



Tunisia is a small country in North Africa. Its economy is based on agriculture, manufacturing, tourism and services. It is mainly a whole soybean market for a crushing plant and several extrusion plants. The soybean market is quite important due to high poultry and egg consumption, in addition to a growing ruminant feed market. Gradually, Tunisian imports have moved from 100% Argentine Low Pro Soybean meal to 100% High Pro Soybean meal, mainly crushed locally. Small quantities of soybean meal are imported occasionally.

U.S. Soy has collaborated in Tunisia since the early 1990s.

COUNTRY STATS

POPULATION (2021):
11.8 million (Urbanization – 70%)

POPULATION (2050):
~13.4 (Urbanization ~ 75%)

GDP (2021):
\$ 37.00 USD Billion

AVG. ECONOMIC GROWTH
(2017-2021): **Negative 0.38%**

PER CAPITA INCOME (2021):
USD 4,240

MARKET STATS

Soy usage market size by Volume, 2021

Animal Protein (total)	80%	Aquaculture	0.002%
Poultry	51.7%	Oil	20.3%
Cattle & Sheep	47.9%	Any other soy usage	0.005%

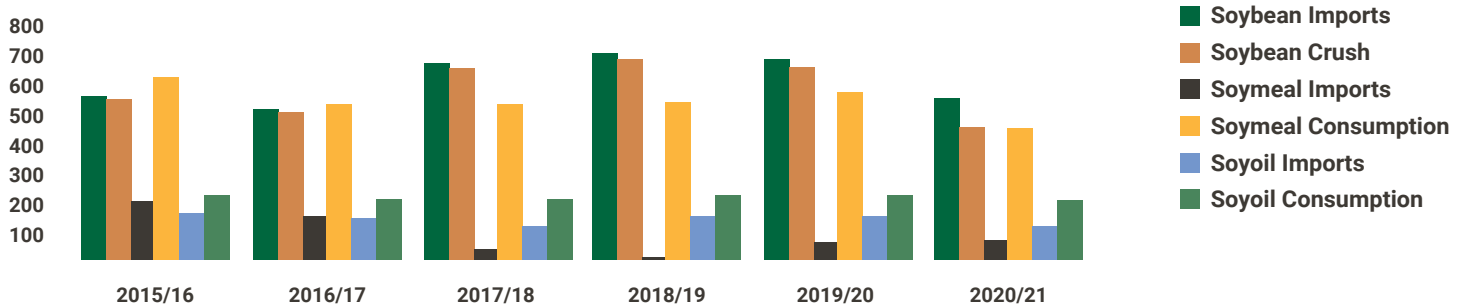
Soy market size by volume and U.S. Soy volume (MY2020/21)

- Soy complex (whole soybean, meal, oil): 0.719 MMT. U.S. Soy 0.250 MMT
- Whole bean: 0.542 MMT. U.S. Soy 0.240 MMT.
- Soybean meal: 0.062 MMT.
- Soybean oil: 0.11 MMT.



TUNISIAN SOY MARKET FEATURES

(x 1,000 MT)



STRENGTHS

- U.S. Soy is preferred by poultry integration groups and refiners.
- The Soy Excellence Center (SEC) is appreciated in the country.
- The youth in Tunisia have a high level of education in sustainability, appreciating sustainably sourced U.S. Soy.

OPPORTUNITIES

- Supporting veterinary-controlled poultry slaughtering will help maintain poultry consumption with growth forecast at 25% by 2035.
- There is an increasing awareness of carbon footprint for feed ingredients, especially by young people.
- Hypermarkets have started pushing for organic food, as well as healthy food and sustainable nutrition, including non-deforestation soy.
- Supporting Carthage Grain, the unique crushing plant, to quickly review the custom tax policy, as several assets are in favor of local crushing.

CHALLENGES

- COVID-19 is still causing an overall economic crisis, disturbing business in general.
- Current high prices of soybean meal and soybean oil will be an obstacle to any immediate action in the custom tax discussion.

Source(s):

- Oil World 2015 - 2020; Ministry of Agriculture and Local Companies for 2021 import figures.
- Oil World