



Euromonitor  
International

# 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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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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