



Euromonitor  
International

# RTD Coffee in Tunisia

December 2025

Table of Contents

## RTD Coffee in Tunisia - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Weak demand due to high prices, low awareness, and restricted distribution

#### INDUSTRY PERFORMANCE

RTD remains a niche product for higher-income consumers

Segafredo RTD coffee: A market exit

#### 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

Hypermarkets lead, targeting upper-income consumers

Expansion of retail e-commerce, offering niche products such as RTD coffee

#### CATEGORY DATA

Table 1 - Off-trade Sales of RTD Coffee: Volume 2020-2025

Table 2 - Off-trade Sales of RTD Coffee: Value 2020-2025

Table 3 - Off-trade Sales of RTD Coffee: % Volume Growth 2020-2025

Table 4 - Off-trade Sales of RTD Coffee: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2021-2025

Table 6 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2022-2025

Table 7 - NBO Company Shares of Off-trade RTD Coffee: % Value 2021-2025

Table 8 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2022-2025

Table 9 - Forecast Off-trade Sales of RTD Coffee: Volume 2025-2030

Table 10 - Forecast Off-trade Sales of RTD Coffee: Value 2025-2030

Table 11 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2025-2030

Table 12 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2025-2030

#### COUNTRY REPORTS DISCLAIMER

## Soft Drinks in Tunisia - Industry Overview

### 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

## MARKET DATA

Table 13 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025  
Table 14 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025  
Table 15 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025  
Table 16 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025  
Table 17 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025  
Table 18 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025  
Table 19 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025  
Table 20 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025  
Table 21 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025  
Table 22 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025  
Table 23 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025  
Table 24 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025  
Table 25 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025  
Table 26 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025  
Table 27 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025  
Table 28 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025  
Table 29 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025  
Table 30 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025  
Table 31 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025  
Table 32 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025  
Table 33 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025  
Table 34 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025  
Table 35 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030  
Table 36 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030  
Table 37 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030  
Table 38 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030  
Table 39 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030  
Table 40 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030  
Table 41 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030  
Table 42 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030  
Table 43 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030  
Table 44 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

## SOURCES

Summary 1 - Research Sources

### 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/rtd-coffee-in-tunisia/report](http://www.euromonitor.com/rtd-coffee-in-tunisia/report).