



GIEWS Country Brief The Republic of Tunisia

Reference Date: 29-November-2023

FOOD SECURITY SNAPSHOT

- Dry weather conditions delay planting of 2024 winter grain crops
- Widespread drought-induced crop failures constrained cereal production in 2023
- Cereal import requirements forecast to increase in 2023/24 marketing year
- Despite some easing, overall food price inflation remains high

Dry weather conditions delay planting of 2024 winter grain crops

Sowing of winter wheat and coarse grain crops usually starts in late October and continues until the end of the year, depending on soil moisture availability following the onset of seasonal rainfall in September. As of late November 2023, cumulative seasonal rainfall remained well below average: in September 2023, rainfall amounts in the cropping areas corresponded to about the one-quarter of the long-term average and, in October 2023, to just about one-third of the average. The final outturn of 2024 cereal crops, to be harvested next May/June, will depend on weather conditions during the rest of the season. Current weather forecasts indicate a high probability of near-average precipitation between November 2023 and April 2024.

Widespread drought-induced crop failures constrained cereal production in 2023

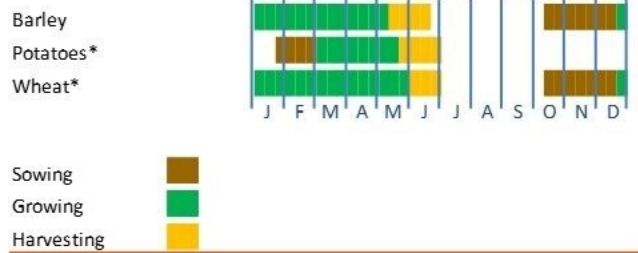
Cereal cultivation is mostly rainfed, resulting in significant year-on-year variations. The irrigated wheat area represents less than 15 percent of the total wheat planted area. Compared to the previous year, wheat plantings in 2023 increased by 7 percent as some farmers decided to shift from barley to wheat due to more attractive wheat prices. Despite favourable rains at planting time, rainfall was erratic and insufficient for the rest of the season in in-land areas. Coupled with above-average temperatures during the critical crop development stages, severe drought conditions, not experienced in the country for over two decades, constrained crop development, leading to widespread crop failures. Consequently, 2023 cereal output was estimated at 302 000 tonnes, almost 80 percent below the average.

Despite recurring droughts in the past years, the country still aims to increase self-sufficiency in cereal production. Policy

Tunisia

Crop Calendar

(*major foodcrop)



Tunisia

Cereal Production

	2018-2022 average	2022	2023 forecast	change 2023/2022
	000 tonnes			percent
Wheat	1 203	1 252	270	-78.4
Barley	529	520	1	-99.8
Cereals NES	29	32	28	-12.5
Others	3	3	3	0.0
Total	1 764	1 807	302	-83.3

Note: Percentage change calculated from unrounded data.

instruments used by the government include, guaranteed farmgate prices, subsidized certified seeds, an irrigation water subsidy as well as the provision of technical assistance to farmers producing wheat on irrigated areas.

In 2023, the guaranteed farmgate prices of durum wheat increased to TDD 1 300 (USD 436), up from TDD 1 000/tonne (USD 339). The guaranteed farmgate prices of soft (common) wheat increased from TDD 800 (USD 271) to TDD 1 000/tonne (USD 336) and those of barley from TDD 690 (USD 233) to TDD 800 (USD 267). In 2023, the government purchased 225 600 tonnes of grains, compared to 700 000 tonnes in 2022.

Cereal imports to increase in 2023/24 marketing year

The country relies heavily on grain imports, even in years with good domestic production. Cereal import requirements in the 2023/24 marketing year (July/June) are forecast at 4.7 million tonnes, about 30 percent above the average import requirements of the previous year. More than half of the imported cereals is wheat.

Between 2016 and 2020, the country sourced almost 40 percent of its wheat imports from Ukraine, 7 percent from the Russian Federation and the rest from various European Union countries. In 2022/23 marketing year, following the start of the war in Ukraine in February 2022, the share of Ukrainian exports on total wheat imports declined to slightly over 15 percent. Although Black Sea countries still supplied most of the imported wheat, shipments from Canada in 2022/23 have increased and accounted for almost 20 percent of total wheat imports.

Compared to 2022, average cereal import prices in 2023 (up to September 2023) declined by 25 percent for durum wheat, 22 percent for soft (milling) wheat and 22 percent for barley.

Despite some easing, overall food price inflation remains high

The economic growth has remained stagnant despite resurgence of tourism following the COVID-19 pandemic. In 2023, the Gross domestic product (GDP) growth was forecast to be around 1.2 percent, about half of the 2022 growth rate, curtailed by drought, external financing challenges and increasing debt repayment obligations. As some constraints are likely to ease, the 2024 GDP growth is forecast of 3 percent.

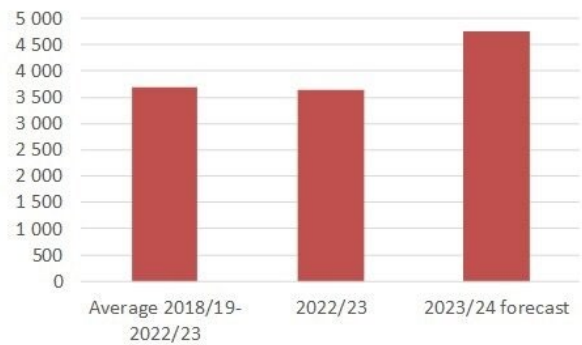
Unemployment increased from 15.3 percent in 2022 to 15.6 percent in 2023, driven mostly by limited job opportunities in the drought-stricken agricultural sector. Unemployment remains particularly high at about 40 percent among young people (aged 15-24).

In spite of the country's high import dependency rate, changes in international prices of wheat products and vegetable oil are not fully transmitted into domestic prices as the government's universal food subsidy programme keeps them stable. There have been discussions about reforming the subsidy system, which puts a significant burden on the national budget, but the implementation has been postponed so far. Tight external financing conditions constrained the availability of foreign currency to finance imports, resulting in reported shortages of basic products despite easing of international food commodity prices.

Tunisia

Cereals Imports

000 tonnes



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

The general Consumer Price Index in October 2023 increased by 8.6 percent on a year-on-year basis, decreasing for the eighth straight month from the record high level of 10.4 percent registered in February 2023. The year-on-year food price inflation declined from the peak of 15.9 percent reached in May 2023 to 13.1 percent in October 2023. The main price increases in October 2023 were for coffee (+35 percent), sheep meat (+30 percent), edible oils (+28 percent) and eggs (+20 percent).

Talks with the International Monetary Fund (IMF) for a bailout package are ongoing, amidst balance of payments problems.

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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/>



GIEWS Country Brief Tunisia

Reference Date: 27-July-2022

FOOD SECURITY SNAPSHOT

- Near-average cereal production harvested in 2022
- Cereal import requirements forecast to increase slightly in 2022/23 marketing year
- Sluggish economic growth and increases in food price inflation

Near-average cereal production harvested in 2022

Harvesting of the 2022 winter cereals is about to conclude. Although weather conditions for sowing were favourable, the area planted decreased compared to the previous year as high fertilizer prices and general economic uncertainty constrained plantings. The area sown with the 2022 wheat crop decreased to 579 000 hectares, down from 607 000 hectares in the previous year, and the area with barley declined from 510 000 to 430 000 hectares.

Following a good start of the rainy season, cumulative rainfall amounts between November 2021 and February 2022 were about half the average, causing widespread drought conditions in the central part of the country. In March and April, abundant rainfall amounts, up to 40 percent above the average in some areas, during the crucial grain filling stage, benefited crop recovery in the main cereal producing areas, with the exception of the eastern governorates of Souse, Monastir and Mahdia.

Despite decreases in the sown area, the 2022 cereal production is estimated at a close-to-average level of 1.8 million tonnes, about 9 percent above the 2021 harvest on account of relatively favourable weather conditions. Domestic crop production varies markedly from year-to-year due to significant rainfall variations. The irrigated wheat area represents less than 15 percent of the total wheat planted area.

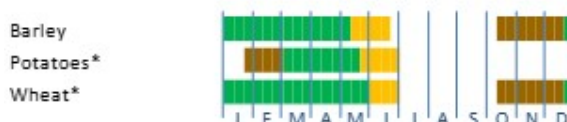
The country aims to reach an annual domestic production of 3 million tonnes of cereals to achieve self-sufficiency. Policy instruments used by the government include guaranteed farmgate prices, subsidized certified seeds, an irrigation water subsidy as well as the provision of technical assistance to farmers producing wheat on irrigated areas.

In 2022, the guaranteed farmgate prices of durum wheat increased to TDD 900 (USD 300 using the exchange rate of TDD 3.1 for USD 1 applied in May 2022), up from TDD 620/tonne

Tunisia

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Tunisia

Cereal Production

	2017-2021 average	2021	2022 forecast	change 2022/2021
	000 tonnes			percent
Wheat	1 172	1 190	1 252	5.2
Barley	520	430	520	20.9
Cereals NES	29	30	32	6.7
Others	3	3	3	0.0
Total	1 724	1 653	1 807	9.3

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

(USD 225, using an exchange rate of TDD 2.7 for USD 1 applied in May 2021). The guaranteed farmgate prices of soft (common) wheat increased from TDD 500 to TDD 700/tonne and those of barley from TDD 410 to TDD 550. In 2022, the government purchased 700 000 tonnes of grains, compared to 808 000 tonnes in 2021.

The country is still among the most important world phosphate producers despite gaps in production due to general strikes between November 2020 and May 2021, temporarily closing the chemical fertilizer plant in Gafsa Governorate. Already at the end of October 2020, before international fertilizer prices started to surge, domestic fertilizer prices increased by 30-50 percent, with additional increases of up to 40 percent during the 2021/22 cropping season. In the first quarter of 2022, the country's phosphate production doubled to 1.3 million tonnes compared to the same period in 2021. Responding to high international prices in 2022, phosphate exports resumed after 11 years, with more than 300 000 tonnes expected to be shipped in 2022.

Cereal imports to increase in 2022/23 marketing year

The country relies heavily on grain imports, even in years with good production. Cereal import requirements in the 2022/23 marketing year (July/June) are forecast at a slightly above-average level of about 3.8 million tonnes, about 5 percent above the import requirements of the previous year. More than half of the imported cereals is wheat. Between 2016 and 2020, the country sourced almost 40 percent of its wheat imports from Ukraine, 7 percent from the Russian Federation and the rest from various European Union countries. Almost 60 percent of total maize imports of 900 000 tonnes originated from Ukraine.

According to the National Observatory of Agriculture (Onagri), the food trade balance almost doubled in the past 12 months, posting a deficit of TDD 1 559.7 million in June 2022, against TDD 806.9 million during the same period in 2021. The increase in the deficit was driven by increases in the value of cereal imports (+48.6 percent), sugar (+141 percent) and vegetable oils (+70.1 percent), despite the increase in the value of exports of olive oil (+34 percent). In 2022, the average import prices of durum wheat so far reached USD 665/tonne, up from USD 435 in 2021 and USD 327 in 2020. Likewise, import prices paid for 1 tonne of soft (common) wheat increased from USD 231 in 2020 to USD 307 in 2021 and USD 416 in 2022.

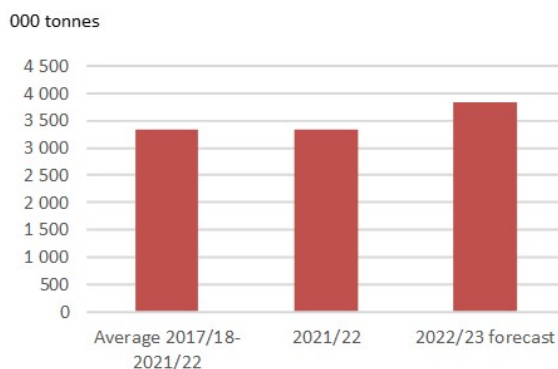
In June, as a response to the high international prices exaggerated by the war in Ukraine and challenging domestic fiscal environment, the World Bank announced a USD 130 million loan to help the country to finance soft wheat imports for bread production and barley imports for feed.

Sluggish economic growth and increases in food price inflation

Following the contraction in Gross domestic product (GDP) of about 8.6 percent in 2020, mostly due to the collapse of the tourism sector resulting from travel restrictions, the economic growth partially resumed, registering a 3.3 percent increase in 2021. A GDP growth of 2 percent is foreseen in 2022, but high unemployment levels still prevail. Unemployment increased from 15 percent prior to the COVID-19 pandemic to over 20 percent in 2022, severely affecting young people (aged 15-24) as about 40 percent of them are currently jobless.

Tunisia

Cereals Imports



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

Source: FAO/GIEWS Country Cereal Balance Sheets.

In spite of the country's high import dependency rate, changes in international prices of wheat products and vegetable oil are not fully transmitted into domestic prices as the government's universal food subsidy programme keeps them stable. There have been discussions about reforming the subsidy system, which puts a significant burden on the national budget, but the implementation has been postponed so far.

The general Consumer Price Index in June increased by 8.1 percent on a year-on-year basis, increasing for the ninth straight month and reaching the highest levels since the early 1990s. The food price inflation in June rose by 9.5 percent compared to June 2021, mainly driven by the high prices of edible oils (+19.2 percent), fruits (+15.9 percent) and vegetables (+12.1 percent).

The talks with the International Monetary Fund (IMF) for a bailout package are ongoing, amidst balance of payments problems.

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GIEWS Country Brief Tunisia

Reference Date: 27-July-2021

FOOD SECURITY SNAPSHOT

- Above-average cereal production harvested in 2021
- Cereal import requirements forecast to remain stable in 2021/22 marketing year
- Sluggish economic growth and increases in food price inflation

Above-average cereal production harvested in 2021

Harvesting of the 2021 winter cereals is about to conclude. Sowing took place under relatively favourable conditions between late October and early December 2020. Although inadequate rainfall amounts in January and February raised concerns about crop conditions, favourable rainfall amounts and distribution in the following months, particularly in April during the grain filling stage, contributed to crop recovery in the main cereal producing areas in the northern part of the country.

In central and southern parts of the country, where cereal production is less important, rainfall deficits affected rangelands. Low quality of pasture has necessitated securing supplementary feed sources and livestock owners deem feed expensive.

Although the production of phosphate has been shrinking since 2011, when it was the main earner of foreign currency, the country is still among the most important world producers. The chemical fertilizer plant in Gafsa Governorate remained closed between November 2020 and May 2021 due to general strikes in the area and resulting in a dramatic decline in supply. Already at the end of October 2020, only one quarter of domestic fertilizer demand was satisfied. Although supplementary imports were authorized by the government to cover the shortage, farmers reported disruptions in the supply. Increases in prices of fertilizers by 30-50 percent are also reported.

Despite fertilizer shortages, the 2021 cereal production is estimated at an above-average level of 1.8 million tonnes, over 20 percent above the 2020 average harvest on account of favourable weather conditions. Domestic crop production varies markedly from year to year because of significant rainfall variations. The irrigated wheat area represents less than 15 percent of the total wheat planted area.

The country aims to reach a domestic production of 2.9 million tonnes of cereals per year in order to achieve self-sufficiency.

Tunisia

Crop Calendar

(*major foodcrop)



Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Tunisia

Cereal Production

	2016-2020 average	2020	2021 estimate	change 2021/2020
	000 tonnes			percent
Wheat	1 120	1 043	1 200	15.1
Barley	499	465	600	29.0
Cereals NES	30	28	31	10.7
Others	3	3	3	0.0
Total	1 652	1 539	1 834	19.2

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Policy instruments used by the government include guaranteed farmgate prices (ranging from TDD 400/USD 145 per tonne of barley to TDD 620/USD 225 per tonne of durum wheat, with minimal year on year adjustments), subsidized certified seeds, an irrigation water subsidy as well as the provision of technical assistance to farmers producing wheat on irrigated areas.

Cereal imports to remain stable in 2021/22 marketing year

The country relies heavily on grain imports, mainly common wheat, even in years with good production. Cereal import requirements in the 2021/22 marketing year (July/June) are forecast at an average level of about 3.7 million tonnes, similar to the previous marketing year. More than half of the imported cereals is wheat, sourced mostly from Ukraine, the Russian Federation and the European Union.

The food trade balance recorded a deficit of USD 290.9 million (TDD 806.9 million) during the first six months of 2021 compared to a deficit of USD 49.4 million (TDD 137.1 million) during the same period of the previous year. In value terms, food exports decreased by 10.2 percent while imports increased by 13.8 percent. The deficit recorded mainly results from the increase in the rate of cereal imports (+20.9 percent) and the drop in olive oil exports (-26.9 percent).

Sluggish economic growth and increases in food price inflation

Even before the onset of the COVID-19 pandemic, the country experienced sluggish economic growth, high unemployment levels and deteriorating public services. In 2020, the economy contracted about 8.6 percent, mostly due to the collapse of the tourism sector resulting from travel restrictions. A Gross domestic product (GDP) growth of 2 percent is foreseen in 2021, but high unemployment levels still prevail. Unemployment increased from 15 percent prior to the COVID-19 pandemic to 17.8 percent by the end of the first quarter of 2021, severely affecting young people (aged 15-24) as over 40 percent of them are currently jobless.

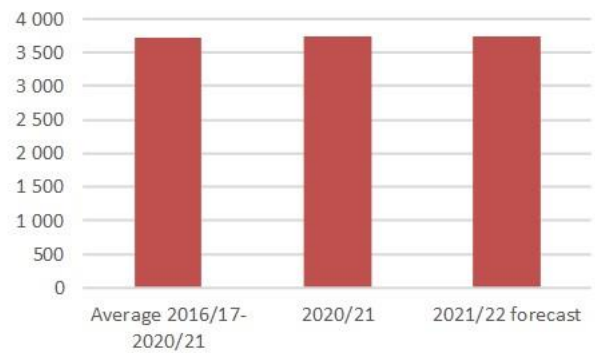
In spite of the country's high import dependency rate, changes in international prices of wheat products and vegetable oil are not fully transmitted into domestic prices as the government's universal food subsidy programme keeps them stable. There have been discussions about reforming the subsidy system, which puts a significant burden on the national budget, but the implementation has been postponed so far. The food and beverage Consumer Price Index in June 2021 increased by 7.2 percent on a year-on-year basis, up from 4-5 percent between November 2020 and March 2021. The food price inflation in June 2021 was mainly driven by the high prices of edible oils (+16.5 percent year on year), vegetables (+13 percent) and animal proteins (+6-8 percent).

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Tunisia

Cereals Imports

000 tonnes



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

Source: FAO/GIEWS Country Cereal Balance Sheets.



GIEWS Country Brief Tunisia

Reference Date: 20-October-2020

FOOD SECURITY SNAPSHOT

- Near-average cereal production harvested in 2020
- Cereal imports forecast to increase in 2020/21 marketing year
- Economy contracts and food price inflation increases mainly due to measures aimed to contain spread of COVID-19

Near-average cereal production harvested in 2020

Land preparation for sowing of the 2021 grain crop is currently ongoing under favourable weather conditions. Seasonal rains started in September with above-average amounts in most cropping areas. Winter wheat and barley crops will be sown from early November, after the rains adequately replenish soil moisture. The Government estimates that 1.33 million hectares will be planted with wheat and barley in 2020 (for harvest from May 2021), up from the 1 million hectares planted in 2019 when lack of precipitation delayed plantings.

Harvesting of the 2020 winter grains finished in July. The season was characterized by well below-average rainfall amounts in January and February, but abundant rainfall from mid-March into early April coincided with the early stages of crop reproduction and improved yield prospects. The 2020 cereal production is estimated at a near-average level of 1.5 million tonnes, over one-third below the 2019 bumper harvest on the account of less favourable weather conditions and reduced plantings. Domestic crop production varies markedly from year-to-year because of significant rainfall variations. The irrigated wheat area represents less than 15 percent of the total wheat planted area.

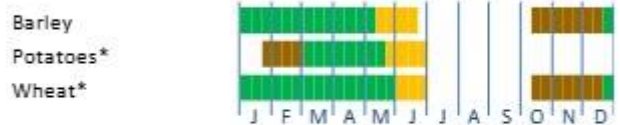
The country aims to reach a domestic production of 2.7 million tonnes of cereals per year. Policy instruments used by the Government include, guaranteed farm-gate prices (TDD 820/USD 288 per tonne of durum wheat, TDD 590/USD 207 per tonne of common wheat and TDD 530/USD 186 per tonne of barley, unchanged since 2019/20 marketing year), subsidized inputs, including irrigation water as well as the provision of technical assistance to farmers producing irrigated wheat.

The measures introduced to contain the spread of the COVID-19 pandemic did not have a major impact on the cereal supply chains. However, a decline in domestic and external demand

Tunisia

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Tunisia

Cereal Production

	2015-2019 average	2019	2020 estimate	change 2020/2019
	000 tonnes			percent
Wheat	1 094	1 454	1 043	-28.3
Barley	479	912	465	-49.0
Cereals NES	30	26	28	7.7
Others	3	3	3	0.0
Total	1 606	2 395	1 539	-35.7

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

resulted in an oversupply of apples and dates. To support farmers affected by the decreased demand, the Government initiated a stockpiling and stock financing policy for olive oil and dates.

Cereal imports forecast to increase in 2020/21 marketing year

The country relies heavily on grain imports, mainly common wheat, even in years with good production. Reflecting an average domestic harvest, cereal import requirements in the 2020/21 marketing year (July/June) are forecast at about 4.1 million tonnes, about 14 percent above the imports of the previous marketing year and 10 percent above the five-year average. More than half of the imported cereals is wheat, sourced mostly from Ukraine, the Russian Federation and the European Union.

Economy contracts and food price inflation increases

The economy contracted about 20 percent year on year in the second quarter of 2020, compared to 2 percent in the first quarter, mostly due to the collapse of the tourism sector resulting from travel restrictions aimed to contain the spread of the COVID-19 pandemic. The decrease in employment opportunities is likely to have a severe impact particularly on the purchasing power of the informal sector workers. Following the start of the pandemic in March, the Government provided one-off cash transfers to 623 000 households: the most vulnerable groups, including retirees, handicapped and poor families ranging from TND 100 (USD 34) to TND 200 (USD 68). Workers in the formal sector affected by the containment measures were provided unemployment benefits.

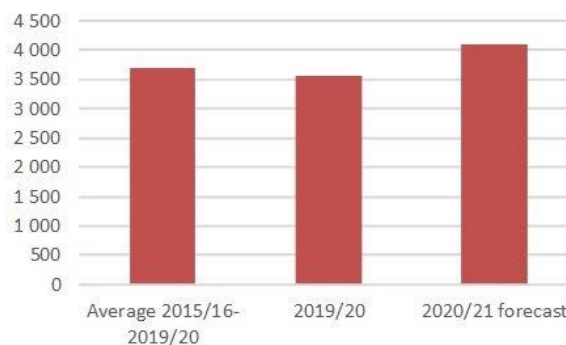
In spite of the country's high import dependency rate, changes in international grain prices do not fully translate into changes in domestic prices as the Government's universal food subsidy programme keeps prices of wheat products and vegetable oil stable. Overall, the food and beverage Consumer Price Index in September 2020 increased by 5.3 percent on a year-on-year basis, up from 3.9 percent in August, but remains below the levels of 7 percent recorded in October 2019. The food price inflation in September 2020 was mainly driven by the high prices of fresh foods.

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Tunisia

Cereals Imports

000 tonnes



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

Source: FAO/GIEWS Country Cereal Balance Sheets.



GIEWS Country Brief Tunisia

Reference Date: 30-April-2020

FOOD SECURITY SNAPSHOT

- Close-to-average cereal production expected in 2020
- Cereal imports in 2020/21 forecast to increase
- Annualized food inflation increased in March 2020 compared to month earlier

Close-to-average cereal production expected in 2020

Harvesting of the 2020 winter grains will start in the second half of May. Low soil moisture in autumn delayed planting to December. While improved precipitation in December partially offset moisture deficits, lack of rains in January and February led to localized deterioration of crop conditions, particularly in the northern regions. Coinciding with the early stages of crop reproduction, timely rainfall from mid-March into early April improved yield prospects.

The 2020 cereal production is preliminarily forecast at a near-average level of 1.5 million tonnes, over one-third below the 2019 bumper harvest.

For the 2020 harvest, about 556 000 hectares were planted with wheat and 518 000 hectares with barley, compared to 700 000 and 620 000 hectares, respectively, planted in 2018. The decrease is mainly due to unfavourable weather conditions at planting. Seeds and fertilizers were available across the country.

The country aims to reach a domestic production of 2.7 million tonnes of cereals per year. Policy instruments used by the Government include guaranteed farm-gate prices (TDD 820/USD 288 per tonne of durum wheat, TDD 590/USD 207 per tonne of common wheat and TDD 530/USD 186 per tonne of barley in the 2019/20 marketing year), subsidized input and irrigation water prices as well as provision of technical assistance to irrigated wheat production. Domestic crop production varies markedly from year-to-year because of significant rainfall variations. The irrigated wheat area represents less than 15 percent of the total wheat planted area.

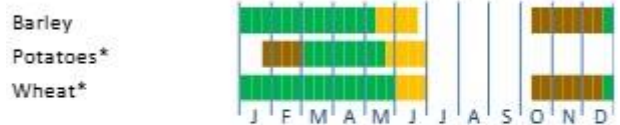
Cereal imports in 2020/21 forecast to increase

The country relies heavily on grain imports, mainly wheat, even in years with good production. Accordingly, reflecting an average domestic harvest, cereal import requirements in the 2020/21 marketing year (July/June) are forecast at about 3.8 million

Tunisia

Crop Calendar

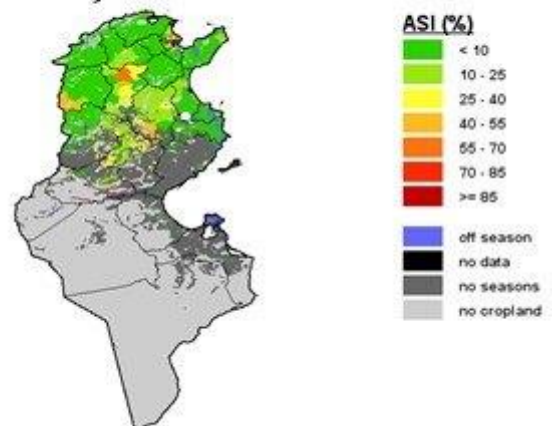
(*major foodcrop)



Source: FAO/GIEWS.

Tunisia - Agricultural Stress Index (ASI)

from start of season 1 to Dekad 1, April 2020



Source: FAO/GIEWS Earth Observation System.

tonnes, about 20 percent above the imports of the previous marketing year and 5 percent above the five-year average.

Annualized food inflation increased in March 2020

In spite of the country's high import dependency rate, changes in international grain prices do not fully translate into changes in domestic prices as the Government's universal food subsidy programme keeps prices of wheat products and vegetable oil stable. Overall, the food and beverage Consumer Price Index (CPI) in March 2020 increased by 5.1 percent on a year-on-year basis, up from 3.7 percent in February, but remains below the levels of 7 percent recorded in autumn 2019. The food price inflation in March 2020 was driven by higher prices of fresh foods and increased consumer demand associated with the lockdown following the COVID-19 outbreak. The Ministry of Energy, Mines and Energy Transition decreased the price of certain petroleum products starting from 7 April 2020 to reflect the recent reduction of global oil prices.

COVID-19 and measures adopted by the Government

The Government declared a nationwide lockdown on 21 March 2020 restricting the movement of people, closing non-essential public spaces and introducing measures of social distancing. Progressive easing of restrictions is planned after 3 May 2020.

To ease the economic impact of the lockdown, several measures were introduced, including:

- One-off cash transfers to 623 000 households: the most vulnerable groups, including retirees, handicapped and poor families ranging from TND 100 (USD 34) to TND 200 (USD 68).
- Waivers for formal businesses to delay payments of the employer's contribution to the social security scheme for three months.
- Unemployment benefits for affected workers in the formal system.
- Cash transfers to households working in the informal sector, which are not covered by any social assistance programmes and are particularly vulnerable to economic shocks (households registered in the social security system with low-cost healthcare card).

The International Monetary Fund (IMF) approved an emergency assistance loan of USD 745 million (around TND 2.2 billion) to provide additional resources for the health sector, social safety nets and businesses affected by the crisis.

No disruptions in agricultural supply chains were reported.

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Tunisia

Cereal Production

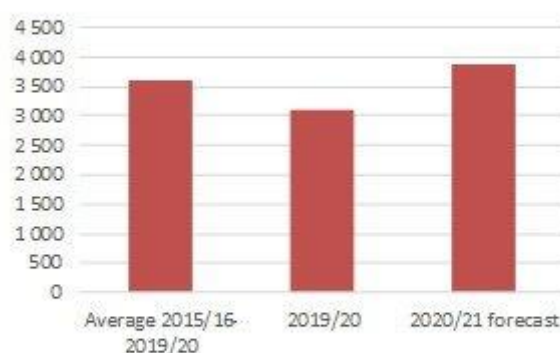
	2015-2019 average	2019	2020 forecast	change 2020/2019
	000 tonnes			percent
Wheat	1 094	1 454	1 000	-31.2
Barley	479	912	500	-45.2
Cereals NES	31	31	28	-9.7
Others	3	3	3	0.0
Total	1 607	2 400	1 531	-36.2

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheet.

Tunisia

Cereals Imports

000 tonnes



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

Source: FAO/GIEWS Country Cereal Balance Sheets.



GIEWS Country Brief Tunisia

Reference Date: 31-May-2019

FOOD SECURITY SNAPSHOT

- **Bumper cereal production expected in 2019**
- **Cereal imports in 2019/20 forecast to decrease**
- **Annualized food inflation eased in April 2019 compared to month earlier**

Bumper cereal production expected in 2019

The 2019 barley is being harvested, while the harvest of wheat will take place in June. The above-average precipitations across the main growing areas between September and the first decade of November encouraged early planting and provided a sufficient soil moisture for the crop establishment and development. Favourably distributed rains in sufficient quantity continued into spring. In the first decade of April and later in May, abundant rainfall resulted in localized waterlogging, particularly in the Kairouan region.

Preliminary forecasts for the 2019 cereal production point to a bumper cereal crop of almost 2.2 million tonnes, over 55 percent above the 2018 weather-stricken harvest and over 40 percent above the average. For the 2019 harvest, about 700 000 hectares were planted with wheat and 620 000 hectares with barley, compared to 620 000 and 525 000 hectares, respectively, planted in 2018. Seeds and fertilizers were available across the country.

The country aims to reach a domestic production of 2.7 million tonnes of cereals per year. Policy instruments used include guaranteed farm-gate prices (TDD 750/USD 250 per tonne of durum wheat, TDD 540/USD 180 per tonne of common wheat and TDD 480/USD 160 per tonne of barley in the 2018/19 marketing year), subsidized input and irrigation water prices as well as technical assistance to irrigated wheat production. Domestic crop production varies markedly from year to year because of the significant rainfall variations. The irrigated wheat area represents less than 15 percent of the total wheat planted area.

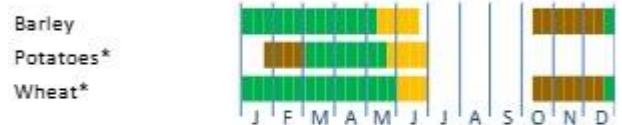
Cereal imports in 2019/20 forecast to decrease

The country relies heavily on grain imports, mainly wheat, even in years with good production. Accordingly, reflecting a bumper domestic harvest, cereal import requirements in the current 2019/20 marketing year (July/June) are put at about 2.9 million tonnes, some 20 percent below the imports of the previous marketing year and the five-year average.

Tunisia

Crop Calendar

(*major foodcrop)

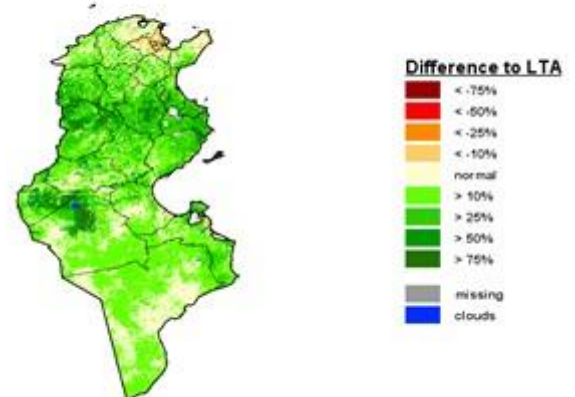


Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Tunisia - NDVI anomaly

Relative difference to Long Term Average, Dekad 1 May 2019



Source: FAO/GIEWS Earth Observation System.

Annualized food inflation eased in April 2019

In spite of the country's high import dependency rate, changes in international grain prices do not fully translate into changes in domestic prices as the Government's universal food subsidy programme keeps prices of wheat products and vegetable oil stable. Overall, the food and beverage Consumer Price Index (CPI) in April 2019 recorded an increase 6.6 percent on a year-on-year basis, down from 7.5 percent in March. The food price inflation in April was driven by higher prices of fresh vegetables, eggs, dairy products and meat.

Tunisia

Cereal Production

	2014-2018 average	2018	2019 forecast	change 2019/2018
	000 tonnes			percent
Wheat	1 106	1 075	1 500	39.5
Barley	451	316	700	121.5
Cereals NES	31	31	31	0.0
Others	3	3	3	0.0
Total	1 591	1 425	2 234	56.8

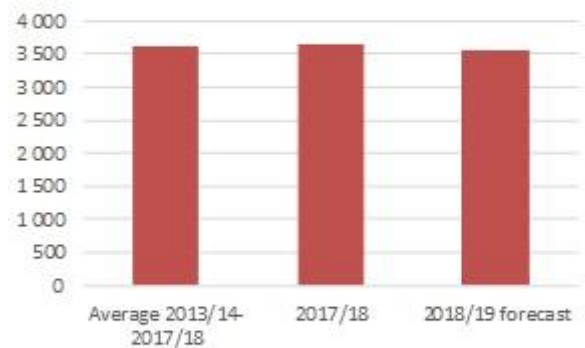
Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Tunisia

Cereals Imports

000 tonnes



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

Source: FAO/GIEWS Country Cereal Balance Sheets.

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GIEWS Country Brief Tunisia

Reference Date: 14-December-2018

FOOD SECURITY SNAPSHOT

- Below-average cereal production gathered in 2018
- Cereal imports in 2018/19 forecast at average level
- Food inflation increased in October

Below-average cereal production gathered in 2018

Sowing of the 2019 grain crops started in October and the bulk of the winter wheat and barley was sown in November. Unlike in the previous three years, when rainfall deficits delayed plantings until December, above-average precipitation across the main growing areas between September and the first decade of November replenished soil moisture and increased water reserves in dams. Crops are well established and favourable soil moisture conditions supported early emergence of wheat crops.

Harvesting of the 2018 winter grains was completed in June. The 2018 cereal production was officially estimated at about 1.4 million tonnes, 10 percent below the 2017 average harvest. For the 2019 harvest, about 700 000 hectares are planned to be planted with wheat and 620 000 hectares with barley, compared to 620 000 and 525 000 hectares, respectively, planted in the previous year. It is reported that seeds and fertilizers were available across the country.

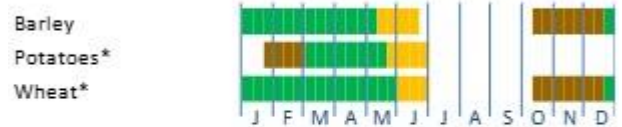
The country aims to reach a domestic production of 2.7 million tonnes of cereals per year. Policy instruments used include guaranteed farmgate prices (USD 312 per tonne of durum wheat, USD 225 per tonne of common wheat and USD 200 per tonne of barley in the 2018/19 marketing year), subsidized input and irrigation water prices as well as technical assistance to irrigated wheat production. Domestic crop production varies markedly from year to year because of the significant rainfall variations. The irrigated wheat area represents less than 15 percent of the total wheat planted area.

Cereal imports in 2018/19 forecast at average level

The country relies heavily on grain imports, mainly wheat, even in years with good production. Accordingly, cereal import requirements in the current 2018/19 marketing year (July/June) are put at about 3.5 million tonnes, close to the imports of last year and the five-year average.

Tunisia

Crop Calendar (*major foodcrop)



Sowing

Growing

Harvesting

Source: FAO/GIEWS.

Tunisia

Cereal Production

	2013-2017 average	2017	2018 estimate	change 2018/2017
	000 tonnes			percent
Wheat	1 086	1 100	1 050	-4.5
Barley	446	476	362	-23.9
Cereals NES	31	30	31	3.3
Others	3	3	3	0.0
Total	1 565	1 609	1 446	-10.1

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

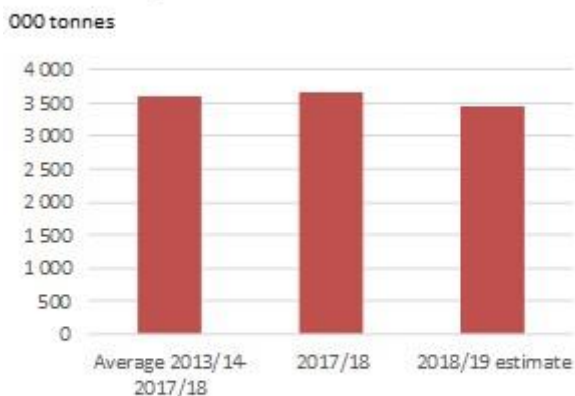
Annualized food inflation increased in October 2018

In spite of the country's high import dependency rate, changes in international grain prices do not fully translate into changes in domestic prices as the Government grants subsidies to most basic food items. Prices of wheat products, the main staple in the country, are relatively stable as reflected by the very low inflation rate of bread and cereals (less than 3 percent on a yearly basis since January 2012). Overall, the food and beverage Consumer Price Index (CPI) in October 2018 recorded an increase of 6 percent on a year-on-year basis, up from 5.8 percent in September.

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Tunisia

Cereals Imports



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

Source: FAO/GIEWS Country Cereal Balance Sheets.



GIEWS Country Brief Tunisia

Reference Date: 31-October-2017

FOOD SECURITY SNAPSHOT

- Average cereal production gathered in 2017
- Cereal imports in 2017/18 forecast at average level
- Food inflation increased in August

Average cereal production gathered in 2017

Land preparation for the sowing of the 2018 grain crop is currently underway under favourable weather conditions. Although in some parts sowing starts in October, the bulk of the winter wheat and barley is sown in November.

Harvesting of the 2017 winter grains finished in June. The 2017 cereal production was officially estimated at about 1.6 million tonnes, 25 percent above the 2016 weather-stricken harvest and on par with the previous five-year average (2012-2016). For the 2017 harvest, some 800 000 hectares were planted with wheat and 640 000 hectares with barley, compared to 610 000 and 500 000 hectares, respectively, planted in the previous year. Slightly over 400 000 hectares of cereals were affected by rainfall deficits during the season, mostly in the northern part of the country, seriously limiting production recovery. A normal availability of seeds and fertilizers was reported.

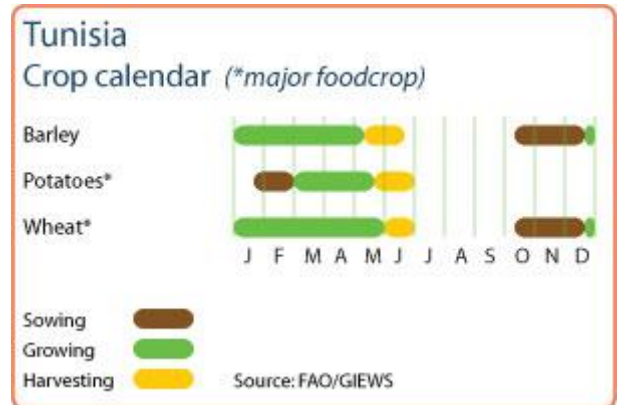
Local crop production varies markedly from year to year because of the significant rainfall variations. The irrigated wheat area represents less than 15 percent of the total wheat planted area.

Cereal imports in 2017/18 forecast at average level

The country relies heavily on grain imports, mainly wheat, even in good production years. Accordingly, cereal import requirements in the current 2017/18 marketing year (July/June) are put at about 3.7 million tonnes, about the same as last year and close to the five-year average.

Annualised food inflation increased in August 2017

In spite of the country's high import dependency rate, changes in international grain prices do not fully translate into changes in domestic prices, mainly due to the Government subsidies on basic food items. Prices of wheat products, the main staple in the country, are relatively stable as reflected by the very low inflation



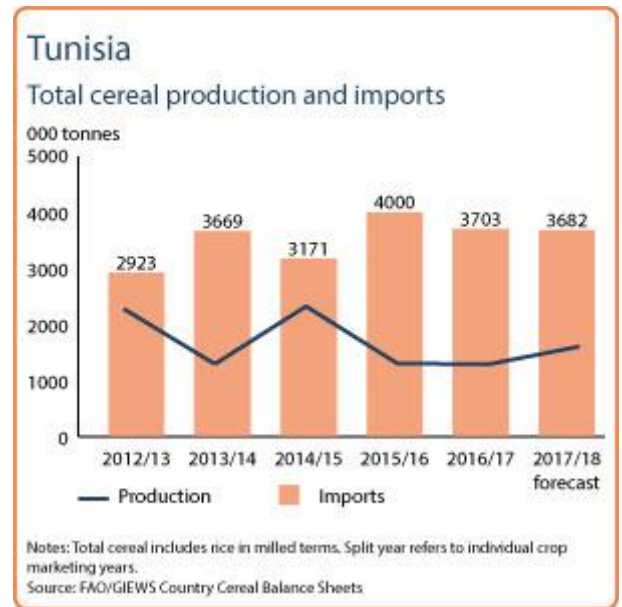
Tunisia
Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Wheat	1 170	927	1 100	19
Barley	497	328	476	45
Cereals nes	31	34	30	-12
Others	1	1	1	0
Total	1 699	1 290	1 607	25

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

rate of bread and cereals (less than 3 percent on a yearly basis since January 2012). Overall, the food and beverage Consumer Price Index (CPI) in September 2017 recorded an increase of 6 percent on a year-on-year basis, compared to around 3 percent in August 2016.

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GIEWS Country Brief Tunisia

Reference Date: 10-May-2017

FOOD SECURITY SNAPSHOT

- Favourable crop conditions despite lower-than-average rainfall
- Below-average cereal harvest gathered in 2016 due to lack of precipitation at beginning of season
- Food inflation increasing
- Economic growth slows down again

Favourable crop conditions despite lower-than-average rainfall

Harvesting of winter grains usually starts in mid-May and concludes in June. So far, crop conditions remain favourable despite lower-than-average rainfall in February and March. In the current crop year, some 800 000 hectares were planted with wheat, compared to 610 000 hectares in the previous year.

Normal availability of seeds and fertilizers is reported. In Tunisia, crop production varies markedly from year to year because of the significant rainfall variations. The irrigated wheat area represents less than 15 percent of the total wheat planted area.

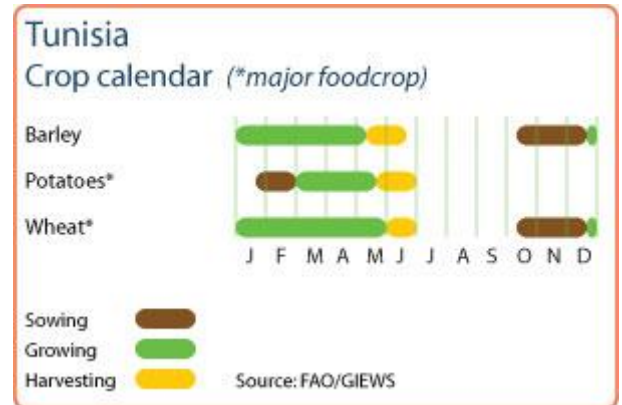
Below-average cereal harvest gathered in 2016

Although favourable weather conditions prevailed for most of the 2016 season, the lack of precipitation in the beginning of the crop year limited the area sown with winter cereals. Consequently, a well below-average cereal harvest of 1.3 million tonnes was gathered in 2016. At this level, production was 9 percent higher than the previous year's below-average crop but 32 percent below the five-year average.

Tunisia relies heavily on grain imports, mainly wheat, even in good production years. Accordingly, cereal import requirements in the current 2016/17 marketing year (July/June) are put at about 3.9 million tonnes, about 4 percent lower than last year and 15 percent higher than the five-year average.

Food inflation increasing

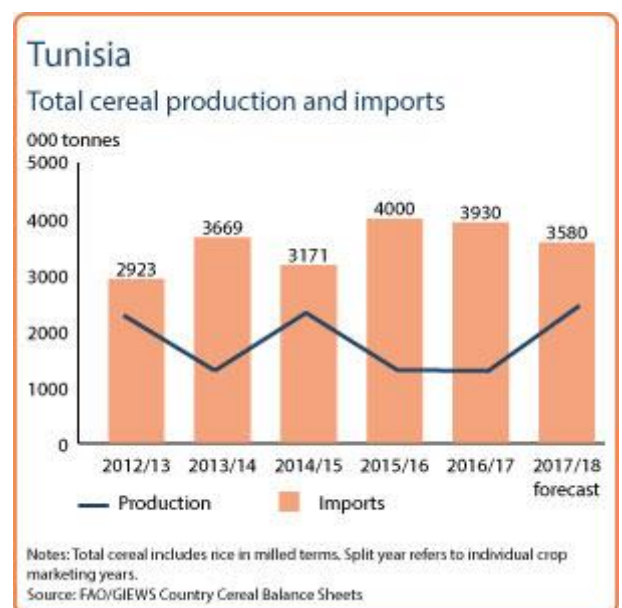
In spite of the country's high import dependency rate, changes in international grain prices do not fully translate into changes in domestic prices, mainly due to the Government subsidies on basic food items. Prices of wheat products, the main staple in the country, are relatively stable as reflected by the very low inflation rate of bread and cereals (less than 3 percent on a yearly basis since January 2012). Overall, the food and beverage Consumer



Tunisia
Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes		percent	
Wheat	1,170	927	1,700	83
Barley	497	328	720	120
Cereals nes	31	34	30	-12
Others	1	1	1	0
Total	1,699	1,290	2,451	90

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Price Index (CPI) in March 2017 recorded an increase of 5 percent on a year-on-year basis, compared to around 1 percent in February 2016.

Economic growth slowed down again in 2016

The economy was slowly recovering from the 1.8 percent contraction in 2011, although the continuing risk of terrorist attacks and their negative impact on the economy, together with the slow recovery in the European Union (Tunisia's main trading partner) are affecting the recovery. Real GDP growth in 2016 was estimated by the National Statistical Institute at 1 percent. Some recovery is likely in 2017 but will remain below the pre-revolution average slowed down by sluggish demand and social tensions. As such, it will not be sufficient to tackle high unemployment rates, currently at 15 percent.

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GIEWS Country Brief Tunisia

Reference Date: 24-November-2016

FOOD SECURITY SNAPSHOT

- Favourable conditions for planting of 2017 winter grain crops
- Below average cereal harvest gathered in 2016 due to lack of precipitation in beginning of season
- Relatively stable domestic grain prices observed
- Economic growth slows down again; high unemployment rates, in particular among young people, remains a concern

Favourable conditions for planting of 2017 winter grain crops

Sowing of winter grains usually starts in mid-October and concludes in mid-December. So far, this agricultural season dry weather facilitated field preparation and early winter grain sowing. Although above-average temperatures prevailed, soil moisture remained satisfactory due to above-average rainfall since 1 September.

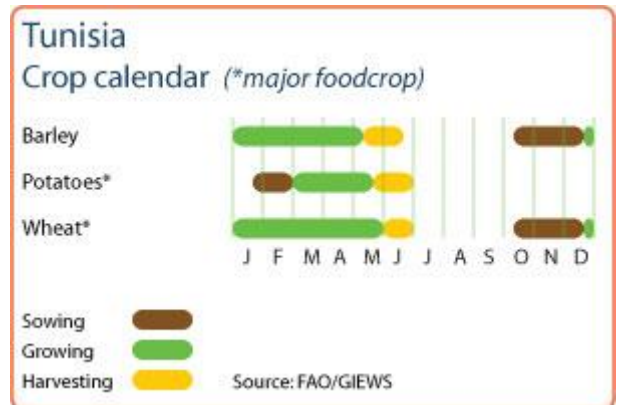
Normal availability of seeds and fertilizers is reported. In Tunisia, crop production varies markedly from year to year because of the significant rainfall variations. The irrigated wheat area represents less than 15 percent of the total wheat planted area.

Below average cereal harvest gathered in 2016

Although favourable weather conditions prevailed for most of the 2016 season, the lack of precipitation in the beginning of the crop year limited the area sown with winter cereals. Out of the planned 1.4 million hectares to be planted with cereals, some 1.2 million hectares materialized, with decreases in planting in less productive areas in the centre and in the south. Slightly less than 650 000 hectares of wheat and about 530 000 hectares of barley were planned.

Consequently, a well below-average cereal harvest of 1.4 million tonnes was gathered in 2016. At this level, production was 9 percent higher than previous year's below-average crop but 27 percent below the five-year average.

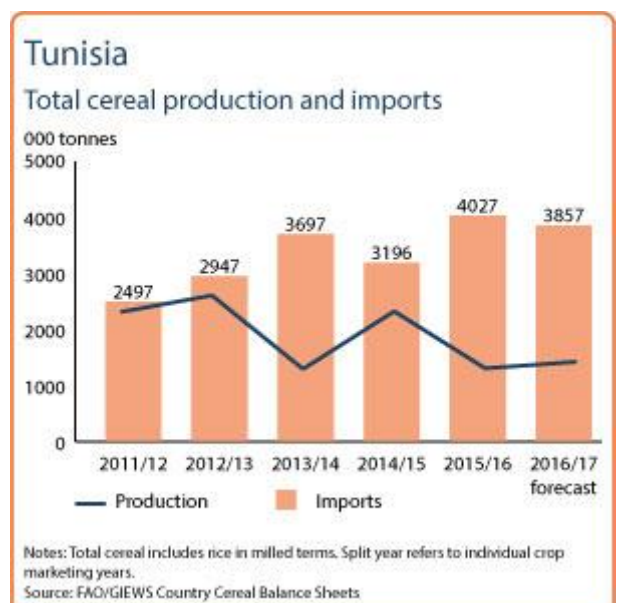
Tunisia relies heavily on grain imports, mainly wheat, even in good production years. Accordingly, cereal import requirements in the current 2016/17 marketing year (July/June) are put at about 3.9 million tonnes, about 4 percent lower than last year and 15 percent higher than the five-year average.



Tunisia
Cereal production

	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes			percent
Wheat	1 356	913	1 000	10
Barley	583	364	400	10
Cereals nes	29	29	24	-17
Others	1	1	1	0
Total	1 969	1 307	1 425	9

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Domestic grain prices stable

In spite of the country's high import dependency rate, changes in international grain prices do not fully translate into changes in domestic prices, mainly due to the Government subsidies on basic food items. Prices of wheat products, the main staple in the country, are relatively stable as reflected by the very low inflation rate of bread and cereals (less than 3 percent on a yearly basis since January 2012). Overall, the food and beverage Consumer Price Index (CPI) in October 2016 recorded an increase of 2.7 percent on a year-on-year basis, compared to over 3 percent in October 2015.

Economic growth slows down again, unemployment rate remains high

The economy was slowly recovering from the 1.8 percent contraction in 2011, although the continuing risk of terrorist attacks and their negative impact on the economy, together with the slow recovery in the European Union (Tunisia's main trading partner) are affecting the recovery. Real GDP growth in 2015 was estimated by the Ministry of Finance at 0.3 percent.

The unemployment rate remains at a high level (15.3 percent in 2015, a slight decrease from the 19 percent in 2011). Youth unemployment (15-29 year-olds) remains particularly high reaching over 30 percent in 2012. Following the protests in early 2016, the Government announced programmes for new state jobs in an attempt to reduce unemployment.

Reference Date: 16-March-2016

FOOD SECURITY SNAPSHOT

- Relatively favourable prospects for 2016 winter grain crops despite erratic but well-timed rains
- Below average cereal harvest gathered in 2015 due to heat damage suffered towards end of season
- Relatively stable domestic grain prices observed
- Economic growth slows down again; high unemployment rates, in particular among young people, remains a concern

Relatively favourable prospects for 2016 winter grain crops

Sowing of the 2016 winter grains concluded in December. The agricultural season so far has been characterized by irregular, below average but well-timed rains. From remotely-sensed information, only a small share of land sown to cereals is currently affected by localized drought in the eastern part of the country. Unlike in the neighbouring countries affected by drought, winter grain prospects in Tunisia remain relatively favourable, pending normal weather developments for the rest of the season.

Normal availability of seeds and fertilizers was reported. Out of the planned 1.4 million hectares to be planted with cereals, some 1.2 million hectares materialized, with decreases in planting in less productive areas in the centre and in the south. Slightly less than 650 000 hectares of wheat and about 530 000 hectares of barley were planned. About 80 percent of the wheat grown is durum.

In Tunisia, crop production varies markedly from year to year because of the significant rainfall variations. The irrigated wheat area represents less than 15 percent of the total wheat area planted.

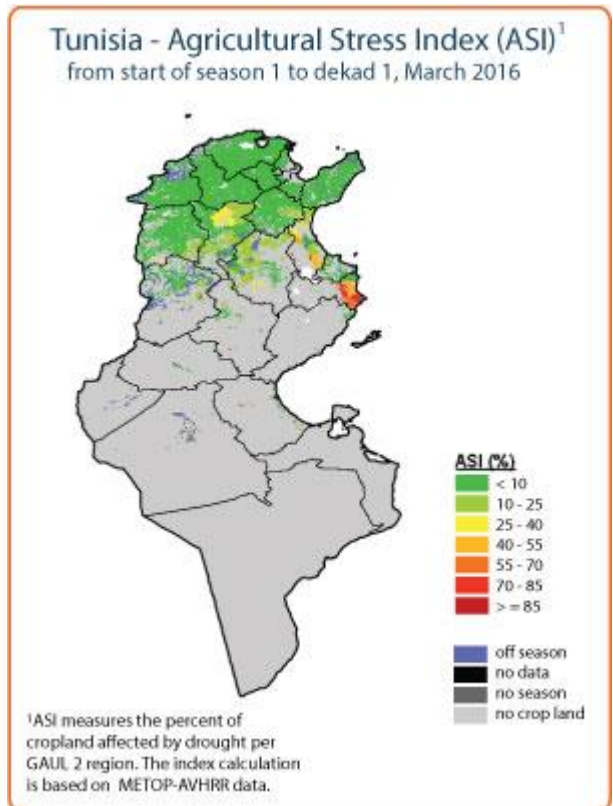
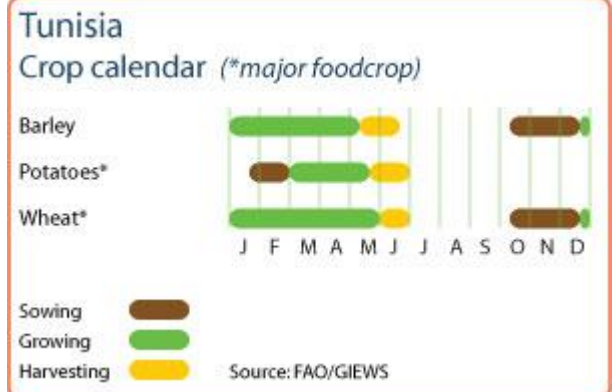
Below average cereal harvest gathered in 2015

Although favourable weather conditions prevailed for most of the 2015 season, excessively hot weather (up to 45 degrees Celsius) led to heat-related damages to late developing wheat in its early grain-filling stages. Consequently, a well below-average cereal harvest of 1.3 million tonnes was gathered in 2015. At this level, production was 44 percent lower than previous year's above-average crop and 32 percent below the five-year average.

Tunisia relies heavily on grain imports, mainly wheat, even in good production years. Accordingly, cereal import requirements in the current 2015/16 marketing year (July/June) are put at about 3.6 million tonnes, about 20 percent higher than last year and 15 percent higher than the five-year average.

Domestic grain prices stable

In spite of the country's high import dependency rate, changes in international grain prices do not fully translate into changes in domestic prices, mainly due to the Government subsidies on basic food items. Prices of wheat products, the main staple in the country, are relatively



Tunisia Cereal production

	2010-2014 average	2014	2015 estimate	change 2015/2014
	000 tonnes		percent	
Wheat	1 338	1 510	913	-40
Barley	557	780	364	-53
Cereals nes	27	30	29	-3
Others	1	1	1	0
Total	1 923	2 321	1 307	-44

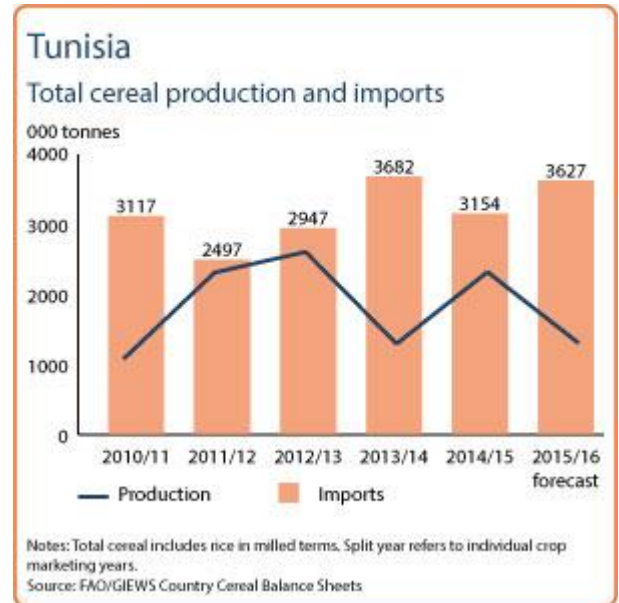
Note: percentage change calculated from unrounded data. Source: FAO/GIEWS Country Cereal Balance Sheets

stable, as reflected by the very low inflation of bread and cereals (less than 3 percent on a yearly basis since January 2012). Overall, the food and beverage Consumer Price Index (CPI) in January 2016 recorded an increase of 1.4 percent on a year-on-year basis, compared to over 3 percent in November 2015.

Economic growth slows down again, unemployment rate remains high

The economy was slowly recovering from the 1.8 percent contraction in 2011, although the continuing risk of terrorist attacks and their negative impact on the economy, together with the slow recovery in the European Union (Tunisia's main trading partner) are affecting on the recovery. Real GDP growth in 2015 was estimated by the Ministry of Finance at 0.3 percent.

The unemployment rate remains at a high level (15.3 percent in 2015, a slight decrease from the 19 percent in 2011). Youth unemployment (15-29 year-olds) remains particularly high reaching over 30 percent in 2012. Following the protests in early 2016, the Government announced programmes for new state jobs in an attempt to reduce unemployment.



Reference Date: 14-December-2015

FOOD SECURITY SNAPSHOT

- Average but erratic rains at the start of 2016 winter grains planting
- Below-average cereal harvest gathered in 2015 due to heat damage suffered towards end of season
- Relatively stable domestic grain prices observed
- Economic growth slows down again; high unemployment rates, in particular among young people, remains a concern

Planting of 2016 winter grains have started

Sowing of 2016 winter grains is currently underway. Irregular but so far average cumulative rains characterized the beginning of the agricultural season. Normal availability of seeds and fertilizers is reported. About 1.4 million hectares are expected to be planted with cereals.

To improve access to credit for small and medium-sized agricultural producers and facilitate their integration to commercial banking, the Government is progressing with automatic debt relief.

Below-average cereal harvest gathered in 2015

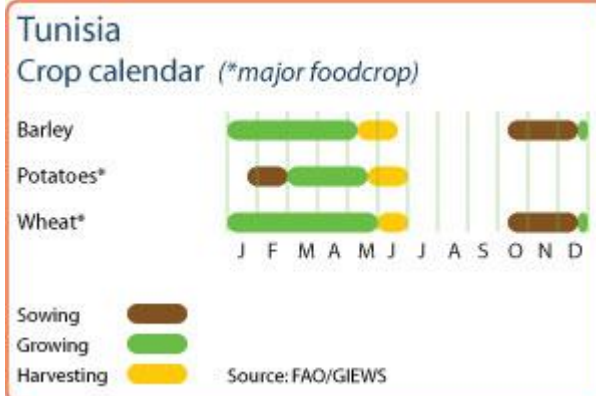
The 2015 winter grain harvest in Tunisia concluded at the end of June. Although favourable weather conditions prevailed for the most part of the season, excessively hot weather (up to 45 degrees Celsius) led to heat-related damages to late developing wheat in early grain-filling stages.

In 2015 a well below-average cereal harvest of 1.3 million tonnes was gathered. At this level, the crop is over 40 percent lower than last year's above-average crop and some 32 percent below the previous five-year average. Most of the grain produced is wheat which in 2015, at about 900 000 tonnes, recorded a decrease of 40 percent compared to last year's above-average harvest. In Tunisia, crop production varies markedly from year to year depending on the significant rainfall variations. Irrigated wheat area represents less than 15 percent of the total wheat area planted.

Tunisia relies heavily on grain imports, mainly wheat, even in good production years. Accordingly, cereal import requirements in the current 2015/16 marketing year (July/June) are put at about 3.5 million tonnes, about 20 percent higher than last year and 15 percent higher than the five-year average.

Domestic grain prices stable, some easing observed in rate of inflation

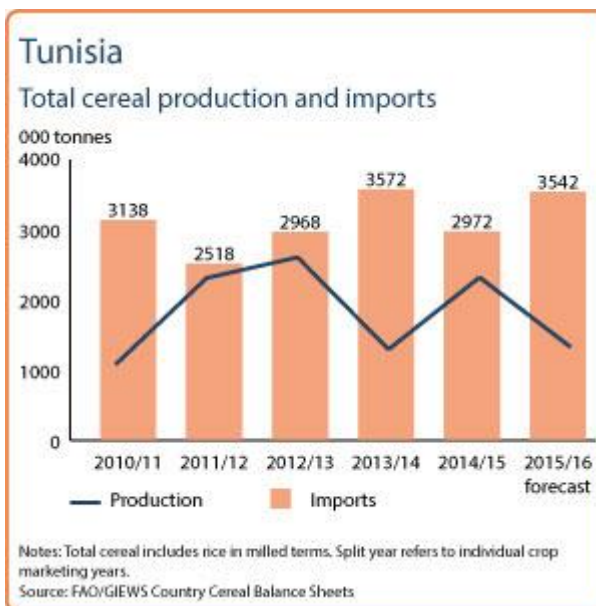
In spite of the country's high import dependency rate, changes in international grain prices do not translate into changes in domestic prices, mainly due to Government subsidies on basic food items. Prices of wheat products, the main staple in the country, are relatively stable, as reflected by the very low inflation of bread and cereals (less than 3 percent on a yearly basis since January 2012). Overall, the food and beverage Consumer Price Index (CPI) in November 2015 recorded



Tunisia Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes		percent	
Wheat	1 338	1 510	913	-40
Barley	557	780	364	-53
Cereals nes	27	30	29	-3
Others	1	1	1	0
Total	1 923	2 321	1 307	-44

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



3.4 percent on a year-on-year basis, compared to over 7 percent in May 2015.

Economic growth slows down again, unemployment rate remains high

The economy was slowly recovering from the 1.8 percent contraction in 2011, reaching about a 2.3 percent growth in 2014. Recent terrorist attacks and their negative impact on the economy, in general, and the hard currency earnings, in particular, together with the slow recovery in the European Union (Tunisia's main trading partner) contributed to a weak growth of about 0.8 percent in 2015.

The unemployment rate remains at a high level (15.2 percent in the first quarter of 2014, a slight decrease from the 19 percent in 2011). Youth unemployment (15-29 year-olds) remains particularly high reaching over 30 percent in 2012.

Reference Date: 08-July-2015

FOOD SECURITY SNAPSHOT

- **Below-average cereal harvest gathered in 2015**
- **Relatively stable domestic grain prices observed**
- **Economic growth slows down again; high unemployment rates, in particular among young people, remains a concern**

Below-average cereal harvest gathered in 2015

The 2015 winter grain harvest in Tunisia concluded at the end of June. Although favourable weather conditions prevailed for the most part of the season, excessively hot weather (up to 45 degrees Celsius) affected the region in early May 2015. Heat-related damages to late developing wheat in early grain-filling stages were reported.

Preliminary estimates of the 2015 cereal production point to a well below-average harvest of 1.4 million tonnes. At this level, the crop is almost 40 percent lower than last year's above-average crop and some 25 percent below the previous five-year average. Most of the grain produced is wheat which in 2015, at about 1.1 million tonnes recorded a decrease of over 37 percent compared to last year's above-average harvest. In Tunisia crop production varies markedly from year to year depending on the significant rainfall variations. Irrigated wheat area represents less than 15 percent of the total wheat area planted.

Tunisia relies heavily on grain imports, mainly wheat, even in good production years. Accordingly, cereal import requirements in the current 2015/16 marketing year (July/June) are put at about 3.9 million tonnes, about 33 percent higher than last year and 30 percent higher than the five-year average.

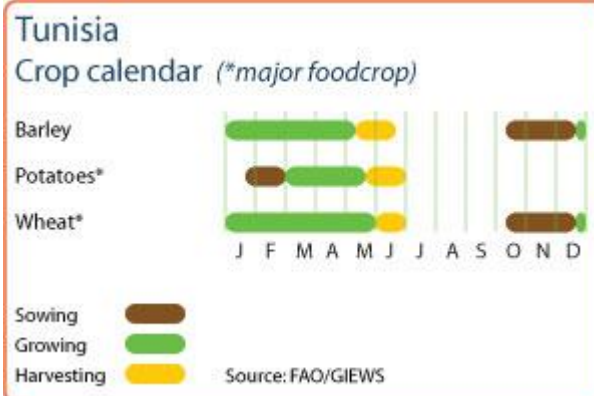
Domestic grain prices stable but some increases observed in rate of inflation

In spite of the country's high import dependency rate, changes in international grain prices do not translate into changes in domestic prices, mainly due to Government subsidies on basic food items. Prices of wheat products, the main staple in the country, are relatively stable, as reflected by the very low inflation of bread and cereals (less than 3 percent on a yearly basis since January 2012). Overall, the food and beverage Consumer Price Index (CPI) in May 2015 recorded 7.5 percent on a year-on-year basis, about the same as last year.

Economic growth slows down again, unemployment rate remains high

The economy was slowly recovering from the 1.8 percent contraction in 2011, reaching about a 2.3 percent growth in 2014. Recent terrorist attacks and their negative impact on the economy, in general, and the hard currency earnings in particular together with the slow recovery in the European Union (Tunisia's main trading partner) contributed to a weak growth of about 1.8 percent in 2015.

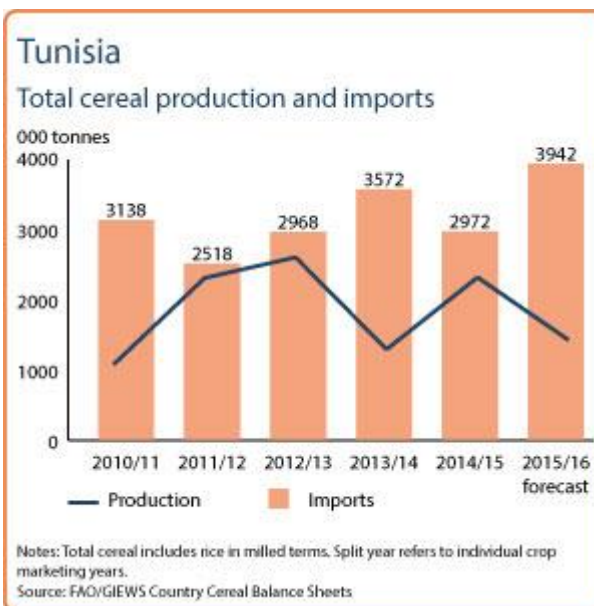
The unemployment rate remains at a high level (15.2 percent in the first quarter of 2014, a slight decrease from the 19 percent in 2011). Youth



Tunisia Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes			percent
Wheat	1 338	1 510	1 100	-27
Barley	557	780	300	-62
Cereals nes	27	30	29	-3
Others	1	1	1	0
Total	1 923	2 321	1 430	-38

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



unemployment (15-29 year-olds) remains particularly high reaching over 30 percent in 2012.

Reference Date: 03-September-2014

FOOD SECURITY SNAPSHOT

- Above average cereal harvest gathered in 2014
- Relatively stable domestic grain prices observed
- Economic growth recovers but high unemployment rates, in particular among young people, remains a concern

Above average cereal harvest gathered in 2014

The 2014 grain harvest in Tunisia concluded in July. Despite lack of rains in December 2013 in the northern part of the country, primarily producing cereals, favourable weather conditions prevailed for the rest of the season providing wheat and barley with sufficient moisture for development. Southern part of the country did not experience a period of dryness. In Tunisia crop production varies markedly from year to year depending on the significant rainfall variations. Irrigated wheat area represents less than 15 percent of the total wheat area planted.

Preliminary estimates of the 2014 cereal production point to a well above average harvest of 2.5 million tonnes. At this level, the crop is almost 90 percent higher than last year's below-average crop and some 25 percent above the previous five-year average. Most of the grain produced is wheat which in 2014, at about 1.7 million tonnes recorded an increase of over 75 percent compared to last year's weather-stricken harvest.

Tunisia relies heavily on grain imports, mainly wheat, even in good production years. Accordingly, cereal import requirements in the current marketing year 2014/15 (July/June) are put at about 2.8 million tonnes, about 20 percent higher than last year and 23 percent higher than the five-year average.

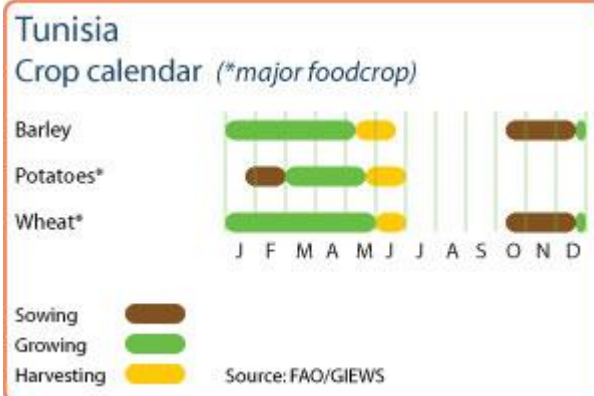
Domestic grain prices stable but some increases observed in the rate of inflation

In spite of the country's high import dependency rate, changes in international grain prices do not translate into changes in domestic prices, mainly due to Government subsidies on basic food items. Prices of wheat products, the main staple in the country, are relatively stable, as reflected by the very low inflation of bread and cereals (less than 3 percent on a yearly basis since January 2012). Overall, the Consumer Price Index (CPI) reached 6 percent in July 2014 on a yearly basis, while the food price inflation reached 8.2 percent.

Economic growth recovers but unemployment rate remains high

The economy is slowly recovering from the 1.8 percent contraction in 2011 to a forecasted growth of about 2.5 percent in 2014. The Tunisian economy is severely affected by the economic and financial difficulties that the countries of the European Union, Tunisia's main trading partners, are going through.

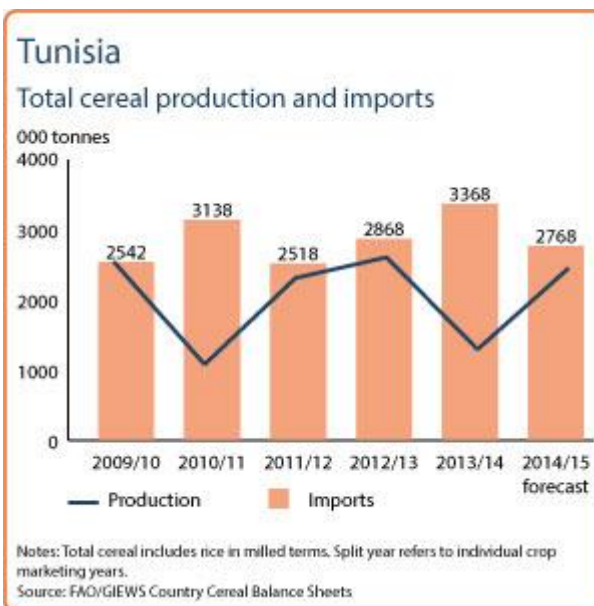
The unemployment rate remains at a high level (15.2 percent in the first quarter of 2014, a slight decrease from the 19 percent in 2011). Youth unemployment (15-29 year-olds) remains particularly high reaching



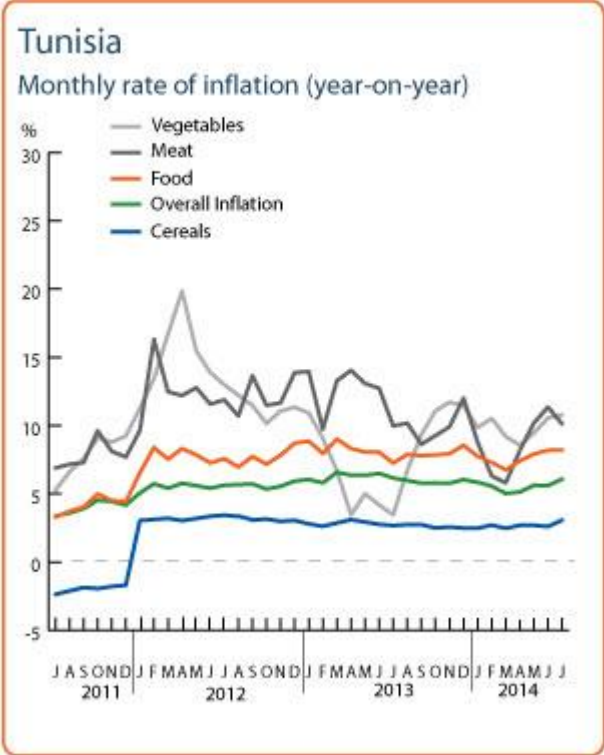
Tunisia Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Wheat	1 366	976	1 720	76
Barley	572	289	700	142
Cereals nes	29	30	30	0
Others	1	1	1	0
Total	1 969	1 296	2 451	89

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



over 30 percent in 2012.



Reference Date: 07-February-2014

FOOD SECURITY SNAPSHOT

- Below average cereal harvest gathered in 2013
- Relatively stable domestic grain prices observed but high meat and vegetable prices contribute to increased inflation
- Economic growth recovers but high unemployment rates, in particular among young people, remains a concern

Planting of winter grains to be harvested from May 2014 is completed. The northern part of the country, primarily producing cereals, has suffered from lack of rains in December. However, return of rains in January has been providing vegetative wheat and barley with sufficient moisture for development. Southern part of the country did not experience a period of dryness. In Tunisia crop production varies markedly from year to year depending on the significant rainfall variations.

Below average cereal harvest gathered in 2013

The 2013 grain harvest in Tunisia suffered from insufficient rain during the planting season in late 2012 resulting in decreased wheat and barley planted area by about 25 percent compared to 2012. The 2013 cereal production reached about 1.3 million tonnes. At this level, the crop was about 50 percent lower than last year's exceptional crop and some 34 percent lower than the previous five-year average. Most of the grain produced is wheat which in 2013 at about 1 million tonnes recorded a decrease of over 40 percent compared to last year.

Tunisia relies heavily on grain imports, mainly wheat, even in good production years. Accordingly, cereal import requirements in the current marketing year 2013/14 (July/June) are put at about 3.4 million tonnes, about 20 percent higher than last year and 23 percent higher than the five-year average.

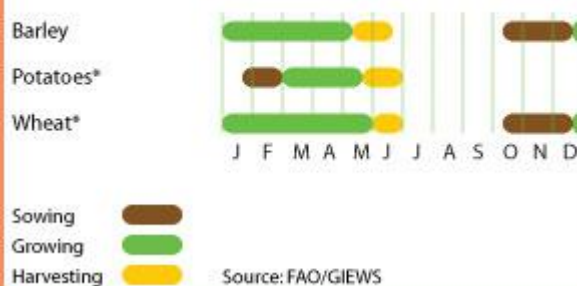
Domestic grain prices stable but some increases observed in the rate of inflation

In spite of the country's high import dependency rate, changes in international grain prices do not translate into changes in domestic prices, mainly due to Government subsidies on basic food items. Prices of wheat products, the main staple in the country, are relatively stable, as reflected by the very low inflation of bread and cereals (less than 3 percent on yearly basis since January 2012). Overall, the consumer price index (CPI) reached 6 percent in December 2013 on yearly basis, while the food price inflation reached 8.55 percent, fuelled by over 10 percent increases in meat and vegetable prices.

Economic growth recovers but unemployment rate remains high

The economy is slowly recovering from the 1.8 percent contraction in 2011 to a forecasted growth of about 3 percent in 2014. The Tunisian economy is severely affected by the economic and financial difficulties that the countries of the European Union, Tunisia's main trading partners, are going through.

Tunisia Crop calendar (*major foodcrop)

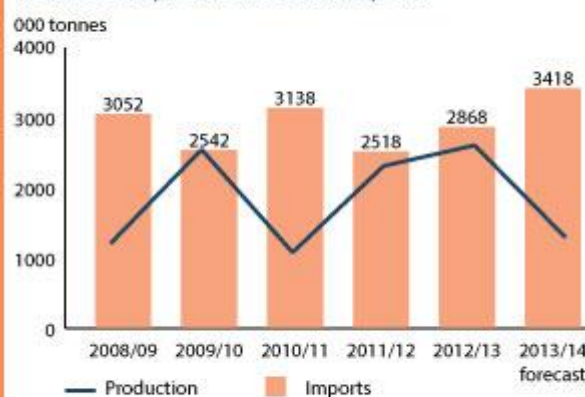


Tunisia Cereal production

	2008-2012 average	2012	2013 estimate	change 2013/2012
	000 tonnes		percent	
Wheat	1,355	1,775	976	-45
Barley	565	800	289	-64
Cereals nes	30	31	30	-3
Others	1	1	1	0
Total	1,952	2,607	1,296	-50

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Tunisia Total cereal production and imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

The unemployment rate remains at high level (15.9 percent in the second quarter of 2013, a slight decrease from the 19 percent in 2011). Youth unemployment (15-29 year olds) remains particularly high reaching over 30 percent in 2012.



Reference Date: 19-August-2013

FOOD SECURITY SNAPSHOT

- Below average cereal harvest gathered in 2013
- Relatively stable domestic grain prices observed but high meat, vegetable oil, and fruit prices contribute to increased inflation
- Economic growth recovers but high unemployment rates, in particular among young people, remains a concern

Below average cereal harvest gathered in 2013

The 2013 grain harvest in Tunisia was concluded in June/July. Insufficient rain during the planting season in late 2012 resulted in decreased wheat and barley planted area by about 25 percent compared to 2012. Irrigated wheat area represents less than 15 percent of total wheat area planted. Accordingly a below average cereal crop was gathered despite the well-distributed rains from mid-January to end of March. In Tunisia crop production varies markedly from year to year depending on the significant rainfall variations.

Preliminary forecasts indicate that the 2013 cereal production reached about 1.4 million tonnes. At this level, the crop is about 47 percent lower than last year's exceptional crop and some 30 percent above the previous five-year average. Most of the grain produced is wheat which in 2013 is forecast at about 1 million tonnes, a decrease of over 40 percent compared to last year. Harvest and post-harvest losses typically represent 10-15 percent of production.

Tunisia relies heavily on grain imports, mainly wheat, even in good production years. Accordingly, cereal import requirements in the current marketing year 2013/14 (July/June) are put at about 3.6 million tonnes, about 30 percent higher than last year and 23 percent higher than the five-year average.

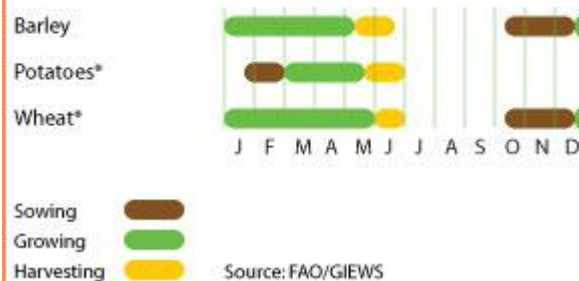
Domestic grain prices stable but some increases observed in the rate of inflation

In spite of the country's high import dependency rate, changes in international grain prices do not translate into changes in domestic prices, mainly due to Government subsidies on basic food items. Prices of wheat products, the main staple in the country, are relatively stable, as reflected by the very low inflation of bread and cereals (less than 3 percent on yearly basis in July 2013). Overall, the consumer price index (CPI) reached 6.15 percent in July 2013 on yearly basis, while the food price inflation reached 7.25 percent, fuelled by over 10 percent increases in meat, vegetable oil and fruit prices.

Economic growth recovers but unemployment rate remains high

The economy is slowly recovering from the 1.8 percent contraction in 2011 to a growth of about 3.5 percent in 2013. Strong performances from the agricultural, services, mining and energy sectors have contributed to the recovery. The Tunisian economy is severely affected by the economic and financial difficulties that the countries of the European Union, Tunisia's main trading partners, are going through.

Tunisia Crop calendar (*major foodcrop)

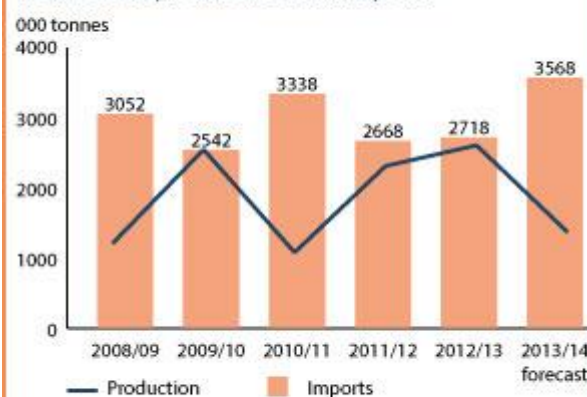


Tunisia Cereal production

	2008-2012 average	2012	2013 estimate	change 2013/2012
	000 tonnes		percent	
Wheat	1 355	1 775	1 020	-43
Barley	565	800	320	-60
Cereals nes	30	31	30	-3
Others	1	1	1	0
Total	1 952	2 607	1 371	-47

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

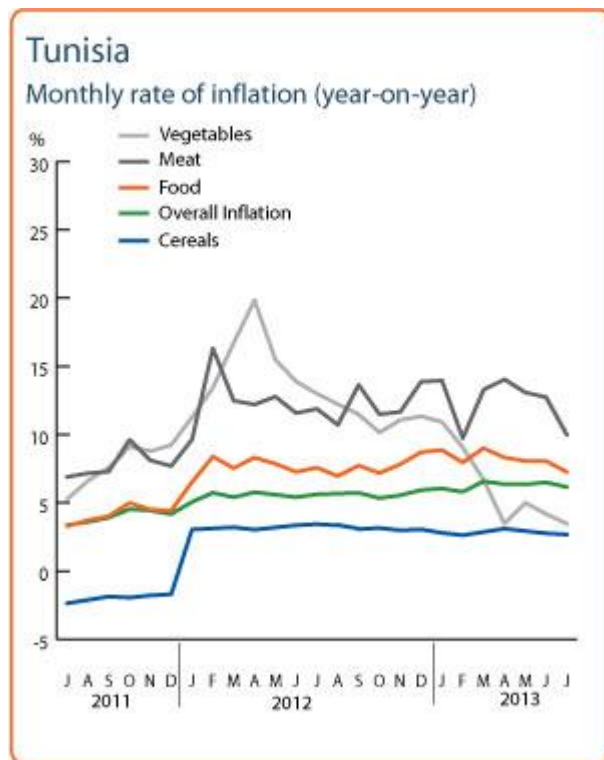
Tunisia Total cereal production and imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Tunisia has suffered a worsening of its trade deficit over the first half of 2013. As of end of July 2013, the level of foreign currency reserve corresponded to 104 days of imports.

The unemployment rate remains at high level (15.9 percent in the second quarter of 2013, a slight decrease from the 19 percent in 2011). Youth unemployment (15-29 year olds) remains particularly high reaching over 30 percent in 2012. The Government is seeking external assistance and loans in order to support economic growth and reduce regional disparities in the country. The IMF approved a USD 1.7 billion stand-by arrangement in June 2013.



Reference Date: 10-December-2012

FOOD SECURITY SNAPSHOT

- Above average cereal harvest gathered in 2012
- Relatively stable domestic grain prices observed but high meat and vegetable prices contribute to increased inflation
- Economic growth recovers but high unemployment rates, in particular among young people, remains a concern

The winter cropping season has begun under generally favourable conditions

The new crop year (2012/13) started with above normal rainfall in September and October, albeit with moisture concentrated in a few days. Above average rainfall contributed to recovery of water reserves, improved topsoil moisture and encouraged early winter grain planting, for harvest from May/June 2013. For the current crop year, the government decided to maintain the seed and fertiliser prices at the levels of the previous year while subsidy rates were revised to reflect an increased cost of fuel and labour.

Elsewhere, adult groups of locust moved north to southern Tunisia in November. Scattered adults and groups may appear in the south during periods of warm southerly winds.

Above average cereal harvest gathered in 2012

The 2012 cereal production reached over 2.6 million tonnes. At this level, the crop is about 13 percent higher than last year's already above average crop and some 40 percent above the previous five years average. Most of the grain produced is wheat: the 2012 wheat crop was almost 1.8 million tonnes, an increase of about 11 percent compared to last year. However, in Tunisia crop production varies markedly from year to year depending on significant rainfall variations. Harvest and post-harvest losses typically represent 10 – 15 percent of production.

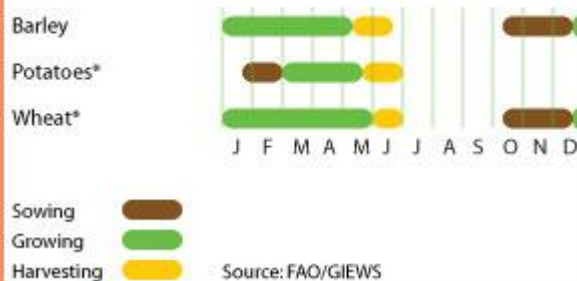
Tunisia relies heavily on grain imports, mainly wheat, even in good production years. Accordingly, cereal imports (mainly wheat) in the current marketing year 2012/13 are forecast at about 2.6 million tonnes, about the same as last year and 15 percent less than the five-year average.

Domestic grain prices stable but some increases observed in the rate of inflation

In spite of the country's high import dependency rate, the rise in international grain prices has not translated into high domestic prices, mainly due to Government subsidies on basic food items. Prices of wheat products, the main staple in the country, are relatively stable, as reflected by very low inflation of bread and cereals (3 percent on yearly basis in November 2012). Overall, the consumer price index (CPI) reached 5.55 percent in November 2012 on yearly basis, while the food price inflation reached 7.8 percent, fuelled by over 10 percent increases in meat and vegetable prices.

Economic growth recovers but unemployment rate

Tunisia Crop calendar (*major foodcrop)

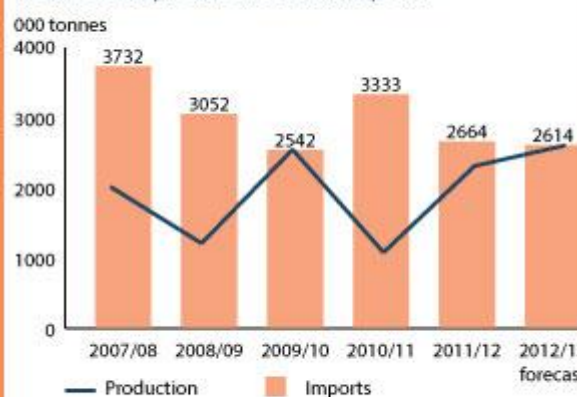


Tunisia Cereal production

	2007-2011 average	2011	2012 estimate	change 2012/2011
	000 tonnes			percent
Wheat	1,288	1,605	1,775	11
Barley	512	681	800	17
Cereals nes	31	25	31	24
Others	1	1	1	0
Total	1,833	2,312	2,607	13

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Tunisia Total cereal production and imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

remains high

The economy is slowly recovering from the 1.8 percent contraction in 2011 to a growth of about 3 percent in the first nine months of 2012. Strong performances from the agricultural, services, mining and energy sectors have contributed to the recovery. The forecast for the full year of 2012 is put at 2.7 percent while a growth of 3.3 percent is expected in 2013 anticipating a recovery in tourism revenues and renewed flows of foreign direct investments.

The Tunisian economy is severely affected by the economic and financial difficulties that the countries of the European Union, Tunisia's main trading partners, are going through.

The unemployment rate remains at high level (so far 17.6 percent in 2012, a slight decrease from 19 percent in 2011). Youth unemployment (15-29 year olds) remains particularly high reaching 35.6 percent in the first trimester of 2012. The Government is seeking external assistance and loans in order to support economic growth and reduce regional disparities in the country. One such loan amounting to Euro 387.6 million was granted from the African Development Bank in the autumn of 2012.



Reference Date: 07-August-2012

FOOD SECURITY SNAPSHOT

- Above average cereal harvest is gathered
- Relatively stable domestic grain prices observed but high meat and vegetable prices contribute to increased inflation
- Food supply difficulties eased following the return of refugees to their home countries but high unemployment rates, in particular among young people, remains a concern

Above average cereal harvest gathered in 2012

The grain harvest in Tunisia has been completed by last July. Even though earlier projections of a record harvest of 2.5 million tonnes of grain did not materialize, the total cereal harvest of 2.28 million tonnes remains above average and is only slightly (by 1.42 percent) lower than last year's bumper crop. In Tunisia crop production varies markedly from year to year depending on the outturn of the huge rainfall variations. The loss in production this year is attributable to floods in February following heavy rainfalls combined with the runoff from snowfalls which destroyed about 14 000 hectares of grain in the most productive northwest part of the country (Beja, Bizerte and Jendouba). Total wheat production in 2012 decreased by 5 percent compared to its 2011 level while barley production increased by 6 percent.

Domestic grain prices stable but some increases observed in the rate of inflation

Tunisia relies heavily on grain imports, mainly wheat, even in good production years. Accordingly, the level of imports in the current 2012/13 (July/June) marketing year is anticipated to be slightly higher than last year given the slight reduction in domestic production.

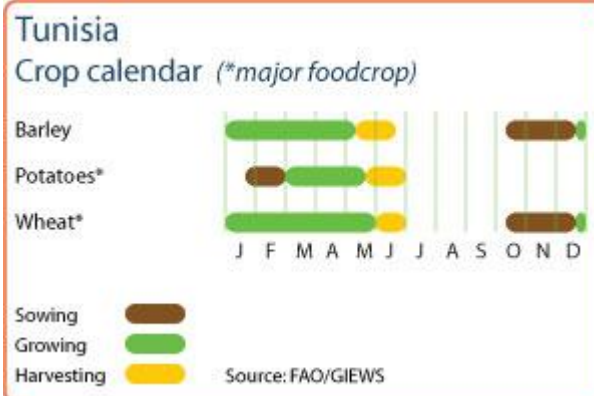
In spite of the country's high import dependency rate, the rise in international grain prices has not translated into high domestic prices, mainly due to Government subsidies on basic food items. Prices of wheat products, the main staple in the country, are relatively stable, as reflected by very low inflation of bread and cereals. Nevertheless, in 2012, the food price inflation increased to about 8 percent in response to higher meat and vegetable prices. Overall, the consumer price index (CPI) increased by 0.6 percent in July 2012 compared to June 2012 but remained around 5 percent in 2012.

The Government has set price ceilings for various products (potatoes, dates, lemons, some types of meats and eggs) during the Ramadan fasting month in an effort to ease the inflationary pressure.

Refugees returned to their home country but unemployment rate remains high

Last year's influx of refugees and returnees from Libya significantly constrained food supplies at border camps. Following the return of the refugees to their home countries and the easing of food difficulties, the WFP closed its operation in southern Tunisia in February 2012.

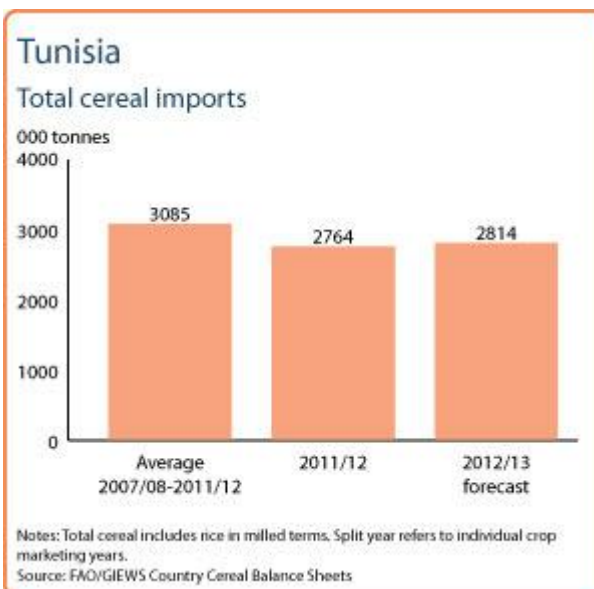
The economy is slowly recovering from the contraction of about 1.8 percent in 2011, with a growth of about 2 percent in the first trimester of



Tunisia Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes		percent	
Wheat	1 288	1 605	1 523	-5
Barley	512	681	724	6
Cereals nes	31	25	31	24
Others	1	1	1	0
Total	1 833	2 312	2 279	-1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



2012. The forecast for the full year of 2012 is put at 2.2 percent.

The unemployment rate in the first trimester was 18.1 percent, a slight decrease from 18.9 percent in the last trimester of 2011. Youth unemployment (those aged 15-29 years) remains particularly high reaching 35.6 percent in the first trimester of 2012.

A Protracted Relief and Recovery Operation (PRRO) by WFP and FAO to Disadvantaged Rural Communities Affected by Food Insecurity is currently underway. Cash-for-work and junior farmer field and life schools are expected to contribute to addressing both unemployment and food security problems.



Reference Date: 22-March-2012

FOOD SECURITY SNAPSHOT

- Early prospects are favourable for 2012 winter cereal crops
- Relatively stable domestic prices despite high international food prices.

Early prospects are favourable for winter crops.

Planting of the winter cereals for harvesting from June 2012 is complete. Crops are at varying stages of development and have benefited from normal to abundant rains since the beginning of the growing season in October 2011. Early prospects are generally good provided normal weather conditions continue.

In 2011, cereal production was estimated at 2.3 million tonnes, more than double the 2010 crop and 36 percent up compared to the previous five years' average. Wheat output dropped by about 50 percent in 2010 before rebounding by 95 percent in 2011.

In Tunisia crop production varies markedly from year to year depending on the outturn of the huge rainfall variations.

Domestic prices remain stable commodities in spite of high international prices.

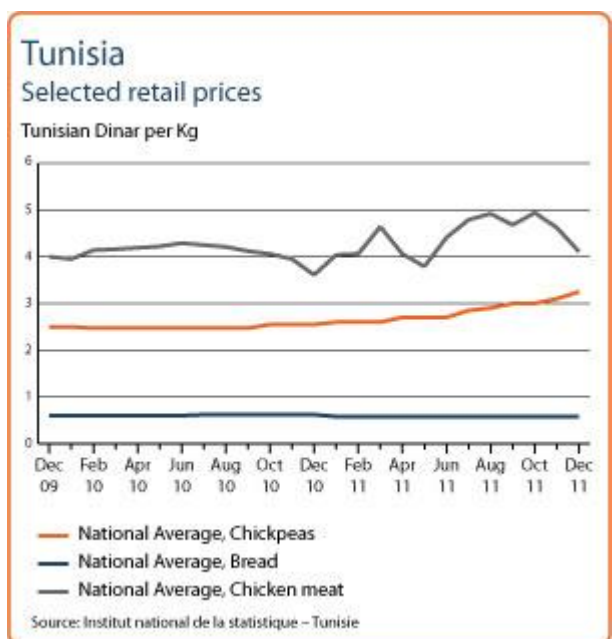
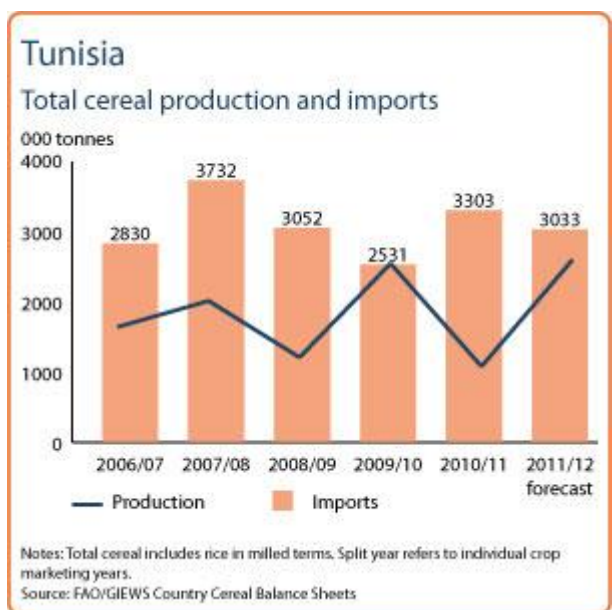
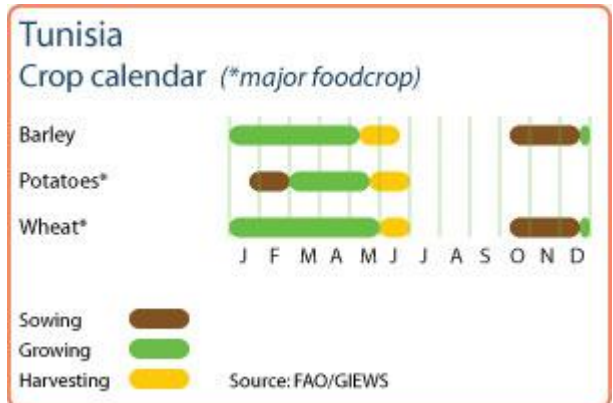
Tunisia relies heavily on wheat imports. Given the low level of 2010 cereal crop, the wheat import is estimated at around 2 million tonnes in the 2010/11 (July/June) marketing year, a level much higher than in the previous marketing year. Level of imports in the current 2011/12 (July/June) marketing year is anticipated to be slightly lower, reflecting last year's good harvest.

In spite of the country's high import dependency rate, the rise in international food prices has not translated into high domestic prices due to Government intervention aimed at maintaining subsidies on basic food items. Prices of wheat products, the main staple in the country, are relatively lower and stable. For instance, in December 2011, prices of bread were 8 percent lower than in the same month of the previous year. However, the rate of inflation rose during the second half of the year, driven by higher vegetable prices. For instance, price of chickpeas increased by 27 percent in December 2011 compared to December 2010.

Influx of refugees and returnees put pressure on food supplies

The influx of refugees and returnees from Libya (more than 345 000 people as of late November 2011) has significantly constrained food supplies at border camps. The majority of the people who fled to Tunisia were third countries nationals (about 60 percent) although the flow of Tunisians workers from Libya was also significant. As of 27 November 2011 the number of returnees was estimated at about 137 000 persons.

A regional Emergency Operation (EMOP), initially envisaged for a three month period (March-May), has been extended for 9 months (June



2011-February 2012). The extension allowed the support of about 1.6 million beneficiaries.

Reference Date: 21-October-2011

FOOD SECURITY SNAPSHOT

- Favourable outturn of the wheat harvest in 2011
- Relatively stable domestic prices despite high international food prices.
- Growing number of refugees from Libya

A good cereal harvest was gathered in 2011

Planting of the winter cereal crops, mainly wheat and barley, has started for harvest in the spring 2012.

Favourable weather conditions, larger area sown and adequate availability of agricultural inputs resulted in a good 2011 cereal production. Wheat production in 2011 is estimated at about 1.8 million tonnes, more than double last year's drought-affected crop.

Tunisia is a food-deficit country where agricultural production fluctuates markedly from year to year due to weather variations. Following a notable recovery in 2009, wheat output dropped by about 50 percent in 2010 compared to the previous year, and 35 percent compared to the five-year average. Last year saw the lowest production level of the past eight years.

High international food prices did not translate into high inflation rate nationally

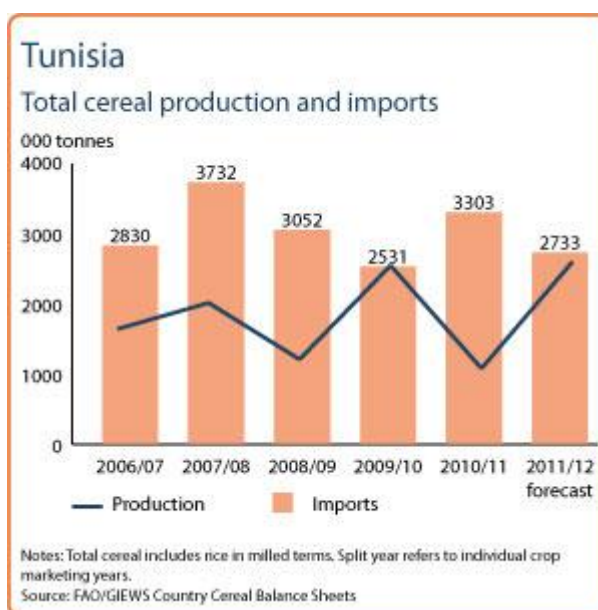
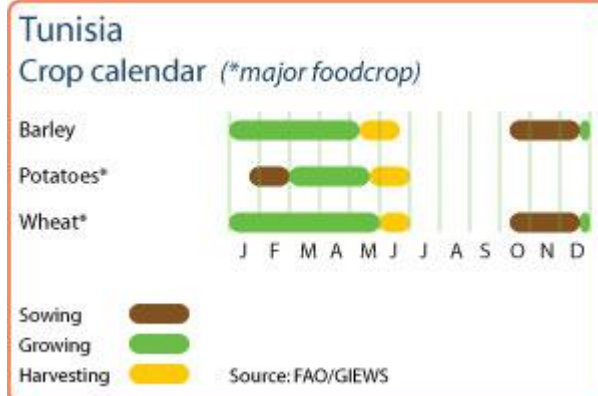
Tunisia relies heavily on wheat imports. Given the low level of 2010 cereal crop, the wheat import is estimated at around 2 million tonnes in the 2010/11 (July/June) marketing year, a level much higher than in the previous marketing year. Import is anticipated to be slightly lower in 2011/12 (July/June), reflecting this year's good harvest.

In spite of the country's high import dependency rate, the hike in international food prices has not translated into high domestic prices due to interim Government intervention aimed at maintaining subsidies on basic food items. The inflation rate in the food sector remained mostly stable in the first half of 2011. In September, the year-on-year inflation rate (in the food sector) was around 4 percent.

Influx of refugees and returnees puts pressure on food supplies

Rising numbers of refugees and returnees from Libya (more than 324 000 people as of mid-October), put high pressure on food supplies at border camps. The majority of the people fleeing to Tunisia are third countries nationals (about 64 percent). However, the flow of Tunisians workers from Libya has also continued and as of 13 October 2011 are estimated at about 116 000 individuals.

A regional Emergency Operation (EMOP) initially envisaged for a three month period (March-May), has been extended for 9 months (June 2011-February 2012). The extension will allow it to support 1 597 500 beneficiaries overall.



Reference Date: 12-August-2011

FOOD SECURITY SNAPSHOT

- Favourable outturn of the wheat harvest in 2011
- Relatively stable domestic prices despite high international food prices.
- Growing number of refugees from Libya

A good cereal harvest is in prospect

Harvesting of 2011 winter cereals (wheat and barley) have been completed in June under adequate climatic conditions. Abundant rains, especially in May, boosted yields and improved crop prospects in main producing zones. Wheat production in 2011 is forecast at about 1.8 million tonnes, more than double last year's drought-affected crop.

Tunisia is a food-deficit country where agricultural production fluctuates markedly from year to year due to weather variations. Following a notable recovery in 2009, wheat output dropped by about 50 percent in 2010 compared to the previous year, and 35 percent compared to the five-year average. Last year saw the lowest production level of the past eight years.

High international food prices did not translate into high inflation rate nationally

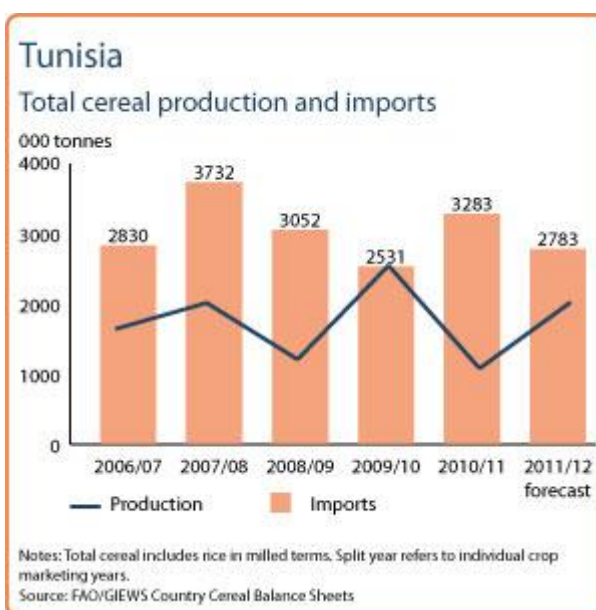
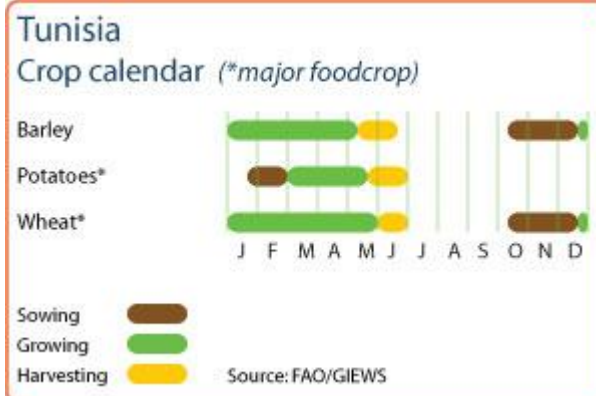
Tunisia relies heavily on wheat imports. Given the low level of 2010 cereal crop, the wheat import is estimated at around 2 million tonnes in the just ended 2010/11 (July/June) marketing year, a level much higher than in the previous marketing year. Furthermore, given the good prospects for the 2011 crops, import requirements for the current 2011/12 marketing year are anticipated to be lower than the previous marketing year.

So far, however, the hike in international food prices has not translated into high domestic prices due to interim Government intervention aimed at increasing subsidies on basic food items. The inflation rate in the food sector remained mostly stable in the first half of 2011. In June, the year-on-year inflation rate (in the food sector) was around 3 percent.

Influx of refugees and returnees puts pressure on food supplies

Rising numbers of refugees and returnees from Libya (more than 280 000 people as of 7 August), put increasing pressure on food supplies at border camps. The bulk of the refugees are Libyans, estimated at around 180 000. On the other hand, the Third Countries Nationals (TCNs) - mostly from Sub-Saharan Africa - are estimated at around 1 400 persons, as of early August, and are utilizing border area as transitory sites. The flow of Tunisians workers from Libya has continued and as of 7 August 2011 are estimated at about 79 000 individuals.

A regional Emergency Operation (EMOP) initially envisaged for a three month period (March-May), has been extended for another three months (June-August). The EMOP is currently providing assistance to more than 1.5 million most affected people by the civil strife in Libya,



Tunisia and Egypt. As of end of July, WFP has so far mobilized over 32 000 metric tonnes of food.

Reference Date: 25 May-2011

FOOD SECURITY SNAPSHOT

- A recovery in cereal production is expected this year due to improved weather conditions.
- Relatively stable domestic prices despite high international food prices.
- Growing number of refugees from Libya

Cereal production forecast to recover following improved weather conditions

Planting of the winter cereals for harvest from June 2011 were completed under adequate climatic conditions. Although insufficient rains affected crops in parts of the country in January and February, increased precipitation from March boosted yields and improved crop prospects in main producing zones. Moreover, prior to the current political crisis, the Government has increased its support to the agricultural sector mostly through distribution of improved seeds and debt rescheduling for farmers affected by last year's drought and poor harvest. Wheat production in 2011 is forecast at about 1.7 million tonnes, more than double last year's drought-affected crop.

Tunisia is a food-deficit country where agricultural production fluctuates markedly from year to year due to weather variations. Following a notable recovery in 2009, wheat output dropped by about 50 percent in 2010 compared to the previous year, and 35 percent compared to the five-year average. This was the lowest production level of the past eight years.

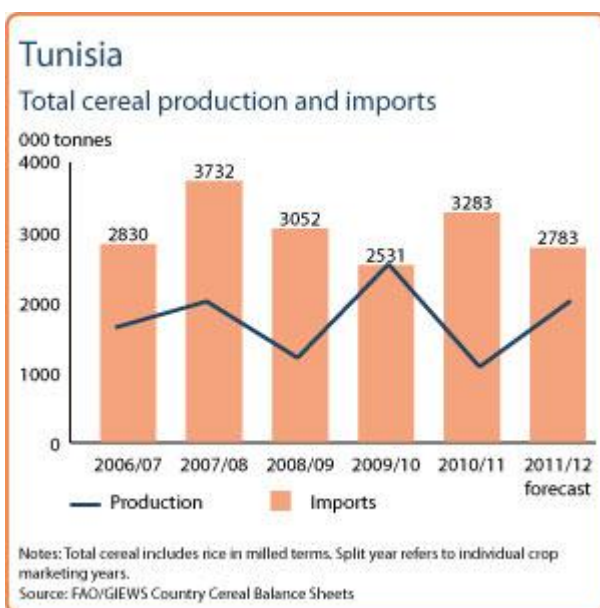
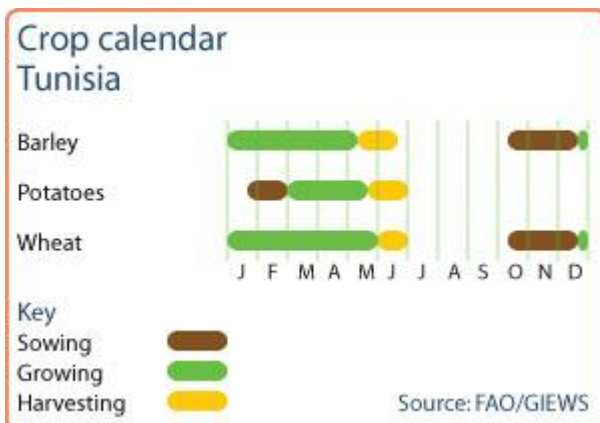
High international food prices did not translate into high inflation rate nationally

Tunisia relies heavily on wheat imports. In spite of the good crop gathered in 2009, the country imported about 1.4 million tonnes of wheat, 47 percent of its domestic utilization, in the 2009/10 (July/June) marketing year. Import levels are anticipated to be much higher during 2010/11, due to last year's reduced crop.

So far, however, the hike in international food prices has not translated into high domestic prices due to Government intervention. The inflation rate in the food sector remained mostly stable in the first quarter of 2011. The year-on-year inflation rate (in the food sector) was 3 percent in April 2011.

Massive influx of refugees and returnees put pressure on food supplies

Rising numbers of refugees and returnees from Libya (285 000 people as of mid May), put increasing pressure on food supplies at border camps. A large number of refugees, besides Libyan, are third country nationals (mostly from Sub-Saharan Africa) and are utilizing border area as transitory sites. A regional Emergency Operation (EMOP) is currently underway, distributing food to about 1.06 million people most affected by civil strife in Libya, Tunisia and Egypt over a period of three months (March-May).



Reference Date: 31-January-2011

FOOD SECURITY SNAPSHOT

- Cereal production is expected to recover in 2011 due to improved rainfall
- Relatively stable domestic prices despite high international food prices

Cereal production forecast to recover following improved weather conditions

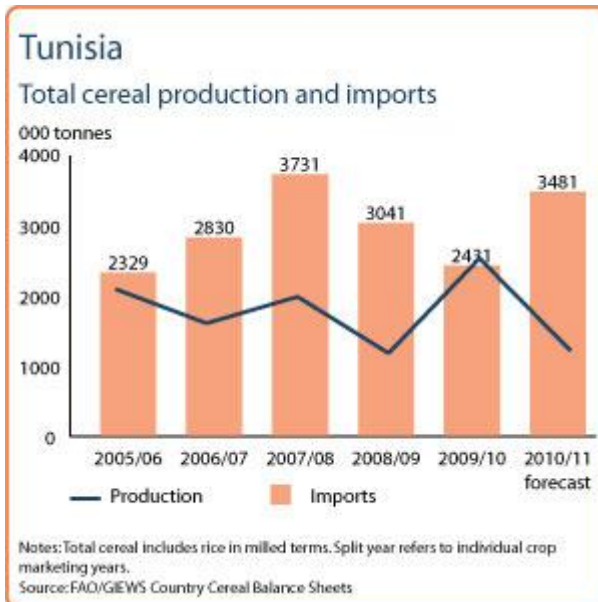
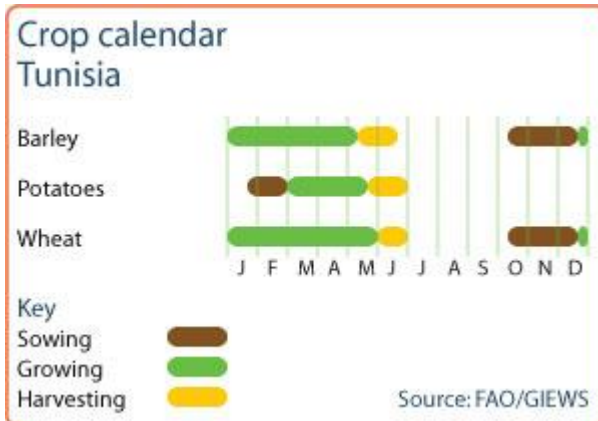
Early prospects for the 2011 winter wheat and coarse grain crops, to be harvested from around June, are favourable. Rainfall has been generally adequate to meet crops' water requirement since the beginning of the growing season, allowing satisfactory crop development in main producing zones. Moreover, prior to the current political crisis, the Government has increased its support to the agricultural sector mostly through distribution of improved seeds and debt rescheduling for farmers affected by last year drought and poor harvest.

Tunisia is a food-deficit country where agricultural production fluctuates markedly from year to year due to weather variations. Following a notable recovery in 2009, wheat output dropped by about 46 percent in 2010 compared to the previous year, and 35 percent compared to the five-year average. This was the lowest production level of the past eight years.

High international food prices did not translate into high inflation rate at national level

Tunisia relies heavily on wheat imports from the international market to cover its consumption needs. In spite of the good crop gathered in 2009, the country imported about 1.4 million tonnes of wheat, 47 percent of its domestic utilization, in the 2009/10 (July/June) marketing year. Import levels are anticipated to be much higher during 2010/11, due to last year's reduced crop. Consequently, the recent sharp rises in food prices have raised serious concerns over the food supply outlook in the country.

So far, however, the hike in international food prices has not translated into high domestic prices. The consumer price index of food declined slightly from 131 to 129.9 between November and December 2010. The year-on-year inflation rate in the food sector was estimated at 4.8 percent in December 2010. Nonetheless, the country's food import bill is expected to increase significantly.



Reference Date: 17-October-2010

FOOD SECURITY SNAPSHOT

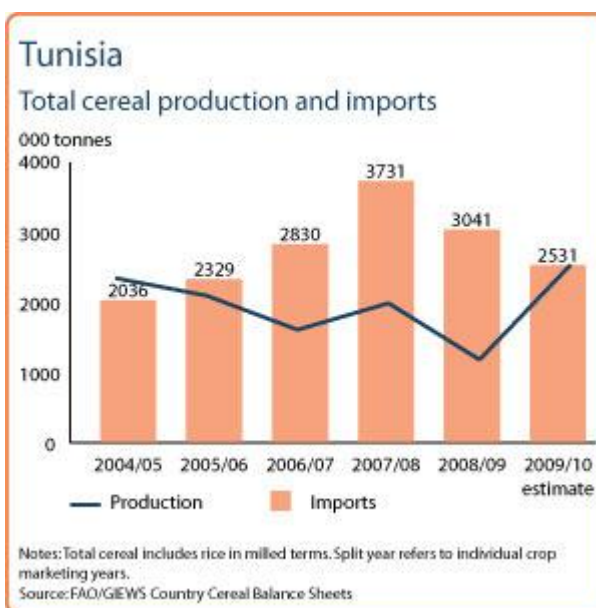
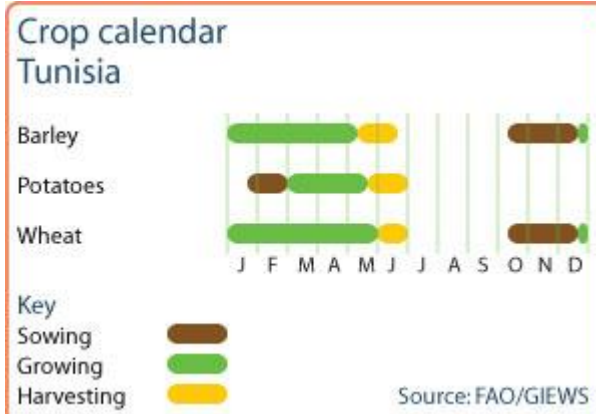
- Cereal production dropped sharply in 2010 due to inadequate rains
- High international wheat prices will affect food import bill

Lower cereal production following delayed seasonal rains

Planting of the winter cereals (wheat and barley) for harvesting from June 2011 has only started under normal weather conditions. Harvesting of the 2010 winter crops was completed in July. Production is estimated to have declined sharply, due to below-normal rains in November and December 2009, which has led to a decline in planted area. Wheat output dropped by about 45 percent compared to 2009 and 35 percent compared to the five year-average, the lowest level of the past eight years.

High international wheat prices will lead to higher food import bill

Tunisia relies heavily on wheat imports from the international market to cover its consumption needs. In spite of last year good crop, the country imported about 1.4 million tonnes of wheat, 47 percent of its domestic utilization, in the 2009/010 marketing year. Import level is anticipated to be much higher during 2010-11, due to this year's reduced crop. Consequently, the recent Russian ban on wheat exports and subsequent sudden sharp rises in prices has raised serious concerns over the food supply outlook in the country. Although Tunisia imports limited quantity from Russia, the country's food import bill will increase significantly.



Reference Date: 19-April-2010

FOOD SECURITY SNAPSHOT

- Prospects for the 2009/10 winter cereal crops are uncertain due to inadequate rains since the beginning of the cropping season
- Wheat imports are forecast to decline in 2009/10

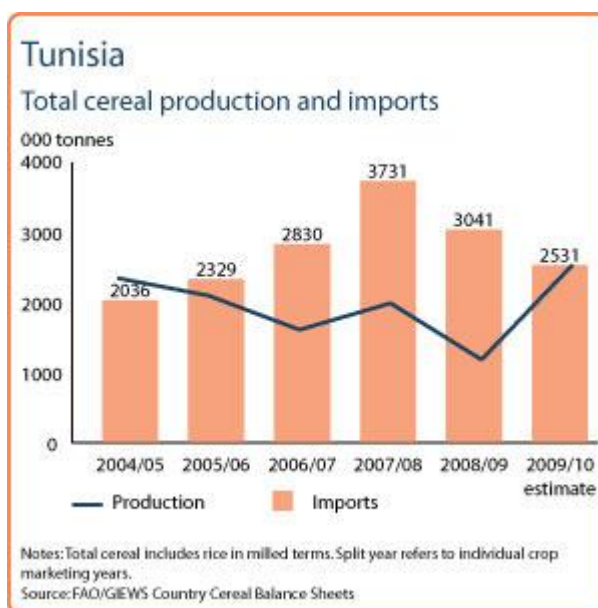
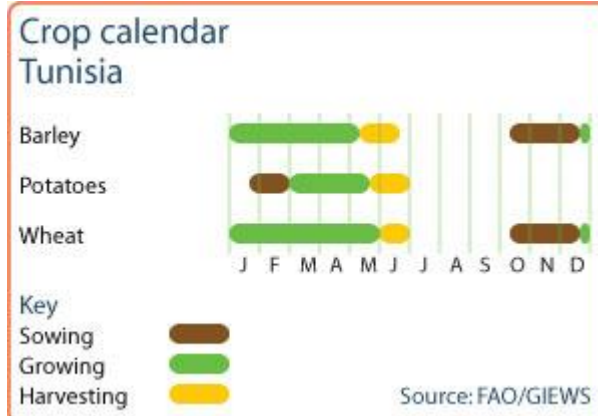
Crop prospects uncertain due to inadequate rains

Early prospects for the 2010 winter wheat and coarse grain crops, to be harvested from around June, are uncertain. Land preparation and plantings were delayed by below-normal rains in November and December, which has led to a drop in planted area. About 1.30 million hectares have been planted to wheat and barley by late February, which is 7 percent lower than in the previous year. Moreover, precipitation has been irregular in January and February, which is likely to affect yields. Improved rains in the next few weeks will be crucial to allow crops to recover and avoid further loss of yield potential.

Wheat imports forecast to decline in 2009/10 following a good 2009 harvest

Poor rainfall and low yields have kept production low in recent years but the 2009 cereal output was 19 percent above average.

Consequently, imports of wheat in 2009/10 (July/June) are forecast to drop by some 300 000 tonnes to about 1.5 million tonnes.



Reference Date: 29-January-2010

FOOD SECURITY SNAPSHOT

- Prospects for the 2009/10 winter cereal crops are uncertain due to inadequate rains in November and December
- Wheat imports are forecast to decline in 2009/10

Crop prospects uncertain due to inadequate rains at the beginning of the season

Planting of the 2009/10 wheat and barley crops has been affected by below-normal precipitation in November and December, which is likely to affect planted area. It is anticipated that some 1.4 million hectares will be sown to cereals, mainly wheat, about the same as the previous year's reduced level. Harvesting will start in June and below-average outputs are tentatively forecast.

Wheat imports forecast to decline in 2009/10 following a good 2009 harvest.

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