



Staple Foods in Tunisia

January 2026

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Staple Foods in Tunisia

EXECUTIVE SUMMARY

Old reliables continue to be popular

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Modest volume growth as inflations slow
Rising health consciousness has growing influence
Less mature segments register higher value growth

WHAT'S NEXT?

Further growth over forecast period
Innovation way to stand out from crowd
Growing demand for healthier options

COMPETITIVE LANDSCAPE

ManarThon SA benefits from attractive prices and wide distribution
Competitive landscape increasingly fragmented

CHANNELS

Small local grocers continue to dominate
Discounters gain most value share

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Baked Goods in Tunisia

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Unpackaged leavened bread accounts for most value sales

INDUSTRY PERFORMANCE

Muted volume growth
Dessert mixes gain most value share

WHAT'S NEXT

Continuing growth over forecast period
Focus on a healthier positioning
Technological advancements improve efficiencies

COMPETITIVE LANDSCAPE

Some consolidation in 2025
Société Le Boulanger gains most value share

CHANNELS

Small local grocers continue to lead distribution
Discounters gain most value share

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[Breakfast Cereals in Tunisia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Competitive landscape becoming more fragmented

INDUSTRY PERFORMANCE

Positive performance in 2025
Muesli and granola gains most value share

WHAT'S NEXT?

Rosy outlook over forecast period
Local pressure to offer healthier breakfast cereals
Rising concern in terms of sustainability

COMPETITIVE LANDSCAPE

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CHANNELS

Small local grocers continue to dominate
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[Processed Fruit and Vegetables in Tunisia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Shelf stable accounts for most volume sales

INDUSTRY PERFORMANCE

Modest volume growth in 2025

Frozen processed potatoes gains most value share

WHAT'S NEXT?

Healthy outlook over forecast period

Rising health consciousness influences product development over forecast period

Increasing focus on offerings in line with local palette

COMPETITIVE LANDSCAPE

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CHANNELS

Small local grocers continue to dominate

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[Processed Meat, Seafood and Alternatives To Meat in Tunisia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Shelf stable seafood account for most volume sales

INDUSTRY PERFORMANCE

Increased value sales in 2025

Frozen processed red meat gains most value share

WHAT'S NEXT?

Healthy outlook over forecast period

More focus on highlighting health benefits

Affordability remains key

COMPETITIVE LANDSCAPE

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CHANNELS

Small local grocers continue to dominate

Discounters gain most value share

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Pasta and rice continue to be subsidised

INDUSTRY PERFORMANCE

Pasta continues to dominate

Rice gains most value share in 2025

WHAT'S NEXT?

Modest value and volume growth over forecast period

Gluten-free pasta gets boost from new subsidy

Increasing liberalisation over forecast period

COMPETITIVE LANDSCAPE

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CHANNELS

Small local grocers dominate

Discounters gain most value share

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