



Soft Drinks in Tunisia

December 2025

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Soft Drinks in Tunisia

EXECUTIVE SUMMARY

Rebound of bottled water supports overall growth of soft drinks

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Players intensify promotional activity to drive demand

Coca-Cola boycott creates opportunities for local players

Entry of several imported brands in 2025

WHAT'S NEXT?

Continued strong demand for bottled water

Government involvement and legislative developments set to shape the market

COMPETITIVE LANDSCAPE

La Société des Stations Thermales et des Eaux Minérales leads

Rouiba resumes operations in 2025

CHANNELS

Small local grocers benefit from their extensive network

Discounter Aziza enjoys strong year-on-year growth

Foodservice vs retail split

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Bottled water rebounds in 2025

INDUSTRY PERFORMANCE

Strong recovery following two years of decline

Dynamic still natural mineral bottled water

WHAT'S NEXT?

Poor quality of tap water will continue to drive demand for bottled water

Limited innovation expected

Legislative developments essential for future growth

COMPETITIVE LANDSCAPE

Société des Stations Thermales et des Eaux Minérales enjoys a strong reputation

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INDUSTRY PERFORMANCE

Impact of rising health consciousness, price increases and social media
Cola boycott and innovation support non-cola carbonates' performance

WHAT'S NEXT?

Declining purchasing power and shift toward healthier alternatives limits volume sales
Non-cola carbonates will continue to benefit from new products and flavours
Rising health awareness set to dampen sales

COMPETITIVE LANDSCAPE

Société Tunisienne de Boissons Gazeuses leads despite share loss
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KEY DATA FINDINGS

2025 DEVELOPMENTS

Impact of shifting consumer preferences

INDUSTRY PERFORMANCE

Waning demand for powder concentrates
Liquid concentrates benefit from on-trade demand

WHAT'S NEXT?

On-trade outlets play a key role in driving growth of liquid concentrates

Product innovation to support sales

Market lacks any meaningful health and wellness initiatives

COMPETITIVE LANDSCAPE

Société Hazem offers popular flavours and affordable prices

FK MONIN Tunisia performs well on-trade, launching a wide range of liquid concentrates

CHANNELS

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Discouter Aziza continues to gain popularity

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[Juice in Tunisia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Slowed growth, although juice remains highly dynamic in terms of innovation and new launches

INDUSTRY PERFORMANCE

Slowed growth with stagnant demand among children

Juice drinks (up to 24% juice) provide an accessible, value-for-money option

WHAT'S NEXT?

Growth supported by rising penetration of modern grocery retailers and urbanisation

Appealing packaging and innovation will strengthen Société des Boissons du Cap Bon's leadership

Health and wellness trend to remain a key driver of juice sales

COMPETITIVE LANDSCAPE

Leading Société des Boissons du Cap Bon benefits from strong brand awareness

Strong growth of Société Nouvelle des Boissons Gazeuses with portfolio expansion and active marketing

CHANNELS

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RTD Coffee in Tunisia

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INDUSTRY PERFORMANCE

RTD remains a niche product for higher-income consumers

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WHAT'S NEXT?

Downward trend set to continue

Continued focus on basic products

Development of healthier options unlikely

COMPETITIVE LANDSCAPE

Starbucks is the only active brand

CHANNELS

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RTD Tea in Tunisia

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2025 DEVELOPMENTS

RTD remains a niche category in 2025

INDUSTRY PERFORMANCE

Low consumer awareness and interest impact RTD tea

WHAT'S NEXT?

Limited growth expected

Limited impact of health and wellness

On-trade outlets represent an untapped opportunity for RTD tea

COMPETITIVE LANDSCAPE

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Supermarkets dominate sales

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Declining demand in 2025

INDUSTRY PERFORMANCE

Energy drinks continues to face significant challenges

WHAT'S NEXT?

Return to growth from 2027 with gradual economic improvements

Innovation to maintain consumer interest

Efforts to curb smuggled energy drinks having a positive impact

COMPETITIVE LANDSCAPE

Groupe Bayahi, with Red Bull, dominates
Société Shark Tunisie strengthens its position

CHANNELS

Small local grocers lead with their widespread presence in both rural and urban areas
Food/drink/tobacco specialists offer a broad assortment of imported products

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[Sports Drinks in Tunisia](#)

2025 DEVELOPMENTS

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