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FOOD SECURITY SNAPSHOT

- Cereal production is expected to recover in 2011 due to improved rainfall
- Relatively stable domestic prices despite high international food prices



Cereal production forecast to recover following improved weather conditions

Early prospects for the 2011 winter wheat and coarse grain crops, to be harvested from around June, are favourable. Rainfall has been generally adequate to meet crops' water requirement since the beginning of the growing season, allowing satisfactory crop development in main producing zones. Moreover, prior to the current political crisis, the Government has increased its support to the agricultural sector mostly through distribution of improved seeds and debt rescheduling for farmers affected by last year drought and poor harvest.

Tunisia is a food-deficit country where agricultural production fluctuates markedly from year to year due to weather variations. Following a notable recovery in 2009, wheat output dropped by about 46 percent in 2010 compared to the previous year, and 35 percent compared to the five-year average. This was the lowest production level of the past eight years.

High international food prices did not translate into high inflation rate at national level

Tunisia relies heavily on wheat imports from the international market to cover its consumption needs. In spite of the good crop gathered in 2009, the country imported about 1.4 million tonnes of wheat, 47 percent of its domestic utilization, in the 2009/10 (July/June) marketing year. Import levels are anticipated to be much higher during 2010/11, due to last year's reduced crop. Consequently, the recent sharp rises in food prices have raised serious concerns over the food supply outlook in the country.

So far, however, the hike in international food prices has not translated into high domestic prices. The consumer price index of food declined slightly from 131 to 129.9 between November and December 2010. The year-on-year inflation rate in the food sector was estimated at 4.8 percent in December 2010. Nonetheless, the country's food import bill is expected to increase significantly.

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