

Beauty and Personal Care in Morocco

May 2023

Table of Contents

Beauty and Personal Care in Morocco

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 Penetration of Private Label in Beauty and Personal Care by Category: % Value 2017-2022
- Table 7 Distribution of Beauty and Personal Care by Format: % Value 2017-2022
- Table 8 Distribution of Beauty and Personal Care by Format and Category: % Value 2022
- Table 9 Forecast Sales of Beauty and Personal Care by Category: Value 2022-2027
- Table 10 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 Morocco

KEY DATA FINDINGS

2022 DEVELOPMENTS

Morocco's declining birth rate continues to put pressure on demand

Baby wipes proves resilient to the pressures created by the economic slowdown

Essential products weather the economic storm as demand remains consistent

Rising prices put pressure on demand, resulting in more regular price promotions

Products that target babies remain on top of the sales charts

PROSPECTS AND OPPORTUNITIES

Baby and child-specific products set to continue underperforming

Long-term trends with regards to the birth rate likely to remain unfavourable

Baby wipes to continue being seen as practical, useful and essential

Premium brands set to suffer as consumers migrate towards masstige brands

CATEGORY DATA

- Table 11 Sales of Baby and Child-specific Products by Category: Value 2017-2022
- Table 12 Sales of Baby and Child-specific Products by Category: % Value Growth 2017-2022
- Table 13 Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2017-2022
- Table 14 NBO Company Shares of Baby and Child-specific Products: % Value 2018-2022
- Table 15 LBN Brand Shares of Baby and Child-specific Products: % Value 2019-2022
- Table 16 LBN Brand Shares of Baby and Child-specific Skin Care: % Value 2019-2022
- Table 17 LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2019-2022
- Table 18 LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2019-2022
- Table 19 Forecast Sales of Baby and Child-specific Products by Category: Value 2022-2027
- Table 20 Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2022-2027

Bath and Shower in Morocco

KEY DATA FINDINGS

2022 DEVELOPMENTS

Improvements in hygiene habits mitigate the impact of falling spending power
Rising prices put pressure on demand as consumers trade down to private label
Consumers seek out added value as brands diversify and innovate
Segmentation expected to remain a major focus for the category leaders
Argan oil remains a major trend across various bath and shower categories
Natural positioning likely to remain a particularly popular area of added value
Antibacterial liquid soap continues to boom during the post-pandemic era
International players remain dominant despite the leadership of Lesieur Cristal

PROSPECTS AND OPPORTUNITIES

Few changes expected in bath and shower as sales continue to rise steadily Rising demand expected as high inflation gives way to greater unit price stability Strong headwinds unlikely as bath and shower remains an essential category

CATEGORY DATA

- Table 22 Sales of Bath and Shower by Category: Value 2017-2022
- Table 23 Sales of Bath and Shower by Category: % Value Growth 2017-2022
- Table 24 Sales of Bath and Shower by Premium vs Mass: % Value 2017-2022
- Table 25 NBO Company Shares of Bath and Shower: % Value 2018-2022
- Table 26 LBN Brand Shares of Bath and Shower: % Value 2019-2022
- Table 27 LBN Brand Shares of Premium Bath and Shower: % Value 2019-2022
- Table 28 Forecast Sales of Bath and Shower by Category: Value 2022-2027
- Table 29 Forecast Sales of Bath and Shower by Category: % Value Growth 2022-2027
- Table 30 Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2022-2027

Colour Cosmetics in Morocco

KEY DATA FINDINGS

2022 DEVELOPMENTS

Spending on colour cosmetics remains robust despite high inflation
Unit price increases due to high inflation suppress demand
Demand for lip products takes off as consumers begin to socialise more often
Eye make-up benefits from the prevailing trends as new looks prove crucial
Facial makeup continues to boom due to its status as an essential item
Nail products underperforms as the category is not in tune with current trends
Premium brands continue to struggle as consumers favour affordable options

PROSPECTS AND OPPORTUNITIES

An improved performance ahead for colour cosmetics

Mascara and foundation/concealer set to benefit from the prevailing trends

Colour cosmetics to continue facing limits on demand due to narrow consumer base

CATEGORY DATA

- Table 31 Sales of Colour Cosmetics by Category: Value 2017-2022
- Table 32 Sales of Colour Cosmetics by Category: % Value Growth 2017-2022
- Table 33 NBO Company Shares of Colour Cosmetics: % Value 2018-2022

- Table 34 LBN Brand Shares of Colour Cosmetics: % Value 2019-2022
- Table 35 LBN Brand Shares of Eye Make-up: % Value 2019-2022
- Table 36 LBN Brand Shares of Facial Make-up: % Value 2019-2022
- Table 37 LBN Brand Shares of Lip Products: % Value 2019-2022
- Table 38 LBN Brand Shares of Nail Products: % Value 2019-2022
- Table 39 LBN Brand Shares of Premium Colour Cosmetics: % Value 2019-2022
- Table 40 Forecast Sales of Colour Cosmetics by Category: Value 2022-2027
- Table 41 Forecast Sales of Colour Cosmetics by Category: % Value Growth 2022-2027

Deodorants in Morocco

KEY DATA FINDINGS

2022 DEVELOPMENTS

Improving personal hygiene standards support sales growth in deodorants

Growth accelerates amidst a return to work and socialising outside of the home

Deodorant sprays remains the largest category on the back of a strong performance

Pressure on value sales despite unit price growth as consumers trade down

Brands rely on novelty to attract the attention of increasingly sophisticated consumers

PROSPECTS AND OPPORTUNITIES

Positive growth ahead for deodorants as consumers become more demanding

Deodorant sprays set to remain the largest and most dynamic category of deodorants

Downwards pressure on unit prices to flow from price promotions

Demand for premium brands set to continue dwindling

CATEGORY DATA

- Table 42 Sales of Deodorants by Category: Value 2017-2022
- Table 43 Sales of Deodorants by Category: % Value Growth 2017-2022
- Table 44 Sales of Deodorants by Premium vs Mass: % Value 2017-2022
- Table 45 NBO Company Shares of Deodorants: % Value 2018-2022
- Table 46 LBN Brand Shares of Deodorants: % Value 2019-2022
- Table 47 LBN Brand Shares of Premium Deodorants: % Value 2019-2022
- Table 48 Forecast Sales of Deodorants by Category: Value 2022-2027
- Table 49 Forecast Sales of Deodorants by Category: % Value Growth 2022-2027
- Table 50 Forecast Sales of Deodorants by Premium Vs Mass: % Value 2022-2027

Depilatories in Morocco

KEY DATA FINDINGS

2022 DEVELOPMENTS

Sales of depilatories increase as local women pay more attention to hair removal Rising demand for convenient and time-saving products supports sales growth Women's razors and blades remain popular among less affluent consumer segments Hair removers/bleaches remains a small category due to competition from sugaring Women's pre-shave a small category due to the preference for low-cost alternatives Bic the leading name in depilatories due to the economical reputation of its products

PROSPECTS AND OPPORTUNITIES

Non-essential status of depilatories to put more pressure on sales growth Women's razors and blades to remain the default option for most consumers The custom of women using men's razors and blades set to limit sales potential Price discounting likely to remain at the core of marketing strategies

CATEGORY DATA

- Table 51 Sales of Depilatories by Category: Value 2017-2022
- Table 52 Sales of Depilatories by Category: % Value Growth 2017-2022
- Table 53 Sales of Women's Razors and Blades by Type: % Value Breakdown 2018-2022
- Table 54 NBO Company Shares of Depilatories: % Value 2018-2022
- Table 55 LBN Brand Shares of Depilatories: % Value 2019-2022
- Table 56 Forecast Sales of Depilatories by Category: Value 2022-2027
- Table 57 Forecast Sales of Depilatories by Category: % Value Growth 2022-2027

Fragrances in Morocco

KEY DATA FINDINGS

2022 DEVELOPMENTS

Overall demand for fragrances drops as spending power falls, favouring mass brands Direct selling supports a widening of the consumer base for mass women's fragrances Average unit price under pressure due to trading down from premium to mass brands Unisex fragrances remain unpopular as consumers prefer clearly gendered products

PROSPECTS AND OPPORTUNITIES

Consistently positive growth ahead for fragrances despite pressure on spending Mass fragrances set to outperform premium fragrances as consumers trade down Mass women's fragrances set to remain the largest and most dynamic category

CATEGORY DATA

- Table 58 Sales of Fragrances by Category: Value 2017-2022
- Table 59 Sales of Fragrances by Category: % Value Growth 2017-2022
- Table 60 NBO Company Shares of Fragrances: % Value 2018-2022
- Table 61 LBN Brand Shares of Fragrances: % Value 2019-2022
- Table 62 LBN Brand Shares of Premium Men's Fragrances: % Value 2019-2022
- Table 63 LBN Brand Shares of Premium Women's Fragrances: % Value 2019-2022
- Table 64 Forecast Sales of Fragrances by Category: Value 2022-2027
- Table 65 Forecast Sales of Fragrances by Category: % Value Growth 2022-2027

Hair Care in Morocco

KEY DATA FINDINGS

2022 DEVELOPMENTS

Rising interest in maintaining a neat and attractive appearance boosts demand 2-in-1 products and medicated shampoos are out-of-step with prevailing trends

More advanced formulas come to the fore as added value becomes more essential

The trend for tinting one's hair at home supports growth in colourants

Aggressive price discounting puts downwards pressure on the average unit price

Mass brands gather momentum as they underscore their dominance in hair care

Styling agents booms amidst a return to socialising and working outside of the home

L'Oréal maintains its very strong position in hair care via ownership of key brands

PROSPECTS AND OPPORTUNITIES

More value-added products set to appear as brands look to beat saturation

Conditioners slated for robust growth as sales rise from a relatively low base

Colourants to continue booming as the at-home approach to hair care spreads

Pressure on consumer spending set to prove crucial as brands reduce their prices

CATEGORY DATA

- Table 66 Sales of Hair Care by Category: Value 2017-2022
- Table 67 Sales of Hair Care by Category: % Value Growth 2017-2022
- Table 68 Sales of Hair Care by Premium vs Mass: % Value 2017-2022
- Table 69 NBO Company Shares of Hair Care: % Value 2018-2022
- Table 70 NBO Company Shares of Salon Professional Hair Care: % Value 2018-2022
- Table 71 LBN Brand Shares of Hair Care: % Value 2019-2022
- Table 72 LBN Brand Shares of Colourants: % Value 2019-2022
- Table 73 LBN Brand Shares of Salon Professional Hair Care: % Value 2019-2022
- Table 74 LBN Brand Shares of Styling Agents: % Value 2019-2022
- Table 75 LBN Brand Shares of Premium Hair Care: % Value 2019-2022
- Table 76 Forecast Sales of Hair Care by Category: Value 2022-2027
- Table 77 Forecast Sales of Hair Care by Category: % Value Growth 2022-2027
- Table 78 Forecast Sales of Hair Care by Premium vs Mass: % Value 2022-2027

Men's Grooming in Morocco

KEY DATA FINDINGS

2022 DEVELOPMENTS

The increasing importance of personal grooming among men boosts demand
Mass men's deodorants continues to benefit from its essential status
Men's razors and blades remains dominant despite current unfavourable style trends
Strong growth in men's skin care a clear signal of changing attitudes
The development of men's grooming in Morocco lags behind other countries

PROSPECTS AND OPPORTUNITIES

Sales growth ahead as attitudes towards men's grooming continue to evolve
Shift away from sharing beauty and personal care products to support sales growth
Men's deodorants slated for strong growth on the basis of their essential status
Maturity of demand set to suppress growth in men's shaving

CATEGORY DATA

- Table 79 Sales of Men's Grooming by Category: Value 2017-2022
- Table 80 Sales of Men's Grooming by Category: % Value Growth 2017-2022
- Table 81 Sales of Men's Razors and Blades by Type: % Value Breakdown 2019-2022
- Table 82 Sales of Men's Skin Care by Type: % Value Breakdown 2019-2022
- Table 83 NBO Company Shares of Men's Grooming: % Value 2018-2022
- Table 84 LBN Brand Shares of Men's Grooming: % Value 2019-2022
- Table 85 LBN Brand Shares of Men's Razors and Blades: % Value 2019-2022
- Table 86 Forecast Sales of Men's Grooming by Category: Value 2022-2027
- Table 87 Forecast Sales of Men's Grooming by Category: % Value Growth 2022-2027

Oral Care in Morocco

KEY DATA FINDINGS

2022 DEVELOPMENTS

Spreading awareness of the importance of oral hygiene supports rising demand A wider range of products becomes more appealing

Toothpaste remains dominant in sales of oral care due to innovation and new launches

Mouthwashes/dental rinses booms as consumers become more familiar with products

Toothbrushes remain essential as innovation sweeps through the category

Heavy use of price promotions puts downwards pressure on unit prices and value growth

Products with a natural positioning gain ground as demand patterns evolve

PROSPECTS AND OPPORTUNITIES

Growing awareness of the importance of oral hygiene set to support growth

Few major threats expected to emerge as oral care continues to develop

Unit prices set to decline due to aggressive price competition and regular promotions

Mouthwashes/dental rinses set to boom as consumers become more demanding

CATEGORY DATA

- Table 88 Sales of Oral Care by Category: Value 2017-2022
- Table 89 Sales of Oral Care by Category: % Value Growth 2017-2022
- Table 90 Sales of Toothbrushes by Category: Value 2017-2022
- Table 91 Sales of Toothbrushes by Category: % Value Growth 2017-2022
- Table 92 Sales of Toothpaste by Type: % Value Breakdown 2018-2022
- Table 93 NBO Company Shares of Oral Care: % Value 2018-2022
- Table 94 LBN Brand Shares of Oral Care: % Value 2019-2022
- Table 95 LBN Brand Shares of Mouthwashes/Dental Rinses: % Value 2019-2022
- Table 96 LBN Brand Shares of Toothpaste: % Value 2019-2022
- Table 97 Forecast Sales of Oral Care by Category: Value 2022-2027
- Table 98 Forecast Sales of Oral Care by Category: % Value Growth 2022-2027
- Table 99 Forecast Sales of Toothbrushes by Category: Value 2022-2027
- Table 100 Forecast Sales of Toothbrushes by Category: % Value Growth 2022-2027

Skin Care in Morocco

KEY DATA FINDINGS

2022 DEVELOPMENTS

Consumers increasingly using skin care to prevent ageing at a younger age

Mass anti-agers benefits from proliferation of value-added products

Skin care products with whitening properties remain very popular

Products designed specifically to be used around the eyes gain ground in facial care

Major multinational names dominate skin care, leaving little room for local players

PROSPECTS AND OPPORTUNITIES

Positive growth ahead due to the primacy of youthfulness in local beauty standards Mass anti-agers to continue benefiting from the desire to look younger No major threats expected to emerge despite the adverse economic situation Unit prices to rise due to high inflation and the rising cost of doing business

CATEGORY DATA

- Table 101 Sales of Skin Care by Category: Value 2017-2022
- Table 102 Sales of Skin Care by Category: % Value Growth 2017-2022
- Table 103 NBO Company Shares of Skin Care: % Value 2018-2022
- Table 104 LBN Brand Shares of Skin Care: % Value 2019-2022
- Table 105 LBN Brand Shares of Basic Moisturisers: % Value 2019-2022
- Table 106 LBN Brand Shares of Anti-agers: % Value 2019-2022
- Table 107 LBN Brand Shares of Firming/Anti-cellulite Body Care: % Value 2019-2022
- Table 108 LBN Brand Shares of General Purpose Body Care: % Value 2019-2022
- Table 109 LBN Brand Shares of Premium Skin Care: % Value 2019-2022
- Table 110 Forecast Sales of Skin Care by Category: Value 2022-2027
- Table 111 Forecast Sales of Skin Care by Category: % Value Growth 2022-2027

KEY DATA FINDINGS

2022 DEVELOPMENTS

Another positive performance for sun care as the post-pandemic recovery continues

Sun protection remains the most essential and important category of sun care

Global heating and increasingly regular heatwaves spur demand for sun care

Limited pressure on unit prices as brands engage in price promotions to remain relevant

Aftersun gains ground as sunburn becomes a more common problem

Key sun care brands look to add value via moisturising and anti-ageing properties

PROSPECTS AND OPPORTUNITIES

Sun care slated for positive growth as temperatures rise and consumers catch on Brand owners set to respond to rising demand with new value-added products

CATEGORY DATA

Table 112 - Sales of Sun Care by Category: Value 2017-2022

Table 113 - Sales of Sun Care by Category: % Value Growth 2017-2022

Table 114 - NBO Company Shares of Sun Care: % Value 2018-2022

Table 115 - LBN Brand Shares of Sun Care: % Value 2019-2022

Table 116 - LBN Brand Shares of Premium Adult Sun Care: % Value 2019-2022

Table 117 - Forecast Sales of Sun Care by Category: Value 2022-2027

Table 118 - Forecast Sales of Sun Care by Category: % Value Growth 2022-2027

Premium Beauty and Personal Care in Morocco

KEY DATA FINDINGS

2022 DEVELOPMENTS

Pressure on demand as challenging economic conditions curb discretionary spending Infrequent use due to high prices impacts demand for premium brands

Premium brands gradually gaining share, in line with global trends

Masstige brands threaten to steal premium brands' thunder

PROSPECTS AND OPPORTUNITIES

Ongoing economic malaise presents a potential threat to sales of premium brands Premium brands set to be strongest in fragrances, colour cosmetics and skin care Value for money set to remain the main priority for consumers of all income levels

CATEGORY DATA

Table 119 - Sales of Premium Beauty and Personal Care by Category: Value 2017-2022

Table 120 - Sales of Premium Beauty and Personal Care by Category: % Value Growth 2017-2022

Table 121 - NBO Company Shares of Premium Beauty and Personal Care: % Value 2018-2022

Table 122 - LBN Brand Shares of Premium Beauty and Personal Care: % Value 2019-2022

Table 123 - Forecast Sales of Premium Beauty and Personal Care by Category: Value 2022-2027

Table 124 - Forecast Sales of Premium Beauty and Personal Care by Category: % Value Growth 2022-2027

Mass Beauty and Personal Care in Morocco

KEY DATA FINDINGS

2022 DEVELOPMENTS

Mass fragrances benefits from high inflation and return to pre-pandemic lifestyles

Mass deodorants another big winner as consumers prioritise value for money

Rising popularity of masstige brands supports sales growth in mass skin care

Mass colour cosmetics continue to appeal due to low prices and good value for money

Mass brands lose ground in baby and child-specific products

PROSPECTS AND OPPORTUNITIES

Demand for mass brands to rise amidst high inflation and harsh economic conditions Improving image of mainstream brands to support demand for mass brands Mass hair care brands set to remain popular as consumers prioritise value

CATEGORY DATA

- Table 125 Sales of Mass Beauty and Personal Care by Category: Value 2017-2022
- Table 126 Sales of Mass Beauty and Personal Care by Category: % Value Growth 2017-2022
- Table 127 NBO Company Shares of Mass Beauty and Personal Care: % Value 2018-2022
- Table 128 LBN Brand Shares of Mass Beauty and Personal Care: % Value 2019-2022
- Table 129 Forecast Sales of Mass Beauty and Personal Care by Category: Value 2022-2027
- Table 130 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 focusing 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-morocco/report.