



Dairy Products and Alternatives in Tunisia

August 2024

Table of Contents

Dairy Products and Alternatives in Tunisia

EXECUTIVE SUMMARY

Dairy products and alternatives in 2024: The big picture

Key trends in 2024

Competitive Landscape

Channel developments

What next for dairy products and alternatives?

MARKET DATA

Table 1 - Sales of Dairy Products and Alternatives by Category: Value 2019-2024

Table 2 - Sales of Dairy Products and Alternatives by Category: % Value Growth 2019-2024

Table 3 - NBO Company Shares of Dairy Products and Alternatives: % Value 2020-2024

Table 4 - LBN Brand Shares of Dairy Products and Alternatives: % Value 2021-2024

Table 5 - Penetration of Private Label by Category: % Value 2019-2024

Table 6 - Distribution of Dairy Products and Alternatives by Format: % Value 2019-2024

Table 7 - Forecast Sales of Dairy Products and Alternatives by Category: Value 2024-2029

Table 8 - Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby Food in Tunisia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Price pressure and competition from smuggled products limits demand for baby food and milk formula

Milk formula remains dominated by two brands

Economic pressures continue to limit demand for dried baby food

PROSPECTS AND OPPORTUNITIES

Challenging future ahead for baby food

New products are expected in other baby food sector

Mixed outlook for local manufacturers

CATEGORY DATA

Table 9 - Sales of Baby Food by Category: Volume 2019-2024

Table 10 - Sales of Baby Food by Category: Value 2019-2024

Table 11 - Sales of Baby Food by Category: % Volume Growth 2019-2024

Table 12 - Sales of Baby Food by Category: % Value Growth 2019-2024

Table 13 - NBO Company Shares of Baby Food: % Value 2020-2024

Table 14 - LBN Brand Shares of Baby Food: % Value 2021-2024

Table 15 - Distribution of Baby Food by Format: % Value 2019-2024

Table 16 - Forecast Sales of Baby Food by Category: Volume 2024-2029

Table 17 - Forecast Sales of Baby Food by Category: Value 2024-2029

Table 18 - Forecast Sales of Baby Food by Category: % Volume Growth 2024-2029

Table 19 - Forecast Sales of Baby Food by Category: % Value Growth 2024-2029

Butter and Spreads in Tunisia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Butter bounces back in 2024 as the government finds solutions to milk shortages

Butter and spreads prices continue rise in 2024

Competitive landscape remains highly consolidated across butter and spreads

PROSPECTS AND OPPORTUNITIES

Butter set for full recovery thanks to government support and strong demand

Délice Beurre set to remain on top

Social media introducing Tunisians to a more diverse range of dishes and cuisines which could benefit sales of butter and spreads

CATEGORY DATA

Table 20 - Sales of Butter and Spreads by Category: Volume 2019-2024

Table 21 - Sales of Butter and Spreads by Category: Value 2019-2024

Table 22 - Sales of Butter and Spreads by Category: % Volume Growth 2019-2024

Table 23 - Sales of Butter and Spreads by Category: % Value Growth 2019-2024

Table 24 - NBO Company Shares of Butter and Spreads: % Value 2020-2024

Table 25 - LBN Brand Shares of Butter and Spreads: % Value 2021-2024

Table 26 - Distribution of Butter and Spreads by Format: % Value 2019-2024

Table 27 - Forecast Sales of Butter and Spreads by Category: Volume 2024-2029

Table 28 - Forecast Sales of Butter and Spreads by Category: Value 2024-2029

Table 29 - Forecast Sales of Butter and Spreads by Category: % Volume Growth 2024-2029

Table 30 - Forecast Sales of Butter and Spreads by Category: % Value Growth 2024-2029

Cheese in Tunisia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Foodservice sales under pressure due to competition from cheaper products

Rising prices also impact retail sales of cheese in 2024

Soft cheese remains a key ingredient in the Tunisian diet

PROSPECTS AND OPPORTUNITIES

Illicit trade will remain the main threat to the growth and development of cheese

Modern grocery retailers could be key to the growth of cheese

Spreadable cheese likely to continue benefiting from its more affordable pricing

CATEGORY DATA

Table 31 - Sales of Cheese by Category: Volume 2019-2024

Table 32 - Sales of Cheese by Category: Value 2019-2024

Table 33 - Sales of Cheese by Category: % Volume Growth 2019-2024

Table 34 - Sales of Cheese by Category: % Value Growth 2019-2024

Table 35 - Sales of Spreadable Cheese by Type: % Value 2019-2024

Table 36 - Sales of Soft Cheese by Type: % Value 2019-2024

Table 37 - Sales of Hard Cheese by Type: % Value 2019-2024

Table 38 - NBO Company Shares of Cheese: % Value 2020-2024

Table 39 - LBN Brand Shares of Cheese: % Value 2021-2024

Table 40 - Distribution of Cheese by Format: % Value 2019-2024

Table 41 - Forecast Sales of Cheese by Category: Volume 2024-2029

Table 42 - Forecast Sales of Cheese by Category: Value 2024-2029

Table 43 - Forecast Sales of Cheese by Category: % Volume Growth 2024-2029

Table 44 - Forecast Sales of Cheese by Category: % Value Growth 2024-2029

Drinking Milk Products in Tunisia

KEY DATA FINDINGS

2024 DEVELOPMENTS

STIAL increases its dominance in flavoured milk drinks

Semi skimmed shelf stable milk seeing strong recovery in 2024 as supply shortages are addressed

STIAL launches new lactose free milk range as wealthier consumers look for healthier options

PROSPECTS AND OPPORTUNITIES

New government strategies should support the full recovery of semi skimmed shelf stable milk

Flavoured milk drinks with fruit juice showing potential thanks to healthy image

Domestic players to retain their dominance over drinking milk products

CATEGORY DATA

Table 45 - Sales of Drinking Milk Products by Category: Volume 2019-2024

Table 46 - Sales of Drinking Milk Products by Category: Value 2019-2024

Table 47 - Sales of Drinking Milk Products by Category: % Volume Growth 2019-2024

Table 48 - Sales of Drinking Milk Products by Category: % Value Growth 2019-2024

Table 49 - NBO Company Shares of Drinking Milk Products: % Value 2020-2024

Table 50 - LBN Brand Shares of Drinking Milk Products: % Value 2021-2024

Table 51 - Distribution of Drinking Milk Products by Format: % Value 2019-2024

Table 52 - Forecast Sales of Drinking Milk Products by Category: Volume 2024-2029

Table 53 - Forecast Sales of Drinking Milk Products by Category: Value 2024-2029

Table 54 - Forecast Sales of Drinking Milk Products by Category: % Volume Growth 2024-2029

Table 55 - Forecast Sales of Drinking Milk Products by Category: % Value Growth 2024-2029

Yoghurt and Sour Milk Products in Tunisia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Mixed performances being seen in 2024 with flavoured yoghurt coming out top

Délice driving innovation in sour milk products

Price increases affecting consumer purchasing behaviour

PROSPECTS AND OPPORTUNITIES

Price increases and inflation likely to remain the key obstacles to stronger growth

Product with smaller sizes packaging are the opportunity over the next period

Flavoured yoghurt set to benefit from its positioning as an affordable indulgence

CATEGORY DATA

Table 56 - Sales of Yoghurt and Sour Milk Products by Category: Volume 2019-2024

Table 57 - Sales of Yoghurt and Sour Milk Products by Category: Value 2019-2024

Table 58 - Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2019-2024

Table 59 - Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2019-2024

Table 60 - Sales of Flavoured Yoghurt by Flavour: Rankings 2019-2024

Table 61 - NBO Company Shares of Yoghurt and Sour Milk Products: % Value 2020-2024

Table 62 - LBN Brand Shares of Yoghurt and Sour Milk Products: % Value 2021-2024

Table 63 - Distribution of Yoghurt and Sour Milk Products by Format: % Value 2019-2024

Table 64 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Volume 2024-2029

Table 65 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Value 2024-2029

Table 66 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2024-2029

Table 67 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2024-2029

Other Dairy in Tunisia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Inflation and price rises put pressure on demand for other dairy products
Plain fromage frais and quark thriving while cream goes sour due to supply shortages
Vanoise storms into the lead in condensed milk as Nestlé struggles

PROSPECTS AND OPPORTUNITIES

Economic pressures likely to influence market demand for other dairy products
Cream is the subcategory expected to perform the best and Condensed Milk is the worst over the forecast period
E-commerce and digital marketing could open up new opportunities for other dairy

CATEGORY DATA

- Table 68 - Sales of Other Dairy by Category: Volume 2019-2024
- Table 69 - Sales of Other Dairy by Category: Value 2019-2024
- Table 70 - Sales of Other Dairy by Category: % Volume Growth 2019-2024
- Table 71 - Sales of Other Dairy by Category: % Value Growth 2019-2024
- Table 72 - Sales of Cream by Type: % Value 2019-2024
- Table 73 - NBO Company Shares of Other Dairy: % Value 2020-2024
- Table 74 - LBN Brand Shares of Other Dairy: % Value 2021-2024
- Table 75 - Distribution of Other Dairy by Format: % Value 2019-2024
- Table 76 - Forecast Sales of Other Dairy by Category: Volume 2024-2029
- Table 77 - Forecast Sales of Other Dairy by Category: Value 2024-2029
- Table 78 - Forecast Sales of Other Dairy by Category: % Volume Growth 2024-2029
- Table 79 - Forecast Sales of Other Dairy by Category: % Value Growth 2024-2029

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/dairy-products-and-alternatives-in-tunisia/report.