



Euromonitor
International

Soft Drinks in Tunisia

December 2025

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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

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Foodservice vs retail split

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2025 DEVELOPMENTS

Bottled water rebounds in 2025

INDUSTRY PERFORMANCE

Strong recovery following two years of decline

Dynamic still natural mineral bottled water

WHAT'S NEXT?

Poor quality of tap water will continue to drive demand for bottled water

Limited innovation expected

Legislative developments essential for future growth

COMPETITIVE LANDSCAPE

Société des Stations Thermales et des Eaux Minérales enjoys a strong reputation

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[Carbonates in Tunisia](#)

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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

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[Concentrates in Tunisia](#)

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

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[Juice in Tunisia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

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INDUSTRY PERFORMANCE

Slowed growth with stagnant demand among children

Juice drinks (up to 24% juice) provide an accessible, value-for-money option

WHAT'S NEXT?

Growth supported by rising penetration of modern grocery retailers and urbanisation

Appealing packaging and innovation will strengthen Société des Boissons du Cap Bon's leadership

Health and wellness trend to remain a key driver of juice sales

COMPETITIVE LANDSCAPE

Leading Société des Boissons du Cap Bon benefits from strong brand awareness

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RTD Coffee in Tunisia

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Development of healthier options unlikely

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[RTD Tea in Tunisia](#)

KEY DATA FINDINGS

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INDUSTRY PERFORMANCE

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WHAT'S NEXT?

Limited growth expected

Limited impact of health and wellness

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[Energy Drinks in Tunisia](#)

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INDUSTRY PERFORMANCE

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WHAT'S NEXT?

Return to growth from 2027 with gradual economic improvements

Innovation to maintain consumer interest

Efforts to curb smuggled energy drinks having a positive impact

COMPETITIVE LANDSCAPE

Groupe Bayahi, with Red Bull, dominates
Société Shark Tunisie strengthens its position

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[Sports Drinks in Tunisia](#)

2025 DEVELOPMENTS

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