

Beauty and Personal Care in Tunisia

May 2023

Table of Contents

Beauty and Personal Care in Tunisia

EXECUTIVE SUMMARY

Beauty and personal care in 2022: The big picture

2022 key trends

Competitive landscape

Retailing developments

What next for beauty and personal care?

MARKET DATA

- Table 1 Sales of Beauty and Personal Care by Category: Value 2017-2022
- Table 2 Sales of Beauty and Personal Care by Category: % Value Growth 2017-2022
- Table 3 GBO Company Shares of Beauty and Personal Care: % Value 2018-2022
- Table 4 NBO Company Shares of Beauty and Personal Care: % Value 2018-2022
- Table 5 LBN Brand Shares of Beauty and Personal Care: % Value 2019-2022
- Table 6 Distribution of Beauty and Personal Care by Format: % Value 2017-2022
- Table 7 Distribution of Beauty and Personal Care by Format and Category: % Value 2022
- Table 8 Forecast Sales of Beauty and Personal Care by Category: Value 2022-2027
- Table 9 Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2022-2027

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby and Child-Specific Products in Tunisia.

KEY DATA FINDINGS

2022 DEVELOPMENTS

2022, a historical year of value growth

Important development of mass baby and child-specific products

Baby and child-specific hair care records the highest growth in 2022

PROSPECTS AND OPPORTUNITIES

A shift in marketing strategies from TV and mass media to online characterises the forecast period Positive performance of baby and child-specific products over the forecast period Success for this category makes it more attractive to both local and international companies

CATEGORY DATA

- Table 10 Sales of Baby and Child-specific Products by Category: Value 2017-2022
- Table 11 Sales of Baby and Child-specific Products by Category: % Value Growth 2017-2022
- Table 12 Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2017-2022
- Table 13 NBO Company Shares of Baby and Child-specific Products: % Value 2018-2022
- Table 14 LBN Brand Shares of Baby and Child-specific Products: % Value 2019-2022
- Table 15 LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2019-2022
- Table 16 LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2019-2022
- Table 17 Forecast Sales of Baby and Child-specific Products by Category: Value 2022-2027
- Table 18 Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2022-2027
- Table 19 Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2022-2027

Bath and Shower in Tunisia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Hand sanitisers no longer in demand due to alleviation of COVID-19 and the resumption of society

Category ripe for new product development proves attractive to local players

Tunisian company SATEM endeavours to compete with the leading players through new launches and intense advertising activity on social media

PROSPECTS AND OPPORTUNITIES

An important presence of international brands over the forecast period

Bar soap remains a strong and resilient category, despite developments in liquid soap and its rise to prominence during the height of the pandemic Important development of private label products over the forecast period

CATEGORY DATA

- Table 20 Sales of Bath and Shower by Category: Value 2017-2022
- Table 21 Sales of Bath and Shower by Category: % Value Growth 2017-2022
- Table 22 Sales of Bath and Shower by Premium vs Mass: % Value 2017-2022
- Table 23 NBO Company Shares of Bath and Shower: % Value 2018-2022
- Table 24 LBN Brand Shares of Bath and Shower: % Value 2019-2022
- Table 25 Forecast Sales of Bath and Shower by Category: Value 2022-2027
- Table 26 Forecast Sales of Bath and Shower by Category: % Value Growth 2022-2027
- Table 27 Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2022-2027

Colour Cosmetics in Tunisia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Sales of colour cosmetics recover in 2022 after two years of considerably reduced usage during the height of the pandemic

Growth in direct selling as the category rapidly expands

The important presence of the parallel trading hampers legitimate sales

PROSPECTS AND OPPORTUNITIES

Development of the local industry encouraged by the dominance of mass products

Social media becomes key in advertising activities

Nail polish faces difficulties over the forecast period from nail salons and the current fad for false nails

CATEGORY DATA

- Table 28 Sales of Colour Cosmetics by Category: Value 2017-2022
- Table 29 Sales of Colour Cosmetics by Category: % Value Growth 2017-2022
- Table 30 Sales of Colour Cosmetics by Premium vs Mass: % Value 2017-2022
- Table 31 NBO Company Shares of Colour Cosmetics: % Value 2018-2022
- Table 32 LBN Brand Shares of Colour Cosmetics: % Value 2019-2022
- Table 33 LBN Brand Shares of Premium Colour Cosmetics: % Value 2019-2022
- Table 34 Forecast Sales of Colour Cosmetics by Category: Value 2022-2027
- Table 35 Forecast Sales of Colour Cosmetics by Category: % Value Growth 2022-2027
- Table 36 Forecast Sales of Colour Cosmetics by Premium vs Mass: % Value 2022-2027

Deodorants in Tunisia

KEY DATA FINDINGS

2022 DEVELOPMENTS

2022 is characterised by historical unit price growth and a slowdown in demand for deodorants

Domestic player SATEM experiences strong growth and development

Henkel-Alki Tunisie retains top spot in deodorants thanks to its Souplesse brand

PROSPECTS AND OPPORTUNITIES

The category develops further over the forecast period with the entry of a number of new brands

Grocery retailers support forecast period sales

Growing demand for added-value deodorants such as those with invisible or organic credentials

CATEGORY DATA

Table 37 - Sales of Deodorants by Category: Value 2017-2022

Table 38 - Sales of Deodorants by Category: % Value Growth 2017-2022

Table 39 - Sales of Deodorants by Premium vs Mass: % Value 2017-2022

Table 40 - NBO Company Shares of Deodorants: % Value 2018-2022

Table 41 - LBN Brand Shares of Deodorants: % Value 2019-2022

Table 42 - Forecast Sales of Deodorants by Category: Value 2022-2027

Table 43 - Forecast Sales of Deodorants by Category: % Value Growth 2022-2027

Table 44 - Forecast Sales of Deodorants by Premium Vs Mass: % Value 2022-2027

Depilatories in Tunisia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Nihel retains its outright lead despite intensifying competition

Women's pre-shave begins to appear on the Tunisian market

Despite the popularity of traditional forms of depilation in the country, women's razors and blades sees the entry of a new brand creating competition for Gillette and Bic

PROSPECTS AND OPPORTUNITIES

Laser hair removal negatively impacts category sales over the forecast period

Sugaring remains a popular choice with leading player Nihel present in sugaring products

While the category remains dominated by mass products, new premium depilatories products make an entry

CATEGORY DATA

Table 45 - Sales of Depilatories by Category: Value 2017-2022

Table 46 - Sales of Depilatories by Category: % Value Growth 2017-2022

Table 47 - NBO Company Shares of Depilatories: % Value 2018-2022

Table 48 - LBN Brand Shares of Depilatories: % Value 2019-2022

Table 49 - Forecast Sales of Depilatories by Category: Value 2022-2027

Table 50 - Forecast Sales of Depilatories by Category: % Value Growth 2022-2027

Fragrances in Tunisia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Recovery year for fragrances in 2022 due to the full lifting of COVID-19 restrictions

Premium women's fragrances records the highest growth

Local players are absent from premium fragrances leaving the category in the hands of renowned international brands

PROSPECTS AND OPPORTUNITIES

Stagnation in volume growth of fragrances over the forecast period due to the economic crisis and high inflation with little change in the competitive environment

The forecast period sees intensifying competition in the health and beauty specialists channel

Illicit trade remains the main threat to the expansion of fragrances' sales

CATEGORY DATA

Table 51 - Sales of Fragrances by Category: Value 2017-2022

- Table 52 Sales of Fragrances by Category: % Value Growth 2017-2022
- Table 53 NBO Company Shares of Fragrances: % Value 2018-2022
- Table 54 LBN Brand Shares of Fragrances: % Value 2019-2022
- Table 55 LBN Brand Shares of Premium Men's Fragrances: % Value 2019-2022
- Table 56 LBN Brand Shares of Premium Women's Fragrances: % Value 2019-2022
- Table 57 Forecast Sales of Fragrances by Category: Value 2022-2027
- Table 58 Forecast Sales of Fragrances by Category: % Value Growth 2022-2027

Hair Care in Tunisia

KEY DATA FINDINGS

2022 DEVELOPMENTS

The parallel trade characterises salon professional hair care

Mass brands dominate hair care in Tunisia with premium products focusing on niche categories such as perms and relaxants

Conditioners and treatments performs well in 2022 due to growing consumer demand

PROSPECTS AND OPPORTUNITIES

Hair care remains an important category in the beauty and personal care market in the country with the competitive environment becoming increasingly intense

Modern grocery retailers support the distribution of hair care products over the forecast period

Natural and herbal hair care products remain trendy over the forecast period

CATEGORY DATA

- Table 59 Sales of Hair Care by Category: Value 2017-2022
- Table 60 Sales of Hair Care by Category: % Value Growth 2017-2022
- Table 61 Sales of Hair Care by Premium vs Mass: % Value 2017-2022
- Table 62 NBO Company Shares of Hair Care: % Value 2018-2022
- Table 63 LBN Brand Shares of Hair Care: % Value 2019-2022
- Table 64 NBO Company Shares of Salon Professional Hair Care: % Value 2018-2022
- Table 65 LBN Brand Shares of Salon Professional Hair Care: % Value 2019-2022
- Table 66 LBN Brand Shares of Premium Hair Care: % Value 2019-2022
- Table 67 Forecast Sales of Hair Care by Category: Value 2022-2027
- Table 68 Forecast Sales of Hair Care by Category: % Value Growth 2022-2027
- Table 69 Forecast Sales of Hair Care by Premium vs Mass: % Value 2022-2027

Men's Grooming in Tunisia

KEY DATA FINDINGS

2022 DEVELOPMENTS

2022 is a year of recovery for men's grooming after two unprecedented years of pandemic

Continuous growth of products dedicated to men thanks to initial new product launches by leading multinationals

New South Korean player Dorco enters the Tunisian men's grooming category in 2022

PROSPECTS AND OPPORTUNITIES

Slowing volume sales growth for men's grooming over the forecast period

Male preferences towards beards represent an important threat to the development of men's grooming over the forecast period Mass men's bath and shower records the highest volume growth over the forecast period

CATEGORY DATA

- Table 70 Sales of Men's Grooming by Category: Value 2017-2022
- Table 71 Sales of Men's Grooming by Category: % Value Growth 2017-2022
- Table 72 Sales of Men's Razors and Blades by Type: % Value Breakdown 2019-2022

- Table 73 Sales of Men's Skin Care by Type: % Value Breakdown 2019-2022
- Table 74 NBO Company Shares of Men's Grooming: % Value 2018-2022
- Table 75 LBN Brand Shares of Men's Grooming: % Value 2019-2022
- Table 76 LBN Brand Shares of Men's Razors and Blades: % Value 2019-2022
- Table 77 Forecast Sales of Men's Grooming by Category: Value 2022-2027
- Table 78 Forecast Sales of Men's Grooming by Category: % Value Growth 2022-2027

Oral Care in Tunisia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Oral care sees limited damage from the pandemic, though volume sales slow in 2022 due to inflation and the economic crisis

Unilever maintains its lead in oral care, however Carrefour launches its first private label in Tunisia, with products imported from France

Domestic players remain absent from the category due to the high production costs involved in manufacturing oral care products

PROSPECTS AND OPPORTUNITIES

Oral care remains populated by mass brands with the few premium brands available sold via pharmacies and recommended by dentists Diversified product range continues to drive sales of toothpaste and manual toothbrushes

The government regularly extends its oral hygiene programme to increase oral care awareness around the country but especially in rural areas

CATEGORY DATA

- Table 79 Sales of Oral Care by Category: Value 2017-2022
- Table 80 Sales of Oral Care by Category: % Value Growth 2017-2022
- Table 81 Sales of Toothbrushes by Category: Value 2017-2022
- Table 82 Sales of Toothbrushes by Category: % Value Growth 2017-2022
- Table 83 Sales of Toothpaste by Type: % Value Breakdown 2018-2022
- Table 84 NBO Company Shares of Oral Care: % Value 2018-2022
- Table 85 LBN Brand Shares of Oral Care: % Value 2019-2022
- Table 86 Forecast Sales of Oral Care by Category: Value 2022-2027
- Table 87 Forecast Sales of Oral Care by Category: % Value Growth 2022-2027
- Table 88 Forecast Sales of Toothbrushes by Category: Value 2022-2027
- Table 89 Forecast Sales of Toothbrushes by Category: % Value Growth 2022-2027

Skin Care in Tunisia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Continuous development of local industry players

International brands retain the lead thanks to consumer perception of their better quality and greater efficacy

Pharmacies becomes an important channel in the development of the skin care category in the country

PROSPECTS AND OPPORTUNITIES

The development of ingredients such as the inclusion of sun protection in skin care continues to rise over the forecast period Inflation represents the main threat to the development of skin care

Retail e-commerce broadens the scope of skin care sales

CATEGORY DATA

Table 90 - Sales of Skin Care by Category: Value 2017-2022

Table 91 - Sales of Skin Care by Category: % Value Growth 2017-2022

Table 92 - NBO Company Shares of Skin Care: % Value 2018-2022

Table 93 - LBN Brand Shares of Skin Care: % Value 2019-2022

Table 94 - LBN Brand Shares of Premium Skin Care: % Value 2019-2022

Table 95 - Forecast Sales of Skin Care by Category: Value 2022-2027

Table 96 - Forecast Sales of Skin Care by Category: % Value Growth 2022-2027

Sun Care in Tunisia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Narcisse Sund, the first Tunisian sun care brand to launch in the country Aftersun benefits from growing consumer awareness in the country Inflation negatively affects sales of sun care

PROSPECTS AND OPPORTUNITIES

The key players within sun care focus on innovation, varying SPF levels and widening the variety of pack sizes

Collaboration with social media influencers enables players to remain competitive

Growing exposure to advertising and government campaigns on the essential nature of sun care boost consumer awareness

CATEGORY DATA

Table 97 - Sales of Sun Care by Category: Value 2017-2022

Table 98 - Sales of Sun Care by Category: % Value Growth 2017-2022

Table 99 - Sales of Sun Care by Premium vs Mass: % Value 2017-2022

Table 100 - NBO Company Shares of Sun Care: % Value 2018-2022

Table 101 - LBN Brand Shares of Sun Care: % Value 2019-2022

Table 102 - LBN Brand Shares of Premium Adult Sun Care: % Value 2019-2022

Table 103 - Forecast Sales of Sun Care by Category: Value 2022-2027

Table 104 - Forecast Sales of Sun Care by Category: % Value Growth 2022-2027

Premium Beauty and Personal Care in Tunisia.

KEY DATA FINDINGS

2022 DEVELOPMENTS

New laws enacted in 2022 on imported premium products are designed to reduce the level of imports into Tunisia and consequently foreign currency reserves

Growth in parallel trading in premium beauty and personal care in 2022

Significant development of retail e-commerce for premium beauty and personal care products

PROSPECTS AND OPPORTUNITIES

Local production of premium beauty and personal care products on the rise over the forecast period

Demand for premium brands stagnates in volume terms over the forecast period

Fatales Tunisie remains the leading distributor of premium beauty and personal care products

CATEGORY DATA

Table 105 - Sales of Premium Beauty and Personal Care by Category: Value 2017-2022

Table 106 - Sales of Premium Beauty and Personal Care by Category: % Value Growth 2017-2022

Table 107 - NBO Company Shares of Premium Beauty and Personal Care: % Value 2018-2022

Table 108 - LBN Brand Shares of Premium Beauty and Personal Care: % Value 2019-2022

Table 109 - Forecast Sales of Premium Beauty and Personal Care by Category: Value 2022-2027

Table 110 - Forecast Sales of Premium Beauty and Personal Care by Category: % Value Growth 2022-2027

Mass Beauty and Personal Care in Tunisia

KEY DATA FINDINGS

2022 DEVELOPMENTS

New products developed by the local industry compete well on price compared to their international counterparts Imports from new countries further expand the mass beauty and personal care category Middle-income consumers trade down from premium to mass

PROSPECTS AND OPPORTUNITIES

Inflation impacts demand in the early years of the forecast period

Distribution remains important in developing mass beauty and personal care products with discounters becoming a more important channel Social media advertising and marketing campaigns on the rise as industry players embrace the importance of this channel in reaching their consumer bases

CATEGORY DATA

- Table 111 Sales of Mass Beauty and Personal Care by Category: Value 2017-2022
- Table 112 Sales of Mass Beauty and Personal Care by Category: % Value Growth 2017-2022
- Table 113 NBO Company Shares of Mass Beauty and Personal Care: % Value 2018-2022
- Table 114 LBN Brand Shares of Mass Beauty and Personal Care: % Value 2019-2022
- Table 115 Forecast Sales of Mass Beauty and Personal Care by Category: Value 2022-2027
- Table 116 Forecast Sales of Mass Beauty and Personal Care by Category: % 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/beauty-and-personal-care-in-tunisia/report.