

## **Soft Drinks in Tunisia**

Market Direction | 2025-01-20 | 69 pages | Euromonitor

### **AVAILABLE LICENSES:**

- Single User Licence €2150.00
- Multiple User License (1 Site) €4300.00
- Multiple User License (Global) €6450.00

### **Report description:**

Soft drinks in Tunisia has experienced stagnation in 2024, with a noticeable volume decline across several subcategories. This downturn can be attributed to a combination of rising product prices, diminishing purchasing power among Tunisian consumers, and the broader economic crisis impacting the nation. These factors have significantly dampened demand for key categories such as carbonates, juices, and other soft drinks. Additionally, the influx of new entrants, particularly imported brands from...

Euromonitor International's Soft Drinks in Tunisia report offers a comprehensive guide to the size and shape of the market at a national level. It provides the latest retail sales data (2020-2024), allowing you to identify the sectors driving growth. It identifies the leading companies, the leading brands and offers strategic analysis of key factors influencing the market - be they legislative, distribution, packaging or pricing issues. Forecasts to 2029 illustrate how the market is set to change.

Product coverage: Asian Speciality Drinks, Bottled Water, Carbonates, Concentrates, Energy Drinks, Juice, RTD Coffee, RTD Tea, Sports Drinks.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

Why buy this report?

- \* Get a detailed picture of the Soft Drinks market;
- \* Pinpoint growth sectors and identify factors driving change;
- \* Understand the competitive environment, the market's major players and leading brands;
- \* Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop reliable information resources to help drive informed strategic planning.

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## Table of Contents:

Soft Drinks in Tunisia  
Euromonitor International  
January 2025

### List Of Contents And Tables

#### SOFT DRINKS IN TUNISIA

##### EXECUTIVE SUMMARY

Soft drinks in 2024: The big picture

2024 key trends

Competitive landscape

Retailing developments

Foodservice vs retail split

What next for soft drinks?

##### MARKET DATA

Table 1 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2019-2024

Table 2 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2019-2024

Table 3 Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2019-2024

Table 4 Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2019-2024

Table 5 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2024

Table 6 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2024

Table 7 Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2024

Table 8 Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2024

Table 9 Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2019-2024

Table 10 ☐Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2019-2024

Table 11 ☐Off-trade Sales of Soft Drinks by Category: Value 2019-2024

Table 12 ☐Off-trade Sales of Soft Drinks by Category: % Value Growth 2019-2024

Table 13 ☐Sales of Soft Drinks by Total Fountain On-trade: Volume 2019-2024

Table 14 ☐Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2019-2024

Table 15 ☐NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2024

Table 16 ☐LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2024

Table 17 ☐NBO Company Shares of Off-trade Soft Drinks: % Value 2020-2024

Table 18 ☐LBN Brand Shares of Off-trade Soft Drinks: % Value 2021-2024

Table 19 ☐Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2019-2024

Table 20 ☐Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2019-2024

Table 21 ☐Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2019-2024

Table 22 ☐Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2024

Table 23 ☐Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2024-2029

Table 24 ☐Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2024-2029

Table 25 ☐Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2024-2029

Table 26 ☐Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2024-2029

Table 27 ☐Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2024-2029

Table 28 ☐Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2024-2029

Table 29 ☐Forecast Off-trade Sales of Soft Drinks by Category: Value 2024-2029

Table 30 ☐Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2024-2029

Table 31 ☐Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2024-2029

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

Table 32 ☐Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 Research Sources

CARBONATES IN TUNISIA

KEY DATA FINDINGS

2024 DEVELOPMENTS

Impact of the Coca-Cola boycott on carbonates consumption

Rising investments in domestic carbonates brands

Resurgence of glass bottle packaging

PROSPECTS AND OPPORTUNITIES

Domestic brands poised for growth

Healthier alternatives to drive reduced sugar carbonates

Stagnation in overall carbonates demand

CATEGORY DATA

Table 33 Off-trade vs On-trade Sales of Carbonates: Volume 2019-2024

Table 34 Off-trade vs On-trade Sales of Carbonates: Value 2019-2024

Table 35 Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2019-2024

Table 36 Off-trade vs On-trade Sales of Carbonates: % Value Growth 2019-2024

Table 37 Off-trade Sales of Carbonates by Category: Volume 2019-2024

Table 38 Off-trade Sales of Carbonates by Category: Value 2019-2024

Table 39 Off-trade Sales of Carbonates by Category: % Volume Growth 2019-2024

Table 40 Off-trade Sales of Carbonates by Category: % Value Growth 2019-2024

Table 41 Sales of Carbonates by Total Fountain On-trade: Volume 2019-2024

Table 42 ☐Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2019-2024

Table 43 ☐NBO Company Shares of Off-trade Carbonates: % Volume 2020-2024

Table 44 ☐LBN Brand Shares of Off-trade Carbonates: % Volume 2021-2024

Table 45 ☐NBO Company Shares of Off-trade Carbonates: % Value 2020-2024

Table 46 ☐LBN Brand Shares of Off-trade Carbonates: % Value 2021-2024

Table 47 ☐Forecast Off-trade Sales of Carbonates by Category: Volume 2024-2029

Table 48 ☐Forecast Off-trade Sales of Carbonates by Category: Value 2024-2029

Table 49 ☐Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2024-2029

Table 50 ☐Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2024-2029

Table 51 ☐Forecast Sales of Carbonates by Total Fountain On-trade: Volume 2024-2029

Table 52 ☐Forecast Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2024-2029

JUICE IN TUNISIA

KEY DATA FINDINGS

2024 DEVELOPMENTS

Fresh packaged juice records an increase in demand

Health and wellness juice: A new trend

Small packaging supports juice sales in 2024

PROSPECTS AND OPPORTUNITIES

Innovation and new launches to drive growth

Modern grocery retailers as the key distribution channel

Delice expected to maintain leading role

CATEGORY DATA

Table 53 Off-trade Sales of Juice by Category: Volume 2019-2024

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

Table 54 Off-trade Sales of Juice by Category: Value 2019-2024  
Table 55 Off-trade Sales of Juice by Category: % Volume Growth 2019-2024  
Table 56 Off-trade Sales of Juice by Category: % Value Growth 2019-2024  
Table 57 NBO Company Shares of Off-trade Juice: % Volume 2020-2024  
Table 58 LBN Brand Shares of Off-trade Juice: % Volume 2021-2024  
Table 59 NBO Company Shares of Off-trade Juice: % Value 2020-2024  
Table 60 LBN Brand Shares of Off-trade Juice: % Value 2021-2024  
Table 61 Forecast Off-trade Sales of Juice by Category: Volume 2024-2029  
Table 62 □Forecast Off-trade Sales of Juice by Category: Value 2024-2029  
Table 63 □Forecast Off-trade Sales of Juice by Category: % Volume Growth 2024-2029  
Table 64 □Forecast Off-trade Sales of Juice by Category: % Value Growth 2024-2029

## BOTTLED WATER IN TUNISIA

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

A volume decline in 2023 and 2024  
Delice brand continues to gain market share  
A dynamic sector despite the crisis

### PROSPECTS AND OPPORTUNITIES

Performance linked to government decisions  
Growing sales of bottled water as consumers avoid tap water  
Price increases: The primary challenge ahead

### CATEGORY DATA

Table 65 Off-trade Sales of Bottled Water by Category: Volume 2019-2024  
Table 66 Off-trade Sales of Bottled Water by Category: Value 2019-2024  
Table 67 Off-trade Sales of Bottled Water by Category: % Volume Growth 2019-2024  
Table 68 Off-trade Sales of Bottled Water by Category: % Value Growth 2019-2024  
Table 69 NBO Company Shares of Off-trade Bottled Water: % Volume 2020-2024  
Table 70 LBN Brand Shares of Off-trade Bottled Water: % Volume 2021-2024  
Table 71 NBO Company Shares of Off-trade Bottled Water: % Value 2020-2024  
Table 72 LBN Brand Shares of Off-trade Bottled Water: % Value 2021-2024  
Table 73 Forecast Off-trade Sales of Bottled Water by Category: Volume 2024-2029  
Table 74 □Forecast Off-trade Sales of Bottled Water by Category: Value 2024-2029  
Table 75 □Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2024-2029  
Table 76 □Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2024-2029

## SPORTS DRINKS IN TUNISIA

### 2024 DEVELOPMENTS

Limited availability and near-zero visibility translate to negligible sales

### PROSPECTS AND OPPORTUNITIES

Gradual entry expected as sports nutrition becomes a more popular topic

## ENERGY DRINKS IN TUNISIA

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Decline in on-trade demand for energy drinks  
Economic crisis intensifies challenges for energy drinks  
Unchanged competitive landscape

### PROSPECTS AND OPPORTUNITIES

Energy drinks performance threatened by health concerns

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Traditional grocery retailers to maintain dominance

Advertising to drive future growth

#### CATEGORY DATA

Table 77 Off-trade Sales of Energy Drinks: Volume 2019-2024

Table 78 Off-trade Sales of Energy Drinks: Value 2019-2024

Table 79 Off-trade Sales of Energy Drinks: % Volume Growth 2019-2024

Table 80 Off-trade Sales of Energy Drinks: % Value Growth 2019-2024

Table 81 NBO Company Shares of Off-trade Energy Drinks: % Volume 2020-2024

Table 82 LBN Brand Shares of Off-trade Energy Drinks: % Volume 2021-2024

Table 83 NBO Company Shares of Off-trade Energy Drinks: % Value 2020-2024

Table 84 LBN Brand Shares of Off-trade Energy Drinks: % Value 2021-2024

Table 85 Forecast Off-trade Sales of Energy Drinks: Volume 2024-2029

Table 86 □Forecast Off-trade Sales of Energy Drinks: Value 2024-2029

Table 87 □Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2024-2029

Table 88 □Forecast Off-trade Sales of Energy Drinks: % Value Growth 2024-2029

#### CONCENTRATES IN TUNISIA

##### KEY DATA FINDINGS

##### 2024 DEVELOPMENTS

Declining demand for powder concentrates

Dokrem: A rising leader in the on-trade channel

Hazem: Sustained leadership amidst stagnation

##### PROSPECTS AND OPPORTUNITIES

Social media as a catalyst for liquid concentrates

Powder concentrates face imminent decline

Innovation as the key to liquid concentrates' success

#### CATEGORY DATA

##### Concentrates Conversions

Summary 2      Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

Table 89 Off-trade Sales of Concentrates (RTD) by Category: Volume 2019-2024

Table 90 Off-trade Sales of Concentrates by Category: Value 2019-2024

Table 91 Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2019-2024

Table 92 Off-trade Sales of Concentrates by Category: % Value Growth 2019-2024

Table 93 NBO Company Shares of Off-trade Concentrates (RTD): % Volume 2020-2024

Table 94 LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2021-2024

Table 95 NBO Company Shares of Off-trade Concentrates: % Value 2020-2024

Table 96 LBN Brand Shares of Off-trade Concentrates: % Value 2021-2024

Table 97 NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2024

Table 98 □LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2024

Table 99 □NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2020-2024

Table 100 □LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2024

Table 101 □Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2024-2029

Table 102 □Forecast Off-trade Sales of Concentrates by Category: Value 2024-2029

Table 103 □Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2024-2029

Table 104 □Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2024-2029

#### RTD TEA IN TUNISIA

##### KEY DATA FINDINGS

##### 2024 DEVELOPMENTS

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

The exit of international brands

The rise of smuggled RTD tea as a niche market

Aris Ice Tea: The sole domestic player

#### PROSPECTS AND OPPORTUNITIES

Curiosity for new flavours as a growth driver

On-trade channels as a growth opportunity

Health and wellness trends as key growth drivers

#### CATEGORY DATA

Table 105 Off-trade Sales of RTD Tea by Category: Volume 2019-2024

Table 106 Off-trade Sales of RTD Tea by Category: Value 2019-2024

Table 107 Off-trade Sales of RTD Tea by Category: % Volume Growth 2019-2024

Table 108 Off-trade Sales of RTD Tea by Category: % Value Growth 2019-2024

Table 109 NBO Company Shares of Off-trade RTD Tea: % Volume 2020-2024

Table 110 LBN Brand Shares of Off-trade RTD Tea: % Volume 2021-2024

Table 111 NBO Company Shares of Off-trade RTD Tea: % Value 2020-2024

Table 112 LBN Brand Shares of Off-trade RTD Tea: % Value 2021-2024

Table 113 Forecast Off-trade Sales of RTD Tea by Category: Volume 2024-2029

Table 114 □Forecast Off-trade Sales of RTD Tea by Category: Value 2024-2029

Table 115 □Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2024-2029

Table 116 □Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2024-2029

#### RTD COFFEE IN TUNISIA

#### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

A niche product area for higher-income consumers

Segafredo RTD coffee: A market exit

Starbucks RTD coffee available on-trade

#### PROSPECTS AND OPPORTUNITIES

Stagnation expected in the short term

RTD coffee offers potential for development of domestic brands

Prices to remain threat to expansion

#### CATEGORY DATA

Table 117 Off-trade Sales of RTD Coffee: Volume 2019-2024

Table 118 Off-trade Sales of RTD Coffee: Value 2019-2024

Table 119 Off-trade Sales of RTD Coffee: % Volume Growth 2019-2024

Table 120 Off-trade Sales of RTD Coffee: % Value Growth 2019-2024

Table 121 NBO Company Shares of Off-trade RTD Coffee: % Volume 2020-2024

Table 122 LBN Brand Shares of Off-trade RTD Coffee: % Volume 2021-2024

Table 123 NBO Company Shares of Off-trade RTD Coffee: % Value 2020-2024

Table 124 LBN Brand Shares of Off-trade RTD Coffee: % Value 2021-2024

Table 125 Forecast Off-trade Sales of RTD Coffee: Volume 2024-2029

Table 126 □Forecast Off-trade Sales of RTD Coffee: Value 2024-2029

Table 127 □Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2024-2029

Table 128 □Forecast Off-trade Sales of RTD Coffee: % Value Growth 2024-2029

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

## Soft Drinks in Tunisia

Market Direction | 2025-01-20 | 69 pages | Euromonitor

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

### ORDER FORM:

Select license	License	Price
	Single User Licence	€2150.00
	Multiple User License (1 Site)	€4300.00
	Multiple User License (Global)	€6450.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

☐ \*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2025-05-09"/>
		Signature	<input type="text"/>

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com