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Tunisia

Grain and Feed

Annual

1999

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Report Highlights:

In MY, the U.S. share of the Tunisian wheat imports dropped sharply to 6 percent compared to 34 percent the previous year as the direct result of extremely high EU export subsidies that exceeded 40 percent of the landed price of wheat throughout North Africa.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
Annual Report
Tunis [TS1], TS

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Executive Summary

Below average rainfall this year in the central and southern regions of Tunisia during seedbed preparation and seeding time resulted in reduced total cereal planted acreage. However, exceptionally abundant and well distributed rainfall across the major cereal producing regions of the country since January helped substantially cereal crops growth and development.

Total area planted in cereals in 1998/1999 declined 4 percent, to about 1.38 million Ha, compared to 1.44 million Ha in 1997/1998, but is about 14 percent short of the planned figure of 1.6 million HA. If favorable climatic conditions prevail until harvest time, total cereal production is forecast to reach about 2,500,000 MT (durum wheat 1,650,000 MT, bread wheat 380,000 MT and barley 470,000 MT).

In order to meet its needs and, at the same time build up its stocks while international wheat and barley export prices are attractive, Tunisia will need to import in 1998/1999, an estimated 675,000 MT of bread wheat, 225,000 MT of durum wheat and 140,000 MT of barley.

Wheat

As a result of above average domestic production in 1998, all wheat imports for 1998/1999 decreased about 35 percent compared to their previous year's level of 1,392,000 MT while imports of barley decreased about 43 percent to 140,000 MT. In 1998, imports from the U.S., in terms of market share, dropped by 28 percent. This extremely sharp decline is essentially the direct result of extremely high EU export subsidies that, according to U.S. Wheat Associates, exceeded 40 percent of the landed price of wheat throughout North Africa, thus allowing EU wheat to undercut SRW prices by over \$10/MT on a CIF basis.

For bread wheat, in MY 1998/1999 (July 1998-June 1999), Tunisia purchased approximately 675,000 MT, of which 600,000 MT were delivered (50,000 MT from the U.S.). The remaining undelivered balance of 75,000 MT is of French origin. With respect to durum wheat for which Tunisia is generally self sufficient in high to average rainfall years, Tunisian imports amounted to approximately 225,000 MT, of which 150,000 MT were delivered. In terms of all wheat (durum and bread wheat combined), total Tunisian imports amount to approximately 900,000 MT, of which the U.S. share is about 6 percent compared to 34 percent the previous year. MY 1999 total exports of processed wheat products are estimated at 163,000 MT (wheat equivalent).

Wheat and barley imports for MY 1999/2000 are estimated as follows: durum wheat 150,000 MT, bread wheat 700,000 MT and barley 50,000 MT. The U.S. market share for wheat is projected to be about 260,000 MT, a 31 percent increase in market share.

Based on official GOT statistics, MY 1998 wheat production has been revised to 1,353,000 MT.

Wheat, Durum

MY 1999 estimated production and consumption are 1,650,000 MT and 1,220,000 MT, respectively, while Tunisian exports of pasta and couscous products are estimated at 20,000 MT (durum wheat equivalent MT).

Barley

MY 1998 ending stocks were revised upward based on recently released official statistics that corrected previous under estimated production figure for 1998.

Statistical Section

Wheat

PSD Table						
Country:	Tunisia					
Commodity:	Wheat					
		1997		1998		1999
	Old	New	Old	New	Old	New
Market Year Begin		07/1997		07/1998		07/1999
Area Harvested	1100	820	800	950	950	910
Beginning Stocks	200	888	694	474	584	1017
Production	2000	903	900	1353	1200	2034
TOTAL Mkt. Yr. Imports	922	806	1400	1392	1000	900
Jul-Jun Imports	922	806	1400	1392	1000	900
Jul-Jun Import U.S.	174	160	0	473	0	50
TOTAL SUPPLY	3122	2597	2994	3219	2784	3951
TOTAL Mkt. Yr. Exports	50	73	50	152	50	163
Jul-Jun Exports	50	0	50	0	50	0
Feed Dom. Consumption	0	0	0	0	0	0
TOTAL Dom. Consumption	2378	2050	2360	2050	2400	2060
Ending Stocks	694	474	584	1017	334	1728
TOTAL DISTRIBUTION	3122	2597	2994	3219	2784	3951

Export Trade Matrix			
Country:		Units:	1,000 MT
Commodity:	Wheat		
Time period:	MY		
Exports for	1997		1998
U.S.		U.S.	
Others		Others	
Libya	141	Libya	143
Total for Others	141		143
Others not listed	11		20
Grand Total	152		163

Import Trade Matrix			
Country:		Units:	1,0000 MT
Commodity:	Wheat		
Time period:	MY		
Imports for	1997		1998
U.S.	473	U.S.	50
Others		Others	
France	283	France	325
Argentina	134	Turkey	200
Canada	73	Germany	100
Kazakhstan	52	Australia	50
UK	26	Canada	25
Turkey	25		
Australia	23		
Total for Others	616		700
Others not listed	303		150
Grand Total	1392		900

Wheat, Durum

PSD Table						
Country:	Tunisia					
Commodity:	Wheat, Durum					
		1997		1998		1999
	Old	New	Old	New	Old	New
Market Year Begin		07/1997		07/1998		07/1999
Area Harvested	0	595	0	800	0	672
Beginning Stocks	0	564	0	361	0	839
Production	0	800	0	1090	0	1650
TOTAL Mkt. Yr. Imports	0	100	0	597	0	225
Jul-Jun Imports	0	100	0	597	0	225
Jul-Jun Import U.S.	0	25	0	304	0	0
TOTAL SUPPLY	0	1464	0	2048	0	2714
TOTAL Mkt. Yr. Exports	0	3	0	9	0	20
Jul-Jun Exports	0	0	0	0	0	0
Feed Dom. Consumption	0	0	0	0	0	0
TOTAL Dom. Consumption	0	1100	0	1200	0	1220
Ending Stocks	0	361	0	839	0	1474
TOTAL DISTRIBUTION	0	1464	0	2048	0	2714

Export Trade Matrix			
Country:		Units:	1,000 MT
Commodity:	Wheat, Durum		
Time period:	MY		
Exports for	1997		1998
U.S.		U.S.	
Others		Others	
Ivory Coast	4	Ivory Coast	10
		Senegal	3
Total for Others	4		13
Others not listed	5		7
Grand Total	9		20

Import Trade Matrix			
Country:		Units:	1,000 MT
Commodity:	Wheat, Durum		
Time period:	MY		
Imports for	1997		1998
U.S.	304	U.S.	
Others		Others	
Kazakhstan	52	Turkey	125
Turkey	25	Canada	25
Canada	25		
Australia	23		
Greece	5		
Total for Others	130		150
Others not listed	163		75
Grand Total	597		225

Barley

PSD Table						
Country:	Tunisia					
Commodity:	Barley					
		1997		1998		1999
	Old	New	Old	New	Old	New
Market Year Begin		07/1997		07/1998		07/1999
Area Harvested	712	260	260	260	260	466
Beginning Stocks	200	339	370	189	40	286
Production	861	200	200	302	150	406
TOTAL Mkt. Yr. Imports	200	150	300	245	500	140
Oct-Sep Imports	230	0	300	0	500	0
Oct-Sep Import U.S.	0	0	0	0	0	0
TOTAL SUPPLY	1261	689	870	736	690	832
TOTAL Mkt. Yr. Exports	0	0	0	0	0	0
Oct-Sep Exports	0	0	0	0	0	0
Feed Dom. Consumption	830	480	760	430	475	350
TOTAL Dom. Consumption	891	500	830	450	650	370
Ending Stocks	370	189	40	286	40	462
TOTAL DISTRIBUTION	1261	689	870	736	690	832

Import Trade Matrix			
Country:		Units:	1,000 MT
Commodity:	Barley		
Time period:	MY		
Imports for	1997		1998
U.S.		U.S.	
Others		Others	
UK	57	Turkey	72
Turkey	51	Ukraine	45
Finland	25	Spain	23
Netherlands	24		
Canada	14		
Total for Others	171		140
Others not listed	74		
Grand Total	245		140