

Dairy Products and Alternatives in Tunisia

September 2023

Table of Contents

Dairy Products and Alternatives in Tunisia

EXECUTIVE SUMMARY

Dairy products and alternatives in 2023: The big picture

Key trends in 2023

Competitive Landscape

Channel developments

What next for dairy products and alternatives?

MARKET DATA

Table 1 - Sales of Dairy Products and Alternatives by Category: Value 2018-2023

Table 2 - Sales of Dairy Products and Alternatives by Category: % Value Growth 2018-2023

Table 3 - NBO Company Shares of Dairy Products and Alternatives: % Value 2019-2023

Table 4 - LBN Brand Shares of Dairy Products and Alternatives: % Value 2020-2023

Table 5 - Distribution of Dairy Products and Alternatives by Format: % Value 2018-2023

Table 6 - Forecast Sales of Dairy Products and Alternatives by Category: Value 2023-2028

Table 7 - Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby Food in Tunisia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Local prepared baby food brands rise as consumers appreciate domestic offerings

Baby milk formula is on demand despite high levels of inflation

Materna records solid growth within modern grocery retailers

PROSPECTS AND OPPORTUNITIES

Due to the increase in working mothers, breastfeeding in Tunisia declines

The important presence of modern grocery retailers over the forecast period

Prospects look positive for the development of local brands

CATEGORY DATA

Table 8 - Sales of Baby Food by Category: Volume 2018-2023

Table 9 - Sales of Baby Food by Category: Value 2018-2023

Table 10 - Sales of Baby Food by Category: % Volume Growth 2018-2023

Table 11 - Sales of Baby Food by Category: % Value Growth 2018-2023

Table 12 - NBO Company Shares of Baby Food: % Value 2019-2023

Table 13 - LBN Brand Shares of Baby Food: % Value 2020-2023

Table 14 - Distribution of Baby Food by Format: % Value 2018-2023

Table 15 - Forecast Sales of Baby Food by Category: Volume 2023-2028

Table 16 - Forecast Sales of Baby Food by Category: Value 2023-2028

Table 17 - Forecast Sales of Baby Food by Category: % Volume Growth 2023-2028

Table 18 - Forecast Sales of Baby Food by Category: % Value Growth 2023-2028

Butter and Spreads in Tunisia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Challenges and solutions for the Tunisia butter landscape in 2023

The impact of the butter shortage on margarine and spreads

Health and wellness shapes purchasing decisions for butter

PROSPECTS AND OPPORTUNITIES

Tunisians will focus cooking on margarine across the forecast period

Imported butter products to fill the gap in the Tunisian market

E-commerce gains ground as consumers appreciate convenience

CATEGORY DATA

Table 19 - Sales of Butter and Spreads by Category: Volume 2018-2023

Table 20 - Sales of Butter and Spreads by Category: Value 2018-2023

Table 21 - Sales of Butter and Spreads by Category: % Volume Growth 2018-2023

Table 22 - Sales of Butter and Spreads by Category: % Value Growth 2018-2023

Table 23 - NBO Company Shares of Butter and Spreads: % Value 2019-2023

Table 24 - LBN Brand Shares of Butter and Spreads: % Value 2020-2023

Table 25 - Distribution of Butter and Spreads by Format: % Value 2018-2023

Table 26 - Forecast Sales of Butter and Spreads by Category: Volume 2023-2028

Table 27 - Forecast Sales of Butter and Spreads by Category: Value 2023-2028

Table 28 - Forecast Sales of Butter and Spreads by Category: % Volume Growth 2023-2028

Table 29 - Forecast Sales of Butter and Spreads by Category: % Value Growth 2023-2028

Cheese in Tunisia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Illicit trade and smuggled goods is a growing challenge for the cheese landscape

The important presence of local cheese despite international competition

Advertising through social media to showcase products and highlight information

PROSPECTS AND OPPORTUNITIES

Spreadable processed cheese will continue to lead the landscape

Tight competition between local players over the forecast period

Players find ways to boost retail volume sales as price rises continue

CATEGORY DATA

Table 30 - Sales of Cheese by Category: Volume 2018-2023

Table 31 - Sales of Cheese by Category: Value 2018-2023

Table 32 - Sales of Cheese by Category: % Volume Growth 2018-2023

Table 33 - Sales of Cheese by Category: % Value Growth 2018-2023

Table 34 - Sales of Spreadable Processed Cheese by Type: % Value 2018-2023

Table 35 - NBO Company Shares of Cheese: % Value 2019-2023

Table 36 - LBN Brand Shares of Cheese: % Value 2020-2023

Table 37 - Distribution of Cheese by Format: % Value 2018-2023

Table 38 - Forecast Sales of Cheese by Category: Volume 2023-2028

Table 39 - Forecast Sales of Cheese by Category: Value 2023-2028

Table 40 - Forecast Sales of Cheese by Category: % Volume Growth 2023-2028

Table 41 - Forecast Sales of Cheese by Category: % Value Growth 2023-2028

Drinking Milk Products in Tunisia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Farmers' financial problems have a significant impact on shelf stable milk
Fat-free and full-fat shelf stable milk sees an increase in demand
Société Tunisienne des Industries Alimentaires leads drinking milk products

PROSPECTS AND OPPORTUNITIES

Health and wellness trends shape product development in drinking milk products
Important changes in regulations across the forecast period
International brands may enter the landscape across the forecast period

CATEGORY DATA

Table 42 - Sales of Drinking Milk Products by Category: Volume 2018-2023
Table 43 - Sales of Drinking Milk Products by Category: Value 2018-2023
Table 44 - Sales of Drinking Milk Products by Category: % Volume Growth 2018-2023
Table 45 - Sales of Drinking Milk Products by Category: % Value Growth 2018-2023
Table 46 - NBO Company Shares of Drinking Milk Products: % Value 2019-2023
Table 47 - LBN Brand Shares of Drinking Milk Products: % Value 2020-2023
Table 48 - Distribution of Drinking Milk Products by Format: % Value 2018-2023
Table 49 - Forecast Sales of Drinking Milk Products Products by Category: Volume 2023-2028
Table 50 - Forecast Sales of Drinking Milk Products Products by Category: Value 2023-2028
Table 51 - Forecast Sales of Drinking Milk Products Products by Category: % Volume Growth 2023-2028
Table 52 - Forecast Sales of Drinking Milk Products Products by Category: % Value Growth 2023-2028

Yoghurt and Sour Milk Products in Tunisia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Economic products increase as purchasing power declines
The brand YAB looks to compete with Délice and Vitalait
Tight competition between local players in drinking yoghurt

PROSPECTS AND OPPORTUNITIES

Rising health awareness bolsters the development of yoghurt and sour milk products
Modern grocery retailers are set to drive sales over the forecast period
Plain yoghurt set to see fierce competition over the forecast period

CATEGORY DATA

Table 53 - Sales of Yoghurt and Sour Milk Products by Category: Volume 2018-2023
Table 54 - Sales of Yoghurt and Sour Milk Products by Category: Value 2018-2023
Table 55 - Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2018-2023
Table 56 - Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2018-2023
Table 57 - NBO Company Shares of Yoghurt and Sour Milk Products: % Value 2019-2023
Table 58 - LBN Brand Shares of Yoghurt and Sour Milk Products: % Value 2020-2023
Table 59 - Distribution of Yoghurt and Sour Milk Products by Format: % Value 2018-2023
Table 60 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Volume 2023-2028
Table 61 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Value 2023-2028
Table 62 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2023-2028
Table 63 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2023-2028

Other Dairy in Tunisia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Tight competition as new players enter chilled dairy desserts
Cream faces difficulties due to the production decrease and rising prices
Lack of innovation and advertising keeps condensed milk stagnating

PROSPECTS AND OPPORTUNITIES

Falling purchasing power threatens the performance of other dairy
Cream will continue to dominate other dairy in Tunisia
Significant demand through e-commerce as players' focus on social media

CATEGORY DATA

Table 64 - Sales of Other Dairy by Category: Volume 2018-2023
Table 65 - Sales of Other Dairy by Category: Value 2018-2023
Table 66 - Sales of Other Dairy by Category: % Volume Growth 2018-2023
Table 67 - Sales of Other Dairy by Category: % Value Growth 2018-2023
Table 68 - NBO Company Shares of Other Dairy: % Value 2019-2023
Table 69 - LBN Brand Shares of Other Dairy: % Value 2020-2023
Table 70 - Distribution of Other Dairy by Format: % Value 2018-2023
Table 71 - Forecast Sales of Other Dairy by Category: Volume 2023-2028
Table 72 - Forecast Sales of Other Dairy by Category: Value 2023-2028
Table 73 - Forecast Sales of Other Dairy by Category: % Volume Growth 2023-2028
Table 74 - Forecast Sales of Other Dairy by Category: % 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/dairy-products-and-alternatives-in-tunisia/report.