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
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
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 - Sales of Premium Beauty and Personal Care by Premium vs Mass: % Value 2017-2022
Table 108 - NBO Company Shares of Premium Beauty and Personal Care: % Value 2018-2022
Table 109 - LBN Brand Shares of Premium Beauty and Personal Care: % Value 2019-2022
Table 110 - Forecast Sales of Premium Beauty and Personal Care by Category: Value 2022-2027
Table 111 - 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, 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.