



UNITED NATIONS INDUSTRIAL DEVELOPMENT ORGANISATION

INVESTMENT PROMOTION UNIT – UNIDO

TUNIS

**THE AGRICULTURAL, AGRIBUSINESS
AND FISHING SECTOR IN TUNISIA**

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INTRODUCTION

Both agriculture and fishing play a major role in Tunisian economy. Indeed, besides the fact that they guarantee food security to the country, they highly contribute to the expansion of the less developed areas.

Agribusiness has always had a strategic role. Abundance of raw material together with national legislation and overture to foreign trade, have made this sector very attractive to foreign investors.

The Tunisian government has set up incentive measures in order to encourage foreign investments, mainly those using innovative technologies and directed towards exportation.

It offers several comparative advantages particularly in the following sectors: vegetable oil production, fruit and vegetables (fresh and processed), pasta, wine and fishing products. It is the world's biggest date exporter and holds the fourth place in the selling of olive oil.

Foreign investors are principally attracted by production costs. For instance, labour costs are below the average cost in not only the European Union (EU) countries but also in Eastern ones.

Tunisia's geographic proximity to Europe enables Tunisian products to reach the Mediterranean northern side's markets at a very short time and at studied prices.

The Free Trade Agreement (FTA) signed with the EU in 1995 opened wide prospects for the country's potentialities by setting special regulations for exchanging agricultural products within a process that will progressively be dismantled by 2008.

Three protocols have been drawn up in order to regulate the entry of Tunisian agricultural products into the EU. All of them will be submitted to a revision every five years. (The third one will be drawn up during 2005).

In a more detailed way:

- The first protocol deals with tariff quotas and customs duties reduction, and sets a schedule for the export of Tunisian agricultural products to the EU;
- the second protocol regulates export of fishing products to the EU;
- the third protocol states import regulations regarding agricultural products coming from the EU to Tunisia.

FOREIGN INVESTMENTS IN THE SECTOR OF AGRICULTURE, LIVESTOCK FARMING, FISHING AND AGRIBUSINESS

Investing in the sector of agriculture, livestock farming, fishing and agribusiness can be done freely providing it complies with the legislation and the regulations in force.

The Investment Promotion Code provides a complete legal framework, regulating activities in all of these sectors and making a clear distinction between production and processing. These Code's measures apply to investment operations relative to creation, extension, renewal, redevelopment or change of an activity.

Investment projects in agriculture, livestock farming and fishing are subject to a declaration at the Agricultural Investment Promotion Agency (AIPA). However, the declaration of investment in process activities (as an initiative of an industrial type) has to be done at the Industry Promotion Agency (IPA).

Foreigners can invest freely in the primary sector, by renting farmlands. Nevertheless, in no means can these investments lead to the purchase or appropriation of these lands.

As far as agribusiness is concerned, investments in this sector face no obstacles.

If foreigners are not submitted to the offshore scheme, their participation in service activities intended for agriculture and fishing, remains submitted to the Investment Higher Committee's approval if it exceeds 50% of the firm's share capital.

Apart from investments in exclusively export activities, obtaining advantages assigned by the Code depends upon the making of a financing scheme providing a minimum rate of equity capital (1).

Investments benefiting from the Investment Code's incentive measures and aiming at agricultural and fishing development are those concerned by:

¹ The minimum rate of equity capital has been set up by Decree n° 94-489 on 21 February 1994.

It states that:

Art. 1 In order to obtain advantages assigned by the Investments Code, non off-shore companies – when making the project's financing scheme – have to provide a minimum rate of equity capital at:

- 30% of the investment cost regarding:

- Industrial projects;
- Agricultural and fishing projects ("C" category);
- Touristic projects;
- Projects carried out in other sectors.

- 25% of the investment cost regarding:

Projects carried out by new promoters included in the definition provided by article 44 of the Investment Code.

-10% of the investment cost regarding agricultural and fishing projects ("A" and "B" categories), including those set up by new promoters.

Art. 2

- the exploitation of available natural resources in the purpose of increasing agricultural and fishing production;
 - modernization of the agricultural and fishing sector and the improvement of its productivity;
 - first-stage processing of agricultural and fishing products as well as their packaging;
 - service activities related to agricultural and fishing² production.
-

² List of activities stated by the Code:

1) Agricultural activities:

- Large scale farming
- Horticulture
- Arboriculture (including olive trees)
- Conservation works of water and grounds
- Production of seeds and plants
- Floriculture
- Greenhouse cultivation
- Sylvo-pastoral production
- Stocks (including aviculture, rabbit-breeding (rabbitry), apiculture, etc.)

2) Fishing activities:

- Inshore fishing
- Fire fishing
- Trawling
- Aquaculture.

3) Activities related to first-stage processing of agricultural and fishing products as well as their packaging:

- Milk processing in production plants, excluding yoghurt production;
- Canned and semi-canned fruit and vegetables as well as fishing products;
- packaging of agricultural and fishing products;
- Refrigeration, freezing, drying and leophylization of agricultural and fishing products ;
- Sawing, conditioning and processing of forestry products.

4) Services related to agriculture and fishing:

a) Services related to farming activities:

- Valorisation of sub-products of a vegetable or animal origin;
- Livestock artificial insemination;
- Veterinary surgeries and clinics;
- Veterinary and agricultural analyses laboratory;
- Advising regarding farming matters;
- Milk collection;
- Cereal collection and stocking;
- Conditioning and marketing of seeds;
- Ground preparation, harvest and protection of plants;
- Carriage of fresh milk;
- Refrigerated transport of red meat.

b) Services related to fishing:

- Assembly of fishing equipment and material;
- Integrated circuit for the distribution of fishing products;
- Bacteriological and chemical veterinary laboratories;
- Shell ice production;
- Refrigerated transport of fishing products.

In the agricultural and fishing sector, firms exporting 70% of their production at least, are considered as entirely-export companies.

Such firms are also allowed to sell the remaining 30% on the local market without having to pay income tax.

They enjoy tax incentives specific to the legal scheme (off-shore) in the agricultural sector, apart from those common to all the activities stated by the Investment Code.

As entirely – export firms, these companies (agricultural or agro-industrial) – are exempt from paying corporate tax and personal tax on incomes coming from export operations, over a period of ten years and starting from the first scheduled operation. These taxes have to be paid starting from the eleventh year, after deducting 50% from export profits.

Exemption from V.A.T. (Value Added Tax) and Consumption tax is granted systematically when applying for it. However, it should be noted that off-shore companies have the status of being "subject to but exempt from taxes companies", therefore they have to fill in a monthly tax return, submitted to a monthly currency, at the regional Tax Office.

Nonetheless, off-shore companies are submitted to the "pay as your earn" (P.A.Y.E.) system and to the payment of:

- duties and taxes on saloon cars (annual taxes on circulation and re-registration);
- compensation single tax on road transport;
- taxes on maintenance and cleansing operations;
- duties and taxes collected as direct services in accordance with the legislation in force;
- taxes and contributions to social security.

When getting recruited, individuals holding a foreign nationality and being non-resident are free to opt for a social security scheme other than the Tunisian one.

Moreover, subscribing to the initial capital of entirely-export companies or increasing it, results in a deduction of invested incomes or profits from gross incomes or profits that are subject to taxation on personal income or to corporate tax.

Eventually, all investments realised by entirely-export companies are entitled to a deduction of reinvested profits from gross profit, which is subject to corporate tax.

Entirely-export firms are allowed to employ up to four clerks and/or executives.

Concerning equipment importation and/or purchase, companies operating in agriculture, livestock farming and fishing, have the following advantages:

- Regarding imported equipment that has no equivalent locally, customs duties are rated at the single tax of 10% (worked out according to the value of the imported asset), while they are granted exemption from equivalent effect taxes, V.A.T. and taxes on assets intended for internal consumption (called "consumption tax" – C.T.).
- As for equipment made in Tunisia, it is granted exemption from V.A.T. and C.T.

Investments in agriculture/agribusiness and fishing benefit from a set of financial incentives, granted by Tunisian authorities according to the investment's importance and to the area in which the project is going to be established (incentives are granted to firms set up in Regional Development Areas).

Projects are divided into three categories, according to the investment cost³.

³ The following are criteria according to each category :

- Investments regarding agricultural activities.

"A" Category

Investments lower than or equal to 40.000 Tunisian Dinars (TD)

The file is handed over to the Agricultural Development Regional Authority (A.D.R.A.)

"B" Category

Investments between 40.000 and 150.000 TD

The file is handed over to the Agricultural Investment Promotion Agency (A.I.P.A.)

"C" Category

Investments higher than 150.000 TD

The file is handed over to A.I.P.A.

- Investment in fishing and aquaculture activities.

"A" Category

Investments lower than or equal to 60.000 TD in inshore fishing

The file is handed over to A.D.R.A.

"B" Category

Investment between 60.000 and 300.000 TD, in inshore and pelagic fishing as well as aquaculture.

The file is handed over to A.I.P.A.

"C" Category

Investment higher than 300.000 TD in fishing projects and aquaculture.

The file is handed over to A.I.P.A.

- All investments in first-stage processing activities and services related to agriculture and fishing, are considered as belonging to the "C" category.

Once the file studied and the category to which the project belongs set, a contribution to the feasibility study fees is granted together with an investment subsidy and a financial aid for the launch of the project.

The government contributes by up to 1% of the investment global cost, to the project's feasibility study fees. Whereas projects belonging to the "A" category are not entitled to these incentives, those belonging to the "B" category can benefit from such a financing operation for up to 1.500 TD, and up to 5.000 TD when the project belongs to the "C" category.

Because of the strategic importance of this sector for national economy, the Tunisian Government has made concessions to grant subsidies, the amount of which is set according to the project's size and economic impact.

Projects belonging to the "A" category will be financed at a rate of 25% of the investment global cost and those belonging to the "B" category will be financed at a rate of 10% of the investment global cost. As for those belonging to the "C" category, they will be financed at the rate of 7%.

Other activities closely related to the investment will also be financed. For instance, every project, regardless of its category, will benefit from a 15% subsidy for the purchase of farm equipment (15% of the equipment cost). Regarding the implementation of an irrigation system, projects belonging to the "A" category will be financed at the rate of 60% of the system's cost while those belonging to the "B" category, they will be financed at the rate of 50%. As for those belonging to the "C" category, they will be financed at the rate of 40%.

Additional financing operations are planned for projects which are implemented in areas where weather conditions are not favourable (the six Governorates in the south of Tunisia: Gabes, Gafsa, Tozeur, Kebili, Medenine and Tataouine) and in fishing areas where resources are not sufficiently exploited (the northern part of the country except the Golf of Tunis). This is a subsidy which corresponds to 15 or 25% of the global investment cost within the county in which the project will be implemented.

Subsidies equivalent to 25% of the investment cost are planned for initiatives undertaken by contractors in some counties belonging to the Governorates of Gafsa, and the purpose of which is the conversion of former mining areas.

THE AGRICULTURAL SECTOR: THE SITUATION IN 2003

In 2003, the agricultural sector produced 13.8% of the gross domestic product and employed 20% of the Tunisian workforce. Lately, this sector has recorded an average annual growth of 3.6% despite the fact that agricultural production is considerably affected by the variable productive cycles from year to year notably as far as products such as olive oil – are concerned. Such products play an important part in export.

The global agricultural area is of 10.4 million hectares, about 4 million of which are cultivated: arboriculture (olive and almond trees in particular) lies over 2.1 million hectares, large-scale farming (cereals) takes up 1.5 million hectares whereas about 0.5 million hectares are allocated to vegetables and other irrigated cultivations.

Although agricultural production depends mostly on rainfall, Tunisia has good hydric resources. There are about 380.000 irrigated hectares although the country's hydric potentialities do not exceed 2.7 billion m³ surface water and 1.8 billion m³ underground water.

ORGANIC AGRICULTURE

In Tunisia, organic agriculture started to be developed in the 1990's following a demand for this type of product.

The Tunisian Government regulated this sector in 1999 and starting from the following year, the Technical Centre for Organic Agriculture was created in Chatt Meriem (Sousse). The global area allocated to organic agriculture moved from 300 hectares in 1997 to 16.600 in 2001, 74% (about 12.300 hectares) of which are intended for the production of olive oil, with over 60 producers. These are mainly located in the region of Sfax but an important number is in the north of the country, too.

The most recent figures regarding production date back to the year 2000. 400 tons of organic olive oil were produced. The bulk (over 90%) was intended for export. However, the dynamics of growth suffer from problems of structurization and management loopholes. Generally, production is sold retail, with expected capital losses as for local factories. Moreover the designation "Tunisian oil" does not have a great effect on European market. Besides the management loopholes, there is a lack of competence in marketing, making it hard for Tunisian organic products to have a good ranking worldwide.

THE AGRIBUSINESS AND FISHING SECTOR

A great part of agribusiness industry is composed of bakery trades and oil mills. As far as factories using industrial methods of work are concerned, there are about 650 of them employing over ten people. Fewer than a hundred exclusively operate in export trade.

The sector attained a luxuriant growth between 1995 and 1999. Indeed, during that period, the average annual production value was of 2.815 million TD and increased from 3.180 million TD in 1995 to 4.928 million TD in 1999.

During the following years, and due to bad olive oil production (the worst in 30 years), this sector's contribution to internal wealth decreased, causing a drop in the total contribution of the manufacturing sector's value added in national revenue.

Nevertheless, 2003 is considered as a turning point, by registering a 3% increase in agribusiness industry's contribution.

Tab n° 1: Evolution of the manufacturing industries' value added into real value (GDP⁴ percentage)

Industrial sector	1999	2000	2001	2002	2003
Agribusiness	12,8	7,6	-2,5	-0,5	3,0
Manufacturing ind. excluding agribusiness	4,1	6,4	9,2	2,4	0,2
Building equipment, ceramic and glass	4,9	7,8	4,5	4,0	1,1
Mechanical and electrical industries	6,3	6,8	14,0	3,5	5,1
Chemicals and rubber	3,4	5,0	2,5	3,5	0,3
Textile, leather and shoes	2,6	6,3	12,0	0,5	- 3,7
Diverse industries	5,2	6,1	6,0	4,0	3,5
Total manufacturing industries	5,6	6,6	6,9	1,9	0,7

(Source: Report 2004 T.C.B.⁵)

During 2001 and 2002, in addition to the slump in olive oil production which had a great impact on its sectors, other sub-sectors suffered from a drop in production, namely wine and certain fishing products. Such sectors are as important as that of olive oil and have an important economic impact because they are substantially intended for export. The increase in olive oil production in 2003 together with the achieved good results of canned food (fruit, vegetables and fishing products) have largely enhanced the sector.

⁴ Gross Domestic Product

⁵ Tunisian Central Bank

Tab n° 2: Production rates in agribusiness industry from 1999 to 2003 (quantities per thousand tons, unless otherwise stated).

Products	1999	2000	2001	2002	2003	Δ% 03/02
Cereal by-products						
Flour intended for bakery	628	656	648	644	656	1,9
Semolina	623	634	640	650	594	- 8,6
Pasta	137	140	142	150	145	- 3,3
Couscous	47	45	46	48	49	2,1
Concentrate	1.260	1.360	1.552	1.425	1.300	- 8,8
Milk by-products						
Milk (x 1.000 hl.)	2.670	3.190	3.090	3.340	3.120	- 6,6
Yoghurt (x 1.000 cartons)	670	740	750	840	784	- 6,7
Cheese	11,2	12,9	13,5	14,4	14,2	- 1,4
Canned food						
Tomato purée	124	127	77	98	106	8,2
Harissa (Chilli purée)	9,2	13,4	13,4	17	21	23,5
Canned fruit and vegetables	23	30	15,9	16,7	18,3	9,6
Canned fishing products	5,2	6,3	8,9	7,8	10,3	21,2
sugar and sweets						
Caster sugar	123	104	102	126	131	4,0
Lump sugar	21	14	14	15	15	0
Jam	31	33	36	38	39	2,6
Chocolate	5,2	5,3	6,8	7,4	8,2	10,8
Oil and fat						
Olive oil	180	225	115	30	72	140,0
Margarine and vegetable fat	29,2	32,3	29,1	35,9	43,2	20,3
Bottled vegetable oil	75	80	86	97	101	4,1
Beverages						
Mineral water (mil. lt.)	274	283	303	321	351	9,3
Sodas (in 1.000 hl.)	3.200	3.450	3.700	3.800	4.000	5,3
Beer (in 1.000 hl.)	912	930	1.089	1.100	996	- 9,5
Wine (in 1.000 hl.)	469	411	321	271	240	- 11,4

(Source: Report 2004 T.C.B.)

Annual investments in agribusiness have resumed growing. During 1995-2000, they recorded a continual growth moving from an amount of 130 million TD in 1995 to 241 million TD in 1999. However, beginning from the year 2000, the trend moved downward, reaching 200 million TD in 2002.

In 2003, a slight increase of over 5% was recorded, leading thus to the amount of 210 million TD, 90% of which were achieved by the private sector. The latter still covers the entire investments in the canned food industry, cereal processing and olive oil industry. However, public investments in this sector were in the form of plans to upgrade certain partly-state-owned companies in the tobacco sector (12 million TD), sugar production (5 million TD) and milk processing (4 million TD).

Tab. N° 3: Investments in the manufacturing industry (2001-2003)

Industrial sectors	Value (MillionTD)			Δ % 03/02	Composition %		
	2001	2002	2003		2001	2002	2003
Agribusiness	204	200	210	5,0	20,0	20,5	20,6
Building equipment, ceramic and glass	160	175	185	5,7	15,7	17,9	18,2
Mechanical and electrical industries	175	180	190	5,6	17,1	18,5	18,6
Chemicals and rubber	90	95	95	0	8,8	9,7	9,3
Textile, leather and shoes	263	185	195	5,4	25,7	19,0	19,1
Diverse industries	130	140	145	3,6	12,7	14,4	14,2
Total	1.022	975	1.020	4,6	100	100	100

(Source: Report 2004 T.C.B.)

About 800 small and medium-sized industries operate in this sector, 98 of which exclusively produce for export.

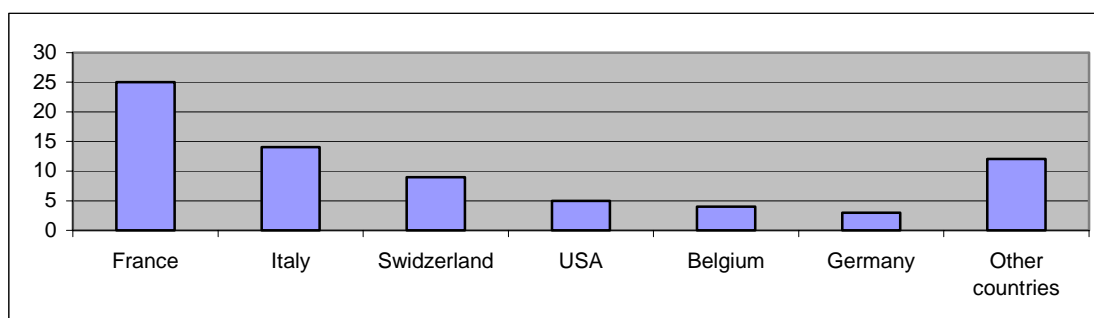
Tab. N° 4: Distribution of firms by sub-sectors

Activities	Tot. Export.	Non Tot. Export.	Total
Oil and fat production	11	173	184
Fruit and vegetables	4	49	53
Freezing	30	51	81
Fish industry	36	27	63
Cereals and by-products	5	284	289
Beverages	2	40	42
Milk and by-products	-	37	37
Sugar and by-products	2	29	31
Meat	-	16	16
Miscellaneous	11	48	59

(Source: IPA – April 2003)

Foreign investment in the industrial sector of agribusiness remains relatively low. Indeed 125 factories belong to partnerships. Only 69 of them employ more than ten people, 59 of which have a mixed capital. The remaining ten are the only ones to have an entirely foreign share capital.

Fig. n° 1: Distribution of agribusiness and fishing firms with a foreign contribution (firms employing more than 10 people)



(Source: IPA)

Government has set quantitative and qualitative targets in its Xth Plan of Development (2002-2006). Regarding the comprehensive target of strengthening manufacturing industry (with the achievement of an average annual growth of 5.1% at steady prices, a global contribution of 14.7% in overall investment, job creation at the rate of 29.5%, export over 80% and an over 10% growth rate of all the sector), global investment in the industrial sector of agribusiness shall reach the amount of 1.190 million TD as against 1.045 million TD in the previous Plan.

In fact, in spite of its weather and the various agricultural natural resources, Tunisia hasn't yet developed a structure that is able to fully capitalize on the international market's potentialities and tackle the demand in the local one.

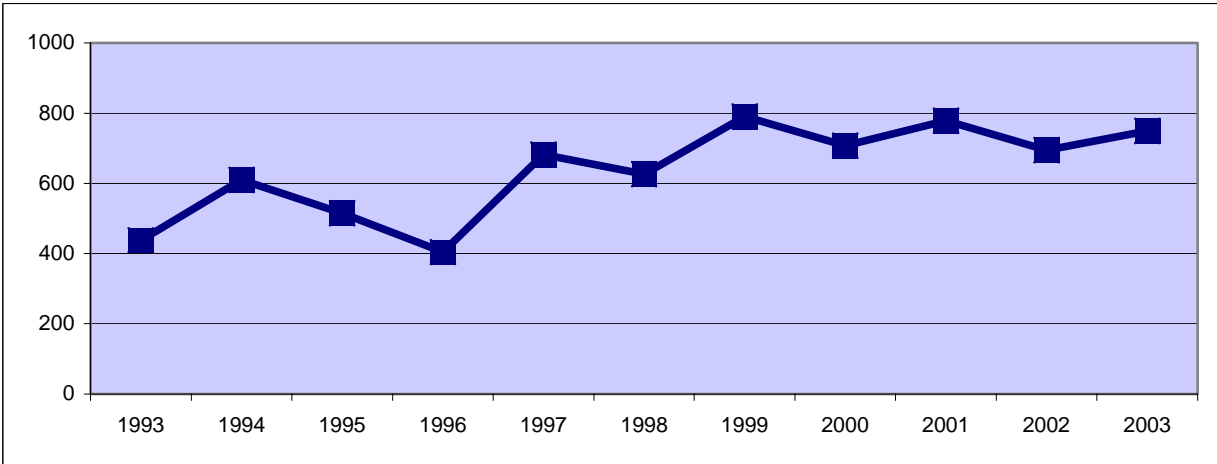
Competitiveness of assets produced in Tunisia could subsequently increase either by supplying technical and financial resources or by developing innovative management and planning strategies.

This is why the current overall target is to strengthen all high-tech sub-sectors (olive oil production, canned vegetables and fish) by promoting investments within an foreign partnership framework so as to develop exportation.

The balance of trade of agriculture, fishing and agribusiness.

About 12% of Tunisian exports are ensured by agriculture and fishing, reaching a global value of 749.9 million TD in 2003 (300.7 million TD from agriculture and fishing, 114.3 million TD of which from olive oil, and 449.2 million TD from agribusiness). Compared to 2002, a year particularly characterized by recession, a 7.9% growth was recorded in 2003.

Fig. 2: Export evolution (Years 1993-2003)



(Source: T.C.B.)

Italy, France, Spain and Libya cover more than 70% of Tunisian export sales.

Both Italy and Spain hold the first position as far as Tunisian exports are concerned. As a matter of fact each one of them has imported as much as 188.4 million TD. Italy principally imports olive oil (80 million TD), fishing products together with snails (66.3million TD), and dates (13.3 million TD). Spain imports fishing products (51.8 million TD), olive oil (23.6 million TD) and dates (9.5 million TD).

Libya comes third in the ranking and imports Tunisian products at the amount of 170.3 million TD: corn oil (67.3 million TD), feed (16 million TD, 10.5 million TD of which for cereals), milk and its by-products (8.2 million TD).

As for France, it holds the fourth position with an overall import value of 82 million TD. It principally imports fruit (46 million TD), spices and chilli puree known as 'Harissa' (7.3 million TD), as well as vegetables (3.5 million TD).

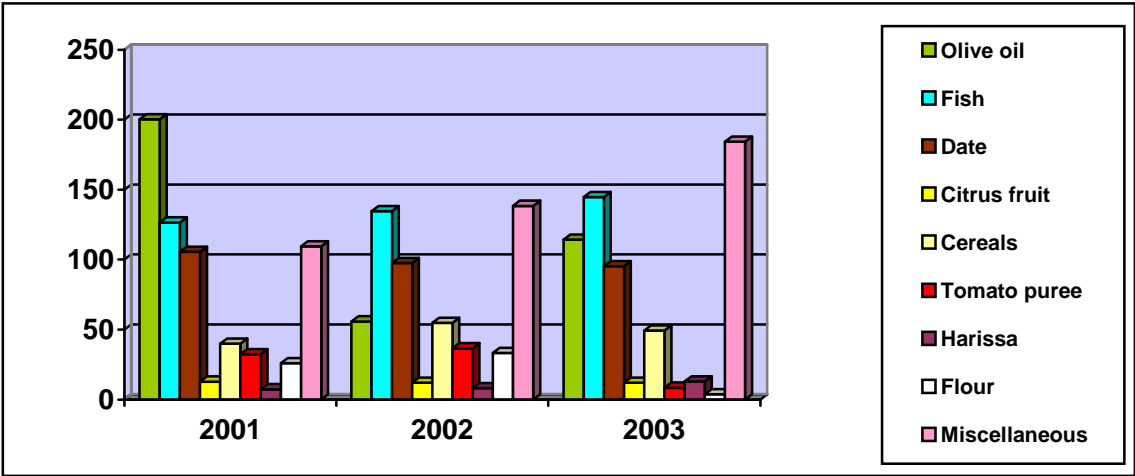
Some European countries such as Switzerland (17.9 million TD), Germany (14.5 million TD) and Holland (7.4 million TD) together with some African ones such as Morocco (15.6 million TD) and Niger (12.2 million TD), also import Tunisian products.

Tab. N° 5: Main exports in the agricultural, agribusiness and fishing sector – Year 2003

Products	Export value (2003)	Variation 2002-2003
Olive oil	114,3 Million TD	+ 104,8 %
Fishing and molluscs	144,7 Million TD	+ 7,5%
Fruit	112,8 Million TD	- 4,6%
<i>Including:</i> <i>Dates</i>	<i>95,2 Million TD</i>	<i>- 2,4%</i>
<i>Citrus fruit</i>	<i>11,9 Million TD</i>	<i>- 0,8%</i>
Vegetables	6,8 Million TD	- 5,5%
Cereal- based products	49,3 Million TD	- 9,9%
Wine	9,3 Million TD	+ 47%
Other products:		
Feed	21,4 Million TD	n.d.
Cheese and butter	9,6 Million TD	n.d.
Plants and flowers	5,7 Million TD	n.d.
Dried tomatoes	2,4 Million TD	n.d.

(Source CEPEX)

Fig. 3: Export products (2001-2003)



(Source CEPEX)

Regarding the balance of trade, although exports are unsteady (owing to the bad olive crop years), they quite balance with imports which have dropped considerably.

In 2003, imports were of 1261.6 million TD, which, compared to the preceding year meant a drop of 12,3%. The imported products were mainly composed of cereals and by-products, followed by vegetable oil.

Great Britain comes right after the United States and France, which are the main import suppliers.

In a more detailed way, in 2003 the balance of trade deficit regarding this sector decreased by one third. With a 31.2% drop, it moved indeed from a debit balance of 743.4 million TD in 2002 to 511.7 million TD, improving thus the import-export ratio by 14.6% and recording an increasing of 59,4% compared to the negative peak reached in 2002.

Tab. N° 6: Balance of trade figures regarding agriculture, fishing and agribusiness industry.

	Quantity (x 1.000 ton)			Value (million TD)			Variation % 02/01	
	2001	2002	2003	2001	2002	2003	Quantity	Value
EXPORTS				785,1	694,9	749,9		7,9
<i>Men's food</i>	516,9	457,1	351,3	675,7	556,5	565,6	- 23,1	1,6
including:								
Olive oil	94,5	22,5	39,9	200,3	55,8	114,3	77,3	104,8
Fishing Products	15,4	17,5	14,8	126,5	134,6	144,7	- 15,4	7,5
Dates	47,0	41,9	37,1	105,6	97,5	95,2	- 11,5	- 2,4
Citrus fruit	24,9	22,7	17,1	12,8	12,0	11,9	- 24,7	- 0,8
Cereal-based Products	31,0	51,1	57,2	39,9	54,5	49,3	11,9	- 9,9
Tomato purée	27,6	25,8	5,5	32,3	37,6	8,4	- 78,7	- 77,7
Harissa	2,5	2,9	5,2	7,3	8,1	12,9	79,3	59,3
Cereal flour	80,3	91,8	11,1	26,0	33,3	3,7	- 87,9	- 88,9
Miscellaneous				109,4	138,4	184,3		33,2
IMPORTS				1182,1	1438,3	1.261,6		- 12,3
<i>Men's food</i>	3459,6	4330,0	2.742,4	926,6	1143,0	894,1	- 36,7	- 21,8
including:								
Cereals including:	2861,6	3539,1	1.948,3	517,3	650,0	381,9	- 44,9	- 41,3
Soft grains	952,7	1013,9	773,6	169,1	179,8	137,9	- 23,7	- 20,2
Hard grains	501,6	801,8	472,4	116,4	195,8	125,1	- 41,1	- 38,5
Barley	585,6	825,3	75,1	97,5	120,0	11,2	-90,9	- 91,0
Corn	810,9	884,3	606,0	130,6	145,6	101,2	- 31,5	- 30,5
Sugar	235,3	342,9	326,2	79,9	110,7	87,7	- 4,9	- 20,8
Vegetable oil	201,6	185,2	199,4	100,2	151,5	136,8	7,7	24,3
Milk and by-products	11,4	23,4	29,1	29,1	34,7	41,8	24,4	20,5
Meat	0	0	1,4	0	0	4,7		
Tea	12,2	9,5	9,2	28,5	20,6	14,6	- 3,2	- 29,1
Coffee	12,6	12,6	5,6	21,0	15,2	5,9	- 55,6	- 61,2
Bananas	11,0	16,3	13,8	4,6	7,1	5,0	- 15,3	- 29,6
Potatoes	36,8	46,2	36,6	19,0	25,6	20,8	- 20,8	- 18,8
Miscellaneous	4,9	4,3	4,6	39,4	39,6	35,5	7,0	- 10,4
<i>Other products including:</i>				255,5	295,3	367,5		24,4
Soya meal	266,0	338,7	270,3	82,5	100,8	79,7	- 20,2	- 20,9
Raw tobacco	10,6	5,5	7,0	31,8	21,2	23,7	27,3	11,8
Food balance				-250,9	-586,5	-328,5		- 44,0
Import-export ratio (%)				72,9	48,7	63,3		14,6
Overall balance				-397,0	-743,4	-511,7		- 31,2
Import-export ratio (%)				66,4	48,3	59,4		11,1

(Source: Report 2004 T.C.B.)

References:

TECHNICAL INSTITUTIONS

- Agribusiness Technical Centre (ATC)
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- Technical Centre for Organic Agriculture (TCOA)
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Tel. 00216-73346278/73346279 Fax: 00216-73346277

INVESTMENT INSTITUTIONS

- Foreign Investment Promotion Agency (FIPA)
Avenue Slaheddine el-Ammami - Centre Urbain Nord – 1004 Tunis
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- Agricultural Investment Promotion Agency (AIPA)
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