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The Tunisian experience in olive oil export: An analytical study

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***Abstract*---**This study addresses Tunisia's experience in exporting olive oil, considering this product of great importance to the country, as Tunisia has ranked among the top olive oil–exporting nations, preceded only by Italy and Spain. This prominent commercial position is partly attributed to supportive and encouraging policies for olive oil exports. The study found that Tunisia possesses a comparative advantage in this product: according to both the Balassa Index / RCA Index and the Lafay Index, Tunisia is strongly specialized in olive oil. However, the sector faces several obstacles, the most significant being logistical costs—especially transportation expenses—along with the difficulty of finding foreign buyers and the multiplicity of stakeholders involved in its promotion. To overcome these challenges and enhance the level of olive oil production and export, it is necessary to improve quality, efficiency, and competitiveness throughout the production chain. This includes the adoption of better farming and harvesting techniques, timely and efficient transportation of olives, well-organized olive oil mills, and the establishment of traceability and certification systems to meet the requirements of retailers and premium markets.

***Keywords*---**Tunisian Experience, Olive Oil Export.

Introduction

The olive tree in Tunisia represents an essential factor in the economic and social stability of producing regions and has become part of the Tunisian cultural identity. The origins of this tree in Tunisia date back to the Phoenician period, when the Phoenicians introduced it. Today, olive groves extend over 1.8 million hectares, comprising nearly 88 million olive trees distributed across the country, producing about 8% of the world's total output. Olive oil is one of the most important agricultural products in Tunisia and holds strategic significance for the

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country. Tunisian olive oil is renowned for its quality, taste, and golden color—often referred to as "liquid gold." The diversity of olive oil varieties in Tunisia gives the country an advantage in offering a range of flavors that meet consumer demands. Moreover, according to an official from the International Olive Council, based on her experience tasting olive oils worldwide, Tunisian olive oil is among the finest in terms of quality and flavor, supported by the availability of modern mills and world-standard storage facilities.

From this perspective, the study raises the following research question:
To what extent has Tunisia succeeded in establishing a strong position in global markets for olive oil exports?

Methodology
To address this main research question, the study applies a descriptive-analytical approach. It reviews the current situation of olive oil exports in Tunisia—particularly in recent years—by collecting and analyzing secondary data and conducting field-level primary data collection.

Temporal and Spatial Scope:
The study examines Tunisian olive oil exports during the period from 2000 to 2017, given the importance the Tunisian government attaches to this product and its leading position in global markets.

Research Objectives:
This study aims primarily to provide a comprehensive overview of Tunisian olive oil exports and their global and national standing. It also seeks to diagnose the challenges facing the sector and propose a set of recommendations for its development. On a more specific level, the study intends to offer insights that could benefit developing and Arab countries in general, and Tunisia's neighboring countries in particular, by drawing lessons from Tunisia's successful experience.
The study is structured around four main axes:

1. A general introduction to Tunisian olive oil
2. Tunisia's performance in olive oil exports
3. Competitiveness of Tunisian olive oil and its import markets
4. Diagnosing challenges in olive oil exports and proposed solutions

First section: A General Introduction to Tunisian Olive Oil
1. Olive Oil Classifications According to Standards:

Olive oil subject to international trade is categorized and defined according to its type and chemical composition. These classifications are determined by international standards, including Tunisian specifications, the International Olive Council (IOC), European Union standards, and Codex Alimentarius standards. While broadly consistent, these classifications sometimes differ in terminology or in the minimum and maximum values of certain chemical analyses.
Olive oil is strictly defined as oil obtained solely from the fruit of the olive tree, excluding oils extracted using solvents or re-esterification methods, as well as any blends with oils of other natures. It is marketed under the following categories and definitions:

- Virgin Olive Oil: Obtained from the olive fruit solely by mechanical or other physical means under specific thermal conditions, without altering the oil and without any treatment other than washing, decantation, centrifugation, and filtration. This type includes three subcategories:
    - Extra Virgin Olive Oil: Free acidity not exceeding 0.8%.
    - Virgin Olive Oil: Free acidity not exceeding 2%.
    - Ordinary Virgin Olive Oil: Free acidity less than 3.3%.

If acidity exceeds 3.3%, the oil becomes unsuitable for consumption and is referred to as Lampante Virgin Olive Oil, designated for industrial refining or technical uses. After refining, it becomes **Refined Olive Oil**, with acidity not exceeding 0.3%, and it must retain its original glyceridic structure during refining.

- **Olive Oil (Blend):** A mixture of refined olive oil and virgin olive oil fit for consumption in its extracted form, with maximum acidity of 1%.

Beyond acidity, other essential standards are required to define these classifications, which also set the necessary parameters for monitoring the purity and quality of olive oil[1].

Table: Olive Oil Classifications According to Standards

Type of Olive Oil	Tunisian Standards	International Olive Council Standards	European Union Standards	Codex Alimentarius Standards
Extra Virgin Olive Oil	Acidity ≤ 0.8	Acidity ≤ 0.8	Acidity ≤ 0.8	Acidity ≤ 0.8
Virgin Olive Oil	Acidity ≤ 2	Acidity ≤ 2	Acidity ≤ 2	Acidity ≤ 2
Ordinary Virgin Olive Oil	Acidity ≤ 3.3	Acidity ≤ 3.3	Not specified	Acidity ≤ 3.3
Lampante Virgin Olive Oil	Acidity > 3.3	Acidity > 3.3	Acidity > 2	Not specified
Refined Olive Oil	Acidity ≤ 0.3	Acidity ≤ 0.3	Acidity ≤ 0.3	Acidity ≤ 0.3
Olive Oil (Blend)	Acidity ≤ 1	Acidity ≤ 1	Acidity ≤ 1	Acidity ≤ 1

Source: Aïda Ellazzaz, *Tunisian and International Standards for Olive Oil*, Ministry of Agriculture, Water Resources and Fisheries, Tunisia, October 2017, p. 73.

2. Conditions for Practicing the Activity of Exporting Tunisian Olive Oil

The specifications notebook regulating the export of Tunisian olive oil defines administrative, technical, and sanitary conditions, summarized as follows[2]:

2.1. Administrative Conditions

- Any applicant wishing to engage in the export of Tunisian olive oil must submit **two copies** of the specifications notebook, initialed on every page and signed by them, to the *General Directorate of Agricultural Studies and Development* at the Ministry of Agriculture and Water Resources, 30 Alain Savary Street, 1002 Tunis. One copy will be returned to the applicant, certified by the Directorate as proof of notification. Upon submission, the Directorate registers the applicant's name on the list of exporters.
- Every exporter must meet the following requirements:

  - Be registered in the commercial register.
  - Possess a customs identification number.
  - Possess a tax number.
  - Have declared their activity with the Tax Control Office.
  - Possess a minimum capital of 700,000 Tunisian dinars (except for exporters of organic or packaged olive oil).
  - Own or lease storage facilities for olive oil equipped with insulated tanks of at least 100 tons capacity.
  - Own or contract with a certified laboratory for physico-chemical and sensory analyses, approved by the relevant authorities.
  - Ensure that all storage facilities comply with the requirements of the specifications.
  - Transport bulk olive oil only in containers meeting applicable standards and regulations.
- The exporter must notify the Ministry of Agriculture and Water Resources promptly of any change of address for olive oil storage facilities intended for export, either directly or by registered mail.
- Each exporter must, upon request and on-site, present a copy of the specifications and all required supporting documents necessary for practicing the activity in accordance with applicable laws and regulations.

2.2. Technical and Sanitary Conditions

- Olive oil storage facilities must meet the following conditions:
  - Olive oil intended for export must be stored in underground cisterns, buried tanks, or above-ground tanks made of inert materials (glass, enamel-coated surfaces, sandstone) or treated metallic materials preventing reactions between the oil and the tank's metallic elements, and must be located in facilities specifically designed for this purpose.
  - Underground tanks must be built with stone or cement and lined internally with glass or white ceramic tiles.
  - Metal tanks must be made of mild steel or stainless steel with food-grade coating, placed above ground in covered facilities designated for olive oil storage.
  - Storage facilities must be located away from any sources of unpleasant or foreign odors, given olive oil's ability to absorb volatile substances and fat-soluble materials, which could compromise its sensory and organoleptic properties.
- The exporter must take all necessary precautions to prevent any alteration of olive oil characteristics during storage, particularly due to:
  - Reactions with the metallic elements of the tank.
  - Reactions with water content and volatile substances.
  - Oxidation processes.
- Exporters must promptly eliminate sedimented water and impurities at the bottom of tanks by transferring oil from one tank to another. For above-ground metal tanks, sedimented water may be drained via a special valve at the tank's bottom, in addition to the transfer method. Metal tanks must be insulated with suitable materials to reduce the effects of temperature fluctuations, particularly for high-quality oils.

- Exporters are required to comply with the standards established under the International Olive Oil Agreement, as well as national health and safety regulations concerning facilities and warehouses dedicated to export-bound olive oil. They must also ensure the health inspections of their staff.
- Every bulk olive oil exporter must achieve a minimum export quantity of 500 tons of bulk olive oil per season, within a period not exceeding two seasons.

Section Two: Tunisia's Performance in Olive Oil Exports

The Ministry of Trade in Tunisia sets the olive oil export season from November 1 of each year to October 31 of the following year[3].

1. Exports of Tunisian Olive Oil

The year 2015 was a record year for olive oil exports over the past decade. Tunisian olive oil exports increased by 4.3% over the last ten years—an encouraging indicator that reflects the growing global demand for Tunisian olive oil, explained by the improvement in product quality and its alignment with consumer requirements.

However, exports during the 2015–2016 season registered a significant decline of 63% in value (872 million TND compared to 1,892 million TND in 2015) and 54% in volume. This contraction, equivalent to a decrease of about 180 thousand tons, was mainly due to a production drop of nearly 115 thousand tons compared to the previous season, which was exceptional both in terms of production and exports.

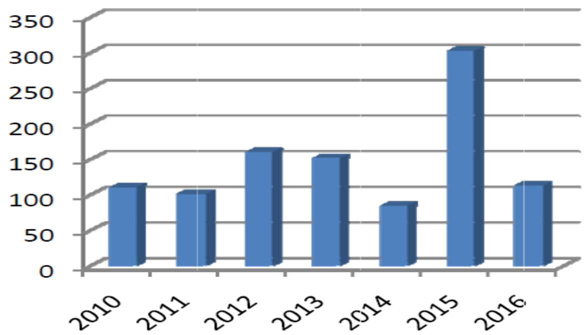

Figure: Olive Oil Exports in Million Tunisian Dinars

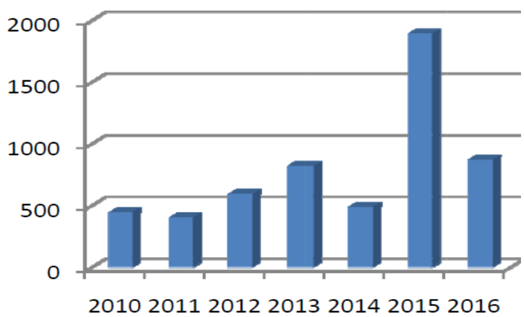

Figure: Olive Oil Exports in Thousand Tons

Source: Tunisia Statistics, *Results of Foreign Trade 2016*, p. 7.

2. Olive Oil Tilting the Balance of Tunisia's Food Trade

The olive oil sector contributed to improving Tunisia's external trade indicators. During the first eleven months of 2015, the food trade balance recorded a significant improvement in the coverage rate of imports by exports, reaching 100%, compared to 55.8% during the previous year.

This positive shift in the value of food exports—equivalent to the value of imports—is largely attributable to the rise in olive oil export revenues, which represented 53% of total food exports compared to only 18% the previous year.

In 2015, the revenues from food exports reached 3,500 million TND, a growth of 100% compared to the same period in 2014. This was primarily due to the unprecedented surge in olive oil export revenues, which increased nearly sixfold, reaching 1,835.2 million TND, equivalent to 293.6 thousand tons, compared to 56.5 thousand tons during the same period in 2014.

Regarding the composition of food exports, oils and fats—chiefly olive oil—ranked first, accounting for 53% of total food exports by November 2015. Dates and citrus fruits ranked second (12.6%), followed by seafood products (fish and shellfish) at 6%[4].

Section Three: Competitiveness of Tunisian Olive Oil and Its Import Markets

1. Competitiveness of Tunisian Olive Oil

Tunisia ranked **first worldwide** in olive oil exports during the 2014–2015 season, with exports reaching 300 thousand tons and revenues exceeding 2 billion TND, overtaking Spain, which—along with other European countries—was adversely affected by climatic conditions. However, Tunisian production declined relatively in 2016.

In 2017, Tunisia ranked fourth among olive oil–producing countries worldwide, after Spain, Italy, and Greece, while occupying the third rank globally in exports, after Italy and Spain. Other major exporting countries include Turkey, Portugal, Syria, and Morocco. Tunisia exports about 70% of its production, the highest export share among all producing countries[5].

To analyze the competitiveness of Tunisian olive oil in global markets, the following indicators were selected[6]:

- **Specialization (Balassa Index / RCA Index):**
  Known as the *Revealed Comparative Advantage* (RCA), this index identifies product groups in which a country holds a clear competitive advantage in international trade. For trade analysis, RCA is more appropriately viewed as a specialization index (IS). In simple terms, a country's revealed comparative advantage in exporting a given product is measured by the share of that product in the country's exports relative to its share in world trade.
  - A value < 1 indicates that the country is not specialized in exporting the product.
  - A value > 1 indicates that the country is specialized in exporting the product.
- **Specialization (Lafay Index):**
  This index reveals comparative advantage by comparing, in thousands of dollars, the trade balance of a given country in a specific sector with a theoretical balance assuming no specialization. Since it considers both exports and imports, it is particularly suited for countries with intra-

industry trade. To remove cyclical imbalances in global trade and to highlight product-specific or partner-specific specialization, the theoretical balance is calculated proportionally based on the global balance across products and partners.
This index is highly useful in identifying strengths and weaknesses (positive or negative values) of a given country and comparing them to competitors.

From the table below, it is evident that Tunisia is strongly specialized in olive oil. Between 2012 and 2013, the (Balassa/RCA) index rose to 25, and despite a decline in 2014 to -56.2, Tunisia maintained strong specialization, with the Lafay Index remaining constant at 1 for three consecutive years. In 2015, specialization surged nearly fourfold, with the Balassa/RCA Index reaching 168.5 and the Lafay Index increasing to 3. This strong specialization is attributed to the sharp rise in olive oil exports in that year, the highest recorded between 2010 and 2016.

Table: Competitiveness Indicators of Tunisian Olive Oil

Years	Specialization (Balassa/RCA Index)	Specialization (Lafay Index)
2015	168.5	3
2014	42.5	1
2013	98.7	1
2012	73.7	1

Source: Compiled by the researchers based on International Trade Centre (ITC) data.

2. International Awards for Tunisian Olive Oil

Tunisia is one of the world's largest producers of olive oil, with an average annual export value of about USD 0.5 billion over the past three years. Although most of Tunisia's olive oil is exported in bulk, some bottled brands have gained international recognition and won prestigious awards.
Recent statistics (2017) on organic farming worldwide, published by the Research Institute of Organic Agriculture (FiBL, Switzerland) and the International Federation of Organic Agriculture Movements (IFOAM) in *The World of Organic Agriculture – Statistics and Emerging Trends 2019* (released on Wednesday, February 13, 2019), show that Tunisia ranked first globally in terms of land area dedicated to organic olive cultivation among 30 olive-producing countries, with 255,000 hectares, followed by Italy (235,000 ha) and Spain (195,000 ha). The report also confirmed Tunisia's first place in Africa for land area under organic farming with 376,000 hectares, followed by Tanzania (278,000 ha) and Uganda (262,000 ha). At the global level, Tunisia ranked 24th out of 181 countries in terms of organic farmland, advancing by 23 positions, while Australia ranked first, Argentina second, and China third[7].[8]

- In 2018, as international recognition of the quality of Tunisian olive oil, Tunisia won 4 medals at the Athens International Olive Oil Competition (ATHIOOC), 3rd edition, where about 359 participants from Tunisia, Spain, Turkey, Greece, Italy, Portugal, and other countries competed. The winter olive oil "Mansour Domaine Jebel" from Zaghouan won the gold medal[9].

- Tunisia also won 16 medals at the 20th Los Angeles International Extra Virgin Olive Oil Competition, including 3 gold, 8 silver, and 5 bronze medals, in addition to the award for *Best Packaging Design – Édition Artisanale*, according to a statement by the Ministry of Agriculture. The 2019 competition, considered the most important in the United States, featured participants from 16 countries, including Tunisia, Argentina, Australia, Chile, China, Croatia, the USA, Greece, Italy, Japan, Lebanon, Portugal, South Africa, Turkey, and Uruguay, compared with 20 countries in 2018[10].

3. Import Markets for Tunisian Olive Oil

While the European Union—especially Italy and Spain—remains the primary destination for Tunisian olive oil exports, its share declined from nearly 90% before 2006 to about 60% since 2009, as shown in the chart. During the same period, exports to the United States, one of the world's largest importers, increased, reaching 20,000–30,000 tons since 2008. However, in 2013, Spain's imports of Tunisian olive oil surpassed those of the US. From 2015 to 2017, the ranking of importing countries remained: Italy first, followed by Spain, the United States, France, and Canada.

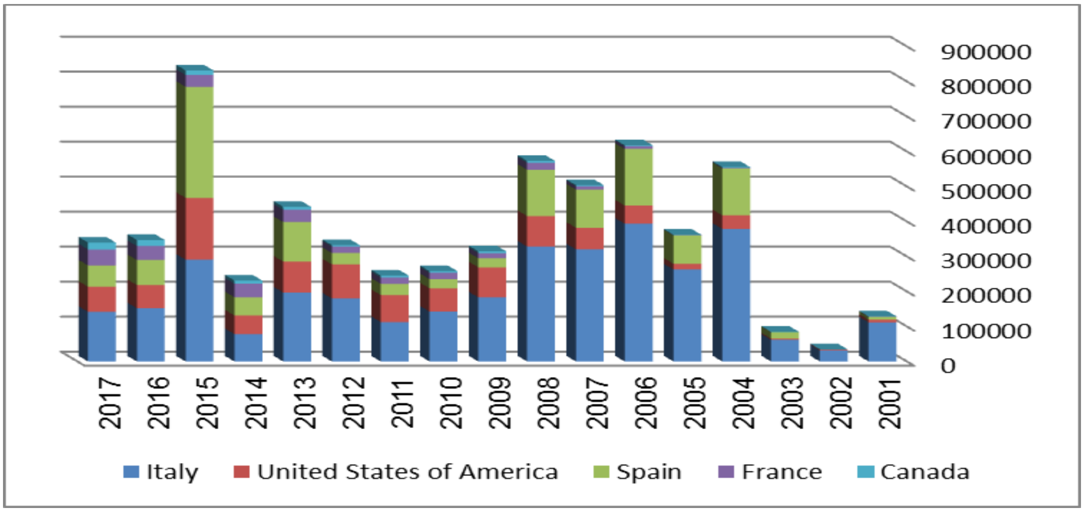

Figure: Top 5 Import Markets for Tunisian Olive Oil Exports
Source: Compiled by the researchers based on ITC calculations using UN COMTRADE statistics.

In detail, in 2017, Italy recorded the highest value of Tunisian olive oil imports, reaching USD 140,000, followed by the United States with half that value (USD 70,000), Spain (USD 60,000), France (just over USD 40,000), and Canada (USD 20,000). Other countries followed, with import values not exceeding USD 19,000, as shown in the chart below.

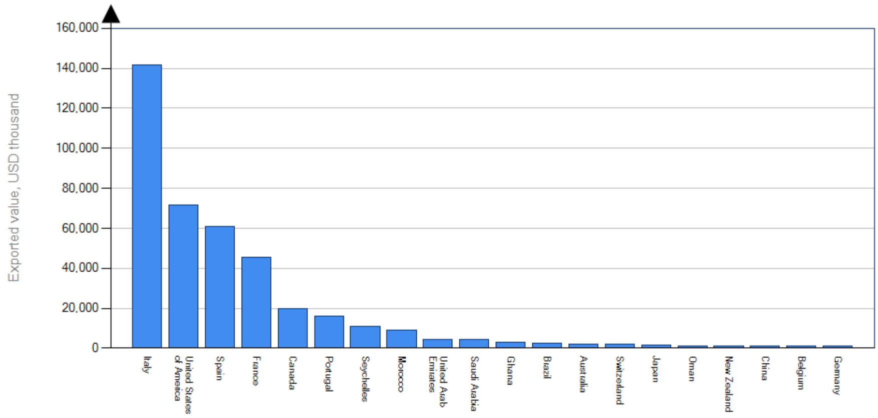

Figure: Tunisian Olive Oil Export Markets, 2017
Source: International Trade Centre (ITC)

The ranking of Tunisian olive oil export destinations is explained by demand determinants for this product, as expressed by two ITC indicators: **importing countries' product concentration** and **average distance of Tunisia's olive oil exports**, illustrated in the attached figure.

The product concentration index is measured using the **Herfindahl–Hirschman Index (HHI)**, which reflects the degree of import concentration within a country. The sectoral Hirschman Index is defined as the square root of the sum of squared export shares of each industry in total exports of the region under study. It takes a value between 0 and 1, where 1 indicates that only one product is exported. Higher values show that imports are concentrated in fewer sectors, while values closer to zero reflect a more equal distribution of shares.

The **blue circles** in the chart represent positive bilateral trade balances, while their **size** indicates the level of a country's olive oil imports—the larger the circle, the greater the country's imports compared to those with smaller circles. It is observed that geographic distance has not been an obstacle to the import of Tunisian olive oil by key markets, with Italy clearly topping the ranking of all countries[11].

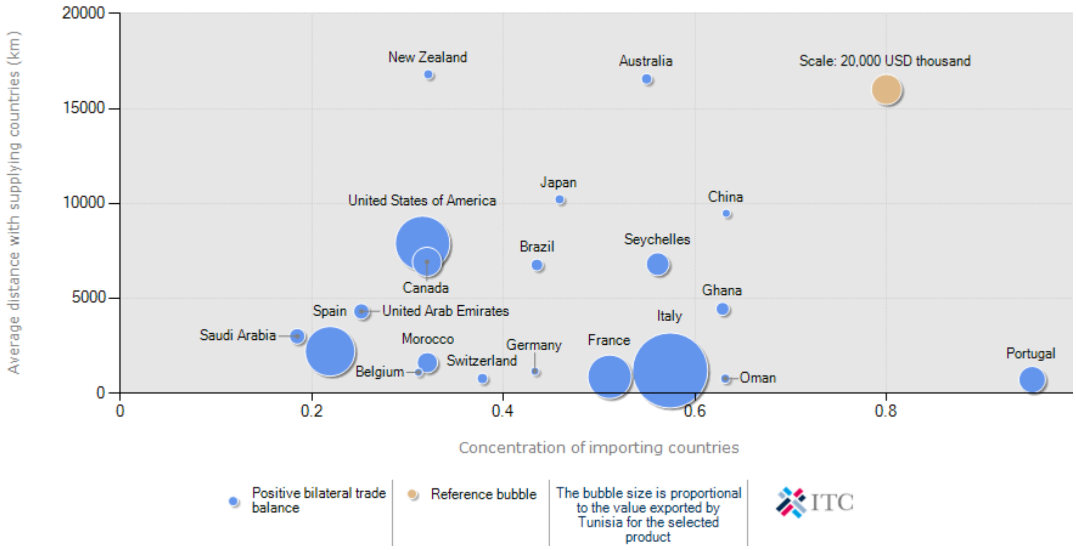

Figure: Importing Countries' Concentration and Average Distance of Tunisia's Olive Oil Exports, 2017
Source: International Trade Centre (ITC)

The ITC has also projected an increase in olive oil import values for several countries. It considers the Tunisian market as the closest supply link to markets with the highest potential demand for olive oil. According to the figure, the European Union—shown as blue circles—comes first, specifically Italy, which demonstrates the largest absolute gap between potential and actual exports in value terms, leaving room for an additional USD 258.8 million in exports. Next comes France, followed by North America (black circle), namely the United States of America, then Spain, and East Asia (red circle) represented by China in fifth place, followed by Germany.
Among Arab countries, the UAE ranks 14th, followed by Morocco, then Saudi Arabia in 16th place. The last projected market, according to ITC, is Indonesia, ranked 25th.

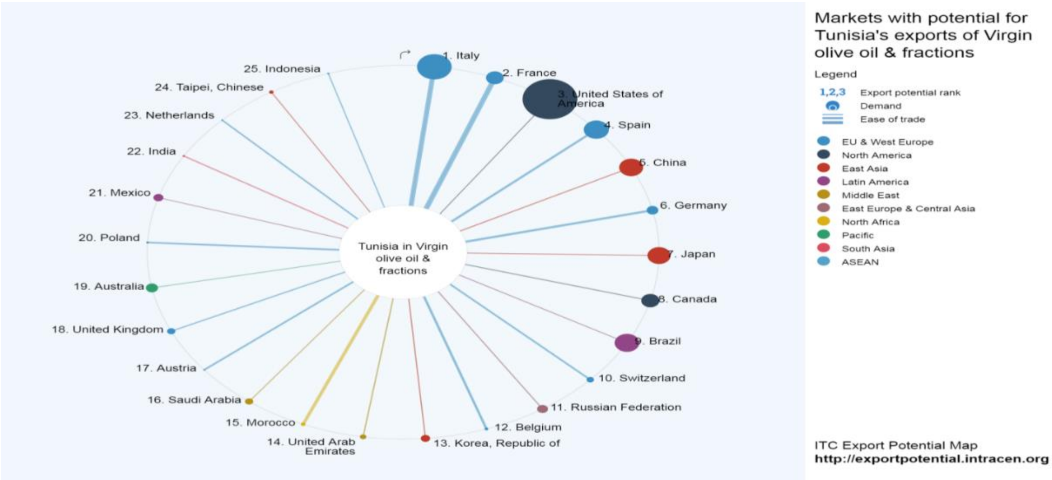

Figure: Potential Markets for Tunisian Olive Oil Exports
Source: International Trade Centre (ITC)

Section Four: Diagnosing the Challenges of Olive Oil Exports and Proposed Solutions

1. Diagnosing the Challenges of Tunisian Olive Oil Exports

The Tunisian olive oil sector faces several major challenges, among them[12]:

- Weak financial and human resources dedicated to managing the *Packaged Olive Oil Promotion Fund*.
- The multiplicity of stakeholders involved in promoting Tunisian olive oil (National Olive Oil Board, Ministry of Agriculture, Ministry of Industry, and Ministry of Trade), alongside the absence of a professional body within the olive oil system whose mission would be to design programs to highlight the advantages of packaged olive oil domestically and internationally.
- The inadequacy of subsidy ceilings compared to the significant budgets allocated by institutions for advertising and promotional operations.

A recent survey conducted by the Ministry of Trade, announced on Tuesday, December 19, 2017, revealed that Tunisian olive oil faces numerous obstacles, particularly in terms of quality and export. The survey confirmed that 66% of export barriers are linked to product quality, 52% to difficulties in finding foreign buyers, and 49% to high logistical costs, especially transportation. According to Fathi Baddour, Deputy Director at the Ministry of Trade, speaking during the scientific seminar on enhancing the value of Tunisian olive oil and improving its positioning in the global market (held as part of the 37th International Olive Festival in Kalaa Kebira, Sousse), the ministry has proposed several measures. These include giving greater attention to packaging, especially for organic olive oil, and intensifying participation in specialized international fairs and exhibitions.
During the 2017–2018 season, the Ministry of Trade continued supporting exports through the Export Promotion Fund, particularly in transportation, advertising, promotion, and market exploration. The ministry also worked to enable resident international trading companies to export packaged olive oil upon presenting a purchase contract from a certified exporting company.

It was further noted that olive oil ranked 8th among Tunisian exports during the last ten months of 2017 and 4th among agri-food exports, after citrus fruits, seafood, and dates. Olive oil exports over the past five years have not fallen below 15,000 tons, reaching around 60 destinations, mainly EU countries, Canada, and the United States. Tunisia's share of global olive oil production did not exceed 10% during the past decade, averaging 169,000 tons annually, compared to Spain's 1.26 million tons. Similarly, Tunisia's share of global olive oil exports over the past ten years did not exceed **33.5%**, achieved during the 2014–2015 season, when Tunisia ranked **3rd in global exports** with an average of 139,000 tons, after Spain (223,000 tons) and Italy (208,000 tons)[13].

2. Specific Measures for the Olive Oil Sector

Several measures have been identified to improve Tunisian olive oil, including[14]:

- Establishing a quality label and product traceability systems.
- Creating a national award for the best packaged olive oil and an export consortium.
- Launching a promotional program for Tunisian olive oil in export markets.
- Encouraging investment through partnerships.
- Allowing imports under temporary admission to meet external demand whenever domestic production declines.

A high-level meeting held on November 17, 2017, in Tunis, organized by the European Bank for Reconstruction and Development (EBRD) and the Food and Agriculture Organization (FAO), gathered nearly 80 stakeholders from Tunisia, Morocco, and Europe to discuss innovations in the sector. Key takeaways included:

- **Developing Export Operations:** Improving quality, efficiency, and competitiveness across the olive oil value chain—from orchard to table. This involves adopting better farming and harvesting techniques, timely and efficient transportation, well-organized olive mills, and traceability and certification systems to meet the standards of retailers and premium markets[15].
- **Knowledge Sharing:** Experts discussed orchard management, intensive olive farming, and improved irrigation techniques to optimize scarce water resources while maintaining olive quality. Innovations in extraction technologies were also presented to produce high-purity extra virgin olive oil. Some Tunisian organic producers have heavily invested in modernizing operations, including advanced irrigation systems and two-phase extraction processes, leading to international awards such as the BIOL Gold Medal for organic olive oil.
- **New Products:** Diversifying the product range is essential for the future of the sector. Tunisian extra virgin olive oil is known for its mild and sweet flavor. By offering flavored oils, single-variety oils, or oils rich in polyphenols, Tunisian producers can attract new consumer segments. Tunisia also produces three times more certified organic olive oil annually than Spain, and even larger volumes through organic or semi-organic practices without certification. With rising demand for organic products—valued at €30 billion in the U.S. alone in 2015—Tunisia is well-positioned to capitalize on its strong reputation in organic agriculture.

- **Moving Forward:** Collaboration and communication remain crucial. FAO and EBRD continue to support a Tunisian olive oil working group—comprising farmers, processors, exporters, government officials, and trade union representatives—that has met nearly seven times since 2015. This group has developed a shared vision and roadmap, and is now finalizing an operational plan to modernize the sector. According to FAO economist Lisa Paglietti: *"In the past two years, we have seen remarkable enthusiasm and openness to new ideas, such as creating a quality union and introducing quality labels for Tunisian extra virgin olive oil. There is a strong will for change, and as we move forward, we must maintain this momentum and ensure all stakeholders work together to achieve competitiveness and recognition of this sector's excellence."*

Conclusion

This study examined Tunisia's experience in olive oil export, highlighting olive oil as one of the country's most important agricultural and strategic export products. The key findings are as follows:

- Tunisia ranks third among olive oil exporting countries, following Italy and Spain. This prominent trade position is partly attributed to supportive policies encouraging olive oil exports.
- Fluctuations in Tunisian olive oil exports are largely due to rainfall variability, as most olive groves are rain-fed.
- Tunisian olive oil is among the finest worldwide, as evidenced by numerous international awards, including three gold medals in 2019.
- The year 2015 marked a record in olive oil exports over the last decade. Exports grew by 4.3% during this period, reflecting increasing global demand, driven by improved quality and alignment with consumer requirements.
- Tunisia holds a comparative advantage in olive oil. According to the study's indicators, the Balassa/RCA index recorded 168.5 in 2015, while the Lafay index stood at 3, confirming Tunisia's strong specialization in this product.
- The European Union, particularly Italy, Spain, and France, remains the primary destination for Tunisian olive oil exports, with Italy leading the list, followed by the U.S., Spain, and France. However, this ranking may shift in the future.
- Olive oil exports face several constraints, notably high logistical costs (especially transport), difficulties in accessing foreign buyers, multiple stakeholders involved in promotion, and the absence of a professional structure dedicated to coordinated promotional programs.
- Enhancing olive oil production and export requires improvements in quality, efficiency, and competitiveness across the value chain. This involves adopting better agricultural and harvesting techniques, timely and efficient transportation, well-organized olive mills, and robust traceability and certification systems to meet high-end market requirements.

Recommendations:

- Establish professional coordination among stakeholders in the Tunisian olive oil sector and clearly define their roles.
- Promote Tunisian olive oil varieties and qualities in international exhibitions and trade fairs to attract wider global interest.
- The government should provide comprehensive support for olive oil production, ensure quality monitoring, and facilitate financing through agreements with funding banks.
- According to reports from organizations such as the OECD and UNCTAD, participation in global value chains offers significant benefits to developing countries. Tunisia could strengthen its integration into agricultural global value chains, particularly olive oil, to achieve greater economic gains.
- To lead global olive oil exports, Tunisia must adopt realistic solutions to its export challenges, ensure proper implementation, and maintain continuous monitoring.
- Tunisia's experience in olive oil export is a highly successful model, as olive oil exports represent around 10% of its total exports, positively impacting the national economy. Other developing countries, particularly Arab nations, can emulate this experience by adapting products in which they possess a comparative advantage.

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