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2012 Grain and Feed Update

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Grain and Feed

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Report Highlights:

Tunisia's cereal production for the 2011/2012 season is projected to exceed 2.5 million MT, about 8 percent larger than production in the previous year, and about 50 percent higher than average. Area planted with cereal crops this year is estimated at about 10 percent lower than the area planted last year, but the average yield is projected to be higher due to sufficient rainfall and favorable weather conditions during the cereal growing season. Agricultural analysts believe that the government's estimate for total grain production of 2.5 million MT is highly optimistic. It is reported that Tunisia has sufficient stocks to cover wheat market needs for two months. Tunisia will continue to rely on imports to satisfy at least 30 percent of its wheat consumption. In May, Tunisia purchased 75,000 MT of soft wheat.

Production

On May 14, the Tunisian Ministry of Agriculture issued its estimate of total grain (wheat and barley) production for the 2011/2012 campaign, indicating it could exceed 2.5 million MT. This production level would be about 8 percent higher than productions in the previous year, and about 50 percent higher than average production in the last 10 years. Area planted with cereal in the 2011/12 season was about 10 percent lower than the area planted last year, mostly because of the flooding of some fields and the loss of about 150,000 HA of seeded area. Despite the decline in the area planted this year, the average yield is projected to be higher than last year due to sufficient rainfall and favorable weather conditions throughout the various stages of the cereal crops. The Ministry of Agriculture's statement did not provide a breakdown of total cereal production projected this year. In 2010/11, cereal production totaled 2.3 million MT and consisted of 1.32 million MT of durum wheat, 280,000 MT of soft wheat, and 700,000 MT of barley.

Some analysts, however, believe that the Ministry of Agriculture's estimate of total grain production at 2.5 million MT is highly optimistic and does not take into consideration the impact of possible plant diseases that may impact a portion of the harvest, after recent heat waves and excess moisture conditions that occurred in Tunisia in mid May. Post maintains its initial estimate of total cereal production for the 2011/12 crop at 2.0 MT.

Trade

According to a Tunisian Ministry of Agriculture's statement, Tunisian grain stocks are currently estimated to cover the local market needs for two months, approximately 450,000 MT. The Ministry estimates that local production should cover about 70 percent of local needs and that imports will continue to provide for the balance. For MY 2011/12, Tunisia's wheat imports are expected to reach 1.6 million MT, slightly lower than the 1.7 million MT imported in MY 2010/11. In May 2012, Tunisia bought 75,000 metric tons of soft wheat. Post estimates that Tunisia's wheat imports for MY 2012/13 would be around 1.5 million MT, slightly smaller than imports in MY2011/12, due to the larger wheat crop expected this year.