



Concentrates in Tunisia

December 2025

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Concentrates in Tunisia - Category analysis

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

Extensive network of small local grocers ensure their distribution lead

Discounter Aziza continues to gain popularity

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Soft Drinks in Tunisia - Industry Overview

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Rebound of bottled water supports overall growth of soft drinks

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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 Thermale et des Eaux Minérales leads

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Small local grocers benefit from their extensive network

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