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Report Name: Grain and Feed Annual

Country: Tunisia

Post: Tunis

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Report Highlights:

Abundant rainfall set Tunisia up for a strong 2026 harvest. The wheat and barley crops developed very well entering the most critical growing period in April. Post projects MY 2026/27 wheat and barley production at 1.2 MMT and 570,000 MT, respectively, with imports at 1.85 MMT and 370,000 MT. Wheat and barley forecasted imports represent roughly a 3% increase and a 7% decrease respectively to estimated imports in MY 2025/26.

Executive Summary:

MY 2026/27

- With highly favorable winter growing conditions, Post forecasts MY 2026/27 wheat production at 1.2 MMT and barley production at 570,000 MT. This is better than average but a roughly 9% and 13% decrease respectively compared to exceptionally good production recorded in MY 2025/26.
- Tunisia's MY 2026/27 seeded area for wheat slightly increased to 582,000 HA from 581,000 HA in MY 2025/26, of which 533,000 HA is durum wheat and 49,000 HA is common wheat. (Note-Tunisia's harvested area is less than the seeded area. See table 1 for harvested area).
- Barley seeded area decreased to 409,000 HA in MY 2026/27 from 412,000 HA in MY 2025/26.
- The irrigated area of wheat and barley increased from 80,000 HA to 87,000 HA in MY 2026/27.
- Tolerable soil moisture during planting followed by abundant 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 2026/27.
- Wheat yields remain dependent on April rainfall, which could improve yields by 10 to 20 percent if favorable.
- Tunisian wheat consumption in MY 2026/27 is forecast at 3 MMT, reflecting an average growth trend of roughly two percent. Barley consumption in MY 2026/27 is forecast at 925,000 MT, reflecting average growth.
- To cover demand while rebuilding stocks to historical average levels, Post forecasts Tunisia's wheat imports in MY 2026/27 at 1.85 MMT, while barley imports are forecast at 370,000 MT.

MY 2025/26

Post adjusts the MY 2025/26 balance sheet to reflect official harvested area and production for wheat considering slight consumption increase driven by normal population growth. Post increased the MY 2025/26 estimate for wheat and barley ending stocks to 812,000 MT and 280,000 MT, respectively, to reflect Tunisia' efforts to reach comfortable stocks levels after a well above average 2025 harvest.

MY 2024/25

No changes made to MY 2024/25 numbers.

Commodities:

Area

Wheat

Barley

According to the Ministry of Agriculture¹ and farmer associations, Tunisian seeded area for wheat slightly increased from 581,000 HA in MY 2025/26 to 582,000 HA in MY 2026/27. Seeded area includes 533,000 HA of durum wheat and 49,000 HA of common wheat. The seeded area for barley is 409,000 HA, down from 412,000 HA in MY 2025/26. Irrigated areas of wheat and barley increased from 80,000 HA to 87,000 HA. The maintaining of wheat planted area from year to year is due to good 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 (In thousand HA)

	MY 21/22	MY 22/23	MY 23/24	MY 24/25	MY 25/26	MY 26/27
Wheat, Seeded	607	579	620	566	581	582
- Durum	542	515	550	514	549	533
- Common	65	64	70	52	32	49
Barley, Seeded	510	430	332	395	412	409
Wheat and Barley, Seeded	1,117	1,009	952	961	993	991
Wheat, Harvested	522	510	329	536	551	516
- Durum	459	448	286	486	520	477
- Common	63	62	43	50	31	39
Barley, Harvested	279	300	108	225	290	274
Wheat and Barley, Harvested	801	810	437	761	841	790

Source: Tunisian Ministry of Agriculture; *FAS/Tunis forecast MY 26/27 harvested area

Production

Post forecasts MY 2025/26 wheat production at 1.2 MMT and barley production at 570,000 MT. Planting was started and completed by mid-December 2025 during relatively dry weather. This was offset by abundant levels of rainfall in January through February 2026 that even caused floods in certain regions of Tunisia. Wheat and barley benefited from this moisture and clement temperatures. USDA field visits in March 2026 confirmed 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 production could decrease by as much as 10 to 20 percent

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.

compared to an excellent crop in MY 2025/26, if the crops does not receive enough rainfall in April 2026. Wheat seeds were available at the requested level during the sowing period. (Planting normally runs from mid-October to mid-December).

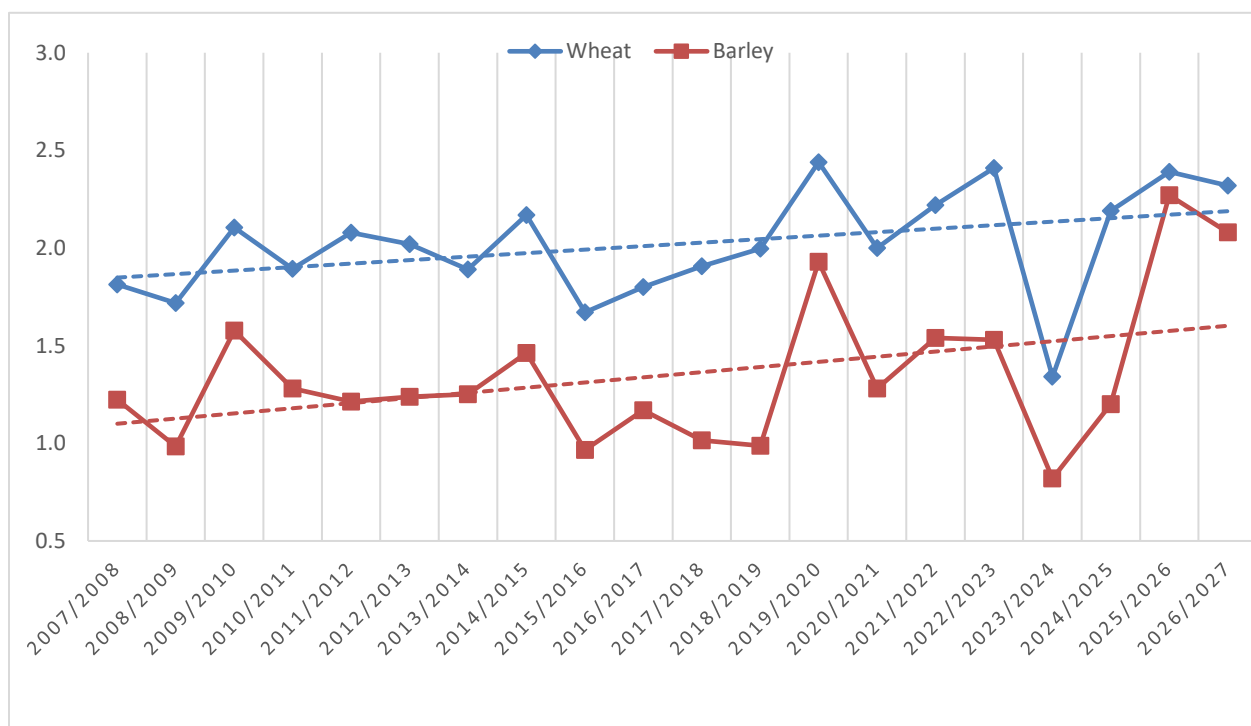
Based on industry and official Tunisian estimates, Post revised production a touch downward in MY 2025/26 to 1.318 MMT for wheat and upward to 660,000 MT for barley due to a higher-than-expected harvest.

Table 2: Wheat and Barley Production by Year

	MY 21/22	MY 22/23	MY 23/24	MY 24/25	MY 25/26	MY 26/27
Wheat	1,191	1,230	442	1,179	1,318	1,200
- Durum	1,071	1,030	428	1,066	1,240	1,098
- Common	120	200	14	113	78	102
Barley	430	460	90	272	660	570

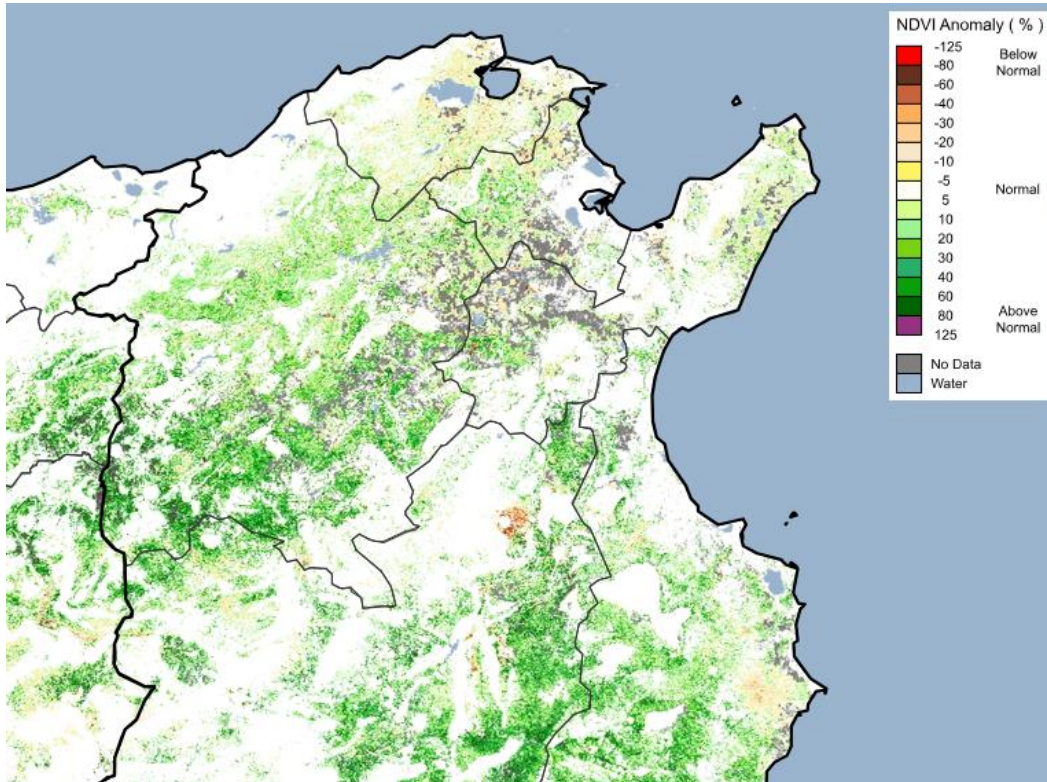
Source: Tunisian Ministry of Agriculture; *FAS/Tunis forecast (MY 26/27)

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



Source: Official USDA estimates; FAS/Tunis forecast (MY 26/27)

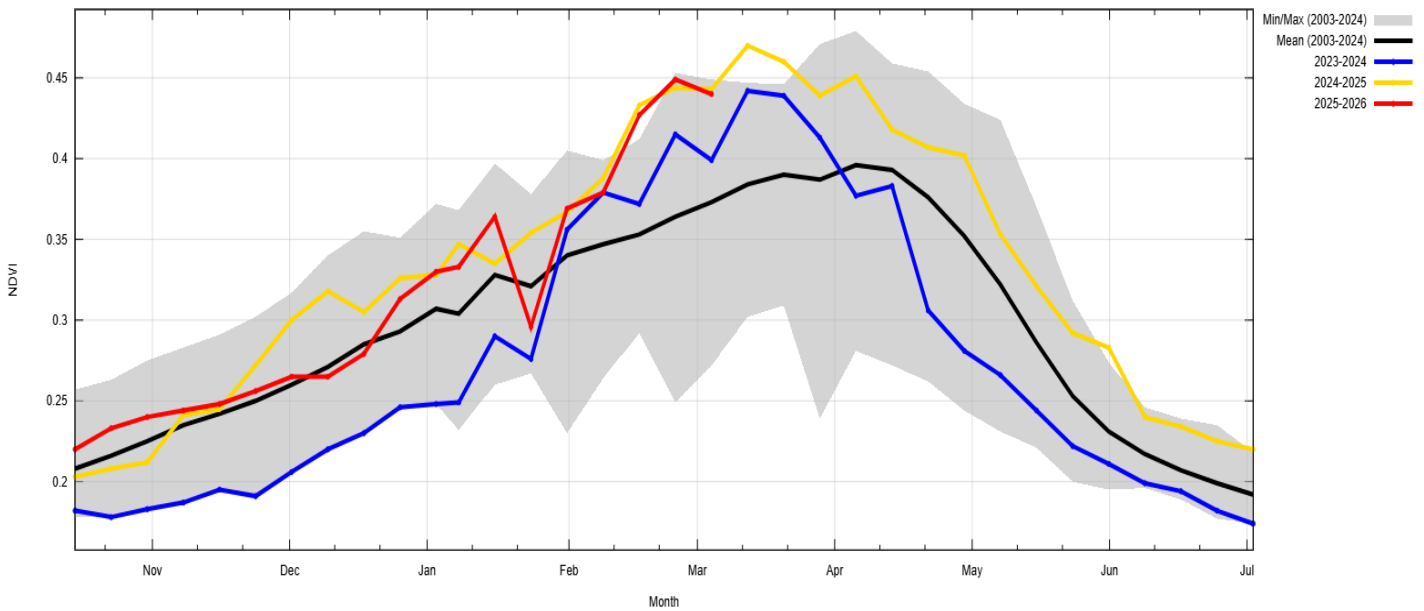
Image 1: Aqua MODIS NDVI Anomaly, 02/26/2026-03/05/2026 Range



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

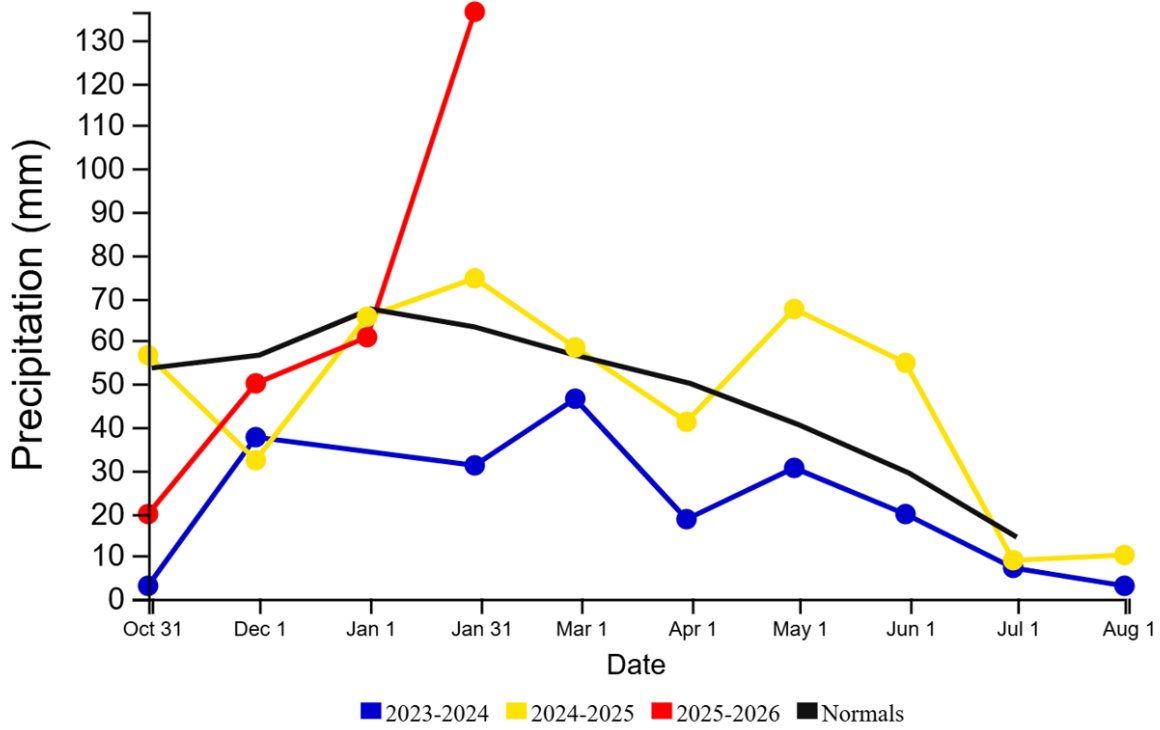
Source: NASA GIMMS Global Agricultural Monitoring

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



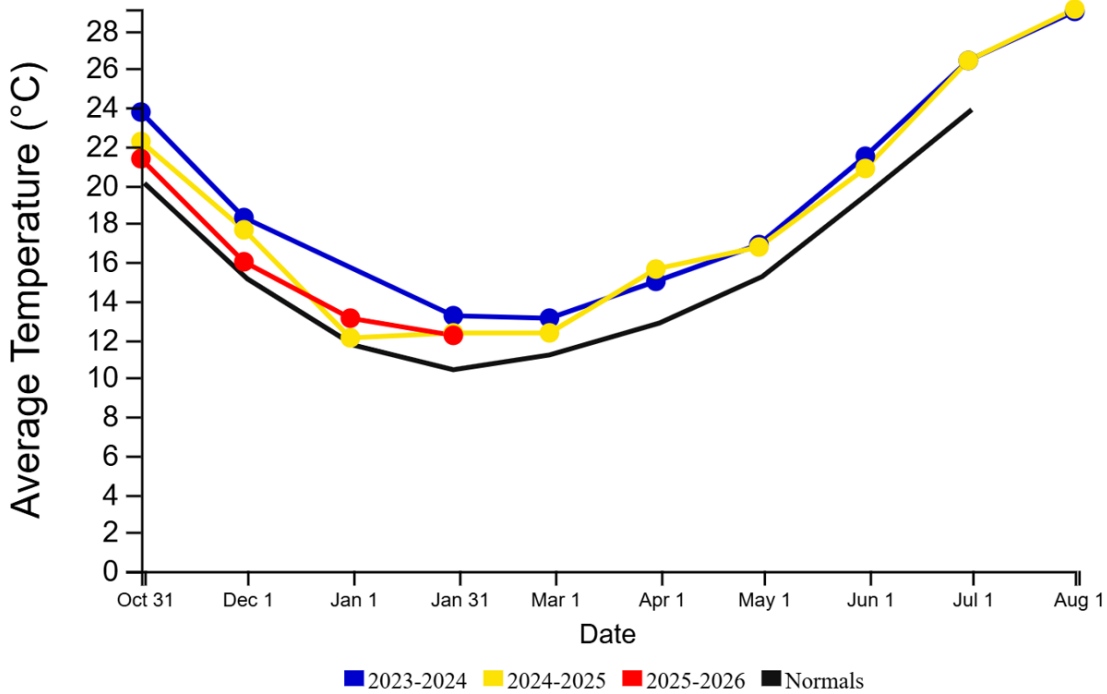
Source: NASA/GSFC/GIMMS, USDA/FAS/IPAD

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



Source: USDA/FAS/IPAD/GADAS

Figure 4: WMO Monthly Average Temperature, Times Series October-July



Source: USDA/FAS/IPAD/GADAS

Production Policy: Tunisia maintained MY 2025/26 farm-gate prices for domestic wheat and barley as follows:

- Durum Wheat: 1,300 TD/MT (\$438/MT),
- Common Wheat: 1,000 TD/MT (\$337/MT),
- Barley: 800 TD/MT (\$270/MT).

Other Tunisian domestic support policies remain unchanged from MY 2025/26. 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 yield.

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 2026/27 to slightly increase to 3 MMT reflecting the average population growth trend of approximately two percent. Per capita consumption is estimated at around 241 kg in MY 2026/27, with a population of 12.4 million. Total domestic consumption in MY 2025/26 is estimated to slightly increase as well to 2.95 MMT compared to MY 2024/25 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 2026/27 is forecast at 925,000 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 2025/26, which is estimated to lower demand on barley during the same marketing year.

Trade

Wheat

Post expects imports to be 1.85 MMT in MY 2026/27 based on consumption, traditional stock levels, and well above average production. It represents a 3 % increase compared to imports estimate in MY 2025/26 as Tunisia continues to rebuild stocks to traditional levels. In MY 2024/25 Post keeps import estimate at 1.8 MMT to reflect a lower final domestic production and Tunisia efforts to reach again historical stocks levels.

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 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 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 2026/27 barley imports are forecast to decrease to 370,000 MT due to an improved beginning stocks resulting from a well above average production in MY 2025/26.

Trade Policy: Unlike wheat, barley imports are liberalized and private sector companies are allowed to import directly 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	2024/2025		2025/2026		2026/2027	
	Jul 2024		Jul 2025		Jul 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	536	536	550	550	0	516
Beginning Stocks (1000 MT)	298	298	664	664	0	812
Production (1000 MT)	1179	1179	1350	1318	0	1200
MY Imports (1000 MT)	2110	2110	1800	1800	0	1850
TY Imports (1000 MT)	2110	2110	1800	1800	0	1850
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	3587	3587	3814	3782	0	3862
MY Exports (1000 MT)	23	23	20	20	0	20
TY Exports (1000 MT)	23	23	20	20	0	20
Feed and Residual (1000 MT)	100	100	100	102	0	105
FSI Consumption (1000 MT)	2800	2800	3000	2848	0	2895
Total Consumption (1000 MT)	2900	2900	3100	2950	0	3000
Ending Stocks (1000 MT)	664	664	694	812	0	842
Total Distribution (1000 MT)	3587	3587	3814	3782	0	3862
Yield (MT/HA)	2.1996	2.1996	2.4545	2.3964	0	2.3256

(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 2026/2027 = July 2026 - June 2027

OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query](#)

Table 5: Barley Production, Supply and Distribution

Barley Market Year Begins Tunisia	2024/2025		2025/2026		2026/2027	
	Jul 2024		Jul 2025		Jul 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	225	225	290	290	0	274
Beginning Stocks (1000 MT)	108	108	120	120	0	280
Production (1000 MT)	272	272	550	660	0	570
MY Imports (1000 MT)	620	620	550	400	0	370
TY Imports (1000 MT)	600	600	550	550	0	370
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	1000	1000	1220	1180	0	1220
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)	800	800	1000	817	0	840
FSI Consumption (1000 MT)	80	80	80	83	0	85
Total Consumption (1000 MT)	880	880	1080	900	0	925
Ending Stocks (1000 MT)	120	120	140	280	0	295
Total Distribution (1000 MT)	1000	1000	1220	1180	0	1220
Yield (MT/HA)	1.2089	1.2089	1.8966	2.2759	0	2.0803
(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 2026/2027 = October 2026 - September 2027						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Attachments:

No Attachments