



Processed Meat, Seafood and Alternatives To Meat in Tunisia

January 2026

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

Local company ManorThon holds on to commanding lead

Benkalia gains most value share

CHANNELS

Small local grocers continue to dominate

Discounters gain most value share

CATEGORY DATA

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Staple Foods in Tunisia - Industry Overview

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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