



GIEWS Country Brief The Republic of Tunisia

Reference Date: 30-May-2024

FOOD SECURITY SNAPSHOT

- Production of winter crops estimated at near-average level
- Cereal imports in 2023/24 marketing higher than five-year average
- Food inflation rate decreased since beginning of year reaching lowest level in April 2024

Rainfall improved conditions of 2024 crops in northern regions

Crops are to be harvested and production of 2024 cereal crops is expected at near the five-year average level. Output recovered compared to the last drought-affect production.

Limited rainfall and above-average temperatures delayed planting of 2024 winter grains. Four consecutive years of drought have weakened the seed production system and the 2022/23 harvest of durum wheat was not sufficient to guarantee seeds for the 2023/24 campaign. As a consequence, the government increased imports of wheat seed, while some farmers decided to shift to barley production.

As cereal cultivation is mostly rainfed, crop production may vary significantly year-on-year. At the beginning of the current season, dry conditions raised concerns on crop yields. Rainfall amounts increased between December 2023 and February 2024, replenishing soil moisture in most areas of the country, except in southern areas. Favourable weather conditions in April have enhanced vegetation growth in most cereal-producing areas in northern regions which account for almost 60 percent of the national wheat production. Crops recovered also in central regions and a bumper output is expected in Kairouan Region contributing to about 7 percent to the national wheat production. In southern regions, erratic distribution of rains and higher-than-average temperatures throughout the season have negatively affected crops and production prospects are unfavourable.

Widespread drought caused crop failures in 2023

Despite recurring droughts, the country aims to increase self-sufficiency in cereal production. In 2023, above-average temperatures and severe drought conditions constrained crop development, leading to widespread crop failures.

Tunisia

Crop Calendar

(*major foodcrop)

Barley

Potatoes*

Wheat*



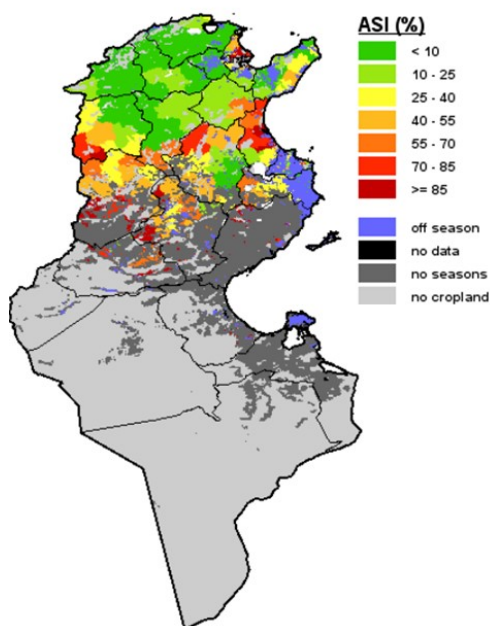
Sowing

Growing

Harvesting

Tunisia - Agricultural Stress Index (ASI)

from start of season 1 to dekad 3, April 2024



The aggregate 2023 cereal output, mainly wheat, is estimated at 520 000 tonnes, about 70 percent below the five-year average.

Cereal imports to increase in 2023/24 marketing year

The country relies heavily on grain imports, even in years with good domestic production, and cereals constitute the largest share of the value of imports.

Imports cover more than half of the country's cereal consumption needs. Cereal imports in the 2023/24 marketing year (July/June) are forecast at 4 million tonnes and above the five-year average. Wheat, a key staple and source of nutrition in the country, represents about half of the cereal imports. Durum wheat for couscous and pasta, and soft wheat for bread, represent the main components of the local diet and account for around 45 percent of the food calorie intake.

In the period between July 2023 and May 2024, the Russian Federation and Ukraine supplied about half of the wheat imports to the country, while about 30 percent was supplied by Bulgaria and Turkey. Recent trade liberalization reforms allow private companies to directly import barley instead of purchasing it from the *Office des Céréales*, a company owned by the state which has control over grain trade.

Food price inflation ease in 2024 at expenses of increased budget burden

In spite of the country's high import dependency rate, changes in international prices of wheat and vegetable oil are not fully transmitted into domestic markets as the government's universal food subsidy programme stabilizes the local prices. However, the rise of international food prices translated into increased value of subsidies leading to public debt growth and reduced the country's import capacity, causing shortages of basic food products such as wheat, coffee, tea and vegetable oils. In recent years, the below-average cereal production has contributed to worsen the situation.

Although food inflation rate eased in 2024, it remained at high levels. Food prices were 9.2 percent higher year-on-year in April 2024, mainly driven by an increase of prices of coffee: 35 percent, sheep meat: 26 percent, edible oils: 21 percent, condiments: 17 percent, beef meat: 14.3 percent and fresh fish: 12 percent.

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This brief was prepared using the following data/tools:

FAO/GIEWS Country Cereal Balance Sheet (CCBS) <https://www.fao.org/giews/data-tools/en/>.

FAO/GIEWS Food Price Monitoring and Analysis (FPMA) Tool <https://fpma.fao.org/>.

FAO/GIEWS Earth Observation for Crop Monitoring <https://www.fao.org/giews/earthobservation/>.

Integrated Food Security Phase Classification (IPC) <https://www.ipcinfo.org/>.

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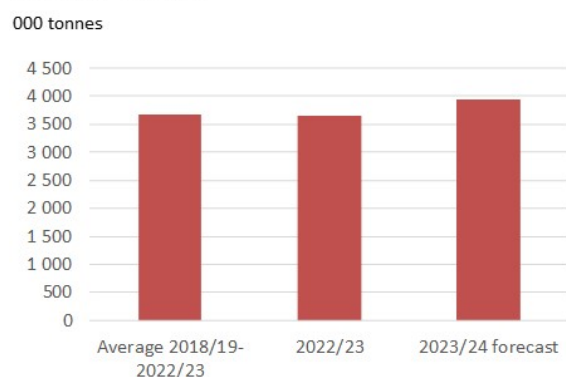
Cereal Production

	2018-2022 average	2022	2023 estimate	change 2023/2022
	000 tonnes			percent
Wheat	1 180	1 135	400	-64.8
Barley	529	521	89	-82.9
Cereals NES	29	32	28	-12.5
Others	3	3	3	0.0
Total	1 741	1 691	520	-69.2

Note: Percentage change calculated from unrounded data.

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Cereals Imports



Note: Includes rice in milled terms. Split years refer to individual crop marketing years (for rice, calendar year of second year shown).