



# Soft Drinks in Tunisia

January 2024

Table of Contents

## Soft Drinks in Tunisia

### EXECUTIVE SUMMARY

Soft drinks in 2023: The big picture

2023 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 2018-2023

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2018-2023

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2018-2023

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2018-2023

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2023

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2023

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2023

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2023

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2018-2023

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2018-2023

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2018-2023

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2018-2023

Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2018-2023

Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2018-2023

Table 15 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2019-2023

Table 16 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2023

Table 17 - NBO Company Shares of Off-trade Soft Drinks: % Value 2019-2023

Table 18 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2020-2023

Table 19 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2018-2023

Table 20 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2018-2023

Table 21 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2018-2023

Table 22 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2023

Table 23 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2023-2028

Table 24 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2023-2028

Table 25 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2023-2028

Table 26 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2023-2028

Table 27 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2023-2028

Table 28 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2023-2028

Table 29 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2023-2028

Table 30 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2023-2028

Table 31 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2023-2028

Table 32 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2023-2028

### DISCLAIMER

### SOURCES

Summary 1 - Research Sources

## Bottled Water in Tunisia

### KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Value growth skyrockets for bottled water in 2023  
Innovative packaging solution from Délice  
Intense competition under the control of the Ministry of Health

## PROSPECTS AND OPPORTUNITIES

Délice to gather momentum  
New brands anticipated to enter the competition  
Promotion and economic packaging will support sales

## CATEGORY DATA

Table 33 - Off-trade Sales of Bottled Water by Category: Volume 2018-2023  
Table 34 - Off-trade Sales of Bottled Water by Category: Value 2018-2023  
Table 35 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2018-2023  
Table 36 - Off-trade Sales of Bottled Water by Category: % Value Growth 2018-2023  
Table 37 - NBO Company Shares of Off-trade Bottled Water: % Volume 2019-2023  
Table 38 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2020-2023  
Table 39 - NBO Company Shares of Off-trade Bottled Water: % Value 2019-2023  
Table 40 - LBN Brand Shares of Off-trade Bottled Water: % Value 2020-2023  
Table 41 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2023-2028  
Table 42 - Forecast Off-trade Sales of Bottled Water by Category: Value 2023-2028  
Table 43 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2023-2028  
Table 44 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2023-2028

## Carbonates in Tunisia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Sugar crisis continues through 2023, supporting sales in low-sugar options  
Société des Boisson du Cap Bon sells wells in face of economic woes  
Leading player loses volume share in 2023

### PROSPECTS AND OPPORTUNITIES

Sugar shortage will continue to impact category growth  
Rising prices and shrinking packages  
Cola Carbonates anticipated to see new entrant

## CATEGORY DATA

Table 45 - Off-trade vs On-trade Sales of Carbonates: Volume 2018-2023  
Table 46 - Off-trade vs On-trade Sales of Carbonates: Value 2018-2023  
Table 47 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2018-2023  
Table 48 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2018-2023  
Table 49 - Off-trade Sales of Carbonates by Category: Volume 2018-2023  
Table 50 - Off-trade Sales of Carbonates by Category: Value 2018-2023  
Table 51 - Off-trade Sales of Carbonates by Category: % Volume Growth 2018-2023  
Table 52 - Off-trade Sales of Carbonates by Category: % Value Growth 2018-2023  
Table 53 - Sales of Carbonates by Total Fountain On-trade: Volume 2018-2023  
Table 54 - Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2018-2023  
Table 55 - NBO Company Shares of Off-trade Carbonates: % Volume 2019-2023  
Table 56 - LBN Brand Shares of Off-trade Carbonates: % Volume 2020-2023  
Table 57 - NBO Company Shares of Off-trade Carbonates: % Value 2019-2023  
Table 58 - LBN Brand Shares of Off-trade Carbonates: % Value 2020-2023  
Table 59 - Forecast Off-trade Sales of Carbonates by Category: Volume 2023-2028  
Table 60 - Forecast Off-trade Sales of Carbonates by Category: Value 2023-2028

Table 61 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2023-2028

Table 62 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2023-2028

Table 63 - Forecast Sales of Carbonates by Total Fountain On-trade: Volume 2023-2028

Table 64 - Forecast Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2023-2028

## Concentrates in Tunisia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Jouto enters powder concentrates while domestic players struggle in liquid concentrates

On-Trade channel supports sales of liquid concentrates

Modernisation and societal shifts impact sales of powder concentrates

#### PROSPECTS AND OPPORTUNITIES

On-Trade sales to remain key to growth though powder concentrates will continue to fall

Lack of international players in powder concentrates

Hazem will maintain leadership of liquid concentrates

#### CATEGORY DATA

Concentrates Conversions

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

Table 65 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2018-2023

Table 66 - Off-trade Sales of Concentrates by Category: Value 2018-2023

Table 67 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2018-2023

Table 68 - Off-trade Sales of Concentrates by Category: % Value Growth 2018-2023

Table 69 - NBO Company Shares of Off-trade Concentrates (RTD): % Volume 2019-2023

Table 70 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2020-2023

Table 71 - NBO Company Shares of Off-trade Concentrates: % Value 2019-2023

Table 72 - LBN Brand Shares of Off-trade Concentrates: % Value 2020-2023

Table 73 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2019-2023

Table 74 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2023

Table 75 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2019-2023

Table 76 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2020-2023

Table 77 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2023-2028

Table 78 - Forecast Off-trade Sales of Concentrates by Category: Value 2023-2028

Table 79 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2023-2028

Table 80 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2023-2028

## Juice in Tunisia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Juice in Tunisia proves attractive to international players

Informal market constrains category growth while providing home to 100% juice

Domestic players maintain leadership as growth remains constrained

#### PROSPECTS AND OPPORTUNITIES

Children set to be biggest juice consumers, favouring small pack formats

Coconut and other plant waters will be developed over the next period

Health trends to drive demand in juice

#### CATEGORY DATA

- Table 81 - Off-trade Sales of Juice by Category: Volume 2018-2023
- Table 82 - Off-trade Sales of Juice by Category: Value 2018-2023
- Table 83 - Off-trade Sales of Juice by Category: % Volume Growth 2018-2023
- Table 84 - Off-trade Sales of Juice by Category: % Value Growth 2018-2023
- Table 85 - NBO Company Shares of Off-trade Juice: % Volume 2019-2023
- Table 86 - LBN Brand Shares of Off-trade Juice: % Volume 2020-2023
- Table 87 - NBO Company Shares of Off-trade Juice: % Value 2019-2023
- Table 88 - LBN Brand Shares of Off-trade Juice: % Value 2020-2023
- Table 89 - Forecast Off-trade Sales of Juice by Category: Volume 2023-2028
- Table 90 - Forecast Off-trade Sales of Juice by Category: Value 2023-2028
- Table 91 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2023-2028
- Table 92 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2023-2028

## RTD Tea in Tunisia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

- Aris Ice Tea represents first local RTD in Tunisia
- RTD tea makes a splash on-trade while smuggling continues
- Lack of promotion stifles progress

#### PROSPECTS AND OPPORTUNITIES

- Prices set to remain out of reach for majority of Tunisian consumers
- Anticipated shift in distribution
- Health and wellness trends as key growth drivers

#### CATEGORY DATA

- Table 93 - Off-trade Sales of RTD Tea by Category: Volume 2018-2023
- Table 94 - Off-trade Sales of RTD Tea by Category: Value 2018-2023
- Table 95 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2018-2023
- Table 96 - Off-trade Sales of RTD Tea by Category: % Value Growth 2018-2023
- Table 97 - NBO Company Shares of Off-trade RTD Tea: % Volume 2019-2023
- Table 98 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2020-2023
- Table 99 - NBO Company Shares of Off-trade RTD Tea: % Value 2019-2023
- Table 100 - LBN Brand Shares of Off-trade RTD Tea: % Value 2020-2023
- Table 101 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2023-2028
- Table 102 - Forecast Off-trade Sales of RTD Tea by Category: Value 2023-2028
- Table 103 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2023-2028
- Table 104 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2023-2028

## Energy Drinks in Tunisia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

- Off-Trade volume stagnation in 2023, while Hell enters the fray
- Monster smuggled in from Libya
- Vodka consumption supports the on-trade volume growth

#### PROSPECTS AND OPPORTUNITIES

- Volume decrease anticipated
- Younger consumers represent the target for energy drinks while the parallel market will continue to threaten growth
- International brands will maintain dominance, though domestic development offers potential for growth

## CATEGORY DATA

Table 105 - Off-trade Sales of Energy Drinks: Volume 2018-2023

Table 106 - Off-trade Sales of Energy Drinks: Value 2018-2023

Table 107 - Off-trade Sales of Energy Drinks: % Volume Growth 2018-2023

Table 108 - Off-trade Sales of Energy Drinks: % Value Growth 2018-2023

Table 109 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2019-2023

Table 110 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2020-2023

Table 111 - NBO Company Shares of Off-trade Energy Drinks: % Value 2019-2023

Table 112 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2020-2023

Table 113 - Forecast Off-trade Sales of Energy Drinks: Volume 2023-2028

Table 114 - Forecast Off-trade Sales of Energy Drinks: Value 2023-2028

Table 115 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2023-2028

Table 116 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2023-2028

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/soft-drinks-in-tunisia/report](http://www.euromonitor.com/soft-drinks-in-tunisia/report).