



Euromonitor  
International

# Snacks in Tunisia

July 2024

Table of Contents

EXECUTIVE SUMMARY

- Snacks in 2024: The big picture
- Key trends in 2024
- Competitive landscape
- Channel developments
- What next for snacks?

MARKET DATA

- Table 1 - Sales of Snacks by Category: Volume 2019-2024
- Table 2 - Sales of Snacks by Category: Value 2019-2024
- Table 3 - Sales of Snacks by Category: % Volume Growth 2019-2024
- Table 4 - Sales of Snacks by Category: % Value Growth 2019-2024
- Table 5 - NBO Company Shares of Snacks: % Value 2020-2024
- Table 6 - LBN Brand Shares of Snacks: % Value 2021-2024
- Table 7 - Penetration of Private Label by Category: % Value 2019-2024
- Table 8 - Distribution of Snacks by Format: % Value 2019-2024
- Table 9 - Forecast Sales of Snacks by Category: Volume 2024-2029
- Table 10 - Forecast Sales of Snacks by Category: Value 2024-2029
- Table 11 - Forecast Sales of Snacks by Category: % Volume Growth 2024-2029
- Table 12 - Forecast Sales of Snacks by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

- Summary 1 - Research Sources

Chocolate Confectionery in Tunisia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Higher prices foster search for cheaper options
- Countlines rides price advantage to perform well
- New brands enrich the chocolate confectionery offer in Tunisia

PROSPECTS AND OPPORTUNITIES

- Economic threats to constrain demand growth
- Chocolate confectionery for special occasions to create growth opportunities
- Company investments to push tablets and countlines

CATEGORY DATA

- Table 13 - Sales of Chocolate Confectionery by Category: Volume 2019-2024
- Table 14 - Sales of Chocolate Confectionery by Category: Value 2019-2024
- Table 15 - Sales of Chocolate Confectionery by Category: % Volume Growth 2019-2024
- Table 16 - Sales of Chocolate Confectionery by Category: % Value Growth 2019-2024
- Table 17 - Sales of Chocolate Tablets by Type: % Value 2019-2024
- Table 18 - NBO Company Shares of Chocolate Confectionery: % Value 2020-2024
- Table 19 - LBN Brand Shares of Chocolate Confectionery: % Value 2021-2024
- Table 20 - Distribution of Chocolate Confectionery by Format: % Value 2019-2024
- Table 21 - Forecast Sales of Chocolate Confectionery by Category: Volume 2024-2029
- Table 22 - Forecast Sales of Chocolate Confectionery by Category: Value 2024-2029
- Table 23 - Forecast Sales of Chocolate Confectionery by Category: % Volume Growth 2024-2029

Table 24 - Forecast Sales of Chocolate Confectionery by Category: % Value Growth 2024-2029

Gum in Tunisia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Gum demand shows resilience in the face of higher prices  
Chewing gum and bubble gum see similar growth trajectories  
Parallel trade hampers legal sales but innovation remains a driver

PROSPECTS AND OPPORTUNITIES

A robust performance is anticipated from gum  
Gum continues to face strong challenges  
New flavours, sugar-free variants and packaging offer growth opportunities

CATEGORY DATA

- Table 25 - Sales of Gum by Category: Volume 2019-2024
- Table 26 - Sales of Gum by Category: Value 2019-2024
- Table 27 - Sales of Gum by Category: % Volume Growth 2019-2024
- Table 28 - Sales of Gum by Category: % Value Growth 2019-2024
- Table 29 - Sales of Gum by Flavour: Rankings 2019-2024
- Table 30 - NBO Company Shares of Gum: % Value 2020-2024
- Table 31 - LBN Brand Shares of Gum: % Value 2021-2024
- Table 32 - Distribution of Gum by Format: % Value 2019-2024
- Table 33 - Forecast Sales of Gum by Category: Volume 2024-2029
- Table 34 - Forecast Sales of Gum by Category: Value 2024-2029
- Table 35 - Forecast Sales of Gum by Category: % Volume Growth 2024-2029
- Table 36 - Forecast Sales of Gum by Category: % Value Growth 2024-2029

Sugar Confectionery in Tunisia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sugar confectionery shows resilience in the face of price increases  
Medicated confectionery continues to move towards the mainstream  
Domestic and international players vie for a competitive edge

PROSPECTS AND OPPORTUNITIES

Economic pressures to continue to weigh upon sugar confectionery  
Economy and health and wellness products to gain momentum  
Medicated confectionery to continue to gain traction as an alternative to traditional medications

CATEGORY DATA

- Summary 2 - Other Sugar Confectionery by Product Type: 2024
- Table 37 - Sales of Sugar Confectionery by Category: Volume 2019-2024
- Table 38 - Sales of Sugar Confectionery by Category: Value 2019-2024
- Table 39 - Sales of Sugar Confectionery by Category: % Volume Growth 2019-2024
- Table 40 - Sales of Sugar Confectionery by Category: % Value Growth 2019-2024
- Table 41 - Sales of Pastilles, Gummies, Jellies and Chews by Type: % Value 2019-2024
- Table 42 - NBO Company Shares of Sugar Confectionery: % Value 2020-2024
- Table 43 - LBN Brand Shares of Sugar Confectionery: % Value 2021-2024
- Table 44 - Distribution of Sugar Confectionery by Format: % Value 2019-2024

Table 45 - Forecast Sales of Sugar Confectionery by Category: Volume 2024-2029

Table 46 - Forecast Sales of Sugar Confectionery by Category: Value 2024-2029

Table 47 - Forecast Sales of Sugar Confectionery by Category: % Volume Growth 2024-2029

Table 48 - Forecast Sales of Sugar Confectionery by Category: % Value Growth 2024-2029

Ice Cream in Tunisia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Price rises constrain consumption
- Parad'ice leads the charge of unpackaged ice cream
- First low-calorie ice cream appears in Tunisia

PROSPECTS AND OPPORTUNITIES

- Innovation and wider distribution to help mitigate price increases
- Innovation, packaging and pricing strategies to open the way to growth opportunities
- Proliferation of ice cream specialists to boost unpackaged ice cream

CATEGORY DATA

Table 49 - Sales of Ice Cream by Category: Volume 2019-2024

Table 50 - Sales of Ice Cream by Category: Value 2019-2024

Table 51 - Sales of Ice Cream by Category: % Volume Growth 2019-2024

Table 52 - Sales of Ice Cream by Category: % Value Growth 2019-2024

Table 53 - Sales of Ice Cream by Leading Flavours: Rankings 2019-2024

Table 54 - Sales of Impulse Ice Cream by Format: % Value 2019-2024

Table 55 - NBO Company Shares of Ice Cream: % Value 2020-2024

Table 56 - LBN Brand Shares of Ice Cream: % Value 2021-2024

Table 57 - NBO Company Shares of Impulse Ice Cream: % Value 2020-2024

Table 58 - LBN Brand Shares of Impulse Ice Cream: % Value 2021-2024

Table 59 - NBO Company Shares of Take-home Ice Cream: % Value 2020-2024

Table 60 - LBN Brand Shares of Take-home Ice Cream: % Value 2021-2024

Table 61 - Distribution of Ice Cream by Format: % Value 2019-2024

Table 62 - Forecast Sales of Ice Cream by Category: Volume 2024-2029

Table 63 - Forecast Sales of Ice Cream by Category: Value 2024-2029

Table 64 - Forecast Sales of Ice Cream by Category: % Volume Growth 2024-2029

Table 65 - Forecast Sales of Ice Cream by Category: % Value Growth 2024-2029

Savoury Snacks in Tunisia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- High price-sensitivity fosters the introduction of smaller packs to stimulate demand
- Wide appeal of tortilla chips while the unpackaged format cannibalises packaged nuts
- Domestic brands and private label increase the offer and competition in savoury snacks

PROSPECTS AND OPPORTUNITIES

- Players seek solutions to navigate pricing challenges
- Private label to gain traction
- Wide availability, small packs and a large potential consumer base to see tortilla chips post the fastest retail volume CAGR

CATEGORY DATA

Table 66 - Sales of Savoury Snacks by Category: Volume 2019-2024

Table 67 - Sales of Savoury Snacks by Category: Value 2019-2024

Table 68 - Sales of Savoury Snacks by Category: % Volume Growth 2019-2024

Table 69 - Sales of Savoury Snacks by Category: % Value Growth 2019-2024

Table 70 - NBO Company Shares of Savoury Snacks: % Value 2020-2024

Table 71 - LBN Brand Shares of Savoury Snacks: % Value 2021-2024

Table 72 - Distribution of Savoury Snacks by Format: % Value 2019-2024

Table 73 - Forecast Sales of Savoury Snacks by Category: Volume 2024-2029

Table 74 - Forecast Sales of Savoury Snacks by Category: Value 2024-2029

Table 75 - Forecast Sales of Savoury Snacks by Category: % Volume Growth 2024-2029

Table 76 - Forecast Sales of Savoury Snacks by Category: % Value Growth 2024-2029

Sweet Biscuits, Snack Bars and Fruit Snacks in Tunisia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Less sensitivity to price rises
- Newer categories continue to add dynamism
- Healthier options and new entries diversify and intensify the competitive landscape

PROSPECTS AND OPPORTUNITIES

- Availability and cost represent key challenges
- New entries and healthier options to create a buzz
- Growing investment to support the development of snack bars and fruit snacks

CATEGORY DATA

Table 77 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2019-2024

Table 78 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2019-2024

Table 79 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2019-2024

Table 80 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2019-2024

Table 81 - NBO Company Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2020-2024

Table 82 - LBN Brand Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2021-2024

Table 83 - NBO Company Shares of Sweet Biscuits: % Value 2020-2024

Table 84 - LBN Brand Shares of Sweet Biscuits: % Value 2021-2024

Table 85 - NBO Company Shares of Snack Bars: % Value 2020-2024

Table 86 - LBN Brand Shares of Snack Bars: % Value 2021-2024

Table 87 - NBO Company Shares of Fruit Snacks: % Value 2020-2024

Table 88 - LBN Brand Shares of Fruit Snacks: % Value 2021-2024

Table 89 - Distribution of Sweet Biscuits, Snack Bars and Fruit Snacks by Format: % Value 2019-2024

Table 90 - Distribution of Sweet Biscuits by Format: % Value 2019-2024

Table 91 - Distribution of Snack Bars by Format: % Value 2019-2024

Table 92 - Distribution of Fruit Snacks by Format: % Value 2019-2024

Table 93 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2024-2029

Table 94 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2024-2029

Table 95 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2024-2029

Table 96 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2024-2029

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/snacks-in-tunisia/report](http://www.euromonitor.com/snacks-in-tunisia/report).