

Snacks in Tunisia

July 2023

Table of Contents

Snacks in Tunisia

EXECUTIVE SUMMARY

Snacks in 2023: The big picture Key trends in 2023 Competitive Landscape Channel developments What next for snacks?

MARKET DATA

Table 1 - Sales of Snacks by Category: Volume 2018-2023
Table 2 - Sales of Snacks by Category: Value 2018-2023
Table 3 - Sales of Snacks by Category: % Volume Growth 2018-2023
Table 4 - Sales of Snacks by Category: % Value Growth 2018-2023
Table 5 - NBO Company Shares of Snacks: % Value 2019-2023
Table 6 - LBN Brand Shares of Snacks: % Value 2020-2023
Table 7 - Distribution of Snacks by Format: % Value 2018-2023
Table 8 - Forecast Sales of Snacks by Category: Volume 2023-2028
Table 9 - Forecast Sales of Snacks by Category: % Volume Growth 2023-2028
Table 10 - Forecast Sales of Snacks by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Chocolate Confectionery in Tunisia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sugar shortages negatively impact local production Rising prices driven up by higher cocoa prices Budgetary pressures reduce demand

PROSPECTS AND OPPORTUNITIES

Illicit trade to remain a key part of chocolate confectionery Tablets to remain the dominant category Economic issues and smuggling to constrain growth opportunities

CATEGORY DATA

Table 12 - Sales of Chocolate Confectionery by Category: Volume 2018-2023
Table 13 - Sales of Chocolate Confectionery by Category: Value 2018-2023
Table 14 - Sales of Chocolate Confectionery by Category: % Volume Growth 2018-2023
Table 15 - Sales of Chocolate Confectionery by Category: % Value Growth 2018-2023
Table 16 - Sales of Chocolate Tablets by Type: % Value 2018-2023
Table 17 - NBO Company Shares of Chocolate Confectionery: % Value 2019-2023
Table 18 - LBN Brand Shares of Chocolate Confectionery: % Value 2020-2023
Table 19 - Distribution of Chocolate Confectionery by Format: % Value 2018-2023
Table 20 - Forecast Sales of Chocolate Confectionery by Category: Volume 2023-2028
Table 21 - Forecast Sales of Chocolate Confectionery by Category: % Volume Growth 2023-2028
Table 22 - Forecast Sales of Chocolate Confectionery by Category: % Volume Growth 2023-2028
Table 23 - Forecast Sales of Chocolate Confectionery by Category: % Value Growth 2023-2028

Gum in Tunisia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Competition intensifies between smuggled and legally imported brands Gum is dominated by local brands Widespread distribution benefits gum category

PROSPECTS AND OPPORTUNITIES

Domestic brands to continue dominance over forthcoming period Local companies to focus on innovation Traditional grocery retailers will remain the most important distribution channels

CATEGORY DATA

Table 24 - Sales of Gum by Category: Volume 2018-2023Table 25 - Sales of Gum by Category: Value 2018-2023Table 26 - Sales of Gum by Category: % Volume Growth 2018-2023Table 27 - Sales of Gum by Category: % Value Growth 2018-2023Table 28 - NBO Company Shares of Gum: % Value 2019-2023Table 29 - LBN Brand Shares of Gum: % Value 2020-2023Table 30 - Distribution of Gum by Format: % Value 2018-2023Table 31 - Forecast Sales of Gum by Category: Volume 2023-2028Table 32 - Forecast Sales of Gum by Category: Walue 2023-2028Table 33 - Forecast Sales of Gum by Category: % Volume Growth 2023-2028Table 34 - Forecast Sales of Gum by Category: % Value Growth 2023-2028

Sugar Confectionery in Tunisia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Pastilles, gummies, jellies and chews records strongest value and volume growth in 2023 Domestic players dominate category Imported products battling to make inroads

PROSPECTS AND OPPORTUNITIES

Positive performance expected over the forecast period Traditional retailers will continue to lead distribution over the forthcoming period Sugar-free and "light" sugar confectionery is expected to gain share

CATEGORY DATA

Summary 2 - Other Sugar Confectionery by Product Type: 2023 Table 35 - Sales of Sugar Confectionery by Category: Volume 2018-2023 Table 36 - Sales of Sugar Confectionery by Category: Value 2018-2023 Table 37 - Sales of Sugar Confectionery by Category: % Volume Growth 2018-2023 Table 38 - Sales of Sugar Confectionery by Category: % Value Growth 2018-2023 Table 39 - Sales of Pastilles, Gummies, Jellies and Chews by Type: % Value 2018-2023 Table 40 - NBO Company Shares of Sugar Confectionery: % Value 2019-2023 Table 41 - LBN Brand Shares of Sugar Confectionery: % Value 2020-2023 Table 42 - Distribution of Sugar Confectionery by Format: % Value 2018-2023 Table 43 - Forecast Sales of Sugar Confectionery by Category: Volume 2023-2028 Table 44 - Forecast Sales of Sugar Confectionery by Category: Value 2023-2028 Table 45 - Forecast Sales of Sugar Confectionery by Category: % Volume Growth 2023-2028 Table 46 - Forecast Sales of Sugar Confectionery by Category: % Value Growth 2023-2028

Ice Cream in Tunisia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Premium foreign brands attracted into Tunisia Traditional retailers dominate sales London Dairy gains further retail value share

PROSPECTS AND OPPORTUNITIES

Sugar-free and organic products to emerge Artisanal ice cream expected to perform well as foodservice outlets expand GIPA will keep dominating ice cream and frozen desserts in Tunisia

CATEGORY DATA

Table 47 - Sales of Ice Cream by Category: Volume 2018-2023Table 48 - Sales of Ice Cream by Category: Value 2018-2023Table 49 - Sales of Ice Cream by Category: % Volume Growth 2018-2023Table 50 - Sales of Ice Cream by Category: % Value Growth 2018-2023Table 51 - NBO Company Shares of Ice Cream: % Value 2019-2023Table 52 - LBN Brand Shares of Ice Cream: % Value 2020-2023Table 53 - Distribution of Ice Cream by Format: % Value 2018-2023Table 54 - Forecast Sales of Ice Cream by Category: Volume 2023-2028Table 55 - Forecast Sales of Ice Cream by Category: % Volume Growth 2023-2028Table 56 - Forecast Sales of Ice Cream by Category: % Volume Growth 2023-2028Table 57 - Forecast Sales of Ice Cream by Category: % Volume Growth 2023-2028

Savoury Snacks in Tunisia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Potato chips is always the first choice for Tunisians Savoury biscuits category under development Stronger focus on social media advertising

PROSPECTS AND OPPORTUNITIES

Steady performance expected over forthcoming period Health and wellness trend to drive consumer choices in savoury snacks Cerealis SA will maintain lead in savoury snacks

CATEGORY DATA

Table 58 - Sales of Savoury Snacks by Category: Volume 2018-2023Table 59 - Sales of Savoury Snacks by Category: Value 2018-2023Table 60 - Sales of Savoury Snacks by Category: % Volume Growth 2018-2023Table 61 - Sales of Savoury Snacks by Category: % Value Growth 2018-2023Table 62 - NBO Company Shares of Savoury Snacks: % Value 2019-2023Table 63 - LBN Brand Shares of Savoury Snacks: % Value 2020-2023Table 64 - Distribution of Savoury Snacks by Format: % Value 2018-2023Table 65 - Forecast Sales of Savoury Snacks by Category: Volume 2023-2028Table 66 - Forecast Sales of Savoury Snacks by Category: Value 2023-2028Table 67 - Forecast Sales of Savoury Snacks by Category: % Volume Growth 2023-2028

Sweet Biscuits, Snack Bars and Fruit Snacks in Tunisia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Choco Tom wafer launches from Société l'Appetissante SARL Snack bars emerges as the new star product Expansion of low-priced Algerian brands in 2023

PROSPECTS AND OPPORTUNITIES

Bright outlook for the category Further unit price growth expected in upcoming period Dried fruit to record strong value growth

CATEGORY DATA

Table 69 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2018-2023 Table 70 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2018-2023 Table 71 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2018-2023 Table 72 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2018-2023 Table 73 - NBO Company Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2019-2023 Table 74 - LBN Brand Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2020-2023 Table 75 - NBO Company Shares of Sweet Biscuits: % Value 2019-2023 Table 76 - LBN Brand Shares of Sweet Biscuits: % Value 2020-2023 Table 77 - NBO Company Shares of Snack Bars: % Value 2019-2023 Table 78 - LBN Brand Shares of Snack Bars: % Value 2020-2023 Table 79 - NBO Company Shares of Fruit Snacks: % Value 2019-2023 Table 80 - LBN Brand Shares of Fruit Snacks: % Value 2020-2023 Table 81 - Distribution of Sweet Biscuits, Snack Bars and Fruit Snacks by Format: % Value 2018-2023 Table 82 - Distribution of Sweet Biscuits by Format: % Value 2018-2023 Table 83 - Distribution of Snack Bars by Format: % Value 2018-2023 Table 84 - Distribution of Fruit Snacks by Format: % Value 2018-2023 Table 85 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2023-2028 Table 86 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2023-2028 Table 87 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2023-2028 Table 88 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2023-2028

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.