more to increase productivity.
- We are not making profits

- We don't make profits.

This situation has been so well exploited by employers and pressure has been put on workers that they have become fearful of the future.

Employers are transferring the costs of their crisis to the workers, since the work pace has been increased and the wages of informal workers have been reduced to 70 dirhams (about \$7), which is less than the minimum wage in the agricultural sector. All of this is for the same reasons: the crisis and its impact, which employers have exploited to attack the working class, especially those who are not union members.

The local office (Democratic Agricultural Union - regional section of Chtouka Ait Baha) organized a discussion on the war and agreed to distribute a leaflet, but circumstances prevented this action. We also agreed to discuss the impact of the war among workers and agricultural workers in order to be aware of the real risks it can inflict on us, and to know its limits in order to understand this war and how employers are exploiting it to their advantage. This discussion has indeed taken place but within a limited minority, due to the difficulty of communicating with the workers given their large numbers, and we tried through the debate to reach out to those who are union affiliates.

How has the war and the rise in prices impact female agricultural workers?

Female workers have been greatly and directly hit by this war, because the workforce is predominantly female, representing almost 70%; what has had a greater impact is the low wages that have not been increased, on the other hand, prices have dramatically increased, with women bearing a large part of the family responsibility, though not denying the role of men, because female agricultural workers are the ones responsible for making purchases and are at the same time housewives and agricultural workers.

In fact, today female workers' wages have been adversely impacted, despite the husbands contribution, seeing that daily expenses are rather the woman's responsibility, which puts more pressure on the latter, which in turn has psychological and material impacts. In fact, women feel pressure, which has become quite noticeable through what they are expressing: "We don't have the time nor the money to get ourselves clothes". This is because prices have increased and women are the ones who have to do their own shopping and keep busy with these life hassles, under the strain of a dire economic situation, whose cost is significantly borne by female agricultural workers.

3- Is the war affecting agricultural production inputs, including fertilizers and pesticides? Have the prices of these commodities increased?

As for pesticides and fertilizers, I have no idea, but one of the technical colleagues told me that the price of fertilizers during the war increased by 100%, and that the prices of chemicals used in agriculture have also plummeted, that is what I tried to find out.

4- The war has brought about the phenomenon of inflation and high food prices. What are the consequences of this phenomenon on the workers' purchasing power?

Indeed, workers have been impacted by rising prices, especially given that the increased prices have affected some of the basic food items that workers depend on in their daily lives with an increase of 50% in some cases. Some of them have given up buying some of these items because they could not longer afford them. Prices are very excessive and wages are not increasing, especially that the State is not implementing the wage escalation, and that the minimum wage in the agricultural sector is not being applied, which means that most of the female workers are receiving wages much lower than the legally recognized ones. It should also be remembered that agricultural workers who work without formal papers are exploited in the most despicable ways, and do not even receive the minimum wage as they are more vulnerable to exploitation. All these factors are adding to an already low purchasing power. These have been expressed by employees during workplace discussions among male and female workers.

5- Do workers link the deterioration of their purchasing power with this war, or with other factors? What are these factors?

There are certainly other factors behind the deterioration of workers' purchasing power, mainly the distinction made by the state between industrial and agricultural wages. Knowing that agricultural workers have longer hours and lower wages, with deplorable conditions due to pesticides that have serious effects on their health, resulting in fatigue and extra effort and the appearance of many diseases that require additional expenses that absorb part of their already meager wages. Overall, work in agriculture is not enough for them to live in dignity with their current wages.

These segments are being marginalized by the State, which is indifferent to their conditions and supportive of employers who are reducing wages and intensifying working hours, as perpetuated by the pretext of the impact of war in Ukraine.

Actually, the purchasing power of female and male agricultural workers as citizens is already low and has been exacerbated using the pretext of the war in Ukraine.

The meager wage increase agreed upon (5%) as part of the government-union agreement in April 2022 will not change anything, in the face of the astronomical rise in all food prices.

These soaring prices and low wages may cause people to stop providing basic necessities.

Any final comments?

To conclude, I may say that with the Corona pandemic, the economic and social cost has been borne by the working class and working women are the ones that have been most impacted, with employers and the State taking advantage of any crisis to perpetuate their monopoly over the working class. For example, in light of the Corona pandemic, agricultural production increased in the first year, according to government officials, but so did the hours of work with no increase in wages.

Cooperation between authorities and employers through regulations is exploited in any crisis for the benefit of employers and the State by accumulating profits at the expense of agricultural workers' workloads. This has become evident both in light of the corona virus

and the current war.

They take advantage of crises to promote austerity policies at the expense of workers' pockets, and are more interested in increasing profits, without pointing the finger at big corporations and the capitalist system. They target the vulnerable worker by increasing profitability and working hours, while keeping wages unchanged. In short, the working class bears the cost of any global calamity.

The impact of the Russian-Ukrainian war on Algeria: Towards a more sustainable and resilient food system

Introduction

The global COVID – 19 pandemic in 2020 has spurred the crisis in commodity markets that began in 2019. The disruption of the distribution and transportation chain, in conjunction with subsequent protectionist trade measures by producing countries, led to a rise in agricultural commodity prices. This price inflation, further intensified by the Russian-Ukrainian war, has severely affected the food security of the poorest countries, particularly in sub-Saharan Africa, Ethiopia, Eritrea and Somalia.

What impacts did this war have on the Algerian food system, its sustainability and/or resilience?

Before answering this question, we will briefly outline the specificities of Algerian agriculture and the state of its food security.

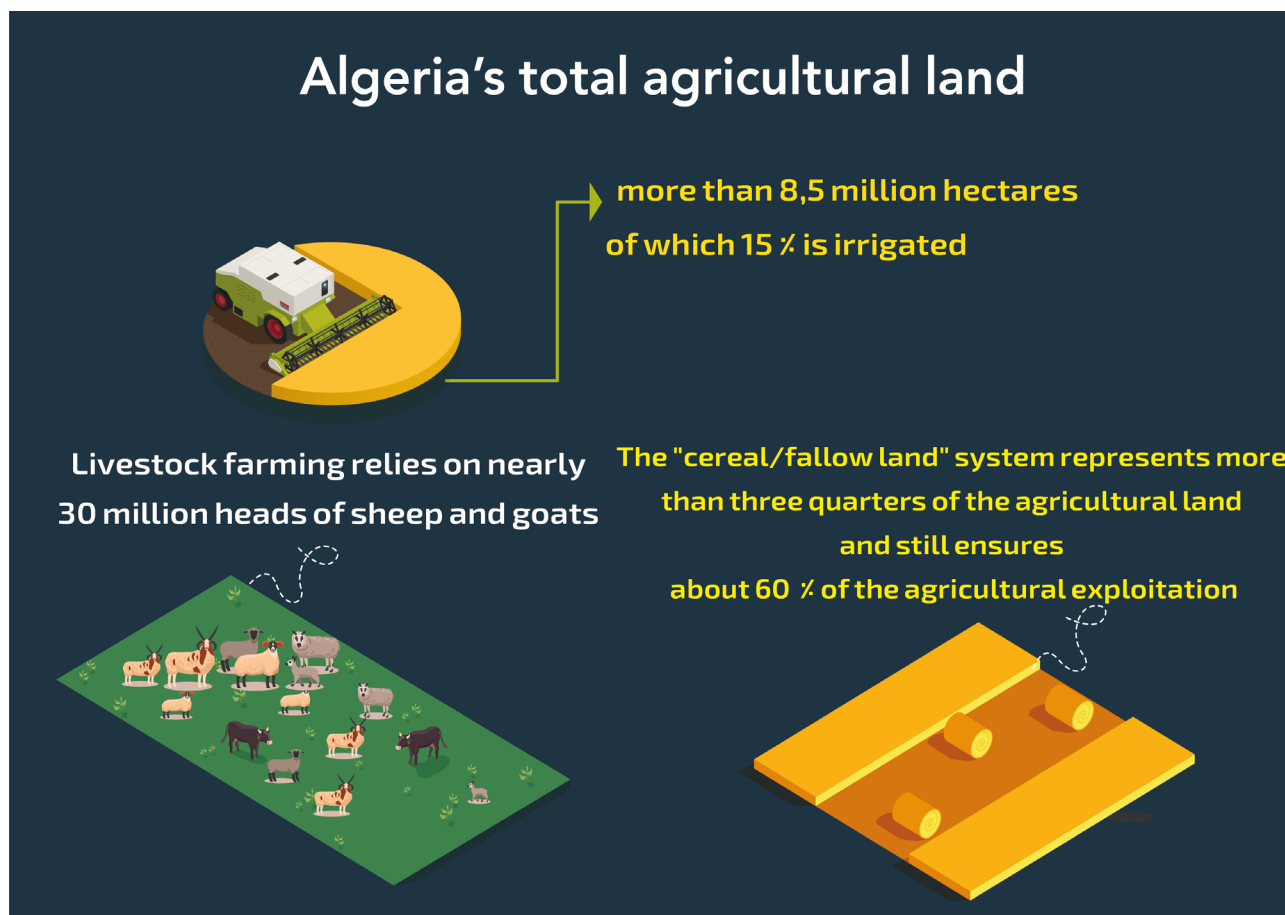
The specificities of Algerian agriculture

Agriculture holds an important position in the Algerian national economy, as well as in the development of its rural areas, accounting for a slightly more than 12% of the GDP excluding hydrocarbons, providing more than 20% of the active population, and generating 70% of the value of the national food consumption. The agricultural sector is still central to the development of rural areas. An estimated 11.5 million people continue to live in Algerian rural areas following the massive migration caused by extreme insecurity in the 1990s. This population, most of whom are under the age of 30, is constituted by agricultural households, which account for about 40% of this rural population.

Algeria's total agricultural land is estimated at more than 8.5 million hectares, of which 15% is irrigated. The "cereal/rest land" system represents more than three quarters of the agricultural land and still ensures about 60% of the agricultural exploitation. The major innovation in recent years has been the development of large-scale desert agriculture, which has been supervised for the past two years by the Office for the Development of Industrial Agriculture in the Sahara (Office de Développement de l'Agriculture industrielle en terres Sahariennes ODAS). Livestock farming relies on nearly 30 million heads of sheep and goats, as well as a herd of cows producing meat and milk for the local market.

In dry areas, the scarcity of resources, structural constraints (predominance of less than 19 hectares farms) and the fragility of ecosystems (steppes, oases, mountains) are incompatible with the technical generalization of the industrial (or productive) system, which is considered

to be one of the main orientations of the official agricultural policy.



Due to failure to meet the growing food demand with the national supply of basic products i.e. wheat, milk, sugar and edible oils, accounting for most of the food consumption of Algerians, it has become crucial to have recourse to imports to cover the country's food needs. Algeria's food bill has been steadily increasing over the past decades, and it is now the largest importer of food in Africa, with about 75% of basic food needs covered by imports. Algeria's failure to produce the two main foodstuffs, cereals and milk, is attributable to its agro-climatic conditions (most of Algeria's agricultural land is located in arid and semi-arid regions), the scarcity of arable land, its low natural fertility and the lack of water resources. It also stems from inappropriate political and technical choices.

The approaches adopted have neglected the upper arid plains based on rain-fed agriculture, where field crops (including cereals) are widespread. Large-scale irrigated agriculture has been encouraged in the desert areas. However, this last choice is based on the overexploitation of non-renewable groundwater resources on the one hand, and on public and private capital whose profitability has not been achieved, given the high production costs in these areas and the market prices that do not correspond to the incomes of lower classes.

What is the state of food security in Algeria today?

From the outset, we must state that the Algerian population has not experienced any conditions of food insecurity. The national agricultural supply has been systematically and

effectively supported by imports to cater for the population' needs. Food subsidies for basic products (bread, pasta, couscous, sugar, and oils) have been crucial in covering food needs, and the disturbances in supply cycles experienced since the beginning of the health crisis (shortages of semolina, sugar, and edible oils in the spring of 2020) have not altered the state's ability to guarantee people' access to strategic products. A look at the data published by international organizations on the prevalence of under nutrition (the Food and Agriculture Organization of the United Nations, the World Food Program, the United Nations Children's Fund, the International Fund for Agricultural Development, and the World Health Organization) clearly indicates the progress achieved by Algeria in terms of food security.

This result indicates that Algeria is now in a comfortable food security situation. The high performance in 2018-2020 is above the global level, or that of countries such as Egypt and Morocco. It is similar to that achieved in high-income Western countries. The caloric share recorded in the period 2017-2019 was 3343 calories per day per person (United Nations Food and Agriculture Organization, 2020), that is to say, with less than 2.5% undernourished, compared to 8.5% globally, 3% in Tunisia, 4.2% in Morocco and 5.4% in Egypt.

These achievements are attributed to the State' policy of price subsidies for basic foodstuffs, while improving incomes, living conditions and the well-being of the population over the last 20 years. They are also the result of efforts to reduce poverty and social and territorial inequalities, which, needless to say, are the root causes of food insecurity and malnutrition in all its forms.¹

Even though the improvement in Algerians' food share has been achieved in part thanks to sustained food purchasing power and to a moderate yet effective growth in agricultural supply, including basic products such as wheat or milk, it remains more reliant on imports: between 1970 and 2010-2017, the share of imports in the composition of the Algerian citizen's food share rose on average from 38% to 68%² (CREAD, 2017). It has to be noted that wheat (soft and hard) contributes 43% of total calories and 46% of proteins in the average food ration of the Algerian consumer.³

1 The most recent economic monitoring report on Algeria published by the World Bank (2021) confirmed the progress made in reducing inequality. This reduction is mainly the result of public subsidy policies, support measures for health and education, and housing made available by the State. The World Bank devoted the third chapter of its report to " Trends in poverty and non-monetary inequality in Algeria ". The multidimensional poverty index is a non-critical approach that measures the level of deprivation by focusing on three major dimensions: health, education and living conditions. Data on these dimensions are aggregated into a single index ranging from 0 to 100, where 100 represents total deprivation. A person is considered "multidimensionally poor" if his or her deprivation level exceeds 33. Algeria's multidimensional poverty index fell from 2.1 percent in 2013 to 1.4 percent between 2013 and 2019. This multidimensional poverty rate is better than that of its regional neighbors. Egypt (5.2%) and Morocco (6.1%). It should be noted, however, that signs of poverty persist in some areas, particularly in the north-central and northeastern parts of the country, which have lower levels of deprivation than other parts of the country.

2 The increase in production achieved through agricultural programs (National Agricultural Development Program, Agricultural Sector Support Program, Agricultural Plan 2019) has been overshadowed by the high demand for food due to population growth and the purchasing power of the population.

See the study: Etude CREAD-PAM (2017). Analyse de l'état de sécurité alimentaire et nutritionnel en Algérie. Décembre 2017. 80 p

3 It is the traditional basic food in Algeria, and each citizen currently consumes about 200 kg per year, about 60 kg more than the global average (OECD-FAO, 2018). According to the UN Food and Agriculture Organization, Algerians buy and consume an average of 49 million rectangular loaves of bread per day, with an average consumption of 110 kg per citizen.

The country's prevailing approach to food security, largely dependent on subsidies for the benefit of domestic consumers, is equally reflective of the availability of food products acquired on the world market.

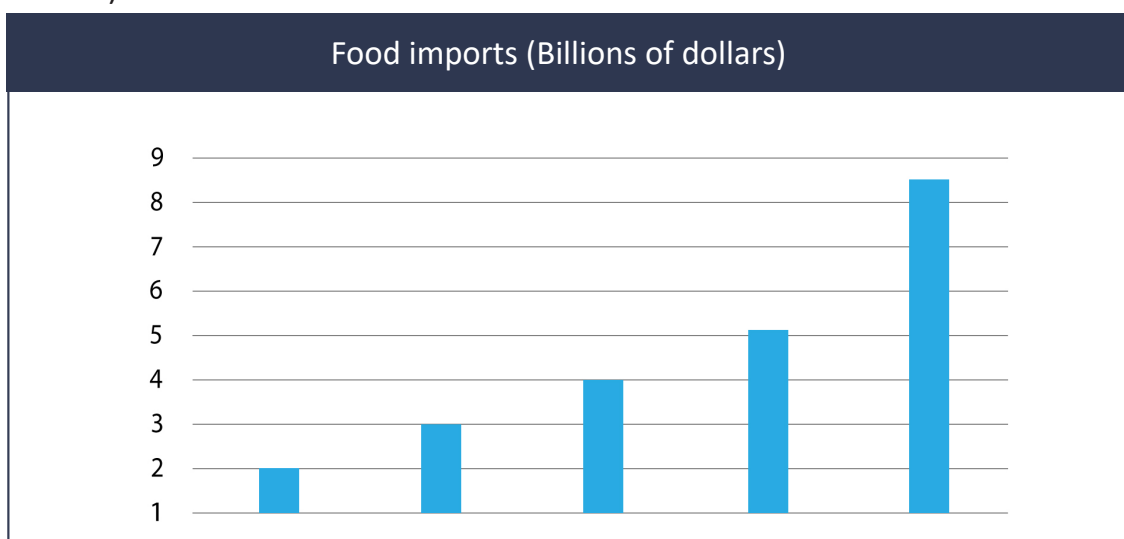
Rising food imports, with agricultural trade balance recording a deficit

The failure to meet the growing demand for food by the national supply has made it necessary to import to cover the country's food needs, making the food bill grow steadily over the past decades.

The main imports are basic products (the two types of wheat, dairy products, sugar, edible oils), which account for the main composition of Algerians' food diet, and represent on average more than 60% of the food bill. The consumption demand for wheat has increased tenfold between 1966-69 (698,500 tons) and 2000-2005 (6,796,000 tons) to level off at nearly 8 million tons during the 2010 decade. National demand for both types of wheat consumption covers just over 25% of national production, which makes Algeria's cereal dependence the highest in the North African region, at 72% on average, and also one of the highest in the Mediterranean basin. The average annual quantities of cereals imported during the last six trade years⁴ amounted to over 123 million quintals. The deficit mainly relates to soft wheat and maize. The quantities imported between 2014 and 2020 account for more than 86% of imported cereals, including 51% of soft wheat.

Dairy products also display the same trend, with Algeria importing 60% of the country's milk powder each year.

The value of food imports has increased from an average of 1 billion dollars in 1970 to 2 billion dollars in 1980, to 3 billion dollars in 2003, to an annual average of 4.3 billion dollars in 2006-2010, and doubled in 2011-2015 under the joint effect of rising world prices and imported quantities. In recent years, it has stabilized at an annual rate of about 8.5 billion, with the recent decline in the food bill resulting from lower international prices as well as lower imported quantities (Except for cereals in 2020, whose production reached a record level in 2019).



⁴ The commercial cereal season begins in June of the year and ends in July of the following year.

These imports have created a structural deficit in the agricultural trade balance, with agricultural exports covering barely 5% of the total food imports in 2020. The food import bill has increased in 2021 and 2022 due to a sharp rise in agricultural raw material prices. Obviously, this situation is part of Algeria's food fragility, which is closely linked to its ability to deal with emerging global food market threats.

An increase in food commodity prices in 2020 that deepened in 2022

This increase in food commodity prices emerged firstly after the COVID-19 health crisis in conjunction with strong interventions by several countries (including China) on these world markets, and secondly after the interruption of cereal supplies from the Black Sea as a consequence of the Russian-Ukrainian war (24 February 2022).

The increase has been recorded on all products imported by Algeria, namely the two types of wheat, barley, corn, dairy products, sugar and edible oils. The economic situation that has been affected by the health crisis will significantly impact food product prices in 2020 and 2021.

Such price escalations, driven by global energy prices, are at the root of the high food bill and agricultural price inflation.

During the 2020-21 trade season, the prevailing market dynamics, with lower than usual harvests in some major producing countries, logistics (transportation) challenges, temporarily reduced exports, and a significant increase in demand for coarse grains by China, have pushed cereal prices to their highest level since 2012-13. World agricultural commodity prices between May 2020 and May 2021 registered the largest increase. In May 2021, prices soared by about 40 percent in a year, reaching their highest levels in September-October 2021, according to the U.N. Food and Agriculture Organization. Corn saw an increase of 88 percent, soybeans 73 percent, wheat and milk 28 percent, and sugar 34 percent.

Prices for soft wheat were around \$290 per ton FOB⁵ in the last quarter of 2021, and durum wheat was around \$430 per ton FOB at the end of 2021. Corn was selling at about \$240 per ton, and skim milk powder at over \$3,500 per ton FOB. This significant price volatility in world wheat markets has led to higher wheat prices imposed on the Algerian Interprofessional Office for Cereals (Office algérien interprofessionnel des céréales – OAIC).

This Office, which since August 2021 has enjoyed a monopoly on the import of cereals⁶, paid a high price for supplies in September 2021, at a cost of 349.50 dollars per ton CIF.⁷

An upward trend in agricultural commodity prices will be further intensified following the Russian-Ukrainian war that broke out on February 24, 2022. Since the outbreak of the war,

⁵ FOB Free On Board., No Transportation Expenses

⁶ In August 2021, the government entrusted the import of wheat exclusively to Algerian Interprofessional Office for Cereals in order to avoid imbalances felt on the wheat market, some of which had resulted from the practices of sector manufacturers who sought to mix the quantities imported with those allocated by the Algerian Interprofessional Office for Cereals, thus avoiding the control of the destination of the wheat subsidized by the State. The institutions that used to import to meet their own needs will now be supplied by the Office.

⁷ CIF i.e. calculating transportation costs and insurances.

soft wheat prices have increased by 50% to \$450 per ton (FOB). World prices for vegetable oils have risen by 23%, sugar by 7% and meat by 5%. This increase was mainly caused by speculative behavior in the markets given that the commercialized wheat was harvested during the previous agricultural season.

Accordingly, Algeria bought 600,000 tons of French soft wheat at 485 dollars per ton (CIF) in March-April 2022 (more than 100 dollars/February 2022). Two consignments of durum wheat were purchased in Mexico with a volume of 500,000 tons at a price of 570 dollars per ton (CIF) and the other one at 590 dollars per ton! That is an unprecedented record. These major procurements were aimed at consolidating the country's security stocks. It is worth mentioning that prices have declined slightly as a result of the July agreement between Ukraine and Russia, which ensured safe sea crossing for the export of cereals across the Black Sea for 120 days. Despite the fact that the price of soft wheat is at 331 USD per ton (FOB), wheat prices remain high, as they are still strongly marked by the unfolding conflict in Ukraine. Market instability is reflected in price increases in late September and early October to around \$350 per ton (FOB).

The geographical distribution of Algerian imports: the EU for soft wheat, the American continent for durum wheat and barley - or how Algeria is evading the geopolitical stakes

Soft wheat import trends over the past five trade seasons indicate that the largest market shares are accounted for by European Union countries (France, Germany, Lithuania and Poland). Though some trade seasons reveal the overwhelming share of France (88% of supplies in 2019-2020), the recent 2020-2021 and 2021-2022 seasons rather indicate a greater diversity in sources of supply as well.

In the last 2020-2021 trade year, France was Algeria's top supplier of soft wheat, although closely followed by Germany and Poland. In June 2021, Russia sent wheat to Algeria for the first time since 2016. This market penetration of Algeria by Russia has been at the expense of the quantities sent by France.

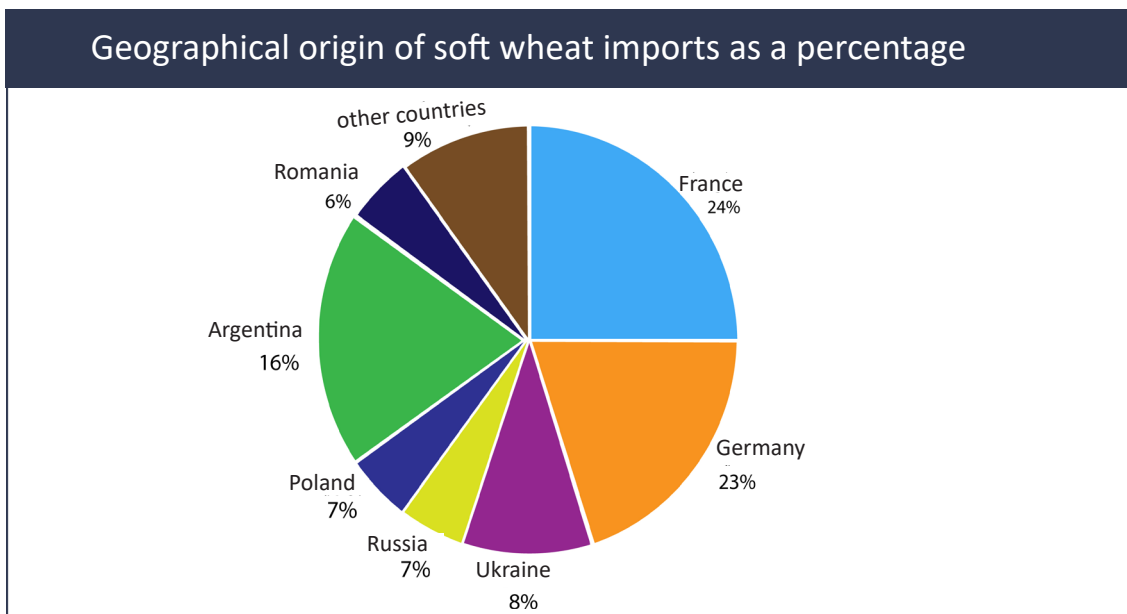
These supplies of wheat have reduced the acceptance recorded by the Algerian Interprofessional Office for Cereals with respect to the percentage of rotten cereals, with wheat bug infection rate tolerated up to 1% but in exchange for a higher percentage of protein.⁸

The United States of America and Latin American countries are the primary suppliers of durum wheat. The quantities of barley imported in the 2020-2021 season are evenly distributed among 7 suppliers, of which 3 are the main ones, namely Denmark as the first supplier, closely followed by the United Kingdom and Spain.

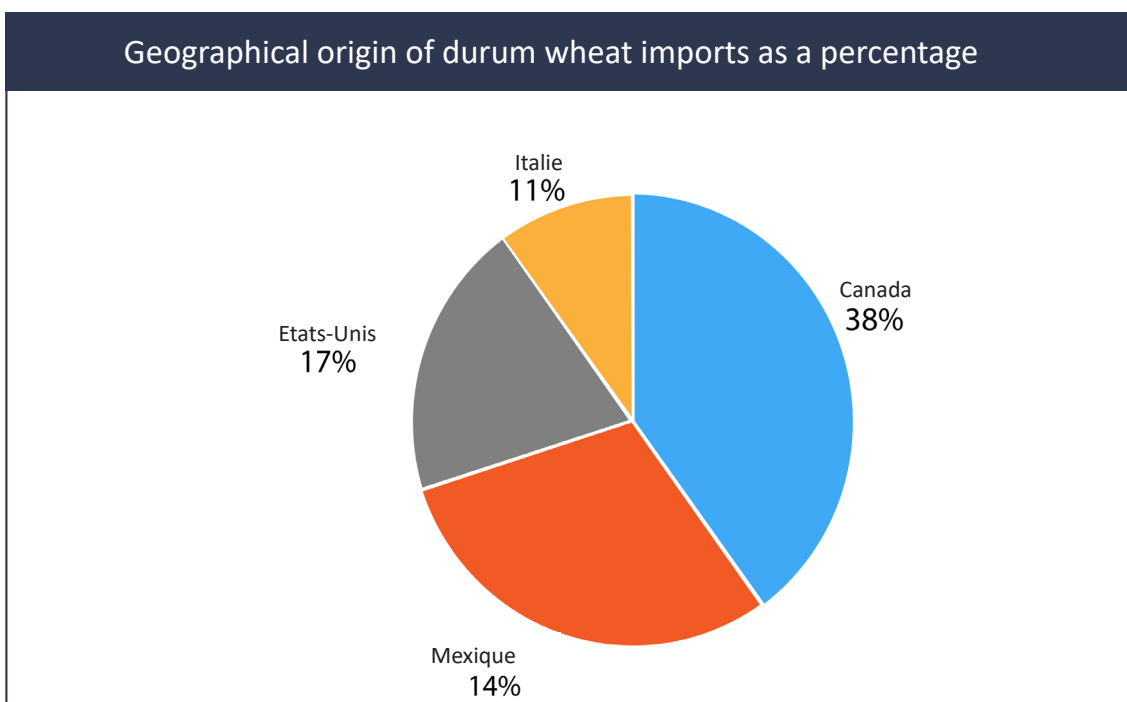
Over the last trade season 2021-2022, a total of 10.6 million tons of cereals have been unloaded in Algerian ports. Of this total, the soft wheat was imported from France (24%), Germany (23%), Ukraine (8%), Russia (7%), Poland (7%), Romania (6%) and other countries

⁸ The needs of the Algerian Interprofessional Office for Cereals have also been revised downwards due to high prices on the world markets.

(9%). Besides, durum wheat was mainly imported from Canada (38%), Mexico (34%) and the United States (17%). The only EU country is Italy (11%).



Barley is imported from Germany (about 50% of imports, with 282,000 tonnes), followed by France (11%), slightly exceeding Lithuania and Latvia. Finally, corn is imported massively from two Latin American countries: Argentina (72%) and Brazil (24%).



Hence, Algeria is only slightly dependent on cereals from the Black Sea (Russia and Ukraine). It is dependent solely on soft wheat, which collectively represents only 15% of the quantities imported. This fact, however, does not mean that Algeria is spared from the geopolitical issues arising in the world markets for basic food products. The excessive prices of these products are reflected in the total food bill and, to date, there is no indication that the country

can acquire these products at no political cost if the Ukrainian conflict continues.⁹

Measures undertaken by public authorities to secure food for citizens and increase domestic production

The advent of the COVID-19 pandemic in Algeria, as well as its resulting disruption of the distribution and supply logistics chain, signaled the measures to be taken by the public authorities to address the issue of citizens' food supply. In response to the sudden impact of the pandemic, the government has doubled its procurement in the food markets in order to build up food stocks (cereals, milk powder and edible oils) and to grant financial and food aid to families.¹⁰

The ongoing market crisis caused by the conflict in Ukraine will lead the Algerian government to restructure food stocks through massive purchases of grain, milk powder and other agricultural raw materials. Public authorities feel safe about the state of stocks (8 to 9 months worth of consumption of both types of wheat) and food subsidy guarantees are still in place. The removal of food subsidies, which was under discussion a few months ago, has now been removed from the authorities' political agenda. The state has not only postponed the reform of the food subsidy system, but has also recently raised subsidies on pasta prices, whose price has remained unchanged. It has also sought to keep the price of bread stable (unchanged since 1989) by granting tax deductions to the bakery sector on its sales, and has reduced duties on bakeries' equipment to silence their claims about bread prices.

The State is also trying to leverage production. In this respect, it has increased the prices paid to cereal producers,¹¹ and has continued to subsidize the price of fertilizer (50% of the subsidized price since October 2022). The State has again authorized the import of high-yield dairy cows since December 2021 in order to increase the production of soft milk, and has liberalized the speed of agricultural equipment imports for the benefit of agricultural investors. Moreover, it is worth noting that the government is encouraging agricultural investments in desert areas for the development of strategic crops (cereals, animal feed, rapeseed, sugar beet and corn). The Office for the Development of Industrial Agriculture has also developed investment zones in some southern areas and granted land concessions to investors.¹²

Indeed, Agricultural policy measures stress agricultural growth achieved primarily through intensive (even mining) utilization of natural resources (water and land). Heavy public investment is spent on the application of a technical model that consumes a lot of chemical inputs and machinery, most of which is imported. This leaves the fate of agriculture and

9 Algeria, which did not condemn the Russian attack on Ukraine, was considered by Western countries among the "unfriendly" countries

10 In the spring of 2020, the Ministry of the Interior drew up a list of 2.2 million families who received a grant of 10,000 dinars. Thus, the government has allocated a budget of 22 billion dinars, in addition to food aid, for the benefit of 400,000 families..

11 The price of wheat production went from 4 500 dinars per quintal (d/q) to 6 000 d/q, the price of soft wheat from 3 500 d/q to 5 000 d/r and the price of barley from 2 500 d/q to 3 500 d/q.

12 A first batch of 97,000 hectares was allocated last year, and a second batch of about 150,000 hectares was made available to investors in October 2022.

the country's food security in the hands of a segment of agricultural entrepreneurs who are seldom worried about the ongoing climate change. This entrepreneurial class originating from business circles, which also comprises local political system clients or large landowners, competes with peasant families for real estate resources, public subsidies and technical support from the state. In fact, the current agricultural trends are ignoring the real food sovereignty of the country

Towards food sovereignty in Algeria: Which lessons to draw from these economic and political crises?

The future of global agricultural commodity markets is highly uncertain, as containment of the volatile character since 2012 has been particularly driven by world records in cereal production, but maintaining this condition is uncertain amidst an era of conflicts involving major commodity producing zones. "What is sure is that food prices will get more volatile than in the past," as noted by analysts at a European think tank specializing in global agricultural markets.¹³ The UN Food and Agriculture Organization and the Organization for Economic Cooperation and Development estimates highlight that the volatile nature of global agricultural prices will tend to increase or remain high in the future.¹⁴ Within the current geopolitical context marked by uncertainty, the sustainability of supplies from world markets notably affected by periods of political instability and geopolitical conflicts may be questioned. While Algeria has been able to manage its provisioning over the last two years thanks to gas and oil revenues (whose prices are now rising), nothing indicates that this comfortable financial situation can be sustained in the medium and long term.

The economic and political shocks (to which we must add climate change) require strengthening the productive base of the agricultural sector, reducing the deficit in strategic products (cereals, milk and edible oils), and achieving greater independence of the food industry from external markets. Such recurrent crises call for choices aimed at ensuring adequate and sustainable production at the national level and guaranteeing safe food for consumers.

The availability of food supplies - especially durum wheat, milk and potatoes - constitutes the main challenge facing food sovereignty.

This imperative calls for the necessity of moving away from the liberal logic of granting public loans, technical assistance, land and water to a minority of beneficiaries (from agricultural or non-agricultural backgrounds), and of placing the future of the agricultural and food sector solely in the hands of "agricultural investors", as mentioned above.

In light of these challenges (economic, social, environmental, climatic, etc.), it is necessary to identify ways and means for greater support to family farms, whose activities are now geared towards the production of basic foodstuffs and which are truly working for the food security

¹³ Analysts at Tallage/Stratégie Grains - an agro-economic research firm specializing in the European and international grain and oilseed markets.

¹⁴ OCDE-FAO (2018). *Perspectives agricoles de l'OCDE et de la FAO 2021-2030. Principaux éléments de projection.*

of households, as well as for the land they use. Ensuring seed production capacity - which is the first link in the food chain - diversifying farming systems and protecting biodiversity, local assets and know-how are key objectives for progress towards food sovereignty.

As such, there needs to be a genuine paradigm shift in the current economic and technical paradigm. The technologies developed by the agricultural capitalistic undertakings, involving increased use of fertilizers, pesticides, imported machinery and genetic equipment, and the granting of privileges for access to land and groundwater to a minority of beneficiaries (both agricultural and non-agricultural), have not brought convincing results in terms of agricultural yields. These policy choices have only contributed to reinforcing the country's economic and technical dependence. The industrial techniques applied to agriculture today contribute to soil degradation, overexploitation of water resources and reduction of biodiversity. In view of climate risks, it is essential to develop a new technical agricultural model, free of the technology driven model - inspired by northern countries with different agricultural climatic conditions than ours - especially for a country with a high consumption of chemicals, pesticides and agricultural equipment, most of which are imported. Time has come to reinstate the Arab, Berber and Andalusian agricultural heritage which, in the past, has been able to make the most of often fragile resources by inventing sustainable technical systems.

The way to food sovereignty, which needs to be outlined to secure the future, also requires restructuring the national agri-food system and ensuring a closer connection with the national production system in order to reduce its vulnerability to fluctuations in international markets.

Such solutions towards a sustainable agriculture and consumption are well within Algeria's reach, providing that it relies on the mobilization of farmers, technicians, engineers and all active forces eager to build and contribute to a progressive future for the country.

Omar Besseoud / Algeria

Email: bessaoud@iamm.fr

Researcher in agricultural economics

Note: This text was written in French, translated into Arabic by the sovereignty website (www.siyada.org)

Moroccan Fertilizer Market in the Context of Russia-Ukraine War and Food Sovereignty Project

“Never Let a Good Crisis Go to Waste!” This was the title of a¹ fascinating study made by the Filipino activist and writer Walden Bello, during the Corona pandemic crisis. It is a slogan practically espoused by capitalists and large business owners locally and globally, whenever there is a crisis, a war, a health crisis or an economic crisis.

The “Office Chérifien des Phosphates” [OCP] which monopolizes the production of fertilizers in Morocco is at the head of these companies, as confirmed by its President Mustafa Terrab on 11 October 2022, at the annual meeting between the Group, the International Monetary Fund and the World Bank in Washington, saying: “There is an opportunity in the current crisis to deal with the long-term balance and focus on the African continent because it is suffering from a major shortage”.²

What are the stakes of the largest monopolist of Moroccan phosphate production (OCP) in the African and international market? Does the State’s public finances benefit from that fertilizer revenue boom? What are the benefits for the small Moroccan farmer? Does OCP really contribute to ensuring “food security” and achieving food “sovereignty” as stated in the literature of the OCP Group?

1. Russia-Ukraine War and Global Fertilizer Market stakes

The Russia-Ukraine war (and before the Covid-19 pandemic) has disrupted global supply chains, both in terms of food and inputs, especially fertilizers. In fact, Russia is “the world’s largest fertilizer exporter with 15.1% of total fertilizer exports”.³

The trade war is one of the weapons currently used between the two sides (Russia on the one hand, and Ukraine and the “West” on the other). To counter the economic sanctions against Russia, the latter relies on the dependence of the European Union and other parts of the world (especially Africa) on its production of fertilizers and on its position as the second largest producer of natural gas, a key component of all phosphorus fertilizers as well as nitrogen fertilizers: “The European Union relies... on Russia to get 30% of the fertilizer supply.”⁴

Within this context, Morocco, through the Office Chérifien des Phosphates, is seeking to position itself in the context of these current upheavals, namely because it considers itself the gatekeeper of the global food supply chains, although this elegant sentence merely means continuing the same specialty everything is for exports” that has been allocated to Morocco

1 The website of the North African Network for Food Sovereignty at the following link: <https://bit.ly/3U4Fr4M>

2 12/10/2022, <https://bit.ly/3WV1mhk>

3 “How Morocco could use its Solar Energy and abundant Phosphorous to Feed the World and Offset Russia”, by Michaël Tanchum, Universidad de Navarra, July 10, 2022, <https://theconversation.com/morocco-a-top-fertiliser-producer-could-hold-a-key-to-the-worlds-food-supply-180797>.

4 same reference.

in the division of international work since colonial era: the production of raw materials and at best their processing and transformation.

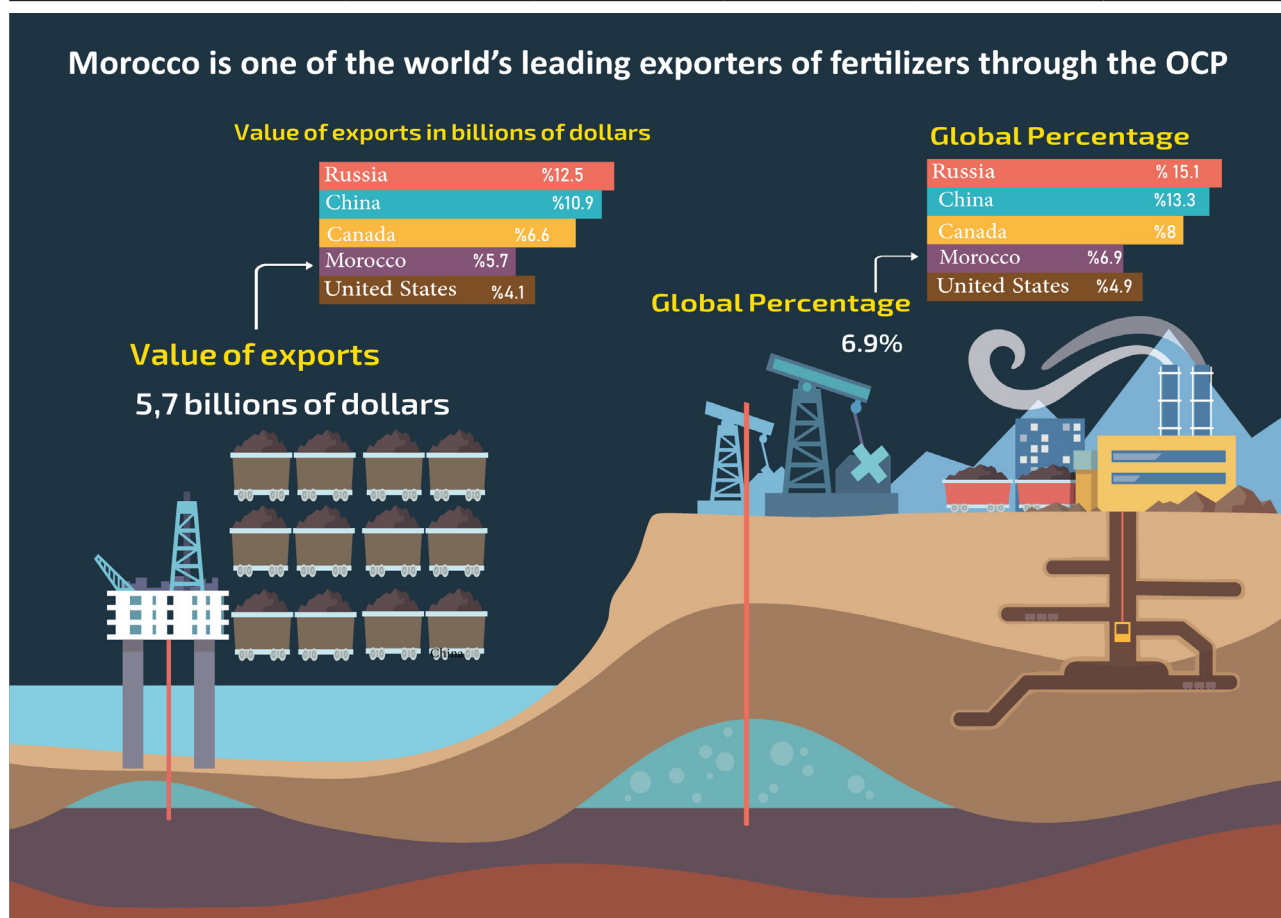
2. Huge international market

The fertilizer market is huge and attracts profit-makers. In 2020, its volume reached “about 190 billion US dollars... and in 2021, the global phosphorus fertilizer market [alone] was about US \$59 billion.”⁵

As long as raising revenues remains the main concern in light of an opportunity/crisis that no one can guarantee its continuity, the statement made by the Office Chérifiens des Phosphates calling for getting closer to the small farmers in the continent [i.e. Africa] is only a softened formulation of invading the African market and searching for farmers who are able to buy fertilizers in a global economic context characterized by high gas prices and other agricultural inputs.

In fact, Morocco is one of the world’s leading exporters of fertilizers through the OCP, and these are some of the figures for 2021:⁶

Country	Russia	China	Canada	Morocco	United States
Value of exports in billions of dollars	12.5	10.9	6.6	5.7	4.1
Global Percentage	15.1	13.3	8%	6.9	4.9



⁵ same reference.

⁶ “Top Fertilizers Exports by Country”, by Daniel Workman, Central Intelligence Agency, The World Factbook Field Listing: Exports-Commodities. Accessed on May 16, 2022, <https://www.worldstopexports.com/top-fertilizers-exports-by-country/>.

3. Office Chérifiens des Phosphates: a major capitalist company

The OCP was founded in 1920 under the name of the “Office Chérifiens des Phosphates”. Because France (then the colonizer) was afraid of competition from other countries, Lyote, the then French General Resident, decided to “assign exploration and exploitation operations to the Cherfian State and for its account” by virtue of the decree of January 27, 1920, in order to prevent foreign powers and companies from extending their control over this important resource.⁷ Moreover, they made sure to include in the statute of the OCP the idea that it is not a system of direct management by the State, which made of it “a type of institution that has only one shareholder: the State”, and this enabled it to combine the flexibility of the private sector with the rigidity of the public sector.”⁸

The “independence” State maintained the same management pattern: “a public institution having a civil character and financial independence under the administrative control of the Ministry of Economy.”⁹ The OCP has always been and continues to be one of the instruments of Moroccan monarchy for the development of domestic capital that respects its share in an imperialist international division of labour.

The King has the monopoly of appointing the general managers of the company, whose chairmanship is rotated among members of capitalist families and others who have held diplomatic positions. The most important being the current president Mustafa Terrab, who was previously the Chief Organization Specialist at the World Bank (Washington, 2002).¹⁰ The company is under the supervision of the International Monetary Fund and the World Bank through annual meetings.

In 1974, the Moroccan Fertilizer Company (Vertima), which was established in 1972, was acquired by the OCP, and in 1999 this company has been privatized, which had ultimately made the Fertilizer Company have a monopoly on meeting all local needs of phosphate fertilizers.¹¹

However, the major turning point in the history of the OCP was on February 26, 2008, when it was turned into a Public Limited Company, and this was the beginning of its integration into the Moroccan banking capital, as on January 12, 2009, “the joint venture between the OCP Group and the Banque Centrale Populaire (BCP) took place, according to which the BCP acquired 5.88% of the OCP Group, and, similarly, the OCP Group acquired 6.6% of the capital of the BCP”.¹²

Consequently, the main concern of the Company would be to guarantee the profits of shareholders and abide by their directives, like all shareholding companies, as is expressed literally by its current chairman Mustafa Terrab, saying: “We have replaced the monopoly tax - at the time the Office Chérifiens des Phosphates was a public institution - with a policy of

7 <https://centenaire.ocpgroup.ma/en/chronology>.

8 <https://centenaire.ocpgroup.ma/en/chronology?id=1920-08-07>.

9 <https://centenaire.ocpgroup.ma/en/chronology?id=1960-07-29>.

10 <https://centenaire.ocpgroup.ma/en/chronology?id=2006-02-15>.

11 <https://centenaire.ocpgroup.ma/en/chronology?id=1974-01-01>.

12 <https://centenaire.ocpgroup.ma/en/chronology?id=2009-01-12>.

dividend distribution that allows public limited companies to pay their shareholders' dues.¹³

The capitalist perspective of the company is clear. They have appointed Mohamed Jamali as General Manager of 'OCP Africa'. The latter had been for 3 years the Director General of Log dev Africa's, specializing in real estate exploration and development for logistics activities, which is a branch of the National Transport and Logistics Company (SNTL). Since its establishment, OCP Africa has endeavored to "transform traditional and subsistence farming, the most widespread farming pattern in Africa... to farming that creates value and wealth."¹⁴The concepts of "value and wealth creation" are key concepts of the neoliberal choices of the State in Morocco and of the major capitalist groupings, on top of which comes OCP, a big investor and development Leader that creates "value and wealth", whose effects will be extended later to other segments of society, according to the myth promoted by the World Bank literature.

The institution, classified as strategic, remains out of parliamentary accountability. The report of the judges of the Supreme Council of Auditors in March 2019 only published a summary that did not exceed 11 pages, concealing the details under the pretext of "the sensitivity of the aspects dealt with by the mission and the nature of the data used, whose publication could lead to harm to the interests of the complex."¹⁵

4. Fertilizers: one platform among others to invade the African continent

The objective is therefore to transfer the experience of the agricultural policy adopted in Morocco (the Green Plan and currently the Green Generation Plan), a policy based on the stimulation of large capital investments in agriculture, as a pioneer of development, along with other sectors.

Morocco is not only exporting fertilizers, but also a large capitalist agricultural model, which Elias Fally, Managing Director of Corporate Strategy and Sustainability at OCP, has not concealed by saying: "Cooperation between the public and private sectors will be required in the future."¹⁶ The Public-Private Partnership (PPP) is a private capital Trojan horse to break into sectors hitherto distant from it, or evade the cost of investing in its infrastructure, while monopolizing the fruits of its revenues and profits. In this context, the Moroccan delegation to the meeting of the African Peace and Security Council devoted to food security in Africa (May 2022) stressed "the need to adopt the necessary policies to stimulate economic and structural transformation in Africa."¹⁷

What the OCP has been doing since 2015 is a sectoral implementation of a general strategy for large capital (local and global) and the state, which is included in a document issued

13 4/6/2022 . <https://bit.ly/3UneYQE>

14 20/09/2022, <https://assahraa.ma/web/2020/151453>.

15 Al-Akhbar Al-Yawm Newspaper, March 20, 2019.

16 «Le groupe OCP offre à l'Afrique 550.000 tonnes d 'engrais», Mehdi Ouazzani MEHDI OUAZZANI, 21 July 2022, <https://www.challenge.ma/us-africa-business-summit-ocp-accelere-ses-efforts-pour-aider-lafrique-en-matiere-de-securite-alimentaire-242796/>.

17 ^{الرجنتين} «CPS de l 'UA: La sécurité alimentaire en Afrique, une priorité du Maroc dans le cadre de l 'action africaine commune (Ambassadeur)», 09 May 2022, <https://www.mapnews.ma/fr/actualites/politique/cps-de-lua-la-s-%C3%A9curit-%C3%A9-alimentaire-en-afrique-une-priorit-%C3%A9-du-maroc-dans-le>.

by the Ministry of Finance, which states: “winning the confidence of companies as well as potential investors requires institutional updates for the sectors (authorized management, concession and privatization) ... In this area, Morocco has a rich experience and a convincing level of experience... that can be shared with African countries”.¹⁸

5. Reproducing the hierarchy of the imperialist system

In its relationship with Africa, Morocco reproduces the same hierarchy that exists in the global market between imperialist countries/ center and affiliated countries/parties, especially when talking about “aid and discounted prices”: “A senior official of OCP said the group will offer 180 thousand tons of fertilizers as aid and 370 thousand tons at discounted prices to help African countries cope with increasing prices... In an interview with Reuters, Nada Al-Majdoub, Executive Vice President of Performance Management, said that the quantities offered and discounted account for 16% of African demand this year and a quarter of the sales of the OCP Group on the continent”.¹⁹

The logic of food assistance is destructive to local production and the small farmer, contrary to the claims of OCP representatives, as the channels to commercialize local products are narrowed and the local market is flooded with imported product and changing food habits. In addition, aid providers are always looking for the guaranteed success of their project. Long ago, Michel Husson and Thomas Courtot warned about this, saying: “This is how we see projects that claim to be “oriented towards the poorest”, distributing their wealth mainly to “advanced” farmers who are better off than the average farmer and who are supposed to be able to increase their production as quickly as possible”.²⁰

OCP adopts the same criticism of the international financial institutions of third world countries regarding obstacles to private (capital) investment: “threats in some African countries, in this case, insecurity, lack of infrastructure, dominant subsistence agriculture, political instability, a failed legal framework that does not protect investors’ rights, corruption...”.²¹ The objective is therefore to remove everything that prevents investors, especially the OCP, from invading the continent.

OCP started this process by “launching a Fertilizer Complex in Ethiopia, with an investment of US \$3.7 billion”²², and “an agreement with Nigeria to build a fertilizer factory worth more than US \$1.3 billion.”²³

6. Proceeds of crisis

In the context of the Covid-19 pandemic, OCP’s revenues have risen significantly, as expressed

18 «العلاقات المغربية الإفريقية، الطموح إلى حدود جديدة»، وزارة الاقتصاد والمالية، مديرية الدراسات والتوقعات المالية، ماي 2015، <https://bit.ly/3Eo44Vr>.
19 «Le groupe OCP offre à l’Afrique 550.000 tonnes d’engrais», Mehdi Ouazzani MEHDI OUAZZANI, 21 July 2022, <https://www.challenge.ma/us-africa-business-summit-ocp-accelere-ses-efforts-pour-aider-lafrique-en-matiere-de-securite-alimentaire-242796/>.

20 «على أبواب القرن الواحد والعشرين، أين أصبح العالم الثالث؟»، توماس كوتور وميشيل هوسون، ترجمة نخلة فريفر، الدار الجماهيرية للنشر والتوزيع والإعلان، ص 155. 177.

21 «OCP Group: Grand garant de la sécurité alimentaire en Afrique subsaharienne», Par Abdelaziz RHEZALI, 24 September 2021, <https://maroc-diplomatique.net/ocp-group-grand-garant-de-la-securite-alimentaire-en-afrique-subsa-harienne/>.

22 same reference.

23 «Exclusif ☑ Mostafa Terrab : « Le futur d’OCP, c’est le développement vert » (1/2)», 27 mai 2021, Par Estelle Maussion et Julien Cléménçot, <https://www.jeuneafrique.com/1178369/economie/exclusif-1-2-mostafa-terrab-le-futur-docp-cest-le-developpement-vert/>.

with admiration by the CEO of the complex in an interview with Jeune Afrique magazine: “The increase in our sales volume in the context of a low cycle, which was also characterized by the complaint submitted by our American competitor, is a remarkable achievement”.²⁴

In the same context, Aziz Rabah, Minister of Energy, Minerals and Environment, revealed that “the production of phosphate by the Office Chérifien des Phosphates increased by about 6.2% during 2020”.²⁵

The same is true of the sales of OCP during the Russia-Ukraine war. It achieved “a sales value of about 25.33 billion dirhams during the first quarter of 2022, i.e. an increase of 77% compared to the results achieved during the same period last year”.²⁶

A statement from OCP did not hide the reason for this result, saying, “The Russian-Ukrainian conflict has intensified the unstable context with regard to the balance between supply and demand within the phosphate market, which has led to a further increase in the prices of raw materials, particularly ammonia and sulfur”.²⁷

The main question that can be raised here is: who are the beneficiaries of these colossal revenues? Will they contribute to mitigating the erosion of state revenues? Will their effects reach small-scale food producers and consumers?

The answer rests on the nature of the institution and the economic framework within which it operates, rather than on the stated intentions of state officials and the OCP.

7. Limits of the proceeds boom

This surge of revenues has limits, the most important of which are:

a. Heavy indebtedness:

OCP’s investments are mainly financed through debt. In 2018, these debts amounted to 35 billion dirhams.²⁸ The head of the Group, Mustafa Tarrab, justifies these debts with a turnover amounting to 55 billion dirhams and a net result of 5.4 billion dirhams, and the expectation of continued growth in demand and consumption. However, these projections do not consider the volatility of the global phosphate market, as any decline will lead to heavy indebtedness as well as over-extraction to maintain the same level of revenues.

Historical precedents justify this. After the rise in phosphate revenues in the early 1970s, the collapse of its price and the rise in the price of oil globally, combined with a harsh dry season, imposed “austerity measures and clean-up of public finances”.²⁹ From mid- 2007 to mid-2008, the price of crude phosphate was approximately US \$400, which is equivalent to 10 times the price level before 2007,³⁰ but this period led to the accumulation of a heavy

24 June 4, 2021, <https://bit.ly/3tv2Pxr>

25 14/06/2021, <https://bit.ly/3fLqyWD>

26 17/05/2022 <https://bit.ly/3DPFqLF>

27 same reference.

28 26/03/2019. <https://bit.ly/3UITKT6>

29 «المغرب الممكن، إسهام في النقاش العام من أجل طموح مشترك»، تقرير الخمسينية، مطبعة دار النشر المغربية، الدار البيضاء، 2006، ص 143.

30 <https://centenaire.ocpgroup.ma/en/chronology?id=2008-03-01>.

debt legacy since returns are short-termed, while indebtedness is long-termed and with constraining conditions.

The size and cost of the indebtedness will worsen with the recent rise in interest rates by the Central Bank of the United States, and the Central Bank of Morocco adopted the same measure to reduce current inflation.

b. Competition and trade wars:

Competition in the international fertilizer market is very strong. The high revenue figure for 2020 is due to “reduced supply amidst declining Chinese exports and declining stocks in India and the United States”.³¹

This is in addition to the protectionism of the Northern countries, including the United States of America. In mid-2020, the company Mosaique filed complaints to the United States against the OCP for trade dumping. After investigation, the authorities gave Mosaique justice and decided in March to impose compensatory duties on exports of up to 19.97%.³²

c. High Gas Prices:

Gas is a major component of all phosphorus fertilizers as well as nitrogen fertilizers. Morocco is a major importer of gas. Morocco’s consumption of natural gas is about 1 billion cubic meters per year, according to the statements of the Minister of Energy Transition and Sustainable Development, Dr. Leila Benali. In return, local gas production is about 110 million cubic meters per year only, which makes locally produced gas meet only 11% of Morocco’s total consumption of natural gas.³³ Higher gas prices will thus adjust the balance at the expense of revenues.

d. Chronic water scarcity:

Per capita water share decreased from 2,500 cubic meters in 1960 to 700 in 2019, a 75 % decline.³⁴ Phosphate production consumes a lot of water. Relying on desalination technology is very costly, as “Morocco’s increasing reliance on desalination plants to meet industrial, agricultural and residential needs will require significant new investments in renewable energy generation. Desalination plants require 10 times the amount of energy to produce the same volume of water as conventional surface water treatment”.³⁵

31 10/23/2021 <https://bit.ly/3WLOsrY>

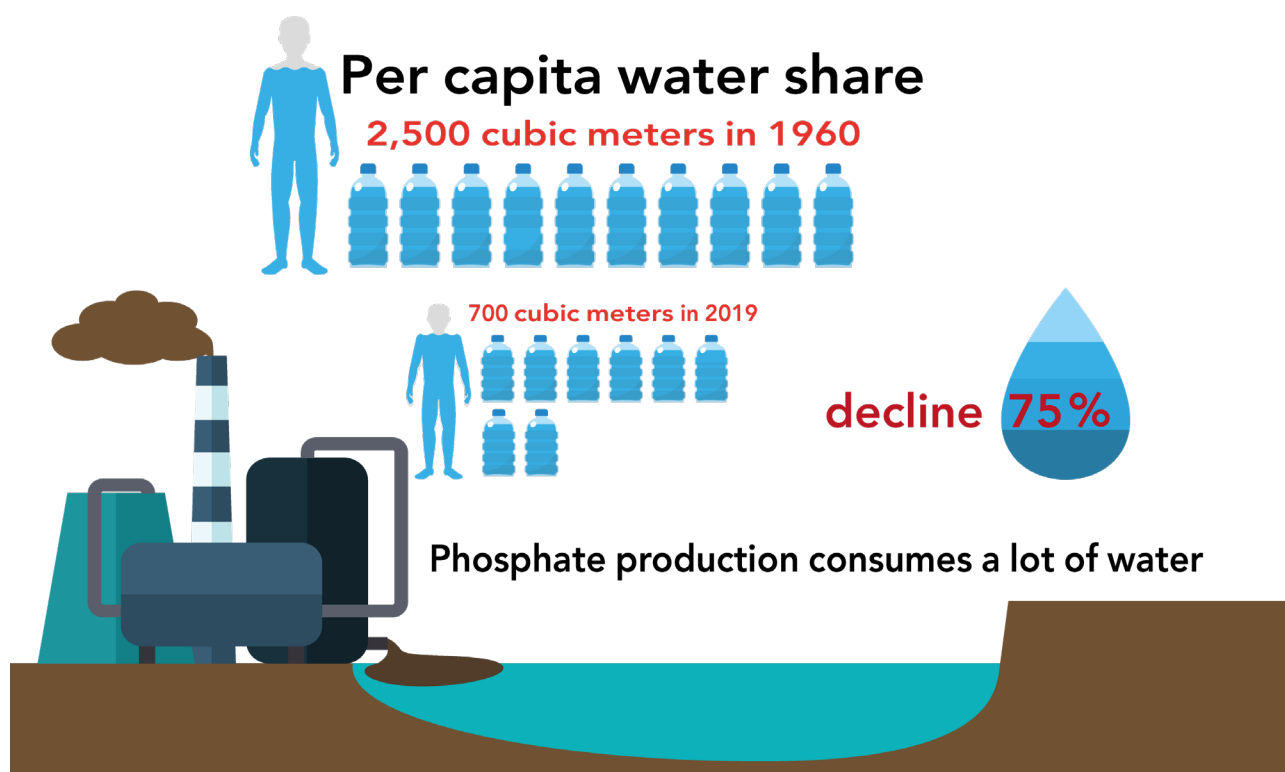
32 «Exclusif ☑ Mostafa Terrab : « Le futur d ‘OCP, c ‘est le développement vert » (1/2)», 27 mai 2021, Par Estelle Maussion et Julien Cléménçot, <https://www.jeuneafrique.com/1178369/economie/exclusif-1-2-mostafa-terrab-le-futur-docp-cest-le-developpement-vert/>.

33 2022-09-22, <https://bit.ly/3EfZSXm>

34 «Impacts de la stratégie nationale de l’hydrogène vert d sur les ressources en eau au Maroc», Atelier thématique-Organisations de la Société Civil, HenrichPollStiftung et Mena Renewables et Sustunability, Rabat-Maroc, 23 July 2022.

35 “How Morocco could use its Solar Energy and abundant Phosphorous to Feed the World and Offset Russia”, by MichaëlTanchum, Universidad de Navarra, July 10, 2022, <https://theconversation.com/morocco-a-top-fertiliser-producer-could-hold-a-key-to-the-worlds-food-supply-180797>.

Chronic water scarcity



8. What about the contribution of OCP to the state's finances?

It should be noted at the outset that OCP enjoys free access to “Moroccan subsoil which significantly reduces its production costs.”³⁶ Although Mustafa Terrab referred to OCP” as a contributor or taxpayer that is not commensurate with what used to be the case.”³⁷ However, the Group continued, under the pretext of its high debts, “to demand from the state a VAT refund,” which the State did in 2018, when Mohamed Ben shaboun, the then Minister of Finance, stated that “the state, at the end of June 2018, is no longer a debtor to the Group, as it fully refunded VAT arrears of 20.4 billion dirhams”.³⁸

Apart from what is called in the capital logic “external costs”, that is, over-extraction³⁹ and destruction of the environment, the law of the market makes States with export economies vulnerable in both cases: raising the volume of production in the event of higher prices on the world market to achieve the highest revenues, as well as raising it in the event of lower prices to maintain previous levels of revenue, thus depleting that natural wealth. During the Covid-19 pandemic, OCP managed to “compensate for the decline in prices in the international market by increasing the quantities of products exported”.⁴⁰

As for the environment, the OCP slogan “More and better production, with less pollution” applies only to the first part of the slogan. The OCP plans to produce an additional 8.2 million

36 June 4, 2021, », <https://bit.ly/3Tfp6cN>

37 same reference.

38 24/10/2018, <https://v2.ahdath.info/429981>.

39 <https://attacmaroc.org/الصع-الاستخراجي-،-كتاب-الديون-والنظام-الإستخراجي>.

40 21-11-2022, <https://bit.ly/3fKAD6c>

tons of phosphorus fertilizer by 2026. Production now stands at about 12 million tons.⁴¹As for environmental damage, the report of the judges of the Supreme Council of Auditors (March 2019) didn't share any detail relating to the environmental impact of OCP mining activity.

9. The small farmer: Waiting for a flow that does not come

The much-promoted "flow theory" of the World Bank is based on the idea that "the positive fallout of growth flows in favor of the richest at first, but eventually reaches the poorest. It is therefore in the best interest of the latter that growth be as strong as possible, because the scraps of wealth that reach them depend on it. Indeed, if growth is weak, the rich retain a greater share than if growth were strong."⁴²

However, small farmers are rather impacted by reality, not theories. High prices for fertilizer inputs, mainly the imported natural gas, as well as the global pricing of phosphate will only lead to increasing fertilizer prices on the world market, to the detriment of small farmers.

Fertilizer prices in the local market increased by 41% in the agricultural season 2021-2022, compared to the previous season.⁴³ In September 2022, the international rating agency Fitch Rating revealed expectations that the price of Moroccan fertilizers would increase from the current \$200 per ton to \$270 by the end of the current year, due to global storage fears and constraints.⁴⁴

Sugar production is among the most affected sectors. To stimulate the start of the agricultural season 2021-2022, farmers cooperatives in the sugar sector benefited from good and stable prices of fertilizers throughout the agricultural season despite the high prices in the national and international market. However, the upward trend in fertilizer prices in the global market is undermining this support along with the farmers' revenue margin, as was acknowledged by the report of the "Interim Thematic Working Group on Food Security in the House of Counsellors" on "Food Security." The report stipulates "However, since September 2021, until now, fertilizer prices have remained in an upward trend at the national and international market level, especially nitrogen fertilizers... Potash fertilizers, potash chloride and potash sulphate, also saw a rise in prices by about 42% to 830 dirhams a quintal and 1300 dirhams a quintal, respectively." The report finds that: "as a result, the current price level in the national and international markets will increase the costs of fertilization of sugar crops by about 4700 dirham/ha, which will lead to a decrease in the net profit margin for farmers by 23%, approximately 240 million dirhams in total".⁴⁵

The high prices of inputs, including fertilizers and fuel, provoked the protest of unionized farmers. The members of the Federation of Professional Unions in Morocco organized a strike accompanied by protest marches for three days 26, 27 and 28 October 2022. These were the big farmers who own the plowing and harvesting machines, while the small farmer

41 "How Morocco could use its Solar Energy and abundant Phosphorous to Feed the World and Offset Russia", by Michaël Tanchum, Universidad de Navarra, July 10, 2022, <https://theconversation.com/morocco-a-top-fertiliser-producer-could-hold-a-key-to-the-worlds-food-supply-180797>.

42 «البنك العالمي، تاريخ نقدي»، إريك توسان، ترجمة ونشر جمعية أطاك المغرب عضو لجنة إلغاء الديون غير الشرعية، أبريل 2022، ص 197.

43 01/11/2021, <https://anwarpress.com/225919.html>.

44 20/09/2022, <https://bit.ly/3UyAj9o>

45 «الأمن الغذائي بالمغرب، تقرير»، مجموعة العمل الموضوعاتية المؤقتة حول الأمن الغذائي بمجلس المستشارين، يوليوز 2022، ص 114-115.

sare non-unionized, and awaiting divine mercy or the scant support provided by the state.⁴⁶

10. Are there any alternatives?

OCP speaks of food security and energy transition, while the report of the “New Development Model Committee” appointed by the King addressed the concept of “food sovereignty”. However, all these concepts have been robbed from militant movements while keeping the same major capitalist options in the agricultural sector, as in the economy.

OCP’s writings build on the concept of food security of global organizations, including the Food and Agriculture Organization of the United Nations, as being “the ability of the individual to secure food.” By focusing on the concept of the individual rather than the collective, and on the concepts of supply and demand, these institutions (including, of course, the OCP), maintain the principle of the commodification of food production and ensure its monopoly in the hands of large, efficient, high-capacity corporations in the same productivist/extractive perspective.

In a report released by OPC in 2020, it is stated that “thinking beyond the current crisis, we recognize that to ensure long-term food security, the entire value chain must come together to improve the way we produce, process, and consume food. The OCP is a vital player in this value chain, and has been at the forefront of innovation in the fertilizer industry”.⁴⁷ Thus, reducing “feeding the planet” to mere technical measures, without asking who determines farming policies? What are features of the real estate structure? who monopolizes the land? Who produces and for whom? And what about the question of OCP structuring and the transformations it has undergone since its transformation into a shareholder company and its integration with the bank capital, and its escape from the control of the legislative institution... etc.

In this context, any gains the company makes will only badly affect small farmers and the final consumer, while large revenues will be spent on paying its investment debts, shareholder contributions and the large salaries of its administrative staff.

The company should return to public ownership under citizen, popular and labor control, and fertilizers should be provided to the local market in the first place, coupled with a major role for the state in price control, the cessation of generous subsidies directed at large capital investment to the benefit of small farmers, and access to public bank financing at very low prices for small food producers.

Achieving food sovereignty will not be possible within such a capitalist logic that currently prevails at the heart of the OCP. Revenues will increase whenever the international context would be favorable, then they will be dilapidated as usual, and whenever prices fall, the existing reserves will be squeezed. However, the small farmer will always be that unheard-of soldier who has to carry the burden of a portion of the company’s very high revenues.

Mohamed Boulalam

Researcher / Morocco

Email: boulalamm@yahoo.fr

⁴⁶ 28/09/2022, <https://www.aps.dz/en/monde/132118-2022-09-28-13-23-53>.

⁴⁷ “Sustainability Report, Working Together for Sustainable Agriculture”, OCP, 2020.

The war within the war or how the IMF is controlling what is left of Tunisia's food structure?

The Russian-Ukrainian war has created an inherently tense situation, to which crisis after crisis have been added. A political crisis has emerged since Ennahda forced the Fakhfakh government to resign in July 2020 and the President Kais Saied's rejection of the ministerial shuffles of Prime Minister Hichem Mechichi, the latter having been chosen by Kais to then team up with Ennahda, which has resulted in a government whose ministers are mostly interim ministers. This culminated in the exceptional measures taken by Kais Saied on July 25 to dismiss the government and then dissolve parliament in order to have all powers concentrated in his hands.

In addition, Tunisia is experiencing an economic indicators crisis, with high inflation rates and difficulties in the financial balance of many public institutions. However, the most prominent signs of this crisis have been the constant downgrades in the ratings of Tunisia¹ among various international rating institutions due to its failure to implement "reforms", which has led the global financial markets to deny access to the Tunisian government, and to shut down the possibilities of borrowing from "sister" countries and international funding institutions. Thus, the year 2022 was placed under the sign of the frantic search for an agreement with the International Monetary Fund in order to "rebuild the trust of markets and donors" towards Tunisia.

Hence, the Russian war occurred within this context, carrying with it the cereal crisis - its high prices and scarcity of sources - as well as the increase in fuel prices and the worsening of inflation since the end of the pandemic. However, the war has not brought, for Tunisia, those expected consequences arising from the aforementioned aspects in the global markets of wheat and oil alone. It was also an opportunity for the International Monetary Fund to tighten its grip on the Tunisian Government, taking advantage of the resulting growing trade deficit and the decline in its hard currency reserves.

Thus, the Fund has imposed on the Tunisian government a severe austerity policy to allow it to have access to loans, which would help revitalize its economic indicators and reopen the doors to world markets. Therefore, there was a twofold war on the Tunisian food system: the Russian war on Ukraine and the IMF war through the artillery of debts and the tanks of austerity in all areas, which have ravaged the nation.

Tunisia's status before the pandemic: an export-oriented agriculture

The cultivated area in Tunisia is about 4 million and 200 thousand hectares,² of which about 55% is allocated to fruit trees (two million and 300 thousand hectares) and 28% to cereals (one million and 200 thousand hectares). Pulse crops and vegetables occupy only 5% (230

¹ See for example : Notation en baisse de la Tunisie, qu'elle est la cause? - L'économiste maghrébin - Mars.2022

² Yearbook of Agricultural Statistics (2019)

thousand hectares). Olive cultivation accounts for one million and 700 thousand hectares³, about 73% of the area allocated to fruit trees. This is a preliminary overview of Tunisia's agricultural map in 2018. However, these figures can also be viewed within a chronological context. Looking in particular at the areas allocated to cereals, we notice a steady decline since the mid-1980s until recent years, from rates exceeding one million 500 thousand hectares⁴ to one million 260 thousand hectares in the last decade⁵, representing a decline of 16%. In fact, the State's needs in cereals have increased in the same period, and have pushed it to import more, as quantities imported have increased from about one million tons per year to two million and 500 thousand tons,⁶ resulting in a sustained deficit in the indicator of cereal needs coverage amounting to 45%.⁷ The area allocated to pulse crops and vegetables has remained relatively stable at 230,000 hectares. On the other hand, the State has encouraged investment in olive and citrus farming.⁸

Therefore, the agricultural policy is tending to neglect the basic crops for feeding Tunisians, such as wheat, and instead expands export crops such as citrus fruits and olive oils. This policy has its roots in earlier colonialism. The French colonizer considered Tunisian agricultural land to be entirely under its control, and used it to ensure its food security, and to provide a back-up in case of disasters on its land. For example, researcher Haithem Smida Kasmi reports that *"In 1932, wine growing in Tunisia was expanded due to its wine to reach an area of about 50,000 hectares, 90% of which was exported to the French market following the devastation of French vines caused by the Phylloxera insect. The economic depression of 1929 also triggered the expansion of citrus production, which proved to be a lucrative commercial agriculture to compensate for the global cereal overproduction crisis, thus bringing about the so-called "citrus revolution" reinforced by Spanish production shortages due to the civil war and the disruption of Italian exports as a punishment for its invasion of Ethiopia. On the other hand, with regard to cereal production, Tunisian farmers were only familiar with durum wheat and barley farming until the French colonial authorities introduced soft wheat in agricultural cereal production, which was mainly intended for export to the country of "baguette"."*⁹

This dependence has been enhanced, especially during the period of "openness" Tunisia, e.i. open market policies, has gone through since the seventies, with one of its most prominent aspects being the Northern Waters Project,¹⁰ accomplished at the end of the seventies, to divert the waters of the North towards the Cap Bon region, a region dedicated to citrus production. Today, citrus fruits consume between 22% and 33% of Tunisian dams storage capacity,¹¹ depending on years. These open market policies continued after the introduction of the agricultural structural reform program in Tunisia at the end of the 80s whose objective is to get the State to withdraw from its adjusting role in the agricultural sector, allowing

3 Our food, our farming, our sovereignty. Working Group on Food Sovereignty, June 2019.

4 Analyse de la filière céréalière en Tunisie et identification des principaux points de dysfonctionnement à l'origine des pertes - FAO Publication.

5 Yearbook of Agricultural Statistics (2019)

6 Analysis of the cereal branch...

7 same reference.

8 Our food, our farming, our sovereignty...

9 جذور سياسات التبعية: في تاريخية امتصاص الفائض الزراعي. هيثم صميده القاسمي، موقع إنحياز. (من ملف <<قمي لا ينقسم>>)

10 Or " Sidi Salem integrated project " (our food, our agriculture, our sovereignty...)

11 The amount of water for citrus is estimated at 316 million cubic meters, while dam storage in 2017 is equivalent to 944 million cubic meters against 1400 million cubic meters the previous three years (our food, our farming, our sovereignty ...)

the law of the market to dominate. An example of this is fodder; the State took away the responsibility for supplying the corn needed to produce it from the Cereal Agency (Office des Céréales) which is a public institution, to allocate it exclusively to a private company -Carthage Grains- in the 1990s. In addition, most of the cereal collection and distribution channels, which were the exclusive responsibility of the Cereal Agency¹² in the early 2000s, have been privatized.

The state of agricultural policies in Tunisia prior to the pandemic can therefore be summarized as being limited to a food security approach, i.e. relying on the world market to provide the necessary food while promoting an export-oriented agriculture. This entails the depletion of water resources and the shrinking of crop areas intended primarily to feed the population, as well as the destruction of soils through the adoption of the single-crop model and the associated use of chemical fertilizers, in addition to the exposure of these crops to a variety of diseases, which in turn increases the consumption of pesticides.

How about cereals?

Cereals are the main nutrition element for Tunisians, representing 49% of calories, 50% of proteins, 42% of iron and 19% of calcium in their food regime.¹³ The State policy aimed at ensuring food security through market mechanisms has led to the marginalization of its farming to the extent of importing 55% of our needs - that is to say, we import more than we produce - whereas between 1962 and 1966, for example, imports amounted to one third of the quantities produced locally,¹⁴ (noting that the Tunisian government exported at that time some quantities of durum wheat to replace them with soft wheat, being a cheaper crop. As a matter of fact, cereals remained the only agriculture production in which the State could intervene to a certain extent. The Tunisian government relied on local production and imports to supply cereals. The Cereal Agency, as a public institution, is representing then the State's arm in this area. On the one hand, it is charged with purchasing cereals from producers at fixed prices from the beginning of the cereal-growing season, and on the other hand, with supplying cereals from the world market. The purchase prices of the Cereal Agency from the international market or from local producers are higher than the selling prices in the internal market. In this context, the compensation fund¹⁵ will provide the gap between the two prices to the Cereals Agency. However, over time, this compensation mechanism has changed, especially with the advent of structural reform, from a tool to encourage producers by securing them a decent profit margin to a tool for pressure on prices. Consequently, compensation has become a matter of financial cost alone, and the relationship with local producers is then governed solely by the logic of cost pressure, which translates into pressure on local market prices.¹⁶

12 تونس: هل تصبح وفرة الحبوب لعنة؟ ندى الطريقي، موقع بر الأمان، جويلية 2019.

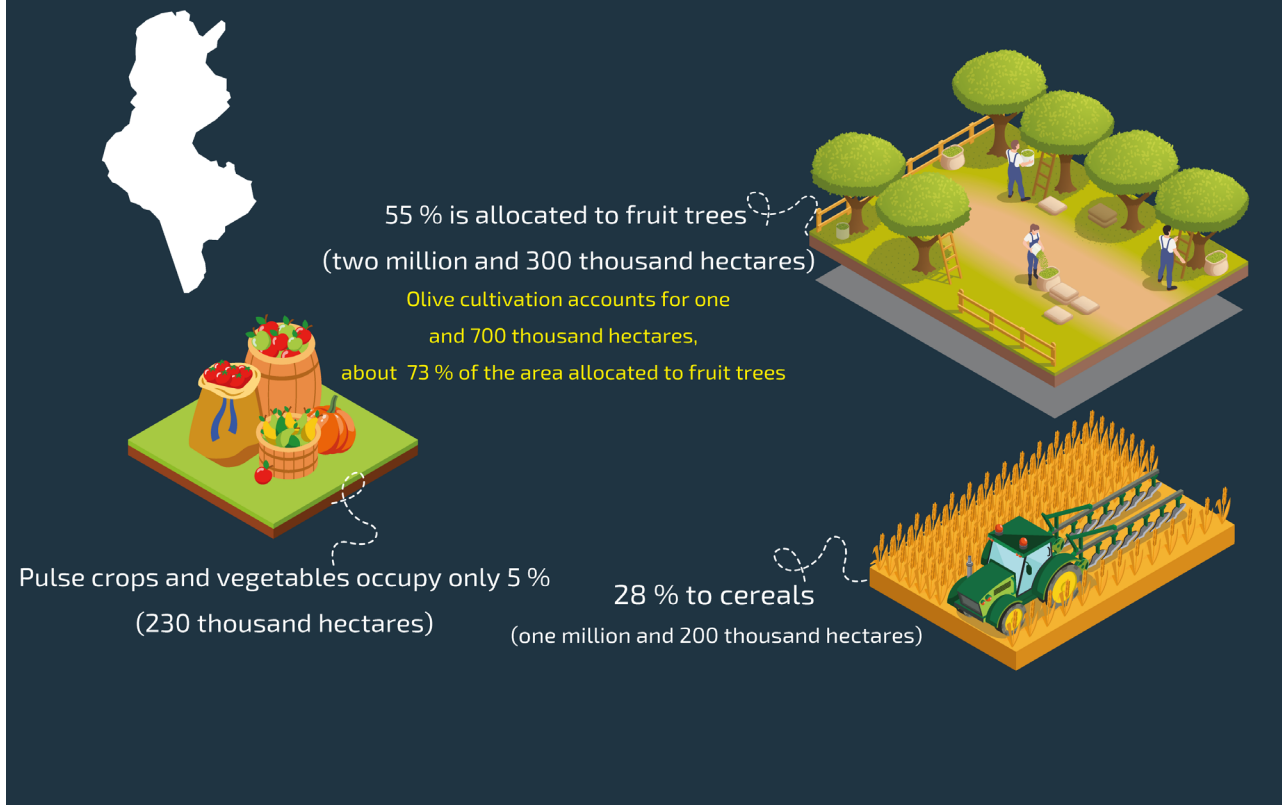
13 Analysis of the cereal branch...

14 Average quantities supplied 2,097 million quintals and average quantities produced 6,176 million quintals - 1966 Central Bank Report.

15 Called the "support fund".

16 من التعويض إلى الدعم: سيرورة القضاء على السياسة الغذائية الوطنية، وليد بسباس، موقع إنحياز، مارس 2022.

The cultivated area in Tunisia is about 4 million and 200 thousand hectares



All these policies have led to an increasing dependency on the world market for the supply of cereals. Tunisia's main suppliers are Russia and especially Ukraine, i.e. the first and fifth largest exporters of cereals in the world. For example, between 2017 and 2019, these two countries have accounted for more than half of our cereal imports.¹⁹ Needless to say, the war between these two countries will have a direct impact on our needs in cereals, since they are our main exporters of cereals, but also, and above all, since they provide a third of the world's cereal exports, creating a global supply crisis. However, the impact of the war on Tunisia will not be limited to cereals, but will also be affecting several food products.

The impact of the war on Tunisia

If we examine the roots of the Tunisian government's vulnerability to global crises, we must go back to the early 1970s, when the so-called socialist experience and the policy of growth through import substitution adopted by the government in the 1960s were abandoned in favor of the so-called "open market" policy led by Bourguiba's liberal minister, Hedi Nouira. At that time, the Tunisian government embarked on a policy of "growth through exports" based on the theory of comparative advantage: each country in this system must orient its production mechanism to the cheapest products in order to achieve self-sufficiency,

17 Sécurité alimentaire en Tunisie: Si l'état n'agit pas, il n'y aura plus de blé tunisiens, France 24.

18 Analysis of the cereal branch...

19 With a rate of 42% for Ukraine and 8.9% for Russia. See: كيف تهدد الحرب بين روسيا وأكرانيا الأمن الغذائي التونسي, EmnaElmornagui, inkifadaSite

exporting the surplus and importing what it lacks in products accounting for the comparative advantages of other countries.

The major underlying assumption here is that the market will adjust itself and make everyone happy. Because of the strong involvement of the Tunisian government in this system, the war has severely undermined the country's overall economic conditions. It has accelerated the rise in commodity prices, especially oil, further aggravating inflation already felt worldwide. This has worsened Tunisia's trade deficit. Until the end of August 2022, it has increased to the level of 16899 million dinars, which is an increase of 61%²⁰ with one of the most significant contributors to this deficit being energy which reached 6035 million dinars²¹ by the end of July 2022, representing an increase of 109% on year, and accounting for 35% of the trade deficit. The trade deficit has also been burdened by imports of cereals,²² which reached 2883 million dinars by the end of August 2022, representing 17% of the deficit. This accelerated deficit has, in turn, led to a decrease in the hard currency stock of the Tunisian government covering 106 days of imports in October 2022 against 131 days of imports at the same time last year.²³

But that's the point: the decrease in the stock of hard currency leaves the State with two options, given the logic of successive governments. Either reduce imports, which is not possible because it would expose Tunisia to sanctions under free trade agreements between Tunisia and northern countries. Also, attempts are made to increase exports, which is useless, since, like most of southern countries, Tunisia has a structural trade deficit, left over from colonial policies imposed on southern countries since the nineteenth century, which did not end after independence, but were institutionalized and legitimized under the umbrella of the Bretton Woods institutions.²⁴ Alternatively, it could seek a loan from the IMF as a second option. Indeed, all international donors have been reluctant to lend to the Tunisian government because, over the past decade, it has refrained from carrying out so-called "painful reforms". The decline in Tunisia's credit rating has been repeated until it reached the lowest rank of most rating institutions. The Covid-19 crisis and then the Russian war on Ukraine were an opportunity for the IMF to twist the arm of the Tunisian Government. Since the appointment of Najla Bouden's government, it has been exerting pressure on the Tunisian government, convinced that it is a government with strong political backing that would allow for the implementation of all the "painful reforms" required.

The IMF conditioned the launch of reforms before allowing Tunisia to receive the desired loan. Bouden's government has complied, and pressure has begun on public spending, as well as on public institutions, with recruitment being ceased. The pressure was particularly put on the expenditures of the compensation fund as a preliminary step to its elimination and replacement by a system of direct transfers to needy families. This pressure is reflected in the budget spending figures for the first half of the year 2022.²⁵ The budget deficit has been reduced by 75%. Although the government has allocated 7262 million dinars as support

20 INS Figures

21 Tunisie: The deficit commercial frôle les 17 milliards of dinars in fin Juillet 2022. *L'économiste maghrébin*.

22 INS Figures

23 Central Bank figures

24 Plunder in the post-colonial era: Quantifying drains from the Global South through unequal exchange, 1960-2018. Jason Hickel, Dylan Sullivan & Huzaiifa Zoomkawala.

25 Provisional results of the state budget performance till the end of June 2022. Tunisian Ministry of Finance.

expenditures for 2022, it has allocated only 2111 million dinars by the end of June 2022 (29%). We note, however, the dramatic decrease in the amounts of subsidies allocated to basic commodities, since an amount of 3771 million dinars was allocated in this section, of which only 400 million dinars (10.6%) were disbursed, compared to 850 million dinars in the same period of 2021, despite the sharp rise in commodity prices observed since last year. All of this has occurred despite the increase in the Tunisian government's revenues from 15818 million dinars in the first half of 2021 to 19323 million dinars in the same period in 2022.²⁶

This austerity policy applied to subsidy expenditure has caused a lot of damage. The first of these is the meager cereal harvest that has been collected on the Tunisian territory. As we mentioned at the beginning, the purchase price set by the State has a direct impact on land yields, but also on the areas cultivated. Despite the relative increase in the purchase price of cereals on the domestic market,²⁷ it has remained remarkably low compared to world prices. The purchase price for a quintal of local durum wheat was set at 130 dinars, compared with world market prices of 190 dinars²⁸ since the beginning of the year, and the purchase price for a quintal of soft wheat was 100 dinars, compared with world market prices of over 130 dinars since April 2022. These prices have not encouraged farmers to grow cereals in this season, especially small-scale ones, in a context where farms with an area of less than 20 hectares represent 87% of total cereal farms.²⁹ Additionally, these low prices do not allow for a sufficient profit margin, nor for the acquisition of new equipment, nor even for the maintenance of existing equipment.³⁰ As a result of low purchase prices compared to international prices, smuggling accounts for a significant portion of the cereal harvest, estimated at 15% of the harvest in Kairouan for instance.³¹

On the other hand, spending austerity measures on subsidies have adversely impacted the budgets of public institutions in charge of imports, such as the Cereals Agency, the Oil Agency, and the Trade Agency. It has become common for ships loaded with cereals to remain at the Tunisian coast awaiting payment from the Cereals Agency.³² The austerity policy has also led to a similar crisis at the Oil Agency, resulting in a shortage in the markets, as the imported quantities of vegetable oil (subsidized and then channelled to lower income groups) have decreased from 162,000 tons in the first six months of 2019 to 139,000 tons in the same period of 2022.³³ The Trade Agency has also had its share of crises, as the Tunisian government had experienced a severe shortage of sugar and coffee during the summer period.

Thus, the Tunisian government did not address the remnants of the war, but was a key player in deepening the crisis at home. Apart from its intervention to fix the price of animal feed against barons importing this good, it has added an economic crisis to a possible food crisis. This austerity policy led to the closure of some vegetable oil canning factories³⁴ and the worsening of coffee shop conditions.³⁵ The damage has even reached bakeries, as the

26 Same source

27 Cereal Agency figures

28 Food trade balance to the end of August 2022. Ministry of Agriculture.

Analysis of the cereal branch...

29

30 Sécurité Alimentaire in Tunisie: «Si l'état n'agit pas, il n'y aura plus de blé tunisien», France 24.

31 Same source

32 - بشير الكثيري: تونس لديها مخزون من الحبوب ما يكفي لشهر أبريل Express FM Radio 32

33 - في الأمن الغذائي أولويات: تقلص المشتريات من السلع الغذائية والتعشيف يكشف عن نفسه. شراز الرحالي، جريدة المغرب. 33

34 Pénuries d'huile végétale: à cause des impayés de l'état, des usines sont en péril. Business News.

35 Pénuries en Tunisie: cafetiers en équilibre précaire, Manel Derbali, Nawaat.org

government has refrained from providing them with subsidies, which made their situation critical.³⁶

Policies to be implemented to secure food for all social segments

All of the aforementioned is merely an indication of the fact that Tunisia, given its current governments, can only carry on with the colonial extractive agricultural policies. These governments are organically and ideologically linked to the interests of imperialism, and they cannot change one single bit in this approach. These policies will continue to place food and the fate of Tunisians in the hands of the global market, exacerbating food crises and accelerating their frequency along with global crises. However, this will not prevent us from highlighting what these governments can do sooner or later to first mitigate these crises and subsequently break with their causes, nor will we give up on telling the truth, as this is in itself a revolutionary act.

What has been mentioned above resulted from two main issues: the first one is the reliance of Tunisian farmland on a predominantly export-oriented agricultural model, which has been demonstrated, for example, through the nature of crops, as well as the amount of water resources allocated to them. The second is the Tunisian government's engagement in austerity and reform policies. First, let's agree on what these policies actually are. They are, in essence,³⁷ budget contraction policies reducing the provision of credit to all the components of economy, but are primarily being applied on the public sector so that it does not compete with the private sector (hence the propaganda of liberals about the budget deficit), thereby reducing the resources of the State and its capacity for investment and financial expansion.³⁸ They are also policies that always tend to let the market's invisible hand play its role through the emergence of price reality, which explains the constant pressure for the elimination of "subsidies". To overcome these two crises - immediate and structural - we must keep in mind their root causes.

First, the Tunisian government cannot provide the necessary food to Tunisians while pursuing its austerity policy, which are two totally opposite objectives.³⁹ The austerity policy is not related to the State's revenues, but rather to an ideological project whereby the State gives up its role as the guardian and be replaced by the market. All of this is done to satisfy the International Monetary Fund, "the rescuer" of governments with its loans for every crisis. The sustainability of the compensation fund must therefore be fiercely defended, as it is an essential element in any agricultural policy adopted by the State. The first measure to be taken under the compensation fund is to increase the purchase price of local cereals to bring it into line with international prices, as an incentive for farmers to cultivate the largest areas possible and to be able to carry out the maintenance work needed for their equipment. At the same time, opportunities for the smuggling of cereals would be eliminated.

³⁶ أصحاب المخازن يطالبون بصرف مستحقاتهم، جريدة الشروق، 24 جوان 2022.

³⁷ صندوق النقد وذاكرة الإصلاحات المفقودة: الأسس النظرية للإصلاح الهيكلي، وليد بسباس، موقع إنحياز، ماي 2021.

³⁸ *In a capitalist economy, it is not the economic activity that creates the financial activity, but the financial activity that prepares the ground for the expansion of the market and anticipates the economic activity to pave the way for it. Increasing the supply of money through the credit process stimulates economic mobility. You borrow when you want to start a business, first getting credit and then put the money to work. It is the widespread of money that creates the basic ground for economic expansion. With the privileges they get from the central bank and through retail banking, banks are able to create money out of nothing.* Ali Qadri in "International Financial Institutions, Indebtedness, and War: An Interview with Ali Al-Qadri."

³⁹ الغذاء والسوق: في ضرورة تحرير القمح من الاقتصاد الحر. محمد سليم بن يوسف، Inhiyez Website.

Secondly, the debts of all small farmers should be cleared because they are the pillar of the desired food sovereignty. Another party that we sometimes miss can intervene: the central bank can buy all the farmers' debt titles without this having any impact either on its budget - since it is sovereign in the creation of money - or on inflation rates, as critical monetary economists fear, since inflation is mostly imported and the State is now experiencing a liquidity shortage, not the reverse.⁴⁰ This is not possible today in a legal system that gives the central bank total independence from the State, but total subservience to the interests of banks and international financial institutions. The central bank is primarily responsible for the implementation of the budget contraction policy by preventing the provision of loans. Monetary sovereignty - that is, sovereignty over the central bank - must be restored and freed from financial interests. In the same vein, the central bank can require banks to grant soft loans to small farmers without the guarantees required by banking bureaucracy: the guarantee of the central bank shall suffice.

The debts of the various public institutions entrusted with feeding all Tunisians, namely the Cereals Agency, Oil Agency and the Trade Agency, must also be cleared so that they can urgently fulfill their tasks of supplying food through the global market. Short-term procurement is inevitable in the current situation resulting from previous agricultural policies. This action is essential and must be carried out by the central bank. The first reason for the financial crisis of these agencies is the non-payment by the State of the due subsidies, but another important reason is the result of the Central Bank's policies in bringing down the value of the dinar, which has exacerbated the amounts of these agencies' debts in hard currency.

The above are urgent policies. But the solutions cannot, of course, be purely financial/monetary. What we are experiencing today is mainly due to the connected agricultural policies adopted by the State - policies that have placed exports at the top of priority lists and made of the market the prevailing logic. This extractive model, in which citrus fruits absorb a third of surface water resources, while cereal crops remain at the mercy of rainfall, are out of the question. This is a model in which extensive palm farming for the production of Deglet Ennour - intended for export - predominates, leading to the depletion of groundwater resources in the oases, along with the destruction of traditional agricultural models. On the other hand, it is out of question that the market remains in control of our food, as is the case today in the fodder sector, where some barons hold control over the destinies of livestock farmers without even considering ways to produce local types of fodder suited to the nature of the Tunisian soil and climate. Finally, and in the first place, the land must not belong to investors who are plundering it⁴¹ and exploiting it for export products to the detriment of water resources, ecological balance and people's food, the land must rather be given back to farmers.

These measures require a political will to break with the austerity and reform system and to treat food as a commodity like any other. Therefore, these are all policies that require a break with the colonial system, which the countries of the South are subjected to.

Walid Besbes - researcher in economics - Tunisia

Email: besbes.welid@gmail.com

.. Inhiyez Website نحو السيادة الغذائية: أية حلول آنية وأي مكان للسيادة النقدية. وليد بسباس

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41 See examples of Eetizez Farms 2 and 3 in Menzel of Bouziane (our food, our farming, our sovereignty...)

How did the war affect Egypt's food?

Russia's invasion of its neighbouring country Ukraine has not only had a devastating impact on life in Ukraine, but has extended to a shortage of energy supplies throughout Europe, driving the global economy towards the risk of recession,¹ at a time when countries around the world were already struggling to recover and restore their economies two years after the spread of the Corona virus pandemic.

Southern countries have had their own share of the war's effects as well, when it comes to their food security. Egypt is considered as one of the most damaged countries by the war, despite its geographical distance, given the impact it had on its food security, or what remains of it, following decades of decay since the end of the last century, due to its tendency to liberalize agriculture and food sector, replacing it with the private sector, in the midst of its quest for integration into the global neoliberal order.

How has the war reached Egyptians' food supply?

The war in Ukraine brought a new threat to what was left of Egypt's food security, with the U.N. Food and Agriculture Organization² (FAO) warning that about 9.6 per cent of Egypt's population, or more than 10 million people, were at risk of not being able to afford healthy food if their purchasing power decreases by about a third, either due to high food prices or due to a decline in people's incomes, at a time when 85.3 percent of the population was already unable to afford healthy food, according to the FAO's 2019 data.

The war's heavy impact on Egypt's food security has revealed the extent to which such security is fragile. For decades after the 1973 war, Egypt has rapidly moved towards integration into the global neoliberal order, liberalizing its economic policies one after the other. Progressively, Egypt has gone from being a food producer to one of the world's major importers of basic food products and seeds for agriculture.

Decades of policies towards integrating the global system

In the 1980s, an American presidential mission visited Egypt³ to examine what it described as Egypt's agricultural problems, and then to provide solutions and recommendations for these problems as a requirement for American aid, including the associated conditions and diktats, such as importing American machinery and agricultural products into Egypt. At the

1 <https://reut.rs/3UOd4sB>

2 <https://reut.rs/3Ejtjqy>

3 <https://bit.ly/3tHZU4w>

same time, this assistance has sought to curtail the cultivation of strategic crops, such as wheat and cotton, in exchange for obtaining them as aid.

Furthermore, the government encouraged farmers to grow export-oriented varieties of vegetables and fruits in order to get hard currency. This required obtaining the necessary seeds for the crop from international companies that acquired the seeds' property rights since Egypt signed⁴ the International Convention for the Protection of New Varieties of Plants (UPOV).

However, this Convention does not protect small farmers, but instead is designed to protect plant species developed by international companies, and entitles them to take legal action against farmers if they use these varieties without acquiring the right to reproduce or cultivate them. This obviously means that this protection has turned into a monopoly for these companies and their importing agents, particularly in light of the decrease in funding for Egyptian agricultural research centers, which has made it impossible for them to produce new varieties of their own seeds, thereby undermining Egypt's ability to achieve food sovereignty.

The return of capitalism in the farming sector

This occurred at a time when⁵ the law reforming the relationship between landlords and tenants was issued, allowing the liberalization of farmland rental prices, which have in turn increased significantly and became unaffordable for a large proportion of small farmers.

This resulted in hundreds of thousands of people moving from being tenants on large landowners' farms to being paid workers on the same farms, or giving up the farming profession. In addition, the government has extended the development of desert lands through various projects. However, in pursuit of rapid development, it has tended to sell or lease these newly developed lands to large⁶ Egyptian and foreign companies and investors. This has resulted in increased control of the farming sector by the larger economic entities, and a tendency to grow products for export, such as vegetables and fruits that are highly priced for most of the Egyptian social segments, which means that the arable land in Egypt has become land used to serve consumers in the global North. On the other side, the importance of small farmers has decreased, and the competition between the two sides has become more intense, to the advantage of companies, of course, especially with the diminished role of agricultural cooperatives.

The fragility of this system has become evident throughout this period, as the government relied on imports of strategic food commodities from abroad, making its ability to supply

4 https://jipim.journals.ekb.eg/article_231022.html

5 <https://bit.ly/3GrR1DD>

6 <https://bit.ly/3V2z0Ve>

these commodities at the mercy of fluctuating prices in the event of a sudden change in the global economy. With the 2008 economic crisis, the government was unable to supply the wheat needed to make the subsidized bread that most citizens depended on, and long lines of people stood in front of bakeries across Egypt to fight for sustenance (i.e., bread), sometimes resulting in fights that ended in killings⁷ amongst those waiting in the line.

Wheat... The greatest loser

In recent years, the Corona virus pandemic has hit the global supply chains and the economies of Egypt and the rest of the world. Governments began to get the economic situation under control early this year, but new hardships suddenly emerged, either due to the direct effects of the war in Ukraine and its impact on the prices of imported food commodities such as wheat, or indirectly after the Egyptian economy found itself in a severe hard currency shortage crisis, which limited its ability to provide the dollars needed for imports, with important food sectors on the verge of collapse, including the feed and protein industry.

Given its highest importance in the Egyptian food basket and its greatest impact on Egypt's food security, wheat was naturally the first priority during the war.

Bread has occupied a special position and absolute importance for Egyptians since the time of Pharaohs, starting from its ancient sanctification, and lasting for thousands of years, due to its nutritional value and ease of access in the current era. For decades, wheat remained the only crop that the government kept supporting in all of its forms, starting with providing the necessary seeds for its planting at the beginning of the season, providing subsidized fertilizers for its cultivation - despite continuously increasing its prices - buying it from farmers at higher prices than its world counterparts, and then milling it and turning it into flour to be sold in bakeries at a subsidized price to Egyptian consumers. Since the subsidies introduced in the aftermath of World War II, bread prices have only increased three times, as successive governments have avoided altering bread prices to maintain a solid political system.

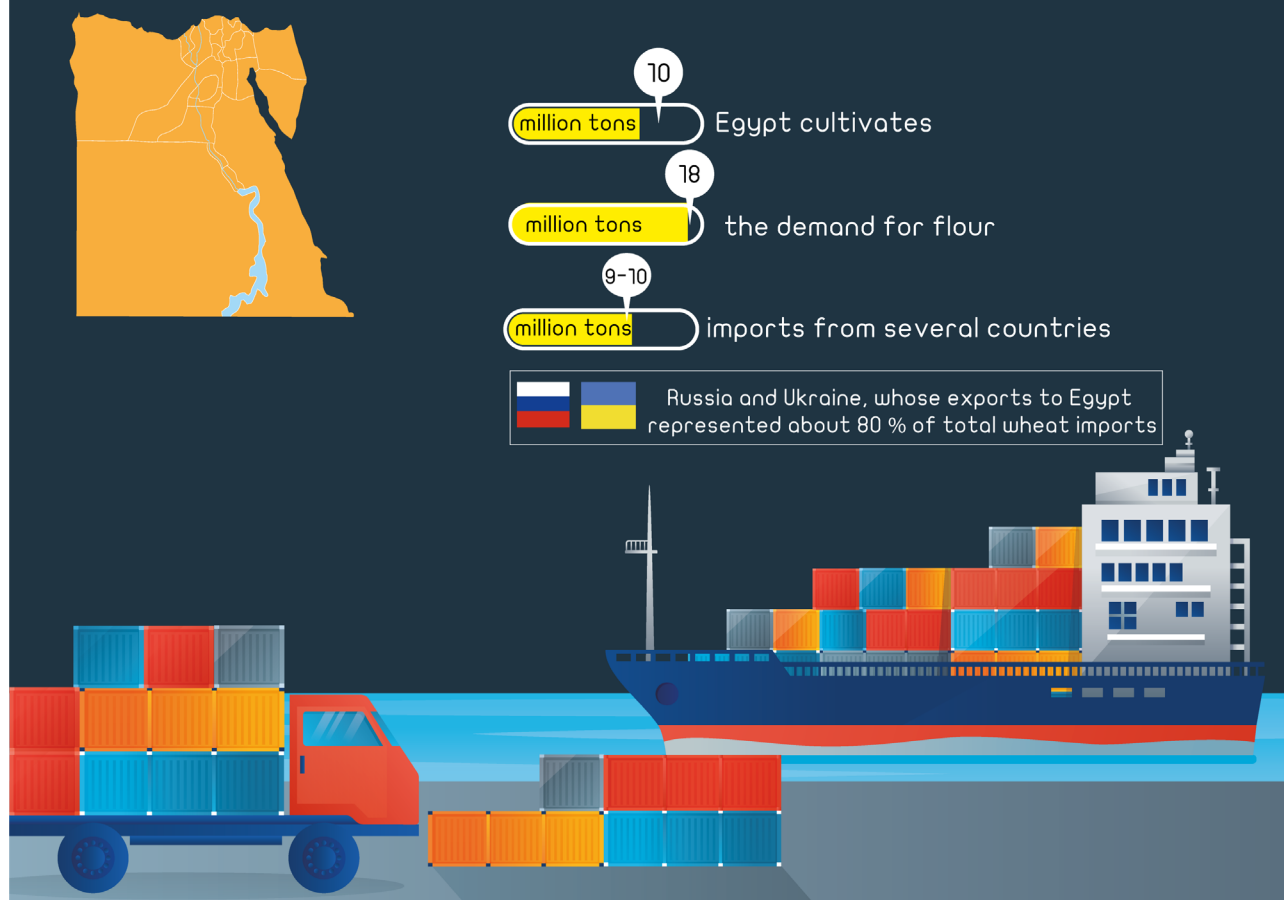
To meet the need for wheat to produce bread, the Egyptian government estimates that the country needs to grow about 10 million tons of wheat. These estimates are questionable, considering that the data used is outdated, besides experts' opinions on the evolution of the agricultural area and the actual crop production in Egypt. In any case, this production is not sufficient to cover the demand for flour, which amounts to 18 million tons. The gap (about 9-10 million tons) is compensated by imports⁸ from several countries, primarily Russia and Ukraine, whose exports to Egypt represented⁹ about 80% of total wheat imports last year.

7 <https://elbashayer.com/19391/10846/>

8 <https://www.almasryalyoum.com/news/details/2328789>

9 <https://bit.ly/3XhOPED>

Wheat: weak local production and dependence on the global market



The outbreak of the war in February disrupted Russian and Ukrainian wheat supplies, resulting in a gradual increase in world wheat prices over the months following the start of the war, reaching an estimated increase of 48% compared to last year.

The government's attempts to contain wheat prices

In an attempt to address the crisis, the General Authority For Supply Commodities, the government's wheat procurement agency, initially issued successive tenders to import wheat. But in the process, it was forced to cancel several tenders, either because of a lack of bidders or because of price increases compared to the pre-war period. As a result, the government changed its plan and decided, for the first time, to reduce its dependence on imported wheat and rely on the local one, by buying twice as much from farmers, estimated at six million tons, which is equivalent to 60 percent of the government's total planned domestic production, and the remaining needs (three million tons) will be ensured through imports.

However, the government feared that wheat would be sold to the private sector, which could offer a higher price than the government's counterpart. Instead of raising the price to ensure

their local needs were imported, the government issued a decree¹⁰ whereby farmers were under obligation to sell part of their production to the government.

This is when the problem emerged

In an effort to ensure a minimum level of food security, the government encourages farmers to grow wheat, and prohibits its export and sale to the private sector. After the harvest, the government buys about three and a half million tons of wheat from farmers at a price it sets before the season, which is higher than the world market price. The remaining wheat is kept by farmers for domestic use and some is sold to the private sector, although this is legally prohibited.

But then the war had changed everything. International wheat prices continued to rise, even exceeding the price set by the government to buy wheat from farmers, along with rising prices for fodder, flour, and commodities, causing farmers to refuse to sell to the government despite the government's binding decision.

The government increased the import incentive to encourage farmers. However, the incentive was not sufficient, even after the price increase, for farmers to give up their wheat, which they considered to be a guarantee of their food security in circumstances that were new to them. Following this incentive, the government neither listened nor responded to farmers' repeated requests to increase the import price, given the high inflation rate both in urban and rural Egypt, especially with the General Authority still importing at the same international prices and wasting hard currency, despite the availability of wheat locally.

Looking outside, rather than solving inside

In the midst of the crisis, the Egyptian Ministry of Supply has sought to take action by allowing the import of wheat from alternative sources, in an effort to move away from the unstable Black Sea region and avoid the high prices of American and French wheat. One of these alternatives was India. Unfortunately, after Egypt contracted its first shipment, India soon banned wheat exports as a result of high inflation rates in the country along with a heat wave that damaged the crop. Egypt therefore did not import any quantity.

Amidst the deteriorating circumstances and Egypt's continued cancellation of international tenders due to prices, the government has decided to get tough on farmers and issued another decision punishing farmers who refrain from selling their wheat to the government with penalties up to imprisonment, for the first time in its history. Yet, despite these legal restrictions and continuing censorship campaigns, the government was only able to collect

¹⁰ <https://bit.ly/3hNZt5T>

about 3.8 million tons of wheat despite official claims¹¹ of 4.2 million tons.

The Ministry of Supply, with a view to preserving and expanding its strategic wheat stocks, decided to reduce flour consumption rates by increasing flour extraction rates¹² in subsidized bread to 87.5 percent instead of 82 percent. In addition, because of the limited choices, Egypt abandoned one of the quality requirements for imported wheat and increased the allowable moisture¹³ content of wheat. It eventually thought of producing bread from potatoes¹⁴ to save wheat. But the idea failed after the ministry discovered that the idea wasn't practical¹⁵ at the time being.

Outside the subsidized bread system, and to prevent the threat of rising prices that could lead to social unrest, the government has set a mandatory price for bread sold outside the subsidized system, with the government providing its producers with flour at a price below the market price.

The plan has been appreciated, and the government has flooded the media with coverage of its plan, and has imposed severe penalties on offenders.¹⁶ However, in reality, the government did not give¹⁷ any flour to bakeries, forcing them to buy flour at a high price on the free market, and to sell bread at lower prices than the cost price, out of fear of being fined, causing many bakeries to close down out of concern for losses. Three months later, the government cancelled this initiative - which has never been implemented - and the price of unregulated bread has risen again.

Increased wheat prices in the post-war period cost Egypt¹⁸ about 15 additional billion pounds in the current fiscal year, all of which was borne by the government, whether using its own resources or by borrowing.

Although the government has not burdened consumers with this price gap, considering the priority of bread and the sensitive nature of its prices, it has increased the prices of eight food products since the beginning of the year. In the second half of the year, it decided to compensate the Egyptian people eligible to receive aid with an exceptional increase¹⁹ in the amount of the allowance for six months since last September. But the prices of basic food commodities continued to rise even after the exceptional allowance, thereby reducing its effective amount.

11 <https://bit.ly/3Xf1xUU>

12 <https://bit.ly/3giBQsS>

13 <https://bit.ly/3UTgwIF>

14 <https://bit.ly/3OfgJNC>

15 <https://www.madamasr.com>

16 <https://www.elwatannews.com/news/details/6005536>

17 <https://bit.ly/3hRcoUD>

18 <https://bit.ly/3EJDeqK>

19 <https://bit.ly/3V6UDyX>

In any case, neither wheat nor bread were the only products affected by the war; they were but more significantly impacted.

The war effects go beyond wheat

The impact of the war has reached another component of the Egyptian food chain, which is rice. Egypt has already achieved a high level of self-sufficiency and significant sovereignty over its production, but government policies have not helped to sustain the country's food security, resulting in high rice prices and shortages in the market.

The crisis of high rice prices is due to the government's attempt to buy local rice at prices that are unfair to farmers, and to increase market control by setting a mandatory price for the sale of rice to compel farmers to supply rice at the same price. This decision is intended to prevent prices from rising, especially given the spread of monopolistic practices in most food sectors, but at the same time these policies encourage farmers to refrain from growing strategic materials for fear of cheap government procurement. This is especially true given that production inputs are high, even the subsidized ones,²⁰ and that irrigation costs are also high.

In addition to cereals and rice, Egypt is facing a new protein crisis.

Russia and Ukraine together produce about one-fifth of the world's maize, of which Egypt imports more than 800,000 tons a month to make fodder. With the shortage of dollars in the local market, importers have not been able to bring the feed into the country.²¹ And what they have been able to bring into the country has escalated in price²² to unprecedented levels. As thousands of tons of feed ingredients piled up at Egyptian ports, prices for poultry and eggs soared, with feed costs alone accounting for about 75% of the poultry industry's costs.

The decline in the availability of foreign currency is a direct result of the loss of billions of dollars in the Egyptian economy since the start of the war in Ukraine. In just a few weeks, the Egyptian economy has lost 20 billion dollars²³ in hot money.

In spite of this, the central bank kept supporting the value of the Egyptian pound against the dollar, based on an increase in foreign currency sources. However, this was countered by a significant increase in import bills within rising global prices and the withdrawal of foreign investment, which put the Egyptian pound and economy under increased pressure. As a result, the Central Bank and the government took several decisions in the first quarter of

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21 <https://bit.ly/3EJcgQc>

22 <https://bit.ly/3XdvXqt>

23 https://www.youtube.com/watch?v=tydogHGxN6s&ab_channel=TeNTV

this year to significantly and abruptly restrict most imports, including imports of seeds, crop seeds, and production inputs needed by the industry, which includes products imported by Egypt for its feed industry, such as yellow corn and soybeans.

The crisis gradually worsened and the government lost the ability to provide foreign exchange to allow the entry of shipments of various imported goods, including feed ingredients. The crisis exploded after the appearance of videos²⁴ showing poultry producers slaughtering young birds called “katakit” after failing to provide poultry feed, meanwhile an informal parallel market²⁵ for feed emerged with unprecedented prices in Egypt. Instead of supporting the poultry sector, one of the few sectors in which Egypt has been self-sufficient for years, the government decided to put pressure on feed manufacturers and poultry farms; it used some of its scarce hard currency, not to provide feed and preserve the most important protein sources in the Egyptian food basket, but rather to import frozen poultry from abroad, without giving any explanation neither to citizens nor to the private sector.

Private sector flour mills have also been affected, with 80%²⁶ of them ceasing to operate, as the inflow of imported wheat on which they completely depend has stopped, which has led to a significant reduction in the production of bran used by small farmers for animal feed.

What does the future hold for the Egyptian food system?

With the deepening foreign exchange crisis, the government has gone for new concessions and started selling off assets²⁷ it holds in some important food production sectors, notably fertilizers.

The concern is the extent to which the private sector could be involved in the management of such an important industry, as the private sector is driven by profit without any other considerations. This could change the strategies of fertilizer companies, which are getting natural gas from the government at a subsidized price in exchange for allocating part of their production to the local market at a subsidized price, to help the Egyptian agricultural sector develop.

Fertilizer subsidy strategies have not changed yet, but the government, after selling part of its shares in these companies,²⁸ has decided to increase the natural gas prices sold to nitrogen fertilizer plants, which is expected to increase local prices by about 33%, and may subsequently result in a shortage of fertilizers at the beginning of the winter season.

24 <https://bit.ly/3Aq0BDf>

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26 <https://bit.ly/3Gt8kV0>

27 <https://bit.ly/3TMFVfq>

28 <https://bit.ly/3GtNSDk>

What's even worse is that the biggest impact of this decision to increase gas prices, and thus fertilizer prices, will be felt by small farmers, as they primarily rely on nitrogen fertilizer, whereas large agricultural investment companies tend to use specialized fertilizers.

Besides fertilizers, the Egyptian government was forced to acquiesce to repeated global demands to withdraw from multiple economic sectors in the process of seeking a new loan from the International Monetary Fund. It subsequently announced what it called the State Ownership Document,²⁹ in which it outlined its strategy to withdraw from certain sectors within three years, including livestock, fish farming and cereals, with the exception of wheat, and to later reduce its investments in the dairy sector.

Reducing state presence for foreign investment

The government's State Ownership Document is one of the most important pillars of the negotiations with the International Monetary Fund (IMF) for the new, as yet unannounced loan. In addition to withdrawing from certain sectors, statements by government officials indicate their intention to pursue austerity policies that include restructuring commodity subsidy systems for the most vulnerable segments, in light of the crisis that subsidies have posed to successive governments - a significant burden on their public budgets, which has often led them to borrow instead of investing in Egypt's vital sectors to strengthen the country's food security and sovereignty.

The major challenge in getting a new loan lies in its neoliberal conditions, which lead to greater dependence on world markets and the global economic system, which means ignoring the importance of Egypt's food security to provide safe, healthy, adequate and appropriate food for the entire population, and to eliminate some of the health problems, food-borne diseases, malnutrition, growth retardation and obesity that affect three out of four children in Egypt.

Eliminating subsidies does not provide the best way to redistribute government resources. On the contrary, research³⁰ suggests that comprehensive policies, including subsidy systems, may be the best solution.

Research³¹ confirms that the solution lies in adjusting the initial distribution of resources by increasing the minimum wage, by including all segments of the population, by generalizing the social protection system and extending its services, and by adopting a fair tax system that distributes the burden according to real wealth and ensures its redistribution in favour of the most disadvantaged. Indeed, this goal can be achieved through support to the poorest segments of society, including farmers, in order to encourage small-scale farming as an

29 <https://bit.ly/3OfPMJD>

30 https://archive.unescwa.org/file/110178/download?token=FMPir_n9

31 https://archive.unescwa.org/file/110178/download?token=FMPir_n9

effective means of ensuring food security.

There might be more support... but the support offered to farmers is disappearing

One of the most important foundations of farmer support that is lacking is the provision of technical and extension support and training to small farmers who cannot afford to hire an agricultural expert to deal with the impacts of climate change they are not accustomed to. This has now become impossible after the number of agricultural extension workers of the Ministry of Agriculture in Egypt has decreased³² by 99.7%. On the other hand, the priority of preserving and developing domestic seeds requires increasing the budget of agricultural research centres, which have been neglected and underfunded dramatically, as well as reformulating Egypt's participation in the UPOV agreement, in order to allow small farmers to benefit from higher productivity seeds in order to enhance Egyptians' food security.

To do so, it is necessary to address the deteriorating economic situation of farmers, to protect small farmers and help them cope with such shocks, and to encourage them to engage in farming by offering them fair indicative prices before the agricultural season and providing them with production inputs at a reasonable price.

Furthermore, the government has not yet activated the Agricultural Solidarity Fund that it established years ago to compensate farmers in the event of losses and disasters, now becoming important, to enable farmers to withstand the huge crop losses, which are repeatedly occurring due to climate change and extreme weather variability.

The liberal policies followed continuously over the past three decades in Egypt have been reflected in the transformation of agriculture into a sector that serves large land owners and corporations, while the role of the small farmer in this system has been diminished, or there have been attempts to control it to serve policies whose objective is to stimulate exports. Such policies have plunged small farmers into extreme poverty, which is accumulating as agricultural yields are declining year by year, threatening the agricultural profession and its future in Egypt.

Nada Arafat, Journalist / Egypt

Email: Nadaarafat00@gmail.com

³² <https://www.vetogate.com/2200883>

Although we have not yet reached the level of famine in our region, it is clear that the high prices of foodstuffs and food production inputs and the decline in purchasing power can lead to malnutrition along with its health and social consequences for some of the region's populations.

It is therefore necessary for the people affected to get organized to create a sovereign social resistance fighting for the realization of a food sovereignty project based on agro-ecological practices, which would ultimately protect them from the frequent food crises resulting from dependency on imports and vulnerability to climate change and price fluctuations.

This Special issue sheds light on the impact of the Russian invasion of Ukraine on food supply in North African countries. Given the different effects of war on North African countries, this Special issue will address the impact of war on four countries in the region: Algeria, Tunisia, Egypt and Morocco.



The North African Network for Food Sovereignty is a unifying structure for struggles in the region and will be involved in local continental and international mobilisations.

