



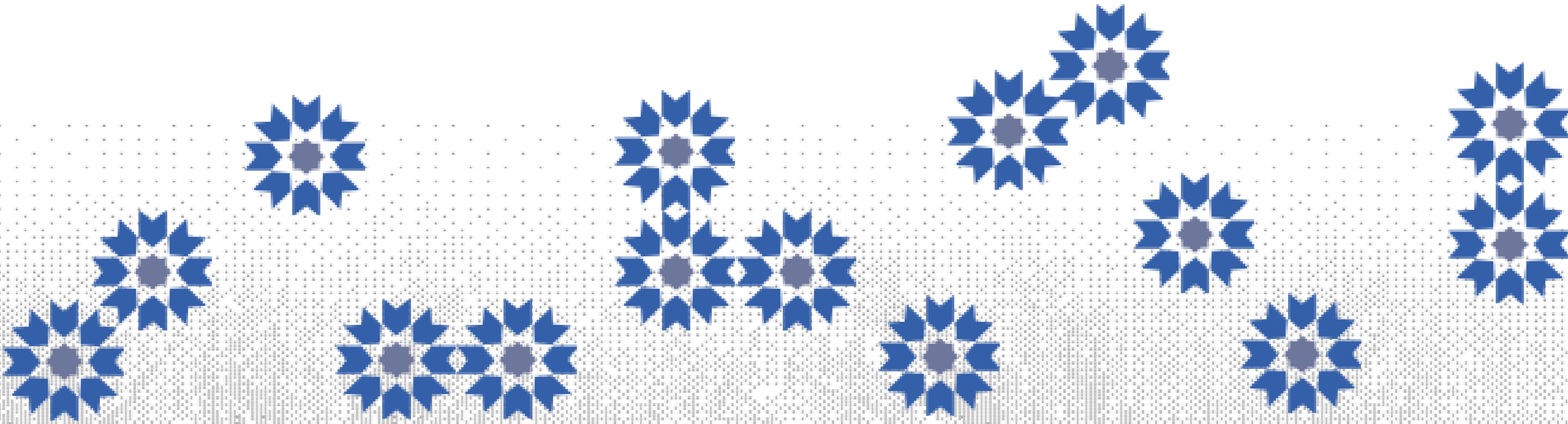
Food and Agriculture  
Organization of the  
United Nations



European Bank  
for Reconstruction and Development

# **EBRD/FAO technical cooperation package to support food security in the SEMED region**

Key trends in the agrifood sector in Tunisia



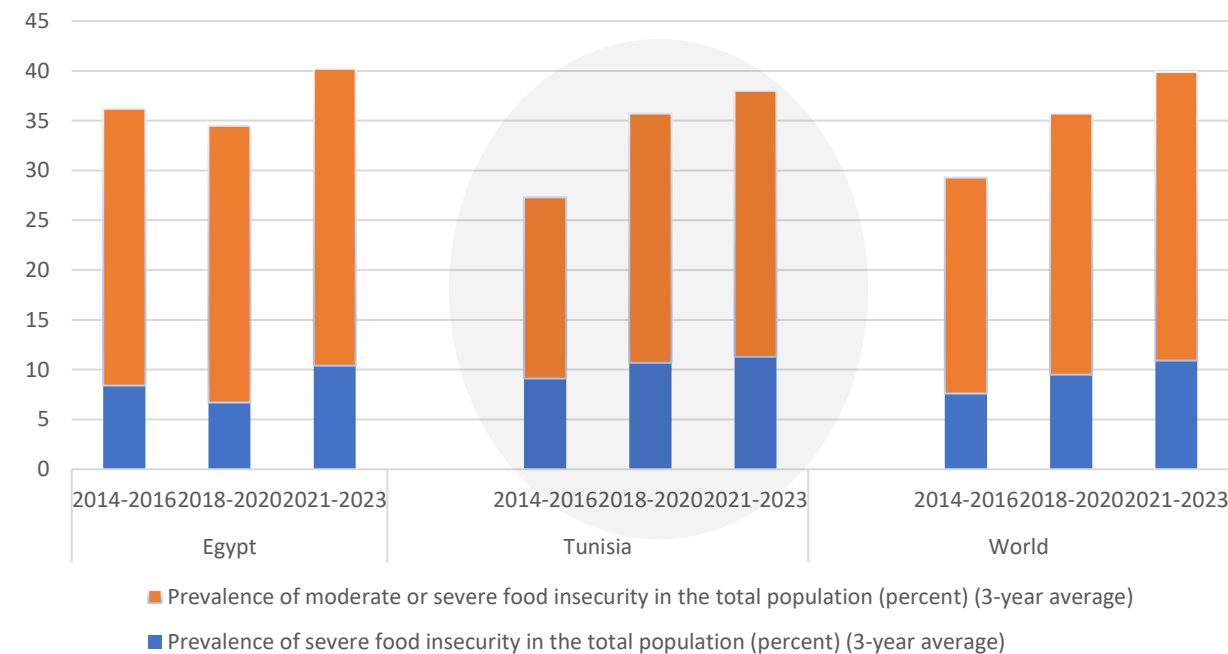
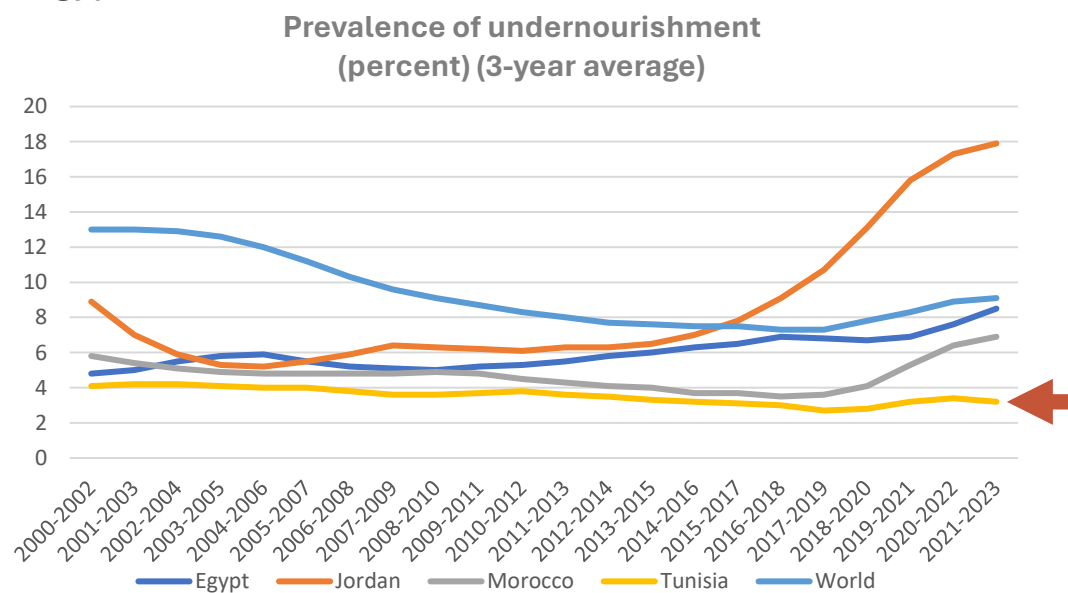


## Overview

- Updates on food insecurity and malnutrition in Tunisia
- Local agrifood systems for improved agricultural productivity and food security
- Agricultural trade: focusing on resilience to ensure food and nutrition security for all
- Policy strategic direction

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

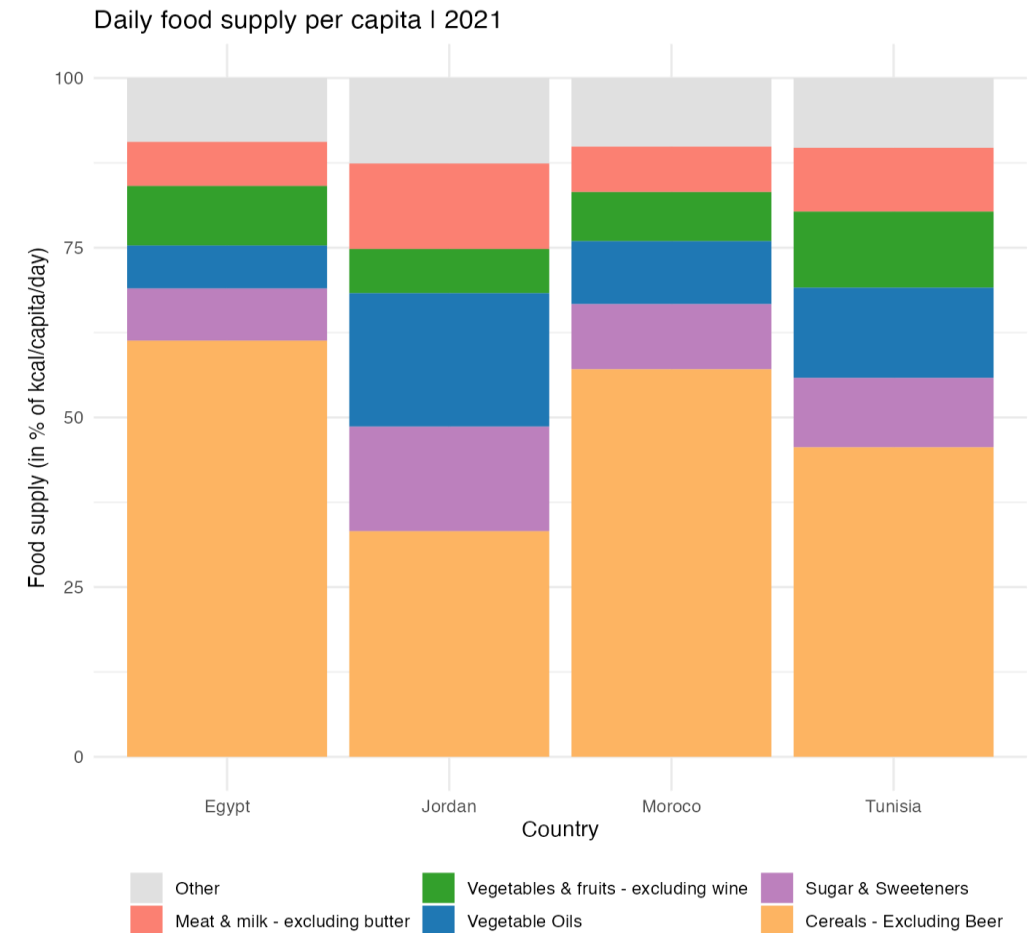
- Sustained economic growth triggered nutrition transition, reducing malnourishment and leading shift in consumption patterns towards greater dietary diversity.
- Obesity among adults in Morocco increased from 16.7% in 2012 to 21.8% in 2022, though level is lower than other three countries. Projections indicate that adult obesity will continue to increase through 2035.
- Cereals account for 57% of dietary energy intake in Morocco, higher than in Jordan and Tunisia but slightly lower than in Egypt.



Source: FAO STAT, SOFI, 2024

# Sustained economic growth triggered the nutrition transition, shifting consumption patterns towards greater dietary diversity as well as increasing child overweight and adult obesity

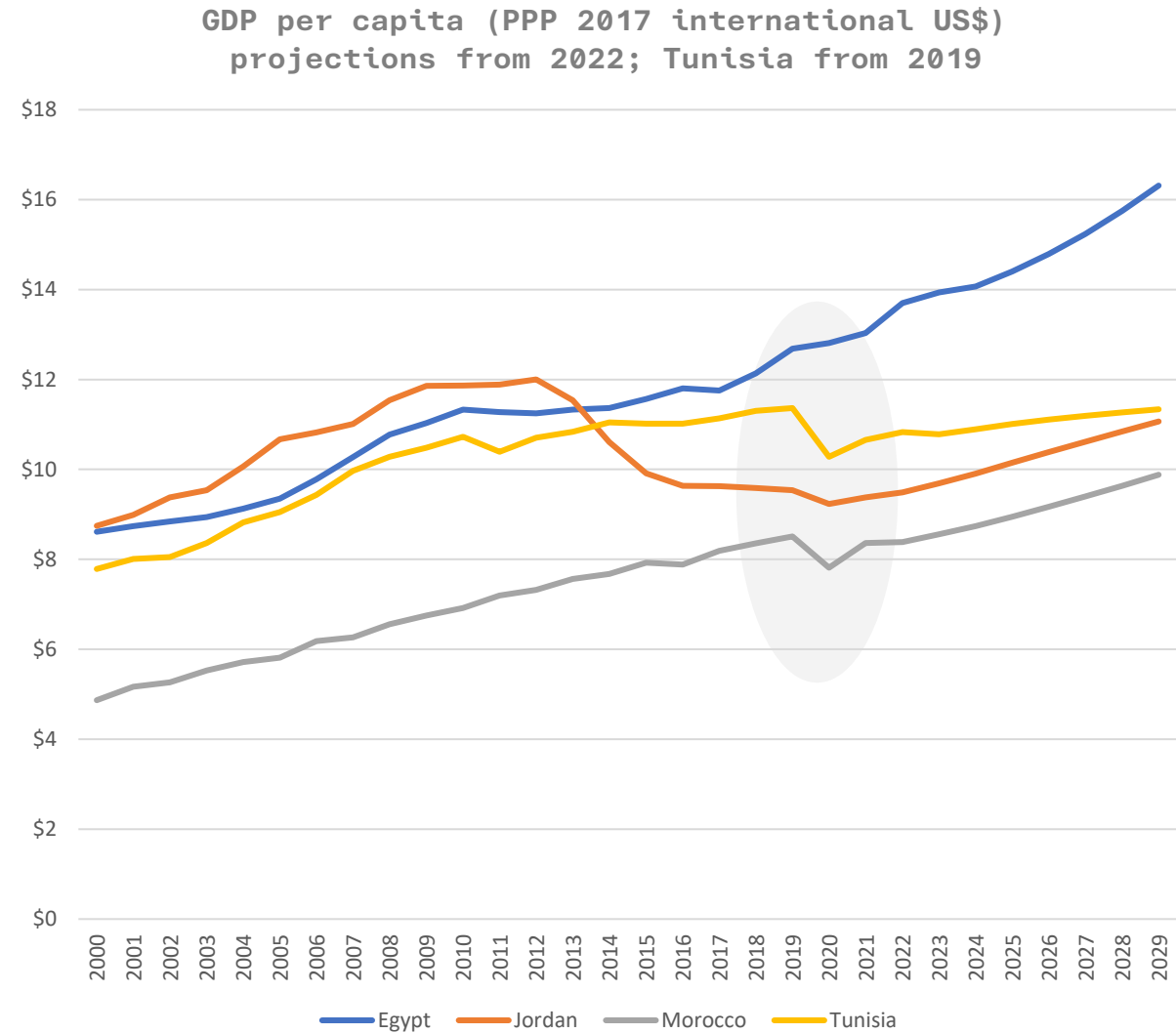
- Tunisia saw greatest increase in overweight children under five, reaching 19% in 2022 (higher than Egypt, Jordan and Morocco).
- Obesity among adults in Tunisia increased reaching 26.8% in 2022, and projections indicate that will continue to increase through 2035.
- Cereals contribute over 50% of dietary energy intake in the region, with 46% in Tunisia.



Source: FAO. 2023



- Tunisia was hit hard by COVID-19 and growth is recovering more slowly compared to the other countries.
- Poverty in Tunisia, different than other countries in the region, has remained stable since 2022 with 17.4% living below the national poverty line.
- The fertility rate and population growth in Tunisia is lower than MENA and world averages.
- 30% of population in Tunisia live in rural areas, lower than other countries in region except Jordan. Population density and distribution are increasingly important factors in food security and agricultural activities.
- Tunisia, similar to other countries, has employed variety of social protection programs and food subsidies to assure basic needs and mitigate impacts of external shocks. In 2019, 50% of Tunisia's population received contributory or non-contributory benefit.

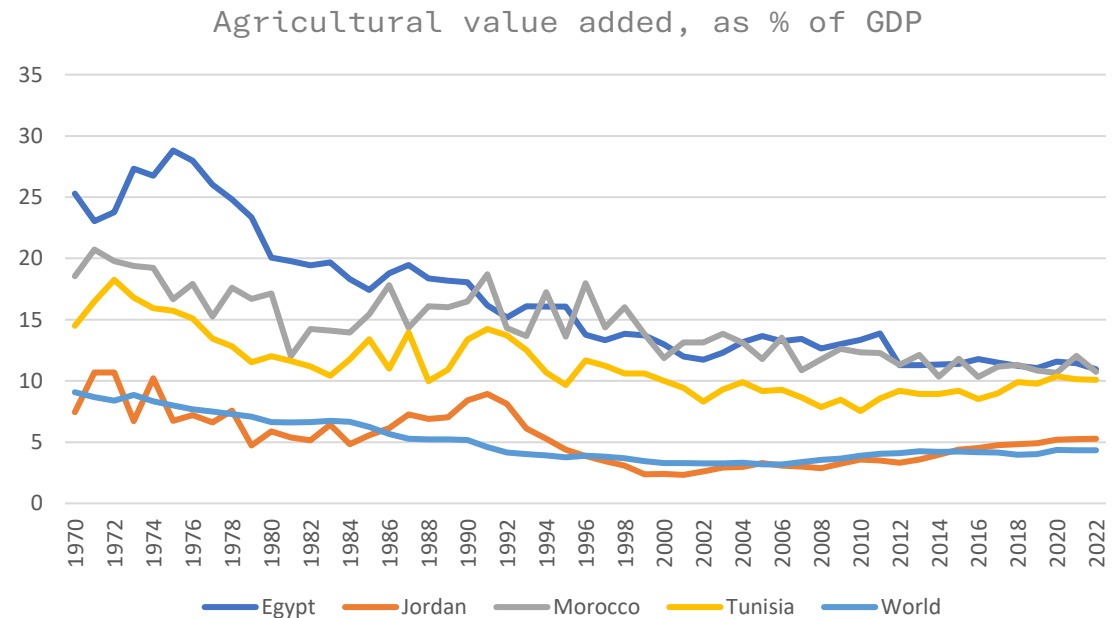
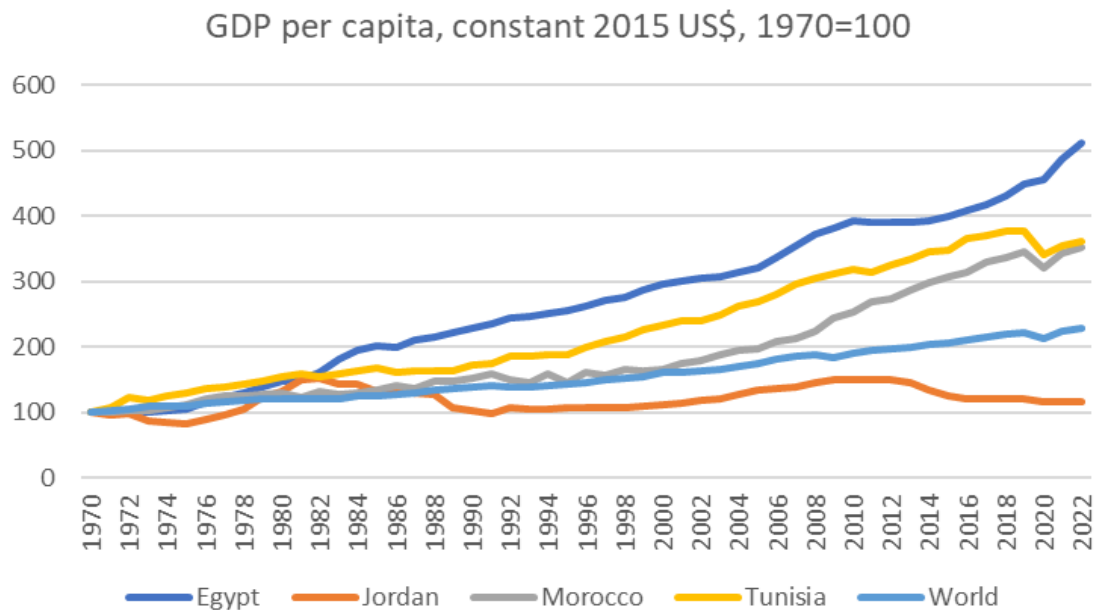


Source: International Monetary Fund, 2024

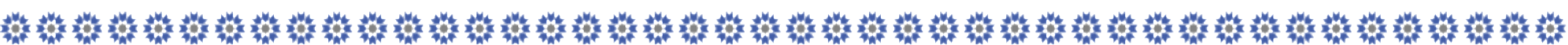
Since 1970, GDP per capita in Tunisia has risen at a rate similar to world average and SEMED countries, except Egypt.

Over the last 20 years, the growth rate of agriculture is similar to the rest of the economy in Tunisia.

Agriculture contributes approx. 10% to total GDP in Tunisia, above world average of 5%.



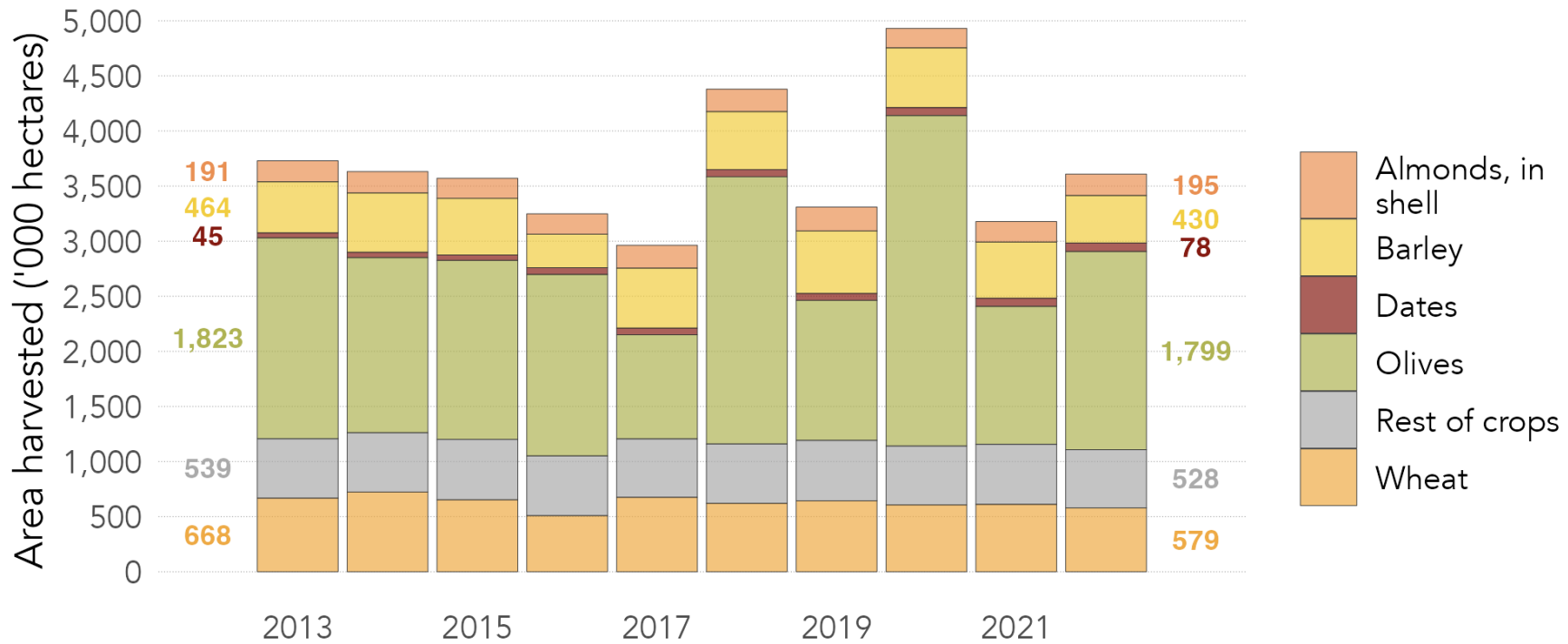
Source: FAOSTAT, 2024



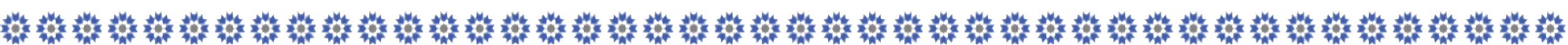
# Major crops in Tunisia

Olives  
Wheat  
Barley  
Almonds, in shell  
Dates

## Major crops by extent of harvested area

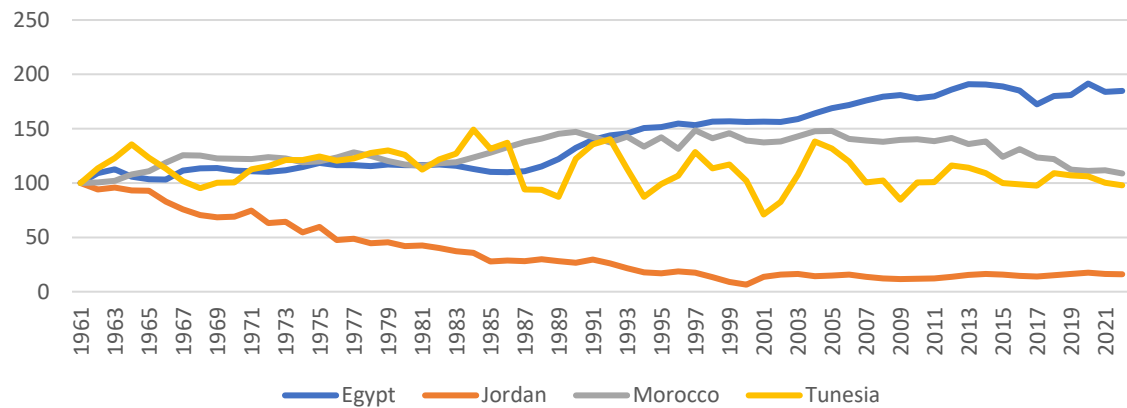


Source: FAOSTAT

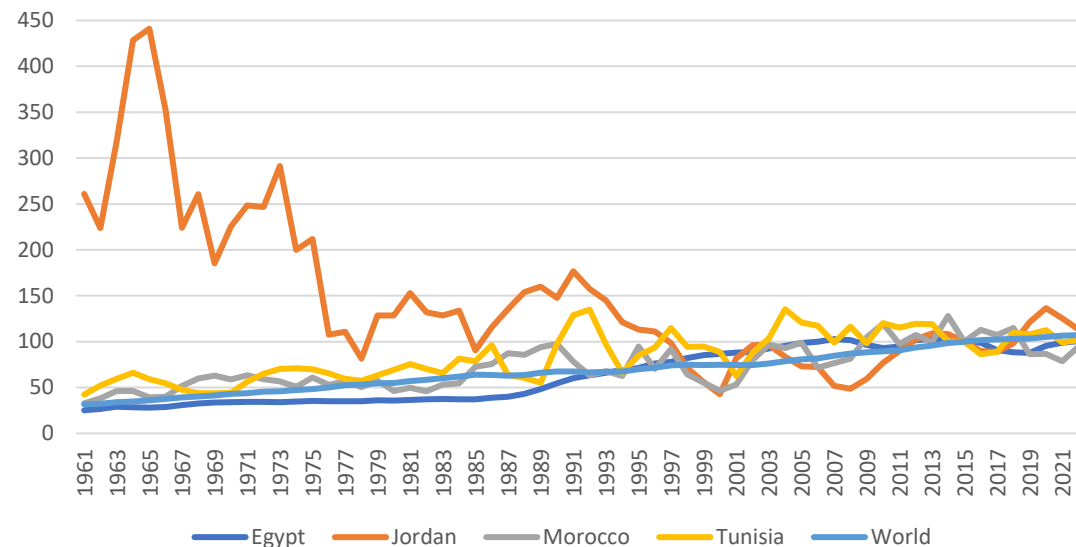


# Trends in cereal production in Tunisia

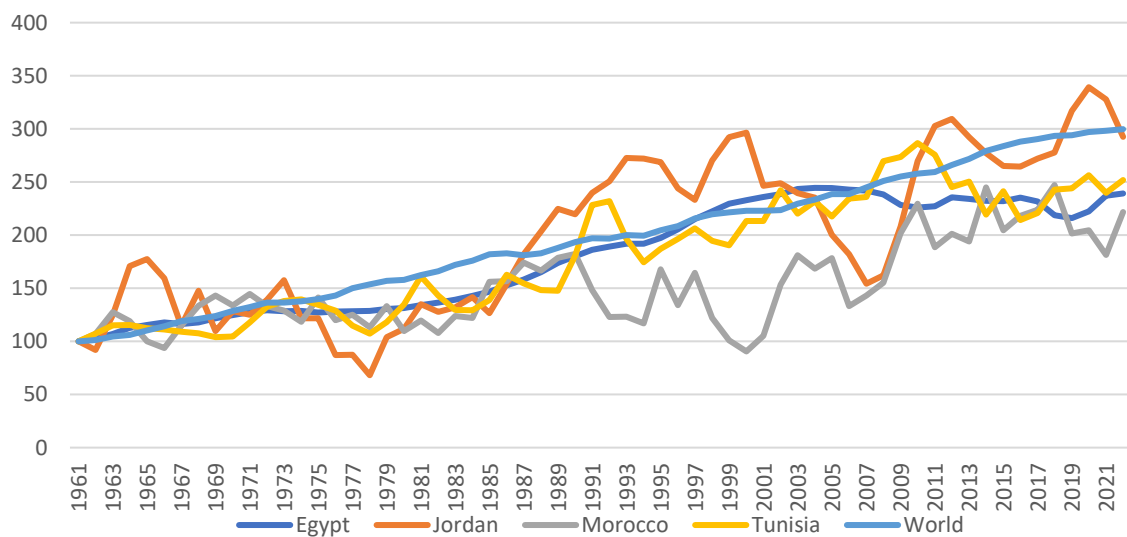
Area under production in cereals, 3 year moving average (1961=100)



Cereals, gross production index (2014-2016=100)



Cereal yields, three year average, 1961=100

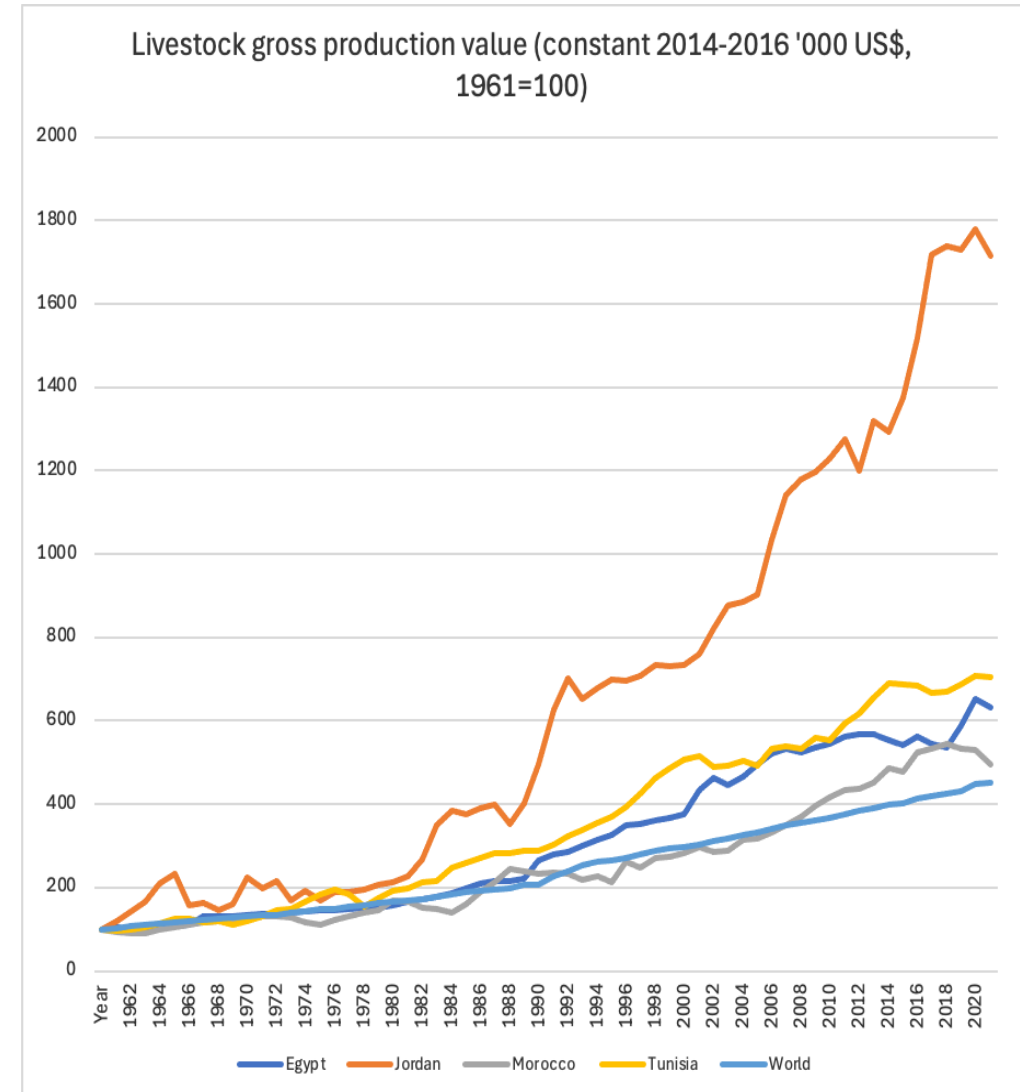


Increase in yields combined with similar area harvested led to increase in total cereals output

Wheat self-sufficiency is 36%

# Assessing the contribution of Tunisia's livestock sector to economy and food supply

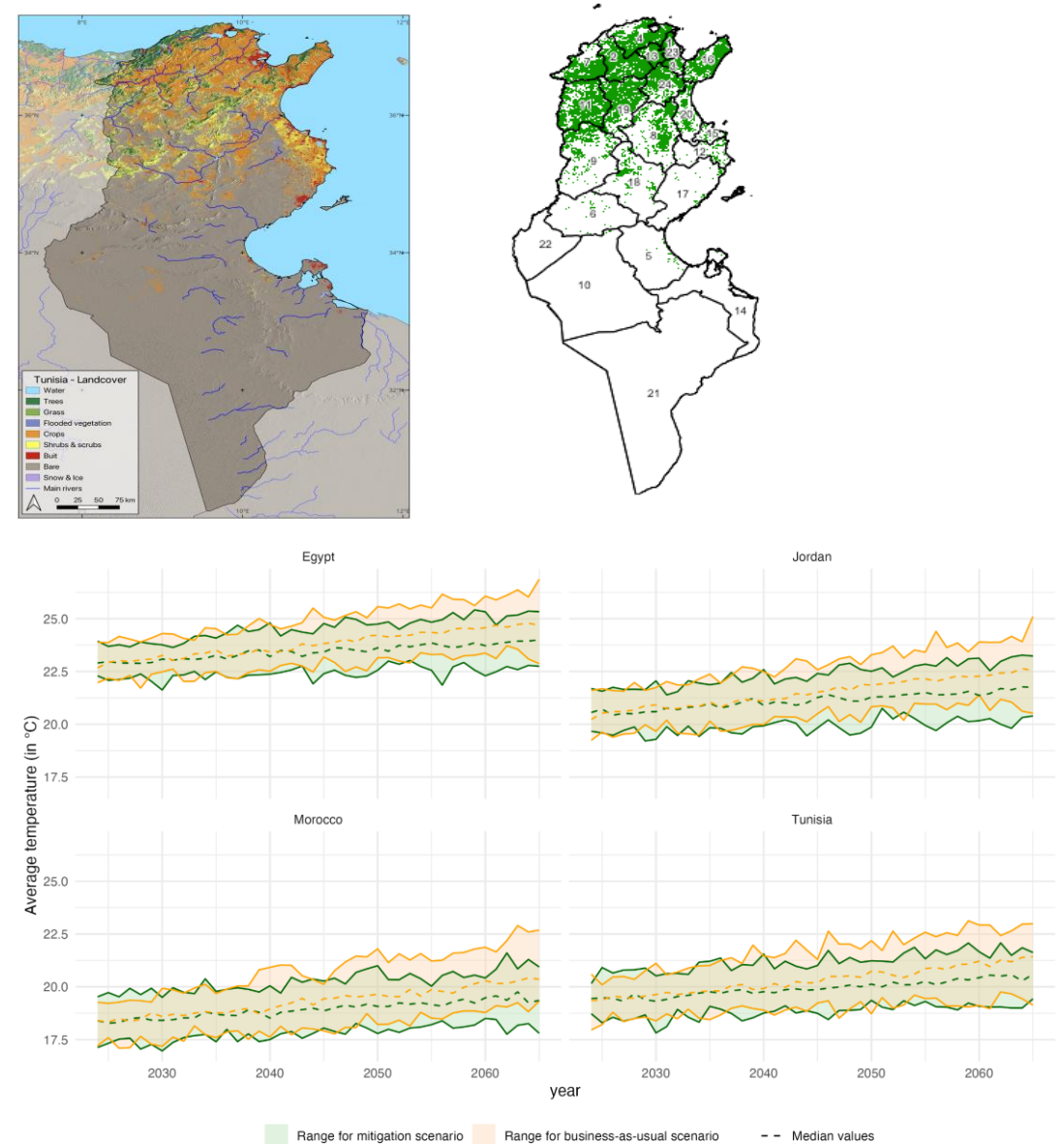
- Livestock is a vital component of Tunisia's agriculture, contributing 48% of the sector's output.
- Fisheries and aquaculture are important to Tunisia's economy and food security, contributing 0.23% of GDP, worth approximately USD 92 million in 2018.
- Agro-industries account for 3.6% of Tunisia's GDP, with food and beverage firms playing a significant role in manufacturing.
- The agrifood value chain and private sector in general is hindered by inadequate infrastructure, food quality and safety standards, dependence on imported raw materials, governance issues, limited market access, regulatory challenges, and resource constraints.
- Tunisia's policies aim to modernize agriculture and promote food self-sufficiency, despite heavy reliance on cereal imports.
- Domestic policies often result in higher producer prices for staple crops like wheat compared to import prices, indicating an emphasis on promoting local production. Tunisia subsidizes staple crop production through guaranteed prices and incentive premiums.



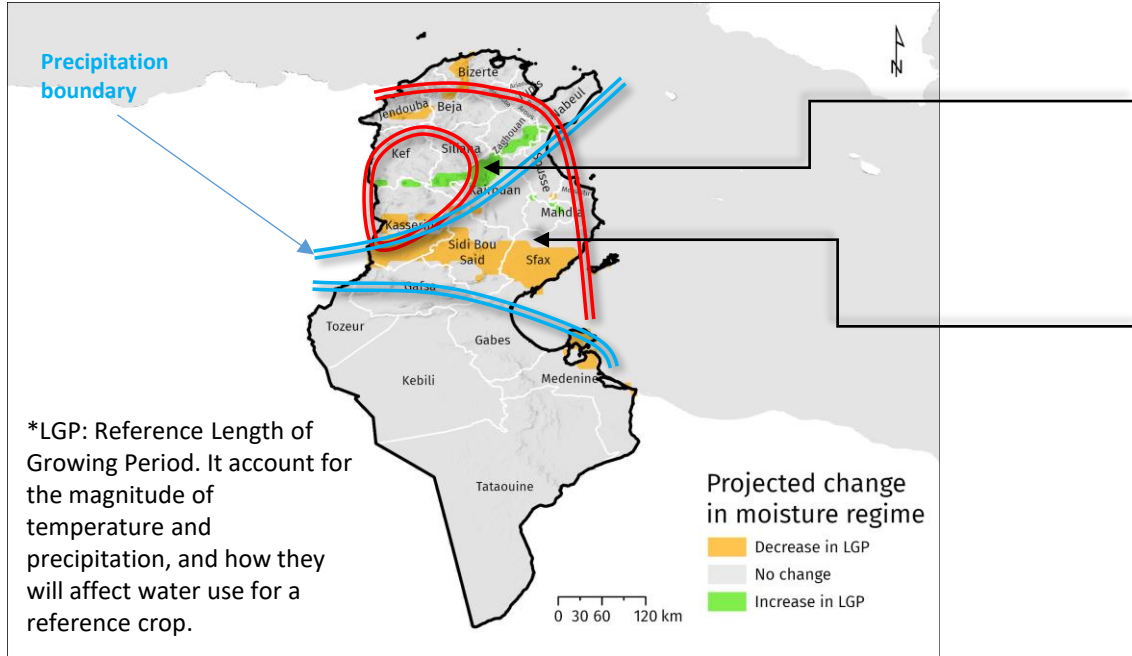
Source: FAO, 2024

# Land use, climate vulnerability, and critical water scarcity in Tunisia

- The predominant land cover in Tunisia is bare desert, making up more than 70% of land cover.
- Croplands cover 10.6% of total land.
- Tunisia's arid climate, recurrent droughts, and rising temperatures pose significant threats to agricultural production.
- Water availability per capita is alarmingly low in Tunisia, falling below threshold of 500 m<sup>3</sup> per capita per year with reduced per capita availability over last 40 years.
- Agriculture is primary consumer of water in Tunisia, with agricultural water withdrawal accounting for 75% of total water use, higher than global average.



# Climate change is projected to have significant negative impacts on agricultural production in Tunisia through 2040, particularly in reducing yield growth of wheat, barley, fruit and potatoes



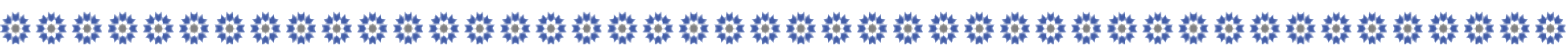
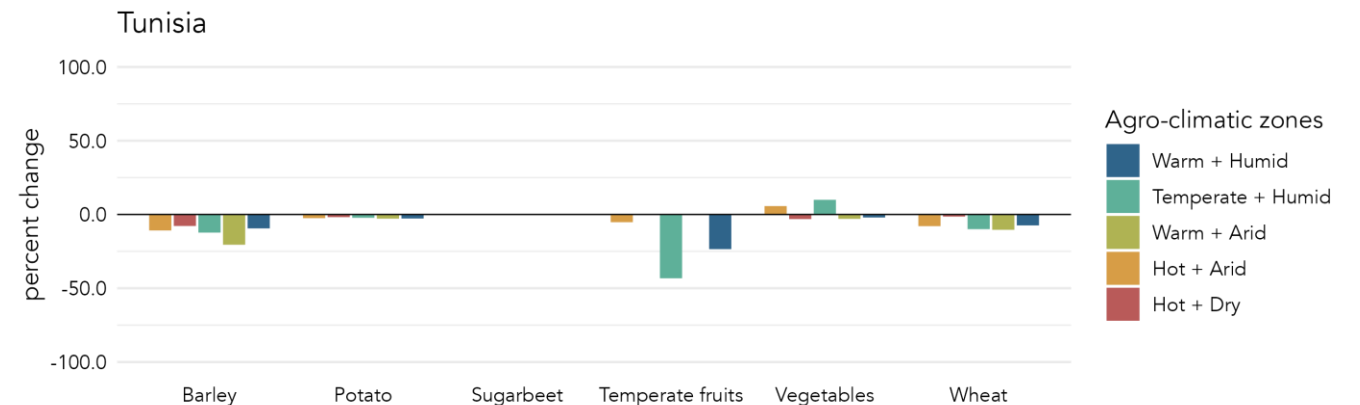
## Potential implication for crop production under climate change

Some positive effects of warming conditions (Increase in growing season in areas previously too cold for farming)

Warmer climates projected (would reduce yields for areas with low rainfall)

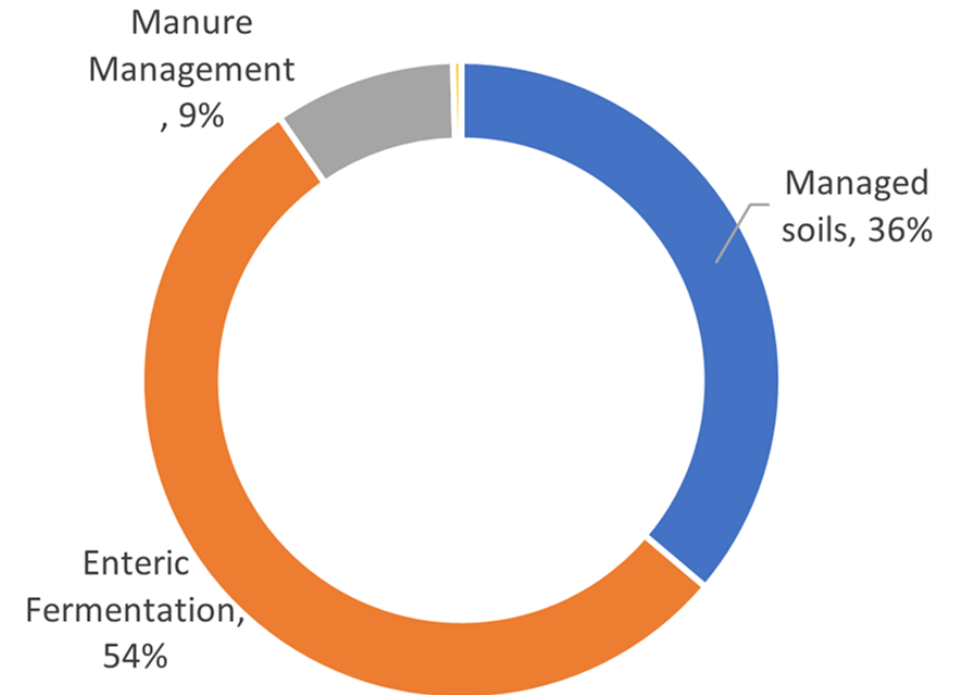
Where warming conditions would reduce farming suitability

	<b>Tunisia</b>
Wheat	- 8%
Potato	- 3%
Barley	-11%
Vegetables	+ 1%
Temperate fruit	-13%
Sugarbeet	n/a

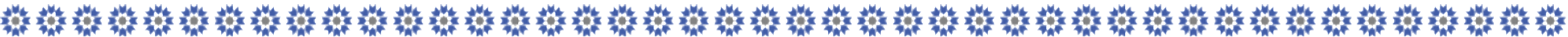


# Tunisia's agricultural emissions and National Climate Commitments (NDCs)

- Agriculture contributes 11% to Tunisia's total emissions, with overall per capita emissions below the global average. Emissions are primarily from enteric fermentation and managed soils.
- Tunisia's NDCs highlight agriculture as a priority sector. The country aims to cut carbon emissions by 44% by 2030 compared to 2010 levels in the energy sector, with focus on reducing emissions in food processing and irrigation.
- Tunisia's commitment to decarbonization and resilience investments is estimated at 3.9% of GDP, with significant challenges to implement NDCs including economic and financial constraints, limited knowledge, technical challenges, and institutional obstacles.

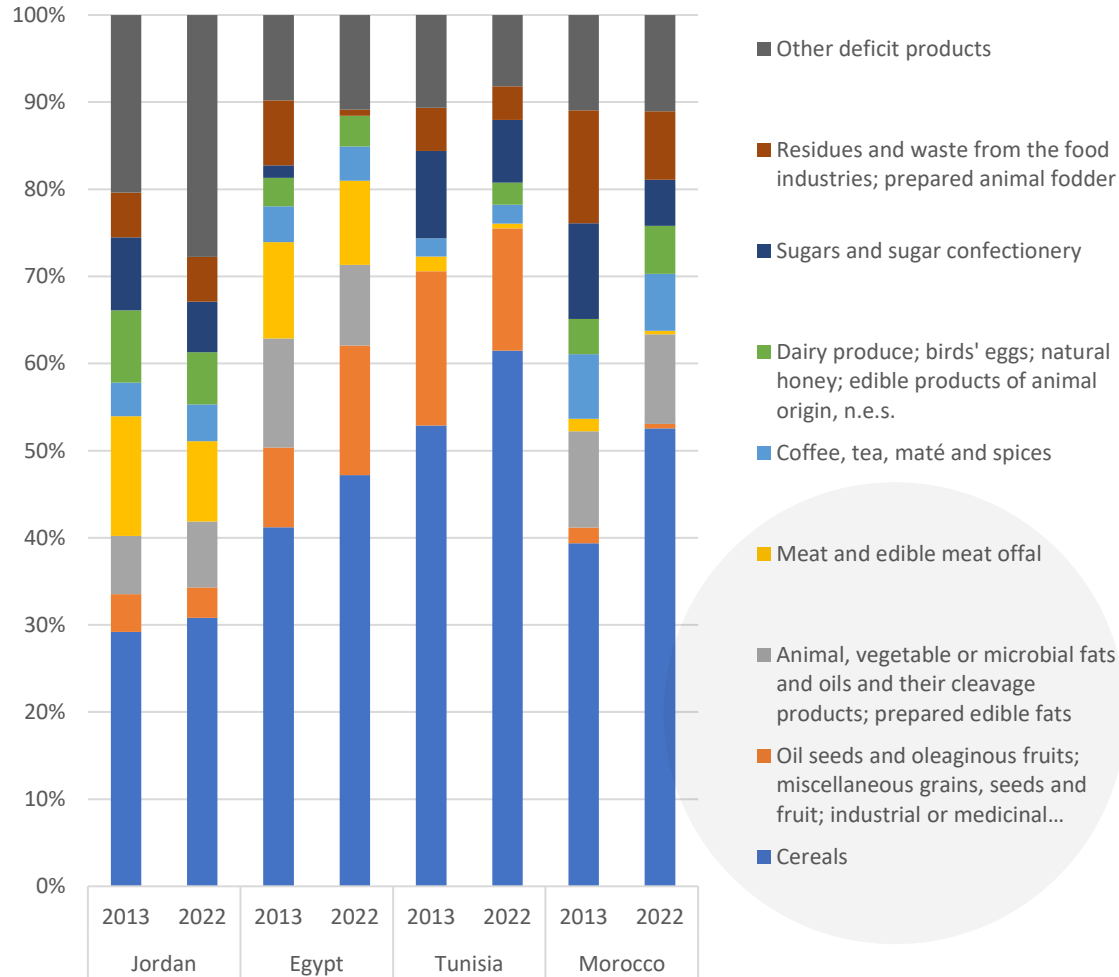


Sources: Latest National Communications to the UNFCCC



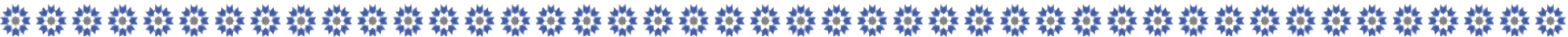
# Tunisia's agricultural trade exports and unrealized market

Composition of agricultural trade deficit in SEMED countries, 2013 and 2022.



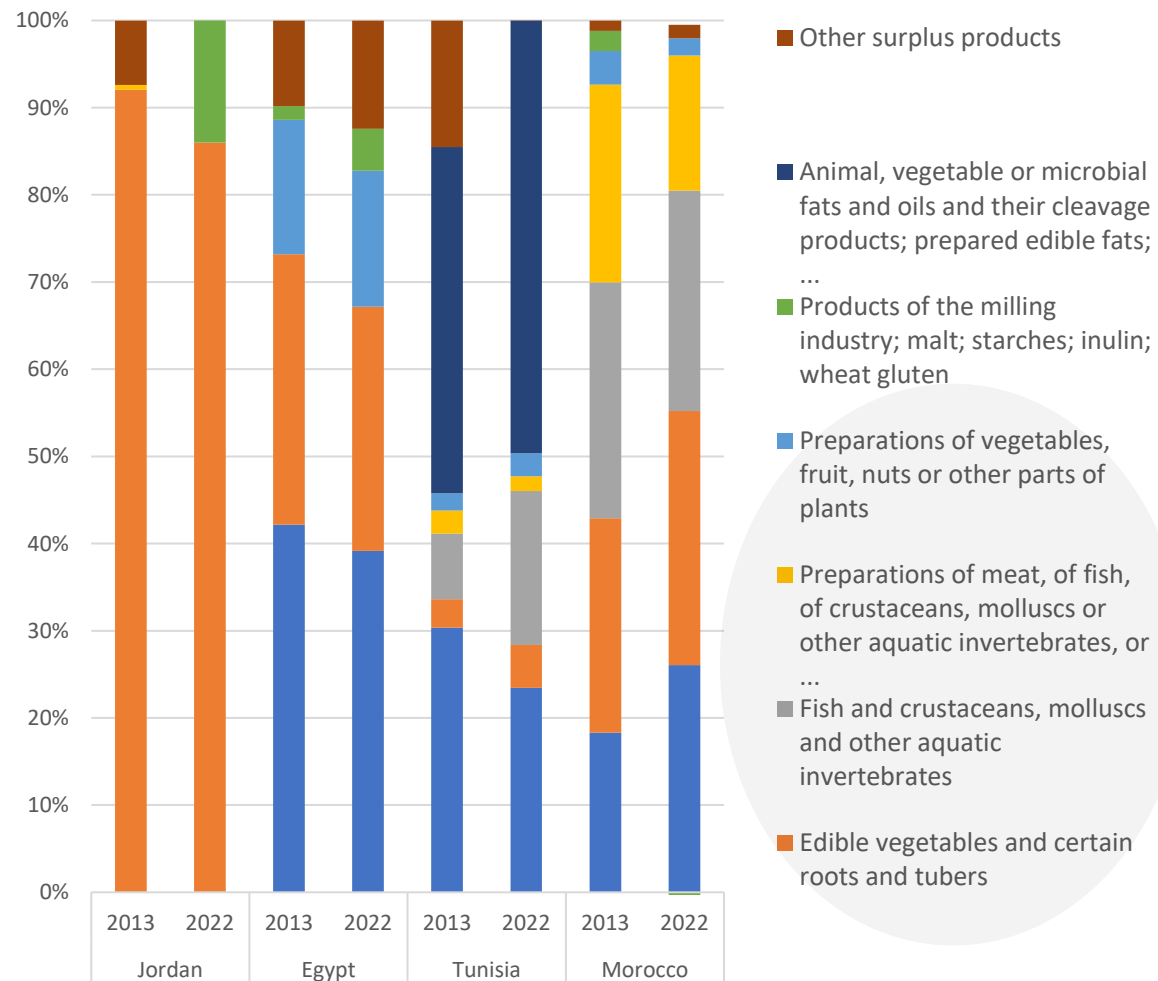
Source: International Trade Center (ITC). 2023. *Trade map*. <https://www.trademap.org/Index.aspx>

- Agri-trade in Tunisia has stagnated, although agri-trade deficit is stable at 2% of GDP.
- The share of cereals in Tunisia's agrifood trade deficit increased from 53% in 2013 to 61% in 2022, largely due to rising global cereal prices and the grain subsidy system.
- Cereals are the largest contributor to Tunisia's food import dependence, with import dependency rate in calorie terms rising from 58% to 72%. Also, Tunisia has significant import dependencies in sugar (88%) and oilseeds (44%), reflecting evolving consumption patterns.
- Tunisia has moderate diversification of suppliers, mainly sourcing cereals and oilseeds from Argentina, Canada, EU, Ukraine and the Russian Federation.
- Tunisia faces challenges in food import efficiency, with significant food losses—cereals (5%) and oil crops (3%) are especially vulnerable.
- Tunisia applies higher-than-average import tariffs on some agricultural products, such as sugar and confectionery, oil seeds and animal/vegetable fats and oils.



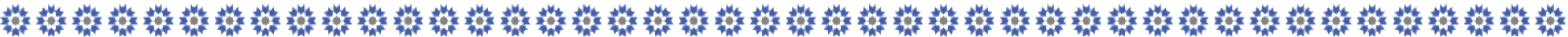
# Tunisia's agri-trade deficit and food import dependency

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



- Key surplus-generating exports include animal and vegetable fats and oils (including olive oil), fish, and fruits and vegetables.
- Tunisia's agrifood exports are heavily concentrated in EU market, accounting for 53% of exports in 2021.
- Agricultural inputs represent 4% of Tunisia's total trade, with fertilizer trade surplus as a source of foreign currency.

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



## Policies strategic direction



- Redirect existing subsidies toward nutrient-dense foods while implementing a digital voucher system for low-income households to ensure access to healthy food options.
- Strengthen middle segment of the food value chain, with substantial investments in modernizing cold storage facilities and incentivizing private sector participation.
- Place priority on reducing food loss by establishing standardized packaging requirements for agricultural transport, providing financial support to small-scale farmers for proper storage facilities, and streamlining import procedures to enhance overall system efficiency
- Address climate change challenges through adoption of water-efficient irrigation systems, climate-smart farming technologies, and sustainable water management practices

# Thank you

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