



AGRIFOOD INDUSTRY IN TUNISIA...

INVEST IN TUNISIA

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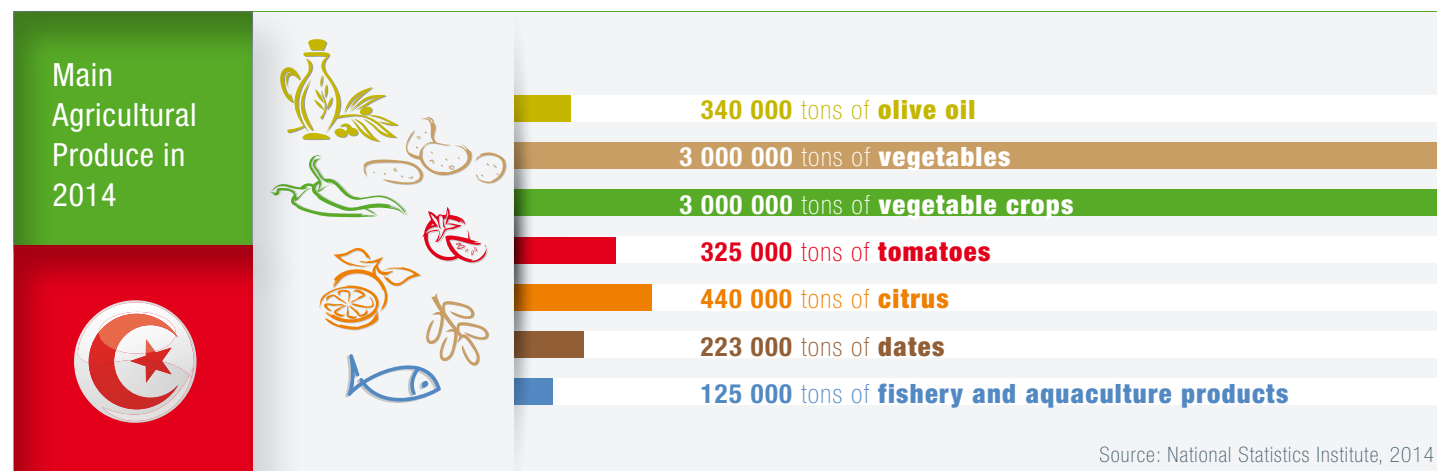
LEADING SECTOR IN TUNISIAN INDUSTRY

Agrifood industry is one of the **strategic industrial sectors** in Tunisian economy. It is uniquely positioned in the industrial fabric and is **the third job provider in manufacturing**. This is reflected by:

- **More than 1 060** companies, 201 of which are totally exporting;
- **2 048.8 TND Million** in exports in 2014;
- **60.4 TND Million** of foreign direct investment made in 2014.

France, Italy and the Netherlands are the main investors in Tunisia.

Tunisia is | the **1st** world **exporter of olive oil** (campaign 2014-2015).
the **1st** world **exporter of dates** in terms of value (campaign 2014-2015).



1 TND = 0.443 Euro = 0.588 USD (Average Exchange Rate, 2014)



BOOMING ORGANIC PRODUCTION

Tunisia has strongly developed its expertise in organic farming. It is the **2nd African exporter** of organic products. It mainly involves olive oil, dates, vegetables, aromatic and medicinal plants and vines.

About **80%** of Tunisian organic produce is exported.

Tunisia exports over **60 organic products** to 5 continents.

Private inspection and certification bodies exist in Tunisia such as ECOCERT, IMC, LACON, DEMETER and serve several value chains involved in organic farming such as olive growing, fruit-tree crops and forestry, vegetable crops and fodder...

Specific incentives for organic agriculture have been implemented by the Tunisian government to encourage the development and improvement of this industry's performance.

Tunisia is the **8th country accredited** as an organic exporter to the EU market.

Tunisia is the **only African country** having the recognition of equivalence with the EU and Switzerland pertaining to organic agriculture.

AVAILABLE AND SKILLED HUMAN RESOURCES

Tunisian human resources are skilled, qualified and competitive at all levels. Consistently in line with business needs, they represent a rich pool of talent constituting one of the major assets of the country through their **proficiency in foreign languages, sense of adaptation and creativity**.

The availability of human resources with proven expertise enables Tunisia to be **well ranked in terms of cost competitiveness**.

The disciplines of agriculture, forestry, fisheries and veterinary science are a real source of expertise with over **1,200 Tunisian graduates** per year.

Guaranteed
Inter-professional
Minimum Wage
(SMIG)

289.639 TND
(40 hours/week)
≈ **128.31 €**

Guaranteed
Agricultural
Minimum Wage
(SMAG)

13 TND
(daily wage)
≈ **5.76 €**

SYNERGY BETWEEN RESEARCH CENTRES AND COMPANIES

Tunisia has an interfacing structure between the socio-economic world and the research community aimed at identifying and reconciling supply and demand from the university and the business world.

A real synergy exists between research centres and companies operating in Tunisia through **64 laboratories** and **270 research units** devoted to the disciplines of life sciences and biotechnology. Moreover, some groups, like Danone and Poulina integrated biotechnological applications into their production systems.

COMPLIANCE WITH STANDARDS

In Tunisia, the development of **quality standards**, covering the sanitary, organoleptic, technological and quality aspects, has been a key element in improving the competitiveness of the various branches of the sector.

Since 2001, Tunisia has been following **the international standard** in terms of food safety management systems developed by ISO (ISO 22000).

In addition, a specific **control and prevention** system, known under the international name "Hazard Analysis Critical Point" (**HACCP**) has been adopted.

INSTITUTIONAL FRAMEWORK OF AGRIFOOD INDUSTRY

Along with airport, maritime, road and telecommunication infrastructures which are among the most advanced in Africa, Tunisia has a quality **technological infrastructure** dedicated to agrifood industry.

The **Bizerte Agrifood Technology Park "AGROTECH"** that covers over 45 hectares stands out as a facilitator-coordinator of the Tunisian food industry and is complementary to various existing bodies and institutions.

This network has **31 partners** (23 Tunisian and 8 foreign) and a core of industry professionals composed of **102 companies**.

In addition, Tunisia has put in place research centres and several support structures such as the Foreign Investment Promotion Agency (FIPA-Tunisia), the Agency for the Promotion of Agricultural Investments (APIA), the Technical Agrifood Centre (CTAA), the Technical Centre for Organic Agriculture (CTAB), the National Federation of Food (FENAAL), the Association of Canned Food Industries (GICA) ...

AGRO'TECH

64
laboratories

CLUSTERS

270
research
units

HACCP



A FAVOURABLE INVESTMENT ENVIRONMENT

The investment incentives code provides for the following:

- > **A reduced Tax rate of 10%** for export earnings and agricultural projects,
- > **Investment subsidies** for agricultural development,
- > **State participation** in employers' contributions to social security schemes and in infrastructure expenses in regional development zones,
- > Investment is made upon **simple declaration**,
- > Possibility for foreign investors to hold up to **100% of the project's capital** without prior authorisation,
- > **7% grant** on primary processing of agricultural and fisheries products and their packaging,
- > **Grants allocated** to support regional development that can reach 25% in specific areas for project implementation and 30% for organic agriculture,
- > **Possibility for foreigners to invest in agriculture** in the framework of agricultural land lease.

PROMISING ACTIVITIES

Investing in food industry, one of the strongest links in the economy, means grasping the opportunities offered in the following niches:

- Organic products
- Packaging and olive oil bottling
- Packaging and semi-preserves of fruits and vegetables
- Frozen products
- Cooked and semi-cooked dishes
- Canned products (tomatoes, sardines, harissa, ...) and semi-preserves
- Processed seafood products and development of blue fish products
- Fish and shellfish farming
- Dried tomatoes
- Essential oils ...

tax rate of
10%

100%
of the
capital



7%
grant



SUCCESS STORIES

ALSA ■ COCA COLA ■ CRISTAL
■ CHAMBOURCY ■
FROMAGERIE BEL ■ DANONE
■ EMMY ■ GROUPE EVEN ■
GROUPE LACTALIS ■
GROUPE SODIAL ■ HEINZ ■
INDUSTRIES LASSONDE ■
JUTA ■ MAIZENA ■ NESTLE ■
ORANGINA ■ PRESIDENT ■
SANLUCAR ■ UNITED
BISCUITS ■ YOPLAIT...

"Today, Tunisia has implemented many incentives to welcome investors with open arms. And I think all the opportunities that Tunisia offers today to Europe and North African countries to have trade exchanges -profitable exchanges- are great opportunities for all investors."

Mr Arby HAMANE,
Director for Africa, VIOLAR S.A.,
(Trade in cotton, grain and food industry)
June 2015

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