



Euromonitor
International

Cooking Ingredients and Meals in Tunisia

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Cooking Ingredients and Meals in Tunisia

EXECUTIVE SUMMARY

Urbanisation drives demand but affordability remains key

KEY TRENDS

INDUSTRY PERFORMANCE

Rising prices limit demand

Health and wellness is emerging trend

Growing demand for convenient meal solutions

WHAT'S NEXT?

Modernisation and convenience to drive growth

Continued focus on everyday value

Private label will gain traction

COMPETITIVE LANDSCAPE

Lesieur Cristal SA leads sales as the OCT loses ground

Dr Oetker Gias Sarl gains traction with Vanoise Ma Crème à Tartiner

CHANNELS

Small local grocers continue to dominate distribution

Discounters is fastest growing channel

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Edible oils retain central role

INDUSTRY PERFORMANCE

Robust performance for edible oils

Corn oil and sunflower oil drive value growth

WHAT'S NEXT

Declining subsidies and other government initiatives will support long-term growth
Rising health consciousness will drive demand for sunflower oil
Product innovation will stimulate consumer interest

COMPETITIVE LANDSCAPE

Lesieur Cristal SA maintains leadership
GLAS gains ground with Nejma brand

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Small local grocers continue to play central role
Discounters gain popularity

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Urban convenience sustains demand

INDUSTRY PERFORMANCE

Rising prices drive value growth amid stagnant demand
Convenience and local flavour innovation boost value growth in ready meals

WHAT'S NEXT?

Busy lifestyles and rising prices will drive growth but urban restaurant delivery services could impede further development
Health and wellness will remain minor focus
Limited innovation anticipated

COMPETITIVE LANDSCAPE

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Small local grocers remains leading channel
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2025 DEVELOPMENTS

Urban convenience drives demand

INDUSTRY PERFORMANCE

Rising prices and lifestyle changes shape demand

Ketchup leads growth

WHAT'S NEXT?

Mixed outlook for sauces, dips and condiments

Health and wellness will remain a niche, yet growing trend

Imported and international brands to drive product innovation

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SICAM maintains leadership

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Sweet Spreads in Tunisia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Urbanisation and growth of modern retail fuel growth

INDUSTRY PERFORMANCE

Urbanisation and middle-class expansion boosts growth

Honey emerges as most dynamic category

WHAT'S NEXT?

Sweet spreads will continue to gain popularity

Health and wellness trend will gain traction

Expansion of modern distribution channels will fuel growth

COMPETITIVE LANDSCAPE

Société Tunisienne de Chocolaterie et de Confiserie maintains leadership

Dr Oetker Gias Sarl is most dynamic player

CHANNELS

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