



Strategic Review on Food Security and Nutrition in Tunisia



Executive Summary

Introduction

This strategic review has four objectives:

- To establish a comprehensive and participatory analysis of the food security and nutrition situation within the targets of Sustainable Development Goal 2;
- To determine the progress that policies, programmes, institutional capacities and resource flows aimed at improving food security and nutrition have made;
- To identify the challenges, gaps and/or weaknesses of the policy and programmatic responses;
- To discuss and prioritize actions that will be required to fill response gaps and accelerate progress toward improved food security and nutrition.

Food and nutrition security relates not only to food issues, but also to broader areas of development, overall peace, security and stability, as articulated by the SDGs. Furthermore, the review adopted the assumption that food and nutrition security is inseparable from agricultural security.

Over the past two decades, Tunisian agriculture has made significant progress, notably by achieving self-sufficiency in certain products (milk, meat, fruit and vegetables), limiting import dependence and strengthening its presence in foreign markets as a result of the good quality/price ratio of its products.

The review also recognises that the social protection system constitutes a key instrument which can be leveraged to ensure access to food for the most vulnerable groups and promote community resilience. The social protection system is a mechanism to mitigate and where relevant eliminate food insecurity and hunger at household level. Well designed and well implemented social protection programs can effectively address the causes of food insecurity.

However, it is important to consider the various challenges that Tunisia is facing, and furthermore, it is legitimate to ask, will the available agricultural land be sufficient to feed 14 million inhabitants in 2050? Will Tunisia be able to achieve the targets of the SDGs on which it has embarked?

Analysis of the food security and nutrition situation in Tunisia

The analysis undertaken in the framework of this review essentially calls to mind an important number of risks which challenge food security in Tunisia at a time when the country is undergoing a major political transition. Indeed, the following emerges from the assessment:

Agricultural sector

- A relative decrease of agriculture's share in the GDP, while agricultural added value remains low and falls short of that of comparable countries.
- Factor productivity (notably, capital's) remains relatively low.
- The sector acts as a buffer in face of shocks that destabilize the Tunisian economy.
- The sector has been able to recover its productivity lag in comparison to the world average, but has been surpassed by that of comparable countries and is still experiencing a large volatility, which discourages investment and risk taking.
- Persistent deficit in the food trade balance, which deteriorated sharply after 2011.
- Stagnant investment.

- Numerous threats, including climate change and depletion/degradation of natural resources.
- Governance problems, poor administrative and professional frameworks.

Availability

- In general, food availability does not pose a significant challenge in Tunisia: food is mostly available, either domestically produced or imported.
- Improved production and local productivity have not prevented an increase in food imports:
 - Foodstuffs represent 9.2% of total imports.
 - The share of cereals in the value of food imports exceeds 43%, and is followed by vegetable oils and sugars and derivatives.
- Nevertheless, risks to availability include:
 - Climate change and natural resources degradation (water, soil and land).
 - The dependence on cereals imports (about 60%).
 - Biosecurity, infectious diseases, logistics and storage.

Access

- **Physical** access is virtually guaranteed nation-wide:
 - The distribution of agricultural production and fisheries is assured by the public sector, while the private sector controls distribution channels for poultry products.
 - The road network provides almost all of people's mobility and accounts for about 80% of domestic freight transport.
 - Risks: Infrastructure degradation and declining logistical performance.
- However, **economic** access is called into question by economic and monetary barriers including: price inflation and deterioration of purchasing power, unemployment, dependence on imports, and low economic growth.
- The most vulnerable groups in terms of access to food are:
 - People living in rural areas.
 - People living in the Central West and North West regions (where poverty rates exceed 32%).
 - Women and children, especially in low-income rural households headed by women (whose livelihoods depend on casual, underpaid agricultural labour).

Utilisation

- Dietary habits are changing, but cereals remain predominant:
 - Increase in products of animal origin, in particular milk and dairy products.
 - Strong increase in the proportion of proteins of animal origin in the protein ration.
 - Nevertheless, cereals still account for almost 50% of energy requirements, and Tunisia's consumption of wheat as a percentage of total caloric intake is the highest in the world.
- Food waste is a serious problem:
 - Bread is the most wasted product (around 16%).
 - In food retailing, food waste reaches 2.8 million Tunisian dinars (USD 1.2 million), and in households an average of 17 dinars (USD 7) per month.
- Nutrition-related health risks include:
 - About 46% of Tunisians aged 20-69 are overweight, and women are most affected by obesity.
 - High prevalence of iron deficiency anaemia (29%).
 - The dietary transition can cause an epidemiological transition: increase in the prevalence of diabetes, cardiovascular diseases, cerebrovascular diseases and certain cancers.

Stability

A set of factors threaten the stability of food security, including:

- Dependence on cereal imports.
- Growth in the overall value of food imports, price volatility in domestic and international commodity markets.
- The aggravation of food production variability and consequent deterioration of food availability.
- Tunisia's political stability has been undermined by the impact of violence and terrorism, as well as by social unrest.
- Other mid and long-term risks related to climate change.

Review of the food security and nutrition policy response

1- The state of food security: Tunisia has not experienced any situation of food shortage and / or severe supply difficulties leading to food insecurity in decades. Issues of availability and access to food have not arisen for many years. In fact, Tunisia is one of the three African countries to be ranked globally in the "good performance" category in terms of food and nutrition security.

2- Social protection: Tunisia has a relatively broad social protection floor. Moreover, it is thanks to its social safety nets, and more particularly to the General Compensation Fund (*Caisse Générale de Compensation*), that the country was able to fend off the worst repercussions of the world food crisis of 2007-2008.

3- The health system: the Tunisian health system coverage is relatively good. Enormous progress has been made since independence; particularly in the areas of maternal and child care. However, food-related health problems begin to appear, notably obesity. This adverse effect particularly affects women and is due in part to distortions created by subsidy choices (prices of subsidized products encouraging unbalanced consumption).

4- Alongside these aspects, it is also worth noting the interest that has been given since the mid-1980s to the need for macroeconomic stability, environmental protection and broader security-related issues.

Gaps and challenges to food security and nutrition in Tunisia

The review identified numerous risks to agricultural security. They relate to: land-use problems, the unreasonable use of pesticides, the depletion of groundwater, pollution, desertification, inadequate food distribution channels, a lacking organization of rural areas, inadequate institutional support for the agricultural sector, rising food production and consumption costs, slow economic growth, climate change, and water stress.

In addition, the country must take account of and protect itself in face of challenges which may drive food insecurity. In particular, these challenges include:

- Availability: the country is heavily dependent on foreign trade for food and the increase in domestic food production is hampered by current and projected climatic conditions, technical and financial weaknesses.
- Physical and economic access to food: this dimension will be the main challenge in the coming years. Indeed, the slowdown in economic growth combined with insufficient GDP per capita hinders the ability of the poor to reduce their expenditure on food.
- Utilisation and consumption habits: these are dependent on domestic market prices. As long as the current distortions in the prices of subsidized products persist, the Tunisians' consumption will tend to remain unbalanced.
- Stability: risks concerning this dimension are linked to food trade imbalances.

In addition to these strictly food security risks, our country faces several other challenges, notably:

- Climate change and the degradation of available natural resources (water and soil resources are scarce, damaged agricultural land, siltation of dams).
- Trade liberalisation including the opening of borders to agricultural products in the framework of the WTO (World Trade Organisation) and the planned ALECA (*Accord de Libre Échange Complet et Approfondi*) trade agreement with the European Union.
- Regional inclusion and development, in particular in rural areas, which is slow to materialize.
- Problems with the targeting of the beneficiaries of social safety nets.
- The agricultural sector is not vocationally attractive to young people, not respectful of workers' rights, and low-tech.
- Land tenure fragmentation and the proliferation of small farms.
- A highly bureaucratic institutional framework lacking in incentives and transparency

Recommendations for priority axes to achieve SDG 2

In light of the above, this review affirms the need for a **new national food and nutrition security strategy**.

Tunisia will very swiftly need to put in place a new development model to meet the expectations of farmers, consumers, and all of its citizens; by creating new relations between cities and the countryside, between the interior and coastal, North and South regions.

The food and nutrition security strategy should equally take into consideration the evolution of geopolitical relations between the north and south of the Mediterranean, and between developed countries and the rest of the world.

The success of the advocated strategy depends on many factors, the most important of which being **confidence**. This confidence can only exist if this strategy benefits all stakeholders and is implemented in a participatory manner. The strategy implies:

1. Policy measures:

- The establishment of a **National Food Security and Nutrition Council**, bringing together political, business, scientific, civil society and regional authorities to highlight the existence of a strong national political commitment to achieve the objectives of the strategy and to leverage the adoption of a participatory approach for its realization.
- The establishment of regional Food Security and Nutrition Councils to promote regional consultation mechanisms, and in order to continually improve locally implemented programmes.

2. Horizontal measures:

- The development of a national food security index, drawn up periodically by the National Statistics Institute (INS), which will allow the progress in the implementation of the national strategy to be monitored, with a view to making timely corrections to the policies and programmes implemented.

3. Sectoral measures:

a. Agricultural sector:

- The launch of a specific program for the support of smallholder farmers, which shall be accompanied by adjustments in macroeconomic policies (such as the liberalisation of

the job market); and the strengthening of self-sufficiency through the enhancement of national cereal supply.

- The adoption of a new import policy, entrusting the management of imports to the Office of Commerce and reviewing the tasks of the offices of oil and cereals, aiming at improving of the storage infrastructure in their respective fields, as well as to provide more consistent support to producers.
- The reduction of commercial risks through better coordination and regional integration, and/or investment in strategic reserves (both physical and virtual, in relation to futures markets, in order to cover for approximately three months of imports).
- The separation of electricity and water production from distribution, through two independent legal entities; the fixing of a minimum percentage of agricultural GDP to be destined to water and soil conservation and to fight desertification, as well as a percentage of the Ministry of Agriculture's budget for training on this matter; the adoption of a new approach towards water management, favouring the re-use of wastewater and the desalinisation of sea water, tackling waste and losses during transport.
- The promotion of local products through the development of value chains, the encouragement of organic farming and the use of distinctive signs of quality (local produce, labelling and appellations of origin).
- The creation of new structures for the marketing of agricultural products, with a new legal status and renewed management practices; and the replacement of the existing food distribution channels upgrade program by a new program which shall be better aligned with the needs of the national economy.

b. Social protection and school feeding:

- Improve the effectiveness of the social protection system, which constitutes a solid investment in human capital, and an efficient means to advance social inclusion.
- Reinforce an over-arching social protection floor which includes:
 - Access to a nationally defined set of goods and services, constituting essential health care, including maternity care, that meets the criteria of availability, accessibility, acceptability and quality.
 - Basic income security for children, at least at a nationally defined minimum level, providing access to nutrition, education, care and any other necessary goods and services.
 - Basic income security, at least at a nationally defined minimum level, for persons in active age who are unable to earn sufficient income, in particular in cases of sickness, unemployment, maternity and disability.
 - Basic income security, at least at a nationally defined minimum level, for the elderly.
- Reaffirm the role of school feeding as an indispensable component of the social protection floor.
- Improve targeting to reach the most vulnerable families in order for them to benefit from social safety nets, including school feeding. The National School Feeding Programme constitutes a reliable income transfer and an indirect way to reduce household education expenditure and school dropouts.
- The generalization of the school meals program to all primary schools and the introduction of a new form of participatory management of primary school canteens.
- The establishment of links between local farmers' groups, particularly through rural women's community organizations, and school canteens to promote the use of locally produced food and encourage local development.

c. **Nutritional education:**

- The design and implementation of an inter-ministerial strategy to rationalize the consumption of certain strategic products through price policy on the one hand and nutrition education on the other.
- The design and implementation of training and awareness programs focused on food quality and adapted to different consumer segments.
- Encourage the consumption of local products and raise awareness about the harmful effects of some imported products.

d. **Consumer protection:**

- The strengthening of food quality control, by equipping control structures with the necessary technical means.
- The implementation of standards for the classification of fresh produce.

e. **Risk management:**

- The adoption of a preventive approach to the management of risks which may hinder food security.

Finally, it is essential to point out that the key success factors in any such enterprise encompass: political vision and political will, a healthy social climate, the adoption of a participatory and inclusive approach, a peaceful security situation, an attractive business climate, and macroeconomic stability over the short, medium and long terms.