

BUSINESS OPPORTUNITIES IN THE MEDITERRANEAN

focus on **AGRI-FOOD**
in **TUNISIA**



Building EuroMed partnerships

This guide is a Doing business toolkit dedicated to clusters, SMEs, or entrepreneurs interested in developing business partnerships in the agri-food sector in Tunisia. It provides an overview of the main opportunities available for the private sector, as well as concrete and useful data to those interested to go further (contacts, calendar of events, etc.).

References

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EuroMed@Change proposes new dynamics for SME and cluster internationalisation between Europe and 4 targeted partner countries: Morocco, Tunisia, Egypt and Lebanon. It is managed by four organisations from across Europe (ANIMA Investment network as Project leader, the European Business Innovation Centre Network, INNO AG and the Fondation Sophia Antipolis as partners) and it coordinates with more than 45 associated regional business, finance and innovation networks.

Authors

This Business Guide has been prepared and drafted by Manal Tabet, with contributions from Zoé Luçon

(FDI section), Amina Ziane Cherif (maps), Jeanne Lapujade (proofreading), Lauriane Ammouche (layout), ANIMA.

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List of acronyms

- **ANIMA-MIPO:** Mediterranean Foreign Direct Investments and Partnerships Announcements Observatory implemented and managed by ANIMA
- **APIA:** Agency for Agricultural Investment Promotion
- **APII:** Industry and Innovation Promotion Agency
- **FAO:** Food and Agriculture Organization of the United Nations
- **Ha:** Hectare
- **FDI:** Foreign Direct Investments
- **n.a.** Non available
- **MED 10 countries:** Algeria, Egypt, Israel, Jordan, Lebanon, Libya, Morocco, Palestine, Tunisia, Turkey
- **EU:** European Union

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Mediterranean overview

Increased pressure which requires rapid developments

Agri-food is one of the most strategic sectors in the Mediterranean. The region is indeed facing a steady rise in food needs as a direct consequence of rapid population growth and recent changes in consumption patterns. Although Turkey has achieved relative self-sufficiency, the deficit continues to increase in the other countries of the region (respectively 55% and 85% of food consumption was imported in 2011 in Egypt and Lebanon for example), increasing their dependence on volatile international markets. The "Arab Spring" - which initially took the form of a social unrest caused by a dramatic raise in food prices - has highlighted the urgency of improving food security as well as the necessity to achieve a more integrated development of territories.

Stable investment trends

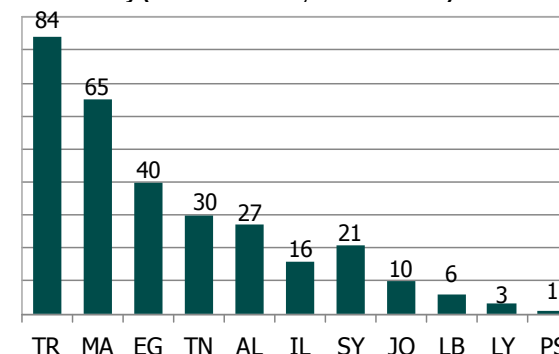
In light of the strong growth potential of Mediterranean markets, foreign direct investment (FDI) in agriculture and agro-industry has remained relatively stable to date. 2011 was however a record year, with major investments in Turkey (partial acquisition of local brewer EFES by Britain's SABMiller, takeover of local alcoholic beverage producer Mey İçki by TGP Capital) and large projects in Egypt (Nestlé) and Morocco (Lesieur).

The sector is characterised by a predominance of investments by multinational companies, mainly European. Attracted by the size of the markets but attached to their independence, the latter have so far favoured traditional projects, either via the establishment of local production facilities (dairy products or biscuits in Algeria, Egypt, Tunisia and Turkey for France's Danone, fruit and vegetables in Tunisia for Spain's SanLucar, vegetable oil or sugar in Algeria, Egypt, Morocco and Turkey for Saudi Arabia's Savola, etc.) or via the takeover or acquisition of a controlling stake in local businesses (Turkish confectionery brands Balaban and Dogan, and leading Israeli firms Osem, Materna and Tivall for Swiss Nestlé, Tunisia's producer of vegetable oil and margarine Gias Ingredient for German Dr. Oetker, etc.).

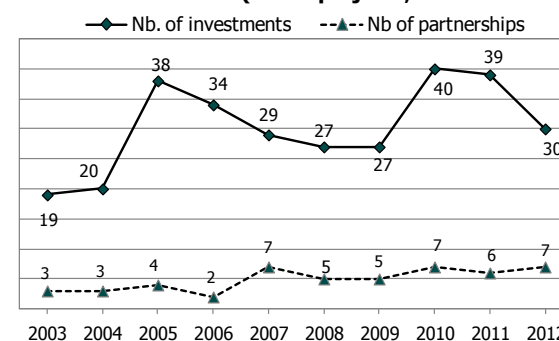
However, the sector attracts more SMEs every year (+30% between 2010 and 2011) interested in the opportunities presented by business partnerships (commercial and technological). Last but not least, the recent entry of investment funds into the market (TGP Capital, Investcorp, APAX Partners, Riverside, Global Emerging Markets, Actis, Capital Trust) highlights the strong potential for growth within the sector.



FDI project announcements in the agri-food sector per MED country (total 2003-2012, ANIMA-MIPO)



FDI and partnership announcements in agri-food in the MED 10 countries (no. of projects, ANIMA-MIPO)



Major assets and promising value chains to develop

The Southern rim of the Mediterranean is particularly strong in the agri-food sector, with for instance Lebanon, Morocco and Syria leading the way in terms of culinary excellence. The MED countries are gradually increasing the value added of their agri-food sectors by developing the processing and packaging industry for export development. The recent creation of agro-clusters (Morocco, Tunisia), including laboratories and R&D centres, support the modernisation of production facilities and the development of typical local products (prickly pear, camel milk, etc.). Finally, a number of niches with high growth potential remain largely untapped. This is notably the case of ingredients and processes that make up the Mediterranean diet (horticulture, vegetable oils, processed vegetables, dairy products, aromatic and medicinal plants, etc.), pre-cooked meals or organic farming.

SOME USEFUL LINKS

- Food Security in the Mediterranean: a major geostrategic issue (2010), IPAMED
<http://www.ipemed.coop/en/publications-r17/les-notes-ipemed-c48/food-security-in-the-mediterranean-a-major-geostrategic-issue-a183.html>
- Mediterra 2012: the Mediterranean diet for sustainable regional development (2012), CIHEAM - Presses de Sciences-Po
<http://www.ciheam.org/index.php/en/publications/mediterrra-2012>
- Mediterra 2010: Atlas of Mediterranean agriculture, food, fisheries and rural areas (2010), CIHEAM - Presses de Sciences-Po
<http://www.ciheam.org/index.php/en/publications/atlas-mediterra>
- CIHEAM's quarterly Watch Letters, devoted to major issues in Mediterranean food and agriculture
<http://www.ciheam.org/index.php/en/publications/watch-letters>
- CIHEAM's Briefing Notes
<http://www.ciheam.org/index.php/en/observatory/study-and-monitoring/81-notes-dalerte>

MORE USEFUL LINKS

- CIHEAM's Analytical Notes
<http://www.ciheam.org/index.php/en/observatory/study-and-monitoring/analytical-notes>
- OECD-FAO Agricultural Outlook
<http://www.oecd.org/site/oecd-faoagriculturaloutlook/>
- Mediterranean Investment Map: sectoral guidebook on public investment policies in the Mediterranean (2010), ANIMA Investment Network
http://www.animaweb.org/uploads/bases/document/Inv_MedInvestmentMap_ENG_Light_V2.pdf
- Med opportunities: 25 niche markets in need of investment (2009), ANIMA Investment Network
http://www.animaweb.org/uploads/bases/document/Inv_25NicheOpportunities_ENWithCover_light_02-2010.pdf
- Overview of the agri-food sector in the Euro-Mediterranean region (2005), ANIMA Investment Network
http://www.animaweb.org/uploads/bases/document/Agriculture_en.pdf



Market trends and opportunities

Building food security

The agri-food industry is of strategic importance for the development of the economic and social fabric of Tunisia. In fact, agriculture and the agri-food industry combined are the main contributors to national wealth, accounting alone for almost 15.7% of GDP. The sector employs nearly 18.5% of the country's population, and accounts for 9.7% of total export value. The agri-food sector has benefitted from strong political support since the 1990's, in the form of measures implemented within the framework of five-year plans for agricultural and industrial development, with primary goal to achieve security in the country. Market liberalisation in the late 1980s, modernisation programmes as well as aid funds for production, development and export have contributed to ongoing growth within the sector, turning out to be higher than that of the population. This has improved product availability, thus ensuring food independence in certain areas: the average coverage rate is currently 48% for cereals depending on the season and segments, with almost 100% for livestock products and 88% for oils.

The Tunisian agri-food sector also benefits from an attractive development framework, in particular for foreign companies setting up business in the country. First and foremost, the country occupies a strategic position as a gateway to Europe, enabling it to establish direct links with Africa and the Middle East. As a founder member of the WTO, Tunisia has also

worked hard to multiply free trade agreements with a number of countries, including the EU (association agreement and EFTA), Arab countries (via the GAFTA) and Turkey. This provides the country with further opportunities to commercialise its production. In addition, facilities have now been granted for a long while (free transfer of profits and sales proceeds, bilateral investment protection agreements, etc.) to encourage foreign investment and in particular in the agri-food industry (investment premiums, tax deductions, etc.).

This variety of incentives has led to increased investment and has encouraged businesses to locate in the country, which in turn leads to technology transfers and increased availability of skilled labour. Indeed, major agri-food brand names (Danone, Yoplait, Coca-Cola etc.) are now established in Tunisia, either in equity or in partnership with local businesses, producing for the domestic market or entirely for export. As a result, the country has succeeded in improving its balance of trade. Since 2000, it has recorded stronger growth in agri-food exports (they doubled between 2005 and 2008) than in imports.

Diversified agriculture

There are seven different bioclimates in Tunisia, with rainfalls varying between 50 mm per year on average in the south to more than 1,200 mm in the north. The country therefore offers suitable conditions for large



TUNISIA: AGRI-FOOD EXPORTS

(source: Ministry of Commerce 2012, APII 2010)

Export value	
Share in exports	9.7%
Export value	€ 813 m
Olive Oil	27%
Dates	17%
Seafood	12%
Vegetable oils and fats	12%
Cereals and derivatives	11%
Main destinations (volume)	
Italy	40%
Spain	21%
Libya	14%
France	9%

agricultural diversity, with each region developing its own specific produce: the north produces mainly cereals, vegetables and livestock; olive production is the main activity in the centre and south and date production is concentrated in the south west. The structure of production is dominated by livestock breeding, followed by arboriculture (olive, date and citrus trees), vegetable production and cereal crops.

In 2009, **livestock** represented 40% of the sector's value added (and therefore over 4% of the country's GDP), rising steadily since 1990 (4.1% average annual growth). This strong increase is due to the combined increase in poultry production and dairy production, which evenly divided represent over half the segment value. The livestock sector, which is heavily supported by the government (animal care costs funded by the state, national milk collection and production plants, etc.), is one of the country's main sources of pride: it almost satisfies total domestic demand and even exports to neighbouring countries.

Olive production represents a quarter the country's **arboriculture** (in 2012, Tunisia was the fifth largest olive oil producer in the world according to the FAO), followed by citrus fruit and date production. Date production is currently enjoying strong growth and offers a number of opportunities. Renowned for its Deglet Nour, the country is already the world's largest exporter of dates in terms of value, representing nearly 17% of its agricultural exports. It is also the leading supplier to the European market, where there

is growing demand for this product, driven by increased demand for halal products. Tunisian dates have moved upmarket in terms of preservation and packaging and this represents a particularly promising niche for export.

Medicinal and aromatic plants are also promising niche markets. The country already exports 250 tons of essential oils per year, mostly orange blossom, a very popular essence used by the perfume industry (34%), rosemary (31%) and citrus blossom. It also plays a pioneering role in the development of prickly pear based products, popular with pharmaceutical companies for their high vitamin E and essential fatty acid content. The beauty of the prickly pear is that it grows at a considerable speed and requires no particular care. However, there is room for improvement in the current 2 ton per hectare productivity rate of such crops, for it to come closer to Italian yield rates (20 tons per hectare). Finally, the development of spontaneous species (eucalyptus, Aleppo pine, etc.) and their products is still a niche market that remains to be fully explored.

Political upheavals of recent years have not prevented the Tunisian agricultural sector from increasing its production and attracting new investors. The Spanish company Sunlucar Fruits maintained development of its mega agricultural project in El Hamma, a 3,000 ha fruit and vegetable site designed to export produce to Germany and Austria. Similarly, the Dutch Company Gabrim announced in early 2013, a

TUNISIA: KEY AGRICULTURE FIGURES

Structure (Source: Ministry of Agriculture, 2005)

Agricultural land	10 million ha (62%)
Irrigated area	420,000 ha
Number of farms (2005)	516,000
Average farm size	10.2 ha
Farms smaller than 10 ha	75%

Role within the economy (Source: Ministry of Agriculture, 2012)

% of GDP (2012)	12%
% of employment	16%

Distribution (source INS & BCT 2009)

Per number of farms	
Olives	29%
Livestock	22%
Cereals	15%
Arboriculture (other non olive-related)	12%
Vegetable crops	7%
In production value	
Livestock	39.9%
Arboriculture	27.6%
Vegetable crops	16.6%
Cereals	13.3%
Others	2.6%



partnership to build a vast vegetable production unit in the Chenchou region, including a conditioning and packaging platform and the creation of some 1,000 jobs.

A move up market for the agri-food industry

The agri-food industry, which plays an essential role in the agricultural development of Tunisia, benefits from various other conditions that favour its expansion. First of all, it can rely on a good supply of local farming products at competitive prices. It is also helped by steadily increasing domestic demand (up 8% since 1995) and an increase in purchasing power, encouraging consumption of higher value added products, notably processed or packaged produce.

The national agri-food industry can also rely on strong political commitment in favour of its development. An extensive industrial modernisation programme aimed at achieving international quality and competitiveness standards was introduced in 1996 with the support of the European Union. Agri-food companies have greatly benefited from such measures that have enabled them to renew facilities, introduce new technologies, modernise processing techniques and improve the quality of their products. The programme granted financial aid to 451 agri-food projects, representing a total of €600m. Since 2005, great efforts have been undertaken as part of a national quality promotion programme to facilitate the adoption of international norms and standards within

Tunisian companies. In 2011, 1,930 companies were certified (compared to 5 in 1995) and many of them belong to the agri-food industry. Out of the sector's 1,091 companies with more than 10 employees, 122 can now claim to be ISO 9001, 22000, 14001, HAPPC, BRC or IFS certified.

An opening up to foreign investment and various export opportunities have also increased sector productivity. Approximately a hundred companies have set up business in the country through mixed funding and thirty or so in equity. In addition, about 164 businesses are entirely export oriented, specialising mainly in cold storage and seafood. In 2010, the sector was ranked first in terms of investment projects (foreign and local), accounting for 25.4% of total projects.

As a result, the sector experienced overall growth of 3.7% between 2007 and 2011. It offers significant opportunities for the creation of value added agricultural products; there still remains substantial margin for growth in many market segments. A host of opportunities are to be found in the **primary and secondary processing of products**.

For instance, the **milk industry**, flagship of the Tunisian food sector since the development of collection systems and the installation of fresh milk plants, still only transforms less than 50% of its production. Although there has been a breakthrough in powdered milk and yoghurt, cheese production is

TUNISIA: AGRI-FOOD INDUSTRY KEY FIGURES

Role within the economy (Source: Ministry of Industry, APII)

% of GDP	3.7%
% of employment	2.5% (est.)
Industry value added	19%
No of companies	6,500
No of companies (> 10 employees)	1,091
No of jobs (> 10 employees)	68,000
Production value	€4.6 billion



still limited, therefore offering great potential for development. A few large local groups have successfully invested in diversified milk production, for instance Poulina (pioneer in the poultry industry) continued its diversification in 2012 by extending its industrial ice cream production unit in Kairouan. Similarly, the Land'Or Group (leader in the local cheese industry), which after experiencing spectacular growth (up 24% between 2011 and 2012), is making plans for a stock market flotation since early 2013.

The **high value-added processing of fresh tomatoes** is also a promising niche. It is true to say that Tunisia is the world's biggest tomato consumer (approximately 50Kg per person per year, compared to 35Kg in the United States), and its tomato processing industry accounts for 90% of total fruit and vegetables processing in the country. However, the sector still only focuses on a single product: tomato paste. Local production of other tomato products (sauces, peeled tomatoes, tomato pulp, etc.) that are increasingly in demand due to increased purchasing power, is marginal. A move towards the upmarket segment and higher value added products therefore offer great potential.

Tunisia was also the world's **fifth largest olive oil producer** in 2012 (behind Spain, Italy, Greece and Syria). The country exports 70% of its production, mainly in bulk. The volume of packaged olive oil exported, despite strong growth due to dedicated

funding (+650% between 2006 and 2009), remains low, representing only 12% of export volume. The quality of Tunisian olives has enabled progress towards more upmarket production, with several international awards already granted to certain producers. Many new markets also remain to be conquered, including Japan, the United States or Canada, and efforts are being made in this direction.

Finally, the **cereal and fisheries industries** (the country's third agri-food exporters) offer fine opportunities: the consumption of basic commodities (pasta, couscous) is increasing, and the biscuit sector is on an upward trend. Upmarket fish products also offer plenty of possibilities (smoking, fish fillets, recovery of by-products for animal feed). Across the entire sector, the **packaging and conservation segments** are also promising. The country is attempting to consolidate its packaged olive oil and pre-cooked or semi-cooked meal sectors. The **cold storage capacity**, which plays an essential role in the regulation of agricultural production, falls short of requirements. Finally, the **halal niche** is growing fast due to increased demand from European and Asian markets. According to some estimates, this industry represents some €1,800 billion and is currently dominated by the Asian countries, Malaysia in particular. Tunisia could therefore effectively position itself as the main supplier to the European market. This is the aim of the INOPRI organisation, working in partnership with Malaysia on the issuing

STRATEGIC AREAS FOR DEVELOPMENT

- Packaged olive oil;
- Milk-derived products;
- Seafood products;
- Fruit and vegetable packaging;
- Canned products (tomatoes, harissa, etc.);
- Semi-preserved canned products;
- Dried tomatoes;
- Frozen products;
- Pre-cooked or semi-cooked dishes;

TUNISIA: AGRO-INDUSTRY COMPOSITION
(Industries with more than 10 employees, Source: APII, 2010)

Industry	* BTE	BNTE	Total	%
Oils and fats industry	23	277	300	26.9
Cereals and derivatives	10	222	232	20.8
Cold storage	82	106	188	16.9
Fruit and Vegetables	25	47	72	6.5
Fish	40	42	82	7.4
Beverages	4	58	62	5.6
Milk and derivatives	0	37	37	3.3
Sugar and derivatives	3	26	29	2.6
Meats	0	28	28	2.5
Others	22	62	84	7.5
Total	209	905	1114	

* Businesses totally exporting itsr output

* Businesses that do not totally export its output

of a certificate of conformity with halal standards.

The remarkable organic breakthrough

Organic farming and organic Tunisian products is not in its early beginnings. Despite its small size, the country is already ranked the **second country in Africa (after Uganda) and 24th in the world in terms of certified organic agricultural land area**. Since 2009, the country is also **the leading producer and exporter of organic olive oil in the world**. The segment has grown tremendously in the past 10 years. The area covered by organic farming has been multiplied by 50 and the volume produced by 42 between 2001 and 2009. The development of local organic farming has been driven by an exponential growth in international demand, backed by the government's strong will to make organic production a national priority. In 1999, a law on organic farming was enacted and support measures have been multiplied since. In 2010, a comprehensive national strategy was implemented aimed at extending land devoted to organic farming to 500,000 ha in 2014 (compared to 339,000 in 2012). The aim was also to diversify domestic production and achieve a 1% share of the local market, to guarantee quality, double exports and develop regional centres and research. Aid funds for investment, exports, cost control and certification were increased and the "Bio Tunisia" label created. In addition, many public and private bodies are structured to support the sector's development: this

is the case of the National Commission for Organic Agriculture, among others, which supports national strategy development, the Technical Centre for Organic Agriculture in Sousse which houses the Regional Horticulture and Organic Farming Research Centre, and various professional agricultural associations, all of which have departments dedicated to organic farming. Offices providing extension services for organic farming are also present in the various Regional Centres for Agricultural Development.

The segment features a number of advantages: the country's proximity to Europe and its ability to obtain early harvests mean that it has become a preferred supplier to the European market. The quality of local certification also enabled Tunisia to become accredited by the European Union in 2009 among the 8 countries in the world with similar legislation to its own: this formal recognition now allows free access for Tunisian organic products to the European market, exempting them from the obligation to provide an import authorisation and therefore delays of up to 2 months.

Although production is already on an upward trend, the sector still offers good development prospects. Export earnings still remain quite modest given the potential of the European and American markets, which are enjoying two-figure growth rates. In addition, a host of opportunities are possible with the diversification of production.



NOPAL TUNISIA: PIONEER IN THE DEVELOPMENT OF ORGANIC PRICKLY PEARS

After inheriting 200 ha of prickly pear crops, Rachdi Bennani decided to abandon his legal training to devote himself to developing his family's agricultural land, which at that time was exclusively producing fresh fruit. **Promoting the prickly pear and marketing organic prickly pear based ingredients quickly became his ambition**. It was an innovative approach to a product whose properties still remain largely unknown.

"At the time it was hard finding information about the prickly pear. I had to contact French and German experts to develop an extraction process. I even had to create a special machine as existing presses were not strong enough to process this type of seed", explains Rachdi, the founder of NOPAL TUNISIA. Developed thanks to cooperation with the German company IBG MONFORTS, Rachdi is now the exclusive North African distributor of the prickly pear oil presses that he helped launch.

Prickly pear oil is a rapidly expanding niche: Research recently highlighted its high vitamin E content, making it a sought after commodity by cosmetic and pharmaceutical companies.

Established in 2005, NOPAL is undoubtedly a pioneer in the field. **The company recorded annual growth of 30% thanks to an ongoing strategy of increasing value added production**, that has seen it progress from the raw material stage to a brand of cosmetics and soon, fresh juices. What will be the next step? "To offer our expertise to international brands wishing to collaborate with us to develop new finished products".

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Foreign Direct Investments

The increasingly attractive Tunisian agri-food sector

Given the country's agri-food potential, foreign investors based in Tunisia are still relatively inactive in the sector: the latter accounts for only 4% of the foreign direct investment (FDI) projects identified by the ANIMA-MIPO observatory between 2003 and 2012 in terms of announced project numbers, and 2% of the amounts invested. Nevertheless, the sector attracts an increasing number of FDI projects. In 2012, and for the first time, a very large investment, in excess of € 100m, was announced by the company SanLucar. This Spanish fruit and vegetable producer with activities in several European countries as well as in the MED region (Tunisia and Egypt), South Africa and South America, is located in Tunisia since 2008. By 2020, it plans to develop an additional 3,000 ha of land in various regions of the country to grow seasonal produce (berries, stone fruits and citrus fruits) for export.

European investors are leading the way

As with this mega project, a large majority (70%) of FDI projects announced in Tunisia in the agri-food sector are carried out by European investors. In addition to those investing in the **vegetable farming** industry, investors are active in the **dairy industry** (acquisition of 45% of Vitalait by the Spanish company Kaiku in 2012 ; investments

announced in 2011 by the French multinational Danone, second dairy producer in Tunisia, etc.), **olive oil** (FDI by the Italian SME Gasoli Giuseppe & C. in 2009 and the French company Lesieur in 2007), the **baked goods industry** (acquisition in 2012 of a 51% share of the olive oil and margarine producer Gias Ingredient by the German manufacturer of industrial pizzas and pastries Dr. Oetker). They are also investing in the **brewing sector** (the Dutch giant Heineken acquired 49.99% of beverage company SPDB in 2006 and then opened a second production plant in the Grombalia industrial zone, creating 250 jobs in 2011).

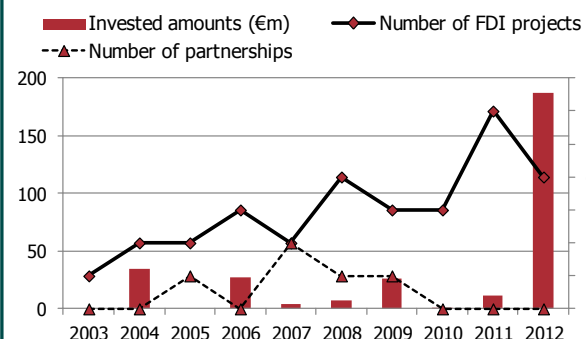
Other foreign investors are mainly from the Gulf countries (UAE, Saudi Arabia, Kuwait) and neighbouring countries (Morocco, Libya). Other MED investors have also expressed their willingness to set up business in the country soon. They include Cevital, the leading private Algerian group, which hopes to develop a sugar refinery project, and Baktat, the Turkish group specialising in the processing of agricultural products.

Niche markets to exploit

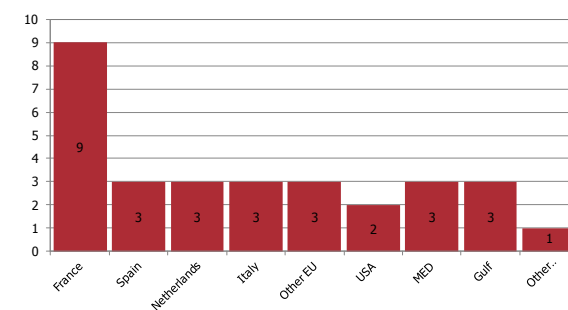
Foreign investors operating in the agri-food sector in Tunisia focus more on quite "traditional" sectors, yet many opportunities remain in higher value added segments such as processed products, organic farming, extra virgin olive oil or seafood.



Tunisia: Announced FDI projects and partnerships in the agri-food sector (ANIMAMIPO)



Tunisia: Main countries investing in the agri-food sector (number of FDI announcements, ANIMA-MIPO)

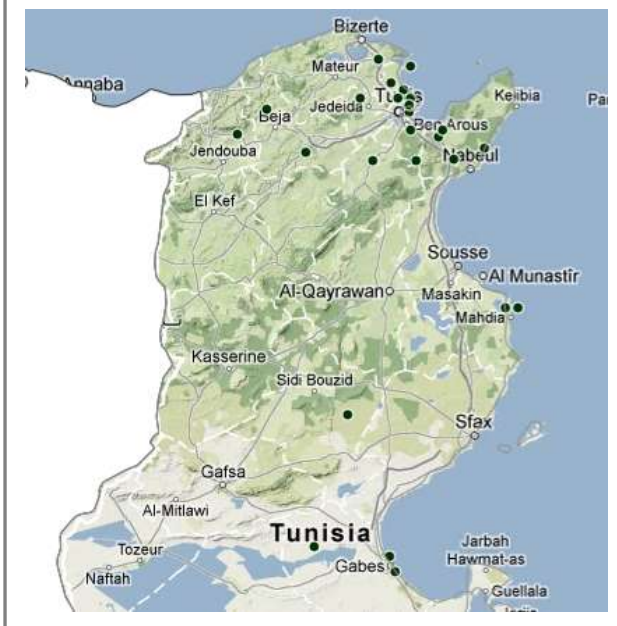


The 10 most important FDI announcements in the agri-food sector in Tunisia (2003-2012 ANIMA-MIPO)

Investor	Origin	Date	Type	Project	m€
SanLucar	Spain	2012	Greenfield	The fruit and vegetable producer to launch an export-oriented mega-project set to create 25,000 jobs by 2018	169
Crown	USA	2004	Greenfield	Construction of a beverage can plant	32,16
Heineken	Netherlands	2006	Financial JV, partial acquisition	Heineken invests Euro 27 million for 49.99% of SPDB and construction of a new brewery	27
Saudi Fund for Development	Saudi Arabia	2009	Financial JV, partial acquisition	The Saudi Fund for Development to invest in an integrated agricultural development project in Sidi Bouzid, the inland central region of Tunisia	26
Kaiku	Spain	2012	Financial JV, partial acquisition	The company to purchase 45% of the Vitalait Group, one of the leading Tunisian livestock and milk producers, based in Mahdia	12,8
SanLucar	Spain	2011	Brownfield	The fruit and vegetable producer to expand its tomatoes greenhouses located 450 km south of Tunis and heated with geothermal water	10
Actis	UK	2008	Financial JV, partial acquisition	The London-based private equity firm to take a minority stake in Tunisian conglomerate Poulina Group Holding	6,4
Salim Nouri Smida	Libya	2012	Financial JV, partial acquisition	The owner of a Tunisian-Libyan import-export business to buy 33% of Société Tunisie Sucre, which develops a manufacture in Bizerte	5
IFFCO	India	2007	Financial JV, partial acquisition	Indian conglomerate to acquire biscuit company L'Appetissante, counting on 700 employees in 2 industrial sites, for TND 6.2 mln	3,62
Castel	France	2004	Financial JV, partial acquisition	Concession contract for the production of Heineken beer in Tunis	2,5



Announced FDI and partnerships in the agri-food sector in Tunisia (2003-2013, ANIMA-MIPO)



Announced partnership projects in the agri-food sector in Tunisia (2003-2012, ANIMA-MIPO)

Investisseur	Origine	Date	Type	Projet
Mediterranean Fruit	Italy	2005	Representative office	Opening of an office in Tunis for the company in charge of Italian fruit and vegetable exports
Sodiaal	France	2007	Franchise, shop, etc.	The dairy company to expand its activities by forming a franchisee with local Doghri and Ben Jamaa groups
CTIA	Canada	2007	Development agreement	joint-venture Canadian- Tunisian company CTIA (50/50) to produce tomatoes derived
SanLucar	Spain	2008	Technological partnership	The fruit and vegetable producer to partner with local group 'La cinquième saison' to launch geothermally heated greenhouses of tomatoes in El Hamma
Kerry	Ireland	2009	Development agreement	The food corporation to start sourcing in Tunisia thanks to the opening by a local partner of a freezing factory in Souassi (Mahdia)



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Key players

Regulation

The Tunisian agri-food industry is coordinated by three ministries in charge of drafting laws, developing national strategies and ensuring that programmes are implemented. The **Ministry of Agriculture** applies government policy in the field of agriculture and fisheries, through its 11 technical departments (one of which is dedicated to organic farming) and 24 Regional Offices for Agricultural Development. The **Ministry of Industry** is responsible for the agri-food industries, implements national programmes for industrial modernisation and organises quality promotion campaigns. As for the **Ministry of Commerce**, it has a regulatory role for matters relating to consumers and foreign trade.

Management & Public procurement

A number of institutions operating under government supervision have been established to provide operational support for public policy. They include the **FIPA** (Foreign Investment Promotion Agency) and **APIA** (Agency for Agricultural Investment Promotion), both in charge of implementing investment incentive measures. **APII** (Agency for the Promotion of Industry and Innovation) supports national industrial development, promotes the creation of new businesses (guidance, network of small business centres, etc.) and manages industrial zones across the country. As for the Centre for the Promotion of Exports (**CEPEX**), it is responsible for assisting

companies with export projects (information, training and funding).

Federations and professional associations

There are many professional agri-food organisations in Tunisia, operating within the framework of various statutory laws.

The main professional agricultural organisations include **community interest associations (AIC)**, the majority of which deal with water management, **producer associations** and **agricultural service cooperatives (CSA)**. Their various roles include providing advice, the distribution of inputs or production collection (for example, they played a key role in organising the dairy industry).

At central level, the country has **three trade unions**: UTAP (Tunisian Union of Agriculture and Fishing), UTICA (Tunisian Union of Industry, Trade and Crafts) and since 2011, CONECT (Confederation of Tunisian Citizen Enterprises). In addition, there are three **Chambers of Agriculture** (North, Centre and South), under the supervision of the Ministry of Commerce. They play an advisory role in regional agricultural development and organise promotional activities, information and training sessions. Finally, there are seven **central cooperatives** altogether, which deal with the collection and production of a number of essential products (cereals, seeds, etc.).

The sectors have also been organised into **Interprofessional Agricultural Associations**,

bringing together various players in the targeted sector's value chain (Fruit, Vegetables, Poultry products, etc.), including producers, exporters and processors. There are 7 such groups and they play an essential role in regulating the market.

Research & Innovation

In addition to the national research institutes (INRAT, IRESA), the Tunisian government provides the agri-food research sector with six **Technical Centres** that have laboratories and provide professional research, innovation, training and business watch services. These Technical centres specialise in cereals, potatoes, agri-food, organic farming, aquaculture and packaging. In addition, small agricultural business centres located in training or research centres (INRAT, ESIAT), assist young entrepreneurs in their projects. Finally, since 2006, the Bizerte cluster also welcomes businesses and start-ups (in its business incubator), and works to ensure a better transfer of technology between laboratories and professionals.

Government & Governmental bodies		
Ministry of Agriculture and Water Resources	The Ministry of Agriculture is responsible for developing plans and strategies for the promotion of agriculture, as well as scheduling different development programmes and ensuring that they are implemented.	www.tunisie.gov.tn
Ministry of Industry	The Ministry of Industry designs and implements government policy in areas relating to industry. In particular, it is in charge of the national programme to modernise industry.	www.industrie.gov.tn
Ministry of Trade and Crafts	The Ministry of Commerce develops and implements government policy in areas relating among others, to trade, consumer protection, competition, pricing, export and import, economic and business cooperation and e-commerce.	www.commerce.gov.tn
Foreign Investment Promotion Agency (FIPA)	FIPA's role is to provide any necessary support to foreign investors and promote foreign investment in Tunisia. It has offices abroad and a network providing information, contacts, advice, assistance, guidance and support to foreign investors.	www.investintunisia.tn
The Agency for Agricultural Investment Promotion (APIA)	APIA is a public institution dedicated to the promotion of private investment in agriculture, fisheries and related services as well as primary processing activities.	www.apia.com.tn
Agency for the Promotion of Industry and Innovation (APII)	APII is a public institution that implements government policy for the promotion of the industrial sector and support to businesses. It is authorised to deal with all administrative and legal procedures involved in business registration, operates a network of business incubators and among other things, drafts technical audits for industrial modernisation projects.	www.tunisieindustrie.nat.tn
Centre for Export Promotion (CEPEX)	CEPEX offers support to exporting companies, providing them with information or guidance (training, funding, assistance). It also organises campaigns to promote Tunisian products abroad (participation in trade fairs, etc.).	www.cepex.nat.tn
National Institute for Standardisation and Industrial Property (INNORPI)	INNORPI is the public institution in charge of standardisation, quality and protection of industrial property. As such, it sets standards, certifies product conformity, issues patents and registers trademarks.	www.innorpi.tn
National Observatory of Agriculture (ONAGRI)	ONAGRI is responsible for an information system designed to analyse the situation of the agriculture and fisheries sectors at national and international levels. It collects information and data for use by various stakeholders.	www.onagri.tn
Main Business Federations & Associations		
Chambers of Agriculture	Three chambers group together farmers in the 10 northern governorates, 6 in the Centre and 7 in the South. These chambers work under the supervision of the Ministry of Agriculture. They have an advisory role to the government and are responsible for the promotion of agriculture and the training of member farmers.	
Union of Agriculture and Fisheries (UTAP)	UTAP is the main national professional trade union. Its mission is to represent farmers and their interests.	www.utap.org.tn
Tunisian Union of Industry, Trade and Crafts (UTICA)	UTICA is one of two Tunisian employers' organisations. It is organised into regional unions, represented in each governorate, and national and sector based federations.	www.utica.org.tn
Confederation of Tunisian Citizen Enterprises (CONECT)	CONECT is the new employers' organisation, founded in 2011. It includes a professional association specialising in agri-food.	www.conect.org.tn

Central cooperatives	The central cooperatives function as parastatal organisations and specialise in the collection and distribution of certain products. The 7 central cooperatives deal in the oils, seeds, cereals, wheat, wine-growing and field crops sectors.	
Interprofessional Agricultural Associations	7 interprofessional agricultural associations provide the possibility to network between players in the local value chain. There is an interprofessional group in the fruit sector (GIF), in the vegetable sector (GIL), for Poultry and Rabbit Products (GIPAC), for Milk (GILait), Red Meat (GIVR), Fishery Products (GIPP) as well as a Group of Wine Growers and Fruit Producers (GOVPF). These structures are there to provide specific information about the sectors concerned, including their organisation, current legislation or special programmes.	www.gifruit.nat.tn; www.gipaweb.com.tn; www.givlait.com.tn; www.gipp.tn
Innovation players (incubators, research centres etc.)		
Institution of Agricultural Research and Higher Education (IRESA)	IRESA is the national agricultural research institute, under the supervision of the Ministry of Agriculture. It is made up of 13 research institutes (the National Institute of Agronomic Research of Tunisia, the Olive Tree Institute, the National Institute of Sciences and Marine Technologies etc.) and 39 laboratories working in various areas of agronomy in Tunisia.	www.iresa.agrinet.tn
Bizerte Cluster	The Bizerte Cluster is an integrated space split into three components: an agri-food technology park, industrial areas and a network of Agro'tech partners.	www.pole-competitivite-bizerte.com.tn
Technical Centre for Cereals	The CTC organises promotional activities and research in the cereal sector.	
Technical Centre for Potatoes	The CTC organises promotional activities and research in the potato-growing sector.	www.ctpt.com.tn
Agri-Food Technical Centre	The CTA is a technical organisation for professionals in the food industry. It provides assistance to various branches of this particular sector, notably in the fields of industrial performance, innovation, food safety, nutrition and sustainable development.	www.ctaa.com.tn
Technical Centre for Organic Farming	The CTAB's mission is to promote and develop organic farming in Tunisia by organising activities in areas such as training, applied research, promotion and information exchange.	www.ctab.nat.tn
Technical Centre for Aquaculture	CTA represents seafood professionals working in various development, experimentation and new technology activities (commercialising scientific research in the field, diffusion of aquaculture technology, the diversification of species and farming systems etc.). It also provides technical assistance (studies, training, etc.).	www.ctaquaculture.tn
Packaging Technical Centre (PACKTEC)	Established in 1996, PACKTEC offers support to packaging professionals (manufacturers, packers and exporters). It has a design department, laboratories for testing materials and food packaging, as well as a logistics centre. It also provides audit services for modernisation projects, training and the implementation of quality management systems.	www.packtec.tn

Useful directories (private companies)		
Agri-food companies	The Agri-Food Technical Centre directory lists some 1,136 companies registered in the agri-food sector.	http://www.ctaa.com.tn/ann.php
Agri-food companies	Europage, the European business network, has a list of 1,057 agri-food businesses in Tunisia.	agro-alimentaires.europages.fr/annuaire-entreprises/did-02/cc-TUN/Tunisie/Industries-agroalimentaires.html
Agri-food companies	The Bizerte Technology Park lists 102 agri-food companies operating in various fields (packaged olive oil, cooked meals, canned fish, milk derivatives, etc.).	www.pole-competitivite-bizerte.com.tn/annuaire.php?code_menu=25
Fish farms and service providers	The Technical Centre for Aquaculture provides a list of farms and suppliers of goods and services in the field of aquaculture.	www.ctaquaculture.tn
Organic Farming	The Technical Centre for Organic Farming provides a directory listing all Tunisian organic operators according to product type and governorate.	www.ctab.nat.tn/default.php?p=annuaire
Olive Oil	The Tunisian Olive Oil Board provides a list of olive oil exporters.	www.onh.com.tn/index.php/fr/exportateur
Packaging	The Packtec Centre provides a directory of packaging professionals.	www.packtec.tn/annuaire.php
Certification	The Technical Centre for Organic Farming provides a list of control and certification bodies in Tunisia.	www.ctab.nat.tn/occ_fr.pdf

Recent National Policies

A more upmarket approach is a national priority

The Tunisian government implements its policy within the framework of five-year development plans. Successive plans for the agricultural sector have focused on structural reforms (Seventh Plan, 1987-1991), followed by increased productivity (Eighth plan, 1992-1996), improved access to international markets (Ninth plan, 1997-2001), private investment (Tenth plan, 2002-2005) and improving the sector's competitiveness (Eleventh plan, 2007-2011). Improving value added production, with the implementation of sector strategies and measures to enhance innovation and quality, is on the agenda for the current plan. The social dimension, through a better distribution of growth's benefits, as well as the environmental dimension, through more sustainable resource management, are also new topics to be reflected upon. The government is also making efforts to strengthen ties with neighbouring markets (Europe, Libya, Algeria) while seeking to diversify its partnerships (Japan, United States, Canada). The country participates in agri-food fairs in these countries, and is studying how to improve the legal framework for trade with the United States.

Between political liberalism and regulation

In 1986, the agri-food market benefited from a structural adjustment plan, which led to a liberalisation of prices, reduced taxation, a

privatisation of public enterprises, investment incentives and protection of private property. However, this deregulation was not fully applied to all market segments; some are still tightly controlled by the State. This is the case for segments such as cereals (the Grain Board has a near monopoly over collection and distribution), sugar (imports are handled by the Board of Trade) and edible oils (imported and exported through the Tunisian Board of Olive Oil). The State also controls prices of certain commodities such as milk or cereals.

In addition, the government supports the agri-food sector by subsidising investment, agricultural inputs (pesticides, fertilisers) and access to water, which is sold below operating cost prices. It also finances half the amounts invested in the agricultural sector, 60% of which are invested in hydraulic works.

Support funds for the agri-food industry

Tunisian farmers have their own public bank dedicated to their sector, the **Banque Nationale Agricole** (BNA), which provides access to specific credits (for seasonal crops and investment etc.) as well as closely monitoring the various issues that they face.

In addition, a number of funds have been set up to guide the sector's companies through the various stages of their development.

Firstly, the **FOSDAP** (Special Fund for the Development of Agriculture and Fisheries) provides



support for the agricultural investment strategies deployed by the government via the APIA organisation. deployed by the government via the APIA organisation.

To help industry, the **FODEC** (Development Fund for Industrial Competitiveness) was created in 1994 with the introduction of a specific business tax. It supports the various industrial modernisation and quality promotion programmes set up by the government and which have heavily involved agri-food businesses.

As for the **FOPRODEX** and **FAMEX**, their role is to provide support to exporting companies. The former finances activities to promote exporting companies via grants or loans at preferential rates, covering up to 50% of the amounts invested. The fund co-finances the creation of promotional materials, prospecting missions and representative branches abroad, etc. The FAMEX, which is now entering its third phase, provides technical assistance and funding to companies wishing to export for the first time. Since 2012, priority is given to inland regions that are the least favoured.

Finally, since 2006, the most recent organisation the **FOPROHOC** (Fund for the Promotion of Packaged Olive Oil), provides financial and strategic means to companies in the olive oil sector (distribution structures, creation of commercial labels,

participation in trade fairs, etc.) to help them through the export process.

Enhanced incentives for agricultural investment

Since 1993, the investment incentive code offers a number of incentives for investment in general, including total tax exemption on reinvested profits and income, suspension of VAT on imported capital goods, state participation in various types of infrastructure spending and investment premiums adapted to different sectors and regions.

Considered as priority sectors, agriculture and fisheries have their own special agency (APIA, Agency for Agricultural Investment Promotion) which applies increased tax and financial incentives. The system provides for the reimbursement of transfer tax on agricultural property, tax deductions on investment income over a 10-year period and customs duty and VAT exemptions on equipment that is unavailable within the country. In addition, several investment premiums ranging from 7% to 50% of amounts invested can be obtained in such activities as research studies, R & D, installation of water-saving irrigation equipment or the installation of anti-hail netting.

As part of this, organic farming benefits from even better support measures: a premium of 30% is granted for investments in equipment, instruments and means; customs duties are entirely suspended

INVESTMENT: SPECIAL INCENTIVES FOR THE AGRICULTURAL SECTOR

- Tax relief (tax deductions) ;
- Exemption from customs duties and the suspension of VAT on equipment that has no locally manufactured equivalent ;
- Deduction of investment income from the corporate tax base over a 10 year period ;
- Reimbursement of transfer tax on agricultural property investments ;
- Total or partial payment of individual training expenses for investment in technology ;
- 5 year exemption from social security contributions on salaries paid to newly recruited Tunisian employees ;
- Preferential rates on land loans to young farmers and farm technicians ;
- Premiums of 50% granted for investment in certain research activities ;
- Premiums for investment and acquisition of agricultural equipment ranging from 7 to 25% ;
- Special premiums for certain types of farming investments ranging from 25 to 70% (water prospecting, water saving, organic farming, difficult climate regions, bluefish fishing etc.).
- Additional incentives for companies that export their entire production: suspension of certain taxes, free importing of goods required for production, possibility to freely recruit four managerial and supervisory members of staff of foreign nationality etc.

For more information: www.apia.com.tn

for certain organic inputs, exporting costs are subsidised by 50% while 70% of the costs of inspection and certification are borne by the state, with the maximum amount increased from €2,500 to €5,000 per year in 2010.

An attractive framework for research and innovation

The Tunisian government has also developed a strategy to improve training, research and innovation in the agri-food sector, and to encourage value creation and the development of SMEs.

The Bizerte agri-food technology park is the leading agro-industrial park in the southern Mediterranean and is one of seven technology parks launched in Tunisia within the framework of the 11th Five year plan. Opened in 2006 and fully operational since 2010, it groups together within a single area, industrial facilities (45 ha of which are specifically dedicated to food processing) and training and research centres. It also provides agri-food companies with specially adapted services such as incubator facilities, a business intelligence unit, customised training and technology transfer guidance. The technology park coordinates collaborative projects such as Lactimed (project for the promotion of the Tunisian dairy industry) or OPTIMA (project for the creation of international industrial partnerships).

The Tunisian agri-food sector can also rely on some 60 laboratories and 270 research units working in the

fields of life sciences and biotechnology. Among these, the technical centres (CTAA, CTAB, PACTECK, etc.) have dedicated laboratories and provide businesses with research related services, technical assistance and training.

Finally, each year several training centres provide Tunisia with around 500 specialist engineers and an additional 800 qualified technicians in agri-food related sectors.

"The International market is the key to our growth strategy, the role of the Bizerte Cluster is to build bridges for export and technology transfer"

Sabri STA, Bizerte Technology Park

AN INTERNATIONALLY ORIENTED TECHNOLOGY PARK

The Bizerte Cluster, established in 2006, is part of the Tunisian national strategy for the promotion of innovation in the agri-food sector. In addition to accommodating businesses, the technology park is also linked to a university campus of 11,000 students and houses research and training centres. It provides business intelligence services, organises collaborative projects and **strives to create operational relationships between research and companies in the sector**. Its incubator, launched in early 2013, is already home to two start-ups, which have developed specific techniques in the field of essential oils and olive oil.

The cluster works closely with a national network of approximately 23 organisations that support innovation and SMEs as well as **with 8 international partners**, including the European Innovation Cluster for Fruits and Vegetables (France), the Centuria-Rit Technology Park (Italy) and the WagrALIM agro-industry cluster in Wallonia (Belgium). **"We have developed an MBA programme in partnership with the Mediterranean Agronomic Institute of Montpellier**, which enables us to offer students a double degree. We are also working with Sup'Agro on continuing education and training courses that reflect the specific needs of our business", explains Sabri Sta, head of the cluster's business intelligence unit.

The technology park also organises theme days with international experts and is working on publishing a complete online portal providing information about the Tunisian agri-food industry with the support of GiZ and the PASRI project.

focus on **AGRI-FOOD**

in **TUNISIA**

Selected on-going programmes & initiatives

Modernisation

Modernisation Programmes

Period: underway

Budget: n/a

Funding: Various

Opportunities: Funding, technical support

Lead Executing Agency: Tunisian Ministry of Industry

Objectives: Since 1995, the modernisation programme encourages the upgrading of Tunisian businesses. In particular, it provides support for investment in equipment, new technologies and research through specific lines of credit, investment facilitation and technical assistance projects.

Information : www.pmn.nat.tn

Programme to support business competitiveness and facilitate access to markets (PCAM)

Period: 2011-2015

Budget: €23m

Funding: European Union

Opportunities: Market opportunities, assistance, funding

Lead Executing Agency: Tunisian Ministry of Industry

Objectives: The PCAM programme helps improve business competitiveness and access to international markets by supporting the implementation of quality control systems and CE labelling via the provision of technical assistance and grants.

Information : www.pcam.qov.tn

Agricultural development

Integrated agricultural development project in the Governorate of Siliana (Phase II)

Period: 2005-2013

Budget: €43m

Funding: IFAD, AFD, Tunisian Government

Opportunities: Funding, assistance

Lead Executing Agency: Tunisian Government

Objectives: Project to improve access to loans and encourage investment in irrigation, development of rural tracks and access to drinking water in the Siliana region. Part of the project includes a training programme for sustainable land management.

Information : www.ifad.org



Activity development	LACTIMED Period: 2012-2014 Budget: €4.8m Funding: European Union / Others Opportunities: Technical support, training, business networking Lead Executing Agency: ANIMA Objectives: The promotion of production and distribution of typical and innovative dairy products in the Mediterranean by structuring the local value chains, by offering producers support with their development projects and by opening new markets for their products. Information : www.lactimed.eu	Project to provide access to the food commodity and regional produce marketplace (PAMPAT Programme) Period: underway (launched in 2012) Budget: €5m Funding: Swiss cooperation Opportunities: Training, technical support Lead Executing Agency: UNIDO Objectives: Provision of support across the entire value chain for a number of typical Tunisian products (harissa, Djebba fig, organic products) and the strengthening of sectors with high export potential. Information: n/a
Activity development	SERVAGRI & AGRO-MED QUALITY Period: 2011-2013 Budget: €0.8m each Funding: European Union / Italy Opportunities: Technical support, business networking Lead Executing Agency: Gruppo di Azione Locale ELORO; Provincia di Caltanissetta Objectives: The development of strategies and pilot activities between Tunisia and Italy to improve integration of agri-food activities, make typical products more competitive and improve quality levels and food safety. Information : servagri.eu www.agromedquality.eu	OPTIMA Period: 2011-2013 Budget: n/a Funding: French cooperation Opportunities: Business networking Lead Executing Agency: UNIDO / Bizerte Technology Park Objectives: This programme aims to provide support for the development of the agri-food sector in Tunisia by setting up industrial and technological partnerships with French companies. Information: n/a

Major business events

General	SIAT- International Exhibition for Agricultural Investment and Technology Sector: Agriculture & Agri-food Industry Number of editions: 10 (Biennial) Organiser: APIA, International Tunisian Fairs Company Focus: Presentation of the latest innovations and investment opportunities in the agri-food and fisheries sectors. 2010 Participation*: 185 exhibitors et delegations from 15 foreign countries. Next event: n/a	SIAMAP - International Agricultural Show Sector: Agriculture & Agri-Food Industry Number of editions: 11 (Biennial) Organisers: Tunisian Union of Agriculture and Fisheries (UTAP) Focus: Exhibition and meetings involving professionals in machinery and farm equipment, livestock production and fisheries. 2009 Figures*: 300 exhibitors from Tunisia and 17 other countries; 50,000 visitors. Next event: 27 November - 1 December 2013, Tunis (Kram)
General	BIOEXPO Sector: Agriculture & Agri-Food Industry Number of editions: 4 (since 2010) Organiser: International Fairs & Exhibitions Focus: To present the latest innovations in the sector to organic farming professionals, industrials and service providers. 2012 Participation *: n/a Next event: 9-11 May 2013, Tunis (Soukra Expo) Information : www.soukra-expo.com/bio-expo/	MED INDUSTRIE Sector: Industry Number of editions: 3 Organisers: CCI Tunis Focus: To promote industrial partnerships and innovation in various sectors including agri-food industries. 2013 Participation *: 4,000 exhibitors expected, 200 of them from abroad Next event: 12-15 June 2013, Tunis (Kram) Information : www.tunis-medindustrie.com
Agriculture	PAMED - Mediterranean Exhibition for Animal Production and Agricultural Products for Export Sector: Agriculture Number of editions: 10 Organiser: Médina Méditerranée Focus: Exhibition and trade meetings between stakeholders in the farming sector. 2012 Participation *: 51 exhibitors (with 24 international exhibitors from 19 countries) Next event: 4-6 June 2013, Hammamet	MED MAG OLIVIA Sector: Olive growing Number of editions: 2 (2012, 2013) Organiser: MedMag Events Focus: Exhibition bringing together professionals in the olive sector, olive oil and its derivatives. Workshops on specific topics and business meetings are organised. 2012 Participation *: Approximately 60 exhibitors are expected in 2013. Next event: 9 -12 June 2013, Sousse Information : www.medmagoliva.net

* Figures supplied by the organisers

Tunisia Food Expo

Sector: Agri-Food Industries

Number of editions: 1st edition

Organiser: International Tunisian Fairs Company

Focus: International event designed to be the main "Euro-Mediterranean Agri-Food Rendez-Vous"

2012 Participation *: n/a

Next event: 13-16 November 2013, Tunis

Information : www.tunisiafoodexpo.com.tn

SIIAS - International Agri-Food and Services Exhibition

Sector: Agri-Food

Number of editions: 3 (2010, 2011, 2012)

Organiser: GECO

Focus: Trade exhibition involving stakeholders in the agri-food industry.

2012 Participation *: 51 exhibitors (with 24 international exhibitors from 19 countries)

Next event: n/a

Information: n/a

Pack Print Tunisia

Sector: Packaging

Number of editions: 4 (biennial)

Organiser: International Tunisian Fairs Company

Focus: Exhibition, conferences and seminars designed to present resources, production and current developments in the field of packaging and printing.

2012 Participation *: n/a

Next event: 24-27 April 2013, Tunis

Information : www.packprint-tunisia.com.tn



GARDEN EXPO'2013

Sector: Horticulture, gardening

Number of editions: 2

Organiser: International Fairs & Exhibitions

Focus: Fair focusing on gardens, plants and their environment.

2012 Participation *: n/a

Next event: 9-11 May 2013, Tunis (Soukra Expo)

Information : www.soukra-expo.com/garden-expo/

ExpoJardins Ariana

Sector: Gardens & gardening

Number of editions: 2

Organiser: CTF Expo

Focus: Horticulture, landscaping and swimming exhibition.

2012 Participation *: n/a

Next event: 19-24 March 2013, Ariana

Information : www.soukra-expo.com/garden-expo/

* Figures supplied by the organisers

BUSINESS OPPORTUNITIES IN THE MEDITERRANEAN



focus on AGRI-FOOD in TUNISIA

This guide is a Doing business toolkit dedicated to clusters, SMEs, or entrepreneurs interested in developing business partnerships in the agri-food sector in Tunisia. It provides an overview of the main opportunities available for the private sector, as well as concrete and useful data to those interested to go further.

It has been prepared by ANIMA Investment network under the EuroMed@Change Project, a Preparatory Action initiated by the European Parliament and implemented by the European Commission (DG Enterprise and Industry).

EuroMed@Change proposes new dynamics for SME and cluster internationalisation between Europe and 4 targeted partner countries: Morocco, Tunisia, Egypt and Lebanon. It is managed by four organisations from across Europe (ANIMA Investment network as Project leader, the European Business Innovation Centre Network, INNO AG and the Fondation Sophia Antipolis as partners) and it coordinates with more than 45 associated regional business, finance and innovation networks.