

# **Staple Foods in Tunisia**

December 2024

Table of Contents

# Staple Foods in Tunisia

# EXECUTIVE SUMMARY

Staple foods in 2024: The big picture Key trends in 2024 Competitive landscape Channel developments What next for staple foods?

#### MARKET DATA

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

#### DISCLAIMER

SOURCES

Summary 1 - Research Sources

#### Baked Goods in Tunisia

# **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Dampened volume sales, as inflation still bites Competitive landscape remains highly fragmented Rising interest in offerings with a healthier positioning

#### PROSPECTS AND OPPORTUNITIES

Muted overall volume growth over forecast period Value growth though added benefits Muted performance for unpackaged leavened bread

# CATEGORY DATA

Table 13 - Sales of Baked Goods by Category: Volume 2019-2024Table 14 - Sales of Baked Goods by Category: Value 2019-2024Table 15 - Sales of Baked Goods by Category: % Volume Growth 2019-2024Table 16 - Sales of Baked Goods by Category: % Value Growth 2019-2024Table 17 - Sales of Pastries by Type: % Value 2019-2024Table 18 - NBO Company Shares of Baked Goods: % Value 2020-2024Table 20 - Distribution of Baked Goods by Format: % Value 2019-2024Table 21 - Forecast Sales of Baked Goods by Category: Volume 2024-2029Table 22 - Forecast Sales of Baked Goods by Category: Value 2024-2029Table 23 - Forecast Sales of Baked Goods by Category: % Volume Growth 2024-2029

# Breakfast Cereals in Tunisia

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Positive growth, though value sales still low Double-digit percentage volume growth for muesli and granola Local brands, as well as emerging private label look to compete

#### PROSPECTS AND OPPORTUNITIES

Healthy growth over forecast period Increasing focus on healthier positioning Rising demand for on-the-go options

#### CATEGORY DATA

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

# Processed Fruit and Vegetables in Tunisia

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Persistent drought boost volume sales Increasing offerings of frozen vegetables and potatoes Imported brands dominate

# PROSPECTS AND OPPORTUNITIES

Positive outlook over forecast period Frozen processed vegetables registers healthy performance over forecast period Shelf stable fruit registers volume decline

#### CATEGORY DATA

Table 36 - Sales of Processed Fruit and Vegetables by Category: Volume 2019-2024Table 37 - Sales of Processed Fruit and Vegetables by Category: Value 2019-2024Table 38 - Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2019-2024Table 39 - Sales of Processed Fruit and Vegetables by Category: % Value Growth 2019-2024Table 40 - Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2019-2024Table 41 - NBO Company Shares of Processed Fruit and Vegetables: % Value 2020-2024Table 42 - LBN Brand Shares of Processed Fruit and Vegetables: % Value 2021-2024Table 43 - Distribution of Processed Fruit and Vegetables by Format: % Value 2019-2024Table 44 - Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2024-2029Table 45 - Forecast Sales of Processed Fruit and Vegetables by Category: Value 2024-2029

Table 46 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2024-2029Table 47 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2024-2029

# Processed Meat, Seafood and Alternatives To Meat in Tunisia

#### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Positive performance, with shelf stable seafood continuing to be most popular product Increased availability of ham Local brands dominate

#### PROSPECTS AND OPPORTUNITIES

Shelf stable seafood registers healthy volume growth Expansion of modern grocery retailers will support growth Emphasis on convenience and health

#### CATEGORY DATA

Table 48 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2019-2024Table 49 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2019-2024Table 50 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2019-2024Table 51 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2019-2024Table 52 - Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2019-2024Table 53 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2019-2024Table 54 - Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2019-2024Table 55 - Sales of Frozen Processed Poultry by Type: % Value Breakdown 2019-2024Table 56 - Sales of Frozen Processed Seafood by Type: % Value Breakdown 2019-2024Table 57 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2020-2024Table 58 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2019-2024Table 59 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2024-2029Table 60 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2024-2029

# Rice, Pasta and Noodles in Tunisia

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Opposing picture for pasta and rice Instant noodles continues to grow in popularity Pasta continues to attract international players

#### PROSPECTS AND OPPORTUNITIES

Further decline in volume sales for rice Instant noodles pouches best performer Retail developments set to support growth

# CATEGORY DATA

Table 62 - Sales of Rice, Pasta and Noodles by Category: Volume 2019-2024Table 63 - Sales of Rice, Pasta and Noodles by Category: Value 2019-2024Table 64 - Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2019-2024Table 65 - Sales of Rice, Pasta and Noodles by Category: % Value Growth 2019-2024Table 66 - Sales of Instant Noodles by Leading Flavours: Rankings 2019-2024Table 67 - NBO Company Shares of Rice, Pasta and Noodles: % Value 2020-2024

Table 68 - LBN Brand Shares of Rice, Pasta and Noodles: % Value 2021-2024
Table 69 - NBO Company Shares of Rice: % Value 2020-2024
Table 70 - LBN Brand Shares of Rice: % Value 2021-2024
Table 71 - NBO Company Shares of Pasta: % Value 2020-2024
Table 72 - LBN Brand Shares of Pasta: % Value 2021-2024
Table 73 - NBO Company Shares of Noodles: % Value 2020-2024
Table 74 - LBN Brand Shares of Noodles: % Value 2021-2024
Table 75 - Distribution of Rice, Pasta and Noodles by Format: % Value 2019-2024
Table 76 - Distribution of Rice by Format: % Value 2019-2024
Table 77 - Distribution of Pasta by Format: % Value 2019-2024
Table 78 - Distribution of Noodles by Format: % Value 2019-2024
Table 79 - Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2024-2029
Table 80 - Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2024-2029
Table 81 - Forecast Sales of Rice, Pasta and Noodles 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/staple-foods-in-tunisia/report.