Tunisia Grain - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 80 pages | Mordor Intelligence

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Report description:

Tunisia Grain Market Analysis

The Tunisia Grain Market size is estimated at USD 1.5 billion in 2025, and is anticipated to reach USD 1.81 billion by 2030, at a CAGR of 3.83% during the forecast period. The market expansion is driven by increased demand for food staples, feed grains, and vegetable oils, combined with policy reforms focusing on domestic production, import diversification, and storage capacity enhancement. Infrastructure improvements, including new coastal silos and port handling systems, reduced delivery time and post-harvest losses. The market has also benefited from a revised tender strategy emphasizing bilateral agreements, which has reduced procurement risks. Government interventions have protected against climate-related challenges, particularly in the cereals segment. According to the USDA Grain and Feed Annual Report 2025, the Cereal Board of Tunisia maintains exclusive control over wheat and wheat product imports and exports. The board directs all wheat tenders for domestic consumption, with the government subsidizing imported wheat prices and covering price differentials. Despite its impact on Tunisia's budget, the wheat subsidy program is anticipated to continue without changes or import reductions.

Tunisia Grain Market Trends and Insights

Investments in Infrastructure and Modernization

The Tunisian Cereals Office plans to expand grain storage capacity by 120,000 metric tons in 2025, distributed across Rades (40,000 metric tons), Sousse (58,000 metric tons), and Sfax (38,000 metric tons). The office will simultaneously renovate existing silos to maintain a stable grain supply. The new storage facilities require TND 205 million (USD 66.6 million), while silo renovations will cost TND 143 million (USD 44.5 million). The construction contracts specify modular steel designs for rapid assembly and reduced maintenance in port areas with high salinity. These infrastructure improvements enhance Tunisia's food security and increase the grain sector's resilience to climate and economic challenges.

Rising Barley Demand for Animal Feed and Beer Production

Barley serves as a secondary cereal crop in Tunisia, primarily supporting the livestock feed sector. While produced in lower volumes than wheat, it mainly serves as a feed grain for ruminants and livestock, with a small portion used in malt production for brewing. Tunisia's barley seeded area increased to 412,000 ha from 395,000 ha in Marketing Year 2024-2025, while the USDA report 2025 forecasts consumption in MY 2025-2026 at 940,000 metric tons, maintaining an average growth rate of approximately two percent. The grain is predominantly used in feedlots and as supplemental feed, particularly in areas with stressed rangelands. The brewing industry's demand has contributed to increased barley imports, with ITC Trade Map data showing import volume reaching 1.43 million metric tons in 2023, a 99% increase from the previous year's 0.71 million. Tunisia has implemented import liberalization following a successful trial period in the market year 2023-2024, reducing state budget expenditure and aligning with recommendations from international institutions and donors, marking a transition from the Office des Cereales (Cereal Board) monopoly to private sector participation in barley imports.

Prevalence of Drought Conditions

Tunisia's grain market faces significant constraints due to drought conditions that affect crop yields, water availability, and food security. The country has experienced three consecutive years of drought, causing reservoir levels to fall to 25% of capacity and requiring water rationing by authorities. Grain harvests have decreased by 60%, with domestic production falling to 250,000 metric tons. The combination of high input costs, crop failures, and limited irrigation has forced farmers to increase grain imports from Ukraine and Romania. Climate models project a long-term rainfall reduction of up to 15%, indicating a continued reliance on imports of approximately 30% even during favorable growing seasons. While the implementation of water-efficient drip irrigation systems and drought-tolerant seed multiplication programs is increasing, their adoption rate remains insufficient to address the current climate challenges.

Other drivers and restraints analyzed in the detailed report include:

Favoring Government Policies Supporting the Market / Adoption of Salt-tolerant Durum Wheat Cultivars / Unavailability of Proper Storage and Transportation Facilities /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

The Tunisia Grain Market Report is Segmented by Cereals, Pulses, and Oilseeds. The Report Includes Production Analysis (Volume), Consumption Analysis (Value and Volume), Export Analysis (Value and Volume), Import Analysis (Value and Volume), and Price Trend Analysis. The Market Forecasts are Provided in Terms of Value (USD) and Volume (Metric Tons).

List of Companies Covered in this Report:

Market Overview / Market Drivers / Market Restraints / Value / Supply-Chain Analysis / Regulatory Landscape / Technological Outlook / PESTLE Analysis / List of Stakeholders /

Additional Benefits:

The market estimate (ME) sheet in Excel format /
3 months of analyst support /

Table of Contents:

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