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?

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DISCLAIMER

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Baby and Child-Specific Products in Morocco

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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

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Bath and Shower in Morocco

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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

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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

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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

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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
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

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Hair Care in Morocco

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
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

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KEY DATA FINDINGS

### Oral Care in Morocco

#### 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

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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

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Skin Care in Morocco

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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

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Sun Care in Morocco
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

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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

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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
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