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Report Name: Grain and Feed Annual

Country: Tunisia

Post: Tunis

Report Category: Grain and Feed

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Report Highlights:

Highly favorable winter growing conditions set Tunisia up for a well above average 2025 harvest. The wheat and barley crops have developed very well entering the most critical growing period in April. Post forecasts MY 2025/26 wheat and barley production at 1.35 MMT and 500,000 MT, respectively, with imports at 1.7 MMT and 450,000 MT. Wheat and barley forecasted imports represent roughly a 10% and 40% decrease respectively compared to estimated imports in MY 2024/25.

Executive Summary:

MY 2025/26

- With much better winter rains than in recent years, Post forecasts MY 2025/26 wheat production at 1.35 MMT and barley production at 500,000 MT that accounts for roughly 14% and 80% increases respectively compared to production recorded in MY 2024/25.
- Tunisia's MY 2025/26 seeded area for wheat increased to 581,000 HA from 566,000 HA in MY 2023/24, of which 549,000 HA is durum wheat and 32,000 HA is common wheat. (Note- Tunisia's harvested area is less than the seeded area. See table 4 for harvested area),
- Barley seeded area increased to 412,000 HA in MY 2025/26 from 395,000 HA in MY 2024/25.
- The irrigated area of wheat and barley decreased from 84,000 HA to 80,000 HA in MY 2025/26.
- High soil moisture during planting, outstanding rainfall and moderate temperatures are extending wheat and barley production. As a result, Post anticipates that Tunisia will have a well above average production in MY 2025/26.
- Wheat yields remain dependent on April rainfall, which could improve yields by 10 to 20 percent if favorable.
- Tunisian wheat consumption in MY 2025/26 is forecast at 2.99 MMT, reflecting an average growth trend of roughly two percent. Barley consumption in MY 2025/26 is forecast at 940,000 MT, reflecting average growth.
- To cover demand while maintaining stock levels, Post forecasts Tunisia's wheat imports in MY 2025/26 at 1.7 MMT, while barley imports are forecast at 450,000 MT.
- After a test period last market year, The Tunisian Government confirmed in MY 2025/26 policy changes, which allow private companies to directly import barley instead of going through Tunisia's Office des Cereales (Cereal Board).

MY 2024/25

Post adjusts the MY 2024/25 balance sheet to reflect official harvested area and production for wheat considering slight consumption increase driven by normal population growth. Post increased the MY 2024/25 estimate for wheat and barley ending stocks to 474,000 MT and 250,000 MT, respectively, to reflect Tunisia' efforts to reach again historical stocks levels with a slightly improved procurement capacity.

Post adjusts the MY 2024/25 balance sheet to reflect official harvested area and production for barley considering consumption decrease driven by an abundance in rangelands resources that lower demand on barley.

MY 2023/24

No changes made to MY 2023/24 numbers.

Commodities:

Area

Wheat

Barley

According to the Ministry of Agriculture¹ and farmer associations, Tunisian seeded area for wheat increased from 566,000 HA in MY 2024/25 to 581,000 HA in MY 2025/26. Seeded area includes 549,000 HA of durum wheat and 32,000 HA of common wheat. The seeded area for barley is 412,000 HA, up from 395,000 HA in MY 2024/25. Irrigated area of wheat and barley slightly decreased from 84,000 HA to 80,000 HA. The increase in wheat planted area is due to a better seed availability at the beginning of the campaign and high soil moisture availability around the seeding period.

Table 1: Wheat and Barley Area by Year

	MY 20/21	MY 21/22	MY 22/23	MY 23/24	MY 24/25	MY 25/26
Wheat, Seeded	556	607	579	620	566	581
- Durum	495	542	515	550	514	549
- Common	61	65	64	70	52	32
Barley, Seeded	518	510	430	332	395	412
Wheat and Barley, Seeded	1,074	1,117	1,009	952	961	993
Wheat, Harvested	490	522	510	329	536	551
- Durum	435	459	448	286	486	520
- Common	55	63	62	43	50	31
Barley, Harvested	413	279	300	108	225	290
Wheat and Barley, Harvested	903	801	810	437	761	841

Source: Tunisian Ministry of Agriculture; *FAS/Tunis forecast MY 25/26 harvested area

Production

Post forecasts MY 2025/26 wheat production at 1.35 MMT and barley production at 500,000 MT. Planting was started and completed by mid-December 2024 during continued wet weather. This was followed by high levels of rainfall in January through March 2025, and wheat and barley benefited from this moisture and clement temperatures. USDA field visits in March 2025 confirmed that, the Tunisian wheat crop is experiencing a well above average vegetation growth with no noticeable pest or disease problems. (Contacts report that fertilizer supplies are normal, but given expected high production, fertilizer demand would exceed supply). Tunisian wheat sector contacts currently estimate that

¹ Tunisia's official production estimates are reported by the Agricultural Production Division, which is under the supervision of the Ministry of Agriculture. In general, Tunisian production estimates are performed by the Ministry of Agriculture through an annual survey and in collaboration with the National Remote Sensing Center and the Field Crop Institute, which provides estimates based on satellite imagery.

production could increase by as much as 15 to 25 percent compared to a decent crop in MY 2024/25, especially if the crops receive enough rainfall in April 2025. Wheat seeds were available at the requested level during the sowing period. (Planting normally runs mid-October to mid-December).

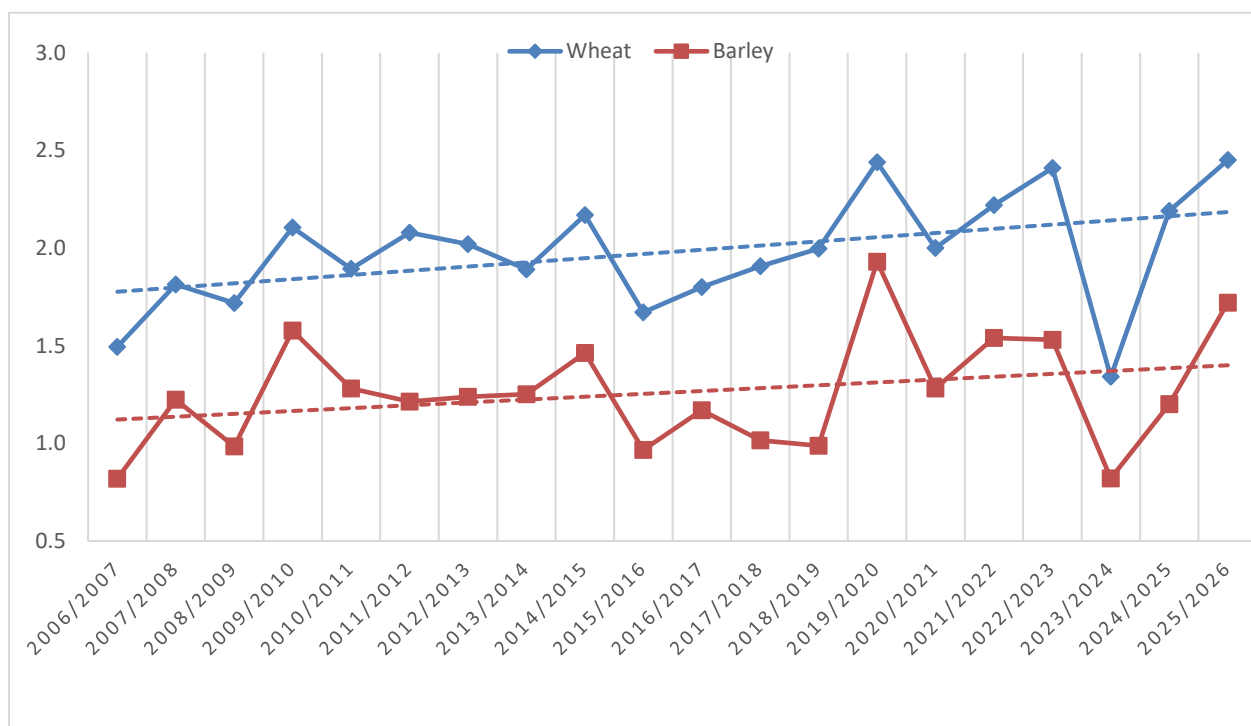
Based on industry and official Tunisian estimates, Post revised production a touch upward in MY 2024/25 to 1.1179 MMT for wheat and downward to 272,000 MT for barley due to a lower-than-expected harvest.

Table 2: Wheat and Barley Production by Year

	MY 20/21	MY 21/22	MY 22/23	MY 23/24	MY 24/25	MY 25/26
Wheat	1,043	1,191	1,230	442	1,179	1,350
- Durum	959	1,071	1,030	428	1,066	1,276
- Common	84	120	200	14	113	74
Barley	465	430	460	90	272	500

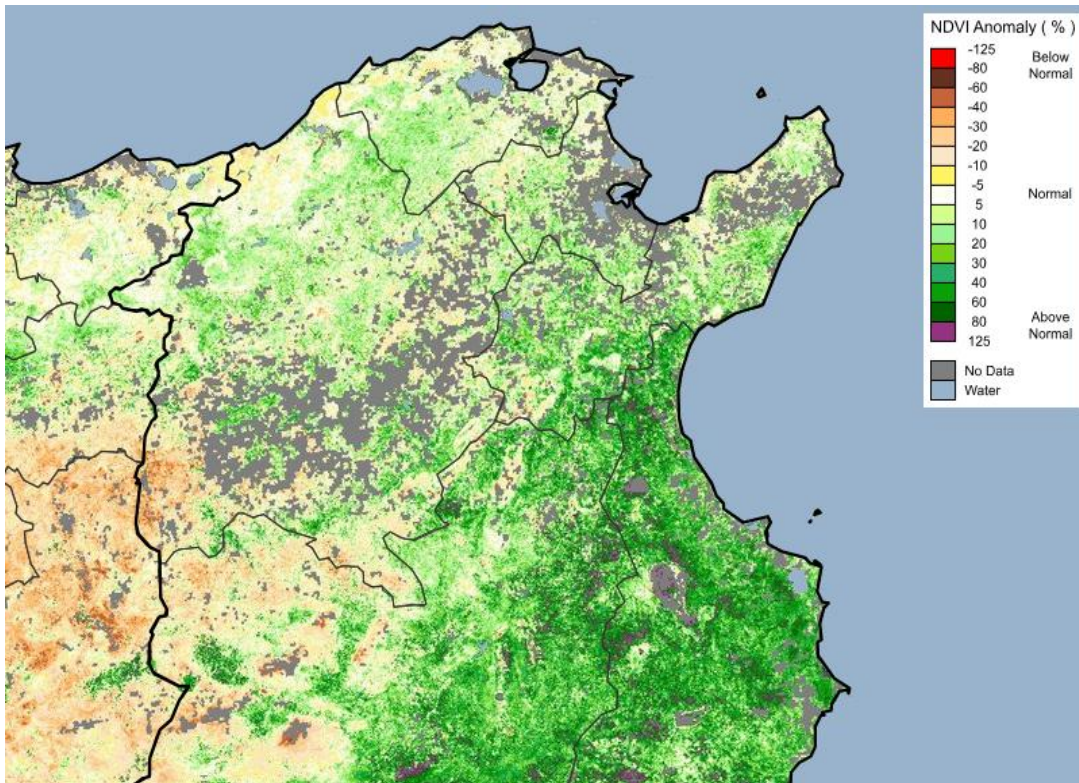
Source: Tunisian Ministry of Agriculture; *FAS/Tunis forecast (MY 25/26)

Figure 1: Wheat and Barley Yields by Market Year (MT/HA)



Source: Official USDA estimates; FAS/Tunis forecast (MY 25/26)

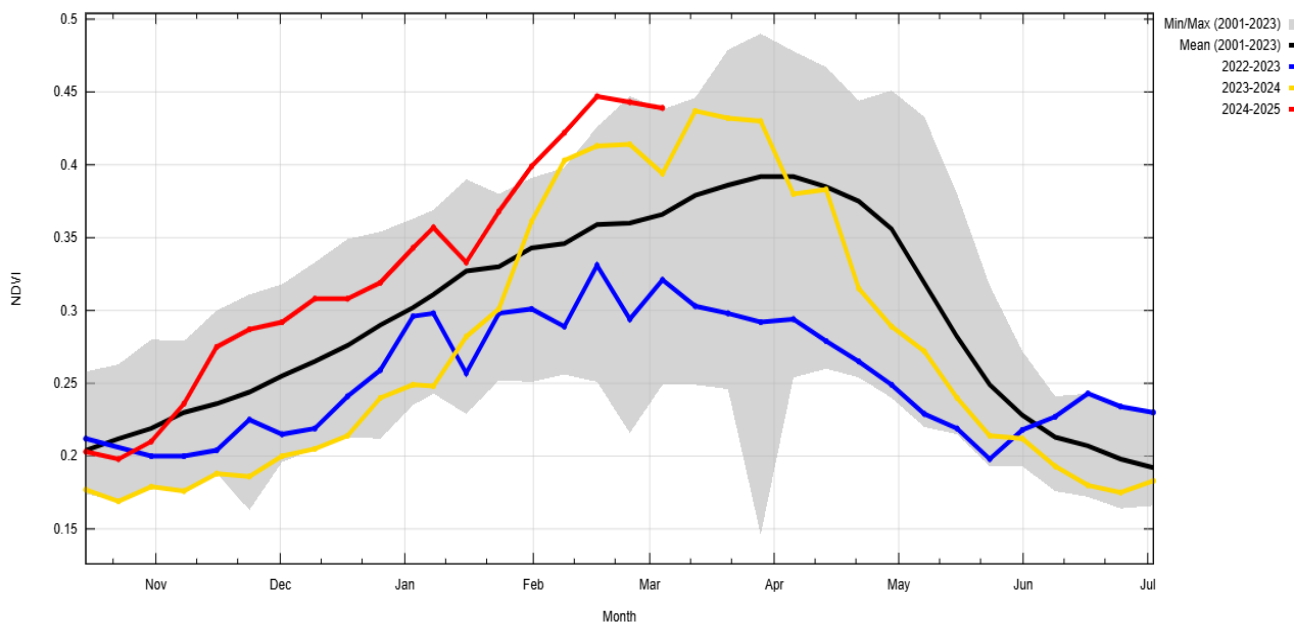
Image 1: Aqua MODIS NDVI Anomaly, 02/26/2025-03/05/2025 Range



Description: The satellite-derived Normalized Difference Vegetation Index (NDVI) depicts current vegetation vigor compared to previous periods.

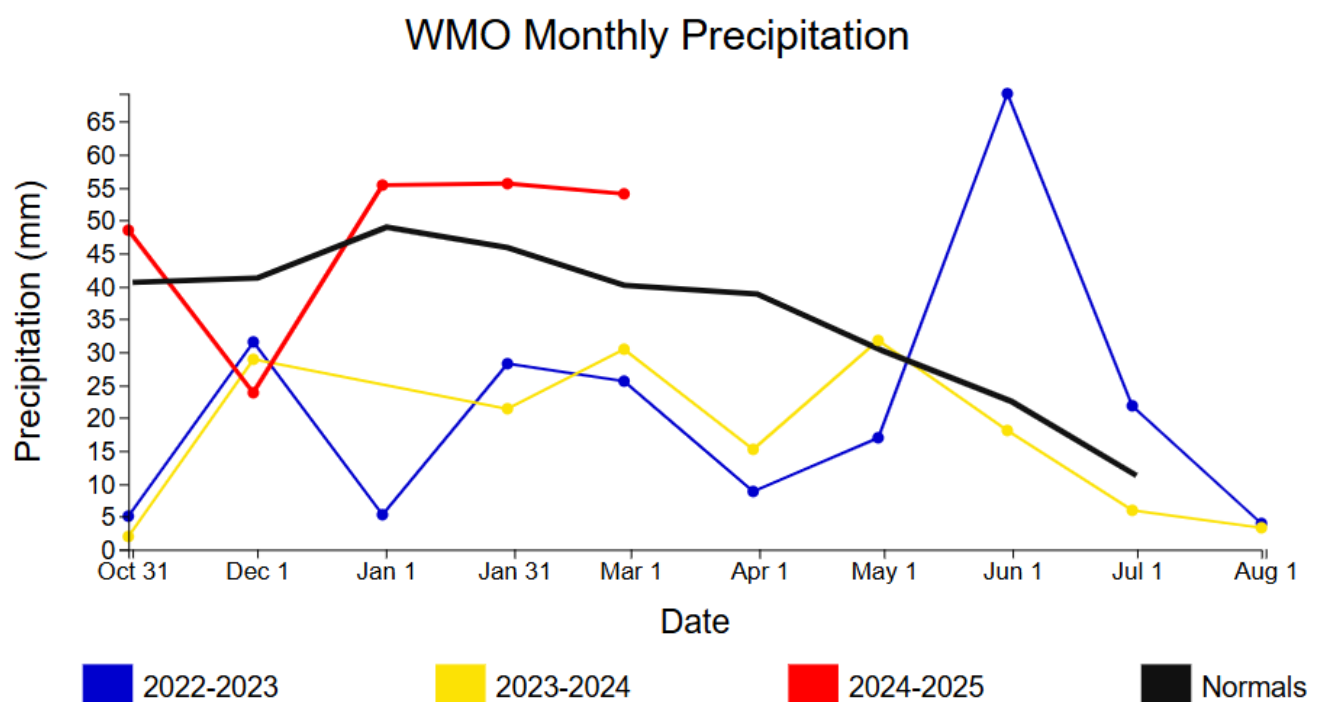
Source: NASA/GSFC/GIMMS, USDA/FAS/IPAD

Figure 2: Tunisia Aqua MODIS NDVI 8-day, Times Series October-July



Source: NASA/GSFC/GIMMS, USDA/FAS/IPAD

Figure 3: WMO Monthly Precipitation, Times Series October-July



Source: USDA/FAS/IPAD/GADAS

Production Policy: Tunisia maintained MY 2024/25 farm-gate prices for domestic wheat and barley as follows:

- Durum Wheat: 1,300 TD/MT (\$421/MT),
- Common Wheat: 1,000 TD/MT (\$324/MT),
- Barley: 800 TD/MT (\$259/MT).

Other Tunisian domestic support policies remain unchanged from MY 2024/25. To achieve the government's self-sufficiency goal of reaching average annual production of 3 MMT for cereals, of which 1.7 MMT is durum wheat, state-sponsored programs include:

- Subsidizing certified seeds,
- Subsidizing 50 percent of agricultural machinery costs and 40-50 percent of irrigation equipment costs,
- Subsidizing irrigation water \$0.07/m³ (32 percent of the cost) to encourage increasing irrigated wheat area to 120,000 HA,
- Improving access to seasonal credit for grain producers
- Providing technical assistance to irrigated wheat farmers to increase yields.

Tunisia's Office des Cereales (Cereal Board) maintains an official monopoly on the inventory, purchase, and sale of wheat and barley for the domestic market. However, collection of local production has been privatized for both crops. Collection by the Cereal Board currently accounts for 40-60 percent of wheat production and 10-40 percent of barley production. A portion of the rest is kept by farmers to be used as seeds the following crop year and another portion is marketed through traditional channels (farmer to farmer and or in traditional open markets)

Consumption

Wheat

Post expects total domestic consumption in MY 2025/26 to slightly increase to 2.99 MMT reflecting the average population growth trend of approximately two percent. Per capita consumption is estimated at around 236 kg in MY 2025/26, with a population of 12.665 million. Total domestic consumption in MY 2024/25 is estimated to slightly increase as well to 2.885 MMT compared to MY 2023/25 reflecting same growth trend.

Consumer Policy: Tunisia subsidizes wheat consumption, guaranteeing the entire population access to wheat flour, semolina, and bread at prices below market rates. Bread prices are a sensitive issue, and as a result, wheat subsidies have remained unchanged despite the extreme burden they place on the state budget.

Barley

Tunisia's barley consumption in MY 2025/26 is forecast at 940,000 MT, reflecting the same average growth trend of roughly two percent. Barley is consumed mainly in feedlots and as supplemental feed, especially when and where rangelands are stressed. USDA crop survey indicates that rangeland for Tunisian sheep and goats is in well above average condition in MY 2024/25, which is estimated to lower demand on barley during the same marketing year.

Trade

Wheat

Post expects imports to be 1.7 MMT in MY 2025/26 based on consumption, stable stock levels, and well above average production. It represents a 10% decrease to import estimate in MY 2024/25. In MY 2024/25 Post estimates import at 1.9 MMT to reflect a lower final domestic production and Tunisia efforts to reach again historical stocks levels with a slightly improved procurement capacity.

Post's import estimate includes the assumption that Tunisia strives to maintain stocks equivalent to approximately two months' supply, i.e., the minimum quantity necessary to ensure an uninterrupted supply chain.

Tunisia is a highly price sensitive wheat buyer with the main exporters to Tunisia being over the last 4 years Russia, Ukraine and to lesser extend others black sea countries, France, and Italy.

Trade Policy: Tunisia’s Cereal Board controls imports and exports of wheat and wheat products. As the monopoly importer, all Cereal Board wheat tenders are destined for domestic use. Imported wheat is sold on the market at a subsidized rate, and the difference is covered by the Tunisian government. Despite concerns that the wheat subsidy is becoming too expensive for the Tunisian budget, there is no indication that the subsidy program will change or that imports will decrease.

Private millers may import wheat under a temporary admission regime but are required to export the finished product after milling occurs in Tunisia. Exports of Tunisian wheat products require an export license.

Barley

MY 2025/26 barley imports are forecast to fall to 450,000 MT due to increased domestic production.

Trade Policy: In order to bring some relief to the state budget and in compliance with some of international institutions and donors’ guidance, Tunisia, after a test period last market year decided to confirm barley imports liberalization after a first failed experience twenty years ago. Now, private sector companies are allowed to import directly barely instead of going through Tunisia’s Office des Cereales (Cereal Board).

Table 3: Tariff Table for Wheat, Barley, and Wheat Products

HS code	Description	Average of AV Duties	Exchange Rate NC/US\$
1001	Wheat and meslin.	0	2.15
1003	Barley	36	2.15
1101	Wheat or meslin flour.	36	2.15
190219	Uncooked pasta, not stuffed or otherwise prepared, not containing eggs	36	2.15
190230	Pasta, cooked or otherwise prepared (excl. stuffed)	36	2.15
190240	Couscous, whether or not prepared	36	2.15

Source: World Trade Organization: Tariff Download Facility

Table 4: Wheat Production, Supply and Distribution

Wheat Market Year Begins Tunisia	2023/2024		2024/2025		2025/2026	
	Jul 2023		Jul 2024		Jul 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	329	329	500	536	0	551
Beginning Stocks (1000 MT)	830	830	300	300	0	474
Production (1000 MT)	442	442	1150	1179	0	1350
MY Imports (1000 MT)	1829	1829	1800	1900	0	1700
TY Imports (1000 MT)	1829	1829	1800	1900	0	1700
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	3101	3101	3250	3379	0	3524
MY Exports (1000 MT)	21	21	20	20	0	20
TY Exports (1000 MT)	21	21	20	20	0	20
Feed and Residual (1000 MT)	80	80	100	85	0	90
FSI Consumption (1000 MT)	2700	2700	2800	2800	0	2900
Total Consumption (1000 MT)	2780	2780	2900	2885	0	2990
Ending Stocks (1000 MT)	300	300	330	474	0	514
Total Distribution (1000 MT)	3101	3101	3250	3379	0	3524
Yield (MT/HA)	1.3435	1.3435	2.3	2.1996	0	2.4501

(1000 HA) ,(1000 MT) ,(MT/HA)
 MY = Marketing Year, begins with the month listed at the top of each column
 TY = Trade Year, which for Wheat begins in July for all countries. TY 2025/2026 = July 2025 - June 2026

Table 5: Barley Production, Supply and Distribution

Barley Market Year Begins Tunisia	2023/2024		2024/2025		2025/2026	
	Jul 2023		Jul 2024		Jul 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	108	108	350	225	0	290
Beginning Stocks (1000 MT)	210	210	108	108	0	250
Production (1000 MT)	90	90	550	272	0	500
MY Imports (1000 MT)	768	768	750	800	0	450
TY Imports (1000 MT)	701	701	750	800	0	450
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	1068	1068	1408	1180	0	1200
MY Exports (1000 MT)	0	0	0	0	0	0
TY Exports (1000 MT)	0	0	0	0	0	0
Feed and Residual (1000 MT)	880	880	1100	850	0	860
FSI Consumption (1000 MT)	80	80	80	80	0	80
Total Consumption (1000 MT)	960	960	1180	930	0	940
Ending Stocks (1000 MT)	108	108	228	250	0	260
Total Distribution (1000 MT)	1068	1068	1408	1180	0	1200
Yield (MT/HA)	0.8333	0.8333	1.5714	1.2089	0	1.7241

(1000 HA) ,(1000 MT) ,(MT/HA)
 MY = Marketing Year, begins with the month listed at the top of each column
 TY = Trade Year, which for Barley begins in October for all countries. TY 2025/2026 = October 2025 - September 2026

Attachments:

No Attachments