



# Carbonates in Tunisia

December 2025

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## Carbonates in Tunisia - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Carbonates faces a challenging environment

#### 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

Coca-Cola boycott benefits Société des Boissons du Cap Bon

#### CHANNELS

Small local grocers play a central role in the distribution of carbonates

Aziza gains ground with store openings and promotions

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Rebound of bottled water supports overall growth of soft drinks

#### KEY DATA FINDINGS

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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  
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