

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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## Tunisia

**Post:** Tunis

### Record Citrus Crop Highlights Market Constraints

**Report Categories:**

Citrus

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**Report Highlights:**

Following record production in 2016/17, Tunisia citrus faces lingering constraints to capture value-added processing and export markets. France remains the largest export market for Tunisia citrus; however, efforts are being undertaken to reorient exports to the Gulf, Algeria, and Russia. Citrus production is composed of (in rank order) Maltese oranges, navel oranges, clementines, lemons, and mandarins.

## Area

While citrus production started before French colonization (1881-1956), it only began to take off in 1918 along with domestic demand. Citrus cultivation developed mainly in the peninsula of Cap Bon (Governorate of Nabeul) benefiting from good soil, water resources, and climate, where winter frosts are rare. Other production areas were established in Greater Tunis and Bizerte and, in recent years, area has expanded to the land-locked governorates, including Kairouan and Jendouba. Tunisia's citrus orchards currently cover an area of 27,000 HA and total 7 million trees, accounting for 1.3% of fruit tree area, a distant third to olives and dates.

Governorate	Nabeul	Ben Arous	Bizerte	Kairouan	Greater Tunis	Jendouba	Beja	Other
Area (HA)	18,630	1,620	1,350	1,350	1,080	1,080	540	1,350
% of Total	69	6	5	5	4	4	2	5

Source: Ministry of Agriculture

### Tunisia: Citrus Production Areas



Source: FAS Tunis using Google Maps

## Production

Tunisia's citrus production sector includes 12,000 farmers with 70 percent of farms under 2 HA and 14 conditioning plants.

Harvest is ongoing throughout the year but concentrated in January-April.

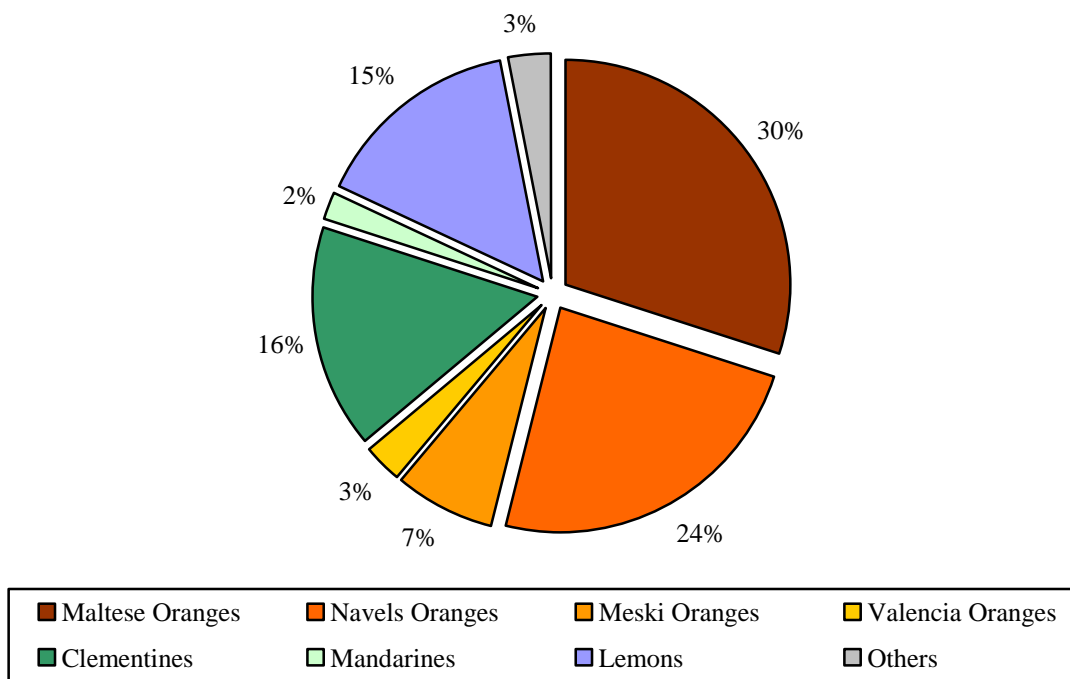
**Tunisia Citrus Production Calendar**

	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
Maltese Oranges												
Navel Oranges												
Clementines												
Mandarins												
Lemons												

Source: FAS Tunis

Maltese oranges, navel oranges, clementines, lemons, and mandarins are the leading citrus crops grown in Tunisia. U.S.-origin varieties include Navelina (California), Thomson Navel (California), Encor H.B. Frost, (California), Fortune (California), Minneola (Florida), Nova (Florida), Wilking (California), Eureka (California), Marsh Seedless (Florida), Ruby (Florida) and Star Ruby (Texas).

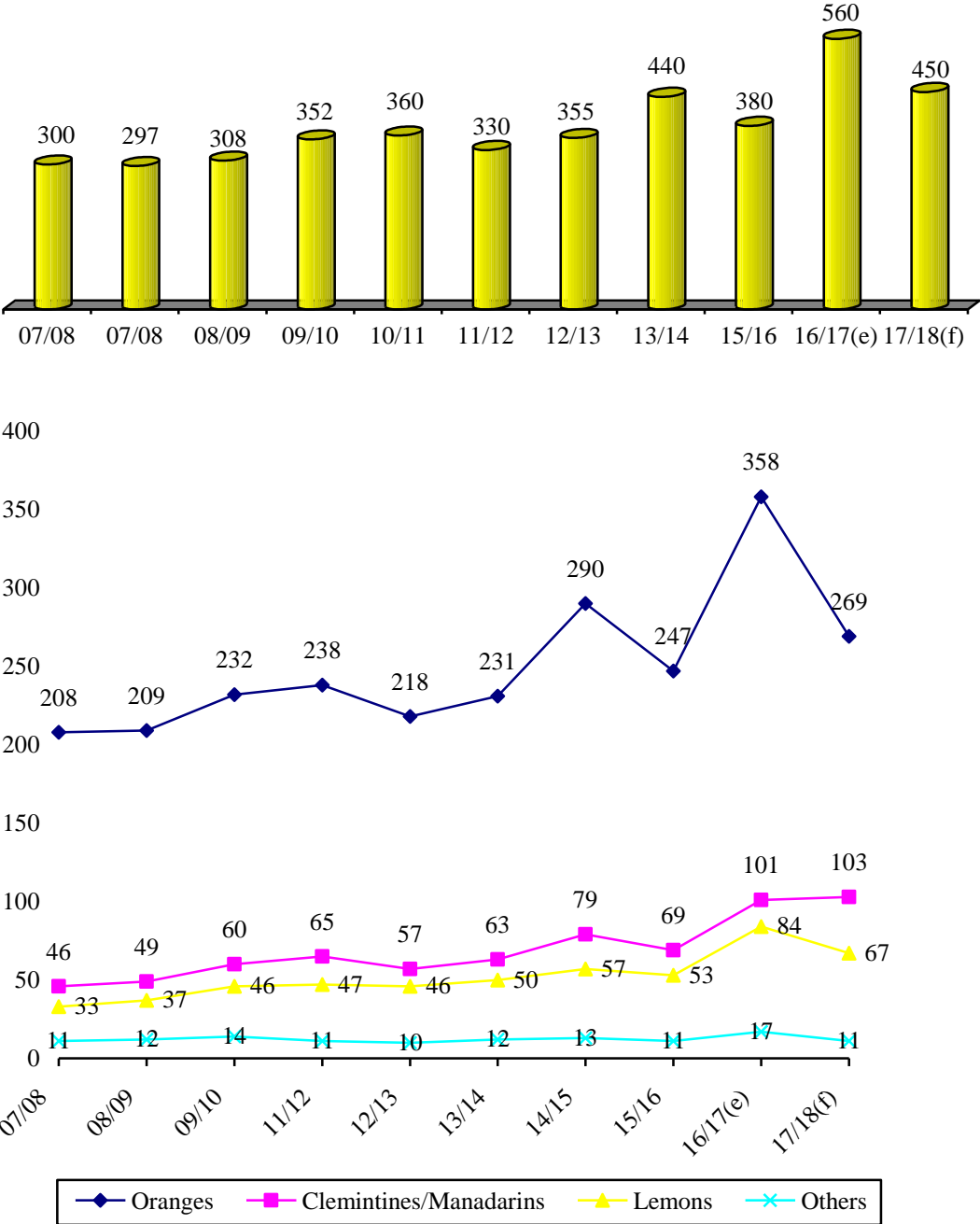
**Tunisia Citrus Production by Crop in 2016**



Source: Ministry of Agriculture

Production has steadily increased during the last decade from 300,000 MT in MY 2007/08 as new orchards have come online, reaching an all-time record high in MY 2016/17 with 560,000 MT, thanks largely to very favorable weather conditions. However, at the same time, post-harvest loss was also significant in 2016/17, when around 5,000 MT of oranges reportedly spoiled as a result of bottlenecks to export and inelastic domestic demand.

**Tunisia Citrus Production by Marketing Year (Oct-Sep), 1,000 MT**



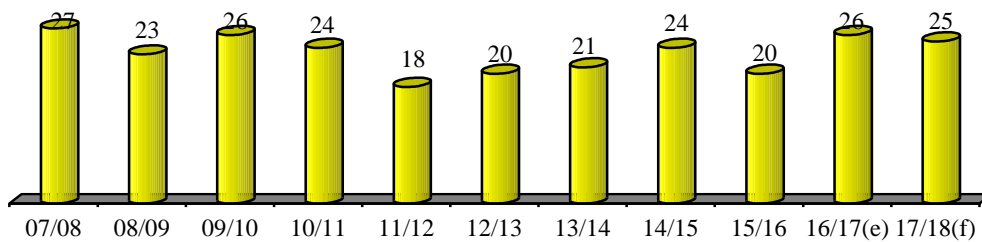
Source: Ministry of Agriculture (2007/08-2015/16); FAS Tunis (2016/17-2017/18)

## Trade

### Exports

Tunisia relies on exports for approximately five percent of its production. Roughly 90% of its citrus exports consist of maltese oranges. Also, roughly 90% of its citrus exports are destined for France, although attempts are being made to increase exports to the Gulf, Algeria, and Russia. A new freight shipping line between Tunisia and Russia has reduced transportation from 15 to 6 days. Insufficient cold chain limits already short shelf-life of Tunisia's maltese oranges, which in general, should be consumed within one week of harvest.

**Tunisia Citrus Exports by Marketing Year (Oct-Sep), 1,000 MT**



Ministry of Agriculture (2007/08-2015/16); FAS Tunis (2016/17-2017/18)

Source:

### Imports

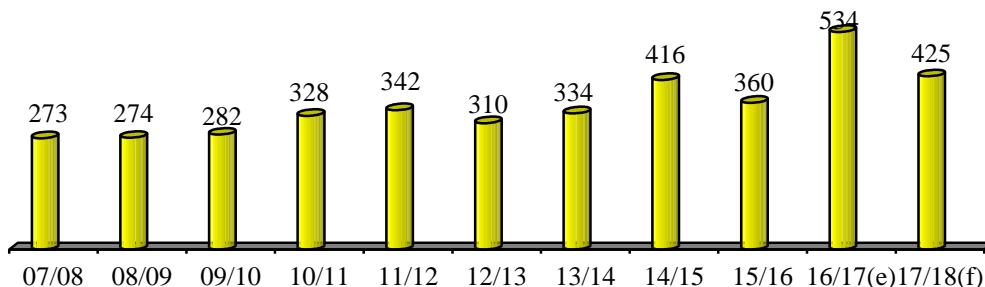
Tunisia restricts fresh citrus imports in accordance with a Ministry of Agriculture [Order](#), dated June 26, 2015.

### Consumption

Most citrus is consumed fresh, with per capita consumption steadily increasing in recent years, with an exception jump in 2016/17 following the bumper crop and government efforts to encourage consumption. The government targets long-term consumption at 40 kg/person.

Roughly 70% of Tunisia's citrus arrives to the final consumer through informal marketing channels while the remainder is routed through wholesale markets.

**Tunisia Citrus Consumption by Marketing Year (Oct-Sep), 1,000 MT**



Source: Ministry of Agriculture (2007/08-2015/16); Post (2016/17-2017/18)

Excluding a few local small-scale producers, Tunisia lacks a commercially significant processing facility. As a result, Tunisia does import orange juice, most of which comes unfrozen from Algeria – and some of which is manufactured using Tunisian oranges.

**Countries Export Statistics (Partner Country: Tunisia)**  
**Commodity: 200912, Orange Juice, Not Frozen, Of A Brix Value Not Exceeding 20**

Year Ending: September				
Country	Unit	Quantity		
		MY 2013/14	MY 2014/15	MY 2015/16
Algeria	T	12	217	1,623
Turkey	T	12	7	11
Austria	T	9	8	8
Portugal	T	10	3	4
Cyprus	T	0	10	0
Spain	T	4	0	0
<b>TOTAL</b>		<b>47</b>	<b>245</b>	<b>1,646</b>

Source: Global Trade Atlas

**Countries Export Statistics (Partner Country: Tunisia)**  
**Commodity: 200911, Orange Juice, Frozen, Whether Or Not Sweetened**

Year Ending: September				
Country	Unit	Quantity		
		MY 2013/14	MY 2014/15	MY 2015/16
Spain	T	70	54	108
Brazil	T	19	37	47
France	T	69	0	24
Italy	T	588	0	0
<b>TOTAL</b>	<b>T</b>	<b>746</b>	<b>91</b>	<b>179</b>

Source: Global Trade Atlas

## Policy

The government's target is to reach average annual production of 450,000 MT by 2025, of which 50,000 MT is exported. The plan includes the following:

- An aging citrus tree renewal plan, which targets 34 percent of citrus trees
- Plans for a new orchards
- Upgrading nurseries and irrigation systems
- Subsidizing 70% of the cost of maltese orange seedlings
- Increasing yields through on-farm technical assistance and a national citrus disease protection program to provided free or subsidized pesticides and traps to flight Medfly
- Training specialized labor
- Promoting citrus exports as an important source of foreign hard currency
- Promoting domestic consumption of oranges

## Production, Supply, and Distribution Tables

Oranges	2015/2016		2016/2017		2017/2018	
Market Begin Year	Oct 2015		Oct 2016		Oct 2017	
Tunisia	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	0	13,500	0	13,500	0	13,500
Area Harvested	0	11,000	0	12,500	0	11,500
Bearing Trees	0	2,800	0	3,000	0	2,800
Non-Bearing Trees	0	500	0	300	0	500
Total No. Of Trees	0	3,300	0	3,300	0	3,300
Production	0	247	0	358	0	269
Imports	0	0	0	0	0	0
Total Supply	0	247	0	358	0	269
Exports, Fresh	0	18	0	23	0	22
Fresh Dom. Consumption	0	212	0	311	0	231
For Processing	0	17	0	24	0	16
Total Distribution	0	247	0	358	0	269

(HECTARES) ,(1,000 TREES) ,(1,000 MT)

Mandarins/Clementines	2015/2016		2016/2017		2017/2018	
Market Begin Year	Oct 2015		Oct 2016		Oct 2017	
Tunisia	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	0	8,500	0	8,500	0	8,500
Area Harvested	0	7,500	0	8,000	0	7,500
Bearing Trees	0	1,900	0	2,100	0	2,000
Non-Bearing Trees	0	300	0	100	0	200
Total No. Of Trees	0	2,200	0	2,200	0	2,200
Production	0	69	0	101	0	103
Imports	0	0	0	0	0	0
Total Supply	0	69	0	101	0	103
Exports, Fresh	0	1	0	2	0	2
Fresh Dom. Consumption	0	65	0	96	0	97
For Processing	0	3	0	3	0	4
Total Distribution	0	69	0	101	0	103

(HECTARES) ,(1,000 TREES) ,(1,000 MT)

<b>Lemons</b>	<b>2015/2016</b>		<b>2016/2017</b>		<b>2017/2018</b>	
<b>Market Begin Year</b>	<b>Oct 2015</b>		<b>Oct 2016</b>		<b>Oct 2017</b>	
<b>Tunisia</b>	<b>USDA Official</b>	<b>New Post</b>	<b>USDA Official</b>	<b>New Post</b>	<b>USDA Official</b>	<b>New Post</b>
<b>Area Planted</b>	0	4,000	0	4,000	0	4,000
<b>Area Harvested</b>	0	3,500	0	3,500	0	3,500
<b>Bearing Trees</b>	0	1,000	0	1,100	0	1,000
<b>Non-Bearing Trees</b>	0	200	0	100	0	200
<b>Total No. Of Trees</b>	0	1,200	0	1,200	0	1,200
<b>Production</b>	0	53	0	84	0	67
<b>Imports</b>	0	0	0	0	0	0
<b>Total Supply</b>	0	53	0	84	0	67
<b>Exports, Fresh</b>	0	0	0	0	0	0
<b>Fresh Dom. Consumption</b>	0	33	0	54	0	47
<b>For Processing</b>	0	20	0	30	0	20
<b>Total Distribution</b>	0	53	0	84	0	67
(HECTARES) ,(1,000 TREES) ,( 1,000MT)						