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Report Name: Aquaculture Industry a Driver for US Feed Exports

Country: Tunisia

Post: Tunis

Report Category: Agricultural Situation, Fishery Products, Grain and Feed, Oilseeds and Products

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Report Highlights:

With hundreds of miles of Mediterranean coastline and a significant tourism industry focused on the sea, there is strong demand for seafood in Tunisia. Over the past 20 years, Tunisia's domestic aquaculture industry has grown to meet this demand, and so has demand for feed grains. Tunisia's aquaculture production rose from 3,000 MT two decades ago to 23,000 MT in 2024 - and is projected to reach 35,000 MT in 2030. Aquaculture increasingly replaces wild catch in Tunisian diets. The leading varieties in terms of quantity and value are sea bass and sea bream.

Background

Tunisia maintains a Mediterranean coastline of 1,350 km with a national maritime domain of 80,000 km^2 and 105,200 ha of lagoons. In 2024, over 10 million tourists visited the country, mostly visiting the hotels and restaurants along the Mediterranean and many looking to eat seafood. While Tunisia has long been a country of sailors and fishing, aquaculture is a small but growing industry, accounting for 13% of total fishery production value and 3,000 direct jobs. Aquaculture is increasingly important to alleviate pressure on wild caught fish stocks in Tunisian waters.

There are 42 aquaculture farms in the sea and 30 freshwater operations that include tuna fattening, emerging algae cultivation, marine finfish, shellfish, and shrimp farming. These operations generated over $123 million USD in revenues in 2024 compared to $112 USD million in 2023.

Production

Tunisia's aquaculture production rose from a 14,613 MT in 2015 to 23,003 MT in 2024. The leading products in terms of quantity and value are sea bass, sea bream, and meagre with the expansion of floating and submersible cage operations. The Ministry of Agriculture projects that production will reach 35,000 MT in 2030.

Tunisia Aquaculture Production, 2015-2024, MT

	2015	***2016***	***2017***	***2018***	***2019***	***2020***	***2021***	***2022***	***2023***	***2024***
Shellfish	191	198	220	215	185	180	216	245	214	222
Bluefin Tuna Fattening	1,195	1,206	1,374	1,302	1,398	1,370	1,356	950	1,497	1,283
Other Marine Fish *(e.g., Sea Bass; Sea Bream)*	9,997	11,950	17,386	17,393	19,463	18,947	23,181	18,676	19,035	20,748
Inland fish	1,230	1,005	953	976	1,187	1,158	1,324	1,054	641	950
TOTAL	**14,613**	**16,359**	**21,933**	**21,886**	**24,233**	**23,655**	**26,077**	**20,925**	**21,387**	**23,203**
Growth		*+12%*	*+34%*	*-0.2%*	*+11%*	*-2%*	*+10%*	*-19%*	*+5%*	*+9%*

Source: Ministry of Agriculture and FAS Tunis Research

While growth has been fluctuating, Tunisia's fisheries and aquaculture experts concluded the aquaculture sector's potential future growth is around 9 percent annually.

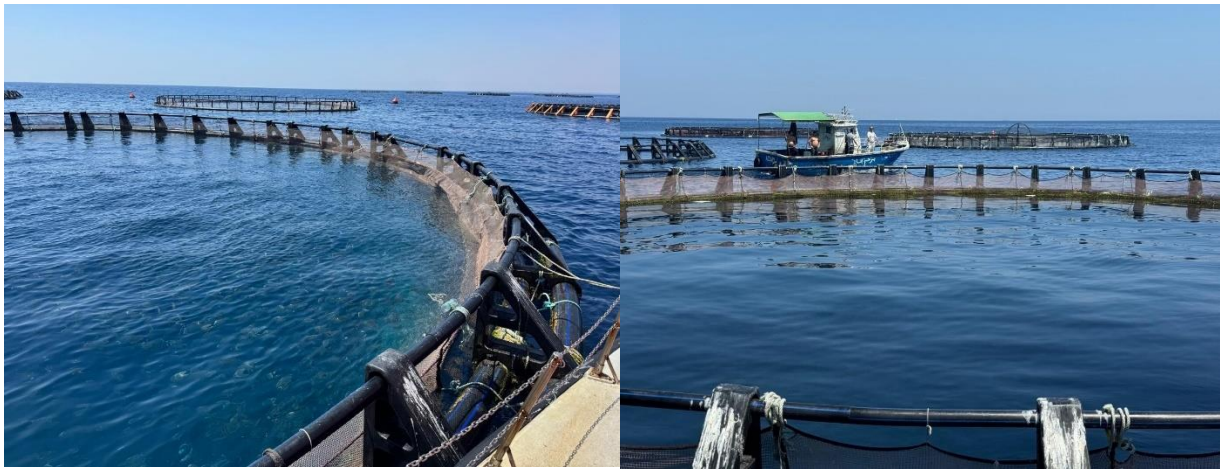
At present, there are roughly 57 companies involved in aquaculture production. They do the following:

- Shellfish farming: production remains very limited and only 4 companies out of 16 are still active. The decline is mostly due to loss of adequate habitat from environmental degradation such as pollutant runoff and warming seawater from rising average air temperatures.

- Bluefin tuna fattening: 3 export-oriented companies operate in this sub sector with their production totally exported to Asian markets.
- Marine fish farming: 20 companies. Production relies heavily on imported fry and feed.
- Inland fish farming: 30 companies. Main species are mullet, carps, and pikeperch.

Most shellfish production is concentrated in northern Tunisia, particularly in the Bizerte governorate's lagoons, using both breeding tables and floating lines.

The primary marine aquaculture production area is in the Monastir governorate, along Tunisia's eastern shore. Marine aquaculture is practiced using modern and innovative techniques, whether in concrete facilities with a density of 60 kg/m^3 or in floating cages on the high seas. Alevin are imported for sea bass and sea bream production while bluefin tuna are imported for fattening.



Marine Aquaculture Production Near Monastir

Inland aquaculture is mostly practiced in the Beja governorate producing freshwater fish, including thinlp mullet *(Liza Ramado)*, common carp *(Cyprinus Carpio)*, zander *(Stizostedion Lucioperca)*, and flathead grey mullet *(Mugil Cephalus)*. Inland aquaculture consists of incorporating alevin in dams, some of which are imported and others of which are bred locally.

Industry points to ineffective disease controls and poor feed quality as causes for below average performance within the aquaculture sector. Industry also indicates the sector is not well organized in terms of value chain integration, relying exclusively on middlemen to get aquaculture products from the farm to the marketplace.

Consumption

Per capita consumption of fishery products coming from both aquaculture and wild catch was 12 kg in 2024 compared to 10 kg in 2014. There is a large disparity between coastal and interior regions, where per capita consumption is only 2 kg.

Domestic demand for aquaculture products is likely to grow 10% annually and be driven largely by lower availability of wild catch fishery products and lower purchase prices for consumers.

Trade

The largest seafood export markets for Tunisia (including wild catch) are Europe, Japan, Indonesia, and Canada.

Tunisia Seafood Exports (in millions of USD), 2020-2024

	2020	2021	2022	2023	2024
Seafood Exports	175	235	291	279	276

Source: Trade Data Monitor, LLC

Tunisia mostly sources seafood from Europe, India, and Senegal.

Tunisia Seafood Imports (in millions of USD), 2020-2024

	2020	2021	2022	2023	2024
Seafood Imports	74	90	79	107	109

Source: Trade Data Monitor, LLC

Policy

Development of the aquaculture sector in Tunisia remains far below its potential, and the government's goal is to support its growth to relieve pressure on wild catch fish stocks. The government's plan includes the following:

- Implementing environmental standards and biosecurity protocols
- Implementing efficient integrated diseases management
- Supporting private investment in aquaculture projects by subsidizing 7 to 25 percent of the project cost plus tax savings
- Introducing new species, such as shrimp and seaweed

Aquaculture in Tunisia is a strategic sector with strong growth potential. Its strengths lie in its location, diversity of cultivated species, and institutional support. However, sustainable development will depend on managing environmental risks, technological innovation, and strengthening export markets.

Opportunities for U.S. Feed and Rendered Products:

The development of the aquaculture sector in Tunisia relies heavily on the availability of good fish feed. U.S. corn, soy, dried distillers' grains (DDGs). and corn gluten meals are already critical in the formulation of fish feed in Tunisa and still have good growth prospects.

Tunisian fish feed absorbs all U.S. corn gluten meals exports into Tunisia estimated at 5,000 MT per year, 12% of the U.S. DDGs (estimated at 3,000 MT per year), one percent of U.S. corn exports (estimated at 9,000 MT), and 0.5 percent of U.S. soybean exports (estimated at 4,500 MT per year). (Seventy percent of soybean meal is destined for the poultry and egg sectors.)

On the other hand, aquaculture companies are looking to allow rendered poultry products to be used in fish feed in Tunisia. These companies are currently at a competitive disadvantage vis-a-vis their competitors in Turkey and Greece because these countries allow lower cost rendered products in their feed in place of only fish meal and oil. Tunisian producers say the use of rendered products would significantly reduce the production cost of aquaculture products - which would make them more affordable for Tunisian consumers and more competitive in export markets like Europe. It would ultimately open opportunities for U.S. rendered products.

Attachments:

No Attachments.