

# Alcoholic Drinks in Tunisia

June 2024

Table of Contents

## EXECUTIVE SUMMARY

Alcoholic drinks in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

On-trade vs off-trade split

What next for alcoholic drinks?

## MARKET BACKGROUND

Legislation

Legal purchasing age and legal drinking age

Drink driving

Advertising

Smoking ban

Opening hours

On-trade establishments

Summary 1 - Number of On-trade Establishments by Type 2017-2023

## TAXATION AND DUTY LEVIES

Summary 2 - Taxation and Duty Levies on Alcoholic Drinks 2023

## OPERATING ENVIRONMENT

Contraband/parallel trade

Duty free

Cross-border/private imports

## KEY NEW PRODUCT LAUNCHES

Outlook:

## MARKET INDICATORS

Table 1 - Retail Consumer Expenditure on Alcoholic Drinks 2018-2023

## MARKET DATA

Table 2 - Sales of Alcoholic Drinks by Category: Total Volume 2018-2023

Table 3 - Sales of Alcoholic Drinks by Category: Total Value 2018-2023

Table 4 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2018-2023

Table 5 - Sales of Alcoholic Drinks by Category: % Total Value Growth 2018-2023

Table 6 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2023

Table 7 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2023

Table 8 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2023

Table 9 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2023

Table 10 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2019-2023

Table 11 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2018-2023

Table 12 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2023

Table 13 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2023-2028

Table 14 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2023-2028

Table 15 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2023-2028

Table 16 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2023-2028

## DISCLAIMER

## SOURCES

## Summary 3 - Research Sources

### Beer in Tunisia

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Declining market dynamics

Rise of "El Beya" beer

Sustained leadership of "Celtia" beer

##### PROSPECTS AND OPPORTUNITIES

Impact of taxation on market dynamics

Surge in demand for non/low alcohol beer

Persistence of local production

##### CATEGORY BACKGROUND

Lager price band methodology

Summary 4 - Lager by Price Band 2023

##### CATEGORY DATA

Table 17 - Sales of Beer by Category: Total Volume 2018-2023

Table 18 - Sales of Beer by Category: Total Value 2018-2023

Table 19 - Sales of Beer by Category: % Total Volume Growth 2018-2023

Table 20 - Sales of Beer by Category: % Total Value Growth 2018-2023

Table 21 - Sales of Beer by Off-trade vs On-trade: Volume 2018-2023

Table 22 - Sales of Beer by Off-trade vs On-trade: Value 2018-2023

Table 23 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2018-2023

Table 24 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2018-2023

Table 25 - GBO Company Shares of Beer: % Total Volume 2019-2023

Table 26 - NBO Company Shares of Beer: % Total Volume 2019-2023

Table 27 - LBN Brand Shares of Beer: % Total Volume 2019-2023

Table 28 - Forecast Sales of Beer by Category: Total Volume 2023-2028

Table 29 - Forecast Sales of Beer by Category: Total Value 2023-2028

Table 30 - Forecast Sales of Beer by Category: % Total Volume Growth 2023-2028

Table 31 - Forecast Sales of Beer by Category: % Total Value Growth 2023-2028

### Rtds in Tunisia

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Historical volume increase driven by RTDs

Exo Mix dominates the product area

Sunset RTDs face decline

##### PROSPECTS AND OPPORTUNITIES

Dynamic outlook

Challenges for Exo's leadership

Role of social media in marketing

##### CATEGORY DATA

Table 32 - Sales of RTDs by Category: Total Volume 2018-2023

Table 33 - Sales of RTDs by Category: Total Value 2018-2023

Table 34 - Sales of RTDs by Category: % Total Volume Growth 2018-2023

Table 35 - Sales of RTDs by Category: % Total Value Growth 2018-2023  
Table 36 - Sales of RTDs by Off-trade vs On-trade: Volume 2018-2023  
Table 37 - Sales of RTDs by Off-trade vs On-trade: Value 2018-2023  
Table 38 - Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2018-2023  
Table 39 - Sales of RTDs by Off-trade vs On-trade: % Value Growth 2018-2023  
Table 40 - GBO Company Shares of RTDs: % Total Volume 2019-2023  
Table 41 - NBO Company Shares of RTDs: % Total Volume 2019-2023  
Table 42 - LBN Brand Shares of RTDs: % Total Volume 2019-2023  
Table 43 - Forecast Sales of RTDs by Category: Total Volume 2023-2028  
Table 44 - Forecast Sales of RTDs by Category: Total Value 2023-2028  
Table 45 - Forecast Sales of RTDs by Category: % Total Volume Growth 2023-2028  
Table 46 - Forecast Sales of RTDs by Category: % Total Value Growth 2023-2028

## Spirits in Tunisia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Challenges in the spirits area  
Decline in whiskies  
Poliakov Vodka's popularity

#### PROSPECTS AND OPPORTUNITIES

Rise of economic spirits  
Impact of inflation and price hikes  
Role of on-trade sales

#### CATEGORY DATA

Table 47 - Sales of Spirits by Category: Total Volume 2018-2023  
Table 48 - Sales of Spirits by Category: Total Value 2018-2023  
Table 49 - Sales of Spirits by Category: % Total Volume Growth 2018-2023  
Table 50 - Sales of Spirits by Category: % Total Value Growth 2018-2023  
Table 51 - Sales of Spirits by Off-trade vs On-trade: Volume 2018-2023  
Table 52 - Sales of Spirits by Off-trade vs On-trade: Value 2018-2023  
Table 53 - Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2018-2023  
Table 54 - Sales of Spirits by Off-trade vs On-trade: % Value Growth 2018-2023  
Table 55 - GBO Company Shares of Spirits: % Total Volume 2019-2023  
Table 56 - NBO Company Shares of Spirits: % Total Volume 2019-2023  
Table 57 - LBN Brand Shares of Spirits: % Total Volume 2019-2023  
Table 58 - Forecast Sales of Spirits by Category: Total Volume 2023-2028  
Table 59 - Forecast Sales of Spirits by Category: Total Value 2023-2028  
Table 60 - Forecast Sales of Spirits by Category: % Total Volume Growth 2023-2028  
Table 61 - Forecast Sales of Spirits by Category: % Total Value Growth 2023-2028

## Wine in Tunisia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Narrowing gap between imported and local wine  
Surge in Rosé wine consumption  
Dominance of Les Vignerons de Carthage

#### PROSPECTS AND OPPORTUNITIES

Potential introduction of non-alcoholic wine  
Development of imported wine  
Growth in on-trade channels driving consumer awareness

#### CATEGORY DATA

Table 62 - Sales of Wine by Category: Total Volume 2018-2023  
Table 63 - Sales of Wine by Category: Total Value 2018-2023  
Table 64 - Sales of Wine by Category: % Total Volume Growth 2018-2023  
Table 65 - Sales of Wine by Category: % Total Value Growth 2018-2023  
Table 66 - Sales of Wine by Off-trade vs On-trade: Volume 2018-2023  
Table 67 - Sales of Wine by Off-trade vs On-trade: Value 2018-2023  
Table 68 - Sales of Wine by Off-trade vs On-trade: % Volume Growth 2018-2023  
Table 69 - Sales of Wine by Off-trade vs On-trade: % Value Growth 2018-2023  
Table 70 - Forecast Sales of Wine by Category: Total Volume 2023-2028  
Table 71 - Forecast Sales of Wine by Category: Total Value 2023-2028  
Table 72 - Forecast Sales of Wine by Category: % Total Volume Growth 2023-2028  
Table 73 - Forecast Sales of Wine by Category: % Total 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/alcoholic-drinks-in-tunisia/report](http://www.euromonitor.com/alcoholic-drinks-in-tunisia/report).