

Retail in Tunisia

April 2023

Table of Contents

EXECUTIVE SUMMARY

Retail in 2022: The big picture

Informal retail

What next for retail?

MARKET DATA

Table 1 - Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2017-2022

Table 2 - Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2017-2022

Table 3 - Sales in Retail Offline by Channel: Value 2017-2022

Table 4 - Sales in Retail Offline by Channel: % Value Growth 2017-2022

Table 5 - Retail Offline Outlets by Channel: Units 2017-2022

Table 6 - Retail Offline Outlets by Channel: % Unit Growth 2017-2022

Table 7 - Retail GBO Company Shares: % Value 2018-2022

Table 8 - Retail GBN Brand Shares: % Value 2019-2022

Table 9 - Retail Offline GBO Company Shares: % Value 2018-2022

Table 10 - Retail Offline GBN Brand Shares: % Value 2019-2022

Table 11 - Retail Offline LBN Brand Shares: Outlets 2019-2022

Table 12 - Retail E-Commerce GBO Company Shares: % Value 2018-2022

Table 13 - Retail E-Commerce GBN Brand Shares: % Value 2019-2022

Table 14 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2022-2027

Table 15 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2022-2027

Table 16 - Forecast Sales in Retail Offline by Channel: Value 2022-2027

Table 17 - Forecast Sales in Retail Offline by Channel: % Value Growth 2022-2027

Table 18 - Forecast Retail Offline Outlets by Channel: Units 2022-2027

Table 19 - Forecast Retail Offline Outlets by Channel: % Unit Growth 2022-2027

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Grocery Retailers in Tunisia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Tumultuous times prompt intervention to reduce prices

Carrefour adapts to evolving demand and secures leadership

Forecourt retailers benefit from investment in petrol stations

PROSPECTS AND OPPORTUNITIES

Food insecurity to continue as political tensions pose potential threat to growth

New development to bolster urban-based outlets, though more work is needed to promote substantial growth overall

Discounters to gain further ground, driven by Aziza's aggressive expansion

CHANNEL DATA

Table 20 - Grocery Retailers: Value Sales, Outlets and Selling Space 2017-2022

Table 21 - Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2017-2022

Table 22 - Sales in Grocery Retailers by Channel: Value 2017-2022

Table 23 - Sales in Grocery Retailers by Channel: % Value Growth 2017-2022

Table 24 - Grocery Retailers Outlets by Channel: Units 2017-2022

Table 25 - Grocery Retailers Outlets by Channel: % Unit Growth 2017-2022

Table 26 - Grocery Retailers GBO Company Shares: % Value 2018-2022

Table 27 - Grocery Retailers GBN Brand Shares: % Value 2019-2022

Table 28 - Grocery Retailers LBN Brand Shares: Outlets 2019-2022

Table 29 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2022-2027

Table 30 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2022-2027

Table 31 - Forecast Sales in Grocery Retailers by Channel: Value 2022-2027

Table 32 - Forecast Sales in Grocery Retailers by Channel: % Value Growth 2022-2027

Table 33 - Forecast Grocery Retailers Outlets by Channel: Units 2022-2027

Table 34 - Forecast Grocery Retailers Outlets by Channel: % Unit Growth 2022-2027

Non-Grocery Retailers in Tunisia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Rising costs in raw materials and the persistent expansion of illicit trading curbs growth in home products specialists in 2022

Appliances and electronics specialists take issue with new government policies

Pharmacies suffers shortages as major players exit the country

PROSPECTS AND OPPORTUNITIES

More multinational withdrawals feared

Discount partnership with El Araby to boost local production

Growth threatened by persistent threat from informal retailers

CHANNEL DATA

Table 35 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space 2017-2022

Table 36 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2017-2022

Table 37 - Non-Grocery Retailers GBO Company Shares: % Value 2018-2022

Table 38 - Non-Grocery Retailers GBN Brand Shares: % Value 2019-2022

Table 39 - Non-Grocery Retailers LBN Brand Shares: Outlets 2019-2022

Table 40 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2022-2027

Table 41 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2022-2027

Table 42 - Forecast Sales in Non-Grocery Retailers by Channel: Value 2022-2027

Table 43 - Forecast Sales in Non-Grocery Retailers by Channel: % Value Growth 2022-2027

Table 44 - Forecast Non-Grocery Retailers Outlets by Channel: Units 2022-2027

Table 45 - Forecast Non-Grocery Retailers Outlets by Channel: % Unit Growth 2022-2027

Direct Selling in Tunisia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Direct selling attracts agents amid economic uncertainty

Leading player Areva Nature benefits from health and wellness trends

Oriflame maintains second place despite drop in value share

PROSPECTS AND OPPORTUNITIES

Economic constraints will force players to adapt in terms of products and prices

Health and beauty to continue to drive growth as female-focused sustainability is set to take on greater importance

Rising unemployment may attract more agents to direct selling

CHANNEL DATA

Table 46 - Direct Selling by Product: Value 2017-2022

Table 47 - Direct Selling by Product: % Value Growth 2017-2022

Table 48 - Direct Selling GBO Company Shares: % Value 2018-2022

Table 49 - Direct Selling GBN Brand Shares: % Value 2019-2022

Table 50 - Direct Selling Forecasts by Product: Value 2022-2027

Table 51 - Direct Selling Forecasts by Product: % Value Growth 2022-2027

Retail E-Commerce in Tunisia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Retail e-commerce rises rapidly in 2022

Magasin Général acquires Founa

E-commerce offers new job opportunities

PROSPECTS AND OPPORTUNITIES

Growth to continue, fuelled by collaborations and investment

Though demand will rise, growth is threatened by the continued expansion of the informal market

Government intervention necessary to foster prolonged growth

CHANNEL DATA

Table 52 - Retail E-Commerce by Product: Value 2017-2022

Table 53 - Retail E-Commerce by Product: % Value Growth 2017-2022

Table 54 - Retail E-Commerce GBO Company Shares: % Value 2018-2022

Table 55 - Retail E-Commerce GBN Brand Shares: % Value 2019-2022

Table 56 - Forecast Retail E-Commerce by Product: Value 2022-2027

Table 57 - Forecast Retail E-Commerce by Product: % Value Growth 2022-2027

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/retail-in-tunisia/report.