



RTD Coffee in Tunisia

December 2025

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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

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Soft Drinks in Tunisia - Industry Overview

EXECUTIVE SUMMARY

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 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

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